



User Guide | PUBLIC  
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# Coverage-based Insurance Apps User Guide

## SAP Quotation and Underwriting for Insurance 1.1

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# 1 Introduction

## 1.1 Getting Started

This section gives you the basic information for you to get started.

SAP Quotation and Underwriting for Insurance is a quotation and underwriting system that supports the policy lifecycle including application data capture, qualification, rating, quote management, bind, and issuance functionality. The FS-QUO component, which features a consolidated underwriting workplace and **Straight Through Processing** (STP), is powered by the FS-PRO component.

For information about the installation of SAP Fiori products, see the [Installation Guide](#). Since the installation process is common across all SAP Fiori apps, it only requires one installation.

For extensibility options, see the [Coverage-based Development Guide](#).

The applications (apps) for insurance services from SAP run on the SAP Fiori Launchpad. To log on to any app, go to the Fiori Launchpad and choose the tile for the transactional app that you want to use.

The following apps are available:

<b>Create Insurance Quote</b>	You can create an insurance quote, review quote pricing details, submit a quote for underwriting, and present it to a customer.
<b>Create Group Insurance Quote</b>	You can create a group insurance quote for a group of members, creating different plans for different groups of members, and review the group quote.
<b>Create Master Insurance Quote</b>	You can create a master insurance quote, and later create a multi-individual quote with it.
<b>Manage Issued Policies</b>	You can make changes to a policy after it has been issued.
<b>Create Insurance Quote from Master</b>	You can create a multi-individual quote with a master policy.
<b>My Insurance Worklist</b>	You can view submissions and issue policies that the agent created. Agents can also view or edit all quote options for a chosen submission, create multiple quote options for the same submission, and compare up to five quote options at a time.
<b>My Underwriting Worklist</b>	You can underwrite individual quotes, group quotes, and multi-individual quotes, examine and evaluate the application information and supporting documents, and then accept or decline a quote. For individual quotes specifically, you can also counteroffer an option of the submission before making underwriting decisions, and request for improvement for one or more options when necessary.
<b>My Insurance Tasks</b>	You can identify the difference between a standalone and a transaction task, retrieve the list of standalone or transaction tasks that were previously created, and create, update, or delete a standalone/transaction task.

## 1.2 Audience

This document is intended for users of the coverage-based FS-QUO Apps, who want to create insurance quotes, group quotes, and master quotes, and manage all insurance- and underwriting-related tasks and transactions.

## 1.3 Technical Specifications

This topic describes the technical requirements for the FS-QUO Apps.

### Browser Specifications

The FS-QUO client is browser-based. For information about supported browsers, see [Client System Requirements](#).

## 2 Using Create Insurance Quote

With the *Create Insurance Quote* transactional App, you can create an insurance quote in UI5 Fiori mobile and perform related procedures, such as reviewing quote pricing details, submitting it for underwriting, and presenting it to a customer.

### 2.1 Entering and Reviewing General Information

You need to enter the general information for the insurance quote, including the commission participant, sales product information, and policyholder information. Then you can review the information you entered.

#### Procedure

1. In the Fiori Launchpad, choose *Create Insurance Quote*.

The *Create Insurance Quote* screen appears.

2. Enter the information of the commission participant.

#### → Tip

You can use the ID, name or commission contract number to search for a commission participant.

- To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
- To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
- To refresh the information of the business partner after you update it, choose *Refresh*.

#### ⓘ Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

#### ⓘ Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing *Refresh* in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

3. Enter the information of the sales product.

- To create a quick quote, choose *Quick Quote* in the *Quote Type* field. You can convert a quick quote to a full quote later.

- To create a full quote, choose *Full Quote* in the *Quote Type* field.

4. Enter the information of the policyholder.

#### Note

If you choose *Quick Quote* as the quote type, the fields in this section become optional. But you still need to provide related information when you convert it to a full quote.

- To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
- To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
- To refresh the information of the business partner after you update it, choose *Refresh*.

#### Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

#### Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing *Refresh* in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

5. Choose *Save*.

- To cancel the operation, choose *Cancel*.

The *Create Insurance Quote* screen appears in read-only mode.

6. Review the general information and make sure all information is correct, and then choose *Next*.

#### Note

Not entering the policyholder information will result in the policyholder/ID on this screen displaying as `Anonymous`.

- To edit the general information again, choose *Edit*.

The *Continue* dialog box appears.

7. Choose *Continue*.

- To cancel the operation, choose *Cancel*.

If you're creating a quick quote, the *New Quick Quote* screen appears. If you're creating a full quote, the *Producer Application* screen appears.

## 2.2 Entering Quick Quote Data

On the *New Quick Quote* screen, you can enter the information of the quick quote.

### Prerequisites

- You have entered the general information for an insurance quote and selected *Quick Quote* as the *Quote Type*.
- You are on the *New Quick Quote* screen.

### Procedure

1. Choose a contract and a calculation rule type.

#### Note

The contract decides which calculation rule types are available. The calculation rule type decides which fields in the *Premium* and *Coverage Benefit* section are editable and required.

2. **Optional:** Select the *Smoker* checkbox for the insured person, if applicable.
3. Enter the investment premium or premium as required.
4. Enter the insured amount, or death benefit and endowment benefit as required.
5. Choose *Save*.

The quick quote data is saved.

## 2.3 Entering Full Quote Data

On the *Producer Application* screen, you can enter information for policy, contracts, insured risks, and risk coverage. You can also simulate underwriting to understand the risks of the quote.

### Prerequisites

- You have entered the general information for an insurance quote and selected *Full Quote* as the *Quote Type*.
- You are on the *Producer Application* screen.

## Procedure

1. On the left panel, add a policy by choosing **+** , and then choosing a policy in the *Add* dialog box.

### Note

This step only applies to the Commercial product. Skip this step for other products.

The policy item appears on the left panel.

2. Choose the policy item you just added from the left panel, then enter all mandatory information on the right panel.

3. Save your changes.

4. On the left panel, add a contract by choosing **+** , and then choosing a contract in the *Add* dialog box.

The contract item appears on the left panel.

5. Choose the contract item you just added from the left panel, then enter all mandatory information on the right panel.

- a. In the *Calculation Rule Type* list, choose a calculation rule type.
- b. In the *Tax Characteristics* section, choose a tax payer information and premium tax scope.
- c. In the *Premium Payer* section, add a premium payer.
- d. **Optional:** In the *Beneficiary* section, add a beneficiary.
- e. **Optional:** In the *Creditor* section, add a creditor.

### Note

When adding the premium payer, beneficiary, or creditor, you can update the business partner or refresh the business partner information after updating it.

6. Save your changes.

7. On the left panel, add a coverage by choosing the contract item, choosing **+** , and then choosing a coverage in the *Add* dialog box.

The coverage item appears on the left panel.

8. Choose the coverage item you just added from the left panel, then enter all mandatory information on the right panel.

9. Save your changes.

10. Choose *Simulate Underwriting* from the footer toolbar.

- If it passes the simulation, a success message appears.
- If it triggers referral rules or doesn't pass the simulation, the *Simulation Result* dialog box appears, showing the violations and expected underwriting decision.

11. **Optional:** In the footer toolbar, choose *Manage Evidence*. Choose *Browse* to choose the evidence, choose an evidence type and the permission level, and then choose *Upload*.

The evidence will be attached to the policy, coverage or contract component that was selected.

- To cancel the operation, choose *Cancel*.

The added evidence appears in the evidence list with the following information displayed:

- Uploaded by

- Date of uploading
- Evidence type
- Permission level
- Business object level the evidence is on

## 2.4 Reviewing Individual Quotes

On the quote review screen, you can review quote details, and perform further tasks, such as submitting the quote for underwriting, generating a quote letter, and displaying contract illustrations.

### Prerequisites

- You are on the [New Quick Quote](#) or [Producer Application](#) screen with all mandatory information entered.

### Context

The quote letter generation step can be configured to be before or after submitting for underwriting for a specific product. For more information about the configuration, see [Configuring Quote Letter Generation](#).

### Procedure

1. Choose [Review](#).

The [Create Insurance Quote](#) screen appears.

2. Review the quote details, such as the policyholder name, policy term, and premium breakdown such as quote pricing details, and premium amounts.
3. Choose [Generate Quote Letter](#).

A quote letter is produced in PDF format and displayed in a new window. You can download and/or print the quote letter.

#### Note

When the quote letter is generated, it will be valid for 30 days. The expiration period of the quote letter is configurable at the product level. After the quote letter is generated, choosing the [Generate Quote Letter](#) button again doesn't generate a new one but opens the generated one.

4. (For quick quotes only) Choose [Convert to Full Quote](#), and then confirm in the [Convert to Full Quote](#) dialog box.

If you haven't provided the policyholder information previously, the [Create Insurance Quote](#) screen appears, where you need to enter the policyholder information. On the [Product Application](#) screen, you also need to enter required data for the converted full quote. For detailed instructions, see [Entering Full Quote Data \[page 9\]](#).

- (For full quotes only) Choose [Submit for Underwriting](#) to underwrite the risk.

One of the following actions occur:

<b>The quote option is accepted by underwriting.</b>	The submission status remains <code>Working</code> , the derived submission status changes to <code>Approved</code> , and the quote option status changes to <code>Approved</code> .
<b>The quote is declined by underwriting.</b>	The submission status remains <code>Working</code> , the derived submission status changes to <code>Unapproved</code> , and the quote option status changes to <code>Disapproved</code> .
<b>The quote is referred by underwriting.</b>	The submission status remains <code>Working</code> , the derived submission status changes to <code>Underwriting</code> , and the quote option status changes to <code>Referred</code> .

- Optional:** Choose [Create Task](#).

The [Create New Task](#) dialog box appears. For detailed instructions, see [Creating Tasks \[page 82\]](#).

- Optional:** Choose [Notes](#).

The [Notes](#) dialog box appears. You can send notes to other users. For detailed instructions, see [Using Notes \[page 79\]](#).

- Optional:** Choose [Manage Submission](#). On the [Manage Quote Submission](#) screen, perform the following tasks as needed:

- To convert a quick quote to a full quote, choose an option, and then choose [Convert to Full Quote](#).

**Note**

Once converted to a full quote, the policyholder is defaulted as the premium payer.

- To copy a quote option, choose an option, and then choose [Copy](#).

**Note**

You can copy only one option at a time.

- To compare multiple quote options, choose the options to compare, and then choose [Compare](#).

**Note**

You can compare up to five quote options at a time.

- To delete a quote option, choose an option in `Working` status, and then choose [Delete](#).
- To return to the worklist, choose [Return to Worklist](#).
- To reassign the submission to another user, choose [Reassign](#), and then choose a user.

**Note**

The [Reassign](#) button is available if the user has `SAMPLE_DATA_ENTRY_AGENT` role.

- To set the submission as 'Not Taken', choose [Set Not Taken](#).

- To reactivate the submission set as 'Not Taken', choose [Reactivate](#).
- To create a task, choose [Create Task](#).

## Next Steps

- To review the underwriting decisions, choose the status in the screen header, and review the reason and comments in the [Underwriter Decision](#) popover.
- For non CBC-relevant products:
  - When the quote letter generation step is configured to be before the submitting for underwriting step, if a quote option is approved by the underwriter, the [Issue](#) button will appear. You can then choose an approved option and choose [Issue](#) to issue a policy.
  - When the quote letter generation step is configured to be after the submitting for underwriting step, if a quote letter is generated, the [Issue](#) button will appear. You can then choose a quoted option and choose [Issue](#) to issue a policy.
- For CBC-relevant products:
  - When the quote letter generation step is configured to be before the submitting for underwriting step, if a quote option is approved by the underwriter and the Cash Before Cover payment is made in full in FS-CD, the [Issue](#) button will appear. You can then choose an approved option and choose [Issue](#) to issue a policy.
  - When the quote letter generation step is configured to be after the submitting for underwriting step, if a quote letter is generated and the Cash Before Cover payment is made in full, the [Issue](#) button will appear. You can then choose a quoted option and choose [Issue](#) to issue a policy.

## Related Information

[Using My Insurance Worklist \[page 49\]](#)

[Using Notes \[page 79\]](#)

[Creating Tasks \[page 82\]](#)

[Entering Full Quote Data \[page 9\]](#)

## 2.5 Issuing an Individual Policy

For non CBC-relevant products, you can issue an individual policy after an option passes underwriting. For CBC-relevant products, you can issue an individual policy after an option passes underwriting and the cash before cover payment is settled in FS-CD.

### Prerequisites

- The underwriter has approved the individual insurance quote option.
- (For CBC-relevant products) The Cash Before Cover payment is made in full in FS-CD.

### Procedure

1. In the Fiori Launch Pad, choose *My Insurance Worklist*.  
The *My Insurance Worklist* screen appears.
2. Find your individual insurance quote by searching or filtering, and then choose the quote in the search results.  
The *Manage Quote Submission* screen appears.
3. Choose an approved quote option or a quoted quote option by choosing its row or the > symbol at the end of its row.  
The *Create Insurance Quote (Review Quote)* screen appears.
4. Choose *Issue*.  
The quote option status changes to **Issued**. A policy ID is generated.

## 3 Using Create Group Insurance Quote

With the *Create Group Insurance Quote* transactional App, you can create a group insurance quote for a group of members, creating different plans for different groups of members, and review and issue the group quote.

After entering the general information for the group quote, you must enter the group defaults, which will be used as the template for the plans you create later, and the plan defaults will then be used as the template for the plan members you add to the plans.

After reviewing all entered information, you can generate the quote letter and submit the group insurance quote for underwriting. Once the group insurance quote is approved by the underwriter, you can issue it.

