

Mandate

Tab Screen

Requirement Document

**Version 1.4**

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| 1.00 | 2 jan 2015 |  | | Creation of documents |
| 1.1 | 5 jan 2015 | Remarks column of 2.2.1 | | 1. Doubts on sub total, liability % and total |
|  |  | 2.1.2 | | 1) Added Clarification required |
|  |  | 3 | | Clarification required   1. 3rd party claim quantum? 2. Reserve screen value display on mandate? 3. Add new record on partial mandate ? |
| 1.2 | 14 January 2015 | Page 9,10 | | * Updated clarification required for sub total for BI claim type. * Added more doubts under Clarification required. |
| 1.4 | 3 June 2015 | 8 (Claimant Name, Supervisor-FAL), 11 (Assigned To, Supervisor Approval) | | * Updated documents with changes based on latest Releases. |
| 1.5 | 14 July 2015 | Page 13 | | * Updated with further clarification on what is required on the Supervisor’s Mandate Maximum Offer. |

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| **References** | | |
| **Document** | **Date Received** | **Author** |
| 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 ) |
| Claimant Record Number | This field will have number which will be populated from claim screen, at the time of saving claim screen, claimant record number will be generated and that will no come here.  Ex:  OD1,PD1,BI1 |
| 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 |

## 

Need Clarification :

1. Claim number:
   1. Can we add one column in grid as “ Claimant record number” ? Claimant record number will have (OD1,PD1,BI1).
   2. Please find below table having example of different type of number generated on claim life cycle.

|  |  |  |
| --- | --- | --- |
| Transaction | Number generation detail | Example |
| * Claim File received and saved data on accident screen | * Claim number created on Accident screen | * CL1 |
| * Record saving on Claim screen | * Claimant record number will be created on claim screen | * OD1 * PD1 * BI1 |

### Button

1. Assign Mandate: By clicking this button screen will open up for assigning mandate to selected claimant record 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** |
|  | Claimant Name | Claim Type -> Claimant Name | Text | Alphanumeric | 250 | Y | N | Populate Claimant Name so that user knows which Mandate they are creating for. |
| 1 | Assigned To | user master -> user name | Drop down | Alphanumeric | 250 | Y | Y | User->  Supervisor group |
|  | Supervisor Name - FAL | User master -> user name -> FAL (OD) / FAL (PD/BI) | Text | Numeric | 20 | Y | N | 03/06: Rename this Label to Supervisor’s FAL |
| 2 | Type of Claim | claim Screen -> Claim type | Drop down | Alphanumeric | 10 | Y | N | Default will be as per selection of Claimant record number  Ex:  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 |
|  | Inform Safety to review findings \* |  | Drop Down | Alpha |  | Y |  | Predefined as Yes and N.A |
| 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.  3)Please provide description of each of these fields.  Note :  Please add description of fields column in CRIs file and update it with small write up about the field.   1. W |
| 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 | Need Clarification :   1. Which of above columns values will come in grand total. |
| 24 | **CO's Recommendations (Max) ,  Supervisor's Mandate (Max)** |  |  |  |  |  |  | Notes:  1) Supervisor’s Mandate Max Offer Column is to populate the input values from CO’s Recommendations (Max) Column.  06/07: Note that this Column is to be populated even when Claim Officer or other User Groups (other than Supervisor) is inputting the values in the Claim Officer’s Mandate Maximum Offer Column  2) Other users other than Supervisors will be able to edit Our Previous Offers, 3rd Party Counter Offer and CO’s Recommendations Offer. Supervisor Group Users will not be able to edit these columns.  3) Supervisor Group Users can only edit the values in the Supervisor Approval and the edit the populated values in the Supervisor’s Mandate Maximum Offer. |
| 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 | Do we need to add Liability % and sub total in this ? |
| 38 | Remarks | user input | Text | Alphanumeric | max allowable | N | Y |  |
| 39 | **Supervisor Approval** |  |  |  |  |  |  |  |
| 40 | Assigned To | ~~user input~~  Claims Tab -> Claims Officer Field | Text | Alphanumeric | 250 | Y | Populated | Populated with CO Group user who is assigned in the Claim Tab -> Claims Officer Field |
| 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) Please provide formula of subtotal for BI claim type?

**14/7: Confirmation and Changes Required For CO’s Mandate Maximum Offer Column and Supervisor’s Mandate Maximum Offer Column**

There are 4 main Groups of Users:

1. Support Staff / Any other Group
2. Claim Officers
3. Supervisors
4. Claim Officers and Supervisors

Therefore on the Mandate Request Screens:

1. 3rd Party Claim Quantum Column 🡪 Blocked to all User Groups (1,2,3,4)
2. Our Previous Offers 🡪 Blocked to all Supervisors only (3)
3. 3rd Party Counter-offer 🡪 Blocked to all Supervisors only (3)
4. CO's Recommendations Maximum Offer 🡪 Blocked to all Supervisors only (3) and Any Inputs by the rest of Groups (1,2,4) will automatically populate Supervisor’s Mandate Maximum Offer Column. When assigned supervisor views the mandate request, the supervisor column will be editable for the supervisor to amend the figures in the supervisor column as required before they approve the mandate request.
5. Supervisor's Mandate Maximum Offer 🡪 Opened to all Supervisors and “Claim Officers and Supervisors” only (3,4). These users will just edit the values and select Approve/Reject.

# 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. [India Ebix response : Based on response on workflow document , reserve will be displayed on 3rd party quantum]
3. Can we have partial mandate approval? [India Ebix response : Partial mandate can be done]
4. Do we need to have tracking of multiple mandate approvals on same claimant record number?

[Clarification required updated on 14th jan 2015]

1. Do we need to make Mandate screen read only if other then Claim officer and Supervisor access mandate screen ?
2. For OD claim type , there are columns coming for Claim quantum and 3rd party claim quantum , what values will come in claim quantum if reserve values are going in 3rd party claim quantum ?
3. Do we need to make 3rd party claim quantum as “Non Editable “ ?
4. What will be default value of “Break Down “boxes under CO recommendation? (For an example: if user fill only two boxes and leave other boxes empty , then do we need to consider it as “0”?)

**[EBIX Singapore – 20 January 2015]**

5) Access to be based on User Rights in System Admin

6) Claim Quantum is what the CO initially decides to have… Third Party Quantum is an additional Column that CO will input in when they have asked Claimant for feedback and Claimant feels that the value is too little… these values will be for Supervisor as reference purposes to decide the approval amount.

7) It has to be editable.

8) It is best to ignore fields that are empty… there may be a possibility that User decides to input 0 as a value.

**Case study**

|  |  |
| --- | --- |
| Activity | Remarks |
| Reserve set 10000 against OD1 |  |
| Mandate given only for 2500 |  |
| Payment done for the same |  |
| Again for same OD1 user give another 2500 mandate approval | Do we need to create multiple row for adding mandate on same claimant record number? To track mandate approval history? |

**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