

# 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



### Solution

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 #  SSN or Tax ID

First name  Country

Last name  City

Organization Name  State

Policy Type  ZIP Code

Loss Date  VIN

	Policy #	Insured	Address	City	State	ZIP Code	Effective	Expires	Type
<input type="button" value="Unselect"/>	123456-99	Kevin Smith99	1024 Glenwood Avenue	Waukegan	Illinois	60085	05/09/2018	05/08/2019	Personal Auto

New Claim

Loss Date \*

Time

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 entered the intersection and hit a car traveling west.

## Step 2 of 5: Basic information

### Reported By

How Reported

Name \*

Relation to Insured \*

Date of Notice

### Verify Date of Birth

Date of Birth

### Confirm Contact Info

Address

Work Phone

Home Phone

Mobile

Primary Phone

Email

### Insured

Name

Address

Primary Phone

### Main Contact

Same Person? ☒ Same as reporter  
☐ Different person

### Involved Vehicle(s)

☐ 2002 Mini Cooper (4FRT299 / Illinois)

☒ 2004 Honda Civic (1JXZ199 / Illinois)

Collision \$500.00 Deductible; \$15,000.00 Limit  
Comprehensive \$500.00 Deductible; \$10,000.00 Limit

## Step 3 of 5: Add claim information

What Happened?

Loss Date

Loss Cause \*

Incident Only? ☐

Location \*

Country

Address 1

Address 2

Address 3

City \*

County

State \*

ZIP Code

Location Description

Location Code

Jurisdiction

### Vehicles, People, & Property

Step 5 of 5: Save and Assign Claim

**Assignment**

☒ Assign claim and all exposures to: \* Sam Tudent99 (Training Group 99)

☐ Assign Claim and Exposures Individually

Claim Assignment:

**Exposures**

	#	Type	Coverage	Claimant	Involving	Status	Created Via
<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**

- Summary
  - Overview
  - Status
  - Health Metrics
- Workplan
- Loss Details
  - General
  - Associations
  - Special Investi...
- Exposures
- Parties Inv...
- Policy
- Financials

**New ...**

- Note
- Email
- Matter
- Evaluation
- Negotiation
- Service

**New Transaction**

- Reserve
- Check
- Other

**New Document**

- Create from a template
- Upload Documents
- Indicate existence of a document

**New Activity**

- Correspondence
- Interview
- New Mail
- Reminder
- Request
- Warning

**New Exposure**

- Choose by Coverage Type
- Choose by Coverage

**Claim Actions**

- Assign Claim
- Close Claim
- Print Claim
- Sync Status
- Validate Claim Only
- Validate Claim + Exposures
- Validate Policy

**Subject**

- Additional living expenses required
- Create Recovery email bill1
- Create Recovery email bill2
- Get accident scene inspected
- Get claimant medical reports
- Get independent medical examination
- Get initial medical report
- Get list of damaged items
- Get police report
- Get property inspected
- Get quote for repairs/replacement
- Get vehicle inspected
- Independent appraisal

