

« Insurance » module

The [Insurance] module offers a vision of all insurance portfolios. It allows to have at hand:

- the next payment date with the amounts to be paid
- the total amount of annual premiums
- a record of premiums paid
- a record of claims submitted

Good portfolio management will help to avoid duplication and reduce the costs.

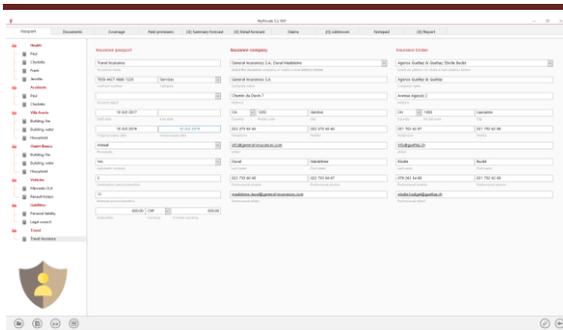
Table of contents

Summary of module tabs	2
[Passport]	2
[Documents] - Summary.....	3
[Documents] - Details.....	3
[Coverage]	3
[Paid premiums] - Summary.....	3
[Paid premiums] - Detail.....	3
[Summary forecast]	4
[Detail Forecast]	4
[Claims] - Summary	4
[Claims] - Detail	4
[Addresses] - Summary	5
[Addresses] - Details.....	5
[Notepad]	5
[Reports].....	6

Summary of module tabs

[Passport]	General information sheet on the insurance policy
[Documents]	Non-financial documents related to respective passports
[Coverage]	Detailed list of objects and risks included / excluded
[Paid premiums]	List of premiums paid
[Summary forecast]	List of future premiums due
[Detail forecast]	Detailed list of upcoming premiums due
[Claims]	Claims List
[Addresses]	Useful addresses
[Notepad]	Notes tab for each policy
[Reports]	Printing of information

[Passport]



The insurance passport allows you to enter for each contract

- Basic information on the insurance
- The address of the insurance company
- The address of a broker

Special fields:

[Category]: This drop-down allows you to specify the risk category covered by the contract: legal liability, long-term disability, major medical bills, premature death, property damage and services.

[Insured person / object]: This drop-down box allows you to link an insurance policy to:

- A family member
- A residence
- A vehicle

Note: these must have been previously created in their respective modules

[Start Date]: The date the contract starts.

[End Date]: The date the contract ends. [Original expiry date]: During the first contract period, expiration date before renewal.

[Actual expiry date]: Next expiry date for all auto renewal contracts. This read-only field is calculated according to the following parameters.

The <due date> minus the <cancellation deadline> appears in the calendar.

[Periodicity]: Payment of premiums

- Annual: 1 payment per year
- Semi-annual: 2 payments per year
- Quarterly: 4 payments per year
- Monthly: 12 payments per year
- Weekly: 52 payments per year

This parameter is used to calculate premium forecasts in the [Summary forecast] and [Detail forecast] tabs.

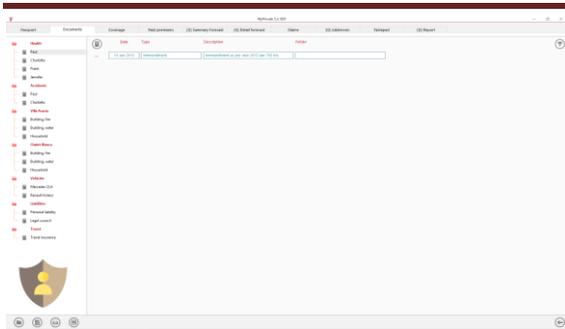
[Automatic renewal]: Indicates if the contract is subject to a tacit renewal.

[Termination Period]: Indicates in months the notice period for termination of the contract. This deadline appears automatically in the event calendar.

[Renewal period]: Indicates in months the duration of the tacit extension of the contract.

[Deductible]: Indicate the amount of excess.

[Documents] - Summary

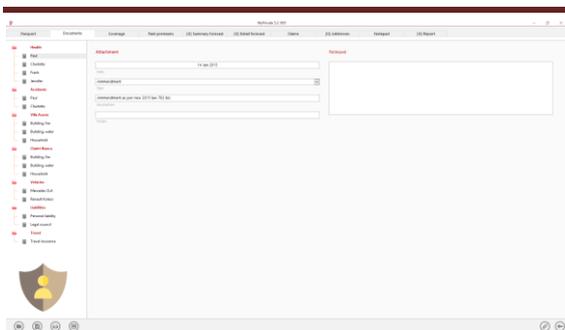


This tab allows you to scan and preserve all types of documents by assigning them a date, a type and a title. A summary of documents related to the object is displayed and allows a quick view of the documents available.



