

Oracle Insurance QuickView Service Ordering User Guide

Version 8.0

February 2009

Oracle Insurance QuickView Service Ordering User Guide

Version 8.0

Part # E14966-01 Library # E14885-01 E14886-01

February 2009

Copyright © 2009, Oracle. All rights reserved.

Contributing Authors: Sameer Managoli, Mark Patterson, Mary Elizabeth Wiger.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, and PeopleSoft are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

INTRODUCTION	4
Audience.....	4
Internet Explorer Settings	4
Clearing Temporary Files	5
Inactivity / Timeout	5
Basic Safety Precautions	5
Notational Conventions	5
Additional Information.....	6
Manual History	6
CHAPTER 1	7
INTRODUCTION TO QUICKVIEW.....	7
Logging into QuickView.....	7
QuickView Service Ordering Functionality	8
QuickView Features and Requirements.....	9
CHAPTER 2	10
NEW ORDERS	10
Adding New Orders	10
Carrier / Applicant Information.....	11
Case Information	11
Requirements	11
Additional Information Popups	12
Additional Options	14
Submit Order	14
CHAPTER 3	16
SERVICE ORDERS TAB	16
Updates	16
Introduction to Summary	17
Order Summary	18
Order Status	20
Order Details	22
Order History	22
Orders.....	23
CHAPTER 4	24
SEARCHING.....	24
Quick Search	24
Detailed Search	25
SUPPORT	27
INDEX.....	28

Introduction

Welcome to the Oracle Insurance QuickView Service Ordering User Guide. With Oracle Insurance QuickView Service Ordering (QuickView), the Writing Agent will be able to:

- Create a Service Order
- View Status of a Service Order
- Search for a Service Order

QuickView is a processing portal that allows agents and agencies to view their pending case status and commissions from the multiple Life Brokerage Insurance Carriers on one web site.

This guide will discuss the following topics and get you started using QuickView Service Ordering.

- Configuring your browser for use with QuickView Service Ordering.
- Logging into QuickView Service Ordering and the Home Page.
- Adding orders to the system.
- Checking the status of your orders.
- Viewing the orders that have had recent activity by Service Providers.
- Searching for orders using either the Quick Search or Detailed Search tools.

Audience

This guide is intended for QuickView Users who want to quickly view their orders.

Internet Explorer Settings

QuickView is a web application that requires certain permissions and controls in order to properly interact with an end user's desktop and file system.

NOTE

If you have a popup blocker installed, you may need to disable it for QuickView to work properly. You also can enable popups for this site.

Browser Configuration

It is recommended that you navigate through QuickView using the application commands found on the left hand side of the screen or at the top of the application screen. Using the Back or Forward buttons on your internet browser bar may result in errors and lost information. You may want to temporarily remove the Standard Buttons from your browser while using QuickView.

Removing Standard Buttons

To temporarily remove the Standard Buttons on Internet Explorer:

- Click **View**➤**Toolbars**➤**Standard Buttons**. The standard button toolbar will be removed.

OR

- Depress the **Alt** key and then **V+T+S**.

Repeat either procedure to restore the *Standard Buttons*.

NOTICE: *This step is entirely optional. If you do not configure your browser in this way, be sure to avoid using the forward and back buttons while navigating through QuickView.*

Clearing Temporary Files

Because QuickView is web-based, you may need to clear out your browser's temporary file periodically.

Keeping the temporary file clear may improve performance by clearing off space from your hard drive.

Inactivity / Timeout

QuickView, a web-based application, will log you out if you are inactive for a length of time. The default setting is **5 minutes** but you can adjust that as needed. If timeout does occur, log back onto the system and continue working.

Basic Safety Precautions

It is recommended that you secure your computer when you need to step away. This prevents any unintentional deletions or entries and protects the integrity of your work.

Notational Conventions

This section explains the conventions used in this guide:

- Menu selections are shown with arrows. For example, the command to select the **Print** choice from the **File** menu looks as follows:

Select **File** > **Print**

- Screen options and selections are shown in **bold**.
- New or emphasized terms are shown in *italics*.

Additional Information

For more information, please go to the Oracle Insurance web site at <http://www.oracle.com/industries/insurance/index.html> or call 888-486-4683.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1 st Edition	P01-303-01	V 1.0	February 2007	Initial Creation
2 nd Edition	P01-303-02	V 1.0	February 2008	Update
3 rd Edition	P01-303-03	V 1.0	February 2009	Update

Introduction to QuickView

Logging into QuickView

Accessing QuickView can be done in a few ways. QuickView may be presented as an option from your company's portal page or you may be given an internet address to connect to. If you receive a QuickView Service Ordering account you will be given:

Internet Address (or URL).

UserID and a password. *Be sure to write down this information and keep it in a safe place.*

To enter the QuickView Service Ordering application:

Enter the URL you were given into your Internet browser. You will be placed on a login screen.

Enter in your UserID and Password.

Press **Enter** to log in. You will be on the Home Page.

The screenshot shows the Oracle QuickView Home Page. The browser title is "[Oracle QuickView] - Home Page - Windows Internet Explorer". The address bar shows "https://demo1.itdx.com/qv/MODULE_HOME.do?ONAPPINIT=Y&MODULE=qv". The page header includes the Oracle logo and "QuickView | Home Page". A search bar is located at the top right with the text "Search: Policy (by Policy No)".

