

Activities

Lesson Objectives

By the end of this lesson, you should be able to:

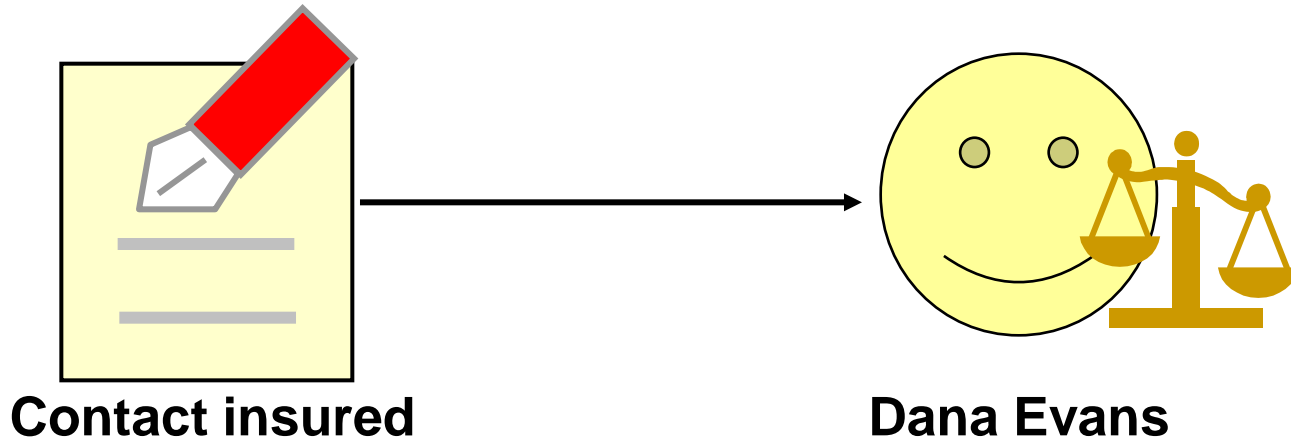
- Describe the functionality of activities
- Create activity patterns
- Create activities
- Review activities associated to a claim
- Take ownership of queued activities
- Edit and complete activities assigned to you

This lesson uses the notes section for additional explanation and information.
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.
If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

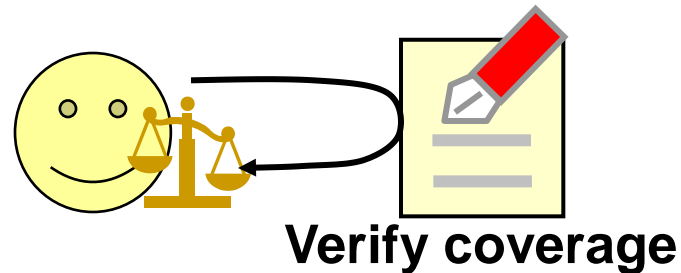
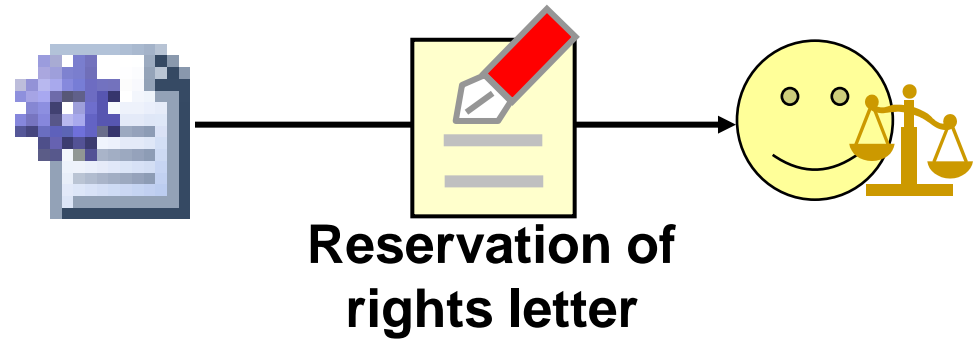
Review: Activities



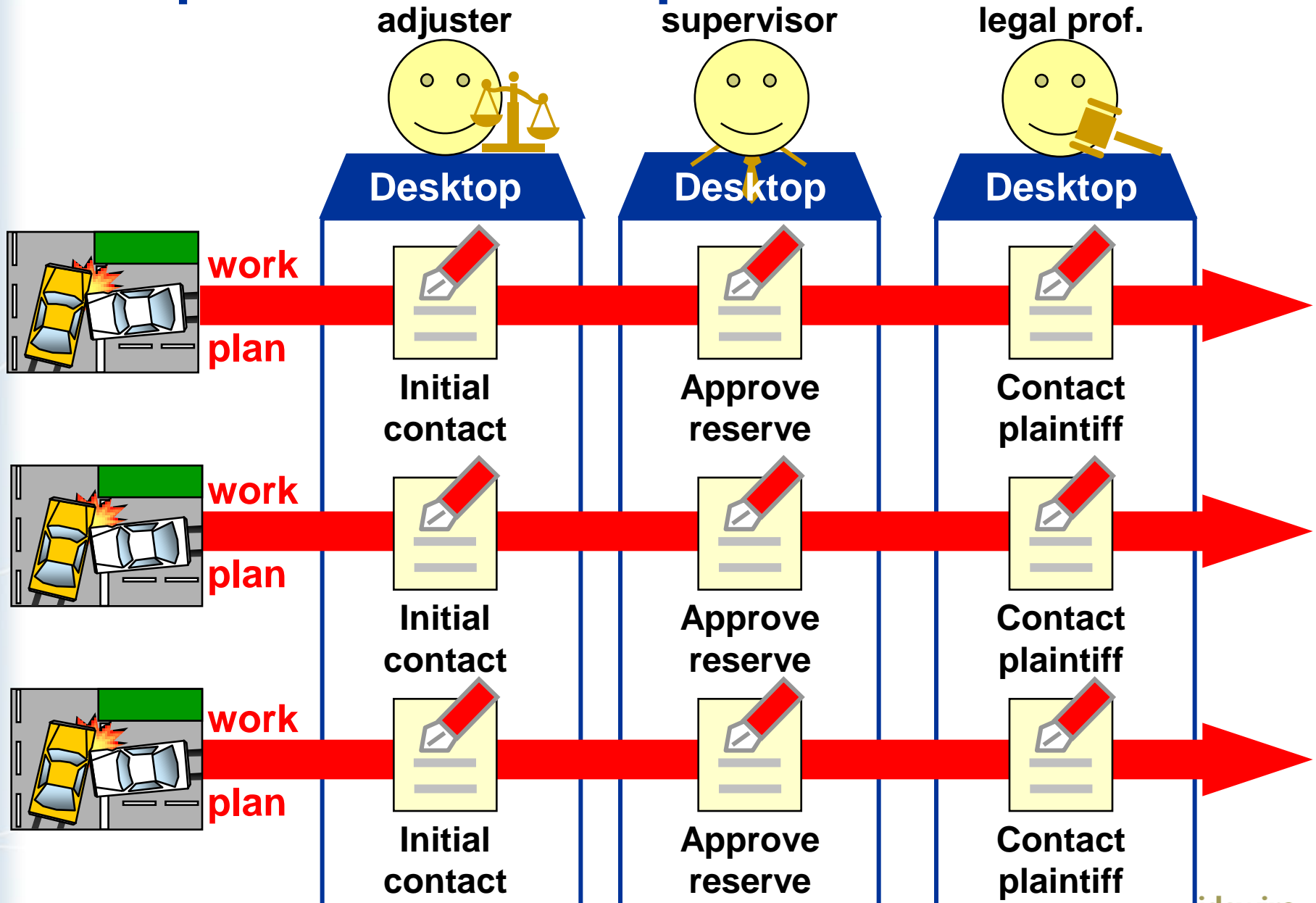
- ▶ An activity is a task required to process a claim
 - Ultimately assigned to a user responsible for completing the task
 - Identifies:
 - When the task is to be completed
 - Whether it has been done or not

