

Notes

Lesson Objectives

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

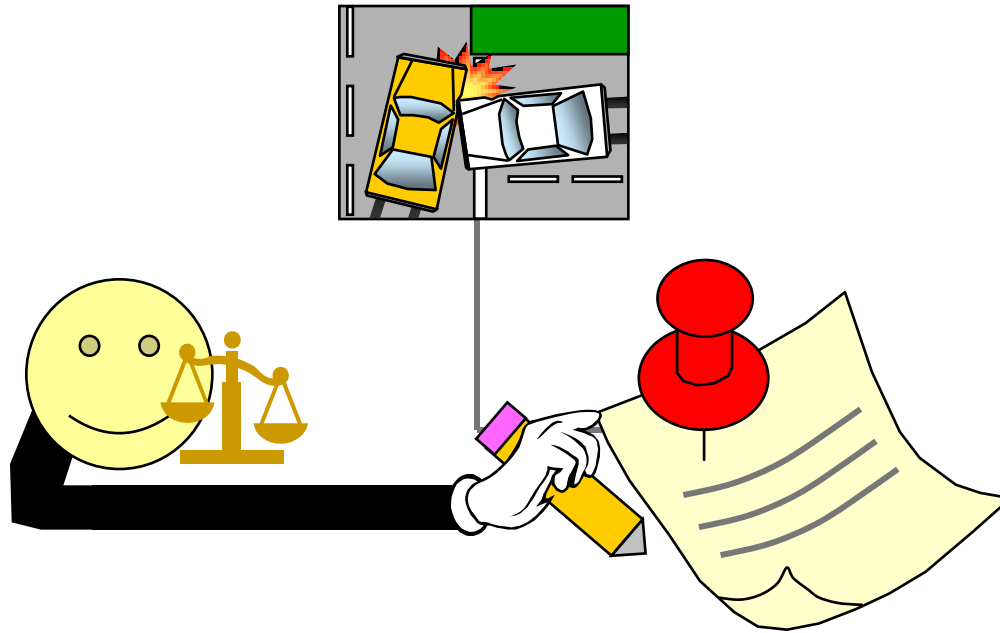
- Describe the functionality of notes
- Work with notes

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

- ▶ Notes Basics
- ▶ Working with Notes

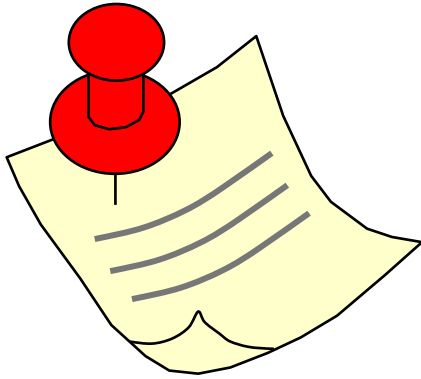
Notes



Claimant reported that the driver was a teenage boy, so there may be a question of coverage.

- ▶ A note is a detailed record of the actions or thinking behind the processing of a claim
 - Notes are typically created by users

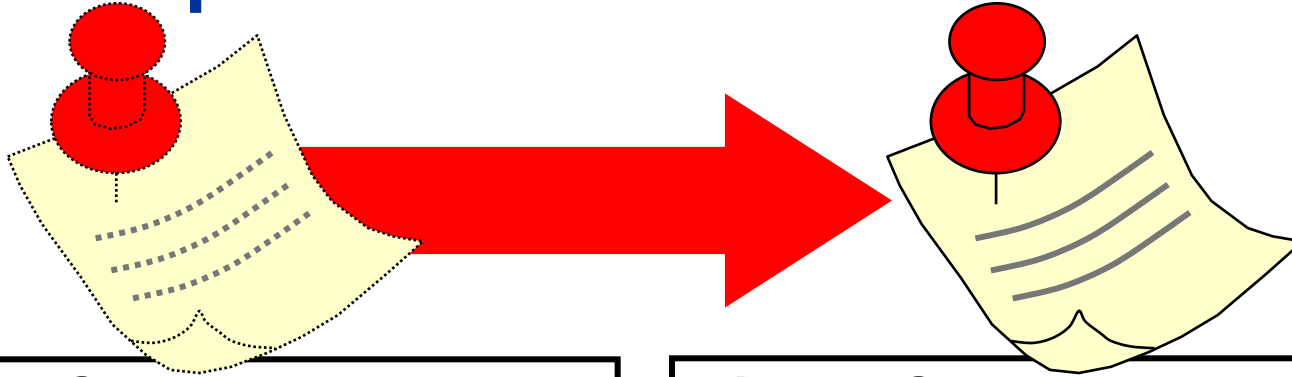
Note Fields



Topic:	Coverage
Subject:	Coverage in question
Related To:	Entire claim
Confidential:	No
Text:	Claimant reported...

- ▶ Topic - the general category of the note
- ▶ Subject - a short description of the note content
- ▶ Related To object - whether the note is appropriate to the entire claim or to a particular exposure or contact
- ▶ Confidential - whether the note is visible to everyone or to only you, your supervisors, and people with permission to view confidential notes
- ▶ Text - the text of the note itself

Note Templates



Witness Statement Template

Topic: Investigation

Text:

When did it occur?

Where did it occur?

