

The New Claim Wizard

Lesson Objectives

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

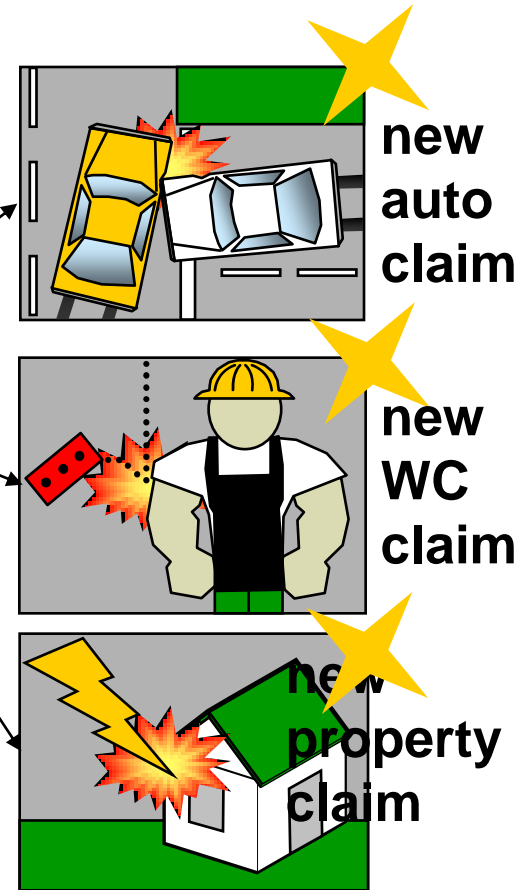
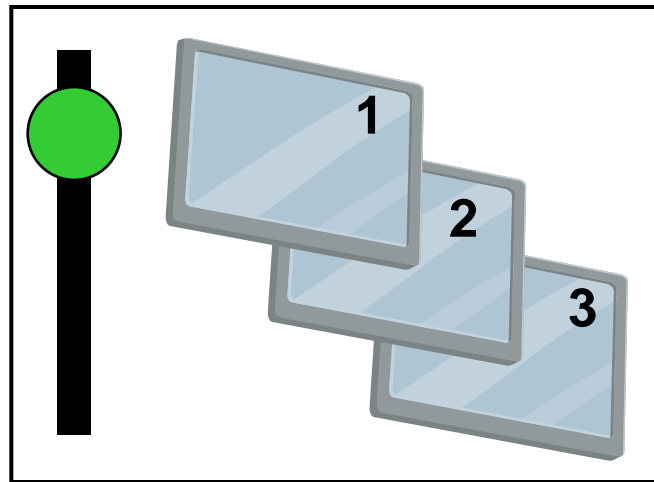
- Identify the general features of the new claim wizard
- Initiate the new claim wizard
- Identify the differences between the full claim wizard and the quick claim wizard
- Identify what happens if you leave the new claim wizard while the claim is incomplete

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

- ▶ The New Claim Wizard
- ▶ Initiating the New Claim Wizard
- ▶ Full Claims
- ▶ Quick Claims
- ▶ Incomplete Claims

The New Claim Wizard (NCW)



- ▶ A series of screens that guide users through manual creation of new claims
 - Incorporates multiple lines of business
 - Screens and flow are completely configurable

Variations Across Lines of Business

Step 3 of 5: Add claim information

Cancel | < Back | Next > | Finish




What Happened? City bus driver swerved to avoid hitting a pedestrian and rear-ended the insured


Date of Loss 03/24/2008 12:00 AM

Loss Cause * Collision with train or bus

Incident Only? ☐ Incident Only

Vehicles, People, & Property

 Add Vehicle  Add Pedestrian  Add Property Damage

 1996 Toyota Corolla

At the Scene

Witnesses | Add | Remove

<input type="checkbox"/> * Name	<input type="checkbox"/> * Statement Obtained	<input type="checkbox"/> Where was witness?
<input type="checkbox"/> Edna Kravitz	<input type="checkbox"/> No	<input type="checkbox"/> Pedestrian

