Wireframe Steps

Information on the following pages have been modified/adjusted for confidential/proprietary reasons & to allow for public consumption
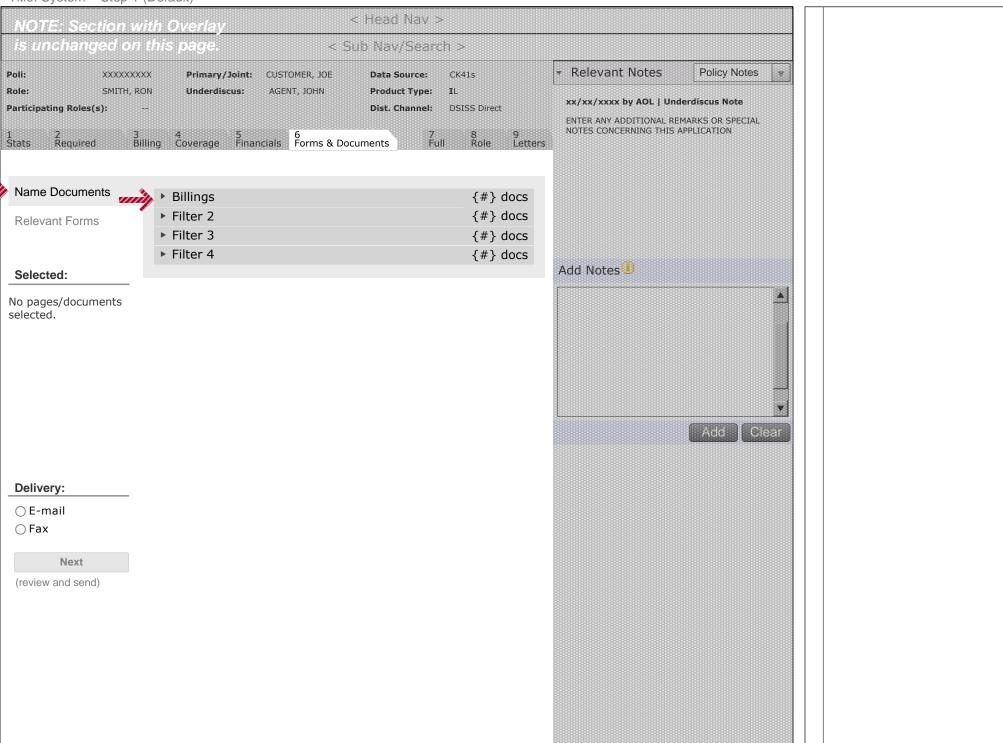
Purpose

A new process being introduced to internal users created the need to adjust wireframes for demo purposes. Modulated and granular information, including; notes, interactions and data details were removed in an attempt to validate the "Happy Path" with business stakeholders and current users during both contextual and group inquiries. The projects main purpose/goal removed the previously tedious process of manual paper splitting (i.e. printing, selecting individual pages and fax/emailing output) into a simplified and automated web based application. Those steps are outlined in the following pages.

Section 1

The following pages demonstrate the step-by-step flow for selecting and adding pages to a package for delivery. This section is purely demonstrative sample at the highest level and does not include notes, functional highlights, or granular details for interactions.

Title: System – Step 1 (Default)

< Head Nav >

NOTE: Section with Overlay is unchanged on this page.

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Poli:	XXXXXXXXX	**Primary/Joint:** CUSTOMER, JOE	**Data Source:** CK41s
Role:	SMITH, RON	**Underdiscus:** AGENT, JOHN	**Product Type:** IL
Participating Roles(s):	--		**Dist. Channel:** DSISS Direct

1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

▾ **Relevant Notes** | Policy Notes ▾ |

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ENTER ANY ADDITIONAL REMARKS OR SPECIAL NOTES CONCERNING THIS APPLICATION

Name Documents

Relevant Forms

▸ Billings	{#} docs
▸ Filter 2	{#} docs
▸ Filter 3	{#} docs
▸ Filter 4	{#} docs

Selected:

No pages/documents selected.

Add Notes 🟨

[Add] [Clear]

Delivery:

○ E-mail

○ Fax

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(review and send)

Notes

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Poli:	XXXXXXXXX	**Primary/Joint:**	CUSTOMER, JOE	**Data Source:**	CK41s
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Participating Roles(s):	--			**Dist. Channel:**	DSISS Direct

1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

Relevant Notes   Policy Notes ▼

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Name Documents

Relevant Forms

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▼ Billings	{#} docs
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Title: System – Step 3 (Select)

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Poli:	XXXXXXXXX	Primary/Joint:	CUSTOMER, JOE	Data Source:	CK41s
Role:	SMITH, RON	Underdiscus:	AGENT, JOHN	Product Type:	IL
Participating Roles(s):	--			Dist. Channel:	DSISS Direct

| 1 Stats | 2 Required | 3 Billing | 4 Coverage | 5 Financials | 6 Forms & Documents | 7 Full | 8 Role | 9 Letters |

▾ **Relevant Notes** | Policy Notes ▾ |

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Name Documents

Relevant Forms

Selected:

No pages/documents selected.

