

NJM INSURANCE GROUP

Quick Reference Guide-Adhoc Correspondence

Interactive Correspondence Editor-(ICE) & Inspire Interactive

Initial Draft

IT Enterprise Support

5/8/2019



Table of Contents

1. Purpose	2
2. Access Control & Security	2
3. Application Usage	2
3.1 Interactive Correspondence Editor – ICE	2
3.1.1 Title Section	3
3.1.2 Menu Bar	3
3.1.3 Letter Selection Section	4
3.1.4 Sections of ICE User Interface (UI)	4
3.2 Inspire Interactive	6
3.2.1 Info panel	6
3.2.2 Main Toolbar	6
3.2.3 Editor Tools	6
3.2.4 Tasks	7

Quick Reference Guide-Adhoc Correspondence

1. Purpose

The purpose of this document is to provide guidelines to access Interactive Correspondence Editor (ICE)/Inspire Interactive. This application is launched from Guidewire PC/BC and allows user to create, update, preview and publish Adhoc correspondence to meet business needs.

P.S: The contents of the document will be revisited based on technical updates and the detailed version will be documented in an upcoming training material that is being prepared.

The application has best user experience when launched in IE 11 (Chrome/Edge not currently supported).

2. Access Control & Security

User access to ICE application has to be requested to ACG with mention of appropriate AD Groups. Please complete following form for AD Group assignment.

http://enet.njmgroupp.com/Business%20Applications/BusinessForms/_layouts/FormServer.aspx?Xsnlocation=http://enet.njmgroupp.com/Business%20Applications/BusinessForms/FRM0047_ADGroupRequest/Forms/template.xsn&openIn=browser&SaveLocat

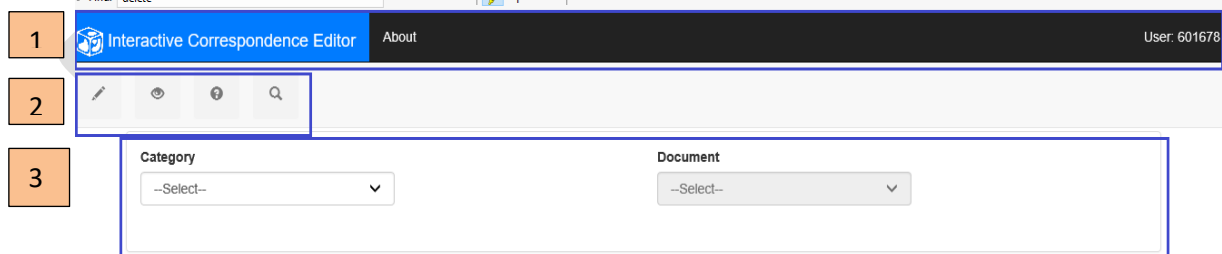
3. Application Usage

3.1 Interactive Correspondence Editor – ICE

User shall launch ICE application from Policy Center/Billing Center.

ICE home screen contains below:

1. Title Section
2. Menu Bar
3. Letter Selection Section
4. Sections of ICE User Interface



Quick Reference Guide-Adhoc Correspondence

Interactive Correspondence Editor
About
User: 601678

4

Blank Letter Template

Category

Blank Letter Templates ▼

Document

Blank Letter Template ▼

Addressee Information

Attention Name

--Select-- ▼

*** Addressee Name 1**

--Select-- ▼

*** Addressee Address**

--Select-- ▼

Output Profile Section

*** Printer**

--Select-- ▼

CC section

CC

☐

CC Name / Address

--Select-- ▼

--Select-- ▼

Add New

Remove

3.1.1 Title Section

Interactive Correspondence Editor
About
User: 601678

Name	Description
Screen Name	Name of the screen: Interactive Correspondence Editor.
About	Brief description on version of the application.
User ID	Windows user ID of the user.



3.1.2 Menu Bar

Below mentioned clickable buttons are available for user access in UAT and Production Environment(s).



