

Lesson 5 Claim Intake

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>.

5.1 Exercise: Claim intake investigation



Activity

In this exercise, you will answer questions about the claim intake process.

For each of the lists below, circle the one item that does NOT belong in the list.

1. Incidents that could be on a claim:

- a) A property
- b) A third-party liability coverage
- c) A vehicle
- d) An injury suffered by an individual

2. Information typically gathered about the loss during claim intake:

- a) Details about the item that was damaged or lost
- b) Details about the loss event itself
- c) The amount for the checks to be issued
- d) The policy which covers the loss
- e) The people involved in the loss

3. Tasks accomplished by business rules during automated claim setup:

- a) Assignment of the activities for the claim
- b) Assignment of the claim
- c) Creation of the activities for the claim
- d) Creation of the incidents for the claim
- e) Segmentation of the claim

4. Ways in which a First Notice of Loss is entered into ClaimCenter:

- a) Manually by a ClaimCenter user

- b) Through an integration point with an FNOL system
- c) Through an integration point with the Policy Administration system

5.2 Solution: Claim intake investigation



- 1. Incidents that could be on a claim:**
 - a) A property
 - b) *A third-party liability coverage*
 - c) A vehicle
 - d) An injury suffered by an individual
- 2. Information typically gathered about the loss during claim intake:**
 - a) Details about the item that was damaged or lost
 - b) Details about the loss event itself
 - c) *The amount for the checks to be issued*
 - d) The policy which covers the loss
 - e) The people involved in the loss
- 3. Tasks accomplished by business rules during automated claim setup:**
 - a) Assignment of the activities for the claim
 - b) Assignment of the claim
 - c) Creation of the activities for the claim
 - d) *Creation of the incidents for the claim*
 - e) Segmentation of the claim
- 4. Ways in which a First Notice of Loss is entered into ClaimCenter:**
 - a) Manually by a ClaimCenter user
 - b) Through an integration point with an FNOL system
 - c) *Through an integration point with the Policy Administration system*

5.3 Exercise: Claim intake

In this exercise, you create a claim for an individual who has a policy with Succeed Insurance.

Note: Your instructor will assign you a two-digit number. Whenever you see an italicized "XX" in the exercise instructions, replace the "XX" with your two-digit number. For example, if your two-digit number is *07*, then when you see an instruction to search for "*Kevin SmithXX*", you should search for "*Kevin Smith07*".



Activity

1. Log on to ClaimCenter as studentXX with a password of "gw".
2. What is the name of the user with user ID studentXX? _____
3. The transcript that follows 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 full new claim wizard (not the quick claim wizard).

In creating this claim:

- Assume that the phone call was received on the same day that you are doing this exercise.
- Do not create any exposures or services for the claim.
- Create vehicle incidents for every damaged vehicle and detail the driver of the vehicles.
- Do not enter a damage description for Kevin Smith's car.
- Create injury incidents for every injury.
- 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.

Note: Be sure to capture the address information provided for all claimants. If this is not possible on the ordered steps of the wizard, navigate to the screen in the independent steps that includes the address fields.

Transcript

Hello. My name is Kevin SmithXX. My policy number is 123456-XX. I was involved in an accident yesterday and I want to report it.

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 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.

The accident occurred at the intersection of McAree Road and Grand Avenue in Waukegan, Illinois. I was driving my Honda Civic on Grand Avenue traveling north. I was trying to make it through a yellow light, but I couldn't. I hit the brakes, but there was oil on the road. I skidded into the intersection and hit a car traveling west on McAree.

The other vehicle was a 2002 Ford Fiesta with a Michigan license plate of 223RFT. It was driven by Michael CashmanXX. He lives at 713 Leith Avenue, Waukegan, Illinois, 60087. His cell phone number is (312) 343-2909.

The left side of the other car is fairly smashed up, including damage to the driver-side door.

Mr. CashmanXX also hit his head against the steering wheel. He was taken to the hospital and diagnosed with a minor concussion.

Yes, my car will need servicing by an auto body repair shop, but I'm not sure which shop I'll be taking it to. I will let you know later. I don't need any services right now.