Who Creates Activities And Why?

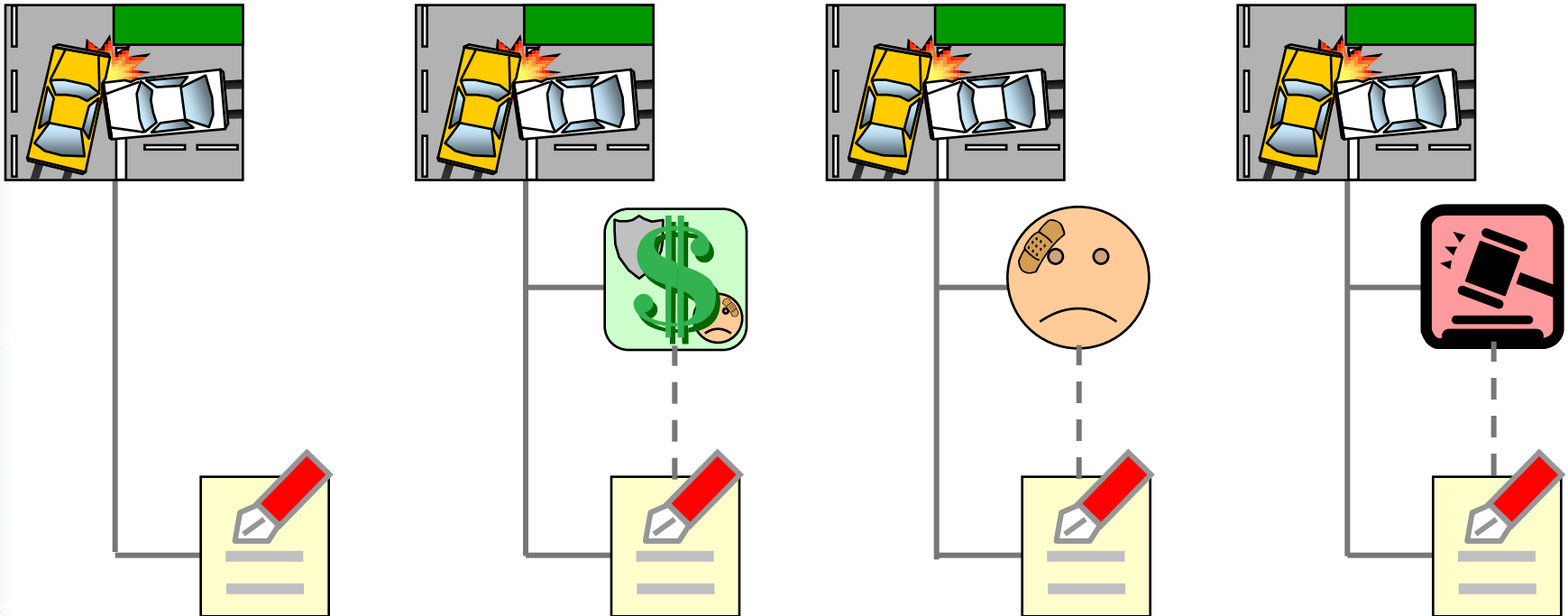
- ▶ Business rules create activities to implement common business practices
- ▶ Users create activities and assign them to themselves as a reminder of work to do
- ▶ Users create activities and assign them to others to request assistance with a claim



Workplans and Desktops

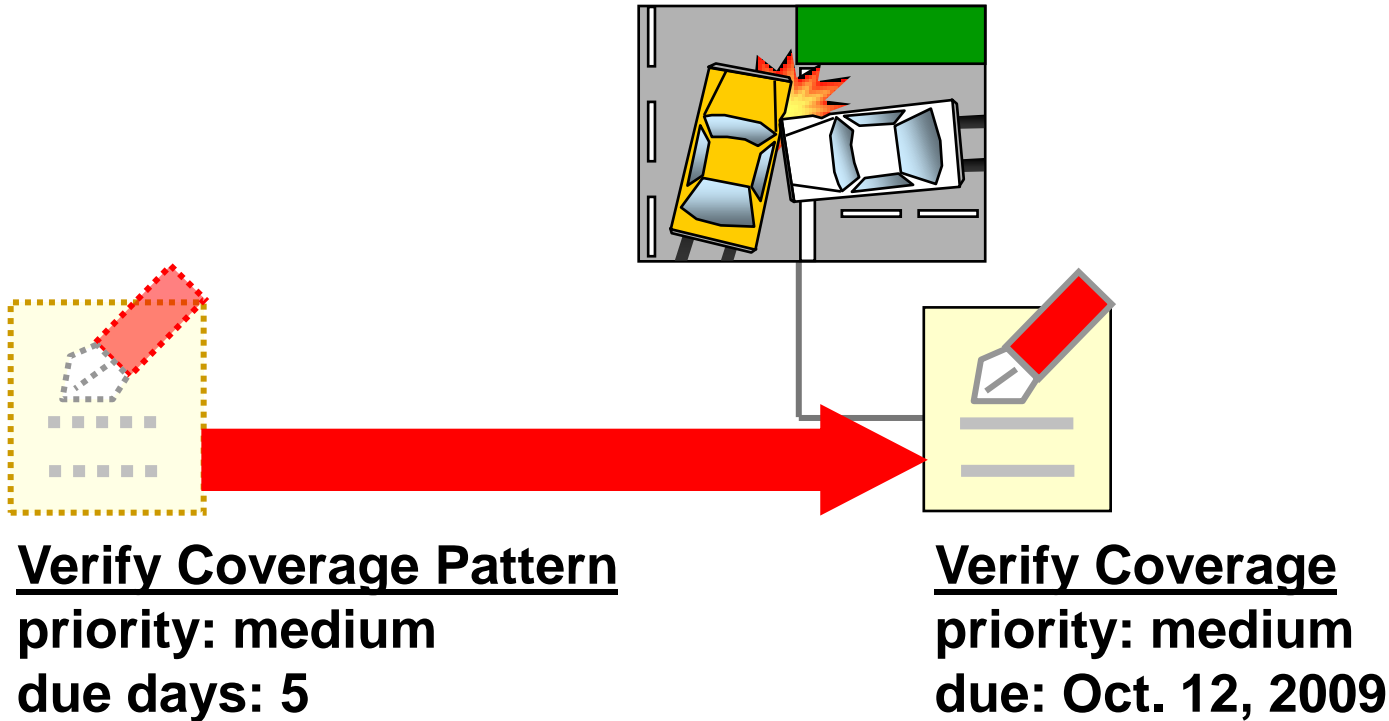


What Claim Objects Are Activities Associated To?