18 Adj: Sam Tudent99 (Training Group 99)

## New Activity in Claim 000-00-000212

Subject \* Get initial medical report

Description This report is for the Michael Cashman injury

Related To \* Claim

Due Date 08/27/2018

Escalation Date 08/28/2018

Priority \* Normal

Mandatory Yes

Calendar Importance \* Not On Calendar

Recurring No

Externally Owned \* ☐ Yes ☒ No

External Owner <none>

Document Template

Email Template

Assign To \* Use automated assignment

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

## 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



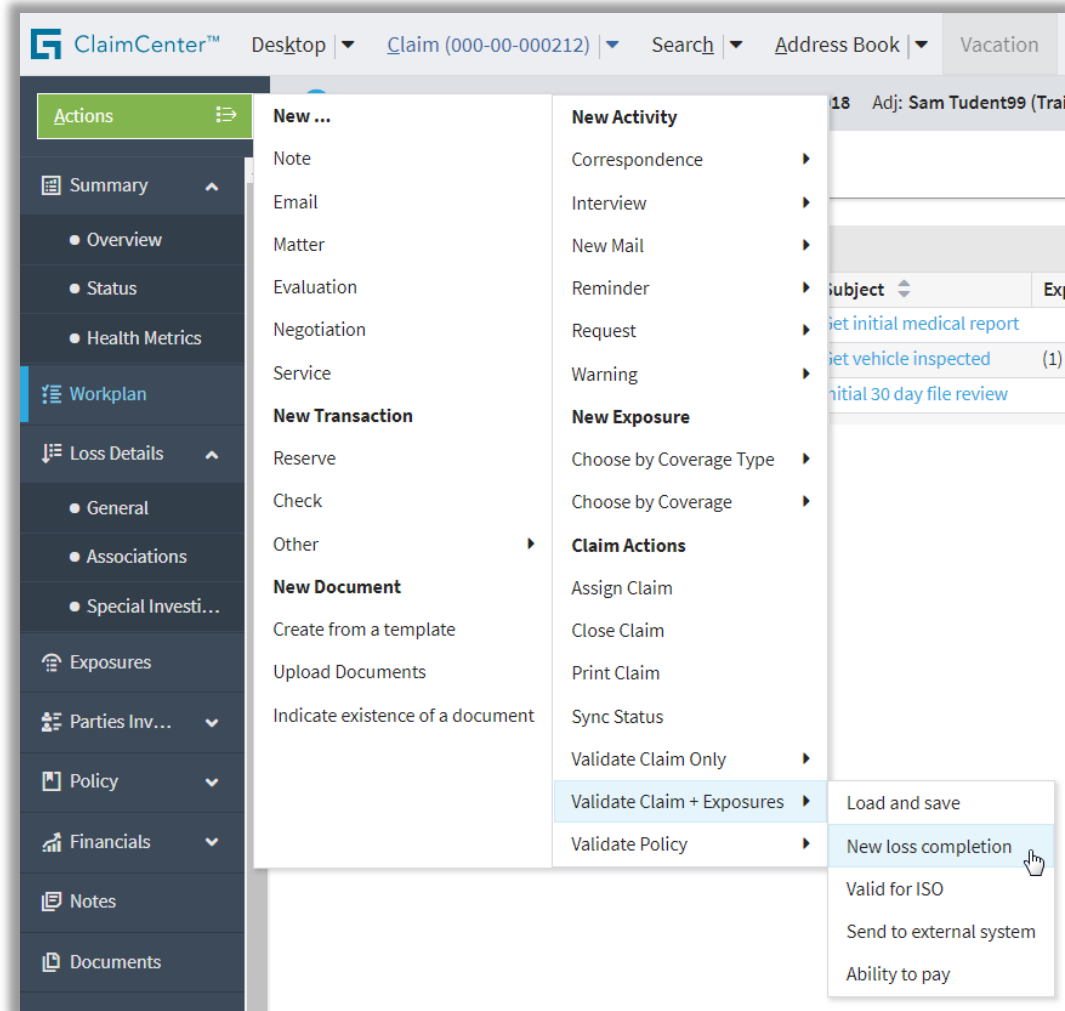
### Solution

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?

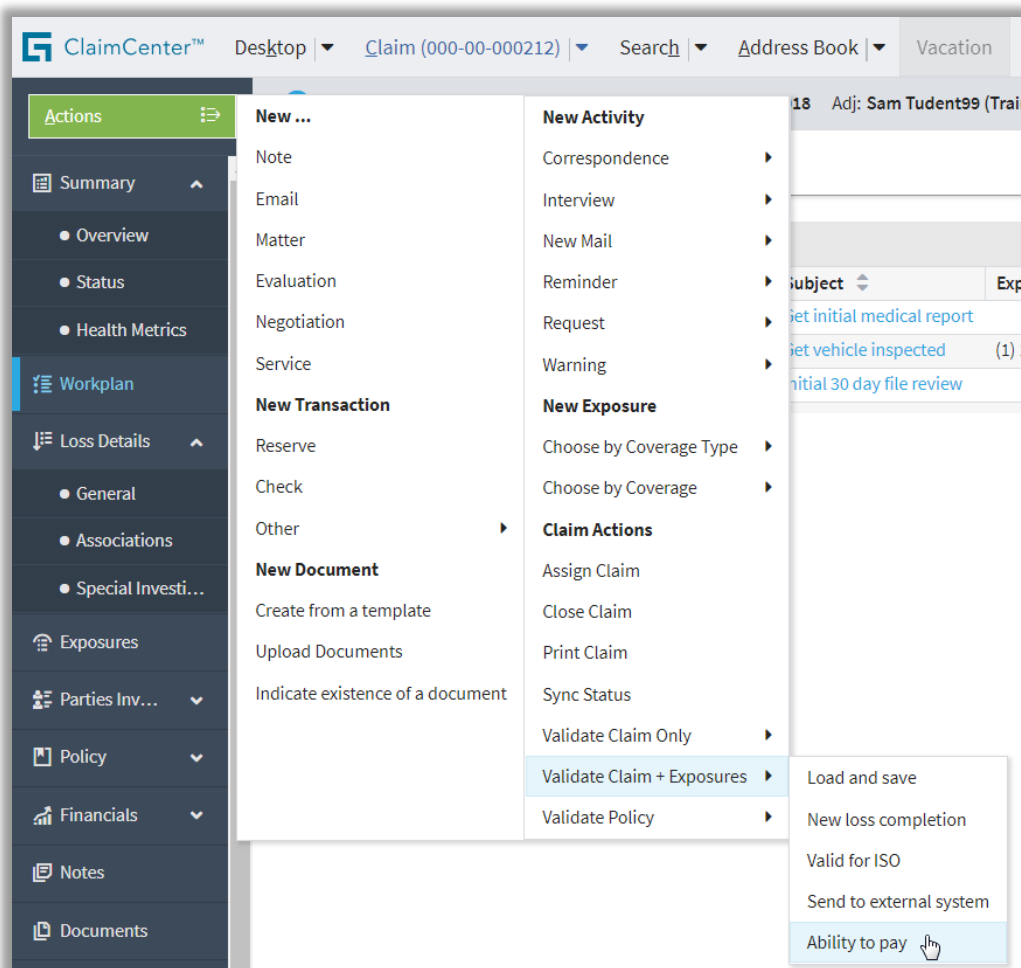
No



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

Yes





5. If there are any errors, correct them.

### (1) 1st Party Vehicle - Kevin Smith99

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

[Details](#) [Total Loss Calculator](#) [ISO](#)

**Exposure**

Loss Party	Insured's loss
Primary Coverage	Collision
Coverage Subtype	Collision
Coverage	2004 Honda Civic (1JXZ199 / Illinois)
Adjuster	<a href="#">Sam Tudent99</a>
Group	Training Group 99
Status	Open
Created Via	Business Rule
Create Date	08/20/2018
Validation Level	New loss completion

**Claimant**

Claimant	<a href="#">Kevin Smith99</a>
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**Claimant**

Claimant	* <a href="#">Kevin Smith99</a>
Type	* <a href="#">Insured</a>
Contact Prohibited?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Primary Phone	312-336-6210
Address	1024 Glenwood Avenue, Waukegan, IL 60085

**Incident Overview**

Vehicle	* <a href="#">2004 Honda Civic (1JXZ199 / Illinois)</a>
Driver	Kevin Smith99
Description	
Operable?	

[New Incident...](#)  
[Edit Incident Details...](#)

**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.**