

**Critical Illness,
'Term Enhancement' and
General Wireframe Package**

Final Draft - April 29, 2015

CRITICAL ILLNESS - DEFAULT OVERVIEW

A Web Page

← → ↺

Q http://

☰

☰ Product Selector ▾

+ New

📂 Open

📄 View Report

💾 Save

💾 Save as

Lastest changes have not yet been saved...

LOGO

[Contact](#) | [Francais](#)

Sign In

Sun Life Illustrations

Select Business Card:

Joanne Macloud

manage business cards

PLAN DESIGN

SPREADSHEET

REPORT DESIGN

Sun Critical Illness Insurance: Illustration name here

rename

Client

Person 1

First Name: Person 1

Last Name:

☑Male ○Female

Age: 35

or

Birth Date: dd / mm / yyyy

Smoker: ☑No ○Yes

Client Ratings: ☐ Include ?

Coverage

Coverage 1

Coverage type: single life

Insured: person 1

Coverage term: Term 75 ▾

Premium option To age 75 ▾

Coverage amount: policy fee amount \$250,000

solve by payment: ☐ ?

Amount must be between \$250,000 and \$15,000,000

Optional Benefits

Benefit:	Client:	Options:	Rating:
<input type="checkbox"/> Return of premium on death ?			
<input type="checkbox"/> Return of premium on cancellation or expiry ?			
<input type="checkbox"/> Disability waiver ?			
<input type="checkbox"/> Loss of independent existence (LOIE) ?			
<input type="checkbox"/> Long term care conversion option ?			

Plan Details

Premium frequency: ☑Monthly ○Yearly

Override policy fee?: yes ☐ ?

policy fee amount \$25

Amount must be between \$0 and \$999

Save

Save As

View Report

You have successfully saved this illustration

Assign ?

This illustration is owned by (x)

About Critical Illness

• Lorem ipsum

• Consectetur adipiscing elit

• Duis aute irure dolor

link 1...

link 2...

Illustration Summary

refresh

see Illustration summary wireframe for specifics

CRITICAL ILLNESS - CLIENT RATINGS

Clients

Person 1

First Name:

Person 1

Last Name:

☒ Male ☐ Female

Age:

35

or


Birth Date:

dd / mm / yyyy

Smoker:

☒ No

☐ Yes

Client Ratings: Include ☒ 

Morbidity

Assessment:

standard



CRITICAL ILLNESS - BACKDATE TO SAVE AGE

Only show backdating if DOB is entered and **IS** available. Rely on training the user.

1enter DOB

Sun Critical Illness Insurance: Illustration name here [rename](#)

Clients

Person 1

First Name: Last Name:

☒ Male ☐ Female

Age: or Birth Date: Smoker: ☒ No ☐ Yes

Client Ratings: [?](#) ☐ Include

2DOB is entered - system advises that backdating is available

Sun Critical Illness Insurance: Illustration name here [rename](#)

Client

Person 1

First Name: Last Name:

☒ Male ☐ Female

Age: or Birth Date: Smoker: ☒ No ☐ Yes

Backdating to save age is available! [?](#) ☐ Yes, backdate to save age

Client Ratings: [?](#) ☐ Include

3user selects checkbox - RA is displayed

Sun Critical Illness Insurance: Untitled Illustration

Client

Person 1

First Name: Last Name:

☒ Male ☐ Female

Age: or Birth Date: Smoker: ☒ No ☐ Yes

Backdating to save age is available! [?](#) ☒ Yes, backdate to save age Retained Age: 34

Client Ratings: [?](#) ☐ Include

message also shown in Illustration summary w' RA

Illustration Summary [update](#)

Messages

lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam.

CRITICAL ILLNESS - MINIMUM AGE (30 days)

if age "0" is entered

Sun Critical Illness Insurance: Illustration name here

rename

Clients

Person 1

First Name: Person 1

Last Name:

☐ Male ☐ Female

Age: 0

or

Birth Date: dd / mm / yyyy

Smoker: ☒ No ☐ Yes

Client Ratings: ☐ Include ?

message/notification shown in Illustration summary

Illustration Summary

update

Messages

lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam.

CRITICAL ILLNESS - OPTIONAL BENEFITS

Optional Benefits - Initial default state

Benefit:	Client:	Options:	Rating:
<input type="checkbox"/> Return of premium on death ?			
<input type="checkbox"/> Return of premium on cancellation or expiry ?			
<input type="checkbox"/> Disability waiver ?			
<input type="checkbox"/> Loss of independent existence (LOIE) ?			
<input type="checkbox"/> Long term care conversion option ?			

