

# QUEZONIAN EDUCATIONAL COLLEGE INC.

## PRC 101 – PRACTICUM OJT

Vel Joseph Kristoffer Deseo

Melvin Mar P. Cabie

James Oliver De Guzman

(Trainee OJT)

Ms. Angela Aragon

(Adviser)

## INTRODUCTION

## DOCUMENT OVERVIEW

This guide describes the screen functionalities of the Endorsement transaction. It contains (1) breadcrumb information how to navigate to the screen, (2) navigation and workflow steps, (3) common controls for tracker, navigation buttons, and summary information, and (4) usage information for the basic functions of screen objects and web components, together with their corresponding definition.

## SCR4104012– Endorsement – Process Endorsement Request Client

### SCREEN DESCRIPTION

SCREEN ID	SCR4104012
SCREEN LABEL	Endorsement – Process Endorsement Request Client
CALLED FROM	Inbox
MODULE	Marketing
MENU GROUP	Transaction

ABS

Integrated Insurance Brokerage System v6

Juan Dela Cruz

Home > Transaction > Endorsement > Create Endorsement > Process Endorsement

Transaction No. 9172

ENDORSEMENTS

EVENT LOGS

1 TRANSACTION

Endorsement Addition/Reduction in Coverage

Created By:  
Ms. Mary Ann M. Vassallo

Processed By:  
Ms. Mary Ann M. Vassallo

Inception Date

Expiry Date

Total Sum Insured  
P=IP 0.00

Description of Risk

Location of Risk

Internal Remarks  
Reduction in coverage premium

Amend General Info

Other Condition

2 CURRENT POLICY

3 COVERAGE SUMMARY

4 CREDIT MEMO

5 REQUEST FOR DOCUMENTATION

6 ATTACHMENT

PREVIOUS

SAVE

CLOSE

ENDORSEMENT REQUEST SUMMARY

Reference No.  
00000004-13

Endorsement Trans No.  
9172

Endorsement Type  
Reduction in Coverage/Premium

Policy No.  
GLTS972ComAdj\_CRG

Policy Trans No.  
48312

Assured/Policyholder  
Spouse Name04276 and Name04277 Axx

Insurer/Reinsurer  
(APC) ASIA INSURANCE (PHILIPPINES) CORP./

Insurance/ReType  
ACCIDENT - Group Personal Accident (OPA)

Coverage Period  
01/01/2022-12/31/2022

TB  
Php 1,000,000.00

Branch  
(H3) Head Office

Business Unit  
(EMP) Captive Individual Client

Marketing AD  
(MART) Axx/Mary Ann M. Vassallo

Processor  
Mary Ann M. Vassallo

Reviewer  
Sel Ubando

NEXT

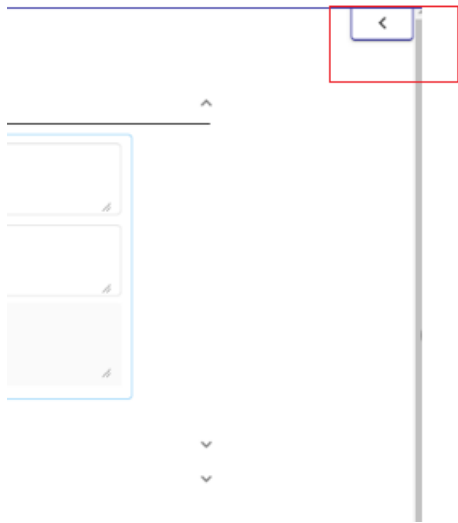


Figure 1: Button for Endorsement Request Summary

This button triggers to show the Slider for Endorse Request Summary

ENDORSEMENT REQUEST SUMMARY

>

Reference No

000106894-11

Endorsement Trans No

9172

Endorsement Type

Reduction in Coverage/Premium

Policy No

GLTEST21ComAdj\_CRG

Policy Trans No.