To add a new document, click on the icon
The following screen opens:

[Documents] - Details



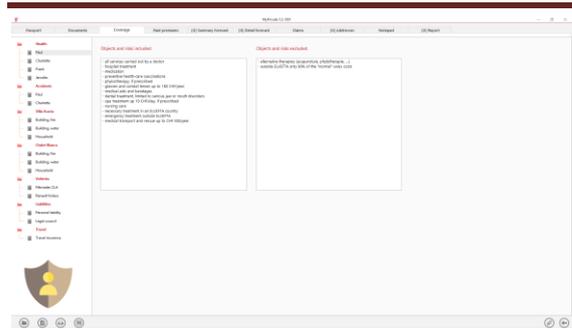
Enter the date of the document, a type (select an existing type from the drop-down menu or enter a new one) and a description. These three items will appear in the [Documents] – Summary tab. The [Notepad] field is for writing additional information.



Once these fields are filled, click on the icon to start scanning documents.

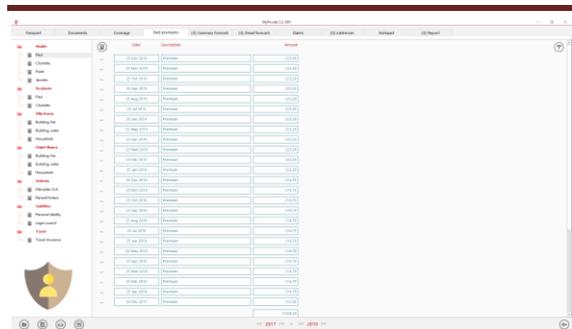
For scanning and document integration, refer to the "Document Management" user manual.

[Coverage]



This tab provides the fields to list the objects and risks covered and excluded from the policy.

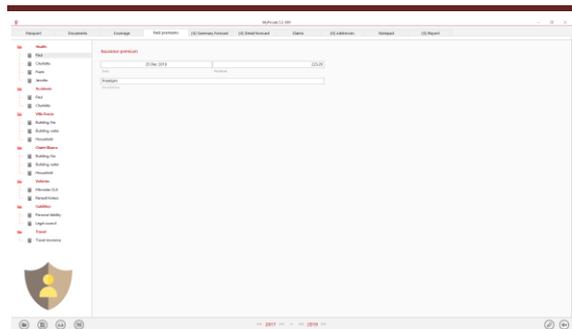
[Paid premiums] - Summary



Displays the list of paid premiums for the selected insurance policy.

To open a payment detail, click [...] to the left of the record.

[Paid premiums] - Detail



Displays the details of each payment. In this window the date and amount can be modified.

[Summary forecast]

Month	Premium	Contracts
Jan 2017	100,000	10
Feb 2017	100,000	10
Mar 2017	100,000	10
Apr 2017	100,000	10
May 2017	100,000	10
Jun 2017	100,000	10
Jul 2017	100,000	10
Aug 2017	100,000	10
Sep 2017	100,000	10
Oct 2017	100,000	10
Nov 2017	100,000	10
Dec 2017	100,000	10
Jan 2018	100,000	10
Feb 2018	100,000	10
Mar 2018	100,000	10
Apr 2018	100,000	10
May 2018	100,000	10
Jun 2018	100,000	10
Jul 2018	100,000	10
Aug 2018	100,000	10
Sep 2018	100,000	10
Oct 2018	100,000	10
Nov 2018	100,000	10
Dec 2018	100,000	10
Jan 2019	100,000	10
Feb 2019	100,000	10
Mar 2019	100,000	10
Apr 2019	100,000	10
May 2019	100,000	10
Jun 2019	100,000	10
Jul 2019	100,000	10
Aug 2019	100,000	10
Sep 2019	100,000	10
Oct 2019	100,000	10
Nov 2019	100,000	10
Dec 2019	100,000	10

This tab displays, for all insurance contracts, the total amount of premiums due per month. By selecting the years at the bottom of the screen, it is possible to display up to a maximum of 36 months.

The [Contracts] column shows the number of contracts covered by the total amount to be paid.

As the calculation is based on the last premium paid, it is not possible to display the impact of future premium increases.

