

## Lesson 5 Writing Assignment Rules

A big part of an efficient and effective claims process is making sure the right work gets to the right people at the right time.

Assignment rules, a type of Gosu rules, help you ensure that Claims, Exposures, Activities, Matters, Service Requests and Subrogations are routed to the correct worker promptly.

### 5.1 Assigning auto theft claims by location

Succeed Insurance has two groups which handle auto claims in which the entire car was stolen. Succeed Insurance wants complex theft claims to go to either Complex Thefts - West and Complex Thefts - East, depending on the loss location.

Normally, this would probably be done in conjunction with segmentation. A segmentation rule would segment the claim based on loss cause, and the assignment rule would react to the claim's segment. To simplify the exercise, you can write the assignment rule to react directly to the loss cause.

#### Prerequisites

This lesson, like all the lessons in this class, assumes that you have successfully completed the Configuration Fundamentals course.

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

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

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

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



#### Exercise

#### Exercise 1: Assigning auto theft claims by location

##### 1. Import required data.

- a) This requirement implies the existence of the Complex Theft groups and their associated users. Your classroom build includes a file, `config_groups_users.csv`, in the `\admin\bin` directory that you will import.
- b) Open a command window at `C:\Guidewire\ClaimCenter\admin\bin`.
- c) Enter `import_tools.bat -import config_groups_users.csv -password gw`
- d) Wait for the command to finish processing. If there are errors (there should be none), contact your instructor.

## 26. Implement the requirement.

- a) Create a Global Claim Assignment rule that implements this requirement.
- b) The rule should run before other Global Claim Assignment rules.
- c) If it succeeds in making an assignment, no other Global Claim Assignment rules should run.
- d) If the loss location is not known, assign to the Complex Theft groups by round robin.

## Test procedure.

1. **Start (or restart) the ClaimCenter server in debug mode.**
2. **Log on to ClaimCenter as aapplegate/gw.**
3. **Navigate to the Allen Robertson claim and click Loss Details.**
4. **Click Edit.**
5. **Change the Loss Cause dropdown to Theft of entire vehicle.**
6. **Reassign the claim using assignment rules and verify that the claim goes to Complex Thefts - West.**
7. **Modify the claim so that the loss location is in an eastern state, such as New York.**
8. **Reassign the claim using assignment rules and verify that the claim goes to Complex Thefts – East.**



## 5.2 Assigning FNOL error activities to claim creator

When a claim is first created, an "FNOL snapshot" of the claim is taken. This is a read-only record of the information gathered at the time the claim was created. This is useful when important information about the loss changes during adjudication. (For example, a change of loss cause from "collision while turning left" to "collision with auto" might indicate that the insured is trying to hide being at fault.)

Sometimes, information in an FNOL snapshot varies from later information due to human error. When the insured reports that information in the FNOL snapshot was entered inaccurately, Succeed Insurance wants the adjuster to create a "Verify entry of erroneous FNOL information" activity. This activity should be assigned to the person who created the claim.

In the Succeed Insurance Global Activity Assignment rule set, the last rule is a default rule which assigns activities to the issue owner if no other rules have done so. Consequently, every activity which exits the Global Activity Assignment rule set has been assigned to a group and a user.



## Exercise

### Exercise 2: Assigning FNOL error activities to claim

#### 1. Create the needed administrative data.

- Log on to ClaimCenter as **su/gw**.
- Navigate to **Administration** ▢ **Business Settings** ▢ **Activity Patterns**.
- Create a new activity pattern that includes the following criteria:

Subject:	Verify FNOL entry error
Category:	Request
Code:	FNOL_error_Ext
Calendar importance:	High
Target/escalation days	3
Start point	Activity creation date
Include days	Business days
Calendar type	Company Holidays

- Log out of ClaimCenter.
- Stop the ClaimCenter server.

#### 27. Create the rule.

- Create an activity assignment rule that assigns any activity based on the "FNOL\_error\_Ext" pattern to the person who created the claim.
  - Use the claim.CreateUser field.
  - Ensure that the rule fires before any other rules which may assign the activity.
  - If the claim does not have a CreateUser (may occur with imported claims), then assign the activity to the supervisor of the group which currently owns the claim.
  - Use the Global Activity Assignment rule set.

## Test procedure

1. Start the ClaimCenter server in debug mode.
2. Log in as aapplegate/gw.
3. Using the quick claim wizard, create a personal auto claim.
4. Assign the claim to Dan Henson.
5. Log out of ClaimCenter and then log back in as dhenson/gw.
6. Create a "Request" activity on the claim using the "Verify FNOL entry error" activity pattern.
7. Verify that the activity is automatically assigned to Andy Applegate.