48312

Assured/policy Holder

Spouse Name04076 and Name04077 Axx

Insurer/Principal

(AIPC) ASIA INSURANCE (PHILIPPINES) CORPORAT

Insurance Line/Type

ACCIDENT - Group Personal Accident (GPA)

Coverage Period

01/01/2022-12/31/2022

TSI

Php 1,000,000.00

Branch

(HO) Head Office

Business Unit

(EMP) Captive Individual Client

Marketing AO

(MARY ANN)Mary Ann M. Vasallo

Processor

Mary Ann M. Vasallo

Reviewer

Sel Libunao

Figure 2: Endorsement Request Summary Panel

TRANSACTION

Endorsement Addition/Reduction in Coverage

Created By:  
**Ms. Mary Ann M. Vasallo**

Processed By:  
**Ms. Mary Ann M. Vasallo**

Inception Date  
8/17/2022

Expiry Date  
8/18/2022

Total Sum Insured  
PHP

1,250.00

Description of Risk

1

2

3

Location of Risk

1

2

3

Internal Remarks  
Reduction in coverage premium

Ammend General Info

Other Condition

Figure 3.1: Transaction Stepper (Endorsement Addition/Reduction in Coverage)

Ammend General Info

Original Policy Information

Amendments

Client

Policy Holder

Description Of Risk

Location of Risk

Inception Date

Expiry Date

Total Sum Insured  
PHP

0.00

Marketing AO

Profit Center

Account Referrer

Branch Section

Division/Group

Business Source

Mortgagee/ Obligor

Client

Policy Holder

Description Of Risk

Location of Risk

Inception Date

Expiry Date

Total Sum Insured  
PHP

0.00

Marketing AO

Profit Center

Account Referrer

Branch Section

Division/Group

Business Source

Mortgagee/ Obligor

Figure 3.2: Transaction Stepper (Ammend General Info)

Other Condition

Original Policy Information

Amendments

Account Referrer

Branch Section

Division/Group

Business Source

Mortgagee/ Obligor

Account Referrer

Branch Section

Division/Group

Business Source

Mortgagee/ Obligor

Figure 3.3: Transaction Stepper (Other Condition)

This is consisting of 3 Expansion Row (Endorsement Addition/Reduction in Coverage, Amend General Info, Other Condition).

**NOTE:** The Date Picker Input is disabled the input to avoid entering word or other invalid keywords. The Text Area Input height contains three-line words visible. All Disable forms has no outline in their forms. Input that has selection icon is disabled to select only the List-of-Data

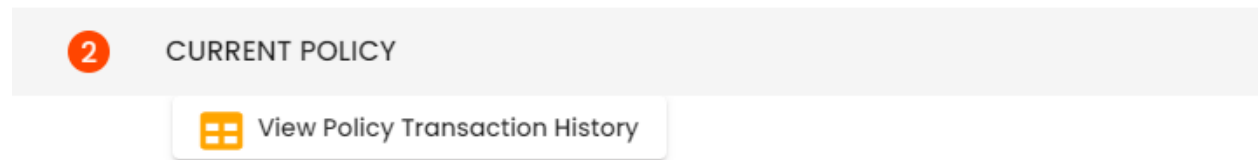


Figure 4: Current Policy (NO FUNCTION)

3

COVERAGE SUMMARY

Total Coverage Amount	0.00	Total Reductions Coverage Amount	0.00
Premium Amount	0.00	Premium Amount	0.00
Commission Amount	0.00	Commission Amount	0.00

POLICY COVERAGE SUMMARY

#	Coverage	Covered Amount	Endorsed Covered Amount	Net Covered Amount	Premium Rate	Premium Amount	Endorsed Premium Amount
1	M&A	100,000.00	0.00	100,000.00	22.0890000%	22,089.00	(6,626.70)

ADD ROW

No.	Coverage	Coverage Description	Net Covered Amount	Reduced Covered Amount	Net Premium Amount	Reduced Premium Amount	Net Commission	Reduced Commission	Remarks	
<div><div></div><div></div></div>	1	M&A	Murder and Assault Rider	1,000.00	6,666.00	1,500.00	8,888.00	1,350.00	2,322.50	
<div><div></div><div></div></div>	2	M&A	Velting lang boss	10.00	60.00	20.00	550.00	30.00	100.00	Sumobra bayad mo Vel
<div><div></div><div></div></div>	3	M&A	Test miko	70.00	700.00	30.00	320.00	52.00	30.00	Jack 123
<div><div></div><div></div></div>	4	M&A	Add Form	20.00	350.00	30.00	710.00	450.00	820.00	Debugging
<div><div></div><div></div></div>	5	M&A		12,500.00	3,420.00	2,120.00	242,340.00	2,115.55	34,220.00	test
<div><div></div><div></div></div>	6	M&A	tesyy	1,200.00	120.00	12,200.00	120.00	120.00	120.00	test

