Lesson 1 Configuring ClaimCenter Financials – Transactions

ClaimCenter has a powerful and flexible financial model that can be configured to meet your organization's specific needs. This allows you to ensure that reserves and payments meet strict guidelines, without significant amounts of manual intervention.

Prerequisites

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

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

ClaimCenter Server should *not* be running when you start the exercise.

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

1.1   Record of note

At Succeed Insurance, the current claims processing system writes a "record of note" every time a reserve transaction is created. It captures the cost type, cost category and the total amount of the reserve transaction. Even though this information appears on the Transaction list on the Financials screen, Succeed Insurance wants to ease the transition to the new system by mimicking the "record of note" behavior in the old system.

Exercise

Write a rule that creates the required record notes.

Tip

This exercise uses History records, which are covered in detail in a later lesson.

Exercise 1: Record of note

1. **Write a transaction rule that creates a note every time a reserve transaction is created.**
   a) The note topic should be **general**.
   b) The Subject: line should read: **<Cost Type> Reserve Transaction**.
   c) The Related To field should be populated with the appropriate exposure.
   d) The note body should read: **<Cost Category> reserve transaction for $<Transaction Amount> created**.
   e) This rule should be executed *only* when the transaction is created.

2. **The implementation team has provided the following additional notes:**
   a) To meet Succeed's requirements, you must use the Reserve entity's **TransactionAmount** field for the note text.
   b) Since the note will be written when the transaction has been set up (and not when it is modified), you should create the rule in a Post Setup ruleset.

Test procedure

1. **Start the ClaimCenter server.**

2. **Log in as aapplegate/gw.**

3. **Navigate to a claim with an existing exposure, where coverage is not in question, such as the Allen Robertson claim (235-53-365871).**

4. **Create two or more reserve lines against the exposure. Save the reserves and verify that notes are added to the claim for each reserve transaction.**

5. **Edit one line's comment. Verify that a note is not added when editing the reserve.**

Stop

1.2 Payment matching reserve fraud detection

Succeed Insurance has identified that a common approach to claim fraud involves a disreputable employee who opens a claim, sets a reserve, and then makes a payment equal to the reserve amount. Succeed wants an activity created for the manager to perform a review whenever this occurs, determining whether to refer the check to the Special Investigations Unit (SIU).
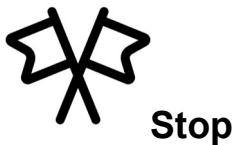
Exercise

Write a rule that creates the SIU review activity.

Exercise 2: Payment matching reserve fraud detection

1. **Create a transaction rule that creates a Special Investigation Claim Review activity whenever the amount of a check set equals the remaining reserves on the claim.**

   a) This rule should be executed every time a transaction is created.

   b) The activity should be generated whether or not the transaction is approved.

2. **The ClaimCenter implementation team has provided additional notes:**

   a) You can use the existing SI_review activity pattern.

   b) You do not need to worry about how the activity gets assigned.

Test procedure

1. **Restart the ClaimCenter server.**
2. **Log in as aapplegate/gw.**
3. **Create a new personal auto claim using the Quick Claim wizard.**

   a) There must be no exposures (do not add any vehicles, injuries, etc.).
   b) Be sure to enter a description.

4. **Create a Medical Payments exposure related to the claimant. Enter all necessary information, including details of the injury.**
5. **Create a reserve line for this exposure in the amount of $5000.**
6. **Verify that the claim and its exposure are at Ability to Pay. If they are not, take any necessary actions to bring them up to Ability to Pay.**
7. **Create a check against the reserve line in the amount of $5000.**
8. **Check the claim's Workplan. There should be an SI Review activity in the workplan.**

Stop