The main content area is divided into several sections:

- Pending Policies:**
 - Summary
 - Policy Search
 - Policies with Follow-ups
- Commission Statements:**
 - Summary
 - Commission Search
 - Commissions with Follow-ups
- Service Orders:** (This section is circled in red in the image)
 - New Order
 - Updates
 - Summary
 - Order Search
- Carrier Set-Up:**
 - Request New Carrier
 - Add to Existing Carrier
- My Profile**

The central content area features a "What's New in Data Movement?" section with a "Two Way Communication" sub-section and a "Click Here for More Information" link. Below this is a "Now Available CE Credits" section with a "Skywire Software is now offering CE credits online" link. To the right, there is a "New Data Movement Partners" section listing Fidelity Life Association, Old Mutual Financial Network (F&G), Prudential, Mutual of Omaha, MetLife of Connecticut, Lincoln Benefit Life, and Genworth. Below this is a "Coming soon!" section listing AIG Commissions, Principal Commissions, Old Mutual Financial Pending, and MetLife Commissions.

The footer of the page includes "Writing Agent User: test test" and "Copyright © 2008, Oracle. All rights reserved." The browser status bar shows "Internet" and "100%".

The options this guide will focus on are located on the left hand side of the screen under Service Orders. From the Home Page, you can create a new order, view orders, or search orders.

NOTE

If you attempt to log in with the wrong password four times in a row, your account will be locked and you will receive the following message:

"Your account has been locked. Please call the Oracle Insurance QV Help Desk at 1-888-486-4683 to un-lock your account!"

QuickView Service Ordering Functionality

This section describes navigating and entered items in QuickView Service Ordering.

Drill Down

To drill down into an order and see more details, click on the underlined text. This may not be displayed on some screens.

Sorting

Lists can be sorted from Descending to Ascending or Ascending to Descending order by clicking the column heading.

Changing Update Notification Criterion

When you select the **Update** screen, you will be notified of orders that have been updated since you last logged in. If you want to change the criterion for what is displayed in the update screen, go to the **Tools>Preferences>Service Order Settings** screen using the link at the top of the window.

NOTE

You can change various account settings in the Preferences screen.

Service Order Settings

To change your criterion for order update notification, go to the **Tools>Preferences** screen:

- Click **Service Order Settings**.
- Scroll down to the **Display Order with Updates** dropdown menu and select the option you want.

If you select **Within last 24 hours** as a setting for service order notifications, the next time you log in or access the Update screen, you will see all the orders that have been updated within the last 24 hours.

QuickView Features and Requirements

The following describes some of the features and requirements of QuickView.

Conditionally Required Fields

Fields that are not marked with asterisks may be *conditionally required*. For example, normally a Drivers License is not required, but when you specify **Prepare Motor Vehicle Report** a Drivers License Number will be required. If you have not entered the required information, a reminder popup message will be displayed.

Highlighted Fields

If you have not completed the required fields and try to advance to the next screen, a popup message will be displayed listing the fields that are required. When you close the popup, the fields that need to be completed before you can advance to the next step will be highlighted.

Drop Down List Boxes

You can save time by selecting options from a drop down menu without using the mouse. Tab to the field and press the first letter of option you want. This will allow you to use the mouse when you need to look at the menu.

NOTE

When the input is on a field with a drop down menu, you can use the up and down arrows until you see the option you need.

City/State/ZIP

City and State information can be entered manually. You also can enter the ZIP Code first and click **Set City/State for the ZIP Code**. This will pull in the corresponding City and State.

Popup Screens

In QuickView, all popup screens work the same and have the same three buttons. Each popup screen will have the following buttons:

- **Reset** – Clicking **Reset** will remove information previously entered and allow you to start again.
- **Close** – Click **Close** when you want to close the popup screen without saving any information.
- **Save** – **Save** will save the information entered on the popup.

New Orders

The New Order screen has three sections: *Carrier, Case, Requirements*. Clicking the section name on the left hand side of the *New Order* screen will take you to that section.

Adding New Orders

- To create a new Service Order, click the **Service Order Tab**.
- Click **New Order**.

After you click New Order, the New Order screen will be displayed.

- Complete all required fields – All required fields are marked with an asterisk.
- Click **Submit Order**.

If necessary, you can click **Reset This Section** to clear out all information previously entered and allow you to start over.

The screenshot displays the Oracle QuickView New Order screen in a Windows Internet Explorer browser window. The address bar shows the URL: `https://demo1.itbdx.com/qv/QV_ORDER_DETAILS.do?ACTIONCODE=NEWORDER&NOCACHE=Y&NEWWIN=Y`. The page is divided into three main sections, each with a corresponding tab on the left sidebar:

- Carrier / Applicant:** This section includes fields for Carrier (dropdown), Applicant Info (First Name, M.I., Last Name), DOB (MM/DD/YYYY), Gender (dropdown), SSN, Driver License No (MVR), and State Issued (MVR) (dropdown). It also features expandable sections for Addresses, Phones, and Emails, each with a "CLICK HERE TO ADD A NEW" link. A "Reset This Section" button and a "SUBMIT ORDER" button are located at the bottom of this section.
- Case Info:** This section includes fields for Case Plan (dropdown), Face Amount (numeric), Policy No., Application Jurisdiction (dropdown), and Agent (dropdown). It also features a "Reset This Section" button and a "SUBMIT ORDER" button.
- Requirements:** This section includes a dropdown for "EXAM Services" (with "Let examination company select Exam Services" selected), a "Requested Exam Date/Time" field, and a "Scheduled Time" dropdown. It also features a "Reset This Section" button and a "SUBMIT ORDER" button.

The left sidebar contains three tabs: "Carrier / Applicant", "Case", and "Requirements". Below the tabs are links for "Put On Hold" and "Cancel Editing". The bottom of the browser window shows the "Done" status bar and the "Internet" icon.

