Lesson 8 Configuring Claim Contacts

A given claim may have many associated contacts (persons and companies).

ClaimCenter has a rich contact model that helps agents and adjusters keep track of the roles each contact plays with respect to a given claim.

8.1 Adding a claim contact role

Prerequisites

This lesson assumes that you have successfully completed Lesson 2, Writing Gosu Rules.

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

Studio should be running when you start the exercise.

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

ContactManager Server should be running when you start the exercise.

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

You should be logged in to ClaimCenter as su/gw.

Some of Succeed Insurance’s customers are not fluent in English. During claim negotiations, Succeed provides the services of an interpreter as needed.

The Interpreter’s name should be displayed in the Negotiation Details, just below the Negotiation Contact.

Exercise

Exercise 1: Adding a claim contact role

1. **Determine the name of the detail view where the interpreter field should appear.**

2. **Create a display key that displays the word “Interpreter”.**

3. **Add typecodes to the ContactRole and ContactRoleCategory typelists to implement the role.**

   Remember to use the "_SI" suffix.

4. **Add the typecode to entityroleconstraints-config.xml.**

   Interpreters are persons and vendors, associated only with Negotiations. There can only be one interpreter per negotiation.

5. **In Studio, open the detail view discovered in Step 1.**

6. **Create a Claim Contact Input to display the negotiator's name.**

Test procedure

1. **Start (or restart) the ClaimCenter server.**

   a) If necessary, log out of ClaimCenter first.

   b) When the server has started, log in as **aapplegate/gw**.

2. **Create a negotiation.**

   a) Navigate to claim **235-53-365870** (the Ray Newton claim).

   b) Select Plan of **Action → Negotiations**

   c) Click New Negotiation.

   d) In the **Name** field, enter **Test Negotiation**.

3. **Verify that you can add an Interpreter.**

   a) Select **Parties Involved → Contacts**.

   b) Select **New Contact → Vendor → Doctor**.

(Note: In a full implementation, an Interpreter would be assigned to a new category under Vendor. Since the Interpreter must be a PersonVendor, you must select Doctor.)

   c) In the **Last Name** field, enter **Bancroft**.

   d) Provide Bancroft with a legitimate **TaxID**.

   e) In the **Roles** list, click **Add**.

   f) Try to add the Interpreter role. Can you?

   g) In the Related To column, select **Test Negotiation**.

   h) Can you add the Interpreter role now?

   i) Click **Update**.

4. **Verify that there can only be one Interpreter on a Negotiation.**

   a) Select **New Contact → Vendor → Doctor**.

j) In the **Last Name** field, enter **Duke**.

k) In the **Roles** list, click Add.

l) In the **Related To** column, select **Test Negotiation**.

m) Can you add the Interpreter role?

n) Click **Update**. What happens?

o) Click Cancel.

5. **Verify the claim contact widget.**

a) Select **Plan of Action Negotiations**.

p) Click **Test Negotiation**.

q) Does the Interpreter field appear?

r) Does Bancroft appear in the Interpreter field?

8.2 Solution

Solution 1: Adding a claim contact role

1. **Determine the name of the detail view where the interpreter field should appear.**

ClaimNegotiationDetailsDV.pcf (open the view in ClaimCenter and click Alt+Shift+I to open the Location Info window).

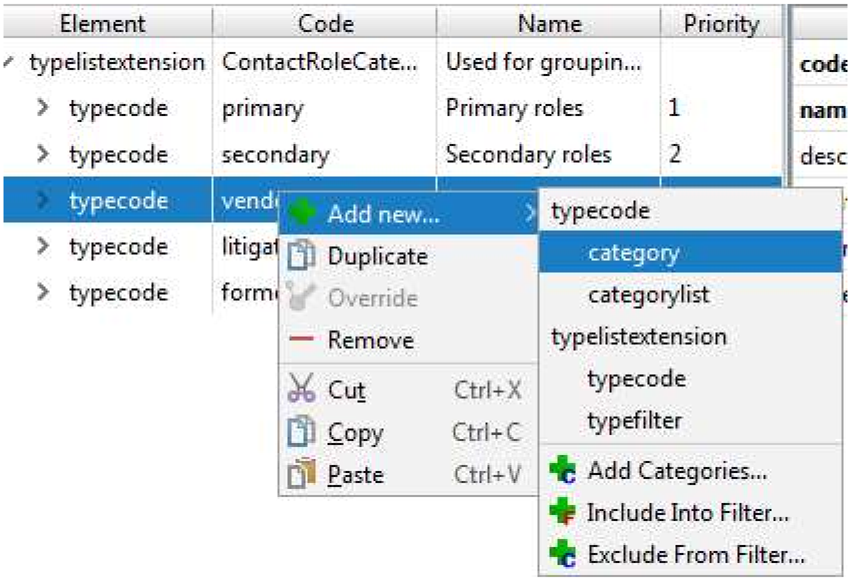
2. **Create a display key that displays the word "Interpreter".**

