



The Future of Insurance Starts Here

Forms and Documents



AGENDA

- What are forms and documents
- Difference between Documents and Forms
- Document Mapping Template
- Understanding Form Revision / Edition
- Static and Variable Forms.
- Countrywide and State-specific Forms.
- Interline and LOB-specific Forms
- Manuscript Forms
- Form Categories
- Adding a Form
- Accessing Form through Sling repository
- Adding a Document



What are Forms and Documents

- When a customer does some policy transaction, may get hard copy of forms and documents.
- Forms
 - Gives listing of forms that are attached with the policy. Forms provide the definition of the coverage that are selected and apply to the policy.
- Documents
 - It is the complete document package where in everything will be there like documents, declaration, installment schedule, different types of custom documents, ISO forms, customer forms, proprietary form, everything you will get it in a single document.
 - Sample Document Package



Document
Packaging

Difference between Documents and Forms

- In Policy 2015, documents and forms are handled differently hence it is important to differentiate between them.

Documents	Forms
Documents are on a transition sheet where the insured gets information of all the coverage and the premiums that apply to the policy. e.g. Declaration Page, Worksheet, etc.	Forms provide the definition of the coverage that are selected and apply to the policy.
Documents do not appear on the Forms tab. Documents can be viewed from the Document Print Package.	Forms appear on the Forms tab.
Ordering of document is determined by the sequence in which they are added to the Document Print Package.	Ordering of Forms is controlled by a specific rule, e.g. Ordered by Form Name. Forms then appear in that specific order on the Forms Tab, Forms Schedule and in the Print Package.
When a new document is added, a new Document Print Package would need to be created.	When a new form is added, it would automatically reflect in the existing print package.
Documents are selected separately to be included in the Print Package as needed.	Forms are added to the Document Print Package as one entity.
Documents cannot be added or deleted manually.	Forms can be added or deleted manually.
Documents are automatically attached to the qualifying policy. Documents cannot be attached manually.	Forms can be attached to the qualifying policy either automatically or manually.

Document Mapping template

- BA's provide document mapping template which has information about list of forms and documents and their adoption details.
- Most of the columns in mapping template are same, however it may have some minor changes depending upon client. For example, columns like logo, signature, sharepoint etc. may not be required for each customer.



Microsoft Excel
Worksheet

Understanding Form Revision / Edition

- Policy 2015 is designed to handle multiple revision/edition of forms where, based on the effective date of the new revision adopted, the system will automatically attach this new revision/edition.
- A form can have multiple editions. The last four digits of the form denote the edition date of the form.
 - Example – for form CA20010306 and CA20011013, "0306" and "1013" are different editions of form CA2001. Edition date is entered as "Month-Year"(10-13)
- Document ID is a common link between different editions of the same form.
 - Example – forms CA20010306 and CA20011013 will have a document ID as CA-CA2001.

Conditions for attaching forms

- Form is applicable if
 - Edition date \leq effective date
 - Adoption date \leq effective date
 - Adoption date \leq Control date
 - Expiration date \geq Control date \geq adoption date
- Latest adapted version will apply to the policy.

Static and Variable forms

- A form in Policy 2015 can be either Static or Variable.
- **Static Form** – Typically, any form that does not need to map any data is configured as a Static Form.
 - Information/content of Static form remains same from one Policy to another.
 - To configure a Static form, "Static" indicator is checked for such forms.



Microsoft Word
Document

Static and Variable forms

- **Variable Form** – Typically any form that requires data to be mapped in addition to the content of the form is configured as a Variable Form.
 - Information printed on a variable form does change from one Policy to another and will map data specific to a given Policy.
 - On a Variable form, the data being mapped can be either system generated or user entered.
 - To configure a Variable form, "Static" indicator is left unchecked for such forms