- ▶ Every activity is associated to a claim
 - Optional additional association to an exposure, contact, or matter on that claim

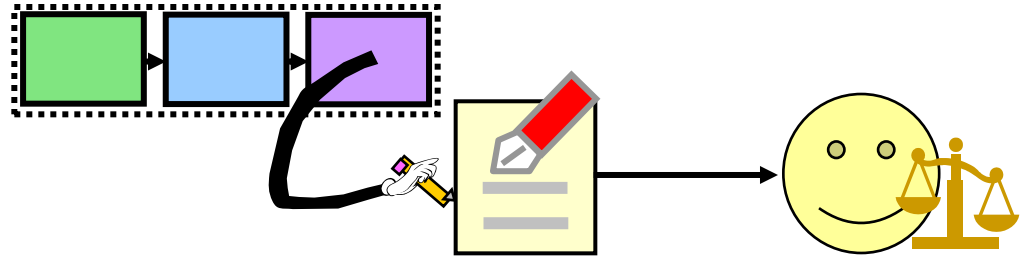
How Are Activities Created?



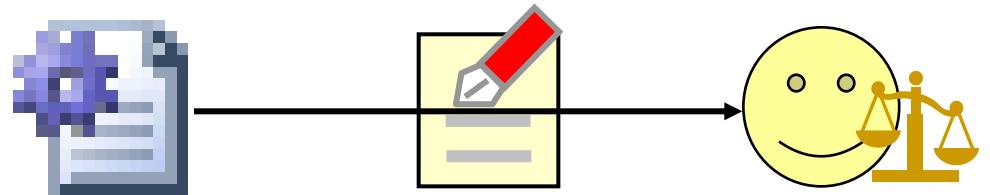
- ▶ Created from an "activity pattern"
 - An activity pattern is a template which specifies details about the activity (subject, priority, number of days until due, and so on)

When Are Activities Created?

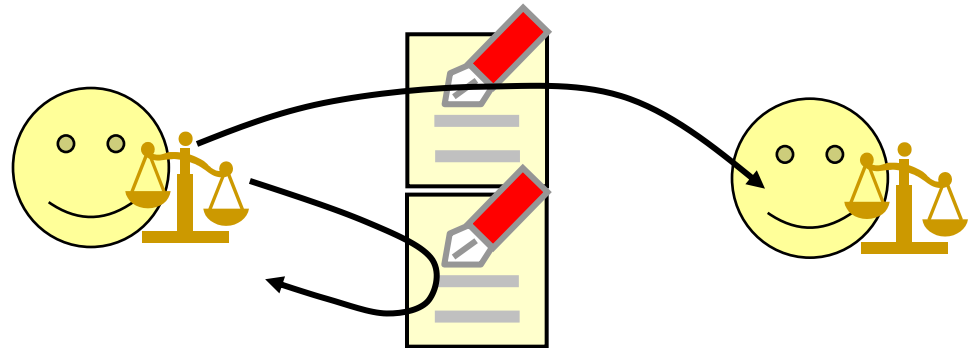
- ▶ Automatically during workplan step of claim setup



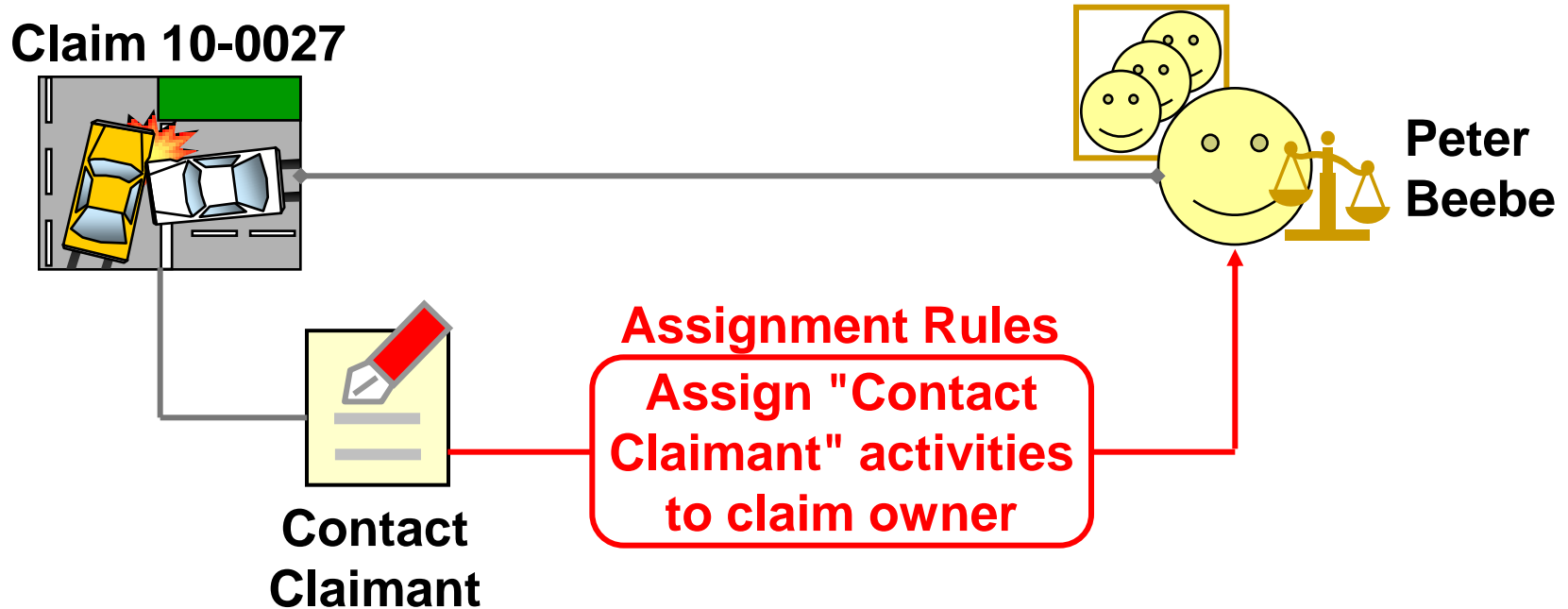
- ▶ Automatically in response to a specific business event



- ▶ Manually by a user at any time

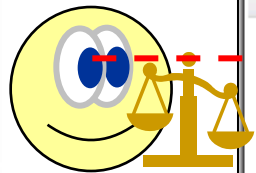


Activity Assignment



- ▶ Assigned to a user and group, which is selected either by:
 - Assignment rules, or
 - User creating or reassigning activity

Activity Ownership



Betty Baker

[DEV mode] Guidewire ClaimCenter (Betty Baker) Clai...