Figure 5: Coverage Summary Stepper and Grid (Melvin Mar Cabie)(SCR4104014)

The grid consists of following header:

- No.
- Coverage
- Coverage Description
- Net Covered Amount
- Reduced Covered Amount
- Net Premium amount
- Reduced Premium Amount
- Net Commission
- Remarks

Development of First Screen Design include “add” button allow the program to proceed “open dialog format”. (Encode Reduction/Addition in Coverage)



Figure 6 – Add Row Button

### Open Dialog Format

The Dialog Panel Consists of:

- Net Policy Coverage
  - Coverage
  - Coverage Description
  - Net Covered Amount
  - Net Premium Amount
  - Net Commission
- Reduction Coverage

In this section the user is allowed to specify/encode the reduction/addition in coverage.

  - Reduced Coverage
  - Reduced Coverage Description
  - Reduced Covered Amount
  - Reduced Premium Amount
  - Reduced Commission
- Remarks
  - Remarks

Encode Reduction/Addition in Coverage
SCREEN ID: 4104012

**Net Policy Coverage**

Coverage: \* ▼

Coverage Description

Net Covered Amount \* 0.00

Net Premium Amount \* 0.00

Net Commission \* 0.00

**Reduction Coverage**

Reduced Coverage

Reduced Coverage Description

Reduced Covered Amount \* 0.00

Reduced Premium Amount \* 0.00

Reduced Commission \* 0.00

Remarks

✓ CONFIRM

✕ CLOSE

Figure 7 – Open Dialog

Click the “Close” button to cancel the encoding of reduction/addition in coverage.

Click the “Confirm” button to complete the encoding of reduction/addition in coverage. The encoded coverage details will be display in the reduction coverage summary table.

### Column Header

The elements in this table may vary from the dialog panel from the “add row” button

Elements Containing are:

- Action (Delete button, Edit button)

Click the “Delete Icon” button to delete a selected row, upon clicking a Message will appear either “List Deleted Successfully” or “Error while Deleting the List”.

Click the “Edit Icon” button to open a dialog panel consists of dialog format as shown in Figure 7. Upon clicking the data entries of each data is being gathered and displayed from the input for specify/edit a value, clicking “Update” button a Message will appear “List Updated Successfully” if not no changes will appear on the update edit clicking “Cancel” button to cancel the update of reduction/addition in coverage.

Encode Reduction/Addition in Coverage
SCREEN ID: 4104012

**Net Policy Coverage**

Coverage: \* ▼

Coverage Description  
tesyy

Net Covered Amount \* 1,200.00

Net Premium Amount \* 12,200.00

Net Commission \* 120.00

**Reduction Coverage**

Reduced Coverage

Reduced Coverage Description

Reduced Covered Amount \* 120.00

Reduced Premium Amount \* 120.00

Reduced Commission \* 120.00

Remarks  
test

✓ UPDATE

✕ CANCEL

Figure 8 – Update Dialog



CREDIT MEMO

Credit Memo Summary

Credit Memo No.

0

Billing Date

Particulars

Total Sum Insured

PHP

0.00

Premium Amount

0.00

Total Charges

0.00

Gross A/R

PHP

0.00

Gross Unearned Income

0.00

Gross Commission

0.00

Net Commission

0.00

Output VAT

0.00

Gross A/R

0.00

Withholding Tax

0.00

Net Due

0.00

Account Type

A/R

Auto Debit Arrangement

ADA Enrolled?

☐

Creditable Value

(000.00)

Balance

0.00

Documentary Stamp

0.00

Premium Tax

0.00

File Service Tax

0.00

Local Government Tax

0.00

VAT

0.00

Other Charges

0.00

PREVIEW CREDIT MEMO

Mail To

Norman C. De Guzman

Use Address Of

Permanent

Billing

Location of Risk

Philippines

Permanent Address

Philippines

Mailing Address

Philippines

Figure 9: Credit Memo Stepper and Credit Memo Summary Expansion Row

Credit Memo consist of three expansion row(Credit Memo Summary, Apply Coverage Reduction(James Oliver De Guzman 1<sup>st</sup> Screen), Apply Reduction Summary(Vel Joseph Deseo 1<sup>st</sup> Screen))