Witness Statement Note

Topic: Investigation

Text:

When did it occur?

October 7 at 2:35 pm

Where did it occur?

The corner of 5th and Main

- ▶ A note template is a template for commonly created notes
 - A user can create a note using a template, which will automatically set the topic, set the subject, and/or add text to the text field

Lesson Outline

- ▶ Notes Basics
- ▶ Working with Notes

Viewing Notes

Desktop Search Address Book Claim (235-53-373870) Vacation Go to (Alt+)

Pol: 53-263535 | Ins: Mark Henderson | DoL: 01/26/2008 | St: Open | Adj: Betty Baker (Auto1 - TeamA)

Actions

- Summary
- Workplan
- Loss Details
- Exposures
- Parties Involved
- Policy
- Financials
- Notes**
- Documents
- Plan of Action
- Litigation
- History
- Calendar

Notes

Find Text:

Author:

Related To:

Topic:

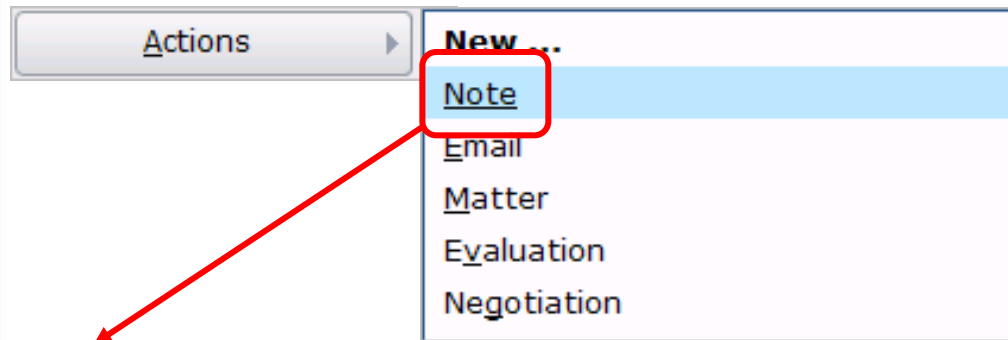
Date Range: ☒ Since ☐ From To

Sort By: ☐ Ascending ☒ Descending

Notes (1 - 3 of 3)

Edit Delete Print	Jan 31, 2008 12:00 AM Initial phone call with claimant Spoke with the claimant. He was not admitted to the hospital, but was treated in the emergency room for bruised or broken ribs. I asked him to send medical reports and any bills to me while telling him that we are not accepting liability yet until we can gather more facts about the claim. He also said that he recalled the person driving the car was named Bill, not Mark.
Edit Delete Print	Jan 29, 2008 12:00 AM Phone call with insured driver Spoke to insured driver. He reported that the other party's car had suffered some damage and that although the other driver had not had any apparent injuries, he complained of non-specific pain and was taken from the scene of the accident by ambulance.

Adding Notes to a Claim



Note

Note

Topic *

Security Type

Subject

Related To *

Confidential *

Text *

Adding Notes via an Activity

Activity

Activity Detail for Claim 000-00-000203

[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

Remove	Name	View	Type	Status	Author	Date Modified
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New Note

Topic

Security Type

Subject

Related To

Confidential ☐ Yes ☒ No

Text

Activity Assignment

Assigned To Jill Randolph

Assigned Group Western Salvage Unit

Assigned By Jill Randolph

Assign Date 05/19/2008

Activity Tracking

Completion/Skipped date

Completed by

Recurring No

Using a Note Template

Note

Topic *

Security Type

Subject

Related To *

Confidential *

Text *

Find Note Template (Return to Note)

Topic

Type

Line of business

Keywords

	Template	Topic
<input type="button" value="Select"/>	Accident Report	Investigation
<input type="button" value="Select"/>	Status Report	General

Note

Topic *

Security Type

Subject

Related To *

Confidential *

Text *

Accident report by: Betty Baker

When did the accident occur?

Where did the accident occur?

Editing Notes

Notes

Find Text:

Author:

Related To:

Topic:

☒ Since

☐ From

To

Sort By:

Notes (1 - 1 of 1)

Edit Delete Print	May 21, 2008 01:28 PM
Author Betty Baker	Witness has nothing to report
Topic Investigation	Helen Nixon is listed as a witness to the accident. She works as a school crossing guard at the intersection where the accident took place. However, she reports that her back was turned away
Related To none (Claim-level)	

Edit Note ([Up to Notes](#))

Topic

Security Type

Subject

Related To

Confidential

Text Helen Nixon is listed as a witness to the accident. She works as a school crossing guard at the intersection where the accident took place. However, she reports that her back was turned away from the street when the accident happened, and she was not able to verify or refute any description of the accident.

Lesson Objectives Review

You should now be able to:

- Describe the functionality of notes
- Work with notes

Review Questions

For each of the following descriptions, identify if it is a description of activities, documents, and/or notes. Some descriptions apply to multiple types of objects.

1. It has an owner.
2. It involves integration to a third-party system.
3. In the base application, it has an attribute which, when selected, makes it viewable only by you, your supervisors, and people with the appropriate permissions.
4. You can specify that it pertains to the entire claim or to a single sub-object.
5. It has a MIME type.
6. It has a due date.
7. It can be created using a template.

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