Creating a Form Using the Applied/Microsoft® Word® Interface

SESSION HANDOUT

Applied Client Network

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Prepared for Applied Client Network

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Target Audience

	Accountant/Bookkeeper	X	Producer
X	CSR	X	Trainer
	Carrier		Vendor
X	IT Manager/Systems Coordinator		ALL
X	Operations		Other: (describe)
X	Principal/Owner		

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Seminar Type

Microsoft Products

Seminar Level

Advanced: An advanced level course facilitates the development of thoughts (ideas, theories, procedures) to the most advanced stage possible. For functional courses, the objectives taught at this level challenge learners to analyze and make business decisions on how to utilize the agency management system or software in their agency, or apply a high level of technical aptitude to understand in depth features and functionality.

Class Description

You will learn in both Epic and TAM how to create a form such as a company-specific application or a performance bond which prefills with the client's information from your database.

Learning Outcomes

1. You will have two methods of creating a form that looks just like the non-TAM/Epic document, and the pros and cons of each method
2. You will be able to get a carrier-specific application (such as EPLI or D&O) to print from within your system with the client data pre-filled
3. You will be able to generate a township's performance bond, or the state surplus lines affidavit, without going to the typewriter

Assumptions

This seminar is based on the following
TAM Version 2012/2015
Epic Version 2013/2015
Microsoft ® Word Version 2010

Introduction

If your agency is like many agencies, even though you may use your TAM or Epic system for formletters and proposals, there are still forms that are completed manually (e.g., bond forms, special certificates). Besides having to be done "one by one", this manual completion of forms creates an issue of how to attach them to the customer. You can utilize the Applied/Word interface to create these forms so that they pull information stored in the database as well as automatically attach to the customer.

In today's industry, insurance companies and municipalities often provide copies of these special forms via an internet website or the underwriter provides the form via e-mail.

There are two ways to create forms in TAM and Epic. You can import an image of the form and use it as a "background" with the Applied data fields overlaid on the image or you can recreate the form directly in Word and incorporate the data fields into the form.

Why do we demonstrate two methods? Because each has advantages. Using an image file is quicker and easier – you do not have to spend a lot of time replicating the look of the form in Word, which can involve choosing a font and adjusting font sizes, and creating tables that allow you to place the information in the right places on the form. However, the disadvantage of this method is that the data and the form are basically independent of each other – if the data on a particular client takes up an extra line, everything else on the page will be pushed down and it won't line up with the text in the image. This can't happen when you build the form in Word.

The example we will use in this tool is the New Jersey Surplus Lines Affidavit. This is a form that must be completed by the agent on every surplus lines policy written on a risk located in New Jersey. This particular form is specific to New Jersey; however, most states have a requirement that a similar form be completed on surplus lines risks, so it is used frequently in agencies. Speeding up the completion of the form will improve efficiency in the agency.

The form is shown on the next two pages.

Form Number **SLPS-6-CERT-1** /__/__/__/__/__/__/ - /__/__/ - /__/__/__/__/__/__/
Transaction Number

STATE OF NEW JERSEY
DEPARTMENT OF BANKING AND INSURANCE
SURPLUS LINES EXAMINING OFFICE
P.O. BOX 325
TRENTON, NEW JERSEY 08625-0325

CERTIFICATION OF EFFORT TO PLACE RISK WITH AUTHORIZED INSURER

This certification shall be submitted by the originating producer to the surplus lines agent, within 30 business days after the effectuation of any surplus lines insurance. The **original** of the certification must be maintained in the files of the surplus lines agent and a copy in the files of the producer and both must be available for inspection by the Commissioner for a period of at least five years.

