



23.5.2 Client Product Release

WHAT'S NEW IN THIS RELEASE

Feature	QL
Update to add Lasers to Proposal Details	✓
New “Stepper” for Proposal Details Import and Verification	✓

OVERVIEW

Version 5.2
<p>Ringmaster is pleased to share new features within Quote-LinQ for the entry of proposal information within a Quote. There are two primary features that we will cover with the product release for May 25, 2023. Below we will provide an overview with details on the functionality and visual changes associated with these new features.</p> <ol style="list-style-type: none"> 1. Ability to add and update member laser information within the proposal details screen. <ol style="list-style-type: none"> a. With the release of this product update, Responders (Carrier/MGU) and Producers will have the ability to add information into the proposal details screen to capture details for member lasers. b. This information will automatically be captured within the proposal details screen when provided to Ringmaster via the ESL integration. c. NOTE: The OCR process will not capture this information when provided at the option level or when contained in the contingencies (PDF narrative). 2. Change in the view and flow for the proposal details screen for input and verification. <ol style="list-style-type: none"> a. You will now have the ability to view the proposal details screen through a stepper within the “Edit” functionality.

Adding Lasers to Proposals within Quote-LinQ

OCR Enabled Proposal Input

The process will flow according to these steps for any Quote-LinQ user that has the ability to import a PDF Proposal Template via the OCR (Optical Character Recognition) process.

1. After a proposal has been accepted (in the Underwriting Stage) you will select the quote and proceed to the “Proposal” Tab within the Quote Queue Workspace. You will notice a slight difference in the look of this screen, but all of the data elements are still available, and will continue to function as previously designed.

Edit

Proposal

General

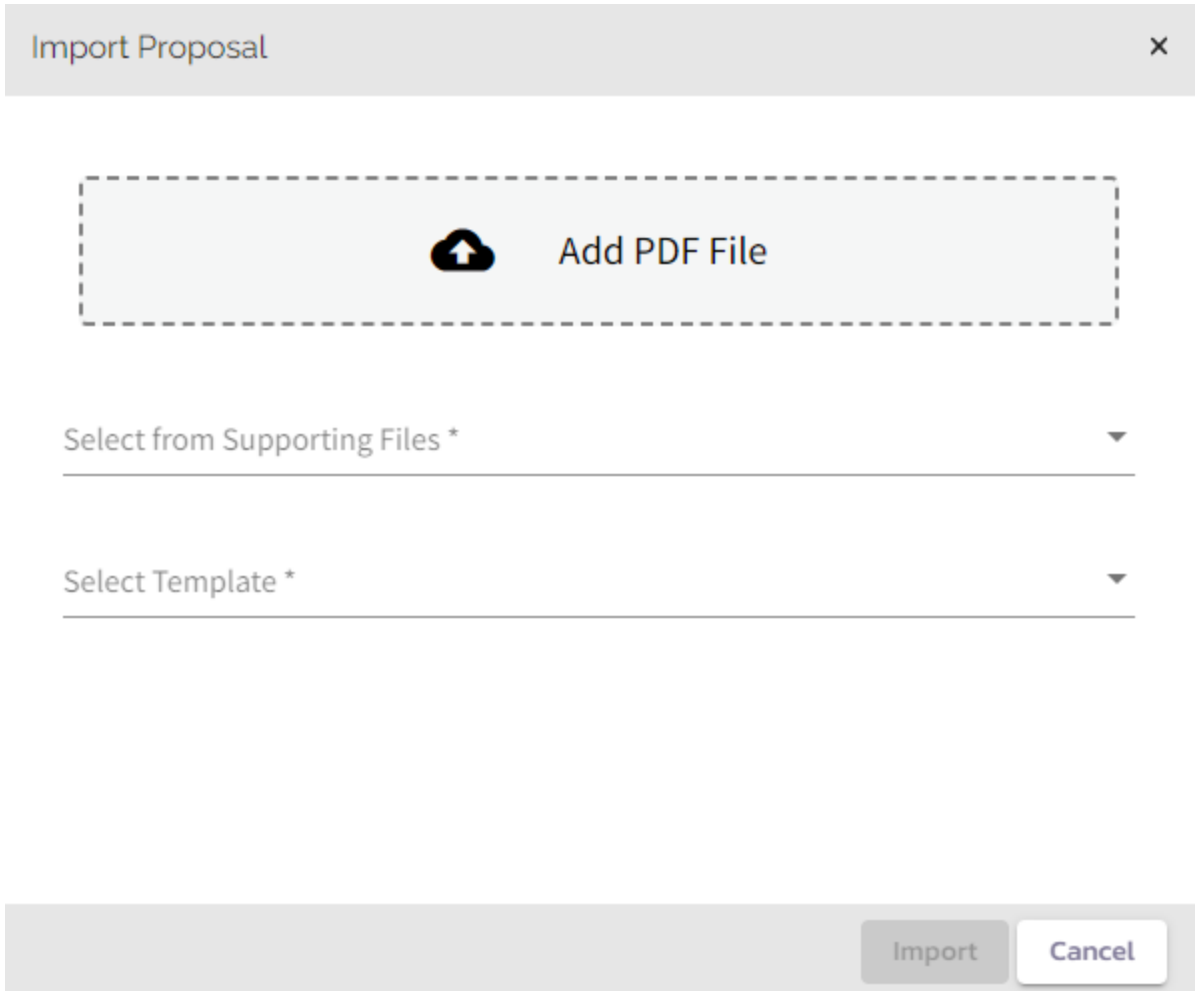
Proposal Status	--
Contract Effective Date	--
Contract Expiration Date	--
Proposal Date	--
Valid Through Date	--
Last Updated Date	05/23/2023