Guidewire ClaimCenter

Activity

Activity Detail for Claim 000-00-000304

Update Complete Skip Assign Link Document

Details

Subject * Make initial contact with insured

Description

Related To none (Claim)

Due Date 05/12/2008

Escalation Date 05/16/2008

Priority * Urgent

Calendar Importance * Not On Calendar

Mandatory No

Status Open

Externally Owned * ☐ Yes ☒ No

External Owner <none selected>

Activity Assignment

Assigned To Betty Baker

**activity
assigned to
Betty Baker**

[DEV mode] Guidewire ClaimCenter (Carlos Oppley) Cl...

Guidewire ClaimCenter

Activity

Activity Detail for Claim 000-00-000304

Assign Cancel View Notes

Details

Subject Make initial contact with insured

Description

Related To none (Claim-level)

Due Date 05/12/2008

Escalation Date 05/16/2008

Priority Urgent

Calendar Importance Not On Calendar

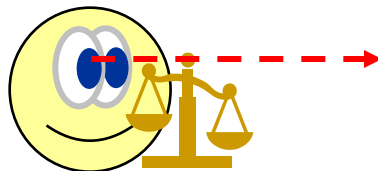
Mandatory No

Status Open

Externally Owned No

External Owner

Carlos Oppley



The Life Cycle of an Activity


**In progress
(new/updated)**

**In progress
(normal)**

Overdue

Escalated

**Closed
(complete or
skipped)**




<input type="checkbox"/>	★		Due	Priority ▾	Status	Subject
<input type="checkbox"/>	★		05/20/2008	High	Open	Verify coverage


<input type="checkbox"/>	★		Due	Priority ▾	Status	Subject
<input type="checkbox"/>			05/20/2008	High	Open	Verify coverage



<input type="checkbox"/>	★		Due	Priority	Status	Subject ▾
<input type="checkbox"/>			05/20/2008	High	Open	Verify coverage



<input type="checkbox"/>	★		Due	Priority	Status	Subject ▾
<input type="checkbox"/>			05/20/2008	High	Open	Verify coverage



<input type="checkbox"/>	★		Due	Priority	Status	Subject ▾
<input type="checkbox"/>			05/20/2008	High	Complete (Carlos Oppley: 05/21/2008)	Verify coverage

Overdue and Escalated Activities

<input type="checkbox"/>			<u>Due</u>	<u>Priority</u>	<u>Status</u>	<u>Subject</u> ▾
<input type="checkbox"/>			05/20/2008	High	Open	Verify coverage

Activity Pattern Detail - Verify coverage ([Up to Activity Patterns](#))

Activity Pattern	
Subject	Verify coverage
Short Subject	
Class	Task
Type	General
Category	Reminder
Code	coverage
Priority	High
Mandatory	Yes
Calendar Importance	Not On Calendar

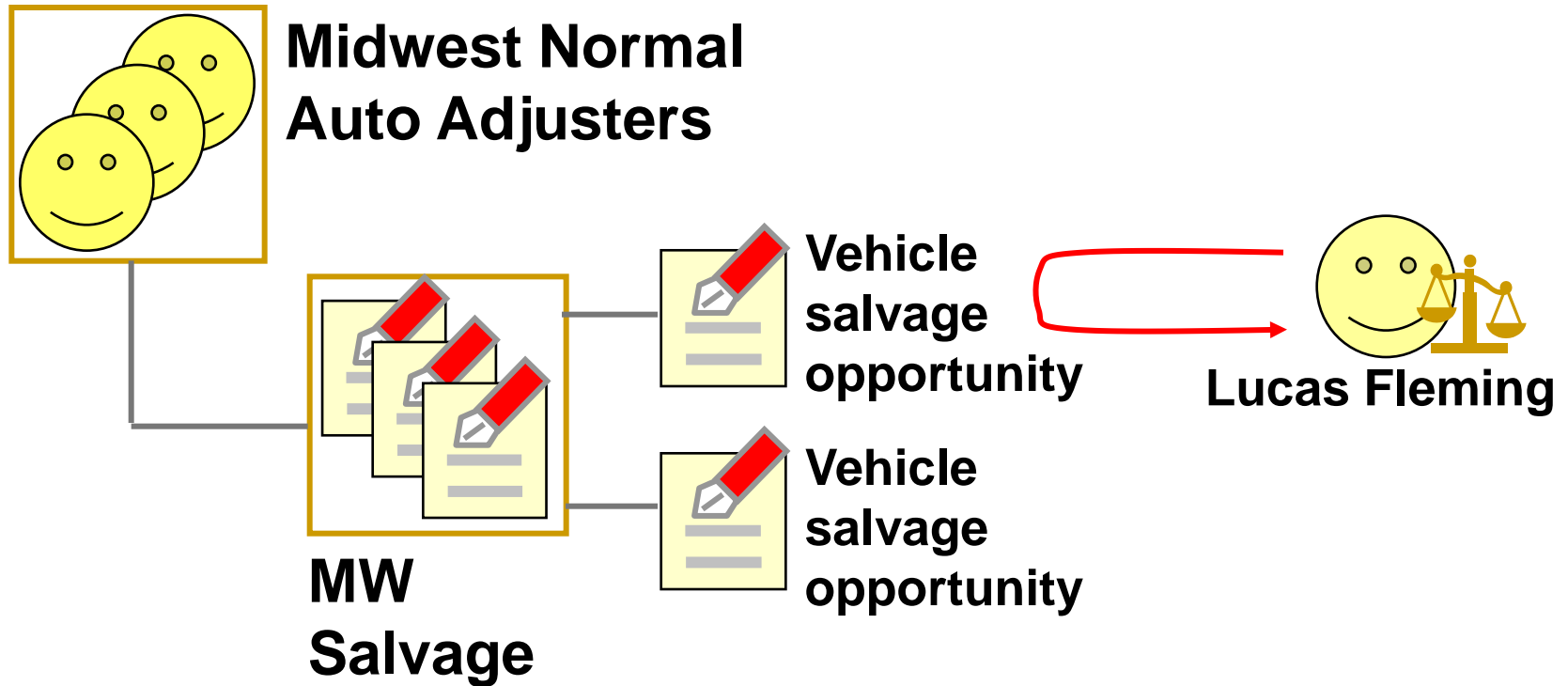
Activity Pattern Dates

Target days	2
Target hours	
Target start point	Activity creation date
Include these days	Business days
Business calendar type	Federal Holidays

Escalation days	10
Escalation hours	
Escalation start point	Claim notice date
Include these days	Calendar days