[Detail Forecast]

Month	Premium	Contracts
Jan 2017	100,000	10
Feb 2017	100,000	10
Mar 2017	100,000	10
Apr 2017	100,000	10
May 2017	100,000	10
Jun 2017	100,000	10
Jul 2017	100,000	10
Aug 2017	100,000	10
Sep 2017	100,000	10
Oct 2017	100,000	10
Nov 2017	100,000	10
Dec 2017	100,000	10
Jan 2018	100,000	10
Feb 2018	100,000	10
Mar 2018	100,000	10
Apr 2018	100,000	10
May 2018	100,000	10
Jun 2018	100,000	10
Jul 2018	100,000	10
Aug 2018	100,000	10
Sep 2018	100,000	10
Oct 2018	100,000	10
Nov 2018	100,000	10
Dec 2018	100,000	10
Jan 2019	100,000	10
Feb 2019	100,000	10
Mar 2019	100,000	10
Apr 2019	100,000	10
May 2019	100,000	10
Jun 2019	100,000	10
Jul 2019	100,000	10
Aug 2019	100,000	10
Sep 2019	100,000	10
Oct 2019	100,000	10
Nov 2019	100,000	10
Dec 2019	100,000	10

This tab is similar to the [Summary Forecast] tab, but displays each planned payment and the relevant contract.

[Claims] - Summary

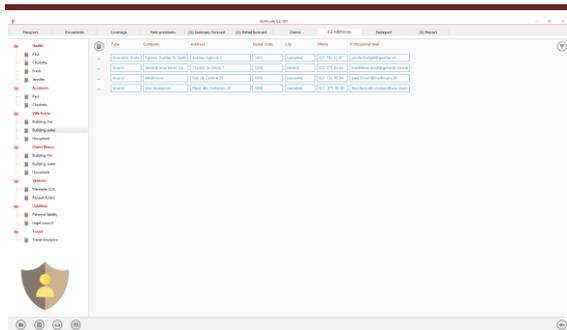
Date	Amount	Status
10/10/2017	1,000,000	Open
11/10/2017	1,000,000	Open
12/10/2017	1,000,000	Open
13/10/2017	1,000,000	Open
14/10/2017	1,000,000	Open
15/10/2017	1,000,000	Open
16/10/2017	1,000,000	Open
17/10/2017	1,000,000	Open
18/10/2017	1,000,000	Open
19/10/2017	1,000,000	Open
20/10/2017	1,000,000	Open
21/10/2017	1,000,000	Open
22/10/2017	1,000,000	Open
23/10/2017	1,000,000	Open
24/10/2017	1,000,000	Open
25/10/2017	1,000,000	Open
26/10/2017	1,000,000	Open
27/10/2017	1,000,000	Open
28/10/2017	1,000,000	Open
29/10/2017	1,000,000	Open
30/10/2017	1,000,000	Open
31/10/2017	1,000,000	Open
01/11/2017	1,000,000	Open
02/11/2017	1,000,000	Open
03/11/2017	1,000,000	Open
04/11/2017	1,000,000	Open
05/11/2017	1,000,000	Open
06/11/2017	1,000,000	Open
07/11/2017	1,000,000	Open
08/11/2017	1,000,000	Open
09/11/2017	1,000,000	Open
10/11/2017	1,000,000	Open
11/11/2017	1,000,000	Open
12/11/2017	1,000,000	Open
13/11/2017	1,000,000	Open
14/11/2017	1,000,000	Open
15/11/2017	1,000,000	Open
16/11/2017	1,000,000	Open
17/11/2017	1,000,000	Open
18/11/2017	1,000,000	Open
19/11/2017	1,000,000	Open
20/11/2017	1,000,000	Open
21/11/2017	1,000,000	Open
22/11/2017	1,000,000	Open
23/11/2017	1,000,000	Open
24/11/2017	1,000,000	Open
25/11/2017	1,000,000	Open
26/11/2017	1,000,000	Open
27/11/2017	1,000,000	Open
28/11/2017	1,000,000	Open
29/11/2017	1,000,000	Open
30/11/2017	1,000,000	Open
01/12/2017	1,000,000	Open
02/12/2017	1,000,000	Open
03/12/2017	1,000,000	Open
04/12/2017	1,000,000	Open
05/12/2017	1,000,000	Open
06/12/2017	1,000,000	Open
07/12/2017	1,000,000	Open
08/12/2017	1,000,000	Open
09/12/2017	1,000,000	Open
10/12/2017	1,000,000	Open
11/12/2017	1,000,000	Open