Carrier / Applicant Information

The Applicant Information section is where the required information for the applicant is entered and the carrier is selected.

The carrier must be selected first. The Case and Requirements fields will be populated based on the carrier. The Carrier dropdown menu will display the Carriers that have been set up with a Service Provider. If a Carrier has not been set up with a Service Provider their name will not be displayed in the Carrier dropdown menu.

Case Information

The Case Information section is where the required case information is entered. The options available in the case section will depend upon the carrier selected. You will not be able to complete this section until a carrier is selected.

Requirements

The Requirements section is where the required services information is entered.

Exam Services

When you choose **Exam Services** you can request a specific exam date in the space underneath the exam order description. You also can request an exam time from the dropdown menu. If you need to specify a provider for an exam service, you will see a dropdown menu indicator.

Adding Requirements

To add requirements you will need to select the service provider for exam services and choose:

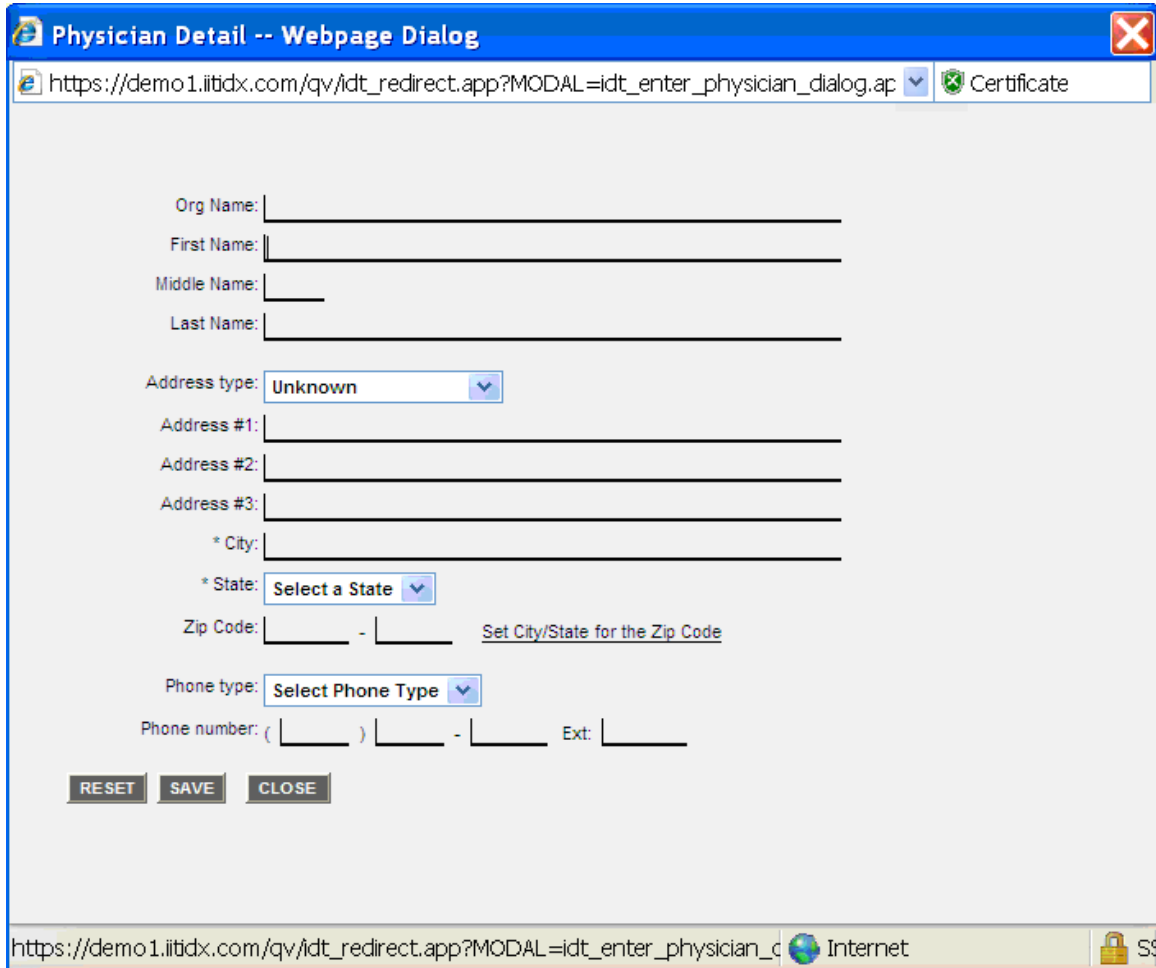
- **Let examination company select the Exam Services** – Use this option when you want the examination company to select the exam services. If you want this option, click the button in front of the option.
- **Let me select Exam Services** – Use this option when you want to select the exam services.

Notes

If you have a special requirement or need to communicate with an exam company, you can add notes in the notes input area on the screen.

Physician Detail Screen

If you opt to **select the Exam Service**, you may need to enter Physician detail. Click the **[Add New Physician]** link and a Physician Detail Screen will be displayed.



The screenshot shows a web browser window titled "Physician Detail -- Webpage Dialog". The address bar displays the URL: https://demo1.iitidx.com/qv/idt_redirect.app?MODAL=idt_enter_physician_dialog.ap. The form contains the following fields and controls:

- Org Name:
- First Name:
- Middle Name:
- Last Name:
- Address type:
- Address #1:
- Address #2:
- Address #3:
- * City:
- * State:
- Zip Code: - [Set City/State for the Zip Code](#)
- Phone type:
- Phone number: () - Ext:

At the bottom of the form are three buttons: **RESET**, **SAVE**, and **CLOSE**. The browser's status bar at the bottom shows the URL, "Internet", and a lock icon.

