

Mandate

Tab Screen

Requirement Document

**Version 1.0**

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| **References** | | |
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| 1. CRIS Plus fields layout\_v9 varun comments\_del 1 2. Claim registration screens V6 |  |  |

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# Overview

The objective of this document is providing information of Mandate screen’s working with details of each screen. Functionality of mapping screen’s fields either with other screen’s fields or with user input. Specification

|  |  |  |  |
| --- | --- | --- | --- |
| ☐ | New | ☒ | Change Request |

* 1. Module

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ☐ | Diary | ☐ | System Admin Module | ☒ | Claim Registration |
| ☐ | Claim Payment | ☐ | Claim Recovery | ☐ | Claim Enquiry |
| ☐ | Upload | ☐ | Reports |  |  |

* 1. Development Type

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ☒ | Functionality | ☒ | Integration | ☐ | Rule |
| ☐ | Report | ☒ | Field | ☐ | Screen |

# Screen Details

* For Screen Layout Details please refer “Claim Registration Screens v6” presentation.

## Grid Screen

### Description

#### Grid screen will be updated once claim is created in claim tab screen.

#### Grid screen will have exact number of entries of claims as per created in Claim screen.

### Data Elements of Grid Screen

|  |  |
| --- | --- |
| **Field** | **Description** |
| Claim Type | This field will have Own Damage ( OD ) / Property Damage ( PD ) or Bodily Injury ( BI ) |
| Claim Number | This field will have claim Number which will be populated from accident screen, at the time of saving accident screen, claim number will be generated and that will also come here. |
| Claimant Name | Claimant name which will be saved under claim screen against a particular selected claim type will come under this column |
| Status | Pending / Rejected / Approved   1. By default “pending “will be displayed. 2. If supervisor “reject” then Rejected will be displayed. 3. If supervisor “approve” then Approved will be displayed. |
| Action | 1. Assign Mandate 2. View |

## 

### Button

1. Assign Mandate: By clicking this button screen will open up for assigning mandate to selected claim type.
2. View: Same screen will come up for view also , but this screen will not have Save button.

## Assign Mandate Screen for Claim type Own Damage (OD)

### Data Elements of Add New Party Screen

Nte : Below list information has been created with reference of “latest CRIS version” which is attached in 14219 TFS.

