Forms Experts Program

Domain Name: GODD Page

Document Control Information

Document Information

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| Document Name | Forms Experts Output\_ GODD Page Combo |
| Document Author | Anupam Shukla |
| Document Version | 1.0 |
| Date Released | 08/29/2013 |

Document Edit History

| Version | Date | Additions/Modifications | Prepared/Revised by |
| --- | --- | --- | --- |
| 1.0 | 08/29/2013 | Initial version | Anupam Shukla |
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1. Functional Domain

GODD Page Combo

2. Business Justification

* **GODD** – Generate On Demand Documents. Document generation from GODD page is also known as adhoc triggers.
* There are two views of GODD page–

1. **Quote Consolidated** – To navigate to this view, user selects Generate On Demand Document option from the “Move To’ dropdown menu on Quote Consolidated Screen.
2. **Policy Consolidated** - User selects Generate On Demand Document option from the ‘Move To’ dropdown menu on Policy Consolidated Screen.

* Documents that can be generated are displayed and are enabled for the user.
* There are various delivery options such as Email , Central Print, eSignature, Local Print (Fax has been removed as a delivery method per defect 8339).

3. List of forms covered under the domain

| State initials | Form No. | Form Name |
| --- | --- | --- |
| All States | 60 5004 | Remove Recurring Pmt |
| 60 5005 | Returning Payment |
| AA06XX | Agent Advise Memo |
| AA10XX | Insurance Identification Card |
| AA11\_\_ | Auto Insurance Application |
| AAIQ\_\_ | Auto Insurance Quote |
| AAPDXX | Courtesy Coverage Permit Driver form |
| AASR22 | SR22 Financial Responsibility Form |
| AHAPXX | AutoPay Authorization Form |
| AHFMXX | Fax Memorandum |
| AHRCTXX | Insured Receipt for Funds |
| AU02 | Notice of Cancellation |
| AU03 | Notice of Declination |
| AU04 | Free Form to Insured |
| AU05 | Premium Misquote Information |
| AU06 | Free Form to Producer |
| AU07 | Notice of Non-Renewal |
| AU08 | Request for Additional Information |
| AU09 | Uprate Notice |
| AU10 | Potential Uprate |

It is important to note here that-

* If "AH" is the prefix to a form number this means the form is considered a shared common form between auto and property.
* If "\_\_" is part of a form number then "\_\_" means that the state identifier must populate as part of the form number.
* If "XX" is the last 2 characters in a form number this means that the form is a common library form. It is shared by multiple states and products. It may also have state specific delta's but the form number is not changed.
* Documents are enabled unless otherwise noted.

4. Analysis of Business Requirements

## Common Requirements

| Form No. | Form Name | Form Description and its Business Use |
| --- | --- | --- |
| 60 5004 | Remove Recurring Pmt | * This document is sent to the policyholder whose Recurring Payment plan is revoked due to returned or declined payment. * Present in “Policy Consolidated” View. |
| 60 5005 | Returning Payment | * This notice is generated when payment cannot be posted to the policy and is returned to the customer for various reasons. * Present in “Policy Consolidated” View. |
| AA06XX | Agent Advise Memo | * This notice is selected by Underwriter (UW) when they want to inform something to the agent. Possible scenarios are: effective date change, errors on application, other corrections are being made to the policy. * Present in “Policy Consolidated” View. |
| AA10XX | Insurance Identification Card | * Identification cards are required for each vehicle by each state’s Department of Insurance as a proof of insurance. * Present in “Policy consolidated” view |
| AA11\_\_ | Auto Insurance Application | * This document must be provided to the customer which they can sign and formally declare their interest in purchasing insurance. * Present in both “Ouote Consolidated“ and Policy consolidated” view |
| AAIQ\_\_ | Auto Insurance Quote | * This form is provided to the user if a quote is completed and a copy required by the user. * Present in “Ouote Consolidated“ view |
| AAPDXX | Courtesy Coverage Permit Driver form | * A letter is sent at Point-of-Sale explaining Courtesy Coverage to the insured for permit drivers on the policy and requests him to notify the company when the driver becomes licensed . * Present in “Policy Consolidated“ view |
| AASR22 | SR22 Financial Responsibility Form | * An SR22 is an insurance proof certificate that is filed by an insurance company with the Department of Motor Vehicle upon insured request * Present in “Policy Consolidated“ view |
| AHAPXX | AutoPay Authorization Form | * This document is used at Point-of-Sale when an insured wants to sign up for AutoPay (EFT – Electronic Funds Transfer).It can also be used when changing from direct bill payment method to an EFT payment method. This document is used for checking/savings account debit authorizations only. * Present in “Policy Consolidated“ view |
| AHFMXX | Fax Memorandum | * This will be the cover letter when faxing the Application and/or other documents sent to an insured for review, signature, and payment method selection. * Present in “Ouote Consolidated“ view |
| AHRCTXX | Insured Receipt for Funds | * This document is used as a receipt of funds by the Agent. * Present in “Policy Consolidated“ view |
| AU02 | Notice of Cancellation | * This letter is selected by an underwriter to cancel a policy due to underwriting reasons. * Present in both “Quote Consolidated” and “Policy Consolidated“ view |
| AU03 | Notice of Declination | * This letter is selected by an underwriter to cancel a policy due to underwriting reasons. * Present in “Quote Consolidated“ and “Policy Consolidated“ view |
| AU04 | Free Form to Insured | * This letter is selected by an underwriter for general correspondence to an insured. * Present in “Policy Consolidated“ view |
| AU05 | Premium Misquote Information | * This letter is selected by an underwriter to send a request to an insured for additional information. * Present in “Policy Consolidated“ view |
| AU06 | Free Form to Producer | * This letter is selected by an underwriter for general correspondence to an insured. * Present in “Policy Consolidated“ view |
| AU07 | Notice of Non-Renewal | * This letter is selected by an underwriter to non-renew a policy due to underwriting reasons * Present in “Policy Consolidated“ view |
| AU08 | Request for Additional Information | * This letter is selected by an underwriter to send a request to an insured for additional information. * Present in “Policy Consolidated“ view |
| AU09 | Uprate Notice | * This letter is selected by an underwriter to uprate the premium on a policy. * Present in “Policy Consolidated“ view |