(Name of Insured)

(Address of Insured)

(Location of Property or Risk)

(Insurance Coverage: Description and Amount)

//

(Originating Producer – Corporate or partnership)

(Originating Producer – Individual name and/or Title)

(Originating Producer – Complete Address)

The above hereby certifies that he/she is duly licensed as an insurance producer under the laws of New Jersey, and that: On or about _________________________, 20__, I was engaged by the insured named herein to procure insurance of the kind described herein and in the amount shown. I have made a diligent effort first to place this coverage with authorized insurers, each of which is authorized in New Jersey to write insurance of the kind requested and is an insurer that I had a good faith reason to believe might consider writing the type of coverage described herein.

Certification of Effort To Place Risk With Authorized Insurer (continued)

The following insurers are among those that I contacted relative to this risk, or to substantially similar risks within the past 30 days:

INSURER	REPRESENTATIVE	TELEPHONE NO.	DATE	RESULTS CODE*

*Result Codes: (enter appropriate code(s) for each insurer listed above)

A. – Having made a diligent effort. I was unable to obtain an offer/quote from this authorized insurer in the admitted market, which declined to accept all or any part of the risk.

AND/OR

B. -- Having made a diligent effort, the only offer (s)/ quote(s) obtained reflected such a substantial increase in premium over similar coverage placed within the preceding 12 months that comparable coverage is, as a practical matter, unavailable from this authorized insurer in the admitted market.

AND / OR

C. -- Having made a diligent effort. , the only offer (s)/ quote(s) obtained reflect(s) such a substantial reduction in coverage from coverage placed within the preceding 12 months for substantially similar premium that comparable coverage is, as a practical matter, unavailable from this authorized insurer in the admitted market.

I certify that the foregoing statements made by me are true to the best of my knowledge and belief. I am aware that if any of the statements are willfully false, I am subject to civil and criminal penalties.

__________________ ______________________________________

(Date) **(Signature)**

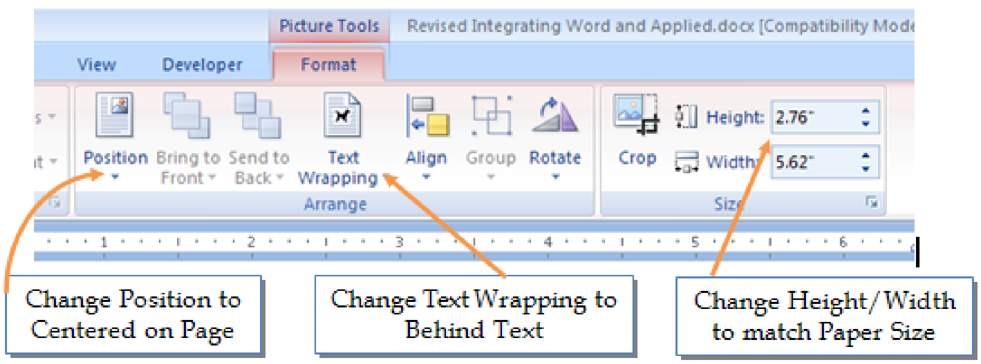
Amended by R.2005 d.104, effective April 4, 2005.
See: 36 N.J.R.2144(a), 37 N.J.R.1065(a).

Creating a Form Using an Image

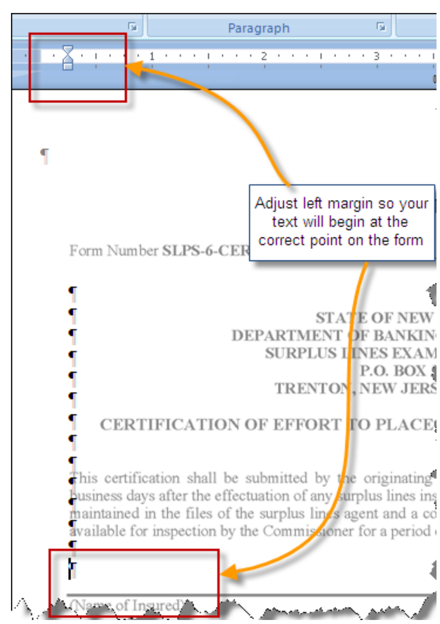
Each page of the blank form needs to be saved as an individual image file.

