

Lesson 6 Configuring Claim History

ClaimCenter provides a history functionality that tracks important events and actions related to each claim. Insurers can also add new event and action types to track anything of importance. Since the history records are not editable, they stand as defensible records of actions taken on a claim.

6.1 Track changes to salvage status field



Exercise

Succeed Insurance requires change tracking to the Salvage Status field.

- You may use the existing Data Change custom history type or create a new one.
- The description should provide both the “from” and “to” values of the field.

Prerequisites

This lesson assumes that you have successfully completed the **ClaimCenter Configuration Kickstart** course.

For this exercise, you will use **ClaimCenter** and a supported web browser.

ClaimCenter Server should be running in debug mode when you start the exercise.

Exercise 1: Track changes to salvage status field

1. Add a typecode to the CustomHistoryType typelist (optional)

code	Ext_SalvageStatusChanged
name	Salvage Status Changed
desc	Salvage Status Changed

2. Add a Claim Preupdate rule to write the records.

- a) Name it CPU00500 – Salvage status change history
- b) Use the isFieldChanged() and getOriginalValue() functions.

Test procedure

1. Reload changed classes (or restart ClaimCenter server).
2. Log in to ClaimCenter as aapplegate/gw.
3. Navigate to the Bill Kinman claim (235-53-425891).
4. In the sidebar, select Summary ➔ Status.
5. Click Edit.
6. Change the Salvage Status field to In review.
7. Click Update.
8. In the sidebar, select History.
9. Verify that the “Salvage status changed” entry is present at the top of the History list.



Stop