Categorization

Fault Rating Other party at fault

Weather Clear

Catastrophe <none selected>

Special Claim Permission <none selected>

Step 3 of 8: Add claim information

Cancel | < Back | Next > | Finish

Claim Policy

Policy Number 23-502011

Policy Status In force

General

Line of Business * Property

Loss Type Property

Catastrophe <none selected>

Special Claim Permission <none selected>

Description

Improperly installed sprinkler leaked and damaged merchandise in storage and equipment

Loss Details

Loss Cause * Water damage

Fault Rating <none selected>

Date of Loss 03/24/2008 12:00 AM

Properties

Add | Remove

<input type="checkbox"/> Address	<input type="checkbox"/> City	<input type="checkbox"/> State
<input type="checkbox"/> 2103 Veterans Pkwy.	<input type="checkbox"/> Bloomington	<input type="checkbox"/> Illinois

Two Levels of Depth

The image compares two levels of claim processing depth. The top interface, 'Step 5 of 5: Save and Assign Claim', is a 'Full wizard' that captures a greater amount of information. It includes a sidebar with a 'New Claim Wizard' menu where 'Save & Assign Claim' is highlighted. The main area shows 'Assignment' options with dropdowns for 'Use automated assignment'. The bottom interface, 'Step 2 of 2: Quick Claim Auto', is a 'Quick wizard' that can be done more rapidly. It has a sidebar where 'Quick Claim Auto' is highlighted. The main area shows 'Reported By' information (Name: Ray Newton, Relation to Insured: Self), 'Claim Policy' details (Policy Number: 54-123456, Policy Status: In force), and 'General' information (Line of Business: Auto, Loss Type: Auto). A red arrow points from the 'Quick Claim Auto' option in the bottom sidebar to the 'Full wizard' interface, indicating a transition or comparison.

Full wizard captures greater amount of information

Quick wizard can be done more rapidly

Two Sets of Wizard Steps

ordered

The screenshot displays the 'New Claim Wizard' interface. On the left is a sidebar with a tree view of steps. The 'Loss Details' section is highlighted with a red box and a red arrow pointing to it from the word 'ordered' above. Below it, the 'Parties Involved' section is also highlighted with a red box and a red arrow pointing to it from the word 'independent' below. The main area shows 'Step 3 of 5: Add claim information'. It includes navigation buttons (Cancel, < Back, Next >, Finish) and a text area for 'What Happened?'. Below that are fields for 'Date of Loss' (03/24/2008 12:00 AM), 'Loss Cause' (a dropdown menu showing '<none selected>'), and 'Incident Only?' (a checkbox). A section titled 'Vehicles, People, & Property' contains buttons for 'Add Vehicle', 'Add Pedestrian', and 'Add Property Damage'. Under 'Add Vehicle', there is a car icon and the text '1997 Saturn SL' with a dropdown arrow.

independent

Step-By-Step Validation

The screenshot displays a web-based 'New Claim Wizard' interface. On the left is a sidebar with an 'Actions' menu and a list of steps: 'Find Policy', 'Basic Info' (highlighted with a green dot), 'Loss Details', 'Services', and 'Save & Assign Claim'. Below these are sections for 'Parties Involved' and 'Policy'. The main content area is titled 'Step 2 of 5: Basic information'. At the top of this area is a yellow banner with a red arrow icon and the text 'Name : Missing required field "Name"'. Below the banner are three buttons: 'Cancel', '< Back', and 'Next >'. The form contains several fields: 'How Reported' with a dropdown menu showing 'Phone'; 'Name' with a dropdown menu showing '<none selected>' and a red asterisk icon to its left; 'Relation to Insured' with a dropdown menu showing 'Self' and a red asterisk icon to its left; and 'Date of Notice' with a text input showing '03/27/2008' and a calendar icon. At the bottom of the form, the word 'Insured' is partially visible.