2. Select Edit

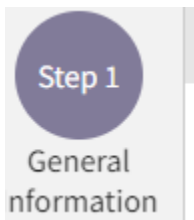
- a. This will activate the stepper and allow you to proceed with Importing the PDF proposal and attaching the quote supporting file.
- b. The view will show the steps on the left panel of the Edit Proposal screen.


The screenshot shows the 'Edit Proposal' interface. At the top, there is a navigation bar with 'Edit Proposal' and a highlighted 'Import Proposal' button. Below this is a large purple header for 'Step 1. Confirm General Information'. The main content area is divided into two sections: 'General Information' and 'Requested Enrollment'. The 'General Information' section contains three input fields: 'Proposal Status *', 'Contract Effective Date' (with a date format 'mm/dd/yyyy'), and 'Contract Expiration Date' (with a date format 'mm/dd/yyyy'). The 'Requested Enrollment' section contains two rows: 'EE Only (Single)' with a value of '200' and 'EE + Spouse' with a value of '200'. On the left side, there is a vertical stepper with four steps: 'Step 1 General Information' (active), 'Step 2 Specific', 'Step 3 Aggregate', and 'Step 4 Lasers'.

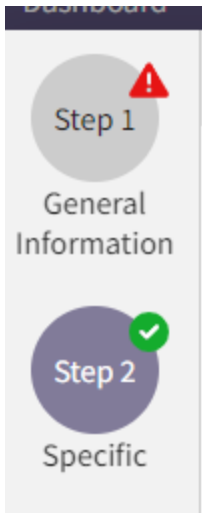
- c. Select Import Proposal at the top of the screen. This will activate the normal process for importing and adding the Proposal details from the PDF into the applicable data fields within Quote-LinQ.



- d. Select the proposal from your supporting documents from the appropriate location, and select the template to start the import process.
3. After the Import Process has completed. You will be prompted with Step 1 - General Information. Which contains the same information as previously captured in the section named the same. Please review to verify that the appropriate data has mapped from the PDF into this screen. After your review and updates are complete, select “Next” to move to Step 2.



- a.  Please note that while you will be allowed to move to the next step when there are elements missing, you will have to update/correct before saving the data. You will see an indicator within that step when there is data required for update.



4. Step 2 will capture information from the proposal related to the **specific** coverage and terms. The process for review is the same as before. You will be triggered when a data element may not have been captured with the highest degree of accuracy for you to review and/or correct.

Field	Value
Coverage	Medical, Prescription
Contract Type	24/12
Spec Deductible	\$110,000.00
Agg Spec Deductible	
Annual Maximum Unlimited	Yes
Annual Maximum Amount	
Lifetime Maximum Unlimited	Yes
Lifetime Maximum Amount	

OCR Result

Medical, Rx

Field: Coverage
Confidence: 99.624855

Expand
Cancel

- a. Will continue to have the ability to expand from this view to review the entire PDF and the value in question will be highlighted for further review.