Enter in the Physician Information and click **Save** to save your entry and return to the order. You can enter additional Physicians if needed. Close will close the popup without saving your information. Reset will clear the fields.

Additional Information Popups

There will be areas where you need to enter in more than one piece of information. For example, you may need to enter a mailing address and a home address. The address, phone, and email screens allow for multiple entries.

Click the add link in the address, phone or email box. A separate popup will be displayed. You must select the type from the drop down window at the top of the popup. Enter in the information and click **Save** to save your entry and return to the order. At least one entry must be the preferred contact method.

Pop-Up Screens – Phone Detail

Phone Detail -- Webpage Dialog

https://demo1.iitidx.com/qv/idt_redirect.app?MODAL=idt_enter_ph Certificate

* Phone type:
Select Phone Type

* Phone number:
() - Ext:

Preferred Phone?

RESET SAVE CLOSE

https://demo1.iitidx.com/qv/idt_redirect.app?MODAL=idt_er Internet

This screen is used to enter Phone Numbers for the Insured.

The Phone Type drop-down allows you to create multiple phone numbers for the same person.

Pop-Up Screens – Email Detail

Email Detail -- Webpage Dialog

https://demo1.iitidx.com/qv/idt_redirect.app?MODAL=idt_enter_err Certificate

* Email type:
Select Email Type

* Email address:

Preferred Email?

RESET SAVE CLOSE

https://demo1.iitidx.com/qv/idt_redirect.app?MODAL=idt_er Internet

This screen is used to enter email addresses for the Insured.

The Email Type drop-down allows you to create multiple email addresses for the same person.

Additional Options

There are additional options found on the left hand side of the screen.

- **Carrier/Applicant** – Clicking the Carrier/Applicant link will take you to the Carrier/Application section of the Screen.
- **Case** – Clicking the Case link will take you to the Case section of the Screen.
- **Requirements** – Clicking the Requirements link will take you to the Requirements section of the Screen.
- **Put on Hold** – Sometimes when you are creating an order, you may need exit the system and return later to the order.

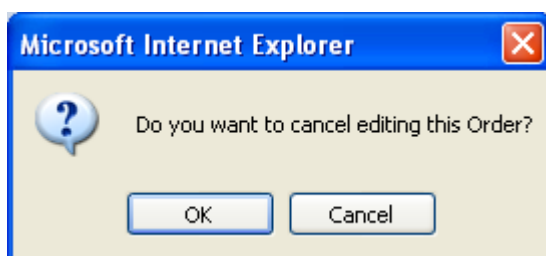
If you click Put on Hold the “Order Status” screen will be displayed. The “Order Details” screen will still be visible. You will have the ability to click on the “Back to View Order” tab to go back to the “New Order” screen that was displayed prior to clicking Put on Hold.

To put an order on hold, click Put on Hold on the left side of screen while in the Order Details screen. On returning to the order, click the Back to Order button at the top of the screen.

NOTE

You can only work on one new order at a time. If you put an order on hold, you must either finish the order or cancel it next time you enter the system.

- **Cancel Editing** – Clicking the Cancel Editing link will display a confirmation screen where you can confirm that you wish to stop editing the order. This is cancelling the order without saving.



Submit Order

Clicking **Submit Order** will submit orders for processing. It is in each of the three sections of the screen to eliminate the need to scroll to the bottom of the screen.

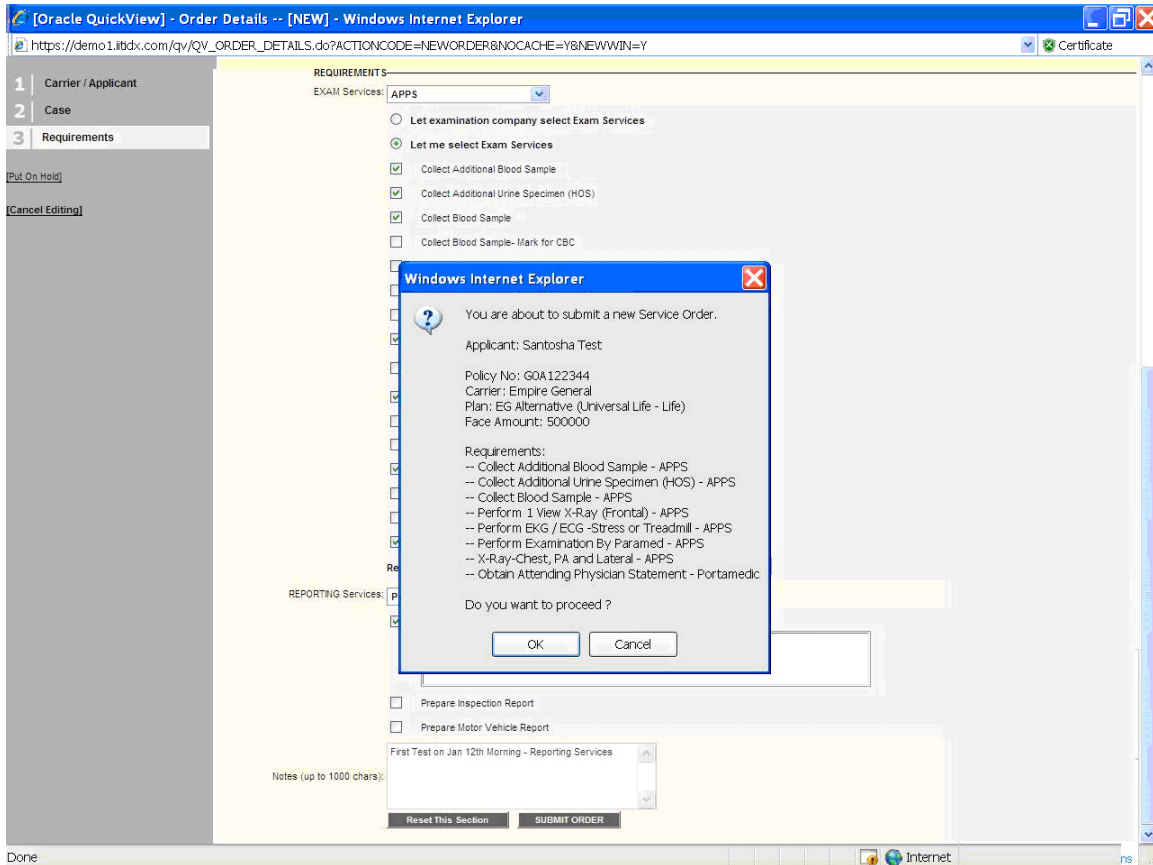
Once all the required information has been entered:

Click **Submit Order**.

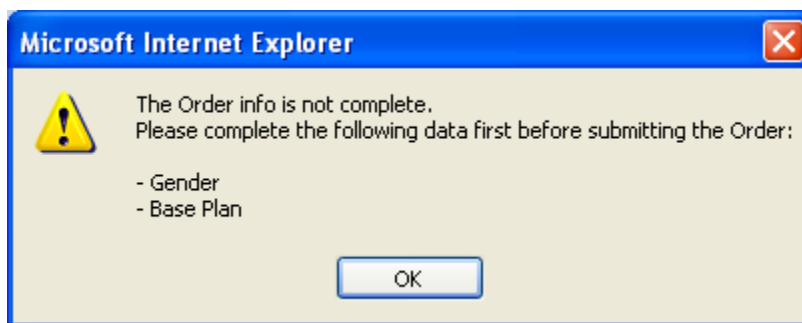
A confirmation screen will be displayed. Use this screen as a confirmation that the information that has been entered on the screen is correct.

If the information is correct, click **OK**. The Service Order will be created and routed to the Service Provider.

If the information is incorrect and needs editing, click **Cancel** to go back to the Order Detail screen and make any modifications.



If all the required information has not been entered, an Incomplete Order Screen will be displayed identifying the Required Values that have not been entered and are required.



- Click **OK** to remove Error screen and return to the Order Details screen to enter the missing information.

Service Orders Tab

The Service Orders tab has four options:

- **New Order** – to place a new order.
- **Updates** – displays the orders for your agent number that have been updated since the last time you logged in.
- **Summary** – a listing of all orders for your agent number.
- **Orders** – the order details of the order you are currently in.

Updates

The Updates screen lets you immediately see where your orders are in the process. The Updates screen shows only those orders *recently updated*. Recently updated means those service orders where a *Service Order Status Message* has been received since the last time you logged in.

The screenshot displays the Oracle QuickView Service Orders Updates screen. The browser window title is "[Oracle QuickView] - Orders - Windows Internet Explorer". The address bar shows the URL: https://demo1.ittdx.com/qv/QV_ORDERS.do?ACTIONCODE=REFRESH. The application header includes the Oracle Insurance logo and "QuickView | Service Orders". Navigation links for "Logout", "Home", and "Help" are present. The main content area features a search sidebar on the left and a table of service orders on the right. The table has columns for Date, Applicant Name, SSN, Policy Number, Provider, Case, Status, SSN, DOB, Entered Date, and Provider Order ID. Four rows of data are visible, all with a status of "Submitted".

Date	Applicant Name	SSN	Policy Number	Provider	Case	Status	SSN	DOB	Entered Date	Provider Order ID
01/12/2009	Test, Santosha	4580834	007-94-45808787-45806786	APPS	2	Submitted	586-89-8345	01/07/1979	01/12/2009 10:13:58 AM	
01/09/2009	Test, Matt E	007-94-45808218-45806217		APPS	4	Submitted to Provider	573-00-8010	01/01/1960	01/09/2009 11:48:39 AM	
01/09/2009	RajaTest, RamooTest	007-94-45805704-45805703		APPS	2	Submitted	878-24-8565	01/12/1980	01/09/2009 10:10:49 AM	

The search sidebar on the left includes fields for "Applicant first or last Name:", "Applicant SSN:", "Applicant DOB (MM/DD/YYYY):", "Policy Number:", "Service Provider (Reset)", "Order Status", "Order Number:", and "Provider Order ID:". There are also "RESET" and "SEARCH" buttons at the bottom of the sidebar.

You can customize what orders are displayed on the Updates screen by editing your Service Order Settings. To change your criterion for order update notification, go to **Tools**➤**Preferences** and click **Service Order Settings**. Then scroll down and use the dropdown menu for **Display Order with Updates** to select the criterion your want.

Introduction to Summary

When you click the **Summary** link, you will be taken to the **Order Summary** screen.