**Stop**

## 5.3 Assigning vandalism claims manually

At Succeed Insurance, the adjuster who can best handle an auto vandalism claim depends on several complex factors, such as the type of damage, the state of the vehicle, police department involvement, and so on. Furthermore, the strategy for vandalism assignment changes somewhat over time.

Succeed Insurance has decided to manually assign all auto claims whose loss cause is "Malicious mischief and vandalism".



**Exercise**

### Exercise 3: Assigning vandalism claims manually

1. Create the rule.

Create a claim assignment rule that assigns any claim with an assigned group and a loss cause of "Malicious mischief and vandalism" to the supervisor of that group for manual "pending assignment".

## Test procedure

1. Restart the ClaimCenter server in debug mode.

2. **Log in to ClaimCenter as aapplegate/gw.**
3. **Navigate to any auto claim and change its loss cause to “Malicious mischief and vandalism.”**
4. **Reassign the claim using automated assignment.**
5. **Verify that the Adjuster field in the status bar reads “Pending assignment.”**



**Stop**

## 5.4 Solutions

### Solution 1: Assigning auto theft claims by location

#### 1. Import required data.

- This requirement implies the existence of the Complex Theft groups and their associated users. Your classroom build includes a file, config\_groups\_users.csv, in the \admin\bin directory that you will import.
- Open a command window at C:\Guidewire\ClaimCenter\admin\bin.
- Enter import\_tools.bat -import config\_groups\_users.csv -password gw.
- Wait for the command to finish processing. If there are errors (there should be none), contact your instructor.

```
C:\GW10\ClaimCenter\admin\bin>import_tools.bat -import config_groups_users.csv -password gw
Running import_tools.gsp
Connecting as su to URL http://localhost:8080/cc/ws/gw/wsi/pl/ImportToolsAPI
Importing "config_groups_users.csv"...

Import succeeded
Total time: 20 seconds
Parse time: 0 seconds [78 ms]
Write time: 0 seconds [219 ms]

No errors occurred.
The following entities were imported:
Inserted 4 Group
Inserted 7 Credential
Inserted 1 AssignableQueue
Inserted 7 User
Inserted 7 GroupUser
Inserted 7 UserSettings
Inserted 4 Parentgroup
Inserted 4 GroupRegion
Inserted 7 Contact
Inserted 7 ContactTag
Inserted 4 Visibilityzone
Inserted 7 UserRole
Inserted 8 GroupAssignmentState

done
C:\GW10\ClaimCenter\admin\bin>
```

#### 28. Implement the requirement.

- Create a Global Claim Assignment rule that implements this requirement.
- The rule should run before other Global Claim Assignment rules.
- If it succeeds in making an assignment, no other Global Claim Assignment rules should run.
- If the loss location is not known, assign to the Complex Theft groups by round robin.

The screenshot shows Global Claim Assignment Rule GCA00005 – Auto Theft

USES:

```
CONDITION (claim : entity.Claim):  
return claim.LossType == LossType.TC_AUTO  
    and  
    claim.LossCause == LossCause.TC_THEFTENTIRE  
  
ACTION (claim : entity.Claim, actions : gw.rules.Action):  
if (claim.LossLocation != null) {  
    if (claim.CurrentAssignment.assignGroupByLocation(  
        GroupType.TC_THEFTCOMPLEX, claim.LossLocation,  
        false, null))  
        actions.exit()  
    } else {  
        if (claim.CurrentAssignment.assignGroupByRoundRobin(  
            GroupType.TC_THEFTCOMPLEX, true, null)) {  
            actions.exit()  
        }  
    }  
}  
END
```

## Test procedure

1. Start (or restart) the ClaimCenter server in debug mode.
2. Log on to ClaimCenter as aapplegate/gw.
3. Navigate to the Allan Robertson claim and click Loss Details.
4. Click Edit.
5. Change the Loss Cause dropdown to Theft of entire vehicle.
6. Reassign the claim using assignment rules and verify that the claim goes to Complex Thefts - West.

Pol:54-253465 | Ins:Allen Robertson | DoL:10/14/2017 | St:Open | Adj:Brad TestUser (Complex Thefts - West)

## Loss Details

Loss Location		Officials (empty)	
Location	345 Fir Lane La Canada, CA 91352	Type	Name Report #
Location Description			
Location Code			
Jurisdiction	California		

7. Modify the claim so that the loss location is in an eastern state, such as New York.
8. Reassign the claim using assignment rules and verify that the claim goes to Complex Thefts – East.

