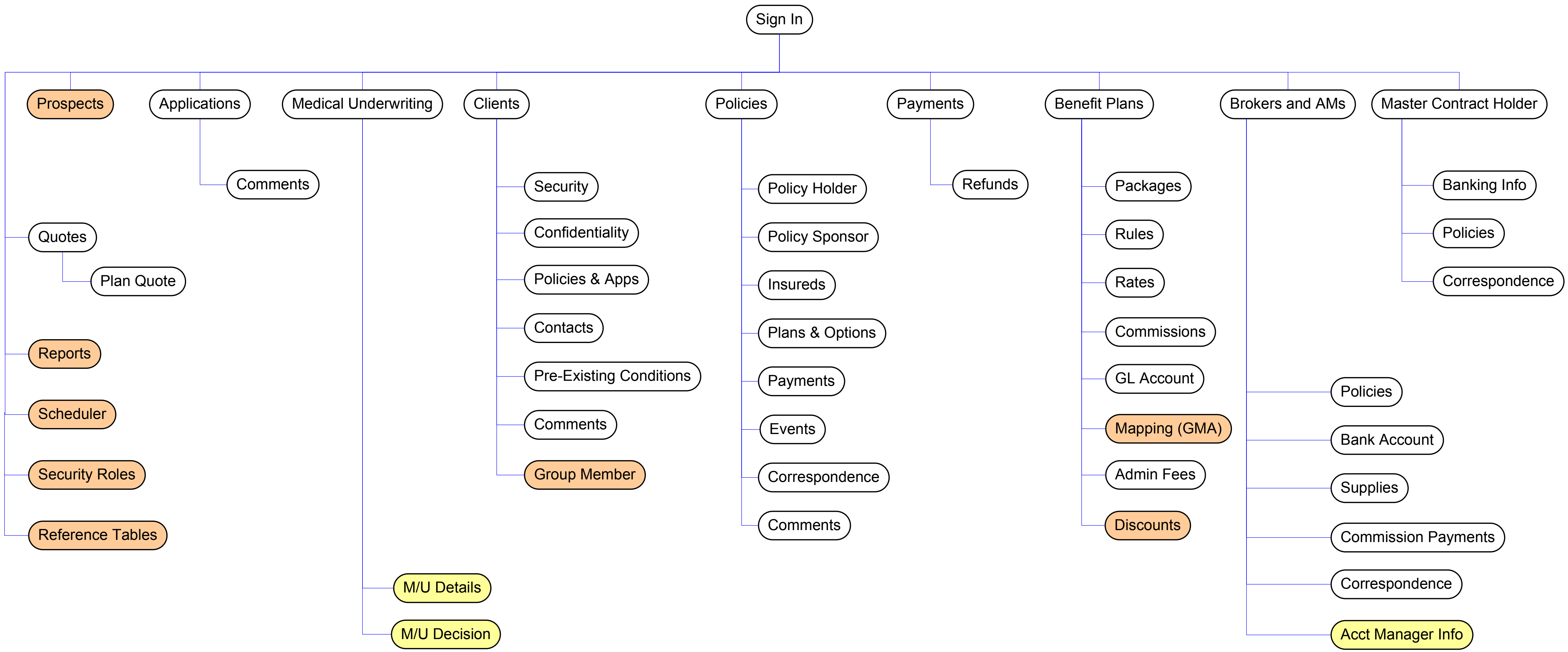
Structure Map & Wireframes

This document contains a structure map (or navigation map) and screen wireframes to establish the information structure of the application/system. These layouts do not represent the final screen designs. These wireframes should be used to assist with the refinement of requirements documents and in the creation of the user interface prototype designs.

Last Updated 10/27/2007 3:56 PM

Chris Bourassa
Consultant

Structure Map - System



May not be required

May not be located correctly

Wireframe - Medical Underwriting

System Logo

User Info

Medical Underwriting

Search for M/U Case (Application or Policy Change) 1

Status Options

Modified Options

Search Value 1

Search Field 1

Search Value 2

Search Field 2

List of Matching M/U Cases 2

Client	Case Type	M/U Action Needed

General Application/Policy Data 3

View Complete Application/Policy

M/U Review Data 4

Insured and M/U Data/Decision 5

- Rejected
- Counter-Offer
- Approved with Conditions

Record M/U Decision

Record Counter-Offer Decision

Notes

1. The search fields will focus on finding relevant M/U case records efficiently. These values will immediately affect what is shown in the list area.

   Search Field Options:
   Item Type (App or Policy),
   Entered Date,
   Applicant/Policy Holder Name,
   etc.