Apply Coverage Reduction

APPLIED COVERAGE SUMMARY

#	Invoice No.	Coverage	Covered Amount	Premium Amount	Commission
1	1016903	M&A	0.00	(5,000.00)	(1,250.00)

UNAPPLIED COVERAGE SUMMARY

#	Coverage	Covered Amount	Premium Amount	Commission
1	M&A	0.00	(5,000.00)	(1,250.00)

ADD ROW

	No.	Invoice no.	Coverage	Coverage Description	Covered Amount	Endorse Covered Amount	Net Covered Amount	Premium Rate	Premium
	1	1016901				31,231.00			
	2	1016903				123,123.00			
	3	1016902		eqweqwe	1,231,231.00	231.00	231,231.00		13,113.00
	4	1016901		weqweqweqweqweqweqwe	3,453,453.00	3,123,123.00	78,978,978.00		45,345.00
	5	1016901	M&A	sdgvdgldgldgldg	12.31	311,232.00	3,123.12		1,311.00
	6	1016903	M&A	test	1,231,230.00	11,220.00	21.11		11,110.00
	7	1016901	M&A	Murder and Assault Rider	15,000.00	10,000.00	10,000.00		2.99

Figure 10: Apply Coverage Reduction Expansion Row(James Oliver De Guzman ) (SCR4104015)

Elements containing are:

- Action (Delete Button, Edit Button)
- No.
- Coverage
- Coverage Description
- Covered Amount
- Endorse Covered Amount
- Net Covered Amount

- Premium Rate
- Premium Amount
- Endorse Premium Amount
- Net Premium Amount
- Commission Rate
- Commission
- Endorse Commission
- Net Commission
- Remarks
- In the Credit Memo – Apply Coverage Reduction, by clicking the “Add Row” button allow the program to display the pop-up screen to apply coverage reduction to Valid Invoices

Apply Coverage Reduction

APPLIED COVERAGE SUMMARY

#	Invoice No.	Coverage	Covered Amount	Premium Amount	Commission
1	1016903	M&A	0.00	(5,000.00)	(1,250.00)

UNAPPLIED COVERAGE SUMMARY

#	Coverage	Covered Amount	Premium Amount	Commission
1	M&A	0.00	(5,000.00)	(1,250.00)

+

ADD ROW















	No.	Invoice no.	Coverage	Coverage Description	Covered Amount	Endorse Covered Amount	Net Covered Amount	Premium Rate	Premi
 	1	1016901				31,231.00			
 	2	1016903				123,123.00			
 	3	1016902		eqweqwe	1,231,231.00	231.00	231,231.00	13,113.00	
 	4	1016901		weqweqweqweqweqweqwe	3,453,453.00	3,123,123.00	78,978,978.00	45,345.00	
 	5	1016901	M&A	sdgvdgfdgfdg	12.31	311,232.00	3,123.12	1,311.00	
 	6	1016903	M&A	test	1,231,230.00	11,220.00	21.11	11,110.00	
 	7	1016901	M&A	Murder and Assault Rider	15,000.00	10,000.00	10,000.00	2.99	

Figure 11: Apply Coverage Reduction to Valid Invoices pop-up screen.

This show policy invoice coverage such as:

- Invoice No.
- Coverage
- Coverage Description
- Covered Amount
- Premium Amount
- Commission
- Reduced Covered Amount
- Reduced Premium Amount
- Reduced Commission
- Net Covered Amount
- Net Premium Amount
- Net Commission
- Premium Rate
- Commission Rate

**Apply Coverage Reduction to Valid Invoices** Screen ID: SCR4104018

Policy Invoice Coverage	Reduction Coverage	Net Coverage
Invoice No. *	Invoice No.	Invoice No.
Coverage *	Reduced Coverage	Net Coverage
Coverage Description *	Reduced Coverage Description	Net Coverage Description
Covered Amount * 0.00	Reduced Covered Amount * 0.00	Net Covered Amount * 0.00
Premium Amount * 0.00	Reduced Premium Amount * 0.00	Net Premium Amount * 0.00

CLOSE CONFIRM

Figure 12: Apply Coverage Reduction to Valid Invoices pop-up screen.

Under Reduction Coverage section, allowing user to apply reduction in coverage on a specific invoice and input remarks.