- ▶ Wizard steps can execute validation logic to prevent users from moving from a given step if the data on that step is invalid

Completing the Wizard

The image displays three overlapping screenshots of the 'New Claim Wizard' interface, illustrating the final steps of the claim creation process. Each screenshot shows a sidebar with navigation links: 'Find Policy', 'Basic Info', 'Loss Details', 'Services', and 'Save & Assign Claim'. The main content area shows the current step, with the 'Finish' button highlighted by a red box in each case.

- Step 3 of 5: Add claim information**
Buttons: Cancel, < Back, Next >, **Finish**
Fields: What Happened? (text area), Date of Loss (03/24/2008 12:00 AM), Loss Cause (Theft of entire vehicle)
- Step 4 of 5: Services**
Buttons: Cancel, < Back, Next >, **Finish**
Section: Covered Vehicles
List: 1997 Saturn SL (with car icon)
- Step 5 of 5: Save and Assign Claim**
Buttons: Cancel, < Back, **Finish**
Section: Assignment
Radio button: Assign Claim To (selected), Use automated ass...

Red arrows originate from the 'Finish' buttons in Steps 3, 4, and 5, pointing towards a final success message box on the right.

- ▶ User can complete the claim and exit the wizard without visiting every step

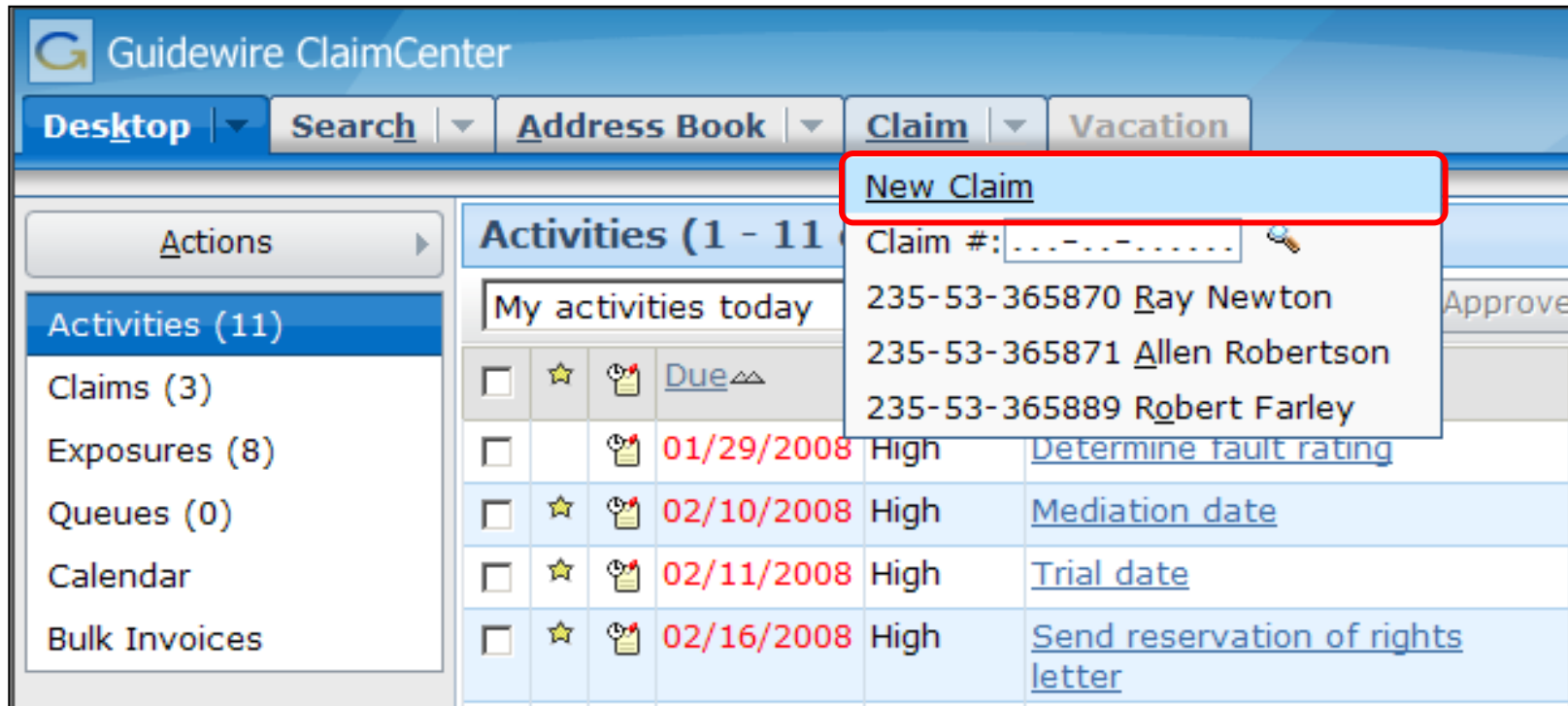
New Claim Saved

Claim 000-00-000403 has been successfully saved.

Lesson Outline