### 3.1 Entering and Reviewing General Information

You must enter the general information for the master policy of the group quote. Then you can review the information you entered.

#### Procedure

1. In the Fiori Launchpad, choose *Create Group Insurance Quote*.

The *Create Group Insurance Quote* screen appears.

2. Enter the information of the commission participant.

#### → Tip

You can use the ID, name or commission contract number to search for a commission participant.

- To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
- To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
- To refresh the information of the business partner after you update it, choose *Refresh*.

#### ⓘ Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

#### ⓘ Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing *Refresh* in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

3. Enter the information of the sales product.
4. Enter the information of the policyholder.
  - To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
  - To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
  - To refresh the information of the business partner after you update it, choose *Refresh*.

#### 📌 Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

#### 📌 Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing *Refresh* in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

5. Choose *Save*.
  - To cancel the operation, choose *Cancel*.

The *Create Group Insurance Quote* screen appears in read-only mode.
6. Review the general information and make sure all information is correct, and then choose *Enter Group Defaults*.
  - To edit the general information again, choose *Edit*.

The *Continue* dialog box appears.
7. Choose *Continue*.
  - To cancel the operation, choose *Cancel*.

The *Producer Application* screen appears.

## 3.2 Entering Group Defaults

Under the policy, you can add contracts and coverages, and maintain their default information. The group defaults will be used for the plans you create later, and the plan defaults will be used for the members you add to the plans.

### Prerequisites

- You have entered the general information.
- You are on the *Producer Application* screen.

## Procedure

1. On the left panel, choose the policy item.  
The policy details appear on the right panel.
2. Enter all mandatory information, and then choose [Save](#).
3. On the left panel, add a contract by choosing **+**, and then choosing a contract in the [Add](#) dialog box.

The contract item appears on the left panel.

4. Choose the contract item you just added from the left panel.

The contract details appear on the right panel.

5. Enter all mandatory information, and then choose [Save](#).
  - a. In the [Calculation Rule Type](#) list, choose a calculation rule type.
  - b. In the [Tax Characteristics](#) section, choose a tax payer information and premium tax scope.
  - c. In the [Premium Payer](#) section, add a premium payer.
  - d. **Optional:** In the [Beneficiary](#) section, add a beneficiary.

When adding the premium payer or beneficiary, you can update the business partner or refresh the business partner information after updating it.

The contract information is saved.

6. On the left panel, add a coverage by choosing the contract item, choosing **+**, and then choosing a coverage in the [Add](#) dialog box.

The coverage item appears on the left panel.

7. Choose the coverage item you just added from the left panel.

The coverage details appear on the right panel.

8. Enter all mandatory information, and then choose [Save](#).
  - a. In the [Endowment Benefit](#) field, enter a number.
  - b. In the [Death Benefit](#) field, enter a number.

The coverage information is saved.

9. Choose [Manage Plans](#) from the footer toolbar.

The [Create Group Insurance Quote](#) screen appears with the [Plan](#) tab displayed by default. The group quote status changes to `working`.

## 3.3 Creating and Managing Plans

You can create a plan from scratch, or create one by copying an existing plan later. The group defaults entered previously will be used for the plans you create here, but you can change it as needed.

### Prerequisites

- You have entered the general information and group defaults.

### Procedure

1. On the *Plan* tab page, choose **+** in the toolbar.  
The *Create Plan* dialog box appears.
2. Enter the plan name and description, and then choose *OK*.
  - To cancel the operation, choose *Cancel*.The created plan appears in the plan list.
3. Choose the row of the plan.  
The *Producer Application* screen for the plan appears.
4. Edit the policy, contract, and/or coverage information as needed, and then choose *Save* and *Manage Plans*.  
The *Plan* tab page appears.

### Next Steps

- To edit a plan, select the radio button of that plan, and then choose *Edit*. You can edit the name and description of the plan in the *Edit Plan* dialog box.
- To copy a plan, select the radio button of that plan, and then choose *Copy*. You can give the copied plan a new name and description in the *Copy Plan* dialog box.
- To delete a plan, select the radio button of that plan, and then choose *Delete*. You can delete it by choosing *Delete* in the *Warning* dialog box or cancel the operation by choosing *Cancel*.
- To manage members of a plan, choose *Manage Members* on the row of that plan, and follow the instructions of "Creating and Managing Plan Members for One Plan".

## 3.4 Creating and Managing Plan Members

You can add members to the plan or plans you created and manage those plan members.

You can create plan members in one of the following ways:

- Searching for existing business partners
- Creating from scratch
- Uploading plan members

You can manage plan members for just one plan or for all plans.

### 3.4.1 Creating and Managing Plan Members for One Plan

You can create and manage plan members for each plan separately.

#### Prerequisites

- You have created at least one plan.


#### Procedure

1. On the *Plan* tab page, choose *Manage Members* for the target plan.

The member management screen appears.

2. Take action according to your purpose.

To	Do This
Add members individually	<ol style="list-style-type: none"><li>1. Choose <b>+</b> in the toolbar.</li><li>2. In the <i>Add Members to Plan</i> dialog box, search for business partners or create members from scratch, add one or more of them to the plan, and then choose <i>OK</i>.<ul style="list-style-type: none"><li>• To create a new business partner, choose <i>New</i> in the <i>Add Members to Plan</i> dialog box. Then you can create a new business partner in SAP GP-FS on a new tab or page.</li></ul></li></ol>

To	Do This
	<p><b>Note</b></p> <p>When creating a plan member from scratch, the format of member attributes must follow the rules configured in the SAP GP-FS system.</p>
<p><b>Add members by uploading</b></p>	<ol style="list-style-type: none"> <li>1. Choose  in the toolbar.</li> <li>2. In the <i>Upload Plan Members</i> dialog box, browse for the plan member list (a CSV file), and then choose <i>OK</i>.</li> </ol> <p><b>Note</b></p> <p>The CSV file must be encoded in UTF-8 to support Traditional Chinese and Korean. The file name can't be in Traditional Chinese or Korean.</p> <p><b>Note</b></p> <p>A business partner is immediately created for each member in the list. For more information, see <a href="#">About Uploading Plan Members [page 25]</a>.</p>

The added members appear in the member list.

3. Choose  on the row of each member.

**Note**

If the validation status of the added member is `Invalid`, make sure you fix it by completing mandatory information in the next step, otherwise you can't review the group quote later.

The *Producer Application* screen for this member appears.

4. Edit the policy, contract, and/or coverage information as needed, and then choose *Manage Members*.

The member management screen appears.

## Next Steps

- To search for members, enter the first name or last name in the search box in the toolbar and then choose *Q*.



**Tip**

The keyword can be a part of or the whole of the first name or last name.

- To delete members, choose the member or members you want to delete, and then choose *Delete* in the toolbar. You can confirm the operation by choosing *Delete* in the *Warning* dialog box or cancel the operation by choosing *Cancel*.

### Note

A deleted member is only removed from the plan, but won't be deleted from the local database and SAP GP-FS system.

- To switch between plans (if there are more than one), choose the upward or downward triangle.
- To sort or group the members, choose  to view the *Filter* dialog box. And then choose the criteria to sort or group by.
- To show or hide columns in the table, choose  in the toolbar, and then choose which columns to show or hide in the *Columns* dialog box.
- To go back to the *Plan* tab page, choose *Manage Plans*.

## Related Information

[About Uploading Plan Members \[page 25\]](#)

## 3.4.2 Creating and Managing Plan Members for All Plans


You can create and manage plan members for all plans centrally.

### Prerequisites


- You have created at least one plan.

### Procedure

1. Choose the *Member* tab from the *Create Group Insurance Quote* screen.  
The *Member* tab page appears.
2. Take action according to your purpose.

To	Do This
Add members individually	<ol style="list-style-type: none"><li>1. Choose  in the toolbar.</li><li>2. In the <i>Add Members to Plan</i> dialog box, search for business partners or create members from scratch, add one or more of them to the plan, and then choose <i>OK</i>.</li></ol>

To	Do This
	<ul style="list-style-type: none"> <li>To create a new business partner, choose <a href="#">New</a> in the <a href="#">Add Members to Plan</a> dialog box. Then you can create a new business partner in SAP GP-FS on a new tab or page.</li> </ul> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Note</b></p> <p>When creating a plan member from scratch, the format of member attributes must follow the rules configured in the SAP GP-FS system.</p> </div>

<b>Add members by uploading</b>	<ol style="list-style-type: none"> <li>Choose  in the toolbar.</li> <li>In the <a href="#">Upload Plan Members</a> dialog box, browse for the plan member list (a CSV file), and then choose <i>OK</i>.</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Note</b></p> <p>The CSV file must be encoded in UTF-8 to support Traditional Chinese and Korean. The file name can't be in Traditional Chinese or Korean.</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Note</b></p> <p>A business partner is immediately created for each member in the list. For more information, see <a href="#">About Uploading Plan Members [page 25]</a>.</p> </div>
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The added members appear in the member list.

- Choose  on the row of each member.

**Note**


If the validation status of the added member is `Invalid`, make sure you fix it by completing mandatory information in the next step, otherwise you can't review the group quote later.

The [Producer Application](#) screen for this member appears.

- Edit the policy, contract, and/or coverage information as needed, and then choose [Manage Members](#).

The [Member](#) tab page appears.

## Next Steps

- To search for members, enter the first name or last name in the search box in the toolbar and then choose .

**Tip**

The keyword can be a part of or the whole of the first name or last name.

- To delete members, choose the member or members you want to delete, and then choose *Delete* in the toolbar. You can confirm the operation by choosing *Delete* in the *Warning* dialog box or cancel the operation by choosing *Cancel*.

#### Note

A deleted member is only removed from the plan, but won't be deleted from the local database and SAP GP-FS system.

- To change the plan for a member, choose a different plan in the *Plan* list of that member, and then choose *OK* in the *Confirm* dialog box.

#### Note

When you change the plan for a member, the policy, contract, and coverage data of that member will be replaced with that of the new plan.

## Related Information

[About Uploading Plan Members \[page 25\]](#)

## 3.5 Reviewing a Group Quote

You can review the group quote after you have created plans and added members to the plans.

### Prerequisites

- All plan members are valid.

### Context

The quote letter generation step can be configured to be before or after submitting for underwriting for a specific product. For more information about the configuration, see [Configuring Quote Letter Generation](#).

### Procedure

1. Choose the *Review* tab from the *Create Group Insurance Quote* screen.

The *Review Group Insurance Quote* screen appears.

2. Review the information about the quote, plans, and members, make sure all information is correct, and then choose *Generate Quote Letter*.

- To quit the operation, choose *Return to Worklist*.

The *Warning* dialog box appears.

3. Choose *OK*.

- To cancel the operation, choose *Cancel*.

The quote status changes to *Quoted*.

4. On the *Review Group Insurance Quote* screen, choose *Submit for Underwriting*.

- To quit the operation, choose *Return to Worklist*.

The *Warning* dialog box appears.

5. Choose *OK*.

- To cancel the operation, choose *Cancel*.

The quote status changes to *Referred*.

6. On the *Review Group Insurance Quote* screen, choose *Return to Worklist*.

## 3.6 Issuing a Group Policy

After the underwriter approves a group insurance quote, you can issue a group policy.

### Prerequisites

- The underwriter has approved the group insurance quote.

### Procedure

1. In the Fiori Launch Pad, choose *My Insurance Worklist*.

The *My Insurance Worklist* screen appears.

2. Find your group insurance quote by searching or filtering, and then choose the quote in the search results.

The *Review Group Insurance Quote* screen appears.

3. Choose *Issue Policy*.

The *Warning* dialog box appears.

4. Choose *OK*.

- To cancel the operation, choose *Cancel*.

The quote status changes to `Issued`.

## 3.7 About Uploading Plan Members

You can add one or more plan members by uploading them with a standard data sheet template (CSV file).

### Columns of the Standard Data Sheet Template

The standard data sheet template contains 44 columns, of which the first 22 columns are mandatory, and the rest of them are dynamic.

The column headers of the mandatory columns are:

- PlanName
- IDType
- IDTypeDescription
- IDNumber
- Title
- FirstName
- LastName
- Gender
- BirthDate
- Country
- State
- City
- Zip
- Street
- HouseNumber
- PhoneNumber
- PhoneExtension
- Mobile
- Fax
- FaxExtension
- Email
- Website

The column headers of the dynamic columns are:

- BeneSharePercentage
- BeneIDchooseDescription

- BeneIDNumber
- BeneTitle
- BeneFirstName
- BeneLastName
- BeneGender
- BeneBirthDate
- BeneCountry
- BeneState
- BeneCity
- BeneZip
- BeneStreet
- BeneHouseNumber
- BenePhoneNumber
- BenePhoneExtension
- BeneMobile
- BeneFax
- BeneFaxExtension
- BeneEmail
- BeneWebsite
- F120FundRange

## Validation Rules of the Data Sheet

Once you submit the data sheet, the system validates it before uploading. If errors are found, then based on the severity of the errors, the system either ends the uploading process without uploading any data, or uploads only the standard-compliant data; either way, the error message shows you what's wrong so you can fix the problems and upload the data again.

### Validation Rules for Fatal Errors

Fatal errors prevent the data from being uploaded. A fatal error occurs when any violation of the following validation rules happens.

#### File

- The file format must be CSV.
- The file doesn't contain virus.

#### Content

- The column headers are identical to the ones in the template.

#### Note

The column headers are unique, case-sensitive, and contain no space.

- The headers of all mandatory columns are included.

