

Claim Number Generation Requirement Specification

**Version 1.9**

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| 1.0 |  |  | | New Document |
| 1.1 |  | Updated pages 2-6 | | Updated with new specification discussed in the meeting on 8 Jan 2015 |
| 1.2 |  | Page 5 | | Updated Parent Claim Codes |
| 1.3 |  | Page 5 | | Doubts under [INDIA Ebix 12 Jan 2015] |
| 1.4 |  | Page 6 | | India ebix Response on history codes |
| 1.5 |  | Page 6 | | Updated with more details on history codes |
| 1.6 |  | Page 6 | | Updated doubts on history codes |
| 1.7 |  |  | |  |
| 1.8 | 23 Jan 2015 |  | | Updated with comments from SG |
| 1.9 |  | Page no. 9 | | Clarification required |

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| **References** | | |
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# Overview

The objective of this document is providing information for “Claim Number Generation” of Claim registration module.

Business scenario:

1. On Accident screen, Parent Claim Number will be generated based on Business Units and Country Short Code (green is updated as of 23 Jan 2015).

Ex:

* First Claim: CLM/SG/BU/ 2015-1
* Second Claim: CLM/SG/BU/ 2015-2
* Tenth Claim: CLM/SG/BU/ 2015-10

**Business Units:**

* BU – Bus
* TR – Train
* PC – Private Car
* PB – Private Bus
* RV – Rental Vehicle
* CV – Commercial Vehicle
* TA – Taxi

Note: Country Short Code is retrieved from Country Master Details and it is recommended that the Short Code to be two alphabets only.

1. On claim tab as per the claim file received, different type of claim will be entered by user and a Claimant Record Number will be generated as per claim type.

Example:

* OD First Claim: OD-1
* OD Tenth Claim: OD-10
* BI First Claim: BI-1
* BI Tenth Claim: BI-10
* PD First Claim: PD-1
* PD Tenth Claim: PD-10

1. All Created Claims will be linked to Parent Claim Number which will be created under Accident screen.

## Specification

|  |  |  |  |
| --- | --- | --- | --- |
| ☒ | New | ☐ | Change Request |

* 1. Module

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ☐ | Diary | ☐ | System Admin Module | ☒ | Claim Registration |
| ☐ | Claim Payment | ☐ | Claim Recovery | ☐ | Claim Enquiry |
| ☐ | Upload | ☐ | Reports |  |  |

* 1. Development Type

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ☒ | Functionality | ☐ | Integration | ☐ | Rule |
| ☐ | Report | ☐ | Field | ☐ | Screen |

## Claim number digit information

### Parent Claim Number

**Format:** Main / Business Unit / Year – Running Number >>

**Main:**

CLM – Reported / Uploaded Claim

UCLM – Unreported Claim

*[INDIA Ebix 12 Jan 2015]*

* *Please provide following details:*
  + *Generation Criteria of each section of parent claim number.*
  + *We would like to know the screen and business logic behind each part of parent claim number.*
  + *We request you to provide “Case study” of claim to provide real time use of following :*
    - *parent claim number*
    - *Each section of parent claim number*
    - *Claimant record number*
* *What information we need to provide you regarding “History codes”.*
* *Please provide details of requirement of “History codes”, so that we can suggest solution.*

*Singapore EBIX 13 Jan 2015*

*- Generation Criteria of each section of parent claim number.* (Singapore 13 Jan 2015: CLM is for claims uploaded to the System, BU is to denote which Organization Category it belongs to, 2015 is to denote the Current Year and Running Number is to denote the number of claims that are being uploaded. Note that we also need to cater for Unreported Claims which are created manually. So I am thinking of suggesting UCLM is for Unreported Claims.

*-* What do you mean by Screen and Business Logic? Which part is not clear?

- Case Study:

1) When Claim is uploaded through the Claim Record File, CLM Claim Number is generated.

2) When Claim is created manually through the Application, the UCLM Claim Number is generated  
3) When User goes to Claim Tab and creates a Own Damage Claim and saves it , a Claimant Record Number is created. Likewise for Property Damage and Bodily Injury Claims. These are applicable for both Reported (CLM Type) and Unreported (UCLM Type)

4) For Attachment Tab, the Claimant Name and the Claim Type Number will appear as drop down so that users are aware on where to upload the documents properly.

- History Codes (as listed on previous page – P, LOG, R, M) are suggested for the Reserve and Payment History for users to get an overview on the Reserve Movements, Payment and Mandate Movement , LOG Requested as well as Recovery made… did we leave out any other History Codes that are to be on the Reserve And History Screen? If yes, please kindly suggest. If these codes are enough, then we shall proceed as it is.