Delivery:

○ E-mail

○ Fax

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▾ Billings 2	mm/dd/yyyy

○ Full Document

⦿ Pages | 1,3,7-10 | Type page numbers and/or page ranges, for example: 1,4,6,8-10

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▸ Billings 3	mm/dd/yyyy
▸ Billings 4	mm/dd/yyyy
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Poli:	XXXXXXXXX	**Primary/Joint:**	CUSTOMER, JOE	**Data Source:**	CK41s	
Role:	SMITH, RON	**Underdiscus:**	AGENT, JOHN	**Product Type:**	IL	
Participating Roles(s):	--			**Dist. Channel:**	DSISS Direct	

1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

Relevant Notes   Policy Notes ▼

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Delivery:

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  ◉ Pages   [1,3,7-10]   Type page numbers and/or page ranges, for example; 1,4,6,8-10

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Participating Roles(s):	--		**Dist. Channel:** DSISS Direct

1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

Name Documents

Relevant Forms

▸ New Bus filter	{#} docs
▸ Service	{#} docs
▸ Other	{#} docs
▸ Order	{#} docs
▸ Countrywide Common Filters	{#} docs

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Policy Documents:

Billings:
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Delivery:

◯ E-mail
◯ Fax

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1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

Name Documents

Relevant Forms

Selected:

Policy Documents:

Billings:
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▶ New Bus Filter	{#} docs
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Name ▲	**Date** ▲
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1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

▾ Relevant Notes   Policy Notes ▾

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NOTES CONCERNING THIS APPLICATION

Name Documents

Relevant Forms

▸ New Bus Filter	{#} docs
▾ Service	{#} docs

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▸ Service 3	
▸ Service 4	
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▸ Order	{#} docs
▸ Countrywide Common Filters	{#} docs

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  Full Form

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Delivery:

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(review and send)

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1 Stats	2 Required	3 Billing	4 Coverage	5 Financials	6 Forms & Documents	7 Full	8 Role	9 Letters

Name Documents

Relevant Forms

▶ New Bus Filter	{#} docs
▼ Service	{#} docs

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▶ Service 2
▶ Service 3
▶ Service 4

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Relevant Forms:

Service:
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   Full Form

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▼ Relevant Notes | Policy Notes ▼

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Poli: 01N1E1234   **Primary/Joint:** CUSTOMER, JOE   **Data Source:** CK41s
Role: SMITH, RON   **Underdiscuss:** AGENT, JOHN   **Product Type:** IL
Participating Role(s): --   **Dist. Channel:** DSISS Direct

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ENTER ANY ADDITIONAL REMARKS OR SPECIAL CONCERNING THIS APPLICATION

1 Stats   2 Required   3 Billing   4

Name Documents

Relevant Forms

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Policy Documents:

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  1,3,7-10

Relevant Forms:

Service
▼ Service 1   X
  Full Form

Delivery:

◉ Email
○ Fax

Next

(review and send)

X

E-mail Delivery
You've selected to e-mail   Date: mm/dd/yyyy

Attachment(s)

Billings 1-XXXXXXXXX

Service 1

E-mail Options (* required)

* To (email)   *** From:**
email1@email.com   Jane Doe   ▼
(test@address.com)   jdoe@email.com

Poli Number: **Insured:**
XXXXXXXXX   John Dane

* Body
Example Body Text

{ error output }
Need to make changes?   Send
Back to Forms & Documents   Click to deliver to recipient

< Head Nav >

< Sub Nav/Search >

Poli: 01N1E1234   **Primary/Joint:** CUSTOMER, JOE   **Data Source:** CK41s

Role: SMITH, RON   **Underdiscuss:** AGENT, JOHN   **Product Type:** IL

Participating Role(s): --   **Dist. Channel:** DSISS Direct

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1 Stats   2 Required   3 Billing

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◉ Email
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Next

(review and send)

E-mail Delivery
You've selected to e-mail   Date: mm/dd/yyyy

Your e-mail has been successfully sent.

Close

X

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▸ Countrywide Common Forms   {#} docs

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