- The values of the following columns are not empty:
  - PlanName
  - IDType
  - IDTypeDescription
  - IDNumber
  - FirstName
  - LastName
  - Gender
  - BirthDate
  - Country
  - State
  - City
  - Zip
  - Street
  - HouseNumber
  - Email
- Each row is unique.
- Each member is unique.

#### Note

A member is identified with IDType + IDNumber.

### Validation Rules for Non-fatal Errors

Non-fatal errors don't prevent the correct data from being uploaded. The error message shows which line items are problematic. After you fix the problems, you can upload the data again.

A non-fatal error occurs when any violation of the following validation rules happens.

#### Note

When you upload the data again, the correct data won't be uploaded again.

A non-fatal error occurs when any violation of the following validation rules happens.

- The plan name must exist. (You have created the plans with the specified names.)
- Each member is added to one plan only.

### Extensibility of the Standard Data Sheet Template

You can add your own dynamic columns to meet additional business requirements.

#### Note

For instructions on how to add your own dynamic columns, see [Extending Dynamic Columns](#).

## 4 Using Create Master Insurance Quote

With the [Create Master Insurance Quote](#) transactional App, you can create a master insurance quote.

After creating a master insurance quote, you can issue it as a master policy. Later you can create a multi-individual quote with this master policy.

### 4.1 Entering General Information

You must enter a name and choose a template for the master insurance quote you are creating.

#### Procedure

1. In the Fiori Launchpad, choose [Create Master Insurance Quote](#).

The [Create Master Insurance Quote](#) screen appears.

2. Enter a master policy name and choose a master policy template, and then choose [Next](#).

- To cancel the operation, choose [Cancel](#).

The [Continue](#) dialog box appears.

3. Choose [Continue](#).

- To cancel the operation, choose [Cancel](#).

The [Create Master Insurance Quote](#) refreshes with the [Master Policy Data](#) tab page displayed by default.

### 4.2 Entering Master Policy Data, Product, and Partners

In the master insurance quote, you must add a product, and add at least one partner. You must choose one and only one of the added partners as the main policyholder, which will be used for the multi-individual quote you create later.

#### Prerequisites

- You have entered the general information for a master policy.

## Procedure

1. On the *Master Policy Data* tab page, enter the start date and end date of the master policy.

### Note

At this step, you can change the master policy name, but you can't change the master policy template.

- To make all partners the default policyholder of the individual policies created from this master policy, choose *Set as Default Policyholder*.
2. In the *Product* section, choose **+**.

The *Master Policy Sales Product Details* screen appears.

3. In the *Sales Product Name* field, search for and choose a product.

- To prevent users from creating multi-individual quotes with this master policy, choose *Lock for New Business*.

The chosen product appears in the *Sales Product Name* field.

4. Choose *Save*, and then choose the left arrow to go back.

The *Master Policy Data* tab page appears.

5. In the *Partners* section, choose **+**.

The *Master Policy Partner Details* screen appears.

6. In the *Business Partner ID* field, search for and choose a partner.

- To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
- To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
- To refresh the information of the business partner after you update it, choose *Refresh*.

### Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

### Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing *Refresh* in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

- To set this partner as the main policyholder, choose *Main Policyholder*.

The ID of the chosen partner appears in the *Business Partner ID* field, and the address appears in the *Account Address* field.





7. Choose *Save*, and then choose the left arrow to go back.

### Note

You can add one or more partners, and you must set one of them as the main policyholder.

The *Master Policy Data* tab page appears.

## Next Steps

- To edit the product, in the *Product* section, choose .
- To add a partner, in the *Partners* section, choose .
- To edit a partner, in the *Partners* section, choose  on the row of the partner.
- To delete a partner, in the *Partners* section, choose  on the row of the partner.

## 4.3 Entering Commission Participant Information

You must add at least one commission participant.

### Prerequisites

- You have entered master policy data, product, and partners.

### Procedure

1. Choose the *Commission* tab.

The *Commission* tab page appears.

2. In the *Commission Participants* section, choose .

The *Commission Participant Details* screen appears.

3. In the *Commission Partner ID* field, search for and choose a commission partner.

- To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
- To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
- To refresh the information of the business partner after you update it, choose *Refresh*.

#### Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

### Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing [Refresh](#) in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

The ID of the chosen commission partner appears in the [Commission Partner ID](#) field.

4. Choose [Save](#), and then choose the left arrow to go back.

The [Commission](#) tab page appears.

5. Choose [Save](#).

The [Issue Policy](#) button appears if there's no error.

## Next Steps

- To add a commission participant, in the [Commission Participant](#) section, choose [+](#).
- To edit a commission participant, in the [Commission Participant](#) section, choose [✎](#) on the row of the commission participant.
- To delete a commission participant, in the [Commission Participant](#) section, choose [⊗](#) on the row of the commission participant.

## 4.4 Issuing a Master Policy

After you have entered all required information, you can issue the master policy, with which you can create multi-individual quotes later.

### Prerequisites

- You have entered the commission participants information.
- You saved the information and the [Issue Policy](#) button appeared.

### Procedure

1. Choose [Issue Policy](#).

The [Issue Policy](#) dialog box appears.

2. Choose [Issue](#).

- To cancel the operation, choose *Cancel*.

The master insurance quote status changes from *working* to *Issued*. The *Create Quote* button appears on the master policy details screen if *Lock for New Business* isn't chosen.

## Next Steps

- If the *Create Quote* button appears on the master policy details screen, you can choose it to navigate to the *Create Insurance Quote from Master* transactional App, and create an individual quote with the master policy you just created.

# 5 Using Create Insurance Quote from Master

With the *Create Insurance Quote from Master* transactional App, you can create a multi-individual quote with a master policy.

The master policy you select will be used as the template of the multi-individual quote.

## 5.1 Choosing a Master Policy

You must choose a master policy as the template of the multi-individual quote you are creating.

### Context

#### → Tip

If you navigate to the *Create Insurance Quote from Master* transactional App directly from the *Create Master Insurance Quote* transactional App, go to Step 3.

### Procedure

1. In the Fiori Launchpad, choose *Create Insurance Quote from Master*.

The *Create Insurance Quote from Master* screen appears.

2. Search for and choose a master policy.

#### ⓘ Note

If *Lock for New Business* is chosen for the master policy when created, then an error message appears, telling you that it's not allowed to create individual quotes with this master policy, unless you or other authorized user changes the setting in FS-PM.

The type, term, sales product, and template of the master policy appear. The effective date and expiration date of the multi-individual quote are automatically copied from the chosen master policy.

3. **Optional:** Edit the effective date and expiration date of the multi-individual quote as needed.

#### ⓘ Note

The multi-individual quote term must fall in the range of the master policy term.

The term length is calculated based on the effective date and expiration date. The effective date and expiration date will be copied to each individual quote later created.

4. Choose *Save*.

A *Continue* dialog box appears.

5. Choose *Continue*.

- To cancel the operation, choose *Cancel*.

The changes are saved. In the *Quote List* sub-section under the *Individual Quotes* section, the *Create*, *Upload*, *Edit*, and *Delete* button appear. The *Upload* button is disabled first because you must create at least one valid individual quote as the template before uploading. The *Edit* and *Delete* button are also disabled at this stage.

## 5.2 Creating Individual Quotes

After you have chosen a master policy and saved related information, you can create individual quotes.

You can create individual quotes in one of the following ways:

- Creating individual quotes individually
- Creating individual quotes by uploading

### 5.2.1 Creating an Individual Quote

You can create individual quotes manually, one by one.

#### Procedure

1. On the *Create Insurance Quote from Master* screen, choose ► *Individual Quotes* > *Quote List* ▾.

The screen scrolls down to the *Quote List* sub-section.

2. In the *Quote List* sub-section, choose *Create*.

#### → Tip

The *Create* button only appears after you have chosen *Save* on the *Create Insurance Quote from Master* screen.

The *Create an Individual Quote* dialog box appears.

3. Enter a description of this quote, and then choose *OK*.

- To cancel the operation, choose *Cancel*.

The *Producer Application* screen appears.

4. Enter all mandatory information in the right panel, and then choose [Save](#).
  - a. In the [Policyholder Information](#) section, add a policyholder.
  - b. **Optional:** In the [Representative](#) section, add a representative.
  - c. **Optional:** In the [External Reference](#) section, add an external reference.
  - To create a new business partner, choose [New](#) in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
  - To update the information of the business partner, choose [Update](#). Then you can update the information in the SAP GP-FS system on a new tab or page.
  - To refresh the information of the business partner after you update it, choose [Refresh](#).

#### Note

The [Update](#) button and [Refresh](#) button will be available after a commission participant is chosen.

#### Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing [Refresh](#) in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

The policy information is saved.

5. Choose the policy item in the left panel, then choose **+**, and choose a contract in the [Add](#) dialog box.

The contract item appears on the left panel.

6. Choose the contract item you just added from the left panel.

The contract details appear on the right panel.

7. Enter all mandatory information, and then choose [Save](#).
  - a. **Optional:** In the [Payment Frequency](#) section, choose a payment frequency.
  - b. In the [Premium Payer Information](#) section, add a premium payer.
  - c. **Optional:** In the [Related Contract](#) section, add a related contract.
  - d. **Optional:** In the [Surcharge and Discount](#) section, add a surcharge or discount.
  - To create a new business partner, choose [New](#) in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
  - To update the information of the business partner, choose [Update](#). Then you can update the information in the SAP GP-FS system on a new tab or page.
  - To refresh the information of the business partner after you update it, choose [Refresh](#).

#### Note

The [Update](#) button and [Refresh](#) button will be available after a commission participant is chosen.

#### Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing [Refresh](#) in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

The contract information is saved.

8. Choose the contract item in the left panel, then choose **+**, and choose a coverage in the *Add* dialog box .

The coverage item appears on the left panel.

9. Choose the coverage item you just added from the left panel.

The coverage details appear on the right panel.

10. Enter all mandatory information, choose *Save*, and then choose *Back to Quote*.

- a. In the *Insured Amount* field, enter an insured amount.
- b. In the *Insured Object* section, add an insured object.
  - To create a new business partner, choose *New* in the selection dialog box. Then you can create a new business partner in the SAP GP-FS system on a new tab or page.
  - To update the information of the business partner, choose *Update*. Then you can update the information in the SAP GP-FS system on a new tab or page.
  - To refresh the information of the business partner after you update it, choose *Refresh*.

#### ⓘ Note

The *Update* button and *Refresh* button will be available after a commission participant is chosen.

#### ⓘ Note

Updates to the `Partner ID` and `Role` of a business partner aren't immediate. Choosing *Refresh* in the first minute after the update will retrieve information from the cache, which may differ from the information in SAP GP-FS.

The *Create Insurance Quote from Master* screen appears. The created individual quote appears in the table in the *Quote List* sub-section. The *Upload* button and *Edit* button are enabled. The *Calculate Premium* button appears if the validation status of all individual quotes are `valid`.

11. Repeat this procedure to manually create as many individual quotes as needed.

## Next Steps

- To edit the individual quotes, choose *Edit*, and then you can edit the description of any individual quote.
- To delete one or more individual quotes, choose the quote or quotes and choose *Delete*. You can delete the quote or quotes by choosing *OK* in the *Confirm* dialog box or cancel the operation by choosing *Cancel*.

## 5.2.2 Creating Individual Quotes by Uploading a List

You can create individual quotes by uploading a list based on the standard data sheet template.

### Prerequisites

- You have created at least one valid individual quote.

### Procedure

- In the *Quote List* sub-section, choose *Upload*.  
The *Upload Individual Quotes* dialog box appears.
- Choose a previously created individual quote in the *Select an Individual Quote as the Template* list.  
The chosen individual quote appears in the *Select an Individual Quote as the Template* field.
- Choose *Browse*.  
The *Open* dialog box appears.
- Navigate to and choose your CSV file, and then choose *Open*.

#### Note

The CSV file must be encoded in UTF-8 to support Traditional Chinese and Korean. However, the file name cannot be in Traditional Chinese or Korean. For more information about uploading individual quotes, see [About Uploading Multiple Individual Quotes \[page 40\]](#).

The chosen CSV file appears in the *Select a File* field.

- Choose *Upload*.

#### Note

If the *Error* dialog box appears, you can read the message to understand the problem and choose *Show Details* to learn the details.

The uploaded individual quotes appear in the table in the *Quote List* sub-section. The *Calculate Premium* button is enabled if the validation statuses of all individual quotes are `valid`.

### Next Steps

- To edit the individual quotes, choose *Edit*, and then you can edit the description of any individual quote.
- To delete one or more individual quotes, choose the quote or quotes and choose *Delete*. You can delete the quote or quotes by choosing *OK* in the *Confirm* dialog box or cancel the operation by choosing *Cancel*.

## Related Information

[About Uploading Multiple Individual Quotes \[page 40\]](#)

## 5.3 Calculating a Premium and Submitting for Underwriting

After you have created individual quotes for the multi-individual quote, you can calculate the premium and then submit the quote for underwriting.

### Prerequisites

- The validation statuses of all individual quotes are valid.

### Context

#### Note

Due to a functional limitation on exchange rate conversions and multi-currency aggregations, local currency will be used for premium calculation and aggregation.

### Procedure

1. Choose *Calculate Premium* from the *Create Insurance Quote from Master* screen.  
The calculation results appear in the *Premium* column of the table. The *Calculate Premium* button changes to the *Submit for Underwriting* button.
2. Scroll down to the *Quote Summary* section to review the quote information and quote premium, and then choose *Submit for Underwriting*.  
The *Submit for Underwriting* dialog box appears.
3. Choose *Submit*.
  - To cancel the operation, choose *Cancel*.The multi-individual quote status changes to *Referred*. Once approved by the underwriter, the status changes to *Approved*.

