Admin User
Agent
Customer

Agent Portal

Admin Role
- Login for USAA(Admin)
- Agent Onboarding

Agent Role
- Self Service
- Agent Login
- Landing page
- Dashboard/Summary
- Collect Member Data
- TBD Member
- Quote Flow component
- Quote Presentment
- Acceptance Experience

Customer Role
- Payments
- eSign

Agent Role
- Bind & Issue

New Agent Sales UI

If customer is a non-member, collect USAA eligibility responses and route to Join Experience

When the lead in member Id is of an existing member

Collect additional member details

Sales UI .com
- Quote Flow component
- eSign
- Bind & Issue

Validate token for API Calls

OKTA

Final packet is sent for TCS Verification when the policy has TBD Member ID

Micro Front End Components
- Quote Presentment
- Acceptance Experience
- Landing page
- Collect Member Data
- TBD Member
- Payments
- Quote Flow component
- eSign
- Bind & Issue

Stripe

Via a webhook, Stripe will update BASE about payment status
Pass the downPaymentID in metadata

Agency Management System Services
- Agent Mgmt
- Admin Mgmt
- spring boot

Login/Generate OIDC Token

ForgeRock

Agent Quote Management System Services
- Member Validation API
- TBD Member Number API
- Agent Summary API
- Agent Quote API
- Policy Inquiry API
- Claims Inquiry API
- spring boot

Sales Microservices
- Payment API
- Producer API
- UW API
- Quote API
- Eligibility API
- Data API
- General Liability API
- Agency Integration API
- Claims Experience API
- Policy Experience API
- (Orchestration & GW Mediation)
- spring boot

BASE/FINPAL
Invoke BASE and get downPayments

TCS Verification

Guidewire PolicyCenter
Guidewire ClaimsCenter

Tokenize Agent Sensitive Information
Tokenization Service

Store agent/agency info

Store Quote info

Agency Management(Internal) : UI
- **Authentication** : Managing agent credentials - integration with Okta & Forgerock
- **Onboarding** : To manage onboarding of an agent/agency - Hierarchy, License, Compensation

Agency Management : New Microservices
- Agent Mgmt: Create new agency / agent with hierarchy, license and compensation information, in the Agent SOR
- Admin Mgmt: To create and manage agent admin information

Agent SOR
- New database to store Agency/Agent data

Agent Portal : UI
- **Self service** : Allow agents to register by themselves to get attached and admin user will approve/deny
- **Agent Login** : Manage Agent Login - integration with Okta
- **Landing Page** : View Dashboards (policy, billing, claims, commissions), view portfolio details
- **Claims Inquiry**: Fetch and view member claim details
- **Payment Inquiry**: Fetch and view member policy premium details

Agent Portal : New Microservices
- **Agent Info:** Fetch agent information from the agency management system
- **Agent Summary**: To pull information about agent's quotes, policies created, members belonging to agent
- **Claims Inquiry** : To inquire about claims made by the member
- **Payment** : To inquire about payments for the policies being created by agent
- **Policy Inquiry**: To inquire about the policies issued by the agent.

Sales Microservices Changes
- Data API : Member look up specific changes
- Quote API : Changes to accommodate information about quote being raised by agent for a member
- UW API: Agent related changes on questionnaire for quote process
- Eligibility API: Changes to enable eligibility checks and validate submitted quotes by agent
- Policy Experience API: To manage integration with GW PC to have the agent/agency related information during quote and policy creation workflows

Other services
- **Member Validation and Eligibility:** After agent enters the member details, member validation and eligibility check. This service is developed by Auto LOB
  * Handling the TBD Member ID will be in sync with the design of Auto LOB
- **TBD Member Number API**: When the entered details are not of an existing member this API will be used to get a TBD member number.
- **Payments** : Payment will happen before the policy issue when agent creates the quote by leveraging BASE/FINPAL.
- **TCS Verification:** This is a manual process

Guidewire Changes
- **Agent Details:** GWPC will store all the relevant and necessary information of the Agent/Agency on the Policy record.
- **Documents:** GWPC will send a notification to SmartComm to send a copy of the Policy packet.
- **Producer API:** Develop custom API to share the agent details to the Sales UI.