12/12/2017	1,000,000	Open
13/12/2017	1,000,000	Open
14/12/2017	1,000,000	Open
15/12/2017	1,000,000	Open
16/12/2017	1,000,000	Open
17/12/2017	1,000,000	Open
18/12/2017	1,000,000	Open
19/12/2017	1,000,000	Open
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22/12/2017	1,000,000	Open
23/12/2017	1,000,000	Open
24/12/2017	1,000,000	Open
25/12/2017	1,000,000	Open
26/12/2017	1,000,000	Open
27/12/2017	1,000,000	Open
28/12/2017	1,000,000	Open
29/12/2017	1,000,000	Open
30/12/2017	1,000,000	Open
31/12/2017	1,000,000	Open
01/01/2018	1,000,000	Open
02/01/2018	1,000,000	Open
03/01/2018	1,000,000	Open
04/01/2018	1,000,000	Open
05/01/2018	1,000,000	Open
06/01/2018	1,000,000	Open
07/01/2018	1,000,000	Open
08/01/2018	1,000,000	Open
09/01/2018	1,000,000	Open
10/01/2018	1,000,000	Open
11/01/2018	1,000,000	Open
12/01/2018	1,000,000	Open
13/01/2018	1,000,000	Open
14/01/2018	1,000,000	Open
15/01/2018	1,000,000	Open
16/01/2018	1,000,000	Open
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19/01/2018	1,000,000	Open
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22/01/2018	1,000,000	Open
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27/01/2018	1,000,000	Open
28/01/2018	1,000,000	Open
29/01/2018	1,000,000	Open
30/01/2018	1,000,000	Open
31/01/2018	1,000,000	Open
01/02/2018	1,000,000	Open
02/02/2018	1,000,000	Open
03/02/2018	1,000,000	Open
04/02/2018	1,000,000	Open
05/02/2018	1,000,000	Open
06/02/2018	1,000,000	Open
07/02/2018	1,000,000	Open
08/02/2018	1,000,000	Open
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04/03/2018	1,000,000	Open
05/03/2018	1,000,000	Open
06/03/2018	1,000,000	Open
07/03/2018	1,000,000	Open
08/03/2018	1,000,000	Open
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17/03/2018	1,000,000	Open
18/03/2018	1,000,000	Open
19/03/2018	1,000,000	Open
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21/03/2018	1,000,000	Open
22/03/2018	1,000,000	Open
23/03/2018	1,000,000	Open
24/03/2018	1,000,000	Open
25/03/2018	1,000,000	Open
26/03/2018	1,000,000	Open
27/03/2018	1,000,000	Open
28/03/2018	1,000,000	Open
29/03/2018	1,000,000	Open
30/03/2018	1,000,000	Open
31/03/2018	1,000,000	Open
01/04/2018	1,000,000	Open
02/04/2018	1,000,000	Open
03/04/2018	1,000,000	Open
04/04/2018	1,000,000	Open
05/04/2018	1,000,000	Open
06/04/2018	1,000,000	Open
07/04/2018	1,000,000	Open
08/04/2018	1,000,000	Open
09/04/2018	1,000,000	Open
10/04/2018	1,000,000	Open
11/04/2018	1,000,000	Open
12/04/2018	1,000,000	Open
13/04/2018	1,000,000	Open
14/04/2018	1,000,000	Open
15/04/2018	1,000,000	Open
16/04/2018	1,000,000	Open
17/04/2018	1,000,000	Open