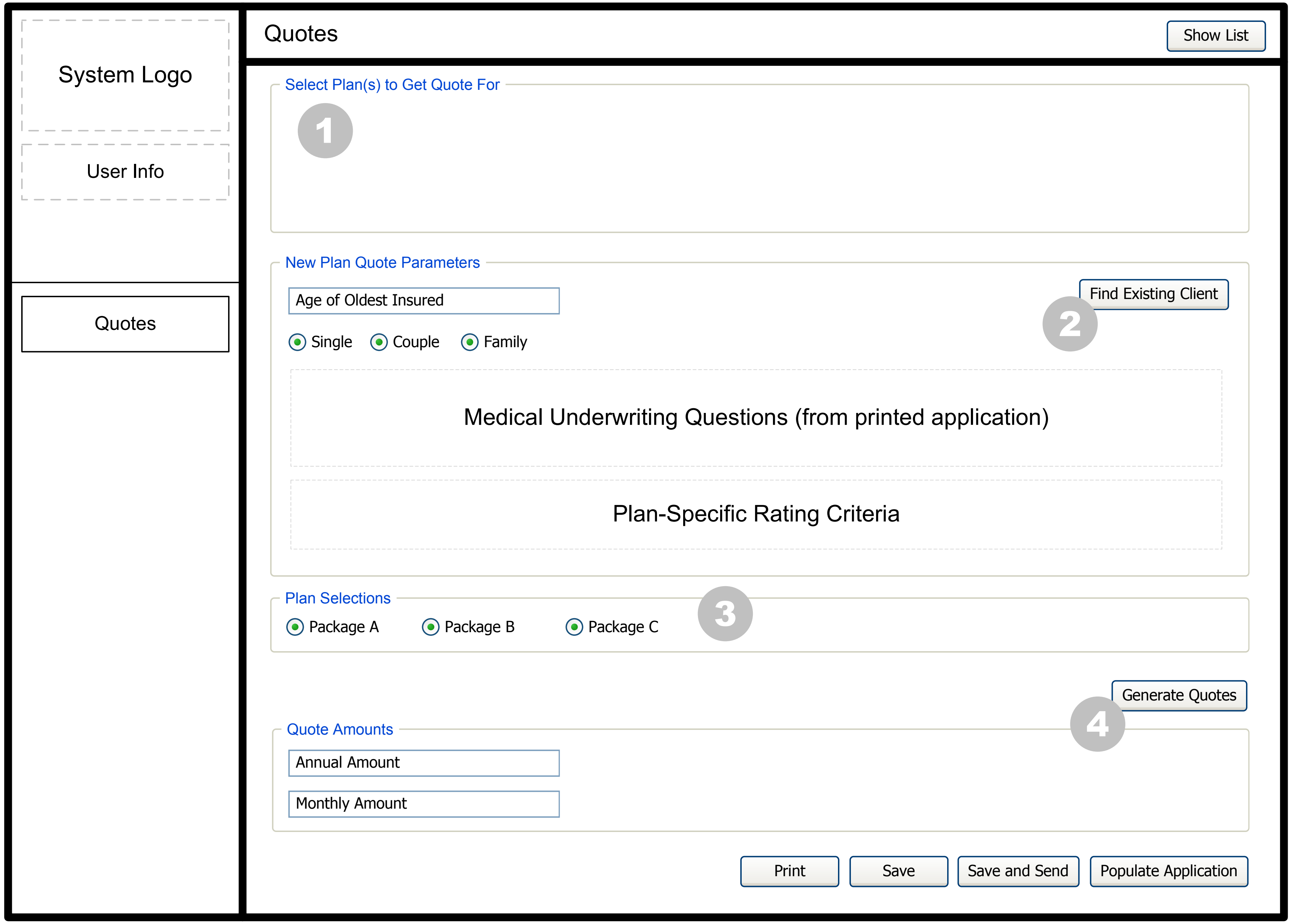
2. The list of M/U cases will be a mixed list of applications and or policies with changes where M/U is needed. Any other types of items needing M/U could also be shown here.

3. General read-only summary information for the application/policy that has been selected in the list. Link to view the complete item (in a new window) should be shown here.

4. Details of what M/U activity is needed for the currently selected item. Read-only fields derived by the system when flagging the item for M/U.

5. Data entry form to record the M/U decision details along with any necessary details for counter-offers and counter-offer acceptance.