Here are the steps for creating a form.

- In TAM, access Document Setup through Utilities.
  In Epic, access Attachments, Templates through Configure.
- Create a new formletter (TAM) or template (Epic) by completing the document setup information as necessary.
- Once Word is open, from the Insert tab on the ribbon, select Header, Edit Header. With the Header open, from the Insert tab on the ribbon, select Picture, From File. Browse to the location where you stored the form image file, select it, and click Insert.



- On the Picture Tools Format tab on the ribbon, make the changes shown above. Depending on the height to width ratio of your particular image, you need to decide which dimension takes precedence – don't exceed the paper size with either dimension.
- Close the header by clicking anywhere in the main body of the document.
- Adjust the left margin to coincide with the point where you will want data to begin on the form.



- You can now type "on top" of the image - inserting data fields, ASK variables, etc as needed.

As you enter the data fields, you will sometimes find that they wrap onto the next line, even though the actual data at the client level will not. When this happens, you have to put subsequent data fields one line below where you want them to appear on the image. Also remember that this effect is cumulative – every time data fields wrap to the next line you have to drop the following entries by one more line.

Hint: You can check to see if you have your entries on the correct lines by turning off View Field Codes by pressing Alt-F9 on your keyboard. In most cases, this will reduce the space the data fields take up so that they fit on a single line.

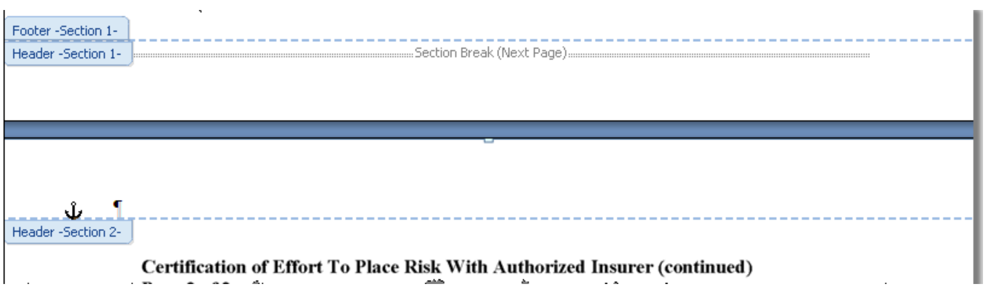
If necessary, you can use Font size and/or Line Spacing to adjust the vertical placement of the text and data fields so that they line up exactly on the lines in the background image.

- To create the next page, you need to insert a section break so you can change the header and insert the second page image.

  On the Page Layout tab on the ribbon, select Breaks, Section Breaks, Next Page.

  On the second page, the first page image is repeated in the header. That's because by default the header is linked to the previous section as shown here.

- On the Header & Footer Tools Design ribbon, unselect the "Link to Previous" box. You can now delete the first page image from this header without its being deleted from the first page, and insert the second page image using the same process described earlier. The image below shows the results.



- Close the Header and Footer.

- You can now complete the entry of the data fields onto the image in the same way as you did for the first page.

