Forms Experts Program

Domain Name: Auto Insurance Quote

Document Control Information

Document Information

|  |  |
| --- | --- |
| Document Name | Forms Experts Output\_Auto Insurance Quote Document |
| Document Author | Neha D Belthur |
| Document Version | 1.0 |
| Date Released | 07/29/2013 |

Document Edit History

| Version | Date | Additions/Modifications | Prepared/Revised by |
| --- | --- | --- | --- |
| 1.0 | 07/29/2013 | Initial version | Neha D Belthur |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Table of Contents

[1. Functional Domain 4](#_Toc367718142)

[2. Business Justification 4](#_Toc367718143)

[3. List of forms covered under the domain 4](#_Toc367718144)

[4. Analysis of Business Requirements 5](#_Toc367718145)

[4.1 Common Requirements 5](#_Toc367718146)

[4.2 State-specific Requirements (if any) 5](#_Toc367718147)

[4.3 Related Change Requests (if any) 6](#_Toc367718148)

[5. Key Understanding of Design requirements, (form wise) 7](#_Toc367718149)

[5.1 AAIQ\_\_ Auto Insurance Quote 7](#_Toc367718150)

[5.1.1 System/UI Impact 7](#_Toc367718151)

[5.1.2 Impacted Stories 7](#_Toc367718152)

[5.1.3 Signature Rules(if any) 8](#_Toc367718153)

[5.1.4 Document Content and Applicable Triggers 8](#_Toc367718154)

[5.1.5 Key Pointers to keep in mind 8](#_Toc367718155)

1. Functional Domain

Auto Insurance Quote

2. Business Justification

This notice is presented to a prospective customer when a quote has been completed. It is not a contract or policy, nor does it signify qualification. It is not a binding offer or insurance coverage.

The quote document calls out the various coverages opted by the customer, its limits and premiums for all the vehicles present on the policy.

The auto insurance quote form, like all other forms can be divided into three section-header, body and footer. The header section calls out the company, agency and the customer details. The body of the form is a tabular column. This column lists all the coverages that the customer may have elected along with the limits and premiums. Premiums are diaplayed for every vehicle on the policy with upto three vehicles on a page. A new page is added for every three vehicles. Vehicle sub total and the total premium are also displayed in this section. The body of the form also calls out the payment plan options. The form number and page number are displayed on the footer.

The form structure remains consistent across states. Coverages, form number and policy number are the most common state deviations that are seen across state.

3. List of forms covered under the domain

| Form No. | State initials | Form Name |
| --- | --- | --- |
| AAIQID | ID | Auto Insurance Quote |
| AAIQDC | DC | Auto Insurance Quote |
| AAIQKY | KY | Auto Insurance Quote |
| AAIQCT | CT | Auto Insurance Quote |
| AAIQDE | DE | Auto Insurance Quote |
| AAIQNY | NY | Auto Insurance Quote |
| AAIQNJ | NJ | Auto Insurance Quote |
| AAIQMD | MD | Auto Insurance Quote |
| AAIQPA | PA | Auto Insurance Quote |
| AAIQWY | WY | Auto Insurance Quote |
| AAIQMT | MT | Auto Insurance Quote |

4. Analysis of Business Requirements

## Common Requirements

| Form No. | Form Name | Form Description and its Business Use |
| --- | --- | --- |
| AAIQ\_\_ | Auto Insurance Quote | @ Quote   * If a quote is completed and copy required system generate form. * “Proposed effective date” is equal to quote date or no more than 45 days future date from quote date * Coverages will print as applicable to the state * All state applicable coverages display even if coverage is not purchased. * Up to three vehicles will print on a form [a total of nine vehciles can be quoted] * Print data only for the number of vehicles quoted * Form number should include the state identifier. |

## State-specific Requirements (if any)

| Form No. | State initials | Form Name | Form Description and its Business Use |
| --- | --- | --- | --- |
| AAIQID | ID | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQDC | DC | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQKY | KY | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format 4. City tax, County tax, State tax |
| AAIQCT | CT | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQDE | DE | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQNY | NY | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format 4. MVLE Fee |
| AAIQNJ | NJ | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format 4. PLIGA Fee |
| AAIQMD | MD | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQPA | PA | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQWY | WY | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |
| AAIQMT | MT | Auto Insurance Quote | DELTA   1. Coverages 2. Form Number 3. Quote Number format |

## Related Change Requests (if any)

| CR No. | CR Name | States Impacted | CR Description and its Business Use |
| --- | --- | --- | --- |
| N/A | N/A | N/A | N/A |

* 1. **References to Documents**
* [880-095CL](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-095CL_-_Documents_-_Adhoc_-_Quote_Document_for_New_Business)
* Quote specification document(see attachment)

5. Key Understanding of Design requirements, (form wise)

## AAIQ\_\_ Auto Insurance Quote

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | No | N/A | |
| Documents | | Yes | Document Available for Printing section  Default button is “Yes”  Same as CL | |
| GODD | | Yes | Present in “Quote consolidated view”  Same as CL | |
| Related UW Rule/Task | | No | N/A | |

### 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 | 880-095 - Documents- Adhoc - Quote Document for New Business |
| Documents Page | 880-830CL Consolidated Form Stories - Document Page   * 880-020CL - Documents Page - Field Validation - Documents available for printing |
| GODD Page | 880-840CL Consolidated Form Stories - GODD Page   * 880-220CL - Documents appearing on GODD page * 880-221CL - Available documents-Business rules |
| Forms Page | N/A |
| RFI | N/A |
| Packet/Print Story | N/A |

### Signature Rules(if any)

* N/A

### Document Content and Applicable Triggers

* This form is generated before policy bind(at quote)
* This form is not available in the packets.

### Key Pointers to keep in mind

* The main deltas are coverages, quote number, form number for each state. Very few states have any deltas apart from these.
* Coverages vary form state to state. Please refer to the quote specification document for exact deltas for each state.
* While creating VCs, all the information related to a delta coverage should be called out.
* Separate VCs should be written for coverages that are displayed on the quote form based on a specific condition selected on th UI. Preconditions of this VC should be detailed enough providing all steps required to set the conditionon UI

* + 1. **References to Documents**



About Deloitte

Deloitte provides audit, tax, consulting, and financial advisory services to public and private clients spanning multiple industries. With a globally connected network of member firms in 140 countries, Deloitte brings world-class capabilities and deep local expertise to help clients succeed wherever they operate. Deloitte's 165,000 professionals are committed to becoming the standard of excellence.

Deloitte's professionals are unified by a collaborative culture that fosters integrity, outstanding value to markets and clients, commitment to each other, and strength from cultural diversity. They enjoy an environment of continuous learning, challenging experiences, and enriching career opportunities. Deloitte's professionals are dedicated to strengthening corporate responsibility, building public trust, and making a positive impact in their communities.

Deloitte refers to one or more of Deloitte Touche Tohmatsu, a Swiss Verein, and its network of member firms, each of which is a legally separate and independent entity. Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu and its member firms. Please see <http://www.deloitte.com/us/about> for a detailed description of the legal structure of Deloitte LLP and its subsidiaries.

Internal Usage Statement

This publication is for internal distribution and use only among personnel of Deloitte Touche Tohmatsu, its member firms, and its and their affiliates. Deloitte Touche Tohmatsu, its member firms, and its and their affiliates shall not be responsible for any loss whatsoever sustained by any person who relies on this publication.

Copyright © 2013 Deloitte Development LLC. All rights reserved.

Member of Deloitte Touche Tohmatsu