Wireframe – Quote Details



Notes

? If the quote is associated with a prospect that has called in the a different path or functionality is needed (Prospect may not be in scope)

1 May be multiple plans allowed to be selected.

2 Existing client data can be located and used to populate portions of the quote form.

3 The general rules for the selected plan will determine the available packages shown.

4 The system will display errors if the combination of plans selected is not available based on the information entered.

Wireframe – Payments Main

System Logo

User Info

Payments

Search for Payment/Payment Batch (1)

Status Options

Modified Options

Search Value 1 | Search Field 1

Search Value 2 | Search Field 2

List of Matching Payments/Payment Batches (2)

Payment Date	Policy Number	Batch ID	Amount	Unallocated Amont

New

Payment/Payment Batch Data (3)

Period | Batch ID | Generate New Batch ID

Policy Number	Amount Due	Payment Amount	Unallocated Amount	Notes

Record NSF | Batch Report

Submit | Cancel

Notes

? Need to identify overpayment/underpayment and generate letters for this somewhere.

1 The search fields will focus on finding relevant payments/payment batches efficiently. These values will immediately affect what is shown in the list area.

Search By Batch ID

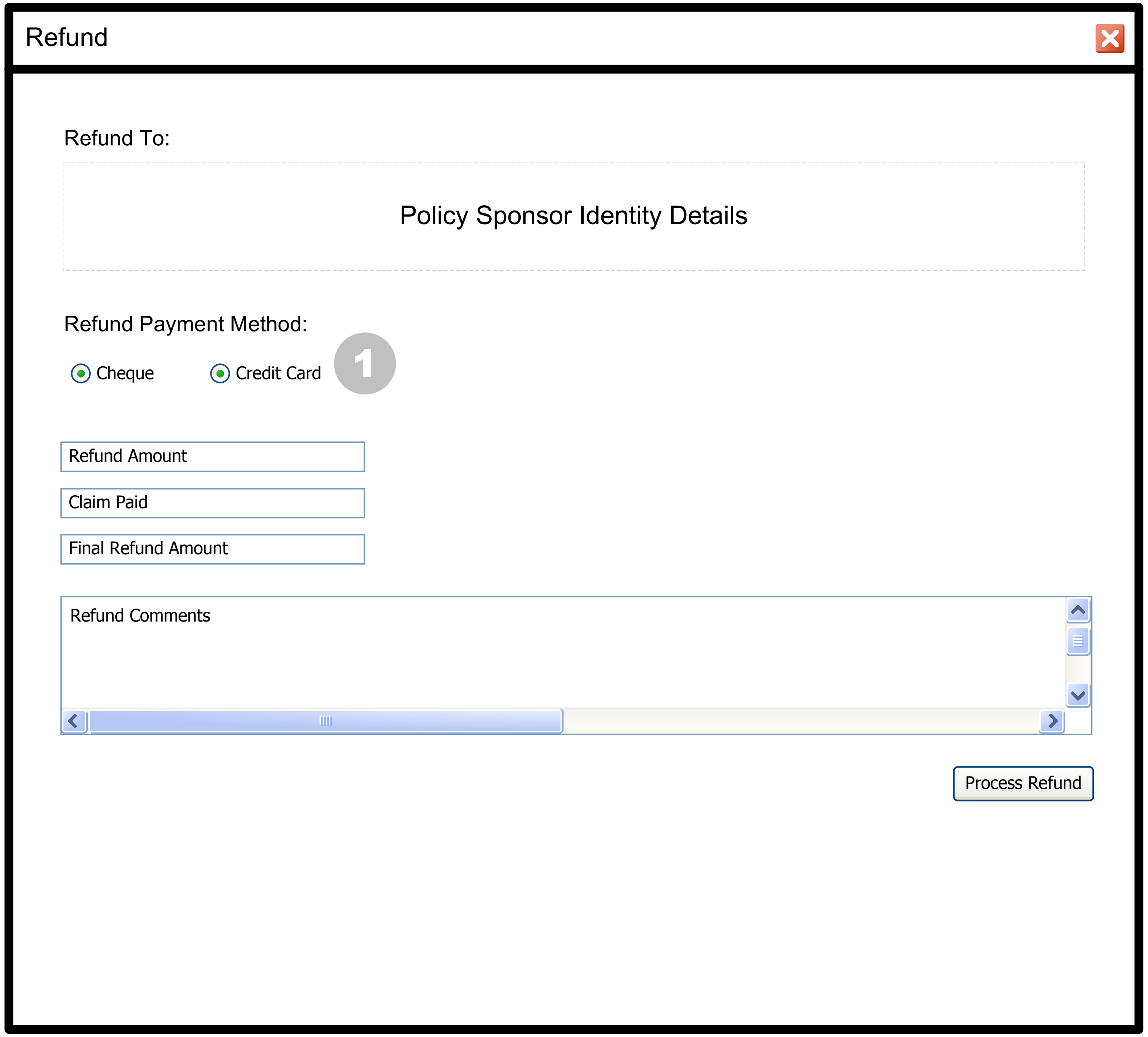
2 The list of payments/payment batches will display enough information to allow for selection of the correct one.

