

Button Functionality of reserve screen

Requirement Document

**Version 1.5**

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| 1.4 |  |  | |  |
| 1.5 | 14-Jan-15 | Page 4 and 7 | | Updated with India Ebix Reseponse. |

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

# Grid Columns of Reserve screen

## On New Claim registration / Incomplete Claim registration

### Reserve History column in Grid Screen:

**Description**

* Button : **View**
  + It will show reserve history for a particular Claim type having below list.

|  |  |  |
| --- | --- | --- |
| **Field** | **Source** | **Remarks** |
| Claimant record Number | Accident Tab screen - > generated claim no. | Based on selected record in list claimant record number will come in Reserve history screen.  Ex: OD1,PD1,BI1 |
| Claimant Name | Claim tab screen  - > Claimant name | Based on selected record from grid screen claimant name will be displayed in reserve history screen. |
| Date Time | Reserve screen -> Record save date time | Time and Date on which reserve screen has been saved |
| Initial Reserve | Reserve screen -> Initial reserve column’s total | Total of initial reserve (for new/incomplete claim ‘s reserve screen ) or Reserve Outstanding ( for Claim adjustment ‘s reserve screen ) |
| Reserve Movement | Reserve screen -> Reserve Movement | Total of reserve movement column |
| Current Reserve | Reserve screen -> Current Reserve | Total of Current Reserve column |

Clarification Required

1. Please confirm the name of Claimant record number.

Singapore (9 Jan 2015): Please refer to updated Claim Number Generation Specification

1. Please approve reserve history screen columns to be displayed in report.

Singapore (9 Jan 2015): The screen layout needs to be changed to capture all movement history in the system:

* Reserve Movement
* Payment Movement
* Mandate Movement
* Recovery Movement
* LOG

The latest record is shown on the screen. A View History button needs to be created to show the above movement history.

Refer to document “Flow\_Reserve\_Mandate\_Payment\_V1.0”

[India Ebix response]

* Please provide list of column names that needs to be displayed in reserve history.
* Reference Document is having several columns. Do you want us to add all that columns in reserve history report screen?

[Singapore EBIX Response]

1) is the system able to capture individual fields with inputs, e.g. when Cost of Repair fields has some inputs while the rest do not have… the Reserve and Payment History will only show that item?

2) Will you be able to provide us with a suggested Layout? The Old Reserve And Payment History Screen is no longer visible in the Application so I cannot make the necessary changes.

Suggested Layout (Improve If Necessary)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date | Type | Description | Initial Amount | Changes | Outstanding |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

[India Ebix 14 January 2015]

* Yes we can capture individual field value in the system.
* Currently we are working on displaying consolidated history of reserve:
  + Example if user entered only cost of repairs as reserve then the consolidated amount of reserve will also be the same as per entered in cost of repairs and we will show that amount in reserve history.
  + Do we need to show each and every individual field history details in reserve history screen?

[Ebix Singapore 16 January 2015]

* Good. That will be preferred.
* We have highlighted to CDGI that in order to prevent the history screen from becoming too congested with values that have no inputs, we will only capture those with inputs and movements. So we do not have to show each and every field when there are no inputs

Suggested layout of reserve history screen:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Claimant Name | Claimant Record Number | Date & Time | Type | Description | Initial Reserve | Reserve Movement | Outstanding Reserve |
|  |  |  | Please provide “Type “ field value and criteria of using a particular type. | What information will come in this column and from which field we will populate information? |  |  |  |
|  |  |  |  |  |  |  |  |

[Ebix Singapore 16 January 2015]

* Type is the Movement Type, i.e. R is for Reserve, M is for Mandate, P is for Payment
* Description is the individual Field Value that has input.

### Action Column In Grid Screen

**Description :**

* Button : **Select**

Description : This button will display reserve screen with saved record. “Save” button will not come on this screen.

* Button : **Assign Reserve**

Description : This button will display reserve screen with saved records. “Save” button will not come on this screen.

## Claim Adjustment Screen

### Reserve History column in Grid Screen:

**Description**

* Button : **View**
  + It will show reserve history for a particular Claim type having below list.

|  |  |  |
| --- | --- | --- |
| **Field** | **Source** | **Remarks** |
| Claim Number | Accident Tab screen - > generated claim no. | Based on selected record in list claim number will come in Reserve history screen. |
| Claimant Name | Claim tab screen  - > Claimant name | Based on selected record from grid screen claimant name will be displayed in reserve history screen. |
| Date Time | Reserve screen -> Record save date time | Time and Date on which reserve screen has been saved |
| Outstanding Reserve | Reserve screen -> outstanding reserve total | Total of Outstanding Reserve column. |
| Reserve Movement | Reserve screen -> Reserve Movement | Total of reserve movement column |
| Current Reserve | Reserve screen -> Current Reserve | Total of Current Reserve column |

### Grid Screen Data elements

Description: Data elements of Grid screen will be same as per Reserve screen coming on “New “and “Incomplete” screen data elements except “Action” column.

Action column will have following buttons:

**Description:**

* Button : **Select**

Description : This button will display reserve screen with saved record. “Save” button will not come on this screen.

* Button : **Reserve Adjustment**

Description : This button will display reserve screen with saved record. Reserve movement column‘s boxes will be editable. This activity will create another row on grid of reserve with same claim type and adjusted reserve amount.

* Button : **Edit**

Description : This button will be used to edit existing saved record. It will not create any other line in grid.

* Button : **Finalize**

[India Ebix response]

Description :

1. By clicking this button record will be finalized. Once a record is finalized, then it cannot be edited. Edit button will be hide when record is finalized.
2. Finalize button will give functionality of approval of any reserve change , for an example , if support staff changes reserve from 10000 to 12000 , this change will not apply until this change been finalized.

[Singapore EBIX Response]

What is the difference between this Button and the Claimant Status “Finalized”? CDGI has highlighted that they prefer to have a dropdown to indicate or to change the Claim Status.

[India Ebix 14 January 2015]

1. Finalized button on reserve screen is for freezing any change of reserve.
2. User need to Finalize each, reserve change to make it impact on mcas application ( Mandate and payment screen)

Example

* Initial reserve = 10000
* User then again adjusts it with 2000.
* Total 12000 reserves will impact on application once user finalizes reserve adjustment by clicking on “finalize button” on reserve screen of claim adjustment menu.

Note:

* Can we implement above mentioned functionality of finalization on movement in Mandate and payment screen also?

[Ebix Singapore 16 January 2015]

This part I am still not too sure on how it works. The agreement with CDGI is that if they have entered an initial reserve and if they think that they have made a mistake, they will use the movement to correct it to make the value higher or lower. Therefore the system will always capture the initial reserve as it is first entered.

The Finalize button may not be of use here. We can have a call on this if required when Aasai is back on 19 January.