Special fields:

[Bank Account]: This field indicates the account to which the refund will be made. The accounts displayed in this list will have been previously created in the [Bank accounts] module.

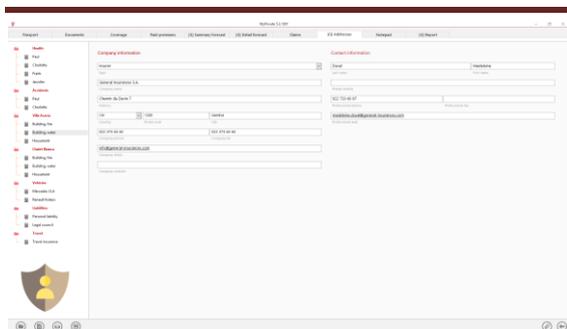
[Amount refunded]: The amount inserted in the field will be automatically visible in the movement of the selected account.

[Addresses] - Summary



This tab displays the summary of the addresses entered in the [Passport] and [Addresses] tabs.

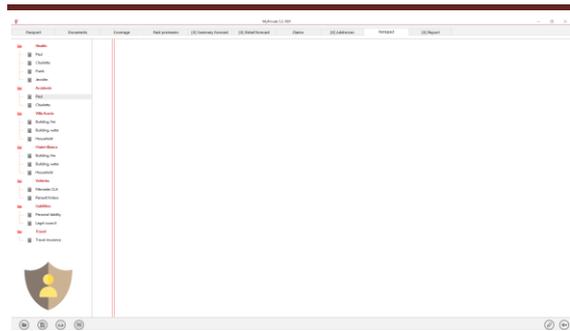
[Addresses] - Details



In this tab the details of addresses related to the insurance policies can be entered.

The addresses on this tab are global. They are available for all the insurance policies.

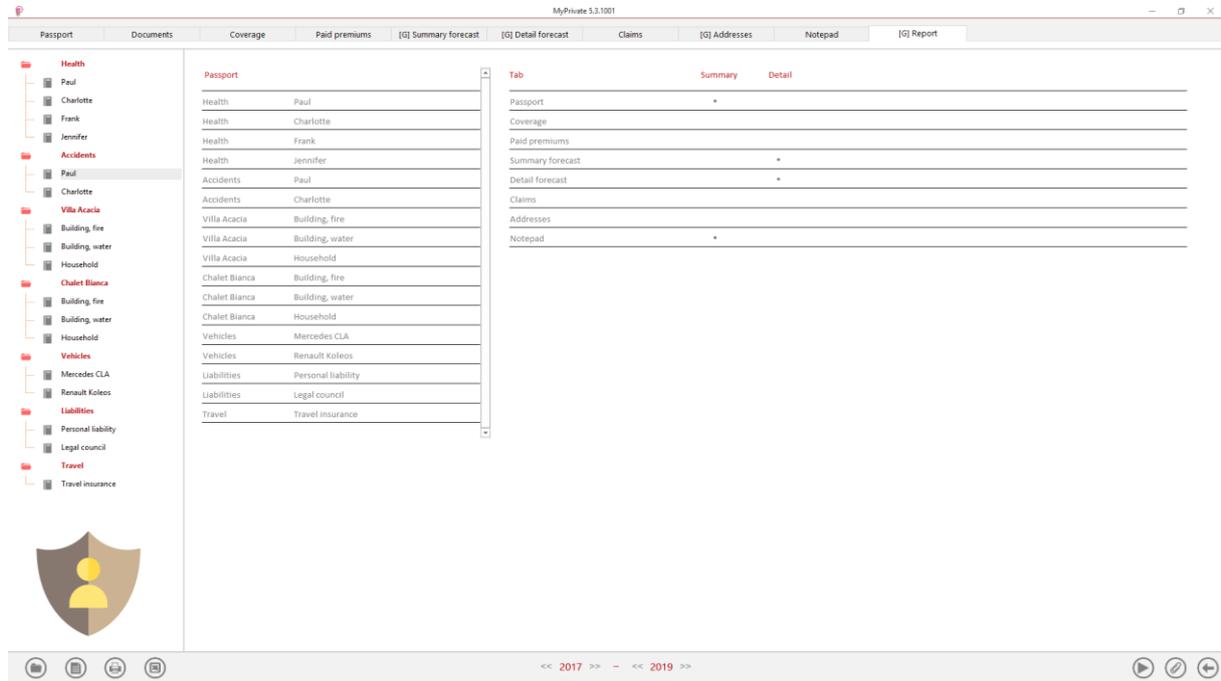
[Notepad]



This tab allows you to enter various notes related to the selected policy.

[Reports]

This tab allows you to choose which passports and tabs to print



Passport	Tab	Summary	Detail
Health Paul	Passport	*	
Health Charlotte	Coverage		
Health Frank	Paid premiums		
Health Jennifer	Summary forecast	*	
Accidents Paul	Detail forecast	*	
Accidents Charlotte	Claims		
Villa Acacia Building, fire	Addresses		
Villa Acacia Building, water	Notepad	*	
Villa Acacia Household			
Chalet Bianca Building, fire			
Chalet Bianca Building, water			
Chalet Bianca Household			
Vehicles Mercedes CLA			
Vehicles Renault Koleos			
Liabilities Personal liability			
Liabilities Legal council			
Travel Travel insurance			

Select/deselect the data to be printed by clicking on the corresponding row(s) and column(s).

The choices are

- Passports
- Tabs - Summary and details

The selected passports and tabs are marked with the character [✓].

For some tabs it is possible to print the summary and/or the details.

If a print option is not available, it is indicated by the [▪] sign.

Once the information to be printed has been chosen, click on the  button then choose the [Generate Report] option.

MyPrivate prepares a PDF file that will be ready for printing.