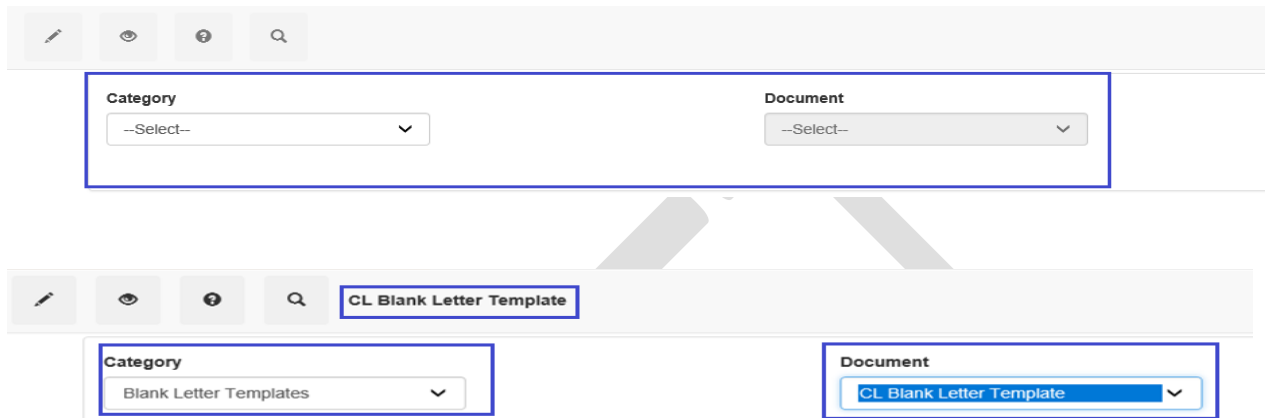
Icon	Name	Description
	Edit document	On Click, used to access Inspire Interactive application with ticket id. User can view, make updates, preview and publish document, as needed.
	Sample	On Click, used to open sample letter template with policy data and/or user entered data in PDF format.

Quick Reference Guide-Adhoc Correspondence

	Help	On click, used to access User Manual.
	Search Documents	On click, used to access Interactive Dashboard page.

3.1.3 Letter Selection Section

Letter is selected using Category and Document name listed and available from dropdown(s) below.



The first screenshot shows the initial state of the letter selection interface. It features a toolbar with icons for edit, view, help, and search. Below the toolbar, there are two dropdown menus: 'Category' and 'Document'. Both are currently set to '--Select--'.

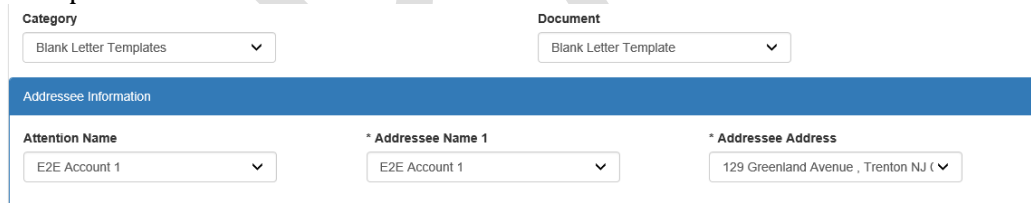
The second screenshot shows the state after a letter has been selected. The 'Category' dropdown is now set to 'Blank Letter Templates' and the 'Document' dropdown is set to 'CL Blank Letter Template'.

3.1.4 Sections of ICE User Interface (UI)

Once the letter is selected, below sections shall be displayed in ICE UI.

a. Addressee Information section

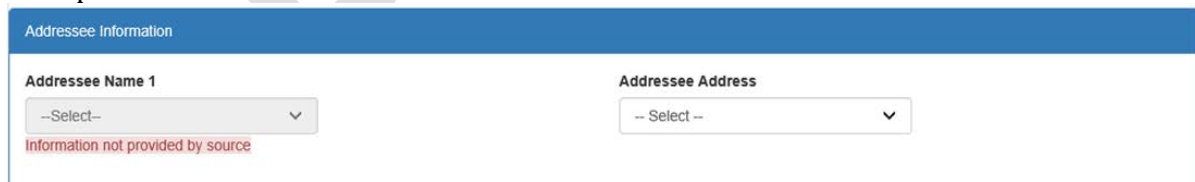
Example 1:



The screenshot shows the 'Addressee Information' section of the ICE UI. It contains three dropdown menus: 'Attention Name' (E2E Account 1), '* Addressee Name 1' (E2E Account 1), and '* Addressee Address' (129 Greenland Avenue, Trenton NJ).

