

Service Provider

Tab Screen

Requirement Document

**Version 1.2**

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

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# Overview

The objective of this document is providing information of service provider field’s information. 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

* + - By Default Grid will come with collapse list of claim records created in Claim tab
    - Total 6 Columns will be displayed
    - Other than Claim type, all columns will not show anything in collapse mode
    - When user expand claim type record , then user will able to view all record created under that particular claim with claimant name details
    - Two buttons will come in Action column i.e. Add and Select

### Data Elements

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Type** | **Length** | **Description** |
| Claim Type | Label | NA | Read Only Label   * It will have Claim type record created in claim screen.   Ex : OD , PD or BI |
| Record Number |  | NA | Read Only Label   * It will have particular record number   Ex: OD1,PD1,BI1 |
| Claimant Name |  | NA | Read Only Label   * It will have Claimant name against particular record number which will come from claim tab |
| Service Provider Name |  | NA | Read Only label   * It will have service provider name ( which come from created record) |
| Provider Type |  | NA | Read Only Label   * It will have provider type, which is added under service provider add screen.   Ex:  Insurer , surveyor , Workshop and Lawyer |
| Action | Button | NA | Add and Select |

## 

### Button Information

* + - Add Button : Add button will come in row of each claimant name when grid having expanded to view list of claims under claim type
    - Edit Button : Once a Service provider is assigned to a claimant then add button for that particular row on which service provider has been added will be changed to “Edit “ .
    - Select: This button is to view added information .

## Add New Party Screen

### Description

* + - This screen will come once add button on grid screen will be clicked
    - Claim type, claimant name, party type and service provider type and company name will be added by user
    - Based on party type and service provider type user , drop down list of company name will have names from service provider master
    - Once company name selected, rest all values will be filled with records.

### Data Elements of Add New Party Screen

Note: For below list information please refer latest CRIS version from 14219 TFS.

1. Size and field type

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Field** | **Source** | **Input box type** | **Field type** | **Size** | **Mandatory** | **Editable** | **Remarks** |
| Claim Type | From Claim Screen |  | Alphanumeric |  |  | Y | As per record selected from Grid Claim type will come |
| Claimant Name | Claim Screen |  | Alphanumeric |  |  | Y | As per record selected from Grid Claimant name will come |
| Party Type | Please refer remarks | Drop Down List | Alphanumeric |  | Y | Y | Static in nature, only four party type has been defined |
| Service provider type | Please refer remarks | Radio Button | Alphanumeric |  | Y | Y | Own or TP |
| Company Name | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Appointed Date | Service provider master |  | Date Field |  | Y | Y | Appointed Date is editable only when adding Own Provider Type and Grayed when adding Third Party Type |
| Address 1 | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Address 2 | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Address 3 | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| City | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| State | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Country | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Postal Code | Service provider master |  | Numeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Reference No | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| 1st Contact Person's Name | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Email Address | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Office No | Service provider master |  | Numeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Mobile No | Service provider master |  | Numeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Fax No | Service provider master |  | Numeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Status | Service provider master |  | Alphanumeric |  | Y | N | Based on selected party type and service provider type , value will come from service provider master |
| Remarks | **User Input** | **Text box** |  |  | **N** | **y** | **Free text field** |

# 

### Button Information

* + - Save Button : This button will save all record in database
    - Back Button : Back button take screen to grid .
    - View History button : Under clarification with client

# Rule

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **IF** | **Then** | **Else** | **And** | **Or** |
| Record saved in Claim tab | That record must come in grid of Service provider master |  |  |  |
| Grid record saved very first time | Add button of that record in service provider record change into “Edit” button |  |  |  |
| Service provider master updated with any record | That record must reflect in company name |  |  |  |

# Implementation

## Current Implementation

* UI has been finalized of service provider screen.

## Targeted Implementation

* After saving of record in Claim tab , record will automatically come in Grid of service provider master screen
* IF record is present in grid screen then user will be able to add service provider by clicking on “Add” button from Grid.
* Once “ record “ has been saved for a particular row in service provider master then “Add” button should change into “ Edit “ button.
* For a single claim type there can be multiple service provider , like for od001 , user can add surveyor , insurer , workshop and lawyer.

# Change Required

* Not Applicable

# Additional change

* Change in grid screen

1) Grid will show records created in claims screen.

2) Add one column as add, in grid, to view on each claim type for collapse mode only.