Microsoft Word
Document



Microsoft Word
Document

Form and Supplement

State specific and countrywide forms

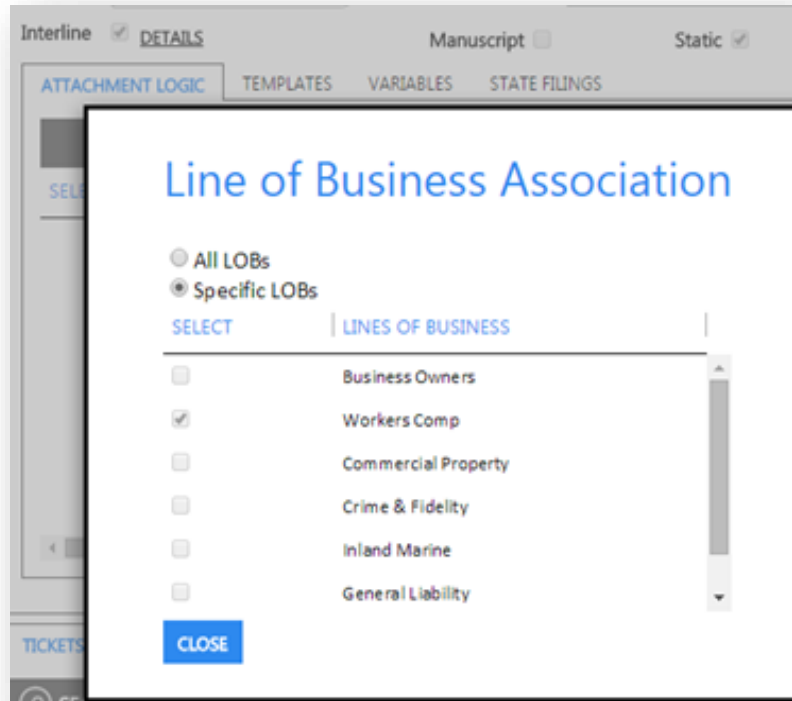
- A form in Policy 2015 can be either State-Specific or Countrywide.
- **State-Specific Form** – A form that is specific to a state is known as a state-specific form. In Cover-All Policy, a state-specific form will be available to attach (automatically or manually) when the state is added to the policy.
 - A state-specific form generally contains the name of the State in the description along with other information specific to that State in the schedule.
 - To configure a state specific form, under "State" dropdown appropriate state is selected.
- **Country Wide Form** - A form that applies to multiple states is known as a countrywide form. In Cover-All Policy, a countrywide specific form will be available to attach (automatically or manually) when any one of the applicable states is added to the policy.
 - Such forms will have information/content related to multiple states, which have adopted this form.
 - To configure a countrywide form, under "State" dropdown the "Countrywide" option is selected.

Interline and LOB specific forms

- A form in Cover-All Policy can be either Interline or LOB-Specific. Both of these forms can be static, variable, state-specific or countrywide.
- **Interline Form-** A form which applies to multiple Line of Business (LOBs) is known as an Interline form.
 - Example – IL00210306 is applicable for Commercial Auto, Commercial General Liability and Commercial Property. Form Name/ID starting with “IL” indicate that the form is an interline form.
 - Policy 2015 provides a capability of configuring a form as interline by providing a link to select the applicable Line of Business. Once configured through one LOB it's applicable to the other selected LOBs. Attachment criteria and Adoptions are defined for each LOB for which these forms are applicable.
 - To configure an Interline form, "Interline" checkbox is checked once it is selected, a “Detail” link appears for selecting the applicable Line of Business.

Interline and LOB specific forms

- **LOB-Specific forms** - Are applicable to a single line of business (LOB). When configured from the Line of Business, applies automatically only to the specific Line of Business.
 - To configure LOB specific forms, the “Interline” checkbox is unchecked for LOB specific forms.



The screenshot shows a software interface with a modal dialog box titled "Line of Business Association". The dialog has two radio buttons: "All LOBs" (unselected) and "Specific LOBs" (selected). Below the radio buttons is a table with two columns: "SELECT" and "LINES OF BUSINESS". The table lists several business types with checkboxes in the "SELECT" column. The "Workers Comp" row is checked. A "CLOSE" button is at the bottom left of the dialog. The background interface shows tabs for "ATTACHMENT LOGIC", "TEMPLATES", "VARIABLES", and "STATE FILINGS", and a top bar with "Interline" (checked), "DETAILS", "Manuscript" (unchecked), and "Static" (checked).

SELECT	LINES OF BUSINESS
<input type="checkbox"/>	Business Owners
<input checked="" type="checkbox"/>	Workers Comp
<input type="checkbox"/>	Commercial Property
<input type="checkbox"/>	Crime & Fidelity
<input type="checkbox"/>	Inland Marine
<input type="checkbox"/>	General Liability

Manuscript Forms

- Policy 2015 provide capabilities to add Manuscript Forms.
- Manuscript Forms are designed as blank templates to allow users to input language at the time of processing a quote or policy using Policy 2015.
- Users can give a custom form name, description, edition date and contents of a form using this template.
- This form uses User Variables to capture this information during runtime.
- The Manuscript Form template can be added with a standard header/footer and other needed boilerplate texts with blank areas for users to enter required information per policy.