*P.S: Mandatory Fields shall be marked with **

Example 2:



The screenshot shows the 'Addressee Information' section of the ICE UI. It contains two dropdown menus: 'Addressee Name 1' (set to '--Select--') and 'Addressee Address' (set to '-- Select --'). Below the 'Addressee Name 1' dropdown, the text 'Information not provided by source' is displayed in red.

P.S: "Information not provided by source" will be displayed when no PC data exists.

b. Output Profile section – Allows user to select output option like printer name or archive.

Quick Reference Guide-Adhoc Correspondence

Output Profile Section

* Printer

--Select--

Output Profile Section

* Printer

COLLECT3

c. Cc Section

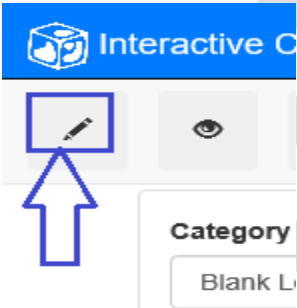
CC section

CC	CC Name / Address
<input type="checkbox"/>	<div>--Select--</div> <div>--Select--</div>

Add New

Remove

After entering all required information in this screen, user can click on the pen icon to navigate to “Inspire Interactive”.



Quick Reference Guide-Adhoc Correspondence

3.2 Inspire Interactive

Document Tickets are created from template(s) and edited according to defined tasks.

P.S: Inspire Interactive User Interface is being customized per company needs; hence, some buttons may not be enabled for day 1 implementation of the project.



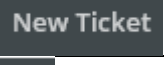



Below mentioned are different sections of Inspire Interactive:

1. Info Panel
2. Main Toolbar
3. Editor tools in Main Toolbar
4. Tasks

3.2.1 Info panel

This panel contains links to shortcuts and other buttons related to ticket handling.



Icon	Name	Description
	Help & Shortcuts	Provides Information on Shortcut keys to application with link to Inspire Interactive User Manual.
	Attachments	Used to attach documents to the ticket.
	Show History	Ticket Number Reference.
	Delete	Used to delete ticket.
	Publish Document	Used to publish letter.
	Close	Used to close application.

3.2.2 Main Toolbar

This tool bar provides accessibility to different parts of the document.

P.S: For details on buttons, please refer Inspire Interactive User Manual.



3.2.3 Editor Tools

Additional tools become viewable in main tool bar when user clicks on the editable portion of letter.

P.S: For details on buttons, please refer Inspire Interactive User Manual.



Quick Reference Guide-Adhoc Correspondence

3.2.4 Tasks

Tasks are interactive parts of the document. They can be activated by clicking the editable part of the letter or by clicking the corresponding task instruction in the Tasks Dialog box to the right.

3.2.4.1 Variable Data

The screenshot shows a letter template from NJM Insurance Group. The letterhead includes the NJM logo and company details. The date is April 30, 2019. The recipient address is E2E Account 1, 129 Greenland Avenue, Trenton NJ 08638-3627. The letter content includes a 'Re:' section with Policy No: 1100280551, Product Code: GLGM, and a 'Check No:' field. The 'Check No:' field is highlighted with a blue box. To the right, the 'Tasks Dialog Box' is open, showing a list of tasks: 'Check Number', 'Payment', 'Date Check Received', and 'Return Payment'. Each task has a checkbox and a dropdown arrow. The 'Check Number' task is selected, and its corresponding field in the letter is highlighted.

Tasks Dialog Box

Tasks	
<input type="checkbox"/> Check Number	<input type="checkbox"/> v
<input type="checkbox"/> Payment	<input type="checkbox"/> v
<input checked="" type="checkbox"/> Date Check Received	<input type="checkbox"/> v
<input type="checkbox"/> Return Payment	<input type="checkbox"/> v

P.S: Data when optional or not passed from upstream are seen as \$xxxxx\$. The same will not appear in previewed or published version.