The screenshot shows a web application interface titled "Apply Coverage Reduction to Valid Invoices" with a screen ID of "SCR410401B". The interface is organized into three columns:

- Policy Invoice Coverage:** Contains a dropdown for "Invoice No. \*" (highlighted with a red border), a dropdown for "Coverage \*", a text field for "Coverage Description \*", and two numeric input fields for "Covered Amount \*" and "Premium Amount \*" both showing "0.00".
- Reduction Coverage:** This section is enclosed in a red rectangular border. It contains a dropdown for "Invoice No.", a dropdown for "Reduced Coverage", a text field for "Reduced Coverage Description", and two numeric input fields for "Reduced Covered Amount \*" and "Reduced Premium Amount \*" both showing "0.00".
- Net Coverage:** Contains a dropdown for "Invoice No.", a dropdown for "Net Coverage", a text field for "Net Coverage Description", and two numeric input fields for "Net Covered Amount \*" and "Net Premium Amount \*" both showing "0.00".

At the bottom right of the form, there are two buttons: a red "CLOSE" button with a close icon and an orange "CONFIRM" button with a checkmark icon.

Figure 13: Apply Coverage Reduction to Valid Invoices pop-up screen (close and confirm button).

By clicking the “Close” button allow user to cancel the application of coverage reduction to valid invoices.

By clicking the “Confirm” button allow user to complete the application of coverage reduction to valid invoices. Then the encoded coverage details will be display in the coverage reduction applied valid invoices table.

Apply Coverage Reduction to Valid Invoices

Screen ID: SCR4104D16

Policy Invoice Coverage

Reduction Coverage

Net Coverage

Invoice No. \*

Coverage \*

Coverage Description \*

Covered Amount \* 0.00

Premium Amount \* 0.00

Invoice No.

Reduced Coverage

Reduced Coverage Description

Reduced Covered Amount \* 0.00

Reduced Premium Amount \* 0.00

Invoice No.

Net Coverage

Net Coverage Description

Net Covered Amount \* 0.00

Net Premium Amount \* 0.00

CLOSE

CONFIRM

Figure 14: Apply Coverage Reduction to Valid Invoices Table.

Clicking the “Delete” icon to delete a selected row, upon clicking a message will appear either “List Deleted Successfully” or “Error While Deleting the List”.

Clicking the “Edit” icon to display the pop-up screen.

APPLIED COVERAGE SUMMARY						UNAPPLIED COVERAGE SUMMARY				
#	Invoice No.	Coverage	Covered Amount	Premium Amount	Commission	#	Coverage	Covered Amount	Premium Amount	Commission
1	1016903	M&A	0.00	(5,000.00)	(1,250.00)	1	M&A	0.00	(5,000.00)	(1,250.00)

ADD ROW

No.	Invoice no.	Coverage	Coverage Description	Covered Amount	Endorse Covered Amount	Net Covered Amount	Premium Rate	Premi
1	1016901				31,231.00			
2	1016903				123,123.00			
3	1016902		eqwqwe	1,231,231.00	231.00	231,231.00	13,113.00	
4	1016901		weqweqweqweqweqweqwe	3,453,453.00	3,123,123.00	78,978,978.00	45,345.00	
5	1016901	M&A	sdgvdgfdgfdg	12.31	31,232.00	3,123.12	1,311.00	
6	1016903	M&A	test	1,231,230.00	11,220.00	21.11	11,110.00	
7	1016901	M&A	Murder and Assault Rider	15,000.00	10,000.00	10,000.00	2.99	

Figure 15: Apply Coverage Reduction to Valid Invoices (Update Screen).

Clicking the “Cancel” button to cancel the application of coverage reduction to valid invoices.

Clicking the “Updated” button to update the application of coverage reduction to valid invoices. Then the encoded coverage details will be display in the coverage reduction applied valid invoices table, upon clicking the “UPDATE BUTTON” a message will appear ”List Update Successfully” if not “N/A”.

**Apply Coverage Reduction to Valid Invoices** Screen ID: SCR4104015

Policy Invoice Coverage	Reduction Coverage	Net Coverage
Invoice No. * 1016901	Invoice No. 	Invoice No. 
Coverage * M&A	Reduced Coverage 	Net Coverage 
Coverage Description * zxcvbnm	Reduced Coverage Description 	Net Coverage Description 
Covered Amount * 11,110.00	Reduced Covered Amount * 110.00	Net Covered Amount * 10.00
Premium Amount * 11,110.00	Reduced Premium Amount * 110.00	Net Premium Amount * 11.11

