Forms Experts Program

Domain Name: RFI Combo

Document Control Information

Document Information

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| Document Author | Robin Jain |
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1. Functional Domain

The functional domain covered is the RFI Combo with Story ID 880-860[State Identifier]

The State Identifier varies from one state to another.

2. Business Justification

This notice automatically generates as part of the New Business Packet when a document is identified as requiring a signature or a proof documentation is identified on the Document Page

The RFI document deals with two categories of documents:-

1. **Item(s) Requiring Your Signature:** This section contains those documents which require the signature of the insured which will result in the policy to be bound. Signature can be physical , eSignature, Voice signature (Generally AA11\_ forms have the option of Voice Signature). “Not Signed” tells us that a particular document has not been signed by insured.
2. **Copies of the following:** This section contains those documents which are required from the insured’s side. For example, documents related to any prior policy the insured had.

3. List of forms covered under the domain

| Form Type | State Initials & State Version | State specific Form Name |
| --- | --- | --- |
| Personal Auto Application | All States |  |
| Rejection UM/UIM or Election of Lower limits of UM/UIM | AZ  AA52AZ | Uninsured and Underinsured  Motorist Coverage Selection Form |
|  | CO  AA52COA | Rejection of Uninsured/Underinsured Motorist Coverage |
|  | CO  AA52COB | Statement Electing Lower Limits For Uninsured/Underinsured Motorist Coverage |
|  | CT  AA52CTB | Informed Consent Form Uninsured Motorist Coverage |
|  | IN  AA52IN | Uninsured/Underinsured Motorist Coverage—  Rejection or Election of Lower Limits |
|  | KS  AA52KSB | Statement Electing Lower Limits For Uninsured/Underinsured Motorist Coverage |
|  | KY  AA52KY | Rejection of Uninsured Motorist Coverage |
|  | MD | Notice & Waiver of Increased Limits of Uninsured Motorists |
|  | MT  AA52MT | Uninsured and Underinsured Motorist Coverage – Rejection or Election of Lower limits |
|  | NV  AA15NV | Uninsured Motorist Coverage and Underinsured Motorist Coverage – Election of Lower Limits/Rejection of Coverage |
|  | NY  AA52NY | Supplementary Uninsured/Underinsured Motorist Coverage -- Rejection or Election of Lower Limits” |
|  | OH  AA52OH | Rejection of Uninsured/Underinsured Motorist Bodily Injury Coverage |
|  | OH  AA57OH | Uninsured/Underinsured Motorist Bodily Injury Coverage Election of Lower Limits |
|  | OK  AA52OK | Uninsured/Underinsured Limit Selection Form |
|  | OR  AA52OR | Election of Lower Limits for Uninsured  Motorists Coverage |
|  | PA  AA52IPAA | Underinsured Motorist Coverage Selection/Rejection |
|  | PA  AA52UPAA | Uninsured Motorist Converge Selection/Rejection |
|  | SD | No Form – SD does not allow any options. Must purchase equal to BI. |
|  | UT  AA21UT | Uninsured Motorist  Coverage – Rejection or Election of Lower Limits |
|  | UT  AA21UTI | Underinsured Motorist  Coverage – Rejection or Election of Lower Limits |
|  | VA  AA52VA | Uninsured Motorist Coverage |
|  | WV  AA52WV | Uninsured Motorist Coverage Offer — Election of Limits |
|  | WY  AA52WY | Rejection of Uninsured/Underinsured Motorist Coverage |
| Rejection of UMPD (IN only) | IN  AA53IN | Rejection of Uninsured Motorist Property Damage Coverage |
| Rejection of Medical Payments Coverage | NV  AA16NV | Rejection of Medical Coverage |
|  | CO  AA16CO | Medical Payment Rejection of Coverage |
| No-Fault Rejection Form [KY] | KY  NF1bP&C | Kentucky No-Fault Rejection Form |
| Limited Personal Injury Protection Coverage - Rejection of Work Loss Benefits [UT] | UT  AA21UTP | Limited Personal Injury Protection Coverage - Rejection of Work Loss Benefits” |
| Notice & Waiver of Personal Injury (PIP) Coverage [MD] | MD | Notice & Waiver of Personal Injury Coverage |
| Named Driver Exclusion Endorsement | N/A: KS, MT, NV  Applicable to all other states with  AA43\_\_ unless specifically called out | Label change for AZ.  Named Driver Exclusion Election |
|  | UT  AA43UT | Utah Named Driver Exclusion |
|  | NY  AA43NY | Named Driver Exclusion Election |
| Non-Owner  Automobile Endorsement | Applicable to AZ, IN, OH, OK, NV as a signature form. | Non-Owner Automobile Endorsement |
| Notice of Inspection Requirement--Form D [NY] | NY  AAIFNYD | Acknowledgement of Requirement For Photo Inspection |
| Notice of Inspection Requirement--Form B [NY] | NY  AAIFNYB | Confirmation of Physical Damage Coverage  Notice of Mandatory Photo Inspection Requirement |
| Notice -- Copy of Sales Agreement Required--Form E. [NY] | NY  AAIFNYE | Notice – Copy of Sales Agreement Required |
| PA Important Notice | PA  AADNPAA | PA Important Notice (Benefits offered) |
| PA Notice to Named Insureds Regarding Tort Options | PA  AADNPAB | PA Notice to Named Insureds Regarding Tort Options |
| First Party Benefits Coverage and Limits Selection Form | PA  AAFPPA | First Party Benefits Coverage and Limits Selection Form |
| Coverage Selection Form | NJ  AACSNJ | Coverage Selection Form |
| Automobile Inspection Authorization | NJ  AAIFNJ2 | Automobile Inpsection Authorization |
| Acknowledgement of Requirements for Insurance Insepection | NJ  AAIFNJ4 | Acknowledgement of Requirements for Insurance Inspection |
| Allied Coverage Acceptance | AHCAAG | Allied Coverage Acceptance |
| Delaware Motorists Protection Act | AADNDE1 | DE Motorist Protection Act |
| Important Notice (PIP) – DE Understanding (PIP) Deductibles | AADNDEA | DE Understanding (PIP) Deductibles |
| Acknowledgement of Deductible Selections | AADNDEB | Acknowledgement of Deductible Selections |
| Personal Auto Application | All States |  |
| Rejection UM/UIM or Election of Lower limits of UM/UIM | AZ  AA52AZ | Uninsured and Underinsured  Motorist Coverage Selection Form |
|  | CO  AA52COA | Rejection of Uninsured/Underinsured Motorist Coverage |
|  | CO  AA52COB | Statement Electing Lower Limits For Uninsured/Underinsured Motorist Coverage |
|  | CT  AA52CTB | Informed Consent Form Uninsured Motorist Coverage |
|  | IN  AA52IN | Uninsured/Underinsured Motorist Coverage—  Rejection or Election of Lower Limits |
|  | KS  AA52KSB | Statement Electing Lower Limits For Uninsured/Underinsured Motorist Coverage |
|  | KY  AA52KY | Rejection of Uninsured Motorist Coverage |
|  | MD | Notice & Waiver of Increased Limits of Uninsured Motorists |
|  | MT  AA52MT | Uninsured and Underinsured Motorist Coverage – Rejection or Election of Lower limits |
|  | NV  AA15NV | Uninsured Motorist Coverage and Underinsured Motorist Coverage – Election of Lower Limits/Rejection of Coverage |
|  | NY  AA52NY | Supplementary Uninsured/Underinsured Motorist Coverage -- Rejection or Election of Lower Limits” |
|  | OH  AA52OH | Rejection of Uninsured/Underinsured Motorist Bodily Injury Coverage |
|  | OH  AA57OH | Uninsured/Underinsured Motorist Bodily Injury Coverage Election of Lower Limits |
|  | OK  AA52OK | Uninsured/Underinsured Limit Selection Form |
|  | OR  AA52OR | Election of Lower Limits for Uninsured  Motorists Coverage |
|  | PA  AA52IPAA | Underinsured Motorist Coverage Selection/Rejection |
|  | PA  AA52UPAA | Uninsured Motorist Converge Selection/Rejection |
|  | SD | No Form – SD does not allow any options. Must purchase equal to BI. |
|  | UT  AA21UT | Uninsured Motorist  Coverage – Rejection or Election of Lower Limits |
|  | UT  AA21UTI | Underinsured Motorist  Coverage – Rejection or Election of Lower Limits |
|  | VA  AA52VA | Uninsured Motorist Coverage |