In example above, Check Number can be entered by clicking the white box labeled "Check No:" in letter or by clicking upon the task in Tasks Dialog Box, the cursor will be taken to the appropriate location of the field.

Preview Sample:

E2E Account 1
129 Greenland Avenue
Trenton NJ 08638-3627

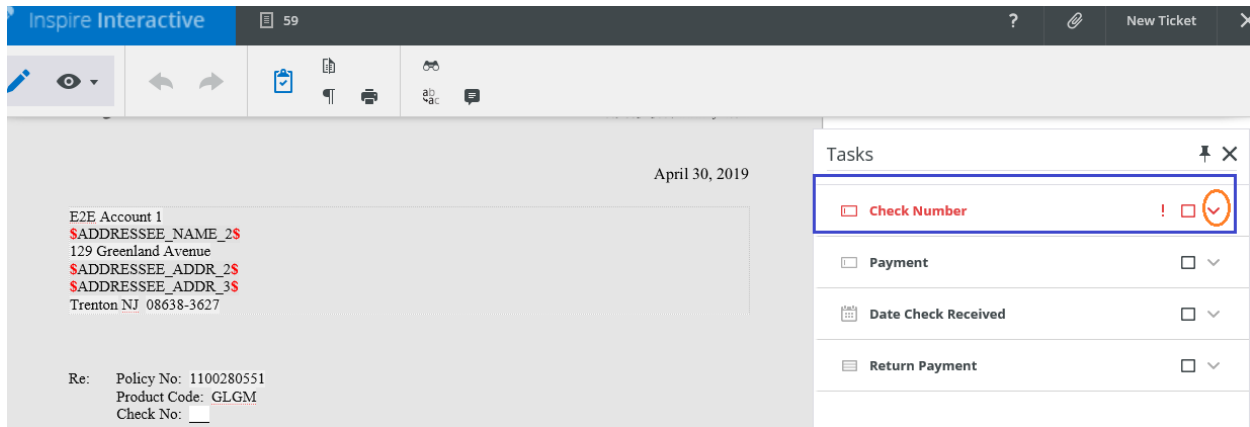
Re: Policy No: 1100280551
Product Code: GLGM
Check No: 4500

Dear Policyholder:

3.2.4.2 Mandatory Data Entry

If the field is mandatory per letter requirements, Tasks Dialog box will be shown as below to remind user to enter information.

Quick Reference Guide-Adhoc Correspondence



Inspire Interactive 59 ? New Ticket

April 30, 2019

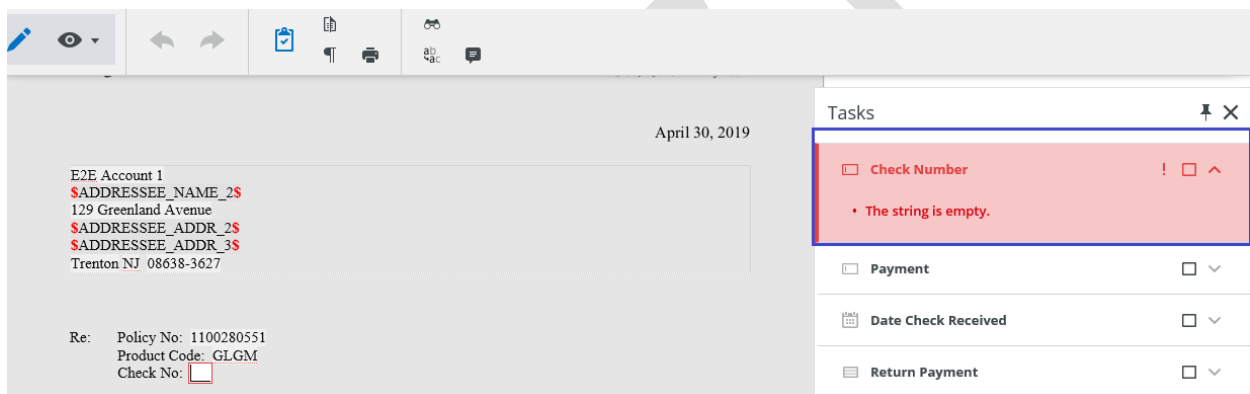
E2E Account 1
\$ADDRESSEE_NAME_2\$
129 Greenland Avenue
\$ADDRESSEE_ADDR_2\$
\$ADDRESSEE_ADDR_3\$
Trenton NJ 08638-3627