- ▶ Activity patterns can specify when an activity is overdue or escalated

Review: Queues



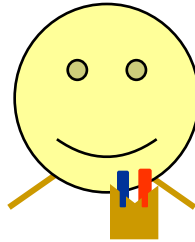
- ▶ A repository associated to a group which contains activities assigned to the group but not to any user in that group
 - Users in group can take ownership of activities in queue

Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

Activity Patterns

administrator



Search For Users

Search For Groups

Search For Regions

Activity Patterns

Attributes

Catastrophes

Authority Limit Profile

Roles

Regions

Holidays

Event Messages

Script Parameters

Workflows

Import/Export Data

Report Admin

Security Zones

Coverage Verification

Workers Comp

Parameters

Team Dashboard Administration Address Book Claim					
Activity Patterns (1 - 15 of 79)					
All Categories		Add Activity Pattern		Delete	
<input type="checkbox"/>	Subject^	Class	Category^^	Type	Priority
<input type="checkbox"/>	30 day diary	Task	Reminder	General	Normal
<input type="checkbox"/>	60 day diary	Task	Reminder	General	Normal
<input type="checkbox"/>	90 day diary	Task	Reminder	General	Normal
<input type="checkbox"/>	Arbitration Date	Event	Litigation	Litigation	Urgent
<input type="checkbox"/>	Assign nurse to case	Task	Reminder	General	Normal
<input type="checkbox"/>	Check Denied	Task	Request	General	Normal
<input type="checkbox"/>	Check on medical clearance for light duty work	Task	Reminder	General	Normal
<input type="checkbox"/>	Check with employer about temp light duty work	Task	Reminder	General	Normal
<input type="checkbox"/>	Claim Catastrophe Related Changes	Task	Reminder	General	Normal
<input type="checkbox"/>	Closed File Review	Task	Reminder	General	Low

Attributes of an Activity Pattern

The image shows two overlapping software windows. The background window is titled 'Activity Pattern Detail - Get initial medical report (Up to Activity Patterns)'. It contains fields for 'Subject' (Get initial medical report), 'Class' (Task), 'Type' (General), 'Category' (Request), 'Code' (initial_med_report), 'Priority' (High), 'Mandatory' (Yes), 'Calendar Importance' (Medium), 'Claim loss type' (Workers' Comp), 'Automated only' (No), 'Available for closed claim' (No), 'Externally Owned' (Yes), 'Document Template', 'Email Template', 'Recurring' (No), and 'Description' (Get initial medical report for WC claims). The foreground window is titled 'New Activity in Claim 312-36-368889'. It contains fields for 'Subject' (Get initial medical report), 'Description' (Get initial medical report for WC claims), 'Related To' (none (Claim-level)), 'Due Date' (02/04/2008), 'Escalation Date' (../././....), 'Priority' (High), 'Mandatory' (Yes), 'Calendar Importance' (Medium), 'Recurring' (No), 'Externally Owned' (No), 'External Owner' (<none selected>), 'Document Template', 'Email Template', and 'Assign To' (Use automated assignment). Red annotations include: a red box around the 'Target days' field (value 4) in the 'Activity Pattern Dates' section; a red box around the 'Priority' (High) and 'Calendar Importance' (Medium) fields in the 'Activity Pattern Detail' form; a red box around the 'Priority' (High), 'Mandatory' (Yes), and 'Calendar Importance' (Medium) fields in the 'New Activity in Claim' form; and red arrows pointing from the 'Priority' and 'Calendar Importance' fields in the 'Activity Pattern Detail' form to the corresponding fields in the 'New Activity in Claim' form. There are also two red pencil icons in the top right corner of the windows.

Activity Pattern Detail - Get initial medical report (Up to Activity Patterns)

Update Cancel

Activity Pattern

Subject * Get initial medical report

Short Subject

Class * Task

Type General

Category Request

Code * initial_med_report

Priority * High

Mandatory * Yes No

Calendar Importance * Medium

Claim loss type Workers' Comp

Automated only * Yes No

Available for closed claim * Yes No

Externally Owned * Yes No

Document Template

Email Template

Recurring * Yes No

Description Get initial medical report for WC claims

Activity Pattern Dates

Target days 4

New Activity in Claim 312-36-368889

Update Cancel

Subject * Get initial medical report

Description Get initial medical report for WC claims

Related To none (Claim-level)

Due Date * 02/04/2008

Escalation Date ../././....

Priority * High

Mandatory Yes

Calendar Importance * Medium

Recurring No

Externally Owned * Yes No

External Owner <none selected>

Document Template

Email Template

Assign To Use automated assignment

Creating New Activity Patterns

Team Dashboard Administration Address Book Claim

Activity Patterns (1 - 15 of 79)

All Categories Add Activity Pattern Delete Page

☐ Subject▲ Class Category▲ Type Priority

☐ 30 day diary

☐ 60 day diary

☐ 90 day diary

☐ Arbitration Date

☐ Assign nurse to case

☐ Check Denied

☐ Check on medical cle

☐ Check with employer

☐ Claim Catastrophe Re

☐ Closed File Review

New Activity Pattern (Up to Activity Patterns)