## Next Steps

- To view the premium breakdown of each individual quote, choose its premium link.

## 5.4 Generating a Quote Letter and Issuing a Multi-individual Quote

After the multi-individual quote is approved by the underwriter, you can generate the quote letter and issue it.

### Prerequisites

- The multi-individual quote has been approved by the underwriter.

### Context

The quote letter generation step can be configured to be before or after submitting for underwriting for a specific product. For more information about the configuration, see [Configuring Quote Letter Generation](#).

### Procedure

1. In the Fiori Launchpad, choose *My Insurance Worklist*.  
The *My Insurance Worklist* screen appears.
2. Find your multi-individual quote by searching or filtering, and then choose the quote in the search results.  
The *Create Insurance Quote from Master* screen appears.
3. Choose *Generate Quote Letter*.  
The status of the multi-individual quote and all individual quotes under it changes to `Quoted`. The *Submit for Underwriting* button changes to *Issue Policies* button.
4. Choose *Issue Policies*.  
The *Issue Policies* dialog box appears.
5. Choose *Issue Policies*.  
The status of the multi-individual policy and all individual policies under it changes to `Issued`. A policy ID is generated for each individual quote in the *Quote List* section.

## 5.5 About Uploading Multiple Individual Quotes

You can add multiple individual quotes by uploading them with a standard data sheet template (CSV file) and a previously created valid individual quote under this multi-individual quote.

### Columns of the Standard Data Sheet Template

The standard data sheet template contains 22 columns. The first six columns are static columns which are independent from specific business (for example, household, auto), and the rest are dynamic columns which are dependent on specific business. The dynamic columns are configured in FS-PRO.

The column headers of the static columns are:

- INSOBJNR\_TT (insured object number)
- OBJCAT\_CD (insured object category)
- OBJTYP\_CD (insured object type)
- INSOBJ\_TT (insured object name)
- PARTN\_ID (partner ID)
- DESCRIPTION (policy description)

The standard data sheet template contains multiple insured objects. Each insured object will be generated into an individual quote.

Each line in the standard data sheet template represents an insured object. Each insured object can be an existing one or a new one.

- If the INSOBJNR\_TT (insured object number) is blank, then it's considered a new insured object, where all the other columns must not be blank, and the information in these columns will be used for creating a new insured object in FS-PM.
- If the INSOBJNR\_TT (insured object number) is not blank, then it's considered an existing insured object, and all other attributes will be skipped when uploading.

For existing insured objects, the insured object number is the only identifier. For new insured objects, all other attributes of any two such insured objects must not be identical at the same time.

For each created individual quote, the policy data such as contract, coverage, policyholder, premium payer, commission, and insured amount will be copied from the referenced quote.

The insured object data from the standard data sheet template will be copied to the coverage level. If there are multiple coverages, the data will be copied to each coverage.

### Validation Rules of the Data Sheet

Once you submit the data sheet, the system validates it before uploading. If errors are found, then based on the severity of the errors, the system either ends the uploading process without uploading any data, or uploads only the standard-compliant data; either way, the error message shows you what's wrong so you can fix the problems and upload the data again.

## Validation Rules for Fatal Errors

Fatal errors prevent the data from being uploaded. A fatal error occurs when any violation of the following validation rules happens.

### File

- The file format must be CSV.
- The file doesn't contain virus.

### Content

- The column headers are identical to the ones in the template.

#### Note

The column headers are unique, case-sensitive, and contain no space.

- The headers of all static columns are included.
- Each insured object is unique.

## Validation Rules for Non-fatal Errors

Non-fatal errors don't prevent the correct data from being uploaded. The error message shows which line items are problematic. After you fix the problems, you can upload the data again.

A non-fatal error occurs when any violation of the following validation rules happens.

- The INSOBJNR\_TT (insured object number) is not blank

## Extensibility of the Standard Data Sheet Template

To meet your additional requirements, you can extend the standard data sheet. The following extensions are possible:

- Dynamic columns extension
- File parser extension

For instructions on the extension, see [Extending Fiori Apps UI](#).

# 6 Using Manage Issued Policies

With the *Manage Issued Policies* transactional App, you can search for a specific policy to view policy details or to process a change business transaction.

You can search for an in-force policy (in the FS-PM system) using either the policy number or account information.

<b>Search based on the policy number</b>	If the policy is found in the FS-PM system, then the result will be displayed in the your worklist
<b>Search based on account information (either the policy holder or a representative)</b>	If you search for policies based on account information, the policies belonging to the account will be retrieved and displayed in the worklist.

## → Tip

If you are having difficulty viewing the app content in a supported translated language, check your browser's language settings. If this doesn't resolve the issue, contact your system administrator.

## 6.1 Searching for an Issued Policy

You can search for policies that have already been issued, either by entering the policy number or by searching account details.

### Context

- Search fields are not case-sensitive.
- You can search by a single criteria or multiple criteria
- For search fields that support partial values, you can use wildcard characters at the beginning and/or end of the search string.
- The maximum number of policies that can be listed is 100, even if your search returns a higher number of results. If your search results exceeds the 100 item limit, apply additional filters to narrow your search.

### Procedure

1. In the Fiori Launchpad, choose **Manage Issued Policies**.

The *Manage Issued Policies* screen appears.

2. If you know the policy number, enter it in the [Policy Number](#) field and choose [Go](#).

Either a full or partial policy number may be entered.

3. If you don't have a policy number to search for, select the [Account](#) field to search accounts.

The [Select: Account](#) screen opens.

4. Enter your filter criteria in the [Select: Account](#) screen and choose [Go](#).

You can enter one or multiple filter criteria to search for an issued policy:

<b>First Name</b>	Will return a list of all accounts that have specified text in their Account First Name. This field accepts either full or partial values.
<b>Last Name</b>	Will return a list of all accounts that have specified text in their Account Last Name. This field accepts either full or partial values.
<b>Date of Birth</b>	Will return a list of all accounts with this Date of Birth. This field will accept the complete date only, selected using a Date Picker.
<b>ID Number</b>	Will return the account holder for the specified ID number. This field will accept the complete ID Number only.
<b>House Number</b>	a list of all accounts that have specified text in their House Number This field accepts either full or partial values.
<b>Street</b>	Will return a list of all accounts that have specified text in their Street name This field accepts either full or partial values.
<b>City</b>	Will return a list of all accounts that have specified text in their City. This field accepts either full or partial values.
<b>Country</b>	Will return a list of all accounts with the specified Country code.
<b>Postal Code</b>	Will return a list of all accounts that have specified text in their Postal Code. This field accepts either full or partial values.

To remove all filter criteria, choose [Clear](#).

5. Choose [Go](#).

Account holder information that matches all search criteria will be displayed in the [Accounts](#) list.

The amount of matches will be displayed in brackets at the top of the list.

If no accounts match the search criteria, a `No matching accounts found` error message is displayed.

6. Choose an item in the [Accounts](#) list

## Results

The [Select: Account](#) screen closes and the you are returned to the [Manage Issued Policies](#) screen, which lists the issued policies for that account holder. Selecting an issued policy in the list will take you to the [Policy Overview](#) screen.

## 6.2 Sorting the View

You can sort the issued policies in ascending or descending order.

### Procedure

1. Click the ☰ *Sort and Group* icon on the *Manage Issued Policies* screen.  
The *View Settings* dialog opens.
2. Choose whether to sort the policies in ascending or descending order.
3. Choose which column you want the policies sorted by. You can only choose one item. The columns include:
  - Policy Number
  - Status
  - Inception Date
  - Expiration Date
  - Role
  - Sales Product
4. Choose *OK*.

## 6.3 Filtering Transactions by Date

If there are multiple transactions on the *Policy Overview* screen, you can filter them by date.

### Procedure

1. Search for a policy.
2. Select a policy from the results list.  
The *Policy Overview* screen opens, displaying all of the transactions belonging to the policy.
3. Select the *View List Prior to Date* screen control.
4. Pick a date from the calendar.  
The display of transactions on screen is updated.

## Results

Only transactions with an Effective Date less or equal than the selected date are displayed on the screen. The information bar will be updated to indicate the count of transactions reflected by the filter.

### Note

The *Processed by* column on the screen indicates the user who created the application in FS-PM.


## Related Information

[Searching for an Issued Policy \[page 42\]](#)

## 6.4 Choosing the Columns to be Displayed

You can choose which columns to include on the *Manage Issued Policies* screen.

### Procedure

1. Choose the  *Settings* icon on the *Manage Policies* screen.  
The *Columns* dialog opens.
2. If you want all available columns to be displayed, choose *All*.
3. If you want to select or deselect individual columns, choose from the following options:
  - Policy Number
  - Status
  - Inception Date
  - Expiration Date
  - Sales Product
4. Choose *OK*.

## Results

The *Manage Issued Policies* screen will refresh to display only the columns that were selected.

## 6.5 Viewing the Details of an Issued Policy

### Procedure

1. In the Fiori Launchpad, choose **Manage Issued Policies**.  
The *Manage Issued Policies* screen appears.
2. Search for an issued policy, either by entering a policy number or by other search criteria.
3. Choose *Go*.
4. Select the policy from the *Policies* list.

### Results

The *Policy Overview* screen opens, displaying the policy details.

### Related Information

[Searching for an Issued Policy \[page 42\]](#)

## 6.6 Creating a Change Business Quote

You can make changes to a policy after it has been issued.

### Context

#### Note

This functionality is only available if it has been enabled in your product.

## Procedure

1. In the Fiori Launchpad, choose **Manage Issued Policies**.

The *Manage Issued Policies* screen appears.

2. Use the search functions to identify and select the relevant policy.

The *Policy Overview* screen opens.

3. Select *Create Change Business*.

The *Create Change Business Insurance Quote* screen opens.

4. Select a date from the *Change Business Effective Date* field.

This is a required field.

5. Enter text in the *Reason* field, to explain the reason for the change.

6. Choose *Next*.

A confirmation message is displayed.

7. Choose *Continue* to finalize the change business information and continue to update quote data.

The *Create Change Business Insurance Quote* screen opens.

8. Make the appropriate change to the policy.

For example, change the payment details or add an additional driver.

9. Select *Review*.

The *Change Business Insurance Quote* screen opens.

10. Choose *Generate Quote Letter*.

A quote letter showing the original quote and the change quote information is produced in PDF format and displayed in a new window. You can download and/or print the quote letter.

### Note

When the quote letter is generated, it will be valid for 30 days. The expiration period of the quote letter is configurable at the product level. After the quote letter is generated, choosing the *Generate Quote Letter* button again doesn't generate a new one but opens the generated one.

The status of the quote changes to Quoted. When you close the quote letter, the *Submit for Underwriting* button is now available.

11. Choose *Close*.

12. Choose *Submit for Underwriting*.

## Next Steps

Once underwriting is approved, issue the policy.

## 6.7 Discarding Change Business Transactions for a Policy

You can discard all change business transactions for a selected policy.

### Procedure

1. Search for a policy.
2. Select a policy from the results list.

The *Policy Overview* screen opens, displaying all of the transactions belonging to the policy.

3. Select the *Discard Change Business* button.

The *Continue* dialog box appears.

4. Choose *Continue*.

### Results

The transactions are discarded.

### Related Information

[Searching for an Issued Policy \[page 42\]](#)

# 7 Using My Insurance Worklist

With the *My Insurance Worklist* transactional App, you can view and manage all submissions the agents created.

For individual quotes, you can also view or edit the quote options for a chosen submission, convert a quick quote to a full quote, copy or delete a quote option, and compare up to five quote options at a time.

For quotes of other types, you can continue to work on them where you left.

## 7.1 Viewing and Deleting Submissions

You can view all submissions on a scrollable list. You can also delete submissions either individually or in bulk.

### Prerequisites

- All the options of the submission must be in status *working*.

#### ⓘ Note

Individual quote submissions can have more than one options, while other types of submission can have only one option.

### Procedure

- To view a submission, on the *My Insurance Worklist* screen, choose the row you want to view, or choose the > symbol at the end of each row.
- To delete a submission, on the *My Insurance Worklist* screen, select the checkbox next to the row you want to delete, and choose *Delete*.

## 7.2 Searching for and Filtering Submissions

You can search for and filter submissions in a worklist. You can choose the filter fields, save, and retrieve a variant.

### Context

The filter bar is hidden by default. Default filters include *Policyholder Name*, *Status*, and *Sales Product*. You can also use filters to hide or show columns in the *Quotes* table.

### Procedure

Go to the *My Insurance Worklist* screen and take action according to your purpose.