Re: Policy No: 1100280551
Product Code: GLGM
Check No:

Tasks

- ☒ Check Number ! ☒
- ☐ Payment ☐
- ☐ Date Check Received ☐
- ☐ Return Payment ☐

User can click down arrow “v” to look for additional information, as defined in requirements.



April 30, 2019

E2E Account 1
\$ADDRESSEE_NAME_2\$
129 Greenland Avenue
\$ADDRESSEE_ADDR_2\$
\$ADDRESSEE_ADDR_3\$
Trenton NJ 08638-3627

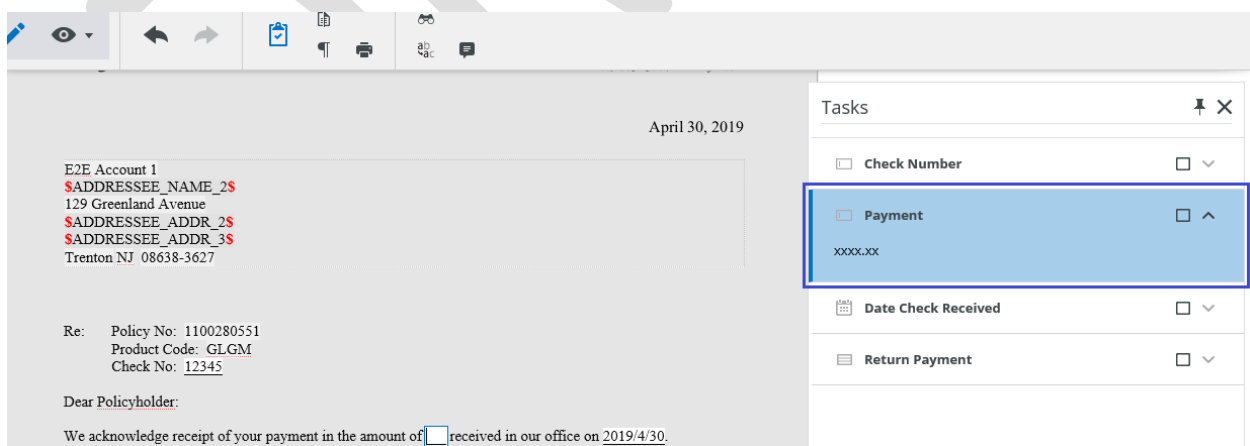
Re: Policy No: 1100280551
Product Code: GLGM
Check No:

Tasks

- ☒ Check Number ! ☐ ^
• The string is empty.
- ☐ Payment ☐
- ☐ Date Check Received ☐
- ☐ Return Payment ☐

3.2.4.3 Hint

If a hint is defined in letter, per requirements; the same will be displayed to user under the data item in Tasks Dialog box.



April 30, 2019

E2E Account 1
\$ADDRESSEE_NAME_2\$
129 Greenland Avenue
\$ADDRESSEE_ADDR_2\$
\$ADDRESSEE_ADDR_3\$
Trenton NJ 08638-3627

Re: Policy No: 1100280551
Product Code: GLGM
Check No: 12345

Dear Policyholder:

We acknowledge receipt of your payment in the amount of received in our office on 2019/4/30.

Tasks

- ☐ Check Number ☐
- ☒ Payment ☐ ^
xxxx.xx
- ☐ Date Check Received ☐
- ☐ Return Payment ☐

3.2.4.4 Format Validation

If validation exists for variable data entered, error or associated hint can be viewed from Tasks Dialog Box.

