PAS ENHANCEMENTS

PAS Search

Highlighted search tab

Page Title

PAS   My Work   Customer   Billing   Policy   Quote   Reports

John Doe | Logout

Search   Help

🔍 Search PAS

Combined Policy/Quote search

Default to Policy/Quote when user clicks on Policy, Quote or Search links in the header. Otherwise, default to either Customer or Billing when user clicks on those in the header.

Search for: ○ Account   ○ Customer   ○ Billing   ● Policy/Quote

Enter one or more criteria

Policy/Quote #		First Name	Joe	Agent of Record	
Show in Results	Policies and Quotes ▼	Last Name	A	Agent #	
Product Type	All ▼	City		Agency Name	
Account #		State	AZ ▼	Agency #	
Billing Account #		Zip Code		Underwriting Company	
Customer #		Phone #		SSN	

All major product types

Product Type   Property ▼

All
Auto
Property
PUP

Search   Clear

Number of results shown

17 results found

Ability to sort results

Ability to filter results

Policy/Quote # ⇅	Product ⇅	Status ⇅	Eff. Date ⇅	Name ⇅	Address
QAZSS900056981	Auto Signature Series	Premium Calculated	04/26/2017	Joe Arbel	21819 N 31st Dr, Phoenix, AZ, 85027-1686
QAZSS900056796	Auto Signature Series	Premium Calculated	04/26/2017	Joe Arbel	21819 N 31st Dr, Phoenix, AZ, 85027-1686
AZSS900056803	Auto Signature Series	Policy Active	04/26/2017	Joe Arbel	21819 N 31st Dr, Phoenix, AZ, 85027-1686
QAZH3900056808	Homeowners Signature…	Gathering Info	02/20/2017	Joe Arbel	21819 N 31st Dr, Phoenix, AZ, 85027-1686
QAZSS900056947	Auto Signature Series	Premium Calculated	04/26/2017	Joe Acevedo	4715 E Cactus Rd, Phoenix, AZ, 85032-7725
QAZSS900056948	Auto Signature Series	Gathering Info	02/21/2017	Joe Acevedo	4715 E Cactus Rd, Phoenix, AZ, 85032-7725
NVH4900056876	Homeowners Signature…	Policy Pending	04/05/2017	Joe Acevedo	4715 E Cactus Rd, Phoenix, AZ, 85032-7725
AZH3900057145	Homeowners Signature…	Policy Expired	07/06/2017	Judy Fastlane	4800 Martinelli Ct, Las Vegas, NV, 89130
QPPAA900057167	Homeowners Signature…	Gathering Info	07/06/2017	Judy Fastlane	4800 Martinelli Ct, Las Vegas, NV, 89130
QCAAS900057036	California Auto	Gathering Info	08/11/2017	Stayce Bennet	2479 N Avenida Tabica, Green Valley, AZ,…

< 1 2 > 10 ▼

Configurable pagination

Prefill / Address Validation

PAS   My Work   Customer   Billing   Policy   **Quote**   Reports

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Quote #: QAZSS926231348   Eff. Date: 03/02/2017   Trans. Eff. Date: 03/02/2017

Prefill   General   Driver   Rating Detail Reports   Vehicle   Forms   Premium & Coverages   Driver Activity Reports   Documents & Bind

📄 Notes/Alerts

Prefill

Please verify that the imported customer information is correct, validate the address and click "Order Prefill".

First Name *   Mike

Middle Name

Last Name *   Stern

Address Type *   Current

Zip Code *   85053-1738

Address Line 1 *   3037 W Michigan Ave

Address Line 2

City *   Phoenix

State *   AZ

Address Validated?   No   Validate Address   Use Other Address

Date of Birth ❓*   07/07/1970 📅

Policy State *   AZ

Order Prefill

Save   Save and Exit   Cancel   Continue

Address validation indicator

Validate address once to push it to verified address book

Ability to reuse already validated addresses from the address book

Driver - Activity Information

Activity Information

Activities

Major Violation — 09/18/2012   Edit ⛔ Remove

[Add Activity]

Activity Type * | Major Violation ▾ |

Occurance Date ❓ * | 09/18/2012   📅 | ●———————— Simplify activity capture for quote

Rating Detail Reports - Disclaimers

Rating Detail Reports

Customer must be read the following Fair Credit Reporting Act (FCRA) notice:

"In connection with this application, we may review your credit report or obtain or use a credit-based insurance score based on the information contained in that credit report. We may use a third-party in connection with the development of your insurance score. We use this information to predict the probability of future losses and to help rate your insurance policy. By more accurately anticipating claims, we can better control risk, enabling us to offer insurance coverage to our policy holders at a more competitive cost. A statement explaining how AAA uses insurance scores is available upon your request."