To	Do This
<b>Use filters to find a submission</b>	<ol style="list-style-type: none"><li>1. Choose <i>Show Filter Bar</i>.</li><li>2. To configure the filter bar to display the filters you want to appear, choose <i>Filters</i>. The <i>Filters</i> dialog box appears with a list of default filters.</li><li>3. Choose the filters you want to appear in the filter bar, and then choose <i>Go</i>.<ul style="list-style-type: none"><li>• To show a filter in the filter bar, select the checkbox next to the filter.</li><li>• To view all filters, choose <i>More Filters</i>, and choose or clear the filters you want to appear from the <i>Select Filters</i> dialog box. The following filters are available:<ul style="list-style-type: none"><li>• Effective Date</li><li>• Policyholder Name</li><li>• Status</li><li>• Type</li><li>• Transaction Type</li><li>• Submission Number</li><li>• Policyholder Address</li><li>• Sales Product</li><li>• Policy ID</li><li>• Master Policy ID</li></ul>The chosen filters appear in the filter bar.</li></ul></li><li>4. In the filter bar, enter or choose filtering criteria, and then choose <i>Go</i>. Matching results appear in the table.</li></ol>
<b>Use filters to hide or show columns</b>	<ol style="list-style-type: none"><li>1. Choose . The <i>Column</i> dialog box appears.</li><li>2. Choose which columns you want to appear in the <i>Quotes</i> table. The following filters are available:<ul style="list-style-type: none"><li>• Policyholder Name</li><li>• Policyholder Address</li></ul></li></ol>




To	Do This
	<ul style="list-style-type: none"> <li>• Submission Number</li> <li>• Type</li> <li>• Status</li> <li>• Transaction Type</li> <li>• Effective Date</li> <li>• Sales Product</li> <li>• Policy ID</li> <li>• Master Policy ID</li> </ul>

## 7.3 Sorting and Grouping Submissions

You can sort submissions in ascending or descending order. You can also group these submissions to more easily find the items you need. For example, if you want to see all submissions with the status of `Approved`, you can group these submissions together.

### Procedure

Go to the [My Insurance Worklist](#) screen and take action according to your purpose.

To	Do This
<b>Sort submissions in ascending or descending order</b>	<ol style="list-style-type: none"> <li>1. Choose  to view the <a href="#">Filter Work List</a> dialog box. You can do the following: <ul style="list-style-type: none"> <li>• Sort submissions in ascending or descending order on the Filter Worklist.</li> <li>• Choose which column you want the submissions sorted by. You can only choose one item. The columns include: <ul style="list-style-type: none"> <li>• Policyholder Name</li> <li>• Policyholder Address</li> <li>• Submission Number</li> <li>• Status</li> <li>• Type</li> <li>• Effective Date</li> <li>• Sales Product</li> <li>• Policy ID</li> <li>• Master Policy ID</li> </ul> </li> </ul> </li> <li>2. Choose <a href="#">OK</a> and the submissions are sorted accordingly.</li> </ol>
<b>Group submissions by preference</b>	<ol style="list-style-type: none"> <li>1. Choose  to view the <a href="#">Filter Work List</a> dialog box.</li> <li>2. Choose , and choose which attribute you want to group the results by. The attributes include: <ul style="list-style-type: none"> <li>• Policyholder Name</li> <li>• Policyholder Address</li> </ul> </li> </ol>

To	Do This
	<ul style="list-style-type: none"> <li>• Submission Number</li> <li>• Status</li> <li>• Type</li> <li>• Effective Date</li> <li>• Sales Product</li> <li>• Policy ID</li> <li>• Master Policy ID</li> <li>• None (default)</li> </ul>
	3. Choose <i>OK</i> and the submissions are grouped accordingly.

## 7.4 Managing Submissions

With the *My Insurance Worklist* App, you can find a submission and continue to work on it. For example, a submission you haven't completed but saved, or a submission that an underwriter has made decisions on.

### Procedure

1. Go to the *My Insurance Worklist* screen and find your individual quote submission by searching or filtering.

For instructions on how to search for or filter submissions, see [Searching for and Filtering Submissions \[page 50\]](#).

Matching results appear in the table.

2. Choose the row of the target submission or the > symbol at the end of its row.
  - For individual quotes, the *Create Insurance Quote* screen in read-only mode or the *Manage Quote Submission* screen appears depending on the submission status.
  - For quotes of other types, the screen where you last worked at appears.
3. **Optional:** Perform relevant tasks, such as those explained in the related information section.

### Related Information

[Using Create Insurance Quote \[page 7\]](#)

[Using Create Group Insurance Quote \[page 15\]](#)

[Using Create Master Insurance Quote \[page 28\]](#)

[Using Create Insurance Quote from Master \[page 33\]](#)

[Using Manage Issued Policies \[page 42\]](#)

[Searching for and Filtering Submissions \[page 50\]](#)

# 8 Using My Underwriting Worklist

With the *My Underwriting Worklist* transactional App, you can underwrite individual quotes, group quotes, and multi-individual quotes created in New Business process.

During underwriting, you can examine and evaluate the application information and supporting documents, and then accept or decline a quote. For individual quotes specifically, you can also counteroffer an option of the submission before making underwriting decisions, and request for improvement for one or more options when necessary.

By default, only underwriting cases with a status of *Underwriting* or *Needs More Information* will be displayed in the *Underwriting Worklist*. To view cases with other statuses, you can adjust the filter settings.

## ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

## 8.1 Understanding Underwriting Cases

In the underwriting workplace, an underwriting case is created for each option of an individual quote, each member of a group quote, or each individual quote of a multi-individual quote once the underwriting application is received.

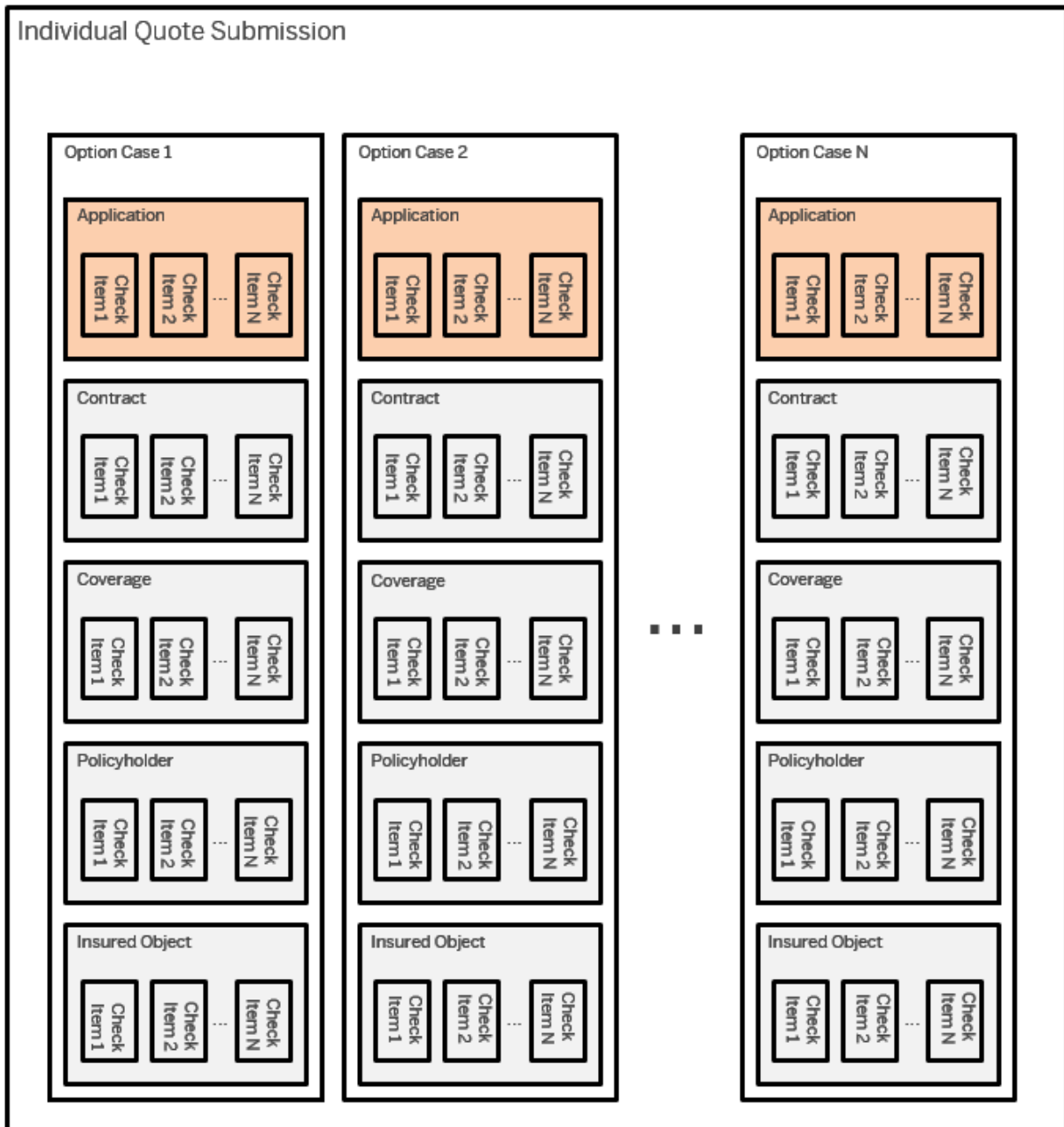
### 8.1.1 Understanding Individual Quote Submissions

An individual quote submission has one or more option cases.

Each option case has several underwriting items of the following types:

- Application
- Contract
- Coverage
- Policyholder
- Insured Object

The following figure illustrates this:



Individual Quote Submission

## Making Underwriting Decisions on an Option Case

To make an underwriting decision on an option case, you need to make decisions on the insurance application and its subordinate underwriting items.

You can make a decision on the insurance application only, on each of the other underwriting items, or on the insurance application and all of the other underwriting items at one time.

Each underwriting item may have one or more check items. You must complete all mandatory check items of an underwriting item before making a decision on the underwriting item.

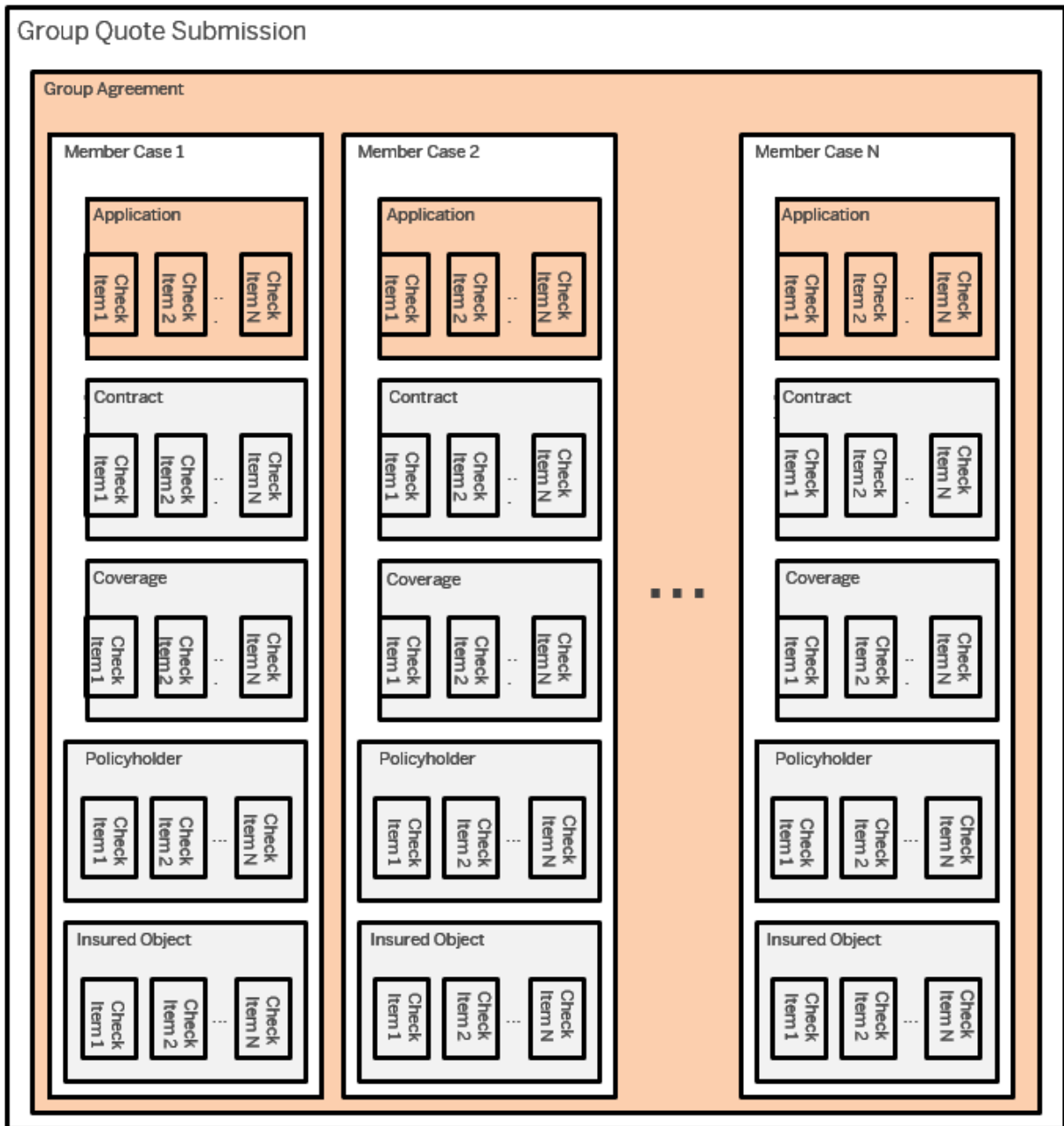
## 8.1.2 Understanding Group Quote Submissions

A group quote submission has one group agreement and normally multiple member cases.

Each member case has several underwriting items of the following types:

- Application
- Contract
- Coverage
- Policyholder
- Insured Object

The following figure illustrates this:



Group Quote Submission

When working with group quote submissions, you need to assign the group agreement before accepting or declining it.

## Making Underwriting Decisions on a Member Case

You can make a decision on the insurance application only, on each of the other underwriting items, or on the insurance application and all of the other underwriting items at one time.

Each underwriting item may have one or more check items. You must complete all mandatory check items of an underwriting item before making a decision on the underwriting item.