Singapore EBIX 23 Jan 2015

- Note that there is a new Country Code that is needed for the Claim Number and Unreport Claim Number Generation.

- Country Code is defined by the Country Short Code in the Country Master in System Admin

*[INDIA Ebix 14 Jan 2015]*

* *Please discuss History codes in meeting for below doubts*
  + *Case study of history code.*
  + *Where history codes will be used?(Name of Screens on which history codes can be used )*
  + *Do we need to edit claim number based on history codes or history codes will work only for reporting purpose as mentioned below.*
* *Can we maintain history as mentioned below:*
  + - *Types of transactions can be followed as mentioned below:*

1. *Naming of transaction :*
   * + - *I : Initial reserve*
       - *P : Payment ( reserve movement due to payment)*
       - *M : Movement by user ( If user manually changed reserve )*
       - *F : Finalization of claim ( Due to finalization reserve changes)*
2. *These transaction types can be displayed on reserve, payment and mandate history screen.*

*Note: Similarly we can follow above steps for maintaining history of payment and mandate also .*

[Ebix Singapore 16 January 2015]

* *Case Study:*

*When a user makes a payment, the payment amount (also known as payment movement) will have a ‘P’ History Code and it will be reflected in the Reserve History.*

*When a user makes a Recovery Request, the Recovery Amount (also known as Recovery movement) will have a R History Code and it will be reflected in the Reserve History*

* *History Codes are to be shown on the Reserve History*
* *History Codes have no impact on the Claim Number. History Codes are only applicable for Reserve, Payment and Mandate Movements*
* *We are actually consolidating the Reserve, Payment, Mandate History Screen into one Single Screen or is it best to separate these screens?*

P – Payment Movement

LOG – LOG Request

R – Recovery Made

M – Mandate Movement/Reserve Movement

**Business Units:**

* + - BU – Bus
    - TR – Train
    - PC – Private Car
    - PB – Private Bus
    - RV – Rental Vehicle
    - CV – Commercial Vehicle
    - TA – Taxi

**Year:** Four Digits

**Running Number:** Running unique number starting from 1

Example:

* + - First Claim: CLM/BU/ 2015-1
    - Second Claim: CLM/BU/ 2015-2
    - Tenth Claim: CLM/BU/ 2015-10

.

*[INDIA Ebix 14 Jan 2015]*

1. Do we need to start running number from 1 for below mention sections.
   1. CLM and UCLM:
   2. Business units :
   3. Year
2. We request you to discuss claim sequencing based on sections of claim number in a meeting.

[Ebix Singapore 16 January 2015]

1) The very first Claim Number for Bus Category will be: CLM/BU/2015-1 and very first Unreported Claim Number for Bus Category will be UCLM/BU/2015-1

[India Ebix 4 Feb 2015]

1. On which basis we need to add country short code in unique claim number ?
   1. Do we consider organization country?
      1. For an example , if user enter organization belongs to singapore on accident screen , then system will consider , the claim is from singapore and generate number as per following
         1. UCLM/ SG/BU/2015-1

If organization belongs to country USA then system will generate below number

* + - 1. UCLM/US/BU/2015-1

1. Do we need to generate claim number for each section ( Main/Business unit/ year ) from 1, Every time section change.

Example :

* for reported claim number , claim number will as following:

CLM/BU/2015-1

* For reported claim number if business unit gets changed then , claim number will as following:

For train :

CLM/TR/2015-1

For Private Car:

CLM/PC/2015-1

* As per mentioned above whenever any claim comes for different business unit , system will generate claim number from 1.
* For unreported Claim number, claim number will as following:

UCLM/BU/2015-1

Note:

Similarly as per reported claim, whenever there will be any new claim for unreported claim under different business unit system will generate claim number from 1 only.

Ex:

UCLM/BU/2015-1, UCLM/TR/2015-1, UCLM/PC/2015-1

**Format:** Type – Running Number >>

**Type:**

OD – Own Damage

PD – Property Damage

BI – Bodily Injury

**Running Number:** Running unique number starting from 1

Example:

* + 1. OD First Claim: OD-1
    2. OD Tenth Claim: OD-10
    3. BI First Claim: BI-1
    4. BI Tenth Claim: BI-10
    5. PD First Claim: PD-1
    6. PD Tenth Claim: PD-10

### Name with Claimant Record Number

Format: Claimant Name (max 50 characters) – Claimant Record Number

**Claimant Name:** No spaces, maximum 50 characters (Ex. JohnTanAhDoe)

**Claimant Record Number:** Type – Running Number>>

**Example:**

* OD: JohnTanAhDoe-OD-1
* BI: SusanLeeAhDoe-BI-1
* PD: JasonOhAhDoe-PD-1