# Claim Registration Using RPA

**Description:**

Many insurance companies are struggling to process large number of claim requests, as this is a repeated task for the customer support executives for processing big set of claims. To solve this problem we are using RPA automation to register multiple claims for immediate processing in motor and general insurance.

The automated process, is a trending technology to reduce human repeated works like data entry. The insurance company has to register a claim, for the given insurance policy number and also has different registration processes according to the insurance applied by the client.

This project is based on claiming Motor policies in general insurance with different types of coverage’s, RPA uses the policy number as a key input to proceed which are provided by the insurers so it can be accessed through an excel file, hence each policy can get registered if it is a valid request, after the verification of various factors (like black listing of vehicles, clients, engines & chassis) and all these processes are automated to have time efficient process to satisfy the client needs.

**TOOLS USED  
UiPath IDE:**   
             UiPath is a software structure to improve automation applications. It runs on Microsoft Windows and it was settled on the top of Net framework and Windows workflow base tools. UiPath scores best in technology category.   
              There are three main components in UiPath. UiPath Studio is a tool that enables you to design automation processes in a visual manner, through diagrams. UiPath Robot executes the processes built in Studio, as a human would. UiPath Orchestrator is a web application that enables you to deploy, schedule, monitor and manage Robots and processes.

**TECHNOLOGY TO BE USED:** UiPath tool

**Module details:**

Excel Automation

Image scrapping

PDF Generation

Mail Automation

1. **Excel Automation**

Here customer support executive need to gather client (they are the Insured persons generally) insurance claim request and save in the excel sheets separating it by Motor Vehicle insurance and Non-Motor insurance Policy; the data are stored in separate excel sheets.

To Cross check the Input data separate excel sheets is used as sample model database sheet and to validate the Black list another sheet which is specific the Black list of Things that need to be validated. The Filed for the sheets are given below:

**Motor Input – Excel sheet with fields**

Policy no

Date of Loss

Place of Accident

**Non-Motor Input for cross product checking - Excel sheet with fields**

Policy no

**Client Details - Excel sheet with fields**

ID

Name

Policy No (Primary key)

Email

Phone No

Created Date

Policy Type

Renewed

Age Policy

No of Claim

Premium Amount

Claimed Amount

Sum Insured

Health Policy

Vehicle No

Chassis No

Engine No

**Blacklist – Excel Sheet with fields**

Insurer Blocked

Vehicle Number Blocked

Chassis Blocked

Engine Number Blocked

1. **Image Scrapping**

The Bills from the Customer are image scrapped and total bill amount is stored for checking it with total sum insured and with other claim details.

1. **PDF Generation**

The Validate process of cross checking the Blocked list and if the personal accident policy is requested for the claim in the non-motor sheet then the requested personal accident policy is process for claim registration. If the holder is validated without any blocked list then all the details of the Insurer holder and policy details are entered in the word template and exported as PDF.

1. **Mail Automation**

The Validate of the blocked list if the insurer policy number , Engine Number, Chassis Number, Vehicle Number are checked if they are blocked then mail is sent to the client that their respective is blocked.

When the user is eligible all the user details are entered in the word template and exported as PDF and attaches the PDF to the user mail where these all the automation process are processed by bot.

**OUTPUT:**

**Note: Here the output is a PDF file, please mention the output details if it is an image / any other data. Should show a format of PDF / image / other data details here.**