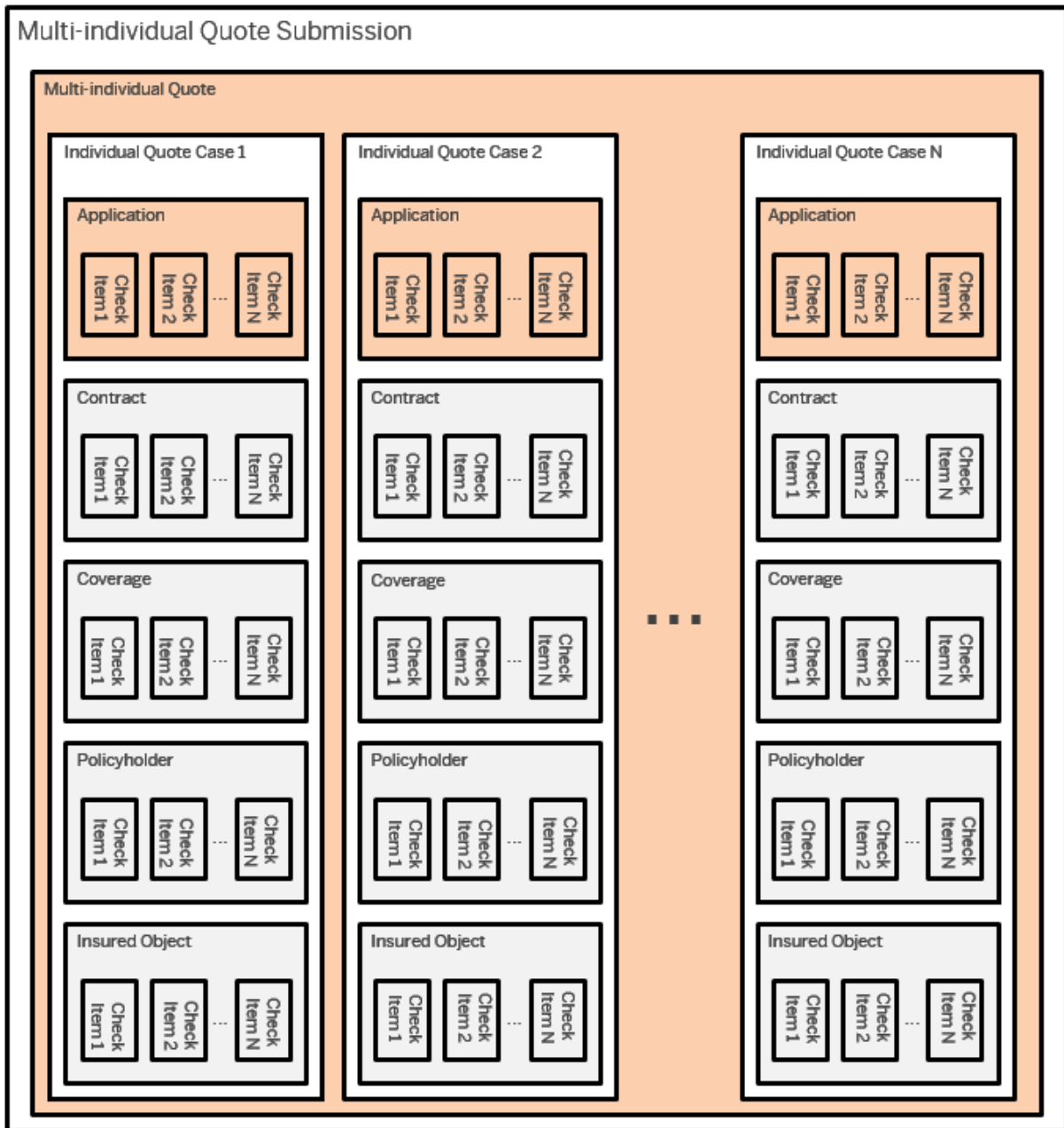
### **8.1.3 Understanding Multi-Individual Quote Submissions**

A multi-individual quote submission has one multi-individual quote and normally multiple individual quote cases.

Each individual quote case has several underwriting items of the following types:

- Application
- Contract
- Coverage
- Policyholder
- Insured Object

The following figure illustrates this:



Multi-individual Quote Submission

When working with multi-individual quote submissions, you need to assign the multi-individual quote before accepting or declining it.

## Making Underwriting Decisions on an Individual Quote Case

You can make a decision on the insurance application only, on each of the other underwriting items, or on the insurance application and all of the other underwriting items at one time.

Each underwriting item may have one or more check items. You must complete all mandatory check items of an underwriting item before making a decision on the underwriting item.

## 8.2 Finding a Submission for Underwriting

You can find a submission by filtering, searching, or using the two methods combined.

After you log on to the system and enter the *My Underwriting Worklist* app, which submissions you can see depends on which user group you are in. For more information about user group configuration, see [Data Visibility Configuration](#).

### 8.2.1 Finding a Submission for Underwriting by Filtering

You can find submissions with filters.

#### Context

##### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

#### Procedure

1. In the Fiori Launchpad, choose *My Underwriting Worklist*.

The *My Underwriting Worklist* screen appears.

2. Choose *Show Filter Bar*.

- To configure the filter bar to display the filters you want, choose *Filters* and choose or clear the filters.

The filters appear.

3. Specify a value for one or more of the following filters, and then choose *Go*.

- *Policyholder Name*: type or choose a policyholder name.
- *Submission Number*: enter a submission number.
- *Status*: choose from All, Approved, Needs More Information, Quoting, Quoted, Issued, Expired, Unapproved, Not Taken, Or Underwriting.
- *Type*: choose from All, Group, Multi-individual, Master, Or Individual.
- *Sales Product*: choose a specific product or All.

- *Policy ID*: enter a policy ID.
- *Master Policy ID*: enter a master policy ID.
- *Effective Date Range*: enter a starting and ending date for the *Effective Date* field. The default value is for the three months prior to and including the current date.

Matching results appear in the submission list.

## 8.2.2 Finding a Submission for Underwriting by Searching

You can find submissions with keywords.

### Context

#### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

1. In the Fiori Launchpad, choose *My Underwriting Worklist*.

The *My Underwriting Worklist* screen appears.

2. Enter one of the following keywords in the search box of the submission list, and then choose **Q** or press *Enter*.
  - Policyholder name
  - Submission status
  - Sales product name
  - Submission number

Matching results appear in the submission list.

## 8.3 Assigning or Reassigning Underwriting Cases

You must assign each underwriting case to yourself or other underwriters before you or they can make decisions on it.

Later, you can reassign your underwriting cases to other underwriters who are in the underwriting groups the cases are dispatched to. After you reassign the cases to other underwriters, you can't work on them anymore.

A submission contains the basic information that helps you decide whether to accept a quote or not. Each submission includes one or more underwriting cases: Individual Quote Submission, Group Quote Submission, or Multi-individual Quote Submission.

## Related Information

[Understanding Individual Quote Submissions \[page 53\]](#)

[Understanding Group Quote Submissions \[page 55\]](#)

[Understanding Multi-Individual Quote Submissions \[page 57\]](#)

### 8.3.1 Assigning a Case

You can assign just one option case, member case, or individual quote case to the user who will work on it.

## Context

### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

## Procedure

1. In the submission list, choose anywhere on the row of the target quote submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* for the target case.  
The case detail screen appears.
3. Choose *Assign to Me*.  
The owner of the case changes to you, and the case status changes to *In Process*.

## 8.3.2 Reassigning a Case

You can reassign an option case, member case, or individual quote case to the user who will work on it.

### Prerequisites

- Underwriting decisions haven't been made on the underwriting cases.

### Context

#### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* for the target case.  
The case detail screen appears.
3. Choose *Reassign*.  
The *Select Assignee* dialog box appears.
4. Choose another underwriter.  
The owner of each case changes to the chosen underwriter.

## 8.3.3 Assigning or Reassigning Several Cases

You can assign and reassign multiple cases to the user who will work on it at one time.

### Context

Follow this procedure for:

- Option cases
- Individual quote cases
- Member cases at the case level

#### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

1. In the submission list, choose anywhere on the row of the target quote submission.

The *Manage Submission* screen appears.

2. Choose the target case or cases, and then choose *Assign*.

The *Select Assignee* dialog box appears.

3. Choose yourself or another underwriter.

The owner of each case changes to you or the chosen underwriter, and the case status changes to *In Process*.

## 8.3.4 Assigning or Reassigning Multi-Individual Quotes and Cases

You can assign and reassign a multi-individual quote to the user who will work on it.

### Context

Follow this procedure for:

- Individual quote cases at the multi-individual quote level

- Multi-individual quotes

#### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

## Procedure

1. In the submission list, choose anywhere on the row of the target multi-individual quote submission.

The *Manage Submission* screen appears.

2. Choose *Assign Quote*.

The *Select Assignee* dialog box appears.

3. Choose yourself or another underwriter.

The multi-individual quote and all unassigned individual quote cases are assigned to you or the chosen underwriter.

#### ⓘ Note

Individual quote cases that were previously assigned to another underwriter won't be assigned to you.

## 8.3.5 Assigning or Reassigning Group Agreements

You can assign and reassign the group agreements and cases to the user who will work on it.

### Context

Follow this procedure for:

- Member cases at the group level
- Group agreements

#### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

## Procedure

1. In the submission list, choose anywhere on the row of the target group quote submission.

The *Manage Submission* screen appears.

2. Choose *Assign Group Agreement*.

The *Select Assignee* dialog box appears.

3. Choose yourself or another underwriter.

The group agreement and all unassigned member cases are assigned to you or the chosen underwriter.

### Note

Member cases previously assigned to another underwriter won't be assigned to you.

## 8.4 Evaluating Underwriting Cases

Evaluating underwriting cases is important for making underwriting decisions. Related information under different categories can help you perform the evaluation.

When you choose *Underwrite* for one of your underwriting cases, the case detail screen appears. The left panel shows the header information of each underwriting item, for example, the name, type, number of violations, and underwriting decision status. The insurance application of this case always shows as the first item by default. You can use the buttons to sort, filter, or group the items.

You can view the details of each item on the right panel, including the information on the following tab pages:

- Violations: violations identified in system underwriting.
- Checklist: check items recommended by system underwriting.
- Evidences: additional evidences for the underwriting item.
- Basic Info: the basic information of the insurance application, such as the premium breakdown.
- Activity Log: audit trail for actions performed by underwriters on the underwriting item.

### 8.4.1 Performing a Risk Analysis

The underwriters can use the basic risk analysis function to evaluate the underwriting items.

## Prerequisites

- You are on the case detail screen of an option case or a member case.

## Context

### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.


## Procedure

Take action according to your purpose.

To	Do This
<b>Review the basic information of the insurance application</b>	<ol style="list-style-type: none"><li>1. Choose the insurance application from the left panel. The details appear on the right panel.</li><li>2. Review the basic information on the <i>Basic Info</i> tab page.</li></ol>
<b>Review the violations of an underwriting item</b>	<ol style="list-style-type: none"><li>1. Choose an underwriting item from the left panel. The details appear on the right panel.</li><li>2. Review the violations on the <i>Violations</i> tab page.</li></ol>
<b>Complete the check items of an underwriting item</b>	<ol style="list-style-type: none"><li>1. Choose an underwriting item on the left panel. The details appear on the right panel.</li><li>2. Choose the <i>Checklist</i> tab. The <i>Checklist</i> tab page appears.</li><li>3. Choose the check mark of each check item. <div data-bbox="622 1332 726 1366" data-label="Section-Header"><h3>ⓘ Note</h3></div><div data-bbox="622 1377 1102 1408" data-label="Text"><p>Each mandatory check item must be completed.</p></div><p>The <i>Confirmation</i> dialog box appears.</p></li><li>4. Choose <i>OK</i>. The check item is completed.</li><li>5. Repeat the steps above to complete the check items for other underwriting items.</li></ol>

The messages for violations and checklists are maintained in FS-PRO product components in the domain tables. These messages are in several different languages.

## Next Steps

- To view the application data captured in the quote, choose  on the case detail screen, and then choose *Show Application*.

## 8.4.2 Managing Evidences

You can manage evidences related to the underwriting case.

### Prerequisites

- You are on the case detail screen of an option, member, or individual quote case.
- The quote option has been assigned to you, and its status is `In Process`.

### Context

The evidence will be attached to the policy, coverage or contract component that was selected.

#### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure



1. Choose an underwriting item from the left panel.  
The details appear on the right panel.
2. Choose the *Evidences* tab.  
The *Evidences* tab page appears.
3. Choose **+** in the toolbar.  
The *Manage Evidence* dialog box appears.
4. Choose *Browse* to choose the evidence, choose an evidence type and the permission level, and then choose *Upload*.
  - To cancel the operation, choose *Close*.

The added evidence appears in the evidence list with the following information displayed:

- Uploaded by
- Date of uploading
- Evidence type
- Permission level
- Business object level the evidence is on

An *Add Evidence* item is added to the *Activity Log*, detailing the evidence's file name.

## Next Steps

- To search for an evidence, enter the evidence name in the search box on the [Evidences](#) tab page, and then choose .
- To download an evidence, choose  for that evidence.

## 8.5 Counteroffering

For individual quotes, you have an extra option after evaluating them: counteroffering an option of an individual quote submission.

When underwriting an individual quote, you can counteroffer an option. By doing so, you can generate a new option based on the one you choose to counteroffer and send it back for customer's consideration.

### 8.5.1 Counteroffering an Option on the Underwriting Item Screen

You can counteroffer an option on the [Underwriting Item](#) screen.

#### Prerequisites

- The option has not been requested for improvement.