1. Size and field type

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **S.N.** | **Field** | **Source** | **Input box type** | **Field Data type** | **Size** | **Mandatory** | **Editable** | **Remarks** |
| 1 | Assigned To | user master -> user name | Drop down | Alphanumeric | 250 | Y | Y | User ->  Supervisor group |
| 2 | Type of Claim | claim Screen -> Claim type | Drop down | Alphanumeric | 10 | Y | Y | OD Claim,  TPPD Claim,  TPBI Claim |
| 3 | Investigation Result | user input | Drop down | Alphanumeric | 20 | N | Populated | Fully At Fault,  Nt At Fault,  Partial At Fault |
| 4 | Scenario | user input | Text | Alphanumeric | 1500 | Y | Y | Free text |
| 5 | CCTV | user input | Checkbox |  |  | N | Y |  |
| 6 | Witness Statement | user input | Checkbox |  |  | N | Y |  |
| 7 | Scene Pics | user input | Checkbox |  |  | N | Y |  |
| 8 | Related Facts | user input | Text | Alphanumeric | 1500 | N | Y | Free text |
| 9 | CO's Assessment | user input | Text | Alphanumeric | max allowable | Y | Y | Free text |
| 10 | **3rd Party's Claim Quantum** |  |  |  |  |  |  |  |
| 11 | Cost of Repairs |  | Text | Numeric | 11 | Y | Populated | \* Need Clarification :   1) What is 3rd party  Claim quantum.   2) From where values  will come in these boxes. |
| 12 | Loss of Use |  | Text | Numeric | 11 | Y | Populated |
| 13 | Liability (%) |  |  |  |  |  |  |
| 14 | Sub-Total |  | Text | Numeric | 11 | Y | Auto Calculated |
| 15 | Other Expenses |  | Text | Numeric | 11 | Y | Populated |
| 16 | Survey Fee |  | Text | Numeric | 11 | Y | Populated |
| 17 | Re-Survey Fee |  | Text | Numeric | 11 | Y | Populated |
| 18 | LTA/GIA/Police Report Fees |  | Text | Numeric | 11 | Y | Populated |
| 19 | 3rd Party Lawyer's Cost |  | Text | Numeric | 11 | Y | Populated |
| 20 | 3rd Party Lawyer's Disbursements |  | Text | Numeric | 11 | Y | Populated |
| 21 | Our Lawyer's Cost |  | Text | Numeric | 11 | Y | Populated |
| 22 | Our Lawyer's Disbursements |  | Text | Numeric | 11 | Y | Populated |
| 23 | Total | Sum of boxes | Text | Numeric | 11 | Y | Auto Calculated |  |
| 24 | **CO's Recommendations (Max) ,  Supervisor's Mandate (Max)** |  |  |  |  |  |  |  |
| 25 | Cost of Repairs | user input | Text | Numeric | 11 | N | Y |  |
| 26 | Loss of Use | user input | Text | Numeric | 11 | N | Y |  |
| 27 | Liability (%) | user input | Text | Numeric | 3 | N | Y |  |
| 28 | Sub-Total |  | Text | Numeric | 11 | N | Auto Calculated |  |
| 29 | Other Expenses | user input | Text | Numeric | 11 | N | Y |  |
| 30 | Survey Fee | user input | Text | Numeric | 11 | N | Y |  |
| 31 | Re-Survey Fee | user input | Text | Numeric | 11 | N | Y |  |
| 32 | LTA/GIA/Police Report Fees | user input | Text | Numeric | 11 | N | Y |  |
| 33 | 3rd Party Lawyer's Cost | user input | Text | Numeric | 11 | N | Y |  |
| 34 | 3rd Party Lawyer's Disbursements | user input | Text | Numeric | 11 | N | Y |  |
| 35 | Our Lawyer's Cost | user input | Text | Numeric | 11 | N | Y |  |
| 36 | Our Lawyer's Disbursements | user input | Text | Numeric | 11 | N | Y |  |
| 37 | Total |  | Text | Numeric | 11 | N | Auto Calculated |  |
| 38 | Remarks | user input | Text | Alphanumeric | max allowable | N | Y |  |
| 39 | **Supervisor Approval** |  |  |  |  |  |  |  |
| 40 | Assigned To | user input | Text | Alphanumeric | 250 | Y | Populated | CO Group user |
| 41 | Approve Recommendations | supervisor group user input | Radio button | Alphanumeric |  | Y | Y |  |
| 42 | Supervisor's Remarks | supervisor group user input | Text | Alphanumeric | Max allowable | N | Y |  |

Note:

1. If CO is login then only CO columns will be editable and if Supervisor is login then only supervisor mandate columns boxes will be editable.
2. For TPPD and TPBI , Assign Mandate screen has same functionality only reserve types can be different.

**Clarification Required**

1) Do we need to consider below formula for all Sub-total text boxes :

Sub-Total = (Cost of Repairs + Loss of Use) \* Liability

# Validations

**System validation 1:**

1. If the requested mandate amount is more than the reserve amount, system will not allow user to submit the request and prompt user to:

“Reduce the amount in the mandate request or update the reserve to a higher amount”.

1. If there are no updates in Supervisor’s Recommendation Column, system copy the amount in CO’s Recommendation column into Supervisor’s Recommendation column when Supervisor approves the Mandate request.

Ex:

If Supervisor only updates the COR amount and approves the Mandate request then system will automatically paste all CO’s recommendation columns values in supervisor’s recommendation column values.

**Clarification Required**

1. What is 3rd party claim quantum?
2. Do we need to display reserves also in mandate screen because mandate is validated based on reserve and mandate can not be more then reserve set against a particular claim type.

**System validation 2:**

1. |If Claim officer group user login

Then

1. Supervisor approval section and all supervisor recommendation columns will be non-editable.
2. Mandate details -> “Assigned to” drop down will have all supervisor group users names.
3. If Super visor group user login

Then

1. Mandate details section and all CO recommendation columns will be non-editable.
2. Supervisor approval -> “Assigned to” drop down will have all CO group users names.

# Implementation

## Current Implementation

* UI has been finalized of mandate screen.

## Targeted Implementation

* After saving of record in Claim tab , record will automatically come in Grid of mandate screen.
* IF record is present in grid screen then user will be able to assign mandate by clicking on “Assign Mandate ” button from Grid.

# Change Required

* Not Applicable