4. Analysis of Business Requirements

## Common Requirements

| Condition | Description and its Business Use |
| --- | --- |
| Condition:  “Required to Bind” = NO  [NO = Form(s) requiring a signature was not received] | * If on the Document Page in the “Required to Bind” section a flag   is set to “NO” then condition will trigger system to generate form.   * If no form(s) require signature [all flags are Yes – as received] then DO NOT capture this section or any data elements |
| Condition:  “Required to Issue” = NO  [Copy (ies) of specified documentation(s) was not provided. | * If on the Document Page in the “Required to Issue” section a flag is set to “NO” then condition will trigger system to generate form. * If no copy (ies) is requested [all flags set to YES – as received] then DO NOT capture this section or any data elements. |
| @ New Business | * This document is currently generating and being included in the New Business packet if conditions to generate present. * Form number DOES NOT attach to the New Business Declarations in the FORMS & ENDORSEMENT section. |
| @ Amendment | * Form DOES NOT generate at time of an endorsement transaction. * Form number DOES NOT attach to Amended Declarations in the FORMS & ENDORSEMENT section |
| @Renewal | * Form DOES NOT generate at time of a renewal offer transaction. * Form number DOES NOT attach to Renewal Declarations in the FORMS & ENDORSEMENT section |
| @AdHoc | * Form is not available as an ADHOC document * If is only available in an eFolder |

## Related Change Requests (if any)

*NOTE: Here we list down any change requests related to the domain*

*In the “Form description and its business use” section, please mention your own understanding of the CR in a simple, easy to understand language.*

| CR No. | States Impacted | CR Description and its Business Use |
| --- | --- | --- |
| CR0495 | All States | * CR0495 - Remove the Named Driver Exclusion Form from CL Stories * The Named Driver Exclusion Form is state specific and should not be included in the Common Library. |
| CR0504 | All States | * CR0504 - Remove the UM/UIM forms from CL Stories. * The UM/UIM forms are state specific and should not be included in the Common Library.. |

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

### General Structure

The table below gives a brief description of the various stories to be covered while writing US-VC for RFI Combo for any State.

|  |  |
| --- | --- |
| **CL story** | **Description** |
| 880-860-A-CL | A – RFI Content |
| 880-860-B-#CL | B – RFI Triggers |
| 880-860-C-#CL | C – RFI forms under "Item(s) Requiring Your Signature" |
| 880-860-D-#CL | D – RFI forms under "Copies of the following" |

### Key pointers to keep in mind

* Please refer to the latest RFI business requirements document in the state specific folder for creating US-VCs for a state
* While creating US-VCs for RFI combo, mention form names in the same way as they appear on the business requirements document.

# References to Documents

EKM link to Commol Library documents or 880-860CL -

<https://ekmaaa.exigenservices.com/EKMWiki/index.php/880-860CL_Consolidated_Form_Stories_-_RFI>

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