

# Lesson 6 Claim Setup

## Prerequisites

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

ClaimCenter Server and Contact Manager should be running when you start the exercise.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

## 6.1 Exercise: Segmentation



### Activity

In this section, you create a simple claim that involves a windshield break. You then examine how it was segmented.

1. Log on to ClaimCenter as studentXX with a password of "gw".
2. The following transcript comes from a customer phone call received by Succeed Insurance which details a first notice of loss. Based on this transcript, create a claim using the Auto Claim wizard.

In creating the claim:

- Assume that the phone call was received on the same day that you are doing this exercise.
- Do not assign the claim using automated assignment rules. Assign the claim to studentXX.
- For data that is required but not specified in the transcript, use any value.
- **IMPORTANT:** Remove the automatically created exposure in the last step of the New Claim Wizard.

Note: Replace the "XX" in all names that follow with your two-digit student ID.

## Transcript

Hello. My name is Kevin SmithXX. My policy number is 123456-XX. A rock hit my windshield this morning on my way to work and cracked the windshield.

You want to confirm my contact information? I live at 1024 Glenwood Avenue in Waukegan, Illinois. It's probably best to call me on my home phone. It's (312) 336-6210. Yes, I should be the person you contact for questions about this claim. The accident involves my Honda Civic.

It happened near McAree Road and Grand Avenue in Waukegan, Illinois. I was driving my Honda Civic on Grand Avenue traveling south when a truck passed. A rock flew up from the road and cracked the windshield.

**IMPORTANT:** Do not assign the claim using automated assignment rules. Under Claim assignment, assign the claim and all exposures to yourself. Remove all exposures before creating the claim.

Examine the claim.

- 1. What is the Claim Segment?**
- 2. How many incidents are there?**
- 3. Why do you think this claim was segmented the way it was?**
- 4. In the previous exercise, you created a claim that was segmented as mid-complexity. Why do you think it was segmented that way?**

## 6.2 Solution: Segmentation



- 1. Log on to ClaimCenter as studentXX with a password of "gw".**
- 2. Screenshots from creating the claim based on the transcript:**

Step 1 of 5: Search or Create Policy

( Find Policy  Create Unverified Policy)

Policy #	123456-99	SSN or Tax ID	
First name		Country	<none>
Last name		City	
Organization Name		State	<none>
Policy Type	<none>	ZIP Code	#####-####
Loss Date	MM/dd/yyyy	VIN	

Policy #	Insured	Address	City	State	ZIP Code	Effective	Expires	Type
123456-99	Kevin Smith99	1024 Glenwood Avenue	Waukegan	Illinois	60085	05/09/2018	05/08/2019	Personal Auto

New Claim

Loss Date \* 08/21/2018

Time 12:01 AM

Type of Claim \*  Auto  
 Auto - Auto First and Final  
 Auto - Quick Claim Auto

Claims History

Status	Claim	Loss Date	Description
Open	000-00-000212	08/19/2018	I was trying to make it through a yellow light, I hit the intersection and hit a car traveling we

## Step 2 of 5: Basic information

<b>Reported By</b>	<b>Involved Vehicle(s)</b>
How Reported	<input type="checkbox"/> 2002 Mini Cooper (4FRT299 / Illinois)
Name	* Kevin Smith99
Relation to Insured	* Self/Insured
Date of Notice	08/21/2018 <input type="button" value="Edit"/>
<b>Verify Date of Birth</b>	
Date of Birth	
<b>Confirm Contact Info</b>	
Address	1024 Glenwood Avenue, Waukegan, IL 60085
Work Phone	<input type="text"/>
Home Phone	312-336-6210
Mobile	650-333-3333
Primary Phone	Home <input type="button" value="Edit"/>
Email	KJSmith@kmail.com
<input type="button" value="Edit Contact"/>	
<b>Insured</b>	
Name	Kevin Smith99
Address	1024 Glenwood Avenue, Waukegan, IL 60085
Primary Phone	312-336-6210
<b>Main Contact</b>	
Same Person?	<input checked="" type="radio"/> Same as reporter <input type="radio"/> Different person