Quick Reference Guide-Adhoc Correspondence

The screenshot shows a form for 'E2E Account 1' with address fields and a 'Re:' section containing 'Policy No: 1100280551', 'Product Code: GLGM', and 'Check No: 12345'. The 'Dear Policyholder:' section contains a text field with 'abcd' and a date field with '2019/4/30'. A 'Tasks' dialog box is open on the right, showing a red error message for the 'Payment' task: 'Please Enter "xxxx.xx"' and 'The content has not passed a script validation.'.

3.2.4.5 Date Picker

User can update date using date picker. The user can also manually update date in date field but should be conscious of format (YYYY/MM/DD).

P.S: If the letter had specific requirement to format a date than that is visible for editing, formatting will be done during letter publishing and can also be seen in preview.

The screenshot shows the same form as above, but with a date picker open for the 'Date Check Received' task. The date picker shows the month of April 2019, with the 30th selected. The 'Tasks' dialog box is open on the right, showing the 'Date Check Received' task with the text 'Please select a date.'.

3.2.4.6 Optional Paragraph Insertion

Predefined text can be selectively inserted as mentioned in requirements as Optional Paragraphs. Optional Paragraphs will be available for user selection from Tasks Dialog box.

Quick Reference Guide-Adhoc Correspondence

E2E Account 1
\$ADDRESSEE_NAME_2\$
129 Greenland Avenue
\$ADDRESSEE_ADDR_2\$
\$ADDRESSEE_ADDR_3\$
Trenton NJ 08638-3627

Re: Policy No: 1100280551
Product Code: GLGM
Check No: 12345

Dear Policyholder:

We acknowledge receipt of your payment in the amount of 1234.78 received in our office on 2019/4/16.

If you have any questions, please contact the Cash Management Remittance Department at REMITPROC@NJM.com or 1-800-232-6600, extension 7420.

New Jersey Manufacturers Insurance Company
Cash Management Remittance Department

Enclosure(s)

001678

Tasks

- ☐ Check Number
- ☐ Payment
- ☐ Date Check Received
- ☒ Return Payment

Please Select One Option

- ☒ Select One
- ☐ Duplicate Payment
- ☐ Insufficient Deposit
- ☐ Incorrect Amount
- ☐ Return Payment No Signature
- ☐ Incorrect Payee
- ☐ Policy Paid in Full
- ☐ Customer Request
- ☐ Damaged Check
- ☐ Legal Line
- ☐ Illegible

Based on the selection option in Tasks Dialog Box, corresponding text will be displayed in letter. In example below, text defined in “Return Payment No Signature” Optional Paragraph is displayed to user in letter.

E2E Account 1
\$ADDRESSEE_NAME_2\$
129 Greenland Avenue
\$ADDRESSEE_ADDR_2\$
\$ADDRESSEE_ADDR_3\$
Trenton NJ 08638-3627

Re: Policy No: 1100280551
Product Code: GLGM
Check No: 12345

Dear Policyholder:

We acknowledge receipt of your payment in the amount of 1234.78 received in our office on 2019/4/16.

We are returning your payment because the check is not signed and therefore cannot be applied to your account. Please sign your check and return it or, if necessary, forward a replacement check or refer to the enclosure for various payment options.

If you have any questions, please contact the Cash Management Remittance Department at REMITPROC@NJM.com or 1-800-232-6600, extension 7420.

New Jersey Manufacturers Insurance Company
Cash Management Remittance Department

Enclosure(s)

001678

Tasks

- ☐ Payment
- ☐ Date Check Received
- ☒ Return Payment

Please Select One Option

- ☐ Select One
- ☐ Duplicate Payment
- ☐ Insufficient Deposit
- ☐ Incorrect Amount
- ☒ Return Payment No Signature
- ☐ Incorrect Payee
- ☐ Policy Paid in Full
- ☐ Customer Request
- ☐ Damaged Check
- ☐ Legal Line
- ☐ Illegible

3.2.4.7 Page Areas

Some documents contain multiple “Areas” where the letter section is divided into multiple parts.