#### Context

##### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

#### Procedure

1. In the submission list, choose anywhere on the row of the target individual quote submission.  
The [Manage Submission](#) screen appears.

2. Choose *Underwrite* for the target option case.

The *Underwriting Item* screen appears.

3. Choose *Counteroffer*.

The *Producer Application* screen appears.

4. Edit any information you want to change, and then choose *Save*.

The updated information is saved.

5. Choose *Simulate Underwriting*.

If the underwriting simulation fails, the error message will appear on the case details screen. You must fix the problems indicated in the error messages to continue.

6. Choose *Review*.

The *Review Counteroffer* screen appears.

7. Review the premium breakdown of the counteroffer, and then choose *Submit Counteroffer*.

The *Submit Counteroffer* dialog box appears.

8. Choose a reason, enter your comments, and then choose *Submit*.

The counteroffer is created and appears on the *Manage Submission* screen.

## 8.6 Making Underwriting Decisions

You can make underwriting decisions on individual quote submissions, group quote submissions, and multi-individual quote submissions.

You can make one of the following decisions:

- Request for improvement (for individual quote submissions only)
- Accept
- Decline

### Related Information

[Understanding Individual Quote Submissions \[page 53\]](#)

[Understanding Group Quote Submissions \[page 55\]](#)

[Understanding Multi-Individual Quote Submissions \[page 57\]](#)

## 8.6.1 Requesting Improvements

### 8.6.1.1 Requesting Improvements for an Insurance Application

Each option case has an insurance application. You can request improvements for the insurance application only, not including its underwriting items.

#### Prerequisites

- You haven't accepted or declined the insurance application or the individual quote.

#### Context

##### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

##### ⓘ Note

You can accept the insurance application and all of the other underwriting items at one time. For more information, see [Requesting Improvements for an Insurance Application and Underwriting Items \[page 72\]](#).

#### Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* on the row of the target option case.  
The case detail screen appears.
3. Choose the application item from the left panel, and then choose *Needs Improvement*.  
The *Improve Underwriting Items* dialog box appears.
4. Choose a reason, write your comments, and then choose *OK*.

##### ⓘ Note

Agent users can see the reason and comments in the *My Insurance Worklist* App. The reasons are configured in FS-PRO.

The option case is requested for improvement, and the case status changes to *Needs More Information*.

## Related Information

[Requesting Improvements for an Insurance Application and Underwriting Items \[page 72\]](#)

### 8.6.1.2 Requesting Improvements for an Underwriting Item

Each option case has several underwriting items. You can request improvements for an underwriting item other than the insurance application.

## Prerequisites

- You haven't accepted or declined the underwriting item or the individual quote.

## Context

### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

## Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* on the row of the target option case.  
The case detail screen appears.
3. Choose an underwriting item other than the insurance application item from the left panel, and then choose *Needs Improvement*.  
The *Improve Underwriting Items* dialog box appears.
4. Choose a reason, write your comments, and then choose *OK*.

### 8.6.1.3 Requesting Improvements for an Insurance Application and Underwriting Items

Each option case has an insurance application and several underwriting items. You can request improvements for the insurance application and all of the other underwriting items.

#### Prerequisites


- You haven't accepted or declined the insurance application, any underwriting item or the individual quote.

#### Context

##### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

#### Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* on the row of the target option case.  
The case detail screen appears.
3. Choose  from the left panel.  
A checkbox appears beside the application and each underwriting item.
4. Select the application and all of the other underwriting items, and then choose *Needs Improvement*.  
The *Improve Underwriting Items* dialog box appears.
5. Choose a reason, write your comments, and then choose *OK*.

##### ⓘ Note

Agent users can see the reason and comments in the *My Insurance Worklist* App. The reasons are configured in FS-PRO.

The insurance application and all of the other underwriting items are requested for improvement.

## 8.6.2 Accepting or Declining an Insurance Application

Each option case, member case, and individual quote case has an insurance application. You can accept or decline just the insurance application.

### Prerequisites

- (For accepting the insurance application only) You have accepted all underwriting items other than the insurance application.

### Context

#### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

#### ⓘ Note

You can accept the insurance application and all of the other underwriting items at one time. For more information, see [Accepting or Declining an Insurance Application and Underwriting Items \[page 75\]](#).

### Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* on the row of the target case.  
The case detail screen appears.
3. Choose the application item from the left panel, and then choose *Accept* or *Decline*.

#### ⓘ Note

To accept the insurance application, you must accept all of the other underwriting items before. However, you can decline an insurance application directly regardless of the statuses of all the other underwriting items.

The *Accept Underwriting Items* or *Decline Underwriting Items* dialog box appears.

4. Choose a reason, write your comments, and then choose *OK*.

#### Note

Agent users can see the reason and comments in the *My Insurance Worklist* App. The reasons are configured in FS-PRO.

The case is accepted or declined, and the case status changes to *Accepted* or *Declined*.

## Related Information

[Accepting or Declining an Insurance Application and Underwriting Items \[page 75\]](#)

### 8.6.3 Accepting or Declining an Underwriting Item

Each option case, member case, and individual quote case has several underwriting items. You can accept or decline an underwriting item without accepting or declining insurance application.

## Prerequisites

- You have completed all mandatory check items on the *Checklist* tab page.

## Context

#### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

## Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* on the row of the target case.  
The case detail screen appears.
3. Choose the underwriting item other than the insurance application item from the left panel, and then choose *Accept* or *Decline*.  
The *Accept Underwriting Items* or *Decline Underwriting Items* dialog box appears.

4. Choose a reason, write your comments, and then choose *OK*.

#### Note

Agent users can see the reason and comments in the *My Insurance Worklist* App. The reasons are configured in FS-PRO.

## 8.6.4 Accepting or Declining an Insurance Application and Underwriting Items

Each option case, member case, and individual quote case has an insurance application and several underwriting items. You can accept or decline the insurance application and all of the other underwriting items at the same time.

### Prerequisites


- You have completed all mandatory check items on the *Checklist* tab page.

### Context

#### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

1. In the submission list, choose anywhere on the row of the target submission.  
The *Manage Submission* screen appears.
2. Choose *Underwrite* on the row of the target case.  
The case detail screen appears.
3. Choose  from the left panel.  
A checkbox appears beside the application and each underwriting item.
4. Select the application and all of the other underwriting items, and then choose *Accept* or *Decline*.  
The *Accept Underwriting Items* or *Decline Underwriting Items* box appears.
5. Choose a reason, write your comments, and then choose *OK*.

#### ⓘ Note

Agent users can see the reason and comments in the *My Insurance Worklist* App. The reasons are configured in FS-PRO.

The insurance application and all of the other underwriting items are accepted or declined.

## 8.6.5 Accepting or Declining Group Agreements

You need to make an underwriting decision on the group agreement before you can issue the group quote.

### Prerequisites

- The group agreement has been assigned to you.

### Context

Follow this procedure for:

- Member cases on the group level
- Group agreements

#### ⓘ Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

1. In the submission list, choose anywhere on the row of the target group quote submission.

The *Manage Submission* screen appears.

2. Choose *Accept Group Agreement* or *Decline Group Agreement*.

The *Accept Group Agreement* or *Decline Group Agreement* dialog box appears.

3. Choose a reason, write your comments, and then choose *Accept* or *Decline*.

The group agreement or member cases are accepted or declined. If applicable, the submission status changes to *Approved* or *Unapproved*.

### Note

All the member cases with the status of `In Process` will be approved or declined when you accept or decline the group agreement.

## 8.6.6 Accepting or Declining Multi-Individual Quotes

You need to make an underwriting decision on the multi-individual quote itself before you can issue the multi-individual quote.

### Prerequisites

- The multi-individual quote has been assigned to you.

### Context

Follow this procedure for:

- Individual quote cases on the multi-individual quote level
- Multi-individual quotes

### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

1. In the submission list, choose anywhere on the row of the target multi-individual quote submission.

The *Manage Submission* screen appears.

2. Choose *Accept Quote* or *Decline Quote*.

The *Accept Quote* or *Decline Quote* dialog box appears.

3. Choose a reason, write your comments, and then choose *Accept* or *Decline*.

The multi-individual quote or individual quote cases are accepted or declined. If applicable, the submission status changes to `Approved` or `Unapproved`.

### Note

All the multi-individual quote cases with the status of `In Process` will be approved or declined when you accept or decline the multi-individual quote.

## 8.7 Reviewing the Activity Log and Using Notes

The activity log and notes can help you gain more information about the underwriting cases.

You can review the activity log to see a history of activities of an underwriting case and use notes to communicate with other underwriters.

### 8.7.1 Reviewing the Activity Log

Operations performed for the insurance application and all underwriting items will be logged and ready for review.

#### Context

This function provides an audit trail (when, who, what, where) of the operations performed against an underwriting case. The operations performed for an underwriting item are logged for both the underwriting item and its insurance application. The operations performed for an insurance application are logged for the application only.

The following activities will be logged:

- Completing a check item
- Adding or deleting evidences
- Making a decision
- Reassigning a case

### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

#### Procedure

1. Choose the insurance application or another underwriting item from the left panel.

The details appear on the right panel.

2. Choose the *Activity Log* tab.  
The *Activity Log* tab page appears.
3. Review the activity history.

## 8.7.2 Using Notes

You can communicate with other underwriters or agents by sending and receiving notes. You can also add an attachment in the note.



### Context

#### Note

The options that are visible in underwriting applications are determined by your permissions. Consult your system administrator if the features available to you in the app are not sufficient for your workflow.

### Procedure

Take action according to your purpose.

To	Do This
<b>Send a note</b>	<ol style="list-style-type: none"> <li>1. Choose <i>Notes</i>. The <i>Notes</i> dialog box appears.</li> <li>2. In the <i>Message Inbox</i> section of the dialog box, choose <b>+</b>. The <i>Select Contact</i> dialog box appears.</li> <li>3. Choose a contact, and then enter your message.</li> </ol> <div data-bbox="416 1547 1394 1648" style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 5px;"> <p><b> Note</b> Only users from the group to which the current case is assigned are included in the contact list.</p> <ul style="list-style-type: none"> <li>• To add an attachment, choose  and attach the item.</li> </ul> <p>The note is sent to the receiver.</p> </div>
<b>Open a re- ceived note</b>	<ol style="list-style-type: none"> <li>1. Choose <i>Notes</i>. The <i>Notes</i> dialog box appears.</li> <li>2. In the <i>Message Inbox</i> section of the dialog box, choose the unread message.</li> </ol>
<b>Open a re- ceived note (for individual quotes only)</b>	<ol style="list-style-type: none"> <li>1. On the <i>Manage Submission</i> screen of the target submission, choose the message <i>You have {0} notification</i> or <i>You have {0} notifications</i>. The <i>Unread Notes</i> dialog box appears.</li> </ol>

**To**

**Do This**

---

2. Choose a note for an option.  
The *Notes* dialog box appears.
  3. In the *Message Inbox* section of the dialog box, choose the unread message.
-

# 9 Using My Insurance Tasks

With the *My Insurance Tasks* transactional App, you can identify the difference between a standalone and a transaction task, retrieve the list of standalone or transaction tasks that were previously created, and create, update, or delete a standalone or transaction task.

There are two types of insurance tasks:

- Standalone task—a piece of work on a quotation that is to be completed.
- Transaction task—a task that is only associated to a particular submission. This type of task can be mandatory or optional. A submission cannot be issued until all of the mandatory tasks associated with the submission are completed.

## 9.1 Accessing Tasks

To retrieve standalone or transaction tasks, you can go to the *My Insurance Tasks* app on the Fiori Launchpad, or you can access a list of transaction tasks within a particular submission.

### Procedure

You can access tasks with one of the following ways:

To	Do This
<b>Access tasks from <i>My Insurance Tasks</i></b>	<ol style="list-style-type: none"><li>1. In the Fiori Launchpad, choose <i>My Insurance Tasks</i>. The <i>My Insurance Tasks</i> screen appears.</li><li>2. In the <i>Tasks</i> worklist, choose the task you want to review, and take action accordingly:<ul style="list-style-type: none"><li>• Create, edit, or delete tasks</li><li>• Reopen or complete tasks</li><li>• Sort tasks in ascending or descending order</li><li>• Group tasks by certain criteria</li></ul></li></ol>
<b>Access tasks within a submission</b>	<p>In the <i>Review Quote</i> screen or the <i>Manage Quote Submission</i> screen of a submission, choose the message strip which indicates the number of transaction tasks associated to the submission. The message reads:</p> <p>There are &lt;#&gt; tasks associated with this submission.</p> <div style="border: 1px solid #ccc; padding: 5px;"><p><b>Note</b></p><p>The message strip only appears if there is at least one transaction task associated to the submission.</p></div>

To	Do This
	The <a href="#">Manage Tasks</a> dialog box appears with a list of tasks on which you can work.

## 9.2 Creating Tasks

You can create tasks from [My Insurance Tasks](#), or you can also create tasks within a submission.

### Procedure

1. Take action according to your purpose:

To	Do This
Create tasks from <a href="#">My Insurance Tasks</a>	On the <a href="#">My Insurance Tasks</a> screen, choose <b>+</b> .
Create tasks within a submission	On the <a href="#">Review Quote</a> screen or the <a href="#">Manage Quote Submission</a> screen of a submission, choose <a href="#">Create Task</a> .

The [Create New Task](#) dialog box appears.

2. Enter the subject and a detailed description of the task.
3. Enter the date this task must be completed.
4. Choose the person you want to assign the task to from the [Select Assignee](#) dialog box.
5. Indicate whether the task is [Low](#), [Medium](#), or [High](#) priority.
6. **Optional:** If the task is mandatory, choose [Yes](#) in the [Mandatory](#) field.
7. Choose [OK](#).
  - To cancel the operation, choose [Cancel](#).