The screenshot shows the Oracle QuickView Service Orders interface. The 'Order Summary' tab is highlighted with a red circle. The main content area displays a table of service orders with the following data:

Applicant first or last Name:	Applicant SSN:	Applicant DOB (MM/DD/YYYY):	Policy Number:	Service Provider:	Order Number:	Provider Order ID:	Status	SSN	DOB	Entered Date	Provider Order ID
Test, Santosha	007-94-45608787-45608788	01/09/2009		APPS			Submitted	586-89-8345	01/07/1979	01/12/2009 10:13:58 AM	
Test, Mark E	007-94-45608218-45608217	01/09/2009		APPS			Submitted to Provider 573-00-9010	586-89-8345	01/07/1979	01/12/2009 10:13:43 AM	
RajaTest, RamboTest	007-94-45605704-45605703	01/09/2009		APPS			Submitted	878-24-6565	01/12/1980	01/09/2009 10:10:49 AM	

The Summary screen has three tabs located on the far right side of the screen:

- **Order Summary** – The Order Summary screen is used to display all service orders created by each service provider
- **Order Status** – The Order Status screen shows the status of all orders in the system.
- **Order Details** – The Orders Details screen displays the read only details for the row chosen from the Update Screen.

Order Summary

The Order Summary screen is used to display all service orders created by each service provider. Service Providers will be listed along with the total number of service orders created for each one.

You can drill down into the service provider details by clicking the service provider name. This will expand the list to include order status. By drilling down even further, you can view the insurance companies that have service orders with the provider and status.

The screenshot displays the Oracle QuickView interface for the Order Summary screen. The browser window title is "[Oracle QuickView] - Order Summary - Windows Internet Explorer" and the address bar shows "https://demo1.itbdx.com/qv/QV_ORDER_SUMMARY.do". The page header includes the Oracle logo and "INSURANCE QuickView | Service Orders". The navigation menu includes "Tools", "Policies", "Commission", and "Service Orders". The search bar is set to "Order (by Applicant Name)".

Service Provider > Order Status > Insurance Company > Agency	Total Orders
→ APPS	4
→ Portamedic	3
→ MediConnect	1

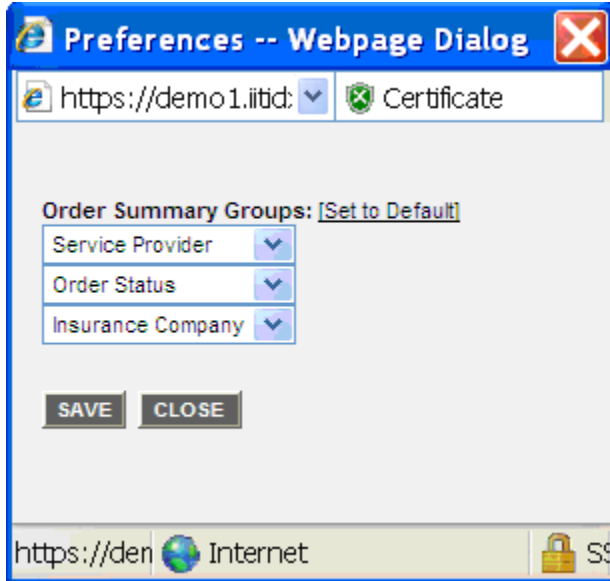
The callout box shows a detailed view of the "Submitted" status for APPS:

- Submitted
 - Submitted to Provider
 - Empire General Life
 - UNASSIGNED
 - Portamedic
 - MediConnect

Clicking the number of Total Orders will place you on the Order Status screen where the orders that fall into the category that was chosen will be displayed.

Pref

Click the **Pref** link on the Order Summary screen will bring up the Preferences screen. On this screen, you can select the grouping displayed on the Order Summary screen.



Order Status

The Order Status screen shows a summary view of the orders for that agent number.

The screenshot shows the Oracle QuickView Service Orders interface. The main content is a table with the following columns: Status Updated, Applicant Name, Order Number, Provider, Case, Status, SSN, DOB, Entered Date, and Provider Order ID. The table contains four rows of data.

Status Updated	Applicant Name	Order Number	Provider	Case	Status	SSN	DOB	Entered Date	Provider Order ID
01/12/2009	Test, Santosha	007-94-45606787-45606834	APPS	5	Submitted	586-89-8345	01/07/1979	01/12/2009 10:13:58 AM	
01/12/2009	Test, Santosha	007-94-45606787-45606786	APPS	5	Submitted	586-89-8345	01/07/1979	01/12/2009 10:13:43 AM	
01/09/2009	Test, Ilan E	007-94-45606218-45606217	APPS	4	Submitted to Provider	573-00-9010	01/01/1960	01/09/2009 11:48:39 AM	
01/09/2009	RajaTest, RamboTest	007-94-45605704-45605703	APPS	2	Submitted	878-24-6565	01/12/1980	01/09/2009 10:10:49 AM	

Kinds of Order Status

A Service Order will have one of the following statuses:

Status	Meaning
New	Order entered but not yet submitted to the Service Provider.
Submitted	Order originated from the Service Provider. The request has already been submitted.
Submitted to Provider	Order entered and submitted to the Service Provider.
In Process with Provider	Service Provider responded with a status on the Order.
Completed	All Services on the order have been either (a) completed or (b) completed and canceled.
Canceled	All services on the order have been cancelled.

To review the status of your orders, scan the orders column within the Order Status Screen. You can see more case details by clicking on the case number.

NOTE The Update screen will also help you review orders that have recently changed status.

NOTE If the status is completed, you can tell where it came from by looking at the order history.