## Step 3 of 5: Add claim information

What Happened?	<input type="text"/> Rock hit the windshield.	<input type="button" value="Cancel"/>																								
Loss Date	08/21/2018 12:01 AM																									
Loss Cause	* Glass breakage																									
Incident Only?	<input type="checkbox"/>																									
<table border="1"> <tr> <td>Location</td> <td>* McAree Road and Grand Avenue, Waukegan, IL</td> </tr> <tr> <td>Country</td> <td>United States</td> </tr> <tr> <td>Address 1</td> <td>McAree Road and Grand Avenue</td> </tr> <tr> <td>Address 2</td> <td><input type="text"/></td> </tr> <tr> <td>Address 3</td> <td><input type="text"/></td> </tr> <tr> <td>City</td> <td>* Waukegan <input type="button" value="Get Address"/></td> </tr> <tr> <td>County</td> <td><input type="text"/></td> </tr> <tr> <td>State</td> <td>* Illinois</td> </tr> <tr> <td>ZIP Code</td> <td><input type="text"/> #####-#### <input type="button" value="Get Address"/></td> </tr> <tr> <td>Location Description</td> <td><input type="text"/></td> </tr> <tr> <td>Location Code</td> <td><input type="text"/></td> </tr> <tr> <td>Jurisdiction</td> <td>Illinois</td> </tr> </table>			Location	* McAree Road and Grand Avenue, Waukegan, IL	Country	United States	Address 1	McAree Road and Grand Avenue	Address 2	<input type="text"/>	Address 3	<input type="text"/>	City	* Waukegan <input type="button" value="Get Address"/>	County	<input type="text"/>	State	* Illinois	ZIP Code	<input type="text"/> #####-#### <input type="button" value="Get Address"/>	Location Description	<input type="text"/>	Location Code	<input type="text"/>	Jurisdiction	Illinois
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<b>Vehicles, People, &amp; Property</b>																										
<input type="button" value="Add Vehicle"/> <input type="button" value="Add Pedestrian"/> <input type="button" value="Add Property Damage"/> <table border="1"> <tr> <td>2004 Honda Civic</td> <td><input type="button" value="Edit"/></td> </tr> <tr> <td>Illinois</td> <td></td> </tr> <tr> <td>1JXZ199</td> <td></td> </tr> </table>			2004 Honda Civic	<input type="button" value="Edit"/>	Illinois		1JXZ199																			
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Illinois																										
1JXZ199																										

Step 5 of 5: Save and Assign Claim

<b>Assignment</b> <input checked="" type="radio"/> Assign claim and all exposures to: * Sam Tudent99 (Training Group 99) <input type="button" value="Search"/> <input type="radio"/> Assign Claim and Exposures Individually Claim Assignment: Use automated assignment	<b>New Note</b> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>																								
<b>Exposures</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #009640; color: white;">New Exposure</th> <th style="background-color: #009640; color: white;">Remove</th> <th colspan="6"></th> </tr> <tr> <th>#</th> <th>Type</th> <th>Coverage</th> <th>Claimant</th> <th>Involving</th> <th>Status</th> <th>Created Via</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>1</td> <td>Vehicle</td> <td>Comprehensive</td> <td>Kevin Smith99</td> <td>2004 Honda Civic (1JXZ199 / Illinois)</td> <td>Draft</td> <td>Business Rule</td> </tr> </tbody> </table>		New Exposure	Remove							#	Type	Coverage	Claimant	Involving	Status	Created Via		<input checked="" type="checkbox"/>	1	Vehicle	Comprehensive	Kevin Smith99	2004 Honda Civic (1JXZ199 / Illinois)	Draft	Business Rule
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<input checked="" type="checkbox"/>	1	Vehicle	Comprehensive	Kevin Smith99	2004 Honda Civic (1JXZ199 / Illinois)	Draft	Business Rule																		

Examine the claim.