Optional Benefits - Example of selected state (only one item selected)

Benefit:	Client:	Options:	Rating:
<input checked="" type="checkbox"/> Return of premium on death ?	<input checked="" type="checkbox"/> John Smith	- - - - -	- - - - -
<input type="checkbox"/> Return of premium on cancellation or expiry ?			
<input type="checkbox"/> Disability waiver ?			
<input type="checkbox"/> Loss of independent existence (LOIE) ?			
<input type="checkbox"/> Long term care conversion option ?			

Optional Benefits - Example of all optional benefits selected

any amounts/info associated with benefit is displayed in Illustration Summary

Benefit:	Client:	Options:	Rating:
<input checked="" type="checkbox"/> Return of premium on death ?	<input checked="" type="checkbox"/> John Smith	- - - - -	- - - - -
<input checked="" type="checkbox"/> Return of premium on cancellation or expiry ?	<input checked="" type="checkbox"/> John Smith	15 year option ▾	- - - - -
<input checked="" type="checkbox"/> Disability waiver ?	<input checked="" type="checkbox"/> John Smith	- - - - -	Standard ▾
<input checked="" type="checkbox"/> Loss of independent existence (LOIE) ?	<input checked="" type="checkbox"/> John Smith	- - - - -	- - - - -
<input checked="" type="checkbox"/> Long term care conversion option ?	<input checked="" type="checkbox"/> John Smith	- - - - -	- - - - -

When only one option in the drop down - exact styling TBD in visual design stage

☒ Return of premium on cancellation or expiry ?

John Smith

15 year option ▾

- - - - -

drop down is NOT functional - text is displayed normally (do not fade the text). Visual styling TBD.

CRITICAL ILLNESS - REPORT DESIGN

A Web Page

← → ↺

http://

☰

☰ Product Selector ▾

+ New

📁 Open

📄 View Report

💾 Save

💾 Save as

Lastest changes have not yet been saved...

📄

LOGO

[Contact](#) | [Francais](#)

Sign In

Sun Life Illustrations

Select Business Card:

Joanne Macloud ▾

[manage business cards](#)

PLAN DESIGN

SPREADSHEET

REPORT DESIGN

Sun Critical Illness Insurance: Illustration name here

rename

Designed for: ⓘ

Report Language: ☒ English ☐ French

if entered this appears on cover page

Client Report Options

☐ select all

☐ Cover Page

☐ Business Card Information

☐ Table of Contents

☐ Benefits of Sun CII

☒ Client Summary

☒ Plan Description

☒ Policy Values

☐ Premium Information

☐ Premium Summary ☐ Premium Details

☒ Important Illustration Notes

☐ Underwriting Requirements

View Client Report

Advisor Report Options

☐ Underwriting requirements

☐ Commission Summary

1st yr Override:

100%

View Advisor Report

Other Information

This is a link to a pdf

This is another link to a pdf

This is a web link

premium information is selected, 'premium details' is selected by default


☒ Premium Information

☒ Premium Summary ☐ Premium Details

CRITICAL ILLNESS - ILLUSTRATION SUMMARY

Adult

Illustration Summary


update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage

Term 10, to age 75

\$500,000

Person 1

Male, 35, non-smoker, Rated

Optional Benefits

Return of premium on death

cost

\$44.49

Return of premium on cancellation/expiry

cost

\$25.34

15 year

Disability waiver

cost

\$25.34

standard

Loss of independent existence (LOIE)

cost

\$25.34

rated


Long term care conversion option

cost

\$15.85

Conversion amount \$250,000


LTCI Weekly Benefit \$1250

Quick Compare 

☐ show

Juvenile

Illustration Summary


update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage

Term 10, to age 75

\$50,000

Person 1

Male, 16, non-smoker

Optional Benefits

Return of premium on death

cost

\$44.49

Return of premium on cancellation/expiry

cost

\$25.34


to age 35

Loss of independent existence (LOIE)

cost

\$0

included in all juvenile plans

Quick Compare 

☐ show


CRITICAL ILLNESS - QUICK COMPARE (Illustration Summary)

All examples include ROPC/E *** ROPC/E is only shown if it is selected as an optional benefit