Quick Reference Guide-Adhoc Correspondence

NJM Insurance Group
NEW JERSEY MANUFACTURERS INSURANCE COMPANY
301 Sullivan Way, West Trenton, NJ 08628
609-883-1300 / www.NJM.com

Date of Statement: 05/06/2019
Policy Number: 1100280478
Product Code: GLCT
Policy Date: 07/01/2019

To:

REMITTANCES RECEIVED AFTER THE DATE OF THIS STATEMENT NOT SHOWN					
Transaction Date	Policy Year	Transaction	Charge	Credit	Amount Due
Transactions continued on next page					

- User can click “Page Layout”  to select an “Area”.
- Or user can use the Area navigator to navigate between the Areas.
Area:  2/3
- The name of the Area is displayed after the Area navigator; for example “Transaction Record”, from image above.
- An Area may appear empty if the content is not selected or not applicable; for example if “Remittance” was not selected in ICE.

Example: Remittance unselected

(a) ICE UI

Remittance Indicator ☐

(b) Inspire Interactive UI

Remittance

Tasks

There is no task available.

Quick Reference Guide-Adhoc Correspondence

Example: Remittance selected

(a) ICE UI

Remittance Indicator ☒

(b) Inspire Interactive UI

Inspire Interactive 6. ? [icon] New Ticket [icon]

[icon] [icon] [icon] [icon] [icon] [icon] [icon] [icon]

Area: 3/3 [icon] Remittance

Please do not postdate your check and return bottom portion of this notice with your payment.

Please make checks payable to: New Jersey Manufacturers Insurance Company

Date of Notice	Policyholder	Policy Number	Policy Date
May 7, 2019	Brian Iamurri	1100280478	2019-07-01

FROM:	Past Due Amount	Installment Amount Due	Total Balance Due
Brian Iamurri \$INS_POL_HLD_NAME_2\$ 22 W. College Ave \$INS_POL_HLD_ADD_2\$ \$INS_POL_HLD_ADD_3\$ State College PA 16801			
	Due Immediately	2019/5/7	2019/5/7

New Jersey Manufacturers Insurance Company
General Liability
PO Box 70167
Philadelphia PA 19176-0167

☐ CHECK IF NEW ADDRESS.
(INDICATE NEW ADDRESS ON REVERSE SIDE.)

Tasks

<input type="checkbox"/> Past Due Amount	<input type="checkbox"/> v
<input type="checkbox"/> Installment Amount Due	<input type="checkbox"/> v
<input type="checkbox"/> Total Balance Due	<input type="checkbox"/> v
<input checked="" type="checkbox"/> Installment Due Date	<input type="checkbox"/> v
<input checked="" type="checkbox"/> Due Date	<input type="checkbox"/> v

3.2.4.8 Mark Task

User can mark task "Done" in Tasks Dialog box to keep track of updates.

- The box is not marked when the Task is used to update a field; the user can manually check the box.
- The box is automatically marked when a field has been updated directly within the document.
- The boxes do not need to be marked to complete the document; it is a visual reference only.

Checkbox to mark Task completion noted below:

Re: Policy No: 1100280551
Product Code: GLGM
Check No: 12345

Dear Policyholder:

We acknowledge receipt of your payment in the amount of 1234.78 received in our office on 2019/4/16.

The check was damaged in the mail. Refer to the enclosure for various payment options.


If you have any questions, please contact the Cash Management Remittance Department at REMITPROC@NJM.com or 1-800-232-6600, extension 7420.

New Jersey Manufacturers Insurance Company
Cash Management Remittance Department

Enclosure(s)

601678

Date Check Received ☐ v

Return Payment  ☐ ^

Please Select One Option

Mark as Complete

- ☐ Select One
- ☐ Duplicate Payment
- ☐ Insufficient Deposit
- ☐ Incorrect Amount
- ☐ Return Payment No Signature
- ☐ Incorrect Payee
- ☐ Policy Paid in Full
- ☐ Customer Request
- ☒ Damaged Check
- ☐ Legal Line
- ☐ Illegible