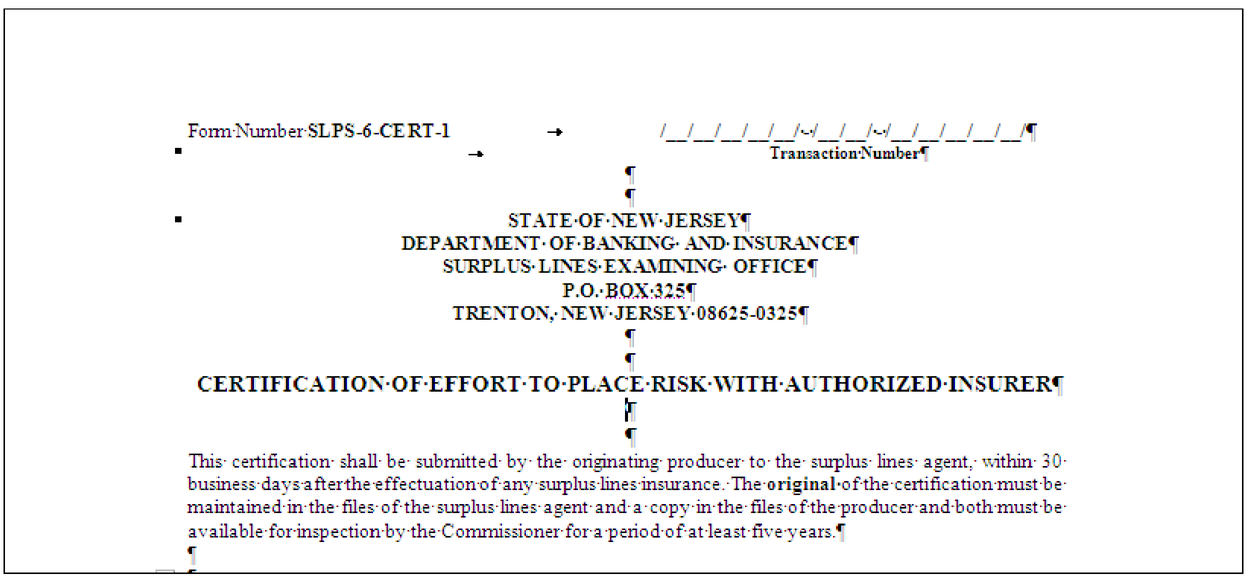
Creating a Form Directly in Word

Another option for creating forms in Word is to build the form manually, not using an image as a background. Some pre-planning is called for regarding the layout and general design process.

Review the form that you are replicating and consider the following points.

- What font should you use?
- Is there a logo you need to create as an image file to insert into the form?
- Will you need to use tables to replicate parts of the form, while other parts will be simple text entries? The benefit of using tables is that you can force a table cell to remain a constant size regardless of the amount of data that is being imported on any particular client.
- Can the form be broken down into logical sections? For example, a certain area has five columns across that should be one table while another area has a series of one column rows that should be another table.
- Once the document setup areas have been completed and the empty document is open in TAM or Epic, set the page width, margins and font to match the original document.

In our example, we will start by entering the top part of the form without a table.


Form Number SLPS-6-CERT-1 /__/__/__/__/__/-/__/__/-/__/__/__/__/__/
Transaction Number

STATE OF NEW JERSEY
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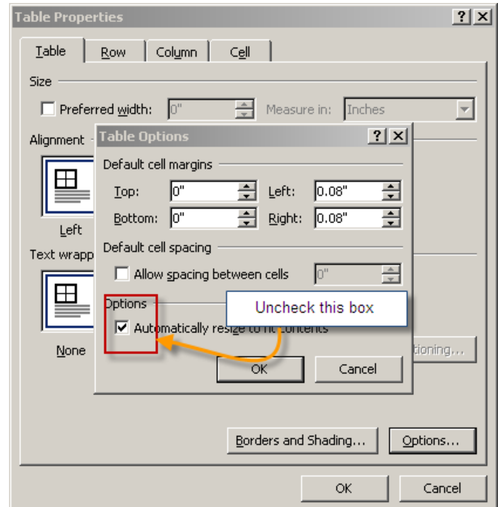
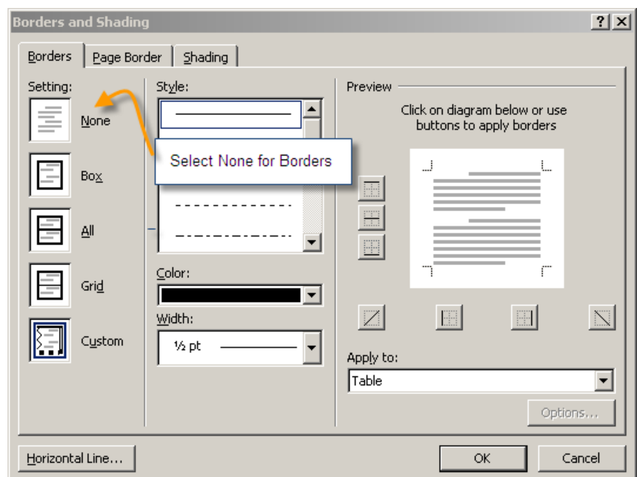
For the next part of the form, we will create a table 8 rows deep and 1 column wide. The first row will be where we put the Client Name data field; the second row will contain the text “(Name of Insured)”. We will create the appearance of the lines by turning on either top or bottom borders for the rows with data fields in them.