Non-quick pay (Life pay)

1 Term 10, to age 75

Illustration Summary



update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage 1

Term 10, to age 75

\$500,000

[Person 1](#)

Male, 35, non-smoker, Rated

Optional Benefits

[Total Disability Waiver](#)

cost

\$25.34

[Long Term Care Conversion Option](#)


cost

\$15.85

Conversion amount \$250,000

LTCI Weekly Benefit \$1250

Quick Compare



☒ show

per month

per year

Term 10

15 years

*ROPC/E

\$123.45

\$33.00

\$2,300.45

\$396.00

Term 75

to age 75

*ROPC/E

\$405.02

\$34.00

\$4860.08

\$408.00

Lifetime

to age 100

*ROPC/E

\$462.09

\$41.12

\$5545.08


\$493.44

* ROPC/E amount is already included. Wording TBD

print quick compare

2 Term 75, to age 75

Illustration Summary



update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage 1

Term 75, to age 75

\$500,000

[Person 1](#)

Male, 35, non-smoker, Rated

Optional Benefits

[Total Disability Waiver](#)

cost

\$25.34

[Long Term Care Conversion Option](#)


cost

\$15.85

Conversion amount \$250,000

LTCI Weekly Benefit \$1250

Quick Compare



☒ show

per month

per year

Term 10

15 years

*ROPC/E

\$123.45

\$33.00

\$2,300.45

\$396.00

Term 75

to age 75

*ROPC/E

\$405.02

\$34.00

\$4860.08

\$408.00

Lifetime

to age 100

*ROPC/E

\$462.09

\$41.12

\$5545.08


\$493.44

* ROPC/E amount is already included. Wording TBD

print quick compare

3 Lifetime, to age 100

Illustration Summary



update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage 1

Lifetime, to age 100

\$500,000

[Person 1](#)

Male, 35, non-smoker, Rated

Optional Benefits

[Total Disability Waiver](#)

cost

\$25.34

[Long Term Care Conversion Option](#)


cost

\$15.85

Conversion amount \$250,000

LTCI Weekly Benefit \$1250

Quick Compare



☒ show

per month

per year

Term 10

15 years

*ROPC/E

\$123.45

\$33.00

\$2,300.45

\$396.00

Term 75

to age 75

*ROPC/E

\$405.02

\$34.00

\$4860.08

\$408.00

Lifetime

to age 100

*ROPC/E

\$462.09

\$41.12

\$5545.08

\$493.44


* ROPC/E amount is already included. Wording TBD

print quick compare

Quick pay

1b Term 10, to age 75

Illustration Summary



update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage 1

Term 75, 15 years

\$500,000

[Person 1](#)

Male, 35, non-smoker, Rated

Optional Benefits

[Total Disability Waiver](#)

cost

\$25.34

[Long Term Care Conversion Option](#)


cost

\$15.85

Conversion amount \$250,000

LTCI Weekly Benefit \$1250

Quick Compare



☒ show

per month

per year

Term 75

15 years

*ROPC/E

\$123.00

\$34.00

\$1476.00

\$408.00

Lifetime

10 years

*ROPC/E

\$222.00

\$41.12

\$2664.00

\$493.44

15 years

*ROPC/E

\$462.09

\$41.12

\$5545.08


\$493.44

* ROPC/E amount is already included. Wording TBD

print quick compare

1b Lifetime, 10 years

Illustration Summary



update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage 1

Lifetime, 10 years

\$500,000

[Person 1](#)

Male, 35, non-smoker, Rated

Optional Benefits

[Total Disability Waiver](#)

cost

\$25.34

[Long Term Care Conversion Option](#)


cost

\$15.85

Conversion amount \$250,000

LTCI Weekly Benefit \$1250

Quick Compare



☒ show

per month

per year

Term 75

15 years

*ROPC/E

\$123.00

\$34.00

\$1476.00

\$408.00

Lifetime

10 years

*ROPC/E

\$222.00

\$41.12

\$2664.00

\$493.44

15 years

*ROPC/E

\$462.09

\$41.12

\$5545.08


\$493.44

* ROPC/E amount is already included. Wording TBD

print quick compare

1b Lifetime, 15 years

Illustration Summary



update

Premium:

\$2,300.45/year

if premium frequency was set to monthly:

\$123.45

Plan Summary

Coverage 1

Lifetime, 15 years

\$500,000

[Person 1](#)