Update Cancel

Activity Pattern

Subject *

Short Subject

Class * Task ▼

Type General

Category <none selected> ▼

Code *

Priority * Normal ▼

Mandatory * ☐ Yes ☒ No

Calendar Importance * <none selected> ▼

Claim loss type <none selected> ▼

Automated only * ☐ Yes ☒ No

Available for closed claim * ☐ Yes ☒ No

Externally Owned * ☐ Yes ☒ No

Document Template 🔍 ✕

Email Template 🔍 ✕

Recurring * ☐ Yes ☒ No

Description

Activity Pattern Dates

Target days

Target hours

Target start point <none selecte

Include these days <none selecte

Escalation days

Escalation hours

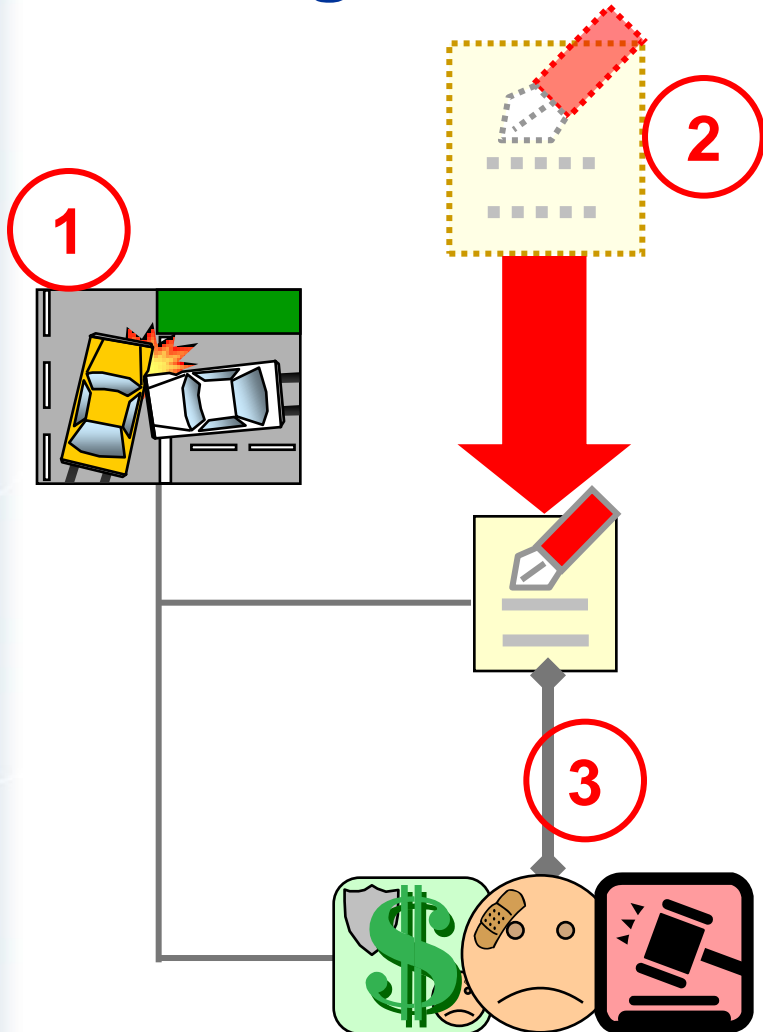
Escalation start point <none selecte

Include these days <none selecte

Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ **Creating Activities**
- ▶ Working with Claim Activities
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

Creating Activities



1. Navigate to parent claim
2. Select appropriate activity pattern
3. Identify associated exposure, claimant, or matter, if necessary
4. Specify additional information as needed (including assignment method)

Creating New Activities 1 and 2: Navigate to the Claim and Specify the Activity Pattern

New ...	New Activity	
<u>N</u> ote	Correspondence ▶	
<u>E</u> mail	<u>I</u> nterview ▶	Financials
<u>M</u> atter	New Mail ▶	<u>G</u> et a statement from witness
<u>E</u> valuation	Rem <u>i</u> nder ▶	<u>M</u> ake initial contact with claimant
Negotiation	Requ <u>e</u> st ▶	<u>M</u> ake initial contact with insured

- ▶ Activity patterns are grouped into related categories

Creating New Activities 3: Related To Object

New Activity in Claim 000-00-000203

Subject ★

Description

Related To none (Claim-level) ▼

Due Date

Escalation Date

Priority ★ ▼

Mandatory ★ ☐ Yes ☒ No

Calendar Importance ★ ▼

Recurring

Externally Owned ★ ☐ Yes ☒ No

External Owner

Document Template

Email Template

Assign To

none (Claim-level) ▼

none (Claim-level)

Allen Robertson

(1) 1st Party Vehicle - Allen Robertson

Bill Henderson arbitration

Burlingame Saab

Karen Egertson

Creating New Activities 4: Additional Info (Including Assign To Logic)

New Activity in Claim 000-00-000304

Subject *

Description

Related To

Due Date

Escalation Date

Priority *

Mandatory

Calendar Importance *

Recurring

Externally Owned * ☐ Yes ☒ No

External Owner

Document Template



Email Template

Assign To

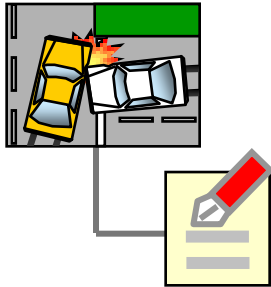
Assign To

- Use automated assignment
- Claim/Exposure Owner
- Andy Applegate (Auto1 - TeamA)
- Jill Randolph (Western Salvage Unit)
- Isabel Harkin (LA Auto Adjusters)

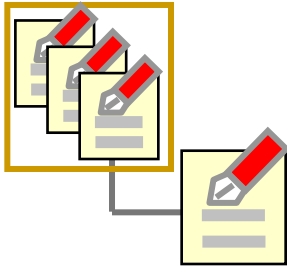
Creating New Activities: The New Activity

Workplan (1 - 4 of 4)								
All open activities ▾				Assign	Skip	Complete	Approve	Reject
<input type="checkbox"/>	★		<u>Due</u>	<u>Priority</u> ▾	<u>Status</u>	<u>Subject</u>	<u>Exposures</u>	<u>Assigned To</u>
<input type="checkbox"/>	★		05/20/2008	Normal	Open	Get a statement from witness		Betty Baker
<input type="checkbox"/>			05/20/2008	High	Open	Verify coverage		Betty Baker
<input type="checkbox"/>			05/12/2008	Urgent	Open	Make initial contact with insured		Betty Baker
<input type="checkbox"/>			05/21/2008	Urgent	Open	Special Investigation Claim Review		Rick Ralston

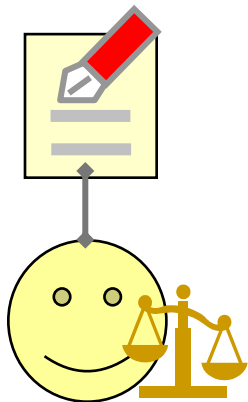
What Can You Do With Activities?



- ▶ For activities associated to a claim, you can:
 - View them (and filter them)
 - Search for them



- ▶ For activities in a queue, you can:
 - View them
 - Take ownership of them



- ▶ For activities you own, you can:
 - View them
 - Modify them
 - Reassign them
 - Complete or skip them

Lesson Outline

- ▶ Activity Basics
- ▶ Working with Activity Patterns
- ▶ Creating Activities
- ▶ **Working with Claim Activities**
- ▶ Working with Queued Activities
- ▶ Working with Your Activities

Viewing the List of Claim Activities

Summary

Workplan

Loss Details

Exposures

Parties Involved

Policy

Financials

Notes

Documents

→
↓

Summary

Loss Date 05/01/2008 12:00 AM
 Notice Date 05/10/2008
 Loss Location 2563 West Ave., Orange, CA 91357
 Description Head on collision at blind corner

Exposures

#	Type	Coverage	Claimant	Adjuster	Status

Parties Involved

Name▲	Roles	Phone
Karen Egertson	Agent	213-457-6378
Angel Ramirez	Witness	
Scott Shiu	Covered Party	619-275-2346
Brittany Turner	Insured, Main Contact, Reporter	213-457-6378

Workplan (1 - 4 of 4)

<input type="checkbox"/>			Due	Priority▼	g
<input type="checkbox"/>			05/20/2008	Normal	C
<input type="checkbox"/>			05/20/2008	High	C
<input type="checkbox"/>			05/12/2008	Urgent	Open
<input type="checkbox"/>			05/21/2008	Urgent	Open

Planned Activities

Due▲▲	Priority▲	Subject	Assigned To
05/12/2008	Urgent	Make initial contact with insured	Betty Baker
05/21/2008	Urgent	Special Investigation Claim Review	Rick Ralston
05/20/2008	High	Verify coverage	Betty Baker
05/20/2008	Normal	Get a statement from witness	Betty Baker

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Viewing Claim Activities Via the Calendar

The screenshot displays the 'Claim Calendar' application. At the top, a dropdown menu is set to 'Anyone (All Activities)'. Below it, the 'Assigned To' and 'Priority' filters are also set to 'Anyone (All Activities)'. The main calendar view shows a grid for May 2008. A red dashed box highlights the date May 20, which contains the activity '1 : Verify cover...'. A red arrow points from this box to a detailed view on the right, which shows the full details for the period May 19 - 25, 2008. This detailed view lists events for each day: Monday (No Events), Tuesday (Brittany Turner : Verify coverage), Wednesday (Brittany Turner : Special Investigation Claim Review), Thursday (No Events), Friday (No Events), Saturday (No Events), and Sunday (No Events). Another red dashed box highlights the date May 21, which contains the activity '1 : Special Inves...'. A red arrow points from this box to a detailed view at the bottom, which shows the full details for the period May 19 - 25, 2008, specifically for the date May 21, which contains the activity '1 : 000-00-000304 Brittany Turner'.