- On the Table Tools Layout tab on the ribbon, select Properties then Options. Uncheck the box “Automatically resize to fit contents”. This will allow you to control the column widths without Word changing them when you put data fields in them.



- Next, go to Borders and Shading and turn off all of the Borders (after entering the text you will come back in here on selected cells and turn on the Top Border)



- Enter the text in the appropriate rows and turn on the Top Borders in those rows as described above. Your table should now look like this:

(Name of Insured)
(Address of Insured)
(Location of Property or Risk)
(Insurance Coverage: Description & Amount)

- Next, put the data fields in the rows above their captions. You will see that we are using ASK variables to gather some information that isn't available in the database.

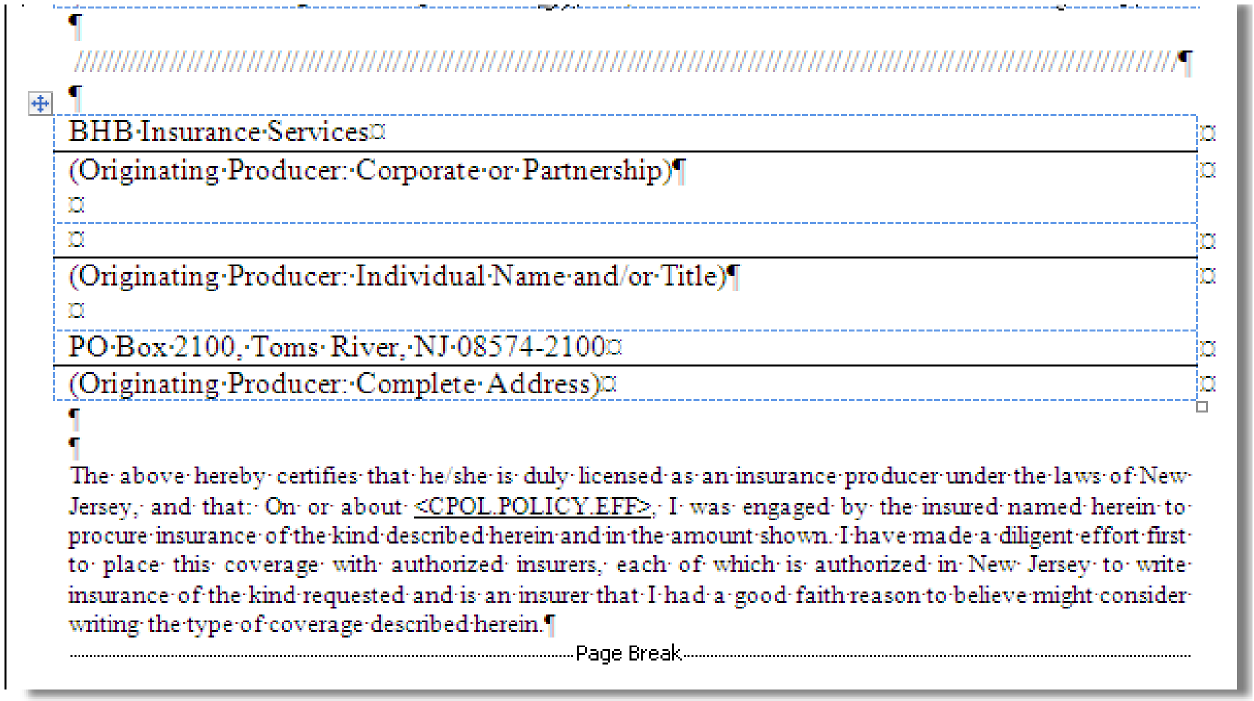
In TAM it looks like this:

```
<CUST.INS.NAME><CUST.INS.ATTN>
(Name of Insured)

<CUST.INS.STREET>, <CUST.INS.CITY><CUST.INS.ST><CUST.INS.ZIP>
(Address of Insured)

{ Ask LOCATION "What is location of property or risk?" \d " " }{ Ref LOCATION }
(Location of Property or Risk)

{ Ask COVERAGE "What is description and amount of coverage?" \d " " }{ Ref COVERAGE }
```