3 Data entry for the payment/payment batch. Multiple payments can be entered at once.

Batch IDs are created by the system.

When the policy is entered the system will lookup the amount due and display it in the Amount Due column.

Wireframe – Dialog - Refund



Notes

This dialog may pop up during several transactions.

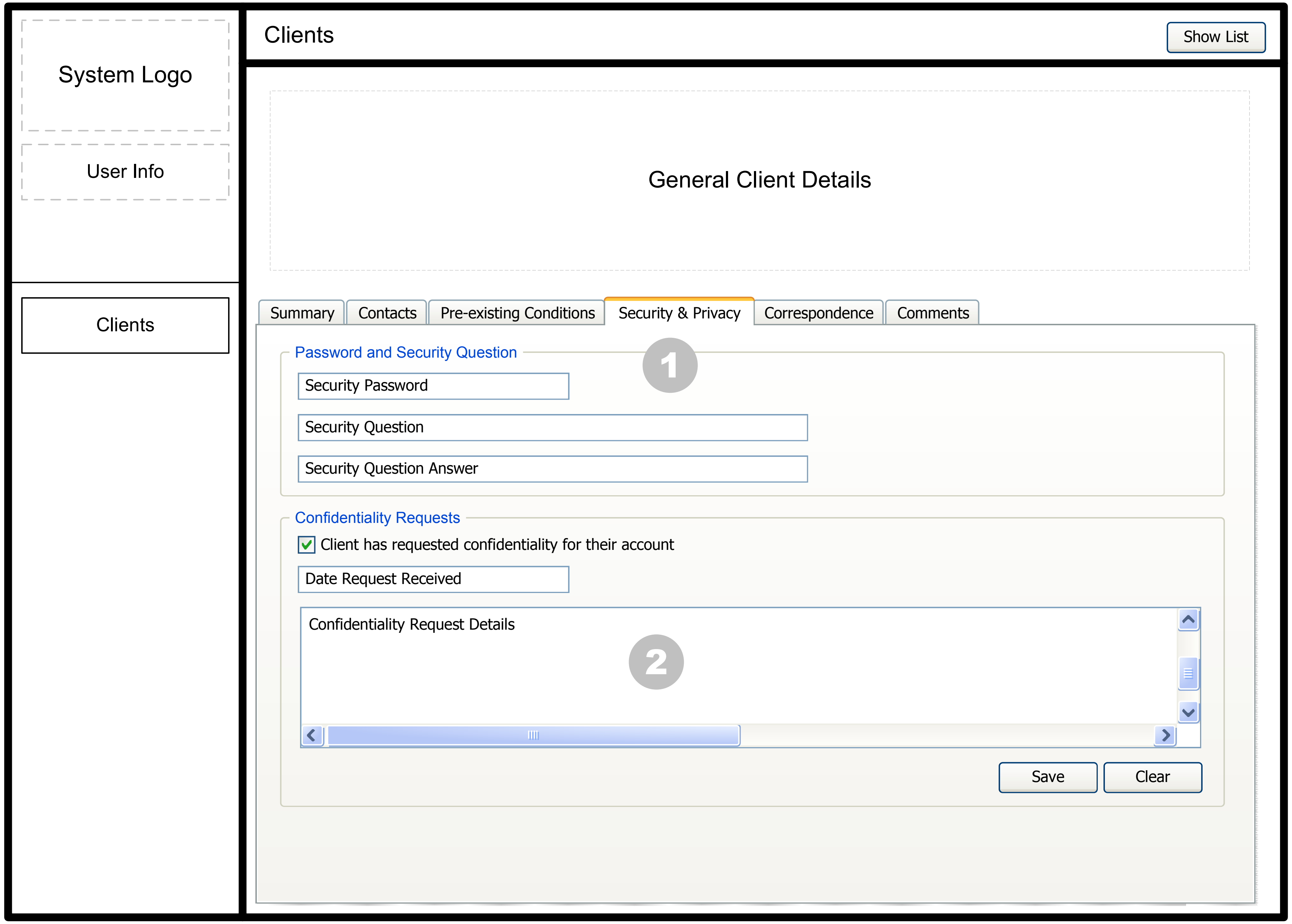
Some transactions will likely trigger calculation of refund.

Will need to initiate independently to:
- Run reports
- Create refunds

May also need a search for refund screen so the cheque number can be tied to the refund generated.

1 Integration to Moneris would be needed for credit card refunds.

Wireframe – Client – Security & Privacy



Notes

1. Read-only data display for the client's security and privacy information.

   The password field should be masked here. If password recovery is needed the password should be reset.

2. If there is a confidentiality request in the system this message should pop-up in a dialog box each time that the client's records are accessed.