Claim Calendar

Assigned To : Anyone (All Activities)
Priority : Me (My Activities)
Jump To : May 2008

June 2008
26 27 28 29 30 31/1
2 3 4 5 6 7/8
9 10 11 12 13 14/15
16 17 18 19 20 21/22
23 24 25 26 27 28/29
30 1 2 3 4 5/6

July 2008
30 1 2 3 4 5/6
7 8 9 10 11 12/13
14 15 16 17 18 19/20
21 22 23 24 25 26/27
28 29 30 31 1 2/3

May 19 - 25, 2008

Mon, May 19, 2008
— No Events —

Tue, May 20, 2008
+ • [Brittany Turner : Verify coverage](#)

Wed, May 21, 2008
+ • [Brittany Turner : Special Investigation Claim Review](#)

Thu, May 22, 2008
— No Events —

Fri, May 23, 2008
— No Events —

Sat, May 24, 2008
— No Events —

Sun, May 25, 2008
— No Events —

20
[1 : Verify cover...](#)

1 : 000-00-000304 Brittany Turner

1 : 000-00-000304 Brittany Turner

Filtering Activities in an Activity List

Workplan (1 - 6 of 6)

All activities

<input type="checkbox"/>			<u>Due</u>	<u>Priority</u>	<u>Status</u>	<u>Subject</u>
<input type="checkbox"/>			05/18/2008	Urgent	Open	Contact insured
<input type="checkbox"/>			05/21/2008	Urgent	Skipped (Isabel Harkin: 05/19/2008)	Make initial contact with claimant
<input type="checkbox"/>			05/21/2008	High	Open	Verify coverage
<input type="checkbox"/>			05/21/2008	High	Complete (Isabel Harkin: 05/19/2008)	Send claim

Workplan (1 - 3 of 3)

My open activities

<input type="checkbox"/>			<u>Due</u>	<u>Priority</u>	<u>Status</u>	<u>Subject</u>
<input type="checkbox"/>			05/18/2008	Urgent	Open	Contact insured
<input type="checkbox"/>			05/21/2008	High	Open	Verify coverage
<input type="checkbox"/>			06/18/2008	Normal	Open	20 day file review

Workplan (empty)

All open external activities

<input type="checkbox"/>	<input type="checkbox"/>	<u>Due</u>	<u>Priority</u>	<u>Status</u>	<u>Subject</u>	<u>Exposures</u>
<input type="checkbox"/>	<input type="checkbox"/>					

All open external activities

Searching for Activities

Search Activities

Specify at least one of the following

Claim #

Assigned To Group ☐

Include Child Groups ☐ Yes ☐ No

Assigned To User ☐

Created By ☐

External Owner ☐

Optional parameters

Status

Priority

Completed Late

Overdue Now

Pending Assignment

Description

Search For Date

☐ Since




☒ From

To

Subject ☒

☐ Contains

Search Results (1 - 4 of 4)

<input type="checkbox"/>		Subject	Claim	Insured	Due	Closed	Priority	Status	External	External Owner	Assigned To
<input type="checkbox"/>		Make initial contact with claimant	000-00-000103	Robert Farley	05/08/2008		Urgent	Open	No		Scott Arthur
<input type="checkbox"/>		Make initial contact with insured	000-00-000203	Allen Robertson	05/05/2008		Urgent	Open	No		Isabel Harkin
<input type="checkbox"/>		Contact insured	000-00-000505	Allen Robertson	05/18/2008		Urgent	Open	No		Isabel Harkin
<input type="checkbox"/>		Special Investigation Claim Review	000-00-000203	Allen Robertson	05/21/2008		Urgent	Open	No		Wesley Roosevelt

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- ▶ Working with Queued Activities**
- ▶ Working with Your Activities

Viewing Queued Activities

Desktop Search Address Book Claim Vacation Go to (Alt+)

Actions

Activities (0)
Claims (0)
Exposures (0)
Queues (3)
Calendar
Bulk Invoices

Queued Activities (1 - 3 of 3)

Salvage Actions - Western Salvage Unit (3) Assign Next In Queue To Me Refresh

★	📅	Queued	Due	Priority	Subject	Claim △	Insured
		05/14/2008	05/06/2008	Normal	Salvage Vehicle	000-00-000103	Robert Farley
		05/14/2008	05/06/2008	Normal	Vehicle salvage opportunity	000-00-000203	Allen Robertson
		05/14/2008	02/06/2008	Normal	Salvage Vehicle	235-53-373906	Larry Gamney

- ▶ Activities assigned to queues that you have access to can be viewed by clicking the Queues page link on the Desktop tab

Taking Ownership of a Queued Activity

Queued Activities (1 - 3 of 3)

Salvage Actions - Western Salvage Unit (3)

Assign Next In Queue To Me

Refresh

		<u>Queued</u> ▲	<u>Due</u> ▲▲	<u>Priority</u>	<u>Subject</u>	<u>Claim</u>	<u>Insured</u>
		05/14/2008	05/06/2008	Normal	<u>Vehicle salvage opportunity</u>	<u>000-00-000203</u>	<u>Allen Robertson</u>
		05/14/2008	02/06/2008	Normal	<u>Salvage Vehicle</u>	<u>235-53-373906</u>	<u>Larry Gamney</u>
		05/14/2008	05/06/2008	Normal	<u>Salvage Vehicle</u>	<u>000-00-000103</u>	<u>Robert Farley</u>

Activities (1 - 1 of 1)

My activities today

Assign

Skip

Complete

Approve

Reject

<input type="checkbox"/>			Due	Priority	Subject	Claim	Insured
<input type="checkbox"/>			05/06/2008	Normal	Vehicle salvage opportunity	000-00-000203	Allen Robertson

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Viewing Your Activities Via Desktop List

The screenshot shows the Guidewire desktop interface. At the top, there are tabs for Desktop, Search, Address Book, Claim, and Vacation. Below these is a sidebar with a list of activities: Activities (6), Claims (2), Exposures (0), Queues (0), Calendar, and Bulk Invoices. The main area displays a table of activities. The table has columns for checkboxes, stars, due dates, priorities, subjects, claims, and insured names. The activity 'Make initial contact with insured' is highlighted with a red box, and a red arrow points from it to the text 'navigate to claim and activity'.

