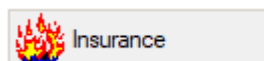


Module: eInsurance



Contact: Mary Cochran

Team Members: Jim Holstein, Lauren Hancock, Kate Webbink

Admin Review: Janeen Jones

FMNH documentation finalised: v2

Submitted for Axiell review: 7 December 2018

Date submitted for development:

Date implemented in live:

SUMMARY STRINGS

Default:	2
Other(s): See Default	2

Tabs

Tabs to be added:	2
EXISTING Tab - AllNteTab (Notes)	2
Tabs to be updated:	3
EXISTING TAB - AllClaTab (Claims	3
NEW fields:	3
EXISTING fields:	3
EXISTING TAB - AllCovTab (Cover)	4
NEW fields:	4
EXISTING fields:	4
EXISTING TAB - AllProTab (Provider)	5
NEW Fields	5
EXISTING	5
Tabs no longer needed: None	5

Tools - NONE

Broken Things - NONE

Red Flags

SUMMARY STRINGS

Default:

ProInsuredBy + “ : ” + **CovCategoryOfCover** + “ (“ + **CovStartDate** + “ “ + **CovExpiryDate** + “) ”

- If current date is after **CovExpiryDate**, + “EXPIRED”

e.g.(irn 8) : Field Museum of Natural History - Technology Department : Fine Arts (01 May 2018 - 03 July 2018)

Other(s): See Default

e.g.(irn)

Tabs

Tabs to be added:

EXISTING Tab - AllNteTab (Notes)

The screenshot shows a software window titled "Insurance (1) - New". The menu bar includes File, Edit, Select, View, Tools, Tabs, Multimedia, Window, and Help. The toolbar contains various icons for file operations and editing. The main area is divided into sections: "Note Details" with fields for "Notes" (a large text area), "Attributed to:" (a dropdown menu with an asterisk icon), "Date:" (a text field), and "Kind of Note:" (a dropdown menu). Below this is a "Notes" section with a table. The table has columns for "Notes", "Date", and "Kind of Note". The table contains three rows, with the third row highlighted. At the bottom, there is a tab bar with buttons for "Claims", "Tasks", "Notes", "Multimedia", "Security", "Audit", and "Admin". The "Notes" tab is currently selected. The status bar at the very bottom shows "New", "Policy 1 of 1", and user information "sgrant", "Admin", and "emufmnh".

	Notes	Date	Kind of Note
1			
2			
3			

- Enable the standard EMu Multivalued Standard Notes Tab

Tabs to be updated:

EXISTING TAB - AllClaTab (Claims

Insurance (1) - New

File Edit Select View Tools Tabs Multimedia Window Help

Claim Information

Claim Number: Claim Status:

Claim Details:

Museum Contact:

Date Claim Made: Amount Claimed:

Date Claim Settled: Settlement Amount:

Claims Made

	Claim Number	Claim Status	Date Claim Made	Date Claim Settled
*				

Provider Cover **Claims** Tasks Notes Multimedia Security A

New Policy 1 of 1 sgrant Admin emufmnh

NEW fields:

- **Museum Contact:** *Attachment [S] eparties*

EXISTING fields:

- **Claim Status:**
 - Display ClaClaimStatus_tab in the "Claims Made" table between Claim Number [ClaClaimNumber_tab] and Date Claim Made [ClaDateClaimMade0]

Fields to REMOVE: None

Functionality: None

EXISTING TAB - AllCovTab (Cover)

Insurance (1) - New

File Edit Select View Tools Tabs Multimedia Window Help

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Cover Details

Policy Number:

Cost of Cover:

Notification Date:

People To Notify:

Limit Of Cover:

Start Date:

Exclusions:

Category of Cover:

Due Date:

Deductible:

End Date:

Provider Cover Claims Tasks Notes Multimedia Security

New Policy 1 of 1 sgrant Admin emufmnh

NEW fields:

- **Exclusions:** Text [S] 255 chars.

EXISTING fields:

- **CovExcess:**
 - Relabel as "Deductible"

Fields to REMOVE: None

Functionality: None

EXISTING TAB - AllProTab (Provider)

The screenshot shows a software window titled "Insurance (1) - New". It features a menu bar with "File", "Edit", "Select", "View", "Tools", "Tabs", "Multimedia", "Window", and "Help". Below the menu is a toolbar with various icons for file operations and editing. The main area is divided into several sections: "Insurance Details" with fields for Insured, Postal Address, City/Town, State/Province, Country, Post/Zip Code, Phone (BH), and Fax; "Indemnity Detail" with fields for Document Title, Indemnifier, Postal Address, City/Town, State/Province, Country, Post/Zip Code, Phone (BH), and Fax; and "Associated Policies" with a list box containing one entry marked with an asterisk. At the bottom, there is a tabbed interface with tabs for "Provider", "Cover", "Claims", "Tasks", "Notes", "Multimedia", "Security", and "A". The "Provider" tab is currently selected. Below the tabs, there is a status bar showing "New", "Policy 1 of 1", and user names "sgrant", "Admin", and "emufmnh".

NEW Fields

- **Associated Policies:** Attachment [M] einsurance

EXISTING

- **ProInsuredBy:**
 - Relabel as "Insured"

Fields to REMOVE: None

Functionality: None

Tabs no longer needed: None

Tools - NONE

Broken Things - NONE

Red Flags

- Dependencies: Eparties