Form Categories

- Policy 2015 allows displaying of forms in a desired order on the Forms Tab, Forms Schedule and Print Package.
- Forms must be assigned to any one of one of the following categories in Dev Studio:
 - Pre Form
 - Form
 - Post Form
- Ordering is always done in the following order: Pre Form, Form and Post Form:
 - Example – A form assigned to Pre Form category will be display on the forms Tab before all the forms in Form category. A form with Post-Form category will be displayed after all the forms in Forms category.
- Ordering rules can be applied to the categories via the Document Ranking Rules plug-in.
 - The Document Ranking Rules Plug-in is setup from the Products Tile when user logs into Dev Studio. Each form category can be defined using this plug-in.
 - Each form category defines the ordering rules that govern the forms ordering on the Forms Tab, Forms Schedule and Print package.
 - Example – Ordering rules that could be applied for the each form category as:
 - Order by State, Form Name.
- Thus, under each category forms will be ordered by State, Form Name.

Adding a form

- A form can be added to the policy if it is qualified for that policy.
- Also option which shows all forms, but not recommended.
- Forms are created using Dev Studio plugin for “Forms and Documents”
- You can retrieve forms & documents data from follow database tables
 - PS_DOCUMENT_TEMPLATE : Stores forms & document information
 - PS_DOCUMENT_ASSOCIATION : Stores form attachment logic.
- Forms and documents created for policies are stored in “sling” repository.
 - Path of sling repository:
 - For DEV STUDIO :
 - <https://<devstudio>/sling/dav/99>
 - For Policy2015
 - <https://<Policy2015>/sling/dav/99>
 - To access sling repository username/password: admin/admin
- Reference Link : <https://confluence.majesco.com/display/MPCL/Add+Forms>

Accessing Form through Sling repository

- Manual Attachment Form : CA23200310
- Checking in db: For DEV STUDIO (Source Environment)
select * from **ps_document_template** WHERE upper(pdt_description) like '%CA00011013%';
- Get the PDT_ID from this table and find in sling repository at below mentioned path (If PDT_ID = 8014286)

https://in-pn1x07ds0001.majesco.com/sling/dav/99/home/mic/mic%20docs/99/file%20cabinet/DOCUMENT%20TEMPLATE/8/0/1/4/2/8/6/8014286/

select * from **ps_document_association** where **pda_document_id=8014286;**

- For Policy2015 (Target Environment)
- select * from **ps_document_template** WHERE **upper(pdt_description)** like '%CA00011013%'; Get the **PDT_ID** from this table and find in sling repository at below mentioned path(If **PDT_ID** = 8018109)
- https://in-pn1x07ds0002.majesco.com/sling/dav/99/home/mic/mic%20docs/99/file%20cabinet/DOCUMENT%20TEMPLATE/8/0/1/8/1/0/9/8018109/

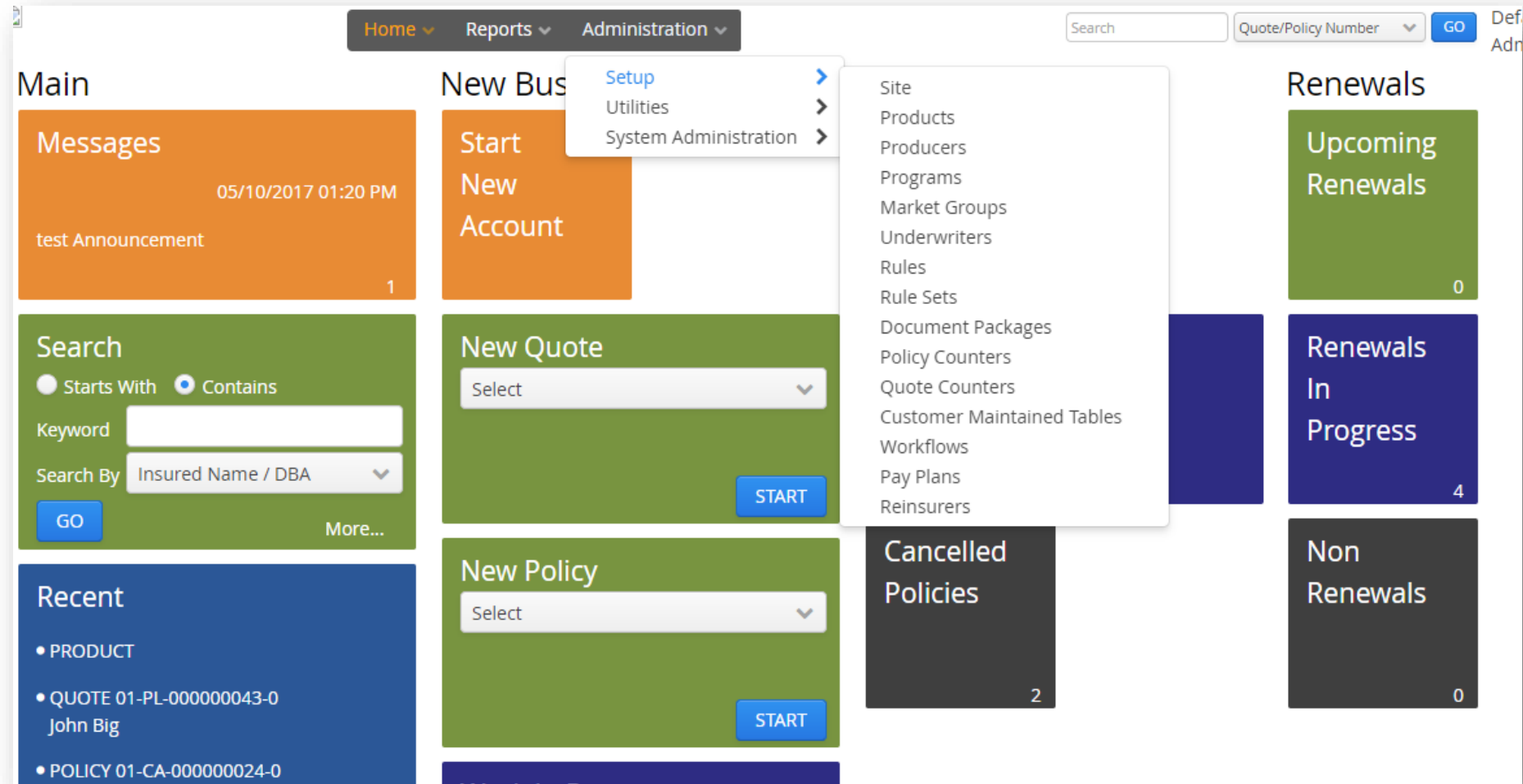
select * from **ps_document_association** where **pda_document_id=8018109;**