Medical, Rx

24/12

\$100,000

No

- b. Once you have completed your review and made all of the necessary updates or additions you can select “next” to move forward.
5. Step 3 will capture information from the proposal related to the **aggregate** coverage and terms. The process for review is the same as before. You will be triggered when a data element may not have been captured with the highest degree of accuracy for you to review and/or correct.
 - a. Once you have completed your review and made all of the necessary updates or additions you can select “next” to move forward.
 6. Step 4 will allow you to add Laser information for any member/option that may apply.

Step 4. Confirm Laser Details
+ Add

No Lasers.

- a. Select “Add” to enter information. This will allow data entry of the details related to the laser in the required fields. It will also open up an entry for any/all options that existed within the Spec section entered in Step 2. Note that only one of the options can be selected in the Individual Terms section. Select the appropriate option by enabling the radio button to the left of the option, and entering the applicable information for that option. If there are no lasers applicable, you can move forward by selecting “save”

Individual Name/ID*
Member Info with Name or Blinded ID Information
x

Individual Terms	Option 1	Option 2
<input checked="" type="radio"/> Spec Deductible	\$150,000.00	\$200,000.00
<input type="radio"/> Contract Basis
<input type="radio"/> Max Reimbursement

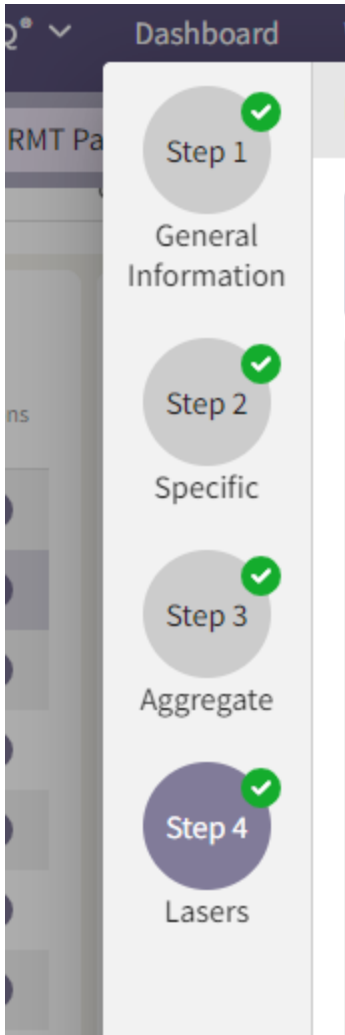
Conditional Laser

Comments

This field can be used to add any additional details that should be reflected and/or to defined the contingencies related to any conditional laser.

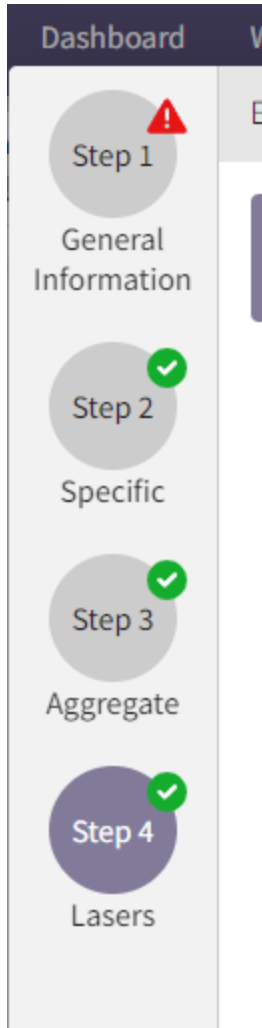
ⓘ At least one individual term is required to save.

7. Once you have cleared all of the necessary information (required fields) within each of the steps, you will see a confirmation with a Green Check by each of the steps. You may then proceed to Save the proposal details as this will only be enabled after each step has been cleared/confirmed. See the image below.



Navigation Options

1. If at any time there are one or more of the steps that you wish to view or update, you can move to that step within the proposal input screen by selecting the step within the side bar. As referenced, you will need to clear all required fields in order to save the proposal information.



2. After the proposal has been saved, you will be able to view all of the information within the “Proposal” selection within the Quote Queue workspace. Any information entered within the Laser step can only be viewed within the Laser step (Step 4 within the Proposal Edit Screen).

Producer View

1. **Information entered with the Laser step can only be viewed within the “Edit Proposal” section of the quote within the Quote Manager. This information will also not automatically carry through to the Compare Options view or the Financial Exhibit.**