## Related Change Requests (if any)

| CR No. | CR Name | States Impacted | CR Description and its Business Use |
| --- | --- | --- | --- |
| CR0257 | Customer Address Reposition form AA06AZ | AZ, IN, OK, OH, NV, UT, MT, WY and VA | * Customer address in form AA06XX needs to be repositioned to fit in the window of the outgoing envelope. * Change also requires repositioning of other text on the page. * This is DCS change only. |
| CR0004 | Add UW letters to the GODD page | CL, AZ, IN, OK, UT, NV, OH, MT, WY, VA | * Underwriting (UW) letters are sent to the insured and/or agents to communicate action taken by underwriting, outstanding information required by underwriting, or an informative correspondence. * Users should be able to generate these letters on demand. However, they are not currently available on the system, but should be present on the Generate on Demand Documents (GODD) page. |
| CR 0361 | Remove SR22 and Courtesy Coverage Notice from Documents Page | All States | * When a quote meets the condition for “SR22 Financial Responsibility Form” or “Courtesy Coverage Permit Driver form”, remove the display of these forms from Documents Page “Available for Printing” section. Instead they should appear on the Generate on Demand Documents page only after the policy is bound. |
| CR0423 | Notice of Declination | All States | * Currently in Signature Series CL AU03, Notice of Declination is only available at quote on the GODD page. For this change,AU03, Notice of Declination must also be available at new business on the GODD page for all states. |

5. Key Understanding of Design requirements

### System/UI Impact

* GODD Page is one of the UI Page combos( the other being Documents Page combo and Forms Page Combo).
* To navigate to the GODD Page ,user selects Generate On Demand Document option from the “Move To’ dropdown menu on Quote/Policy Consolidated Screen.

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | N/A |
| Documents Page | N/A |
| GODD Page\* | 880-840CL Consolidated Form Stories - GODD Page   * 880-840-A-#CL - Top Section Field Validation * 880-840-B-#CL - Delivery Method * 880-840-C-#CL - Bottom action buttons * 880-840-D-#CL - Forms & Conditional Form Fields |
| Forms Page | N/A |
| RFI | N/A |
| Packet/Print Story | N/A |

\* While designing state specific GODD Page requirements , the 880-840-D-#CL will be impacted because of the state specific forms that appear on the GODD Page. The other stories remain same as CL.

### Signature Rules(if any)

* N/A

### Document Content and Applicable Triggers

* N/A

### Key pointers to keep in mind

* Following forms are available on both Quote Consolidated and Policy Consolidated view of GODD Page-

1. AA11\_\_- Application page
2. AU02- Notice of Declination
3. AHFMXX- Fax memorandum( this is disabled in Policy Consolidated view)
4. **References to Documents**

| Document Name | Document Description |
| --- | --- |
| [880-840CL](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880_840CL_Consolidated_Form_Stories_-_GODD_Page) | Link for 880-840CL US/VC |
|  | PAS screenshots for GODD Page. |

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