Each Row on the **Order Status – Update** screen will have the following columns:

Field Name	Description
Applicant Name	Name of Applicant.
Order Number	System generated number associated with the Service Order.
Provider	Service Provider name associated with the Service Order.
Case	System generated Case Number assigned to the Service Order.
Status	Status associated with the Service Order.
SSN	Social security number of Applicant associated with the Service Order.
DOB	Date of birth of Applicant associated with the Service Order.
Entered Date	The date the Service Order was entered.
Provider Order ID	System generated ID assigned to the Service Order based on the Service Provider.

Case

Clicking the case number will place you on the Order Details screen. The Orders Details screen will display read only details for the row chosen from the Update Screen. The data display will be data that was entered on the New Orders screen when the order was created.

Order Details

The Orders Details screen has the details of the row selected on the Update Screen. The data displayed will be the data that was entered when the order was created. This screen is read only.

The screenshot shows the Oracle QuickView Service Orders page. The page header includes the Oracle logo, 'QuickView | Service Orders', and navigation links for 'Logout', 'Home', and 'Help'. Below the header, there are tabs for 'Tools', 'Policies', 'Commission', and 'Service Orders'. A search bar is located on the right side of the page.

The main content area displays the following order details:

- Entered Date: 01/12/2009
- Carrier: Empire General Life
- Provider: apps
- Agency: test, test
- Agent: test, test
- Agent No: APP341
- Agent Phone: 415-879-0604
- Agency Phone:
- Applicant: Test, Santosha
- Face Amount: 500,000.00
- Service Order Status: submitted
- Other Requirements: First Test on Jan 12th Morning - Reporting Services

Below the details is a table titled 'Preferences' with the following columns: Requirement ID, Description, Requested Date, Status, Status Date, Reason, and Location. The first row is circled in red.

Requirement ID	Description	Requested Date	Status	Status Date	Reason	Location
ITQV-apsagent-20090112101235-Req1_1	Perform EKG / ECG -Stress or Treadmill	01/13/2009	Outstanding	01/12/2009		
ITQV-apsagent-20090112101235-Req1_2	X-Ray-Chest, PA and Lateral	01/13/2009	Outstanding	01/12/2009		
ITQV-apsagent-20090112101235-Req1_3	Perform 1 View X-Ray (Frontal)	01/13/2009	Outstanding	01/12/2009		
ITQV-apsagent-20090112101235-Req1_4	Collect Additional Blood Sample	01/13/2009	Outstanding	01/12/2009		
ITQV-apsagent-20090112101235-Req1_5	Collect Blood Sample	01/13/2009	Outstanding	01/12/2009		
ITQV-apsagent-20090112101235-Req1_6	Collect Additional Urine Specimen (HOS)	01/13/2009	Outstanding	01/12/2009		

At the bottom of the page, it says 'Writing Agent User: test test' and 'Copyright © 2008, Oracle. All rights reserved.'

Order History

To view the history of an order, navigate to the Order Requirements section of an order. Look for a gold arrow to the left of the Requirement ID. If you see one, there is a status history for this order. Click on the arrow and the status history will be shown.

Orders

The Orders screen will display the details of the order that you are currently in. To view order details, select an order on the Summary screen and then select the Orders option from the drop down menu.

Oracle Insurance QuickView | Service Orders

Logout Home Help

Tools Policies Commission Service Orders Order Summary Order Status Order Details

Search: Order (by Applicant Name) GO

Search Options

Applicant first or last Name:

Applicant SSN:

Applicant DOB (MM/DD/YYYY):

Policy Number:

Service Provider:

Order Status:

Insc:

Order Number:

Provider Order ID:

Status Updated:

Entered Date:

RESET SEARCH

Orders

Company > Agency	Total Orders
New Search	
Submitted	4
Submitted to Provider	3
Empire General Life	1
UNASSIGNED	1
Portamedic	3
MediConnect	1

Writing Agent User: test test Copyright © 2008, Oracle. All rights reserved.

Done Internet 100%

Searching

There are two search tools available for finding orders quickly:

- The **Quick Search**, located at the top right hand side of the screen.
- The **Detailed Search**, located on the left side of the screen.

Quick Search

A quick search can be done to find an order quickly. Any screen with a search menu on the upper right hand side of the page will allow for a quick search. Quick searches are done on all orders for that agent number by a specific criterion.

The screenshot shows the Oracle QuickView Service Orders interface. The search menu is circled in red and contains the following options: Order Summary, Order Status, and Order Details. The search criteria dropdown is set to "Order (by Applicant Name)".

Order Status	Total Orders
Submitted	4
Submitted to Provider	2
Empire General Life	1
UNASSIGNED	1
Portamedic	3
MediConnect	1

To do a Quick Search:

- Select the criteria you want to search by from the drop down menu.
- Enter in the parameters of the criteria in the text box.
- Click **Go**. The results will be displayed below.

For example, if you want to search for all orders by applicant name, you would select Order by Applicant Name from the drop down and enter in the name you want in the text box.

The quick search list is smaller and more concise than the detailed search.

Detailed Search

You can do a more detailed search by using the search tool on the left side of the screen. You can enter in as many search criteria as you want. Generally, the more search criteria you enter will reduce the number of results returned.

When using this tool to search through a lot of records, it is recommended that you first click on **Order Status**. The Order Status field allows you to select the status of all the orders you want to search through. This may reduce the number of orders returned and allow you to find the order you need quickly.

