Lesson 3   Configuring Claim Intake

Wizards, including the First Notice of Loss (FNOL) wizard, help make sure that the correct information on a claim is taken in the correct order. You can modify a wizard to better reflect the information your organization gathers and the order in which it is gathered.

Prerequisites

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**.

3.1   Configuring the FNOL wizard

During claim intake for Personal Auto claims, Succeed Insurance customer service representatives often access the list of involved vehicles several times throughout the intake call.

They want service reps to have an easier time identifying where to access this information in the wizard. Therefore, they are requesting that the list of involved vehicles, currently located on the Basic Info step, be moved to its own Vehicle Info step.

Tip

Before proceeding, read all the steps below to understand the overall process.

Exercise

Exercise 1: Configuring the FNOL wizard

At a high level, you will start with the existing screen and use two copies of the screen to represent 1) the new basic info screen for Personal Auto claims, and 2) the new vehicle info screen for Auto claims. The original screen will still be used for non-Personal Auto claims.

1. **Create a new screen to contain the Vehicle information.**

    Recommended approach:

    o   Duplicate (copy) the existing Basic Info screen that contains the Vehicle info.

- o   Give it a new filename, FNOLWizard_VehicleInfo_ExtScreen.
- o   In the new VehicleInfo screen, disable the entire left column.

2. **Before proceeding, read all the steps below to understand the overall process 2.   Ensure that the right hand panel of the default screen will not be visible for personal auto claims.**

3. **Create new display keys containing the title and the labels associated with your new Wizard Step.**

    Recommended approach:

    - o   Locate the display keys used for the Basic Info wizard step.
    - o   Copy these display keys and modify the copies appropriately.

4. **Create a new wizard step immediately after the Basic Information step which is labeled "Vehicle Information" in the sidebar.**

Recommended approach:

- o   Duplicate the Basic Info wizard step and modify it to refer to your new Vehicle Info screen.
- o   Clear the mode property.
- o   Modify the title and label properties to refer to the display keys you created.

5. **Modify the wizard step so that the Vehicle Information step appears only for Personal Auto claims.**

Test procedure

1. **In ClaimCenter, type Alt+Shift+L to reload PCFs.**

6. **Log on as aapplegate/gw.**

7. **Start a new personal auto claim using any policy (such as 54-123456).**

    a)   Verify that the Basic Information step contains no list of vehicles.
    b)   Verify that the Vehicle Information step appears as expected. (It may not appear until you get to the Basic Information step.)
    c)   Cancel the claim.

8. **Start a new Homeowner's claim using any Homeowner's policy (such as policy 73-300676)).**

    a)   Verify that the Vehicle Information step does not appear in the sidebar.
    d)   Verify that the property info is still displayed in the right column of the Basic Information step.
    e)   Cancel the claim.

9. **Start a new Commercial Auto claim using any Commercial Auto policy (such as policy 64-318764 (Long Road Trucking)).**

    a)   Verify that the Vehicle Info step does not appear in the sidebar.
    f)   Verify that the Involved Vehicles step appears in the sidebar.

g) Verify that the Involved Vehicles do display on the right column of the Basic Information step.
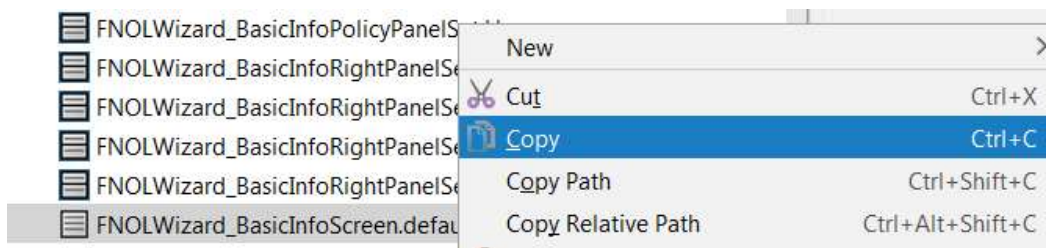
h) Cancel the claim.