Male, 35, non-smoker, Rated

Optional Benefits

[Total Disability Waiver](#)

cost

\$25.34

[Long Term Care Conversion Option](#)


cost

\$15.85

Conversion amount \$250,000

LTCI Weekly Benefit \$1250

Quick Compare



☒ show

per month

per year

Term 75

15 years

*ROPC/E

\$123.00

\$34.00

\$1476.00

\$408.00

Lifetime

10 years

*ROPC/E

\$222.00

\$41.12

\$2664.00

\$493.44

15 years

*ROPC/E

\$462.09

\$41.12

\$5545.08

\$493.44

* ROPC/E amount is already included. Wording TBD

print quick compare

Term Specific Wireframe
Quick Compare

TERM - QUICK COMPARE (Illustration Summary)

Quick Compare ?

☒ show

	per month	per year
Term 10	\$123.45	\$2,300.45
Term 15	\$405.02	\$4860.08
Term 20	\$462.09	\$5545.08
Term 30	\$496.54	\$5958.48

print quick compare

General Wireframes

(apply to more than one product)

Rename Illustration

Loading report

GENERAL - RENAME ILLUSTRATION (default)

1. user presses "rename" button

PLAN DESIGNSPREADSHEETREPORT DESIGN

Sun Critical Illness Insurance: Illustration name here

rename

Client

Person 1

First Name: Person 1

Last Name:

Male

Female

Age: 35

or

Birth Date: dd / mm / yyyy

Smoker: No Yes

Client Ratings: Include ?

About Critical Illness

• Lorem ipsum

• Consectetur adipiscing elit

• Duis aute irure dolor

link 1...

link 2...

Illustration Summary

refresh

2a. Illustration name becomes editable (input text box), "rename" button now functions as "save".

PLAN DESIGNSPREADSHEETREPORT DESIGN

Sun Critical Illness Insurance:

Illustration name here

x

save

About Critical Illness

• Lorem ipsum

OR

2b. Use dialogue box that we are using in the Open Illustrations screen.

Rename Illustration

Illustration name: current illustration name

x

SaveCancel

GENERAL - RENAME ILLUSTRATION (open illustrations)

1. select item, press "rename"

Saved Illustrations

Search

Illustration Name:

Last Name:

Product: All

Advisor: all

Search

<input type="checkbox"/>	Illustration Name ▼	First Name ▼	Last Name ▼	Date ▼	Product ▼	Advisor ▼
<input checked="" type="checkbox"/>	enterTitleHere	Tricia	Ball	16/02/2013	Sun PAR Light	John Smithson
<input type="checkbox"/>	thisIsA_title_name	Jenn	Jane	07/02/2014	Sun PAR Light	John Smithson
<input type="checkbox"/>	tKerr743	Trevor	Kerr	01/02/2014	Sun PAR Light	Tammy Bender
<input type="checkbox"/>	naming_Convention	Paula	Simon	29/01/2014	Sun PAR Light	Charles Wright
<input type="checkbox"/>	file Name 123	Carla	Nitankowasaki	22/01/2014	Sun PAR Light	Mike Regeir
<input type="checkbox"/>	default name	Riley	Peterson	16/01/2014	Sun PAR Light	Mike Regeir
<input type="checkbox"/>	Untitled3	Jorge	J. D'jorges	15/01/2014	Sun PAR Light	Charles Wright
<input type="checkbox"/>	walterWhite	Walter	White	06/01/2014	Sun PAR Light	Natasha W. France
<input type="checkbox"/>	rEmilyWhitestone_1mil	Emily R.	Whitestone	22/12/2013	Sun PAR Light	Charles Wright
<input type="checkbox"/>	FreiheitNancy	Nancy	Freiheit	19/12/2013	Sun PAR Light	Charles Wright

10

Displaying 34 of 40 items

Results per page

Navigation icons

Rename

Open

Assign

Delete

Done

add "rename" button

2a. dialogue opens with current illustration info (same as "save as" dialogue), including current name of file

Rename Illustration

Illustration info:

Client name: Bob Smith

Created: March 25, 2013

Product: Sun Term

Illustration name:

current illustration name

x

Save

Cancel

OR

2b. dialogue opens (modified "save as" version)

Rename Illustration

Illustration name:

current illustration name

x

Save

Cancel

GENERAL - "LOADING" VIEW REPORT