### 1. What is the Claim Segment?

**Spec 1** Auto – Low complexity (Tip: If this answer does not match yours, you did not remove the automatically created exposure in the last step of the New Claim wizard).

### 2. How many incidents are there?

**Spec 2** 1 – Honda

### 3. Why do you think this claim was segmented the way it was?

**Spec 3** Since this is *only* a windshield, it is not going to take much effort to settle the claim.

### 4. In the previous exercise, you created a claim that was segmented as mid-complexity. Why do you think it was segmented that way?

**Spec 4** Because there were multiple vehicles involved and an injury.

## 6.3 Exercise: Examine the Workplan



### Activity

In this section, you examine the workplan of the claim you just created as well as the more complex claim you created in the last lesson.

1. Open the claim you just created (the windshield claim).
2. How many activities were created during the claim intake process?
3. Mark the Make initial contact activity as complete.

- 4. Open the accident claim (the claim you created with two vehicles involved).**
- 5. How many activities were created during the claim intake process?**
- 6. Mark the Make initial contact activity as complete.**
- 7. Create a Request activity to get the initial medical report for Michael Cashman. Add an appropriate description and set the escalation date to one week from today.**

## 6.4 Solution: Examine the Workplan



### Solution

- 1. Open the claim you just created (the windshield claim).**

- 2. How many activities were created during the claim intake process?**

*2 – Make initial contact with insured; Initial 30 day file review (Tip: If this answer does not match yours, you did not remove the automatically created exposure in the last step of the New Claim wizard).*

- 3. Mark the Make initial contact activity as complete.**

*Either click the Subject value and then click Complete in the worksheet below OR*

*Select the checkbox on the Make initial contact line and click Complete.*

- 4. Open the accident claim (the claim you created with two vehicles involved).**

- 5. How many activities were created during the claim intake process?**

*3 – Make initial contact with insured; Get vehicle inspected; Initial 30 day file review*

- 6. Mark the Make initial contact activity as complete.**

*Either click the Subject value and then click Complete in the worksheet below OR*

*Select the checkbox on the Make initial contact line and click Complete.*

- 7. Create a Request activity to get the initial medical report for Michael Cashman. Add an appropriate description and set the escalation date to one week from today.**

*Click Actions → New Activity Request → Get initial medical report.*

ClaimCenter™ Desktop | Claim (000-00-000212) | Search | Address Book | Vacation

**Actions**

- New ...**
- Note
- Email
- Matter
- Evaluation
- Negotiation
- Service
- New Transaction**
- Reserve
- Check
- Other
- New Exposure**
- Create by Coverage Type
- Choose by Coverage
- Claim Actions**
- Assign Claim
- New Document**
- Create from a template
- Upload Documents
- Indicate existence of a document
- Exposures**
- Parties Involved**
- Policy**
- Financials**

**New Activity**

18 Adj: Sam Tudent99 (Training Group 99)

Subject	Exposures
Correspondence	
Interview	
New Mail	
Reminder	
Request	Additional living expenses required
Warning	Create Recovery email bill1 Create Recovery email bill2
<b>New Exposure</b>	
Choose by Coverage Type	Get accident scene inspected
Choose by Coverage	Get claimant medical reports
<b>Claim Actions</b>	Get independent medical examination
Assign Claim	Get initial medical report
<b>New Document</b>	Get list of damaged items
Create from a template	Get police report
Upload Documents	Get property inspected
Indicate existence of a document	Get quote for repairs/replacement
	Get vehicle inspected
	Independent appraisal