Customer understands and agrees to the terms above: ○ Customer Agrees ◉ Customer Disagrees

Sales Agent, please read and agree to the following disclaimer in order to order the selected report(s):

The Federal Fair Credit Reporting Act, Driver's Privacy Protection Act, analogous state laws, and other state and federal laws govern the use of reports delivered via the Exigen application. It is your responsibility to ensure that your requests are lawful. When ordering reports for underwriting purposes, you must have a completed application and/or the verbal request of the subject consumer.

The Federal Fair Credit Reporting Act imposes criminal penalties - including a fine, up to two years in prison, or both - against anyone who knowingly and willfully obtains information on a consumer from a consumer reporting agency under false pretenses, and other penalties for anyone who obtains such consumer information without a permissible purpose.

I understand and agree to the terms above: ○ I Agree ◉ I Disagree

Membership ?

Select

◉ Yes ○ No

Current Carrier ?

Insurance Score ?

Select

◉ Yes ○ No ○ Declined

Order Reports

Move disclaimers to top of page.

Add link to Current Carrier Report

Named Insured - Contact Information

List of Insured Principal

Mike Stern   View Details   Remove

Joana Stern   View Details   Remove

[Add Insured]

First Named Insured ❓ *   [Mike Stern   ▾]

Named Insured Information

Prefix   [▾]

First Name *   [Mike   ]

Middle Name   [   ]

Last Name *   [Stern   ]

Suffix   [▾]

Social Security Number   [   ]

Base Date ❓ *   [04/13/2017   📅]

Address Type *   [Residential   ▾]

Zip Code *   [85053-1738   ]

Address Line 1 *   [3037 W Michigan Ave   ]

Address Line 2   [   ]

City *   [Phoenix   ]

State *   [AZ   ▾]

Has lived here for less than three years?   ○ Yes   ● No

Is residential address different from mailing address? ○ Yes   ● No

Home Phone Number   [   ]

Work Phone Number   [   ]

Mobile Phone Number   [(789) 654-1234   ]

Preferred Phone #   [Mobile Phone   ▾]

Email   [mike.stern@email.com   ]

Residence *   [Own Home   ▾]

[Validate Address]

Eliminate ability/need to capture separate Address/Phone/Residence information for other than the First Named Insured (to match Home product)
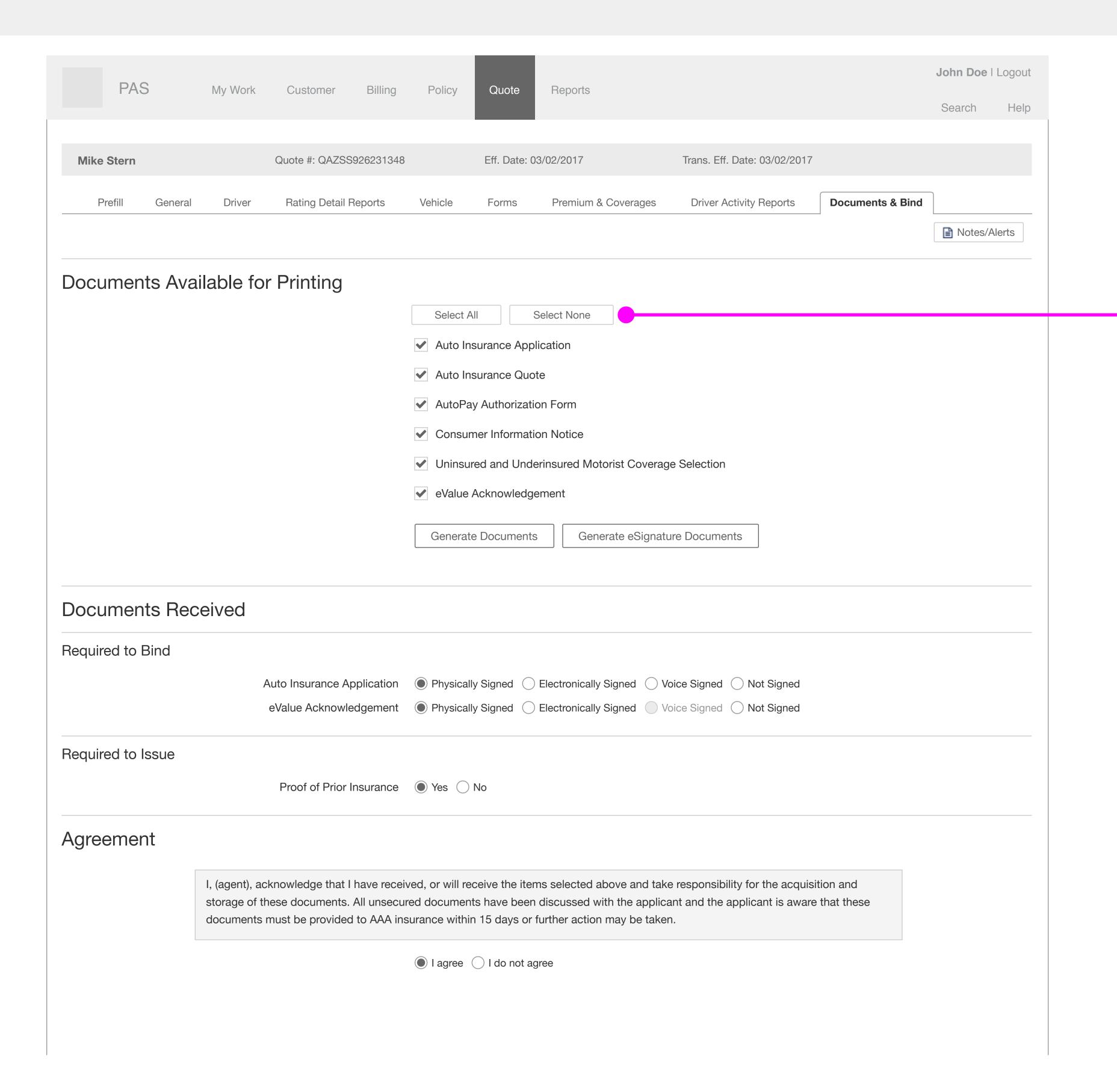
Vehicles - Garaging Zip

