Customize Submission Intake

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The submission orchestration intake workflow is the most important workflow in the Cora Underwriting Manager system. The submission intake workflow handles the first intake step in every Underwriting process and orchestrates between various steps which are required to complete a successful submission intake process.

You can customize each step in the workflow per your need.
Follow the steps below:

1. In the Administration site, go to **Workflows**>**All Workflows**, and duplicate the template workflow, which currently performs the step.
2. Update the workflow per your needs.
   Most of your changes will be inside the Work container in the workflow.
3. Duplicate the error handler template workflow, which currently handles errors for the step, and then change the logic or tasks per need.

   NOTE
   The logical exception task must have a Task view, which will be displayed in the Submission's Task tab in case of logical exception.

4. Go to **Administration**>**Lookup Tables**>**UWM Workbench**, and in the UWM Customized WFs References lookup change the SubFlow and ExceptionSubFlow column values of the workflows.

NOTE
Don't add any new rows to the table, but only update the existing rows, and change in each line the SubFlow column to the name of the workflow you have created.

Submission intake steps and their current logic

Step Name	Out-of-the-box behavior	Out-of-the-box Error Handler behavior	Comments
Check if non submission	The workflow checks if the current submission is not a new submission according to the key words.	Technical exception task is opened in case of process failure.	Key words can be modified from **UWM Check if Non Submission Template** lookup>**Non Submission Key Words**
Set TAT	Calculates the submission turn around time on the basis of TAT, TAT unit and calendar properties.	Technical exception task is opened in case of missing data or process failure.	-

Step Name	Out-of-the-box behavior	Out-of-the-box Error Handler behavior	Comments
Extraction	The workflow uploads the *msg* file to the dedicated folder for extraction service, and send the details to extraction service. The workflow handles the call back and checks if all the details are received or an exception should be created. The workflow also sends the JSON results to the other dedicated workflow, which handles the current submission LoB and save the necessary fields for the specific LoB. Extraction with Acord Transcriber service: Submission with LoB Commercial Property are sent to extraction with Acord. The workflow calls the Acord Extraction workflow, which can be replaced from Customized Wfs lookup. The exception is handled in the same workflow in the task Logical Exception.	Out-of-the-box flow has an example for two scenarios: 1. With extraction model (product liability LoB), the logical exception displays form with all the relevant fields (this is the exception management UI of Eaas). 2. Without extraction model (commercial property LoB), a task is created with all the required fields to be extracted manually.	All the EaaS configuration can be found under application variables. The variable name starts with EaaS.
Get Broker	The workflow checks: • if the producer (the requestor of the submission) aligns with any Broker firm. • If the broker exists in the broker list. • If the broker has valid license.	In case the producer is not aligned to a broker, the exception shows brokers list and the user selects from the list. The system then saves the broker and aligns the producer to this broker. In case the broker doesn't have a license, the user (or system administrator) fixes the record (change the "Has License" value.	The lists of producers and brokers can be found under UWM Workbench lookup.
Get Underwriter	The workflow checks if there is an Underwriter associated with the submission broker and assigns an Underwriter to the submission.	In case no underwriter is found, the user selects an Underwriter from the list.	Underwriter-Broker mapping can be modified in the lookup **UWM Get UW template**>**Underwriter per Broker**.

Step Name	Out-of-the-box behavior	Out-of-the-box Error Handler behavior	Comments
Get GeoCode	The workflow sends the address to Azure Maps service, and gets in response the attitude and latitude.	In case of exception, the user selects the location on the map and the system saves the geo code.	-
Get Insured Verification	The workflow sends the geo code and Insured name to the Azure Maps service, and checks if name exists in the location.	In case the business isn't found at all, then the user adds different insured name. If some businesses are found in the address, then the user selects one of them.	-
Create submission in PAS	The workflow sends the insured name, his address and phone to the STUB web service and retrieve random number as PAS (Policy Admin System) ID.	Only technical exception is possible (For example, network issues, PAS is down).	This workflow must change for real implementation with integration to real PAS.
Clearance	The workflow sends the insured name and LoB to the STUB web service, and checks if a record with the same name and LoB already exists.	If yes, the exception displays, and the user has to reject or approve the submission.	This workflow must change for real implementation, with integration to real PAS. The goal is to check that there is no identical submission already created in the PAS.
Upload to DMS	The WF uploads all the documents to SP. It creates a folder with the submission ID (case id).	Technical exception task opens in case of process failure.	-

Step Name	Out-of-the-box behavior	Out-of-the-box Error Handler behavior	Comments
Sanction check	The workflow: • sends the Insured entity name and country code to the D&B service, and receives DUNS number. • sends this DUNS number to another D&B API, which receives all the Beneficial owner's info of the sent entity. • sends Beneficial owner info to another API, which checks if there is any sanction against the individual owner.	If the DUNS number couldn't be found or there is more than one option then an exception is created, and the user needs to select the correct record or to search with different criteria. If sanctions are found for one or more from the beneficial owners then an exception is opened, and the user has to decide whether to close the submission or to continue with the process (notify UW).	The sanctions check audit trail can be retrieved from submission details tab.
Submission intake completion notification	The workflow sends a summary email to the assigned Underwriter and notifies that the submission intake phase is complete. The email contains the Policy number, Insured Name, Submission PAS, and the sanctions check results.	Technical exception task opens in case of process failure.	-

NOTE
After each exception the system performs the step again, verifies if the data is valid, and then continues to next stage, or opens exception again, if required.