- ▶ The New Claim Wizard
- ▶ Initiating the New Claim Wizard
- ▶ Full Claims
- ▶ Quick Claims
- ▶ Incomplete Claims

Initiating the New Claim Wizard



- ▶ Initiated through a widget
 - In the base application, a menu item in the Claim tab menu

Identifying the Policy

Actions ▸

New Claim Wizard

- Find Policy**
- Basic Info
- Loss Details
- Services
- Save & Assign Claim

Parties Involved

- Policy
- Policy General
- Policy Details
- Documents
- Notes

Step 1 of 5: Search or Create Policy

☒ Find Policy ☐ Create Unverified Policy

Policy #

First Name

Last Name

Organization Name

Policy Type

Loss Date

SSN or Tax ID

City

State

Zip Code

Country

VIN

	Policy #	Insured	Address	City
<input type="button" value="Unselect"/>	54-123456	Ray Newton	287 Kensington Rd. #1A	South Pasad

New Claim

Date of Loss ★

Time

Type of Claim ★ ☒ Auto

☐ Auto - Auto First and Final

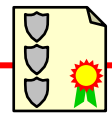
☐ Auto - Quick Claim Auto

Claims History

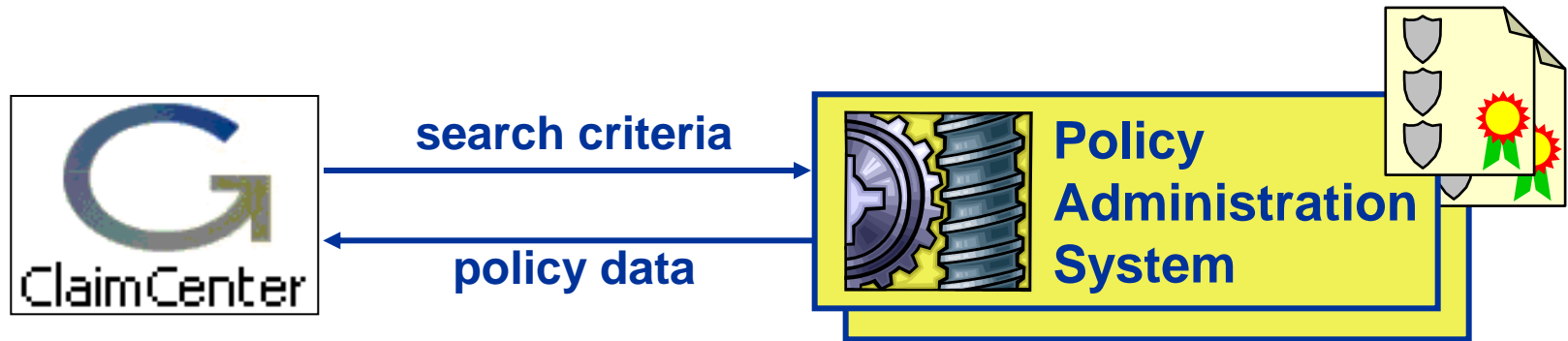
Status	Claim
Open	235-53-365870



**Policy
Admin.
System**



Policy Administration System Integration



- ▶ Every instance of ClaimCenter has an integration point to a policy administration system, such as PolicyCenter
 - This application stores information about:
 - Policies issued by the carrier
 - Coverages on each policy
 - People or assets covered by those coverages

