



PAS ENHANCEMENTS

PAS Search

Page Title

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.

All major product types

Product Type

Number of results shown

Ability to filter results

PAS

My Work

Customer

Billing

Policy

Quote

Reports

John Doe | Logout

Search

Help

Q Search PAS

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

Search

Clear

17 results found

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

Highlighted search tab

Ability to sort results

Configurable pagination

Prefill / Address Validation

PAS

My Work

Customer

Billing

Policy

Quote

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Search

Help

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						
<input checked="" type="radio"/> Yes <input type="radio"/> No						

Current Carrier ?

Insurance Score ?

Select						
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> 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

Emailmike.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 *	<input type="text" value="85053-1738"/>
Address Line 1	<input type="text" value="3037 W Michigan Ave"/>
Address Line 2	<input type="text"/>
City	<input type="text" value="Phoenix"/>
State	<input type="text" value="AZ"/>

Only require Zip code to quote Garaged elsewhere, rather than full address. (Will still need full address to bind)

Premium & Coverages

PAS

My WorkCustomerBillingPolicyQuoteReports

John Doe | Logout

SearchHelp

Mike Stern

Quote #: QAZSS926231348

Eff. Date: 03/02/2017

Trans. Eff. Date: 03/02/2017

Total Term Premium
\$1,977.00

PrefillGeneralDriverRating Detail ReportsVehicleFormsPremium & CoveragesDriver Activity ReportsDocuments & 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

PAS

My Work

Customer

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Policy

Quote

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Help

Mike Stern

Quote #: QAZSS926231348

Eff. Date: 03/02/2017

Trans. Eff. Date: 03/02/2017

Prefill

General

Driver

Rating Detail Reports

Vehicle

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Driver Activity Reports

Documents & Bind

Notes/Alerts

Documents Available for Printing

Select All

Select None

☒ 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

Select All / Select None options to improve productivity

Style Guide Improvements

UI Elements – Buttons

Primary buttons

	Default	Text: 14px #FFF Border: #1778D3 1px Border radius: 2px Background: #1778D3
	Hover	Text: 14px #FFF Border: #2685DE 1px Border radius: 2px Background: #2685DE
	Down	Text: 14px #FFF Border: #015EB6 1px Border radius: 2px Background: #015EB6
	Disabled	Text: 14px #CCC Border: #CCC 1px Border radius: 2px Background: #EBEBEB

Secondary buttons

	Default	Text: 14px #1778D3 Border: #1778D3 1px Border radius: 2px Background: #FFF
	Hover	Text: 14px #73B6F5 Border: #73B6F5 1px Border radius: 2px Background: #FFF
	Down	Text: 14px #015EB6 Border: #015EB6 1px Border radius: 2px Background: #B9D6F2
	Disabled	Text: 14px #CCC Border: #CCC 1px Border radius: 2px Background: #EBEBEB

Tertiary buttons

	Default	Text: 13px #5F6062 Border: #CCC 1px Border radius: 2px Background: #FFF
	Hover	Text: 13px #CCC Border: #CCC 1px Border radius: 2px Background: #FFF
	Down	Text: 13px #767676 Border: #CCC 1px Border radius: 2px Background: #EBEBEB
	Disabled	Text: 13px #CCC Border: #CCC 1px Border radius: 2px Background: #EBEBEB

Primary buttons denote the main action user can perform on the page. As much as possible, only one primary button should be used on the page.

Secondary buttons let users perform other important actions on the page. There can be more than one secondary button on the page.

Tertiary buttons let users perform less important and less frequent actions on the page. There can be more than one tertiary button on the page. Tertiary buttons can

Action button styles

UI Elements – Data Tables

Simple table with title and header row

General Information						
Quote/Policy #	Agent/Agency	Effective date	Expiration date	Cancellation effective date	Last modified	Policy type
QAZ58926321299	880-959NY-02 Agencies Inc.	09/30/2016	09/30/2017		09/30/2017	Homeowners Signature Series

Table with form-fields

Detailed Vehicle Coverages		
2012, BMW, 320i	Vehicle Coverages	Term Premium
Comprehensive Deductible ⓘ	\$250 (+ \$0.00) ▾	\$823.00
Full Safety Glass ⓘ	No Coverage ▾	\$0.00
Special Equipment Coverage ⓘ	\$1,000.00 ▾	\$0.00
Collision Deductible ⓘ	\$500 (+ \$0.00) ▾	\$1,246.00
Rental Reimbursement ⓘ	No Coverage (+ \$0.00) ▾	\$823.00
Towing and Labor Coverage ⓘ	No Coverage (+ \$0.00) ▾	\$823.00
New Car Added Protection ⓘ	No Coverage ▾	\$823.00
Vehicle Coverage		\$2,069.00

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Tables and Lists

Iconography

Icons provided here were designed specifically for AAA applications. A sprite image of these icons at appropriate sizes will be made available.

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Standardize icons

Consistent Field Labels, Terminology Across Products

Property

PAS

My Work

Customer

Billing

Policy

Quote

Reports

Manage Tabs

Admin

Logout

Search

Help

JUDY FASTLANE

Quote # QAZH3900056813

Eff. Date: 02/07/2017

Trans. Eff. Date: 02/07/2017

» AAHOCredit Score Override

» AAHOInsurance Score Report

» AAADwell Entity Component 4715 E CACTUS RD, PHOENIX, AZ, US, 85032-7725

» Preconfig Location

General

Applicant

Reports

Property Info

Premiums & Coverages

Mortgagee & Additional interests

Underwriting & Approval

Documents

Bind

Notes/Alerts

List of named insureds

	First name	Last name	Relationship to primary named insured	Date of birth	
1	JUDY	FASTLANE	Primary Insured	02/03/1980 12:00 AM	Modify

1

10

Prefix

First name *

Middle name

Last name *

Suffix

Relationship to primary named insured *

Marital status *

Date of birth *

JUDY

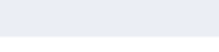
FASTLANE

Primary Insured

Single

02/03/1980

Auto



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[Policy](#)
[Quote](#)
[Reports](#)

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[Admin](#)
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[Help](#)

Toms Skujins

Quote # QAZSS900057074

Eff. Date: 07/31/2017

Trans. Eff. Date: 07/31/2017

[Insured Principal](#)

[Prefill](#)
[General](#)
[Driver](#)
[Rating Detail Reports](#)
[Vehicle](#)
[Forms](#)
[Premium & Coverages](#)
[Driver Activity Reports](#)
[Documents & Bind](#)

[Notes/Alerts](#)

List of Insured Principal

	First Name	Last Name	
1	Toms	Skujins	View/Edit Remove
2			View/Edit Remove

1

10

«

»

[Add Insured](#)

First Named Insured ? *

Toms Skujins

Named Insured Information

Prefix

First Name *

Middle Name

Last Name *

Suffix

Dwelling address

Zip code *

85032-7725

Street address 1 *

4715 E CACTUS RD

Street address 2

City *

PHOENIX

State *

AZ

Address validated

No

Retirement Community *

Validate Address

Address Type *

Residential

Zip Code *

85027-1686

Address Line 1 *

21819 N 31st Dr

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

Residence *

Own Home

Validate Address

Prefill

General

Driver

Rating Detail Reports

Vehicle

List of Vehicle

	Make	Model
1	NISSAN	MAXIMA