3.2 Solution
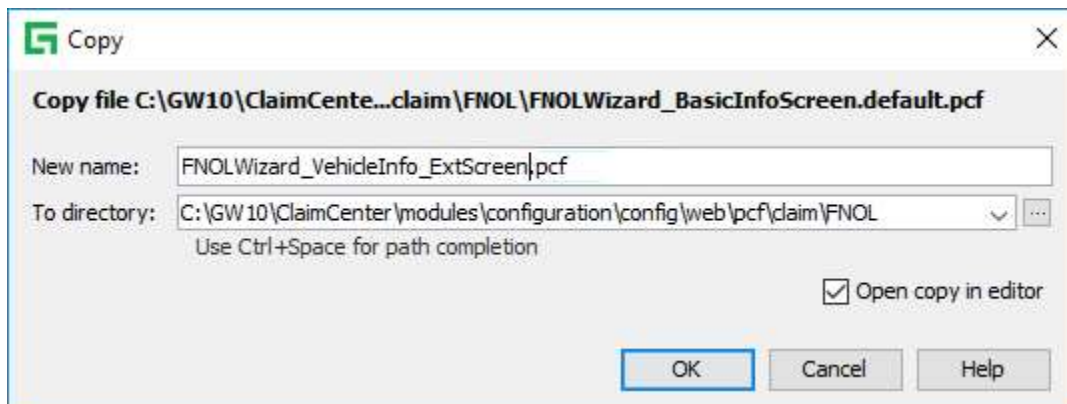
Solution 1: Configuring the FNOL wizard

1. **Create a new screen to contain the Vehicle information.**
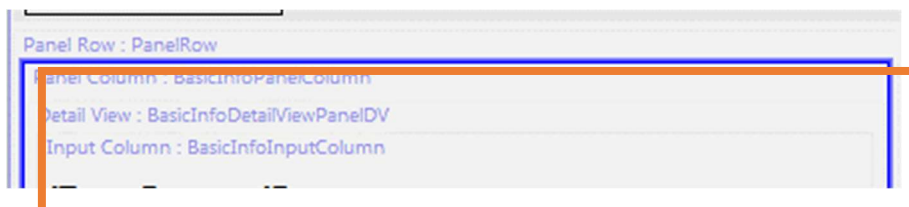
   Recommended approach:

   o   Duplicate (copy) the existing Basic Info screen that contains the Vehicle info.

   o   Give it a new filename, FNOLWizard_VehicleInfo_ExtScreen.

   o   In the new VehicleInfo screen, disable the entire left column.

10. **Ensure that the right hand panel of the default screen will not be visible for personal auto claims.**

11. **Create new display keys containing the title and the labels associated with your new Wizard Step.**
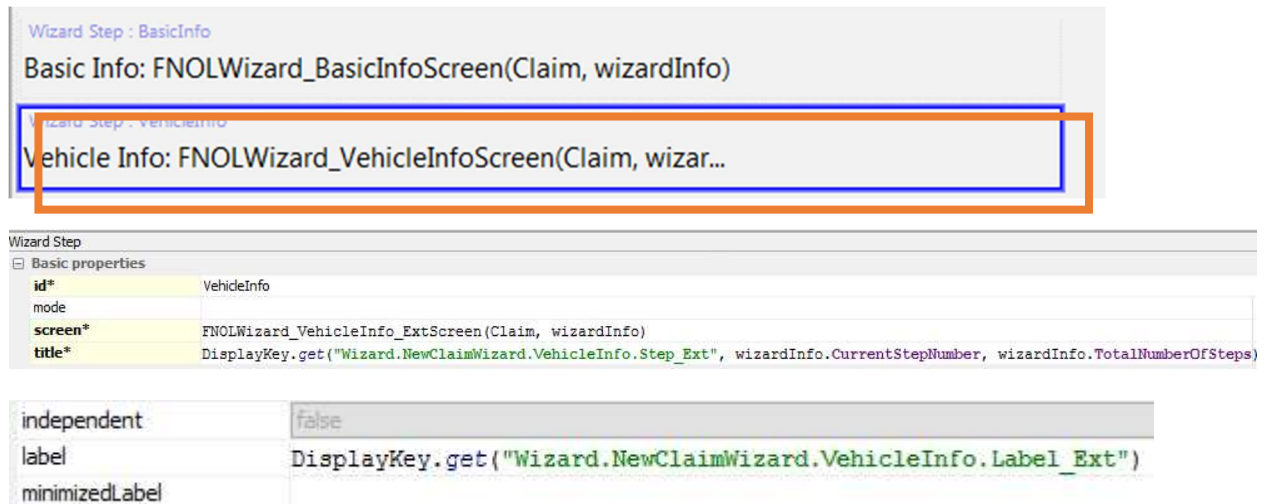
    Recommended approach:

    o   Locate the display keys used for the Basic Info wizard step.

    o   Copy these display keys and modify the copies appropriately.

```
Wizard.NewClaimWizard.NewClaimMainContacts.Label = Basic Info
Wizard.NewClaimWizard.NewClaimMainContacts.Step = Step {0} of {1}\: Basic information
Wizard.NewClaimWizard.NewClaimVehicleInfo.Label = Vehicle Info
Wizard.NewClaimWizard.NewClaimVehicleInfo.Step = Step {0} of {1}\: Vehicle information
```

12. **Create a new wizard step immediately after the Basic Information step which is labeled "Vehicle Information" in the sidebar.**

    Recommended approach:

- o Duplicate the Basic Info wizard step and modify it to refer to your new Vehicle Info screen.
- o Clear the mode property.
- o Modify the title and label properties to refer to the display keys you created.

Wizard Step : BasicInfo

Basic Info: FNOLWizard_BasicInfoScreen(Claim, wizardInfo)

Vizard Step : VehicleInfo

Vehicle Info: FNOLWizard_VehicleInfoScreen(Claim, wizar...