✖ CANCEL
✔ UPDATE

Figure 16: Apply Coverage Reduction to Valid Invoices Cancel and Update Button

Apply Reduction Summary ^

CREDIT MEMO SUMMARY

TSI	Premium Amount	Document Stamp	Premium Tax	FST	LGT	Billing Vat	Other Charges	Total Charges	Gross Amount	Gross Commission	Unearned Income
0.00	(5,000.00)	500.00	(1,104.45)	(0.00)	(0.00)	(0.00)	(0.00)	(1,604.45)	(6,604.45)	(1,250.00)	(0.00)

+ ADD DATA

	No.	Invoice No.	Document Stamp	Document Tax	FST	LGT	Billing VAT	Other Charges
	3	10050	241,000.00	1,201.00	23,213.00	124.00	1,246.00	1,246.00
	4	10025	212.00	120.00	2,012.00	1,212,120.00	21,212,121.00	121,110.00
	5	10050	210.00	230.00	321,221.21	256.66	2,540.00	2,650.00
	6	10075	12.22	22,220.00	222.22	23,330.00	212,120.00	22,220.00

Figure 17: Apply Reduction Summary (Vel Joseph Deseo) (SCR4104016)

This grid columns contains of the ff:

- No.
- Invoice No
- Document Stamp
- Document Tax

- FST
- LGT
- Billing VAT
- Other Charges

## Open Dialog Format

The Dialog Panel Consists of:

- Policy Invoice Coverage (DISPLAY ONLY)

- Invoice No.
- Valid Document Stamp
- Valid Premium Tax
- Valid FST
- Valid LGT
- Valid Billing VAT
- Valid Other Charges

- Reduction Summary

In this section the user is allowed to specify/encode the reduction/addition in coverage.

- Invoice No.
- Document Stamp
- Premium Tax
- FST
- LGT
- Billing VAT
- Other Charges

Trans. No. 123
Apply Reduction Summary to Valid Invoices
Screen ID: SCR4104018

Policy Invoice Coverage	Reduction Summary
Invoice No. *	Invoice No.
Valid Document Stamp	Document Stamp * 0.00
Valid Premium Tax	Document Tax * 0.00
Valid FST	FST * 0.00
Valid LGT	LGT * 0.00
Valid Billing VAT	Billing VAT * 0.00
Valid Other Charges	Other Charges * 0.00

SAVE
CANCEL

Figure 18 – Open Dialog

Click the “Close” button to cancel the encoding of reduction/addition in coverage.

Click the “Save” button to complete the encoding of reduction/addition in coverage. The encoded coverage details will be display in the reduction coverage summary table.

## Column Header

The elements in this table may vary from the dialog panel from the “add row” button

Elements Containing are:

- Action (Delete button, Edit button)

Click the “Delete Icon” button to delete a selected row, upon clicking a Message will appear either “List Deleted Successfully” or “Error while Deleting the List”.

Click the “Edit Icon” button to open a dialog panel consists of dialog format as shown in Figure 18. Upon clicking the data entries of each data is being gathered and displayed from the input for specify/edit a value, clicking “Update” button a Message will appear “List Updated Successfully” if not no changes will appear on the update edit clicking “Cancel” button to cancel the update of reduction/addition in coverage.



Trans. No. 123
Apply Reduction Summary to Valid Invoices
Screen ID: SCR4104016

Policy Invoice Coverage	Reduction Summary
Invoice No. *	Invoice No.
Valid Document Stamp	Document Stamp * 12.22
Valid Premium Tax	Document Tax * 22,220.00
Valid FST	FST * 222.22
Valid LGT	LGT * 23,330.00
Valid Billing VAT	Billing VAT * 212,120.00
Valid Other Charges	Other Charges * 22,220.00

UPDATE
CANCEL

Figure 19 – Update Dialog

## 5 REQUEST FOR DOCUMENTATION

Figure 20 – Request for Documentation Stepper (EMPTY)

## 6 ATTACHMENT

Figure 21 – Attachment Stepper (EMPTY)

## 7 ENDORSEMENT SUMMARY

Figure 22 – Endorsement Summary Stepper (EMPTY)



Figure 23 – Buttons in Lower part of Stepper

The Previous Button will previous the Stepper

The Next Button will next the Stepper

The Save Button allows to save the page (NOT WORKING)

The Close Button allows to close the page (NOT WORKING)

The Remarks Input, Remarks Input, and complete Button will show in the last Stepper