### New Activity in Claim 000-00-000212

Subject	<input type="text" value="* Get initial medical report"/>
Description	<input type="text" value="This report is for the Michael Cashman injury"/>
Related To	<input type="text" value="* Claim"/>
Due Date	<input type="text" value="08/27/2018"/> <input type="button" value=""/>
Escalation Date	<input type="text" value="08/28/2018"/> <input type="button" value=""/>
Priority	<input type="text" value="* Normal"/>
Mandatory	<input type="text" value="Yes"/>
Calendar Importance	<input type="text" value="* Not On Calendar"/>
Recurring	<input type="text" value="No"/>
Externally Owned	<input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<input type="text" value="&lt;none&gt;"/> <input type="button" value=""/>
Document Template	<input type="text"/> <input type="button" value=""/> <input type="button" value=""/>
Email Template	<input type="text"/> <input type="button" value=""/> <input type="button" value=""/>
Assign To	<input type="text" value="* Use automated assignment"/> <input type="button" value=""/>

## Workplan

All open activities					
	Due	Priority	Status	Subject	Exposures
<input type="checkbox"/>	☆	08/27/2018	Normal	Open	Get initial medical report
<input type="checkbox"/>	☆	08/27/2018	Normal	Open	Get vehicle inspected (1) 1st Party Vehicle - Kevin Smith99
<input type="checkbox"/>	☆	09/19/2018	Normal	Open	Initial 30 day file review

## 6.5 Exercise: Validation



### Activity

1. Examine the claim you created with two vehicles involved.
2. What is the validation (maturity) level of the claim?
3. Check the validation level of the claim and exposures for New loss completion. Are there any errors?
4. Check the validation level of the claim and exposures for Ability to pay. Are there any errors?
5. If there are any errors, correct them.
6. Clear the validation error in the worksheet.
7. Revalidate the claim and exposures for Ability to pay.