## 9.3 Editing Tasks


You can edit tasks from [My Insurance Tasks](#), or you can also edit tasks within a submission.

### Prerequisites

- The status of the task is [Open](#).

## Procedure

1. Take action according to your purpose:

To	Do This
<b>Edit tasks from <i>My Insurance Tasks</i></b>	<p>On the <i>My Insurance Tasks</i> screen, select the checkbox next to the task you want to edit, and choose <i>Edit</i>.</p> <p>The <i>Edit Task</i> dialog box appears.</p> <div><p><b>Note</b></p><p>To reopen a task with the status of completed, see <a href="#">Reopening and Completing Tasks [page 84]</a>.</p></div>
<b>Edit tasks within a submission</b>	<ol style="list-style-type: none"><li>1. On the <i>Review Quote</i> screen or the <i>Manage Quote Submission</i> screen of a submission, choose the message at the top of the screen indicating that there are tasks associated to this submission. The <i>Manage Tasks</i> dialog box appears with a list of available tasks.</li><li>2. For the task you want to edit, choose  to open the <i>Edit Task</i> dialog box.</li></ol>

2. In the *Edit Task* dialog box, update the information for the task, and then choose *Save*.

### Note

The *Submission Number* is populated and the *Mandatory* field is editable for a transaction task.

## Related Information


[Reopening and Completing Tasks \[page 84\]](#)

## 9.4 Deleting Tasks

You can delete tasks from *My Insurance Tasks* or from within a submission.

## Procedure

You can delete tasks with one of the following ways:

To	Do This
<b>Delete tasks from <i>My Insurance Tasks</i></b>	<ol style="list-style-type: none"> <li>1. On the <i>My Insurance Tasks</i> screen, select the checkbox next to the task you want to delete, and choose <i>Delete</i>. You receive a confirmation message that the task was successfully deleted.</li> <li>2. In the <i>Success</i> dialog box, choose <i>OK</i>.</li> </ol>
<b>Delete tasks within a submission</b>	<ol style="list-style-type: none"> <li>1. On the <i>Review Quote</i> screen or the <i>Manage Quote Submission</i> screen of a submission, choose the message at the top of the screen indicating that there are tasks associated to this Submission. The <i>Manage Tasks</i> dialog box appears with a list of available tasks.</li> <li>2. For the task you want to delete, choose .</li> <li>3. You receive a confirmation message that the task was successfully deleted.</li> <li>3. In the <i>Success</i> dialog box, choose <i>OK</i>.</li> </ol>

## 9.5 Reopening and Completing Tasks

You can open tasks that have already been completed if you need to continue work on that task. Once the task is updated and completed, you mark the task as completed in the system.

### Procedure

1. On the *My Insurance Tasks* screen, on the row of the task you want to reopen, choose *Reopen Task*.  
The status of the task changes to `Open` and the option to complete the task is now available.
2. **Optional:** Once the task is completed, choose *Complete Task* and the status changes to `Completed`.

## 9.6 Searching for and Filtering Tasks

You can search for and filter tasks for a submission. The filter bar is hidden by default. Default filters are available so you can search for tasks more easily.

### Procedure

1. **Optional:** On the *My Insurance Tasks* screen, choose *Show Filter Bar*.
2. **Optional:** To configure the filter bar to display the filters you want to appear, choose *Filters*.  
The *Filters* dialog box appears with a list of default filters.
3. **Optional:** Choose the filters you want to appear in the filter bar, and then choose *Go*.

- To add filter options to the filter bar, select the checkbox next to the filter.
- To view the full list of filters, choose [More Filters](#), and choose or clear the filters you want to appear from the [Select Filters](#) dialog box. The following filters are available:
  - Priority
  - Status
  - Submission Number
  - Mandatory
  - Subject

The chosen filters appear in the filter bar.

4. Enter or choose filtering criteria, and then choose [Go](#).



Matching results appear in the table.

## 9.7 Sorting and Grouping Tasks

You can sort tasks in ascending or descending order. You can also group tasks to more easily find the tasks you need. For example, if you want to see all tasks with the status of `Completed`, you can group these tasks together.

### Procedure

Take action according to your purpose:

To	Do This
<b>Sort tasks in ascending or descending order</b>	<ol style="list-style-type: none"> <li>1. On the <a href="#">My Insurance Tasks</a> screen, choose  to view the <a href="#">Filter Tasks List</a> dialog box. You can do the following:               <ul style="list-style-type: none"> <li>• Sort tasks in ascending or descending order.</li> <li>• Choose which column you want the tasks sorted by. You can only choose one item. The columns include:                   <ul style="list-style-type: none"> <li>• Subject</li> <li>• Due Date</li> <li>• Overdue</li> <li>• Priority</li> <li>• Status</li> <li>• Submission Number</li> <li>• Mandatory</li> </ul> </li> </ul> </li> <li>2. Choose <a href="#">OK</a> and the tasks are sorted accordingly.</li> </ol>
<b>Group tasks by preference</b>	<ol style="list-style-type: none"> <li>1. On the <a href="#">My Insurance Tasks</a> screen, from the <a href="#">Filter Task List</a> dialog box, choose , and choose which attribute you want to group the results by. The attributes include:               <ul style="list-style-type: none"> <li>• Subject</li> </ul> </li> </ol>

To

Do This

---

- Due Date
- Overdue
- Priority
- Status
- Submission Number
- Mandatory
- None

2. Choose *OK* and the tasks are grouped accordingly.

---

# 10 Reference: Status Types

## 10.1 Quote Option Statuses

Quote options can be in various statuses. Users' action may change the status.

Quote Option Statuses

Status	Behavior	If	Changes To
Working (Initial status for newly created option)	Editable (For the assignee only)	The agent generates a quote letter	Quoted
Quoted	Uneditable	The agent submits the quote for underwriting and violations are found	Referred
Quoted	Uneditable	The agent submits the quote for underwriting and the underwriter accepts it	Approved
Quoted	Uneditable	The agent submits the quote for underwriting and the underwriter declines it	Disapproved
Referred	Uneditable	The underwriter accepts the option	Approved
Referred	Uneditable	The underwriter declines the option	Disapproved
Referred	Uneditable	The underwriter requests for improvement for the option	Needs More Information
Approved	Uneditable	The agent generates a quote letter	Quoted

### ⓘ Note

Only applies when the quote letter generation step is configured to be after the submitting for underwriting step.

Status	Behavior	If	Changes To
Approved	Uneditable	The agent issues it as a policy	Issued
		<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Note</b></p> <p>Only applies when the quote letter generation step is configured to be before the submitting for underwriting step.</p> </div>	
Needs More Information	Editable	The agent submits the quote for underwriting again after making improvements	Referred
Disapproved	Uneditable	N/A	N/A
Rejected	Uneditable	N/A	N/A
Issued	Uneditable	N/A	N/A
Converted	Uneditable	N/A	N/A

(For quick quotes only)

**Note**

For CBC-relevant products, if you request Cash Before Cover payment for an option, the status of all other options will change to **Rejected** unless it was **Disapproved**.

## Related Information

[Submission Statuses \[page 88\]](#)

## 10.2 Submission Statuses

Before an individual insurance policy is issued, a submission (potential policy) goes through various stages of the process. The submission status indicates where a submission is within that process.

Each submission can have one or more quote options, but only one of them can be issued as a policy. The derived submission statuses are the ones you actually see in the worklist, which are decided by the submission status and the statuses of its quote options or the group agreement status.

Submission Statuses

Derived Submission Status	Conditions for Individual Quotes and Master Insurance Quotes (Option Status)	Conditions for Group Quotes and Multi-Individual Quotes (Group Agreement Status)
Quoting	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Working and each of the rest is one of the following:                             <ul style="list-style-type: none"> <li>• Working</li> <li>• Disapproved</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• Group agreement status is Working.</li> </ul>
Not Taken	<ul style="list-style-type: none"> <li>• Submission status is Not Taken.</li> </ul>	Not implemented
Underwriting	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Referred and each of the rest is one of the following:                             <ul style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Disapproved</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• Group agreement status is Referred.</li> </ul>

Derived Submission Status	Conditions for Individual Quotes and Master Insurance Quotes (Option Status)	Conditions for Group Quotes and Multi-Individual Quotes (Group Agreement Status)
Approved (non-CBC relevant products)	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Approved and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• Group agreement status is Approved.</li> </ul>
	<p><b>Note</b></p> <p>Only applies when the quote letter generation step is configured to be after the submitting for underwriting step.</p>	
	<ul style="list-style-type: none"> <li>• At least one option is Approved and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> <li>• Quoted</li> </ul> </li> </ul>	
	<p><b>Note</b></p> <p>Only applies when the quote letter generation step is configured to be before the submitting for underwriting step.</p>	
Approved (CBC relevant products)	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• One option is Approved and each of the rest is Disapproved.</li> <li>• The Cash Before Cover payment is settled in FS-CD.</li> </ul>	Not implemented

Derived Submission Status	Conditions for Individual Quotes and Master Insurance Quotes (Option Status)	Conditions for Group Quotes and Multi-Individual Quotes (Group Agreement Status)
Pending CBC Request (Applies to CBC-relevant products only)	<div data-bbox="627 443 986 544" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note</b> Applies to individual quotes only.</p> </div> <ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Approved and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> </ul> </li> </ul> <div data-bbox="651 969 986 1171" style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Note</b> Only applies when the quote letter generation step is configured to be after the submitting for underwriting step.</p> </div> <ul style="list-style-type: none"> <li>• At least one option is Approved and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> <li>• Quoted</li> </ul> </li> </ul> <div data-bbox="651 1585 986 1787" style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Note</b> Only applies when the quote letter generation step is configured to be before the submitting for underwriting step.</p> </div> <ul style="list-style-type: none"> <li>• The Cash Before Cover payment hasn't been requested.</li> </ul>	Not implemented

Derived Submission Status	Conditions for Individual Quotes and Master Insurance Quotes (Option Status)	Conditions for Group Quotes and Multi-Individual Quotes (Group Agreement Status)
Pending Payment (Applies to CBC-relevant products only)	<div data-bbox="624 443 987 544"> <p><b>Note</b> Applies to individual quotes only.</p> </div> <ul data-bbox="612 566 975 947" style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Approved and each of the rest is one of the following:               <ul data-bbox="655 719 855 947" style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> </ul> </li> </ul> <div data-bbox="655 969 987 1171"> <p><b>Note</b> Only applies when the quote letter generation step is configured to be after the submitting for underwriting step.</p> </div> <ul data-bbox="612 1178 975 1559" style="list-style-type: none"> <li>• At least one option is Approved and each of the rest is one of the following:               <ul data-bbox="655 1285 855 1559" style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> <li>• Quoted</li> </ul> </li> </ul> <div data-bbox="655 1581 987 1783"> <p><b>Note</b> Only applies when the quote letter generation step is configured to be before the submitting for underwriting step.</p> </div> <ul data-bbox="612 1789 975 1848" style="list-style-type: none"> <li>• The Cash Before Cover payment has been requested.</li> </ul>	Not implemented

Derived Submission Status	Conditions for Individual Quotes and Master Insurance Quotes (Option Status)	Conditions for Group Quotes and Multi-Individual Quotes (Group Agreement Status)
<div style="border-left: 2px solid #0070C0; padding-left: 10px;"> <p><b>Note</b></p> <p>This action changes the status of other options to Rejected unless it was Disapproved.</p> </div>		
Needs More Information	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Needs More Information and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Referred</li> <li>• Working</li> <li>• Needs More Information</li> <li>• Disapproved</li> </ul> </li> </ul>	Not implemented
Unapproved	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• All options are Disapproved.</li> </ul>	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• Group agreement status is Disapproved.</li> </ul>

Derived Submission Status	Conditions for Individual Quotes and Master Insurance Quotes (Option Status)	Conditions for Group Quotes and Multi-Individual Quotes (Group Agreement Status)
Quoted	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• At least one option is Quoted and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Quoted</li> <li>• Referred</li> <li>• Working</li> <li>• Approved</li> <li>• Needs More Information</li> <li>• Disapproved</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Submission status is Working.</li> <li>• Group agreement status is Quoted.</li> </ul>
	<p><b>Note</b></p> <p>Only applies when the quote letter generation step is configured to be after the submitting for underwriting step.</p>	
	<ul style="list-style-type: none"> <li>• At least one option is Approved and each of the rest is one of the following:               <ul style="list-style-type: none"> <li>• Quoted</li> <li>• Referred</li> <li>• Working</li> <li>• Needs More Information</li> <li>• Disapproved</li> </ul> </li> </ul>	
	<p><b>Note</b></p> <p>Only applies when the quote letter generation step is configured to be before the submitting for underwriting step.</p>	
Issued	<ul style="list-style-type: none"> <li>• Submission status is Closed.</li> <li>• One option is Issued.</li> </ul>	<ul style="list-style-type: none"> <li>• Submission status is Closed.</li> <li>• Group agreement status is Issued.</li> </ul>

## Related Information

[Quote Option Statuses \[page 87\]](#)

# 11 Troubleshooting

Some tips for resolving browser-based issues encountered while using Fiori apps.

Occasionally, you may encounter the following errors when using Fiori apps:

- Could not open app. Try again later.
- Service Failed. Contact your system administrator.

If this occurs, clear your browser cache and log in again.

In Firefox, you may have to manually import a security certificate from the Fiori app server.



For detailed instructions on these tasks, see your browser's help files.

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