And in Epic it looks like this:

```
maintained in the files of the surplus lines agent and a copy in the files of the producer and both must be available for inspection by the Commissioner for a period of five years.

{ DOCVARIABLE MasterAccountMerge.Account.Common.Common.AcctName*0*1 }
(Name of Insured)
{ DOCVARIABLE MasterAccountMerge.Account.Common.Address.Address1*0*2 }, { DOCVARIABLE MasterAccountMerge.Account.Common.Address.City*0*3 }, { DOCVARIABLE MasterAccountMerge.Account.Common.Address.StateCode*0*5 } { DOCVARIABLE MasterAccountMerge.Account.Common.Address.PostalCode*12*4 }
(Address of Insured)
{ ASK LOCATION "What is the location of the risk? Enter in the format shown." \d "123 Main Street, City, NJ 12345" \* MERGEFORMAT }{ REF LOCATION }
(Location of Property or Risk)
{ ASK COVERAGE "What is the description of coverage? Enter in the format shown." \d "Fire & Allied Perils, $100,000" \* MERGEFORMAT }{ REF COVERAGE }
(Insurance Coverage – Description and Amount)
```

Continue creating the form using either text or tables as you deem appropriate. Here is the screen shot of the rest of the first page.



BHB Insurance Services
(Originating Producer: Corporate or Partnership)
(Originating Producer: Individual Name and/or Title)
PO Box 2100, Toms River, NJ 08574-2100
(Originating Producer: Complete Address)

The above hereby certifies that he/she is duly licensed as an insurance producer under the laws of New Jersey, and that: On or about <CPOL.POLICY.EFF>, I was engaged by the insured named herein to procure insurance of the kind described herein and in the amount shown. I have made a diligent effort first to place this coverage with authorized insurers, each of which is authorized in New Jersey to write insurance of the kind requested and is an insurer that I had a good faith reason to believe might consider writing the type of coverage described herein.

Page Break

- Create the second page in the same manner. This is what the top of the page looks like:

Certification of Effort To Place Risk With Authorized Insurer (continued)
<u>Page 2 of 2</u>

The following insurers are among those that I contacted relative to this risk, or to substantially similar risks within the past 30 days:
{ASK reasoncode "What is the reason for S/L placement? Type A, B, or C after reading the list below" \d "A. No admitted coverage available
B. Comparable premium not available
C. Comparable coverage not available" }

INSURER	REPRESENTATIVE	TELEPHONE NO.	DATE	RESULTS CODE *
				{ QUOTE { REF reasoncode } * upper }
				{ QUOTE { REF reasoncode } * upper }
				{ QUOTE { REF reasoncode } * upper }

Notice that in the table that is asking for the names of carriers that declined the risk, there are no data or Word fields entered. Therefore, the CSR would need to enter this info into the table after creating the form at the client level. If you always use the same carriers and underwriters in this table, you could preset them in the table. If you have a set you use for personal lines accounts and another set you use for commercial lines accounts, you could have an IF statement look at the customer code. If it's a personal code, insert one table; if it's a commercial code, insert another table.