## 6.6 Solution: Validation



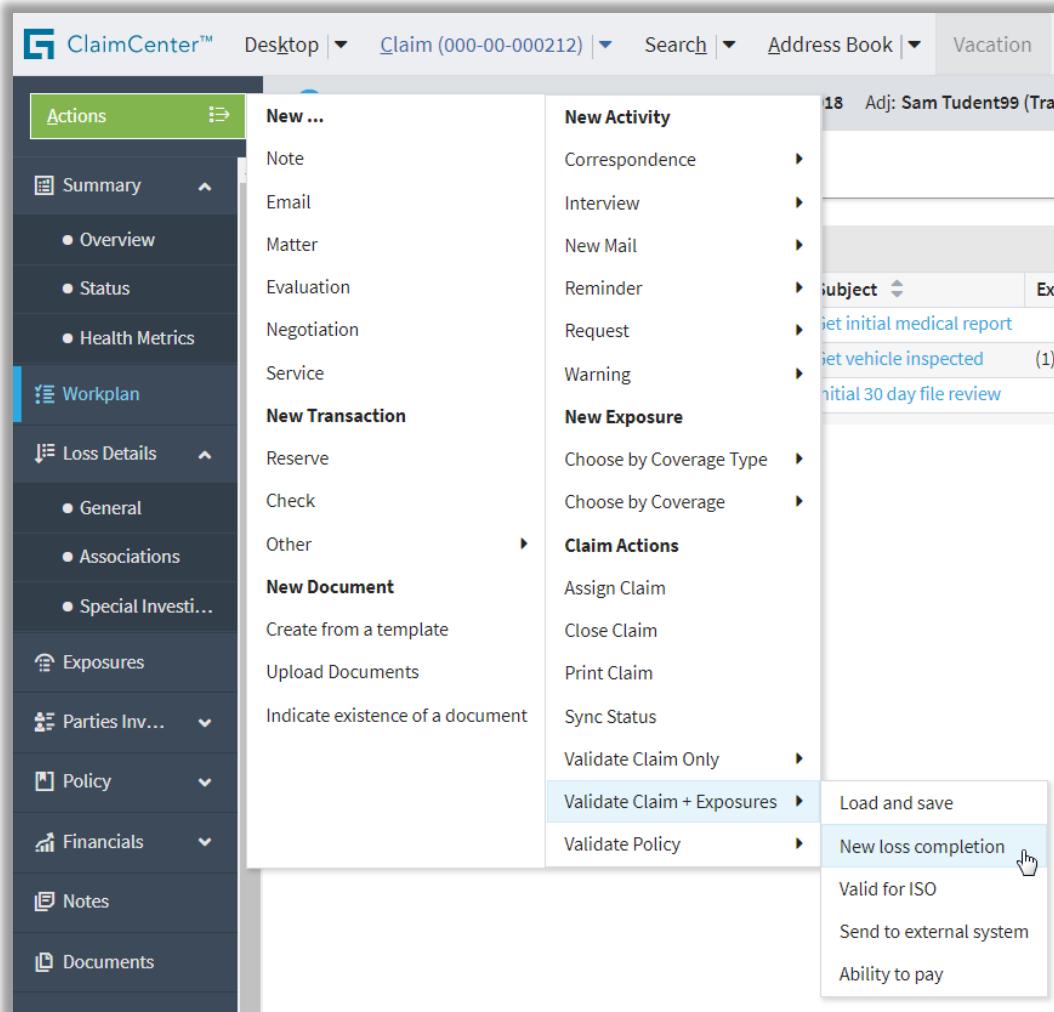
### Solution

1. Examine the claim you created with two vehicles involved.
2. What is the validation (maturity) level of the claim?

*Ability to pay*

**3. Check the validation level of the claim and exposures for New loss completion. Are there any errors?**

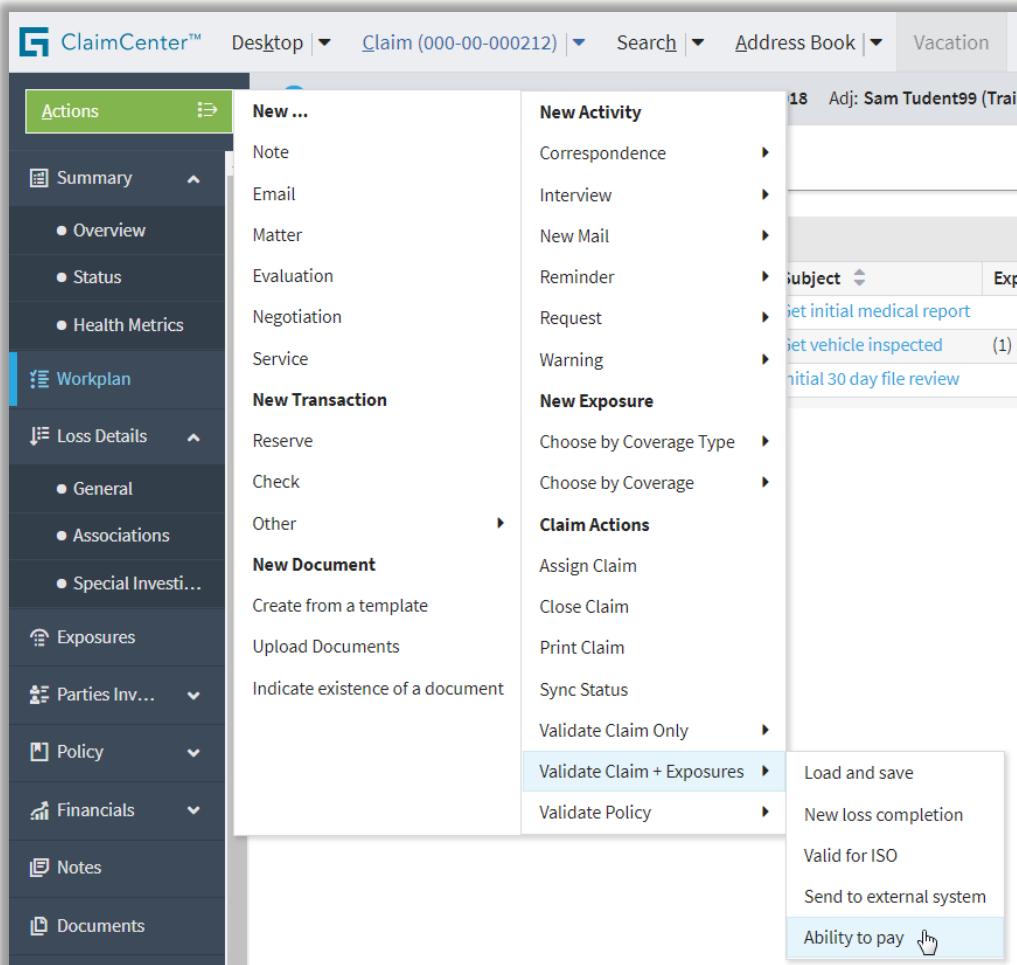
No



The screenshot shows the ClaimCenter software interface. The top navigation bar includes 'ClaimCenter™', 'Desktop |', 'Claim (000-00-000212) |', 'Search |', 'Address Book |', and 'Vacation'. The left sidebar contains sections like 'Summary', 'Workplan', 'Loss Details', 'Exposures', 'Parties Inv...', 'Policy', 'Financials', 'Notes', and 'Documents'. The main area has a 'Actions' button at the top left. A dropdown menu titled 'Actions' is open, showing several categories: 'New ...', 'New Activity', 'New Transaction', 'New Exposure', 'Claim Actions', 'New Document', and 'Claim Details'. Under 'New Transaction', 'New Activity', and 'Claim Actions', there are sub-options like 'Correspondence', 'Interview', 'New Mail', etc. Under 'New Document', options include 'Create from a template', 'Upload Documents', and 'Indicate existence of a document'. The 'Validate Claim + Exposures' option under 'Claim Actions' is highlighted with a blue border. A tooltip for this option shows the steps: 'Load and save', 'New loss completion' (with a cursor icon), 'Valid for ISO', 'Send to external system', and 'Ability to pay'.

**4. Check the validation level of the claim and exposures for Ability to pay. Are there any errors?**

Yes