Document Package

- Document package is collection of forms & documents.
- *Document Package Management* page allows to set up templates to specify the types of transactions and forms that go into each document package for policies or quotes.
- Documents can be viewed from the Document Package folder on dashboard.
- Document packages are automatically attached to the qualifying policy. Documents cannot be attached or deleted manually.
- When a new document is added, a new Document Print Package would need to be created. We can use the Create Like functionality to create the new one but make sure expire the old document packages.
- Ordering of document is determined by the sequence in which they are added to the Document Print Package.
- Reference Link: <https://confluence.majesco.com/display/MPCL/Document+Packages>

Adding a document

- Open Target -> Setup -> Document Packages



Document Packages

https://in-pn1x07ds0001 x Cover-All Policy x

← → ↻ ⚠ Not secure | https://in-pn1x07ds0002.majesco.com/mic/pct#!navigate_to_admin_home/mic/admin/Setup.jsp?header_off=true&selectedSubTab=setupDocumentPackages ☆

Home ▾ Reports ▾ Administration ▾ Default Administrator

Document Package Management

Package Status

SEARCH < PREVIOUS 1 - 7 of 7 NEXT >

SELECT	NAME	DISPLAY NAME	DESCRIPTION	EFFECTIVE DATE	EXPIRATION DATE	CREATED BY	CREATION DATE	MODIFIED BY	MODIFICATION DATE
<input type="radio"/>	Quote Documents	Quote Documents	Quote Documents	01/01/2015 00:00	06/01/2020 00:00	admin	07/27/2016 16:34		
<input type="radio"/>	Policy Documents	Policy Documents	Policy Documents	01/01/2015 00:00	06/01/2020 00:00	admin	07/27/2016 16:36		
<input type="radio"/>	Quote Documents_1	Quote Documents_1	Quote Documents_1	01/01/2015 00:00	06/01/2020 00:00	admin	08/08/2016 09:59		
<input type="radio"/>	Policy Documents_1	Policy Documents-1	Policy Documents_1	01/01/2015 00:00	06/01/2020 00:00	admin	08/08/2016 10:00		
<input type="radio"/>	Policy Documents_CP	Policy Documents_CP	Policy Documents_CP	01/01/2015 00:00	06/01/2020 00:00	admin	08/09/2016 04:21		
<input type="radio"/>	Policy Documents_CP_+_Worksheet	Policy Documents_CP_+_Worksheet	Policy Documents_CP_+_Worksheet	01/01/2015 00:00	06/01/2020 00:00	admin	08/09/2016 04:30		
<input type="radio"/>	PL-Quote_Documents	PL-Quote_Documents	PL-Quote_Documents	01/01/2010 00:00	12/31/2099 00:00	admin	03/14/2017 09:48		



THANK YOU!