Wizard Step
Basic properties

id*	VehicleInfo
mode	
screen*	FNOLWizard_VehicleInfo_ExtScreen(Claim, wizardInfo)
title*	DisplayKey.get("Wizard.NewClaimWizard.VehicleInfo.Step_Ext", wizardInfo.CurrentStepNumber, wizardInfo.TotalNumberOfSteps)

independent	false
label	DisplayKey.get("Wizard.NewClaimWizard.VehicleInfo.Label_Ext")
minimizedLabel	

13. **Modify the wizard step so that the Vehicle Information step appears only for Personal Auto claims.**

allowNext	
available	Claim.Policy.PolicyType == PolicyType.TC_PERSONALAUTO
beforeSave	

| showNextIfLastStep | false |
| visible | Claim.Policy.PolicyType == PolicyType.TC_PERSONALAUTO |

Test procedure

1. **In ClaimCenter, type Alt+Shift+L to reload PCFs.**

14. **Log on as aapplegate/gw.**

15. **Start a new personal auto claim using any policy (such as 54-123456).**

   a) Verify that the Basic Information step contains no list of vehicles.

Step 2 of 6: Basic information

Cancel | Back | Next

Reported By

|		
How Reported	Phone ▾	
Name	* <none> ▾	▾
Relation to Insured	* <none> ▾	
Date of Notice	03/28/2018 📅	

i) Verify that the Vehicle Information step appears as expected. (It may not appear in the sidebar until you get to the Basic Information step.)

Actions

New Claim Wizard

Find Policy

Basic Info

Vehicle Info

Loss Details

Services

🚗 Pol:54-123456 | Ins:Ray Newton | DoL:03/28/2018 | St:Draft

Step 3 of 6: Vehicle information

Involved Vehicle(s)

☐ 1996 Toyota Corolla (2GDH967 / California)

☐ 1997 Saturn SL (1HGJ465 / California)

j) Cancel the claim.

16. **Start a new Homeowner's claim using any Homeowners policy (such as73-300676).**

a) Verify that the Vehicle Information step does not appear in the sidebar.
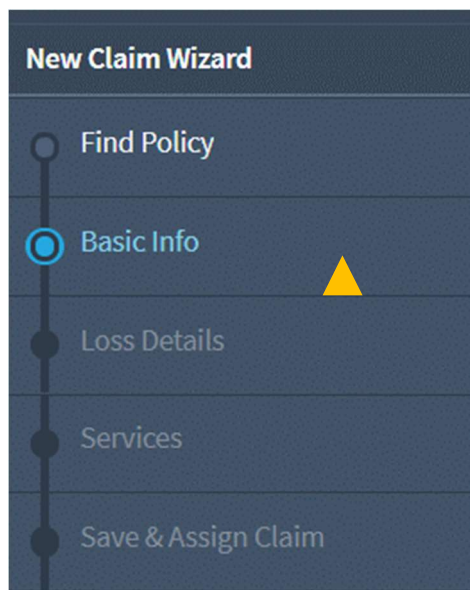
k) Verify that the property info is still displayed in the right column of the Basic Information step.

Step 2 of 5: Basic information

Reported By

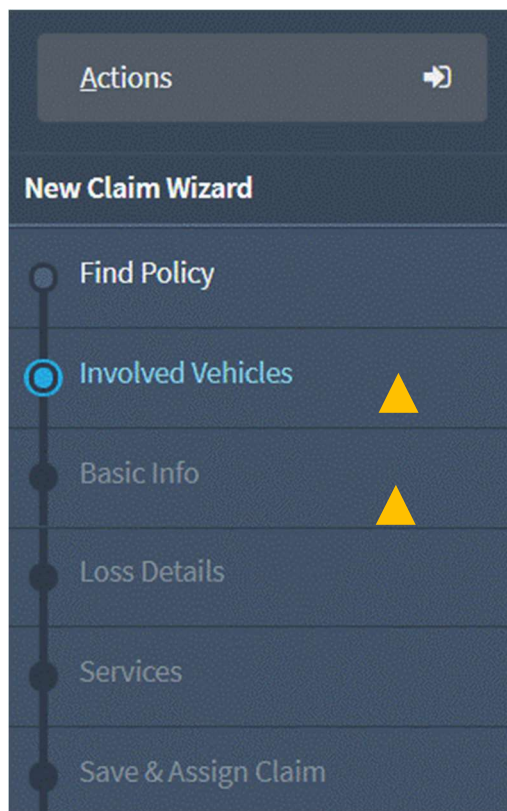| How Reported | Phone ▼ |
| Name | * <none> ▼ ▼ |

Address on Policy

215 Maple Ave., Thorndike, MA 01079

l) Cancel the claim.

17. **Start a new Commercial Auto claim using any Commercial Auto policy (such as policy 64-318764 (Long Road Trucking)).**

a) Verify that the Vehicle Info step does not appear in the sidebar.

m) Verify that the Involved Vehicles step does appear in the sidebar.

n) Verify that the Involved Vehicles do display on the right column of the Basic Information step.

Step 3 of 6: Basic information

Cancel

Reported By

How Reported	Phone ▾
Name	* <none> ▾
Relation to Insured	* <none> ▾
Date of Notice	03/28/2018 📅

Involved Vehicle(s)

☑ **1990 WhiteGMC Tractor-2 (1839460 / North Carolina)**

| Collision | $1,000.00 Deductible; $10,000.00 Limit |
| Liability | $30,000.00 Limit |

o) Cancel the claim.