**Claim Diary View**

**1) Support Staff Group Members can create Diary Tasks for Claim Officers and once created they can see the created Tasks but they cannot edit anymore.**

**2) If Diary Tasks are created wrongly, Claim Officers will have to input the Completed Date to close the Diary Task.**

**3) Claims Officer Group can see all the created Diary Tasks related to the Claim but they cannot edit / reassign those claims assigned to other Claim Officers.**

**4) Claim Officer Group can also create Diary Tasks for Claim Officers but cannot edit/reassign those claims assigned to other Claim Officers**

**5) Manager / Supervisor will see all diary Tasks related to the Claim and edit / reassign to other Claim Officers.**

[Varun 24 september 2014] :

Our understanding on Diary permission functionality

Diary screen under claim registration

1) Only Diary Owner ( to whom diary assigned ) and manager can edit or re-assign diaries.

2) Diaries can be view by all users related to a particular claim.

Dashboard screen

1) Based on Special permission diary to a Group ( Manager )for all users and diary re-assignment can be done.

Doubts

1) Functionality of Expiry date: What will happen if Diary has been expired.

For an example: diary created and assigned to user A with expiry date of 24 september. In case diary not completed then what will be functionality of diary.

Dex: There will be email reminder to inform the Claims Officer ‘x’ days before Estimated Completion Date as well as Final Reminder that Task has expired and they will have to manually go into the System to change the Estimated Completion Date Field.

2) Diary Listing after Re-assignment: Do we need to modify existing diary listing and display the same diary with modified information as per diary reassignment?

\*For an example: D1 assigned to CO(1) and then it is re-assigned to CO(2).

\* Diary grid will show below change in diary listing in all user's login screen and on dashboard also.

Dex: Yes

\* Assigned to will be changed to CO(2)

Dex: Yes

\* Reassigned diary will be changed to “Yes” from “No”

Dex: Yes

3) Completion of diary : Do we need to make a diary completed if completed date field filled with a date and diary saved?

Dex: to show Status -- Completed

3.1) Is there any criteria or validation on completed date?

Dex: CDGI has not shared anything. Maybe we can suggest to prompt users whereby is it confirmed that this Task is completed.

**Reserve Screen**

**1) Include Two New Columns – Movement And Current.**

**2) Remove All Entries under Dropdown except for LOG Request.**

**3) Only when user has created Own Damage Claims and PD / BI Claims, these entries will be allowed to create Reserve Movement and tracking of Current Movement in the Reserve Screen. A Grid is required to show these created Claims and to show the Outstanding Amount.**

**4) Inputs entered in the Initial Reserve during OD / BI / PD Claims Creation will flow to the Reserve Screen under its individual claim. User can select each claim entry to input the Reserve Moment and System will calculate and update the Current Movement.**

**5) \*\* To Be Confirmed By CDGI \*\* We have proposed that the Initial Reserve Section in OD / PD / BI to be removed and user will create all the Initial Reserve under Reserve Screen during Claim Registration. This means that during the initial Claim Registration, the Reserve Screen is not locked and is allowed for editing after users have created any OD / PD / BI Claims.**

[Varun 24 september 2014] :

1) Please provide New reserve history popup screen layout.

Dex: we will follow the layout as per “proposed reserve screen mockup 24 sep 2014 v3.doc”. This will be the same for OD / PD / BI and Reserve Screen”

**Master Tables**

**1) To Group Insurer, Lawyer, Surveyor, Workshop and Hospital under One Centralized Tab inside System Admin.**

**2) CDGI and Third Party Service Providers (Insurer, Lawyer, Surveyor, Workshop) to follow the new layouts as per the Third Party Master Table V2.pdf**

**Additional Information:**

**3) Effective From Date and Effective To Date are manually input.**

**4) Service Provider will always be marked as Active during the Effective From Date and Effective To Date (dates are inclusive). When it is passed the Effective To Date, System will automatically change the Status from Active to Inactive.**

**5) Users can always go to the Master Tables to edit the records and System will automatically reflect the changes in all the created Claims except for Claims that have Claimant Status as Finalized.**

**6) It is only when users change Finalized Status to Reopened Status, System will then update that Claim Record with any changes to the Master Tables.**

**7) System is to keep history of the changes made to any of the Master Tables. There will be a button “View History” for each of the Service Provider and once clicked, there will be an overlay to show the list of history of the changes made to the Service Provider. If User clicks Save without changing any Data, system must not keep track of this history.**

[Varun 24 september 2014] :

a) We are proceeding with development for view history in all service provider master screens.

**8) Documents generated and stored in the Claims Document Section with any Old Master Table Data will not change. In order for Documents to reflect the changes in the Master Table, User will rec-click and generate the Document again.**

[Varun 24 september 2014] :

a) As discussed in 23 sep meeting, please provide details after review of requirement no. 5,6 and 8.

**Own And Third Party Service Providers Layout In OD / PD / BI Screen**

**1) Own Service Providers to have its own individual Section**

**2) Own and Third Party Service Provider Layout to be the same**

**3) Both layout to have Two Editable Fields – Reference Number And Appointed Date for each Service Provider that is created.**

**4) Ignore the Effective From And Effective To Date Column that was asked to be displayed in the Grid. Instead replace it with a Checkbox. By Default, it is checked (include a new Status Column) to tell the system that this service provider is still active for the claim and when there is Document Generation (and two similar types exist and are active), System will prompt user to select the correct type to populate the Document.**

**5) When the new Status Column is unchecked, this means that this created service provider type is no longer active and should not be included in the Document Mapping.**

**6) System will populate the latest inputs from the Master Tables. All fields are not editable except for the Reference Number and Appointed Date**

[Varun 24 september 2014] :

a) Please provide feedback on tab screen of third party service provider.

Dex: we will need to discuss this with CDGI for the feasibility.

b) As discussed in 23 sep meeting, please provide details after review of requirement no. 4,5 and 6.

Dex: we will need to discuss this with CDGI if they still require this.