			Due	Priority	Subject	Claim	Insured
<input type="checkbox"/>	★		05/12/2008	Urgent	Make initial contact with insured	000-00-000304	Brittany Turner
<input type="checkbox"/>	★		05/20/2008	Urgent	Verify coverage	000-00-000304	Brittany Turner
<input type="checkbox"/>	★		05/21/2008	Urgent	Make initial contact with insured	000-00-000508	Larry Gamney
<input type="checkbox"/>			05/20/2008	Normal	Get a statement from witness	000-00-000304	Brittany Turner
<input type="checkbox"/>	★		06/18/2008	Normal	30 day diary	000-00-000304	Brittany Turner
<input type="checkbox"/>			06/19/2008	Normal	30 day diary	000-00-000508	Larry Gamney

- ▶ Clicking activity subject:
 - Displays associated claim in screen area
 - Opens activity in workspace frame

navigate to claim and activity

View Your Activities Via Desktop Calendar

Desktop | Search | Address Book | Claim | Vacation

Calendar

Show: All Activities | Activity Type: All Activity Type | Priority: All Priorities | Jump To: May 2008

Activities (7)
Claims (2)
Exposures (0)
Queues (0)
Calendar
Bulk Invoices

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
April 28	29	30	May 1	2	3/4
5	6	7	8	9	10/11
12	13	14	15	16	17/18
19	20 1: Verify cover...	21 2: Contact insur...	22 2: Reservation r...	23	24/25
26	27	28	29	30	31/June 1

1: 000-00-000304 Brittany Turner 2: 000-00-000508 Larry Gamney

May 20 - 26, 2008

Tue, May 20, 2008
• [Brittany Turner : Verify coverage](#)
Claim # 000-00-000304
Insured Brittany Turner

Wed, May 21, 2008
+ • [Larry Gamney : Contact insured](#)

Thu, May 22, 2008
+ • [Larry Gamney : Reservation rights letter](#)

Fri, May 23, 2008
-- No Events --

Sat, May 24, 2008
-- No Events --

Sun, May 25, 2008
-- No Events --

Mon, May 26, 2008
-- No Events --

22
2: Reservation r...

1: 000-00-000304 Brittany Turner 2: 000-00-000508 Larry Gamney

Editing Your Activities

Activity

Activity Detail for Claim 000-00-000508

Update **Complete** **Skip** **Assign** **Link Document** **Cancel** **View Notes**

Details

Subject ★

Description

Related To

Due Date ★

Escalation Date

Priority ★

Calendar Importance ★

Mandatory

Status

Externally Owned ★ ☐ Yes ☒ No

External Owner

Documents

New Note

Topic

Security Type

Subject

Related To

Confidential ☐ Yes ☒ No

Text

Activity Assignment

Assigned To

Reassigning Your Activities

Activity

Activity Detail for Claim 000-00-000304

Update | Complete | Skip | **Assign** | Link Document | Cancel | View Notes

Assign Activities ([Return to Workplan](#))

Cancel

Select how you would like to do the assignment

☒ Select from list: Use automated assignment Assign

☐ Find a user, group, or queue:

Search For	User	Location	
Last Name	<input type="text"/>	City	<input type="text"/>
First Name	<input type="text"/>	State	<none se
User name	<input type="text"/>	ZIP Code-..
Group Name	<none selected>	Country	<none se
Role	<none selected>		
Attribute Name	<none selected>		

Search Reset

Closing Your Activities

Activity

Activity Detail for Claim 000-00-000304

Workplan (1 - 10 of 10)

<input type="checkbox"/>			<u>Due</u> ▲	<u>Priority</u>	<u>Status</u>	<u>Subject</u>
<input type="checkbox"/>			05/12/2008	Urgent	Open	Make initial contact with insured
<input type="checkbox"/>			05/14/2008	Normal	Skipped (Betty Baker: 05/19/2008)	Get a statement from witness
<input type="checkbox"/>			05/20/2008	High	Complete (Betty Baker: 05/19/2008)	Verify coverage

Creating an Activity Note



Activity

Activity Detail for Claim 000-00-000203

Details
Subject *
Description
Related To

Documents

Name	View	Type	Status	Author	Date Modified
------	------	------	--------	--------	---------------

New Note
Topic
Security Type
Subject
Related To
Confidential ☐ Yes ☒ No
Text

Vehicle was not drivable. Insured left it in parking lot of a nearby shopping center and obtained permission to leave it there for 24 hours. However, the vehicle was erroneously towed to an impound yard. Insured is in contact with the shopping center to get vehicle released.

☐ Yes ☒ No

Vehicle was not drivable. Insured left it in parking lot of a nearby shopping center and obtained permission to leave it there for 24 hours. However, the vehicle was erroneously towed to an impound yard. Insured is in contact with the shopping center to get vehicle released.

Viewing the Notes for a Given Activity

Activity Detail for Claim 000-00-000203

[Update](#) | [Complete](#) | [Skip](#) | [Assign](#) | [Link Document](#) | [Cancel](#) | [View Notes](#)

Activity Notes

Find Text:

Author:

Related To:

Topic:

[Search](#) [Reset](#)

Date Range: ☒ Since
☐ From To

Sort By:
☐ Ascending
☒ Descending

Notes (1 - 2 of 2)

Edit Delete Print Author Jill Randolph Topic Salvage Related To (1) 1st Party Vehicle - Allen Robertson	May 20, 2008 Vehicle released from impound yard Insured has secured release of vehicle from impound yard. The impound yard has been added to the claim file along with its address, and the towing service which moves the car to the scrap yard should pick up the vehicle from this address.	10:37 AM
Edit Delete Print Author Jill Randolph Topic Salvage Related To (1) 1st Party Vehicle - Allen Robertson	May 20, 2008 Vehicle in impound yard Vehicle was not drivable. Insured left it in parking lot of a nearby shopping center and obtained permission to leave it there for 24 hours. However, the vehicle was erroneously towed to an impound yard. Insured is in contact with the shopping center to get vehicle released.	10:28 AM

Lesson Objectives Review

You should now be able to:

- Describe the functionality of activities
- Create activity patterns
- Create activities
- Review activities associated to a claim
- Take ownership of queued activities
- Edit and complete activities assigned to you

Review Questions

1. Every activity is associated to a claim. What are the three sub-objects that an activity could optionally be associated to?
2. What is an activity pattern?
3. What do the following mean?
 - a) An activity in a list has a star icon in the first column.
 - b) An activity in a list has an activity-with-clock icon in the second column.
 - c) An activity in a list has a due date in red.
4. Name one similarity and one difference between the Desktop Activities list and a claim's Workplan list.
5. What are the two ways an activity can be closed? What is the difference between the two?

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