Lesson 8   Business Activity Rules

Succeed Insurance wants all claims resulting from the 2003 Los Angeles (LA) earthquake to be attributed to that catastrophe recorded in ClaimCenter.

They want to assign inspection activities to a special field adjusters group named "LA Property Adjusters" for all activity related to the 2003 earthquake.

Succeed has an existing activity pattern for inspection activities named Get property inspected which they want to use for any catastrophe-based activity rules.

There should be only one activity created for each claim.

The new activities should only apply to Property losses in California with policy types of Commercial Property, Farmowners, or Homeowners.

The activity completion target is three (3) days and should be escalated if it is not complete within five (5) days.

Prerequisites

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

ClaimCenter Server should be running when you start the exercise.

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

Log in to ClaimCenter as Ursula Seradmin to create the rule. The login/password is `useradmin/gw`.

For testing, you will log in to ClaimCenter as aapplegate. The login/password for aapplegate is `aapplegate/gw`.

8.1   Catastrophe rule

Exercise

Determine the specifics needed for creating a business activity rule.

Exercise 1: Exercise: Catastrophe rule

1. **Create the rule.**

    a) Log in to ClaimCenter as Ursula Seradmin (**useradmin/gw**).

    b) Create a business activity rule called **LA Earthquake** that triggers on the creation or update of a claim.

    c) The rule should apply to Property losses for Commercial Property, Farmowners, or Homeowners policy types in California.

2. **Set the Rule Condition.**

   a) What rule condition is called for in the requirements?

   b) Set the condition in the Rule Condition table.

   ### Hints

   How can I check this condition?

Some Gosu features that might be useful:

- Claim has a Catastrophe property, and the Catastrophe has a Name property.
- The name of the catastrophe in ClaimCenter is "LA earthquake".

3. **Set the Rule Action**

   a) What is the rule supposed to do?

   b) Add an action that accomplishes this.

   c) Make sure that the new activity is assigned to the LA Property Adjusters group.

   d) Change the Target Date Days to 3 and the Escalation Date Days to 5 to reflect the urgency of this activity.

   e) Make sure this rule will create only one activity on this claim.

4. **Log out of ClaimCenter as useradmin and log in as aapplegate/gw.**

Test procedure

1. **Using the New Claim Wizard, create a new claim that will test the activity rule you just created.**

   a) Search for a policy for "Worthy Farmer's Supply.

   b) The Loss Date must be between 09/06/2003 and 09/11/2003, resulting in a "Coverage in Question" flag. This is OK for this test.

   c) Select either policy property.

   d) Jim Caron is an employee reporting the claim.

   e) If there are duplicate claims, you can close the warning worksheet and ignore them.

   f) The Loss Cause should be Earthquake and the Catastrophe should be the LA earthquake.

   g) The Loss Location can either of the Greens Road properties.

   h) Assign the claim to yourself (**aapplegate**) and create the claim.

2. **In the sidebar, click Workplan.**

   a) Verify that the activity has been created.

   b) Verify that it has been assigned to the LA Property Adjusters group.

Stop

8.2   Solution

Solution 1: Catastrophe rule

Applies To

Loss Type ○ All ● Selected

Auto	Property
Liability	
Travel	
Workers' Comp	

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Policy Type ○ All ● Selected

Businessowners	Commercial Property
Commercial Auto	Farmowners
Commercial Package	Homeowners
General Liability	

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Claim Jurisdiction ○ All ● Selected

A.C.T.	California
Alabama	
Alaska	
Alberta	

〉 〈

Rule Variables

Add Remove

Name	Description	Expression	Type
	No data to display		

Rule Condition

Display Rule Conditions　　　　● Yes　○ No

* ○ None
● All of the following criteria must be true (AND)
○ At least one of the following criteria must be true (OR)
○ The following combination of criteria must evaluate to true (AND/OR)

Add Insert Remove ↑ ↓ **Hide Formatted View** | **Context Help (ALT-H)**

Left Expression	Operation	Right Expression
☐ claim.Catastrophe.Name ▼	= ▼	"LA earthquake" ▼

claim.Catastrophe.Name = "LA earthquake"

Actions

	Sequence	Action Type	Description
☐	1	Generate Activity	Activity Pattern : property_inspection

Parameters

Action Type: Generate Activity

Activity

Activity Pattern	Get property inspected
Related To	Claim
Assigned To	Group
Group	LA Property Adjusters
Additional Restriction	No duplicate Activity on Claim
Priority	Normal
Calendar Importance	Not On Calendar
Subject (Text)	Get property inspected
Description (Text)	Inspect property affected by the LA Earthquake

Target Date

Days (Formula)	3
Hours (Formula)	0
Start Point	Activity creation date
Include Days	Business days

Test procedure

Workplan

All open activities

	☆	▤	Due	Priority	Status	Subject
☐	☆		10/25/2018	Urgent	Open	Make initial contact with insured
☐	☆		10/26/2018	High	Open	Review coverage in question
☐			10/29/2018	Normal	Open	Get property inspected
☐	☆		11/23/2018	Normal	Open	Initial 30 day file review

Activity

Activity Detail for Claim 000-00-000503

[Assign] | [View Notes] | [Close Worksheet]

Details

Subject	Get property inspected
Description	Inspect property affected by the LA Earthquake
Related To	Claim
Due Date	10/29/2018
Escalation Date	11/14/2018
Priority	Normal
Calendar Importance	Not On Calendar
Mandatory	No
Status	Open
Externally Owned	No
External Owner	

Activity Assignment

Assigned To	James Dole
Assigned Group	LA Property Adjusters
Assigned By	Andy Applegate
Assign Date	10/24/2018

Documents

Name	Actions	Document Type	Status	Author	Uploaded
		No data to display			

Activity Tracking

Completion/Skipped date	
Completed by	
Recurring	No