The screenshot shows the Oracle Insurance QuickView Service Orders search interface. At the top, there is a navigation bar with the Oracle logo, 'INSURANCE', 'QuickView', and 'Service Orders'. Below this is a sub-navigation bar with 'Tools', 'Policies', 'Commission', and 'Service Orders'. The main interface is split into two columns. The left column, titled 'Search Options', contains several search criteria: 'Applicant first or last Name:', 'Applicant SSN:', 'Applicant DOB (MM/DD/YY):', 'Policy Number:', 'Service Provider', 'Order Status', 'Insco', 'Order Number:', 'Provider Order ID:', 'Status Updated', and 'Entered Date'. At the bottom of this column are 'RESET' and 'SEARCH' buttons. The right column, titled 'Service Provider > Order Status > Insurance Company > Agency', shows a hierarchical list of search results. It includes a 'Hide Search Options' link and a 'Pref' link. The results are: 'APPS', 'Submitted', 'Submitted to Provider', 'Empire General Life', 'UNASSIGNED', 'Portamedic', and 'MediConnect'.

Searches can be performed on any of the following fields:

- Applicant First Name
- Applicant Last Name
- Applicant SSN
- Applicant DOB
- Policy Number
- Service Provider
- Order Status
- Inscó
- Order Number
- Provider Order ID
- Status
- Entered Date

There are five fields that will allow you to enter or select additional options to search on: Service Provider, Order Status, Inscó, Status Updated, and Entered Date. To view the options available, click on the underlined field.

Service Provider – This field will display all of the service providers for your agent number. First, click the Service Provider field. A list box of providers will be displayed. You can select one or more providers to search on. Next, select the first provider you want to search on. To select more than one provider, hold down the CTRL key when you make your additional selections. When you leave this field, the options you have selected will be listed.

Order Status – To limit your search to all orders that have results, you can select a status option under the **Order Status** field. First, click the Order Status field. A list box of statuses will be displayed. You can select one or more statuses to search on. Next, select the first status you want to search on. To select more than one status, hold down the CTRL key when you click the statuses you want. When you leave this field, the options you have selected will be listed.

Inscó – This field will display all of the insurance companies for your agent number. First, click the Inscó field. A list box of insurance companies will be displayed. You can select one or more insurance companies to search on. Next, select the first insurance company you want to search on. To select more than one insurance company, hold down the CTRL key when you make your additional selections. When you leave this field, the options you have selected will be listed.

Status Updated – This field allows you to select the date range of when your order was updated. First, click the Status Updated field. Then, enter in the date range. You can manually type in a date or choose one from the calendar.

Entered Date – This field allows you to select the date range of when your order was entered. First, click the Entered Date field. Then, enter in the date range. You can manually type in a date or choose one from the calendar.

Before starting a new search, it is good practice to click the RESET button. This clears out the fields so you are only searching on the parameters you want.

Hiding the Search Bar

Search options can be left on screen or hidden. Hiding search options will make more work space on the screen. If you want to hide the search options, click the **Hide Search Options** link displayed at the top of the screen. Clicking the **Hide Search Options** link a second time will restore the search options.

Support

If you receive an error or need a question answered, please contact Oracle Insurance QuickView Support at 1-888-486-4683 Ext.4 or send an e-mail to [QuickView Support](#).

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

Index

	Order	22			
	Home Page	7			
<hr/>					
A					
	Adding Email Addresses	13			
	Adding New Order	10			
	Adding Notes	11			
	Adding Phone Numbers	13			
	Adding Physician Detail	12			
	Adding Requirements	11			
	Applicant Information	11			
<hr/>					
B					
	Browser Configuration	4			
<hr/>					
C					
	Cancel Editing Link	14			
	Carrier Information	11			
	Carrier/Applicant Link	14			
	Case Information	11			
	Case Link	14			
	Case Number	21			
	Clearing				
	Temporary Files	5			
	Conditionally Required Fields	9			
<hr/>					
D					
	Detailed Search	25			
	Drill Down	8			
	Drop Down Menus	9			
<hr/>					
E					
	<i>Edition Notice</i>	2			
	Email Addresses				
	Adding	13			
	Entered Date				
	Search	26			
	Exam Services	11			
<hr/>					
H					
	Highlighted Fields	9			
	History				
<hr/>					
	Order	22			
	Home Page	7			
<hr/>					
I					
	IE Settings				
	Removing Standard Buttons	5			
	Inactivity	5			
	Incomplete Order Screen	15			
	Insco				
	Search	26			
<hr/>					
L					
	Locked Account	8			
	Logging In	7			
<hr/>					
N					
	New Order				
	Adding	10			
	New Orders				
	Put on Hold Link	14			
	Notational Conventions	5			
	Notes				
	Adding	11			
<hr/>					
O					
	Order History	22			
	Order Requirements				
	History	22			
	Order Status	17, 20, 25			
	Search	26			
	Order Status – Update	21			
	Order Summary	17, 18			
	Orders Details	17, 22			
	Orders Screen	23			
<hr/>					
P					
	Password	7			
	Phone Numbers				
	Adding	13			
	Physician Detail				
	Adding	12			
	Popup				

Email Addresses	13
Phone Numbers	13
Popup Blocker	4
Popup Screens	9
Pref Link	19
Preferences	
Setting	8
Put on Hold	14

Q

Quick Search	24
QuickView	
Description	4

R

Recently Updated	16
Removing Standard Buttons	5
Requirements	
Adding	11
Requirements Information	11
Requirements Link	14

S

Service Order	
Status	20

Service Order Settings	8, 17
Service Orders	16
Service Provider	
Search	26
Sorting Lists	8
Status of Service Order	20
Status Updated	
Search	26
Submit Order	14
Summary Link	17
Support	27

T

Temporary Files	5
Timeout	5
Tools	
Setting Preferences	8, 17
Total Orders	18

U

Updates Screen	16
UserID	7