5.4 Solution: Claim intake



1. Log on to ClaimCenter as studentXX with a password of "gw".

2. What is the name of the user with user ID studentXX?

Sam TudentXX

3. Screenshots from entering the claim based on the transcript:

Pol: 123456-99 Ins: Kevin Smith99 Dol: 08/19/2018

Step 2 of 5: Basic information

Reported By

How Reported: Phone

Name: * Kevin Smith99

Relation to Insured: Self/Insured

Date of Notice: 08/20/2018

Verify Date of Birth

Date of Birth

Confirm Contact Info

Address: 1024 Glenwood Avenue, Waukegan, IL 60085

Work Phone

Home Phone: 312-336-6210

Mobile: 650-333-3333

Primary Phone: Home

Email: KJSmith@kmail.com

Edit Contact

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

Insured

Name: Kevin Smith99

Address: 1024 Glenwood Avenue, Waukegan, IL 60085

Primary Phone: 312-336-6210

Cancel | Back | Next

Step 3 of 5: Add claim information

[Cancel](#) [Back](#) [Next](#) [Finish](#)

What Happened?	I was trying to make it through a yellow light, but I couldn't. I hit the brakes, but there was oil on the road. I skidded into the intersection and hit a	Location	* New...
Loss Date	08/19/2018 12:01 AM	Country	United States
Loss Cause	* Collision with motor vehicle	Address 1	McAree Road and Grand Avenue
Incident Only?	<input type="checkbox"/>	Address 2	
		Address 3	
		City	* Waukegan
		County	
		State	* Illinois
		ZIP Code	#####-####
		Location Description	
		Location Code	
		Jurisdiction	Illinois

Vehicles, People, & Property

[Add Vehicle](#) [Add Pedestrian](#) [Add Property Damage](#)

2004 Honda Civic	<input type="button" value="▼"/>
Illinois	
1JXZ199	
Occupants	
Kevin Smith99	
2002 Ford Fiesta	<input type="button" value="▼"/>
Michigan	
223RFT	
Left side fairly smashed up, including damage to the driver-side door.	
Occupants	
Michael Cashman	

Pol: 123456-99 Ins: Kevin Smith99 DoL: 08/19/2018

Step 4 of 5: Services

Involved Vehicles

The services will be requested when the wizard is completed.

2004 Honda Civic	<input type="checkbox"/> Rental (No Coverage) <input type="checkbox"/> Towing (No Coverage) <input type="checkbox"/> Appraisal <input type="checkbox"/> Auto Body Repair <input type="checkbox"/> Other Services
2002 Ford Fiesta Left side fairly smashed up, including damage to the driver-side door.	<input type="checkbox"/> Rental (No Coverage) <input type="checkbox"/> Towing (No Coverage) <input type="checkbox"/> Appraisal <input type="checkbox"/> Auto Body Repair <input type="checkbox"/> Other Services

Pol: 123456-99 Ins: Kevin Smith99 DoL: 08/19/2018

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

New Exposure		Remove				
#	Type	Coverage	Claimant	Involving	Status	Created Via
1	Vehicle	Collision	Kevin Smith99	2004 Honda Civic (1JXZ199 / Illinois)	Draft	Business Rule

5.5 Exercise: Claim investigation



Activity

Answer the following questions about the claim you just created.

- 1. How many incidents are there on the claim?**
- 2. How many exposures are there?**
- 3. What is the coverage and coverage subtype of the exposure?**
- 4. What is the Gross Incurred to date?**
- 5. What is the Line of Business?**
- 6. What is the Loss Type?**
- 7. What is the Claim Segment?**
- 8. What team was this claim assigned to?**
- 9. What is the first Activity that is due?**

5.6 Solution: Claim investigation



- 1. How many incidents are there on the claim?**
3 (Ford, Honda, Michael Cashman)
- 2. How many exposures are there?**
1 (vehicle)
- 3. What is the coverage and coverage subtype of the exposure?**
Collision, collision
- 4. What is the Gross Incurred to date?**
\$3,000
- 5. What is the Line of Business?**
Personal Auto Line

6. What is the Loss Type?

Auto

7. What is the Claim Segment?

Auto - mid complexity

8. What team was this claim assigned to?

Training Group XX

9. What is the first Activity that is due?

Make initial contact with insured