Pol:54-253465 | Ins:Allen Robertson | DoL:10/14/2017 | St:Open | Adj:Cleo TestUser (Complex Thefts - East)

## Loss Details

Date of Loss		Name Severity Description	
10/14/2017 12:00 AM			
Loss Location		Officials (empty)	
Location	345 Fir Lane La Canada, PA 91352	Type	Name Report #
Location Description			
Location Code			
Jurisdiction	Pennsylvania		

## Solution 2: Assigning FNOL error activities to claim creator

1. Create the needed administrative data.
  - a) Log on to ClaimCenter as su/gw.
  - b) Navigate to Administration > Business Settings > Activity Patterns.
  - c) Create a new activity pattern that includes the following criteria:

Subject:	Verify FNOL entry error
Subject:	Verify FNOL entry error



Category:	Request
Code:	FNOL_error_Ext
Calendar importance	High

## Activity Pattern Detail - Verify FNOL Entry Error [Up to Activity Patterns](#)

### Activity Pattern

Subject \*

Short Subject

Class \*

Type

Category \*

Code \*

Priority \*

Mandatory \* ☐ Yes ☒ No

Calendar Importance \*

### Activity Pattern Dates

Target days

Target hours

Target start point

Include these days

Escalation days

Escalation hours

Escalation start point

Include these days

- d) Log out of ClaimCenter.
- e) Stop the ClaimCenter server.

### 29. Create the rule.

Create an activity assignment rule that assigns any activity based on the "FNOL\_error\_Ext" pattern to the person who created the claim.

- Use the claim.CreateUser field.
- Ensure that the rule fires before any other rules which may assign the activity.
- If the claim does not have a CreateUser (may occur with imported claims), then assign the activity to the supervisor of the group which currently owns the claim.
- Use the Global Activity Assignment rule set.

The screenshot shows **Global Activity Assignment Rule GAA00500 – FNOL entry error**.

USES:

```
CONDITION (activity : entity.Activity):  
return activity.ActivityPattern.Code == "FNOL_error_ext"  
  
ACTION (activity : entity.Activity, actions : gw.rules.Action):  
  
var theUser = activity.Claim.CreateUser  
var theGroup = theUser.RootGroup  
  
if (activity.CurrentAssignment.assign(theGroup, theUser)) {  
    actions.exit()  
} else {  
    activity.CurrentAssignment.assign(activity.Claim.AssignedGroup,  
        activity.Claim.AssignedGroup.Supervisor)  
    actions.exit()  
}  
END
```

## Test procedure

1. Start the ClaimCenter server in debug mode.
2. Log in as aapplegate/gw.
3. Using the quick claim wizard, create a personal auto claim.
4. Assign the claim to Dan Henson.
5. Log out of ClaimCenter and then log back in as dhenson/gw.
6. Create a “Request” activity on the claim using the “Verify FNOL entry error” activity pattern.
7. Verify that the activity is automatically assigned to Andy Applegate.

Workplan

All open activities ▾										(1 - 1 of 1)	Columns
<input type="checkbox"/>	Due ▴ ▾	Priority ▴ ▾	Status ▴ ▾	Subject ▴ ▾	Exposures ▴ ▾	External ▴ ▾	Ext Owner ▴ ▾	Assigned By ▴ ▾	Assigned To ▴ ▾		
<input type="checkbox"/>	03/12/2018	Normal	Open	Verify FNOL Entry Error		No		Dan Henson	Andy Applegate		

## Solution 3: Assigning vandalism claims manually

### 1. Create the rule.

Create a claim assignment rule that assigns any claim with an assigned group and a loss cause of "Malicious mischief and vandalism" to the supervisor of that group for manual "pending assignment".

The screenshot shows Default Group Claim Assignment Rule DCG00100 – Auto vandalism.

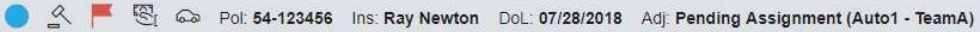
```
USES:

CONDITION (claim : entity.Claim):
return claim.LossType == LossType.TC_AUTO
    and
    claim.LossCause == LossCause.TC_VANDALISM
ACTION (claim : entity.Claim, actions : gw.rules.Action):

if (claim.CurrentAssignment.assignManually(claim.AssignedGroup.Supervisor)) {
    actions.exit()
}
END
```

## Test procedure

1. Restart the ClaimCenter server in debug mode.
2. Log in to ClaimCenter as aapplegate/gw.
3. Navigate to any auto claim and change its loss cause to "Malicious mischief and vandalism."
4. Reassign the claim using automated assignment.
5. Verify that the Adjuster field in the status bar reads "Pending assignment."

Pol: 54-123456 Ins: Ray Newton DoL: 07/28/2018 Adj: Pending Assignment (Auto1 - TeamA)

### Loss Details

Details

Loss Details

Description

Insured hit other party's car on the front passenger side while making a left turn.

Loss Cause

Malicious mischief and vandalism

Vehicles

Make	Model	Plate	State	Loss Party	Driver
Mazda	626	7FDG745	California		Bo Simpson
Saturn	SL	1HGJ465	California		Stan Newton