Garaging Address

Is Garaging different from Residential? ◉ Yes ○ No

Zip Code * | 85053-1738 |●────────────────── Only require Zip code to quote
Garaged elsewhere, rather than
full address. (Will still need full
address to bind)

Address Line 1 | 3037 W Michigan Ave |

Address Line 2 | |

City | Phoenix |

State | AZ ▼ |

Premium & Coverages

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Mike Stern
» Vehicle 2003, HONDA, ACCORD   » Driver Mike Stern

Quote #: QAZSS926231348

Eff. Date: 03/02/2017

Trans. Eff. Date: 03/02/2017

Total Term Premium
$1,977.00

Prefill   General   Driver   Rating Detail Reports   Vehicle   Forms   **Premium & Coverages**   Driver Activity Reports   Documents & Bind

Notes/Alerts

eValue Discount ⊘

ⓘ The customer is eligible for the eValue discount, but the following items need to be completed in order to bind:
- Enrollment in paperless notifications for policy and billing documents
- Pay in full with any payment method or enroll in AutoPay with a checking/savings account or debit card
- Maintain continuous insurance coverage and bodily injury limits of at least <$50,000/$100,000>
- Agree to and sign the eValue acknowledgement

Apply eValue Discount   ● Yes   ○ No

Coverages and Premium Detail

Coverages from Prefill ⊘

No results found.

Policy Options

ⓘ To keep the eValue discount, the customer must choose AutoPay to make recurring payments via a checking/savings account or debit card.

Payment Plan * | Eleven Pay - Standard ▼ |

Policy Term * | Annual ▼ |

▾ Payment Plans

Plan	Premium	Minimum Down Payment	Installment Amount (w/o fees)	# of remaining insrtallments
Annual	$1,750.00	$1,750.00	$0.00	0
Eleven Pay - Standard	$1,977.00	$539.00	$288.00	10
Eleven Pay - Zero Down	$1,750.00	$0.00	$398.00	10
Quarterly	$1,874.00	$468.50	$468.50	3

ⓘ Installment Amount does not include transaction fees. View applicable fee schedule.

Persistent Total Premium at the top
(When calculated)

Payment Plans are useful, but hard to find.
Suggest making more visible, possibly move up
closer to Payment Plan dropdown.
(They have their own page in Progressive)

Documents & Bind

My Work   Customer   Billing   Policy   **Quote**   Reports

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Mike Stern   Quote #: QAZSS926231348   Eff. Date: 03/02/2017   Trans. Eff. Date: 03/02/2017

Prefill   General   Driver   Rating Detail Reports   Vehicle   Forms   Premium & Coverages   Driver Activity Reports   **Documents & Bind**

📄 Notes/Alerts

Documents Available for Printing

[Select All]   [Select None] ●──────────────────── Select All / Select None options to improve productivity

☑ Auto Insurance Application

☑ Auto Insurance Quote

☑ AutoPay Authorization Form

☑ Consumer Information Notice

☑ Uninsured and Underinsured Motorist Coverage Selection

☑ eValue Acknowledgement

[Generate Documents]   [Generate eSignature Documents]

Documents Received

Required to Bind

Auto Insurance Application   ● Physically Signed   ○ Electronically Signed   ○ Voice Signed   ○ Not Signed

eValue Acknowledgement   ● Physically Signed   ○ Electronically Signed   ○ Voice Signed   ○ Not Signed

Required to Issue

Proof of Prior Insurance   ● Yes   ○ No

Agreement

I, (agent), acknowledge that I have received, or will receive the items selected above and take responsibility for the acquisition and storage of these documents. All unsecured documents have been discussed with the applicant and the applicant is aware that these documents must be provided to AAA insurance within 15 days or further action may be taken.

● I agree   ○ I do not agree

Style Guide Improvements

Action button styles

Tables and Lists

Standardize icons

Consistent Field Labels, Terminology Across Products

Property

Auto