The screenshot shows the 'Validation Results' page. At the top, there is a red header bar with the title 'Validation Results'. Below it, a green button labeled 'Clear' is visible. A message box displays an error: 'Errors located on another page: (1) 1st Party Vehicle - Kevin Smith99' with a warning icon. The error details are: 'Vehicle incident description must not be empty'.

**5. If there are any errors, correct them.**

(1) 1st Party Vehicle - Kevin Smith99

[Edit](#) [Assign](#) [Close Exposure](#) [Create Reserve](#) [Send To ISO](#)

Details		Total Loss Calculator	ISO
<b>Exposure</b>			
Loss Party	Insured's loss		
Primary Coverage	Collision		
Coverage Subtype	Collision		
Coverage	2004 Honda Civic (1JXZ199 / Illinois)		
Adjuster	Sam Tudent99		
Group	Training Group 99		
Status	Open		
Created Via	Business Rule		
Create Date	08/20/2018		
Validation Level	New loss completion		
<b>Claimant</b>			
Claimant	Kevin Smith99		

<b>Claimant</b>	Future Payments
Claimant	Total Paid
Type	Total Recoveries
Contact Prohibited?	Net Total Incurred
Primary Phone	<b>Deductible</b>
Address	Waived
<b>Incident Overview</b>	
Vehicle	Amount
Driver	Amount Applied
Description	Amount Remaining
Operable?	New Incident...
	<a href="#">Edit Incident Details...</a>

**Damage Description**

Front right fender damaged.

**Details**

Was the vehicle parked?  Yes  No

Loss Occurred? \*  In transit

Airbags Deployed?  Yes  No

Equipment Failure?  Yes  No

Operable?  Yes  No

Total Loss?  Yes  No

Loss Estimate

**Collision**

Was there a collision?  Yes  No

**Theft**

Was the vehicle stolen?  Yes  No

- 6. Clear the validation error in the worksheet.**
- 7. Revalidate the claim and exposures for Ability to pay.**