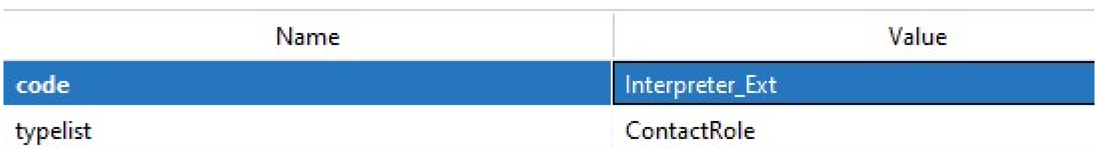
```
Ext_Negotiation.Interpreter = Interpreter
```

3. **Add typecodes to the ContactRole and ContactRoleCategory typelists to implement the role.**

Remember to use the "_Ext" suffix.

Name	Value
code	Interpreter_Ext
name	Interpreter
desc	Interpreter
identifierCode	
priority	*-1*
retired	*false*





4. **Add the typecode to entityroleconstraints-config.xml.**

Interpreters are persons and vendors, associated only with Negotiations. There can only be one interpreter per negotiation.

```
<ContactRoleTypeConstraint contactRoleCode="Interpreter_Ext" contactSubtype="PersonVendor"/>
```

```
<RoleRef
  contactRoleCode="Interpreter_Ext">
  <RoleConstraint
    constraintType="Exclusive"/>
</RoleRef>
```

5. **In Studio, open the detail view you discovered in Step 1.**

6. **Create a Claim Contact Input to display the negotiator's name.**

Claim Contact Input

Basic properties	
claim*	Negotiation.Claim
editable	true
id*	Interpreter_Ext
label	DisplayKey.get("Ext_Negotiation.Interpreter")
required	false
value*	Negotiation.Interpreter_Ext
valueRange*	Negotiation.Claim.RelatedPersonVendorArray
validationExpression	
valueType	entity.PersonVendor
visible	

Test procedure

1. **Start (or restart) the ClaimCenter server.**

a) If necessary, log out of ClaimCenter first.

s) When the server has started, log in as **aapplegate/gw**.

2. **Create a negotiation.**

a) Navigate to claim **235-53-365870** (the Ray Newton claim).

t) Select **Plan of Action Negotiations**

u) Click **New Negotiation.**

v) In the **Name** field, enter **Test Negotiation**.

w) Click Update.

3. **Verify that you can add an Interpreter.**

a) Select **Parties Involved Contacts**.

x) Select **New Contact Vendor Doctor**.

(Note: In a full implementation, an Interpreter would be assigned to a new category under Vendor. Because Interpreter must be a PersonVendor, you must select Doctor.)

y) In the **Last Name** field, enter **Bancroft**.

z) Provide Bancroft with a legitimate **TaxID**.

aa) In the Roles list, click **Add**. Try to add the Interpreter role. Can you?

No.

bb) In the Related To column, select Test Negotiation.

cc) Can you add the Interpreter role now?

Yes.

dd) Click **Update**.

	Name	Roles
☐	Bancroft	Intepreter

4. **Verify that there can only be one Interpreter on a Negotiation.**

a) Select **New Contact Vendor Doctor**.

b) In the **Last Name** field, enter **Duke**.

c) In the **Roles** list, click **Add**.

d) In the **Related To** column, select **Test Negotiation**.

e) Can you add the Interpreter role?

Yes.

f) Click **Update**. What happens?

An error message is displayed saying that you cannot add Interpreter to this Contact because another Contact already has that role.

g) Click **Cancel**.

5. **Verify the claim contact widget.**

a) Select Plan of Action Negotiations.

h) Click Test Negotiation.

i) Does the Interpreter field appear?

Yes.

j) Does Bancroft appear in the Interpreter field?

Yes.