Identifying the Loss Date

- ▶ Determines which version of the policy to retrieve
- ▶ Used for potential duplicate claims search

Step 1 of 5: Search or Create Policy

☒ Find Policy ☐ Create Unverified Policy

Policy #

First Name

Last Name

Organization Name

Policy Type

Loss Date

	Policy #	Insured	Address
<input type="button" value="Unselect"/>	54-123456	Ray Newton	287 Ker

New Claim

Date of Loss ★

Time

Type of Claim ★ ☒ Auto
☐ Auto - Auto First and Fir
☐ Auto - Quick Claim Auto

Date:

Su	Mo	Tu	We	Th	Fr	Sa
						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					

Choosing the Wizard Type

Step 1 of 5: Search or Create Policy

|

☒ Find Policy ☐ Create Unverified Policy

Policy #

First Name

Last Name

Organization Name

Policy Type

Loss Date

	Policy #	Insured	Address
<input type="button" value="Unselect"/>	54-123456	Ray Newton	287 Kensington

New Claim

Date of Loss ★

Time

Type of Claim ★ ☒ Auto ☐ Auto - Auto First and Final ☐ Auto - Quick Claim Auto

New Claim Wizard

[Find Policy](#)

[Basic Info](#)

[Loss Details](#)

[Services](#)

☒ **Save & Assign Claim**

New Claim Wizard

[Find Policy](#)

☒ **Auto First and Final**

New Claim Wizard

[Find Policy](#)

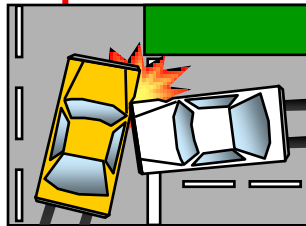
☒ **Quick Claim Auto**

Lesson Outline

- ▶ The New Claim Wizard
- ▶ Initiating the New Claim Wizard
- ▶ **Full Claims**
- ▶ Quick Claims
- ▶ Incomplete Claims

Temporary Claim Number Generation

Step 1 of 5: Search or Create Policy



999-99-991109
**(temporary
number)**

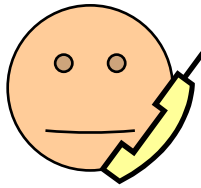


- ▶ Generated after first step
- ▶ Used to track claim in draft status
- ▶ Typically not displayed

Step 2 of 5: Basic information

|

Identifying Primary Contact and Involved Vehicle



Actions ▾

New Claim Wizard

- [Find Policy](#)
- Basic Info**
- [Loss Details](#)
- [Services](#)
- [Save & Assign Claim](#)

Parties Involved

- Policy**
- [Policy General](#)
- [Policy Details](#)
- Documents**
- Notes**

Step 2 of 5: Basic information

[Cancel](#) | [≤ Back](#) | [Next ≥](#)

Reported By

How Reported:

Name: *

Relation to Insured *:

Date of Notice:

Insured

Name: [Ray Newton](#)

Address: 287 Kensington Rd. #1A, South Pasadena, CA 91145

Primary Phone: 818-446-1206

Main Contact

Same Person? ☒ Same as reporter ☐ Different person

Involved Vehicle(s)

☒ **1996 Toyota Corolla (2GDH967 / California)**

Collision	500.00 usd Deductible; 10000.00 usd Limit
Comprehensive	500.00 usd Deductible; 5000.00 usd Limit
Liability - Auto bodily injury	75000.00 usd/150000.00 usd Limit
Liability - Property damage	75000.00 usd Limit
Medical payments	500.00 usd Limit

☐ **1997 Saturn SL (1HGJ465 / California)**

- ▶ Primary contact data captured immediately after initial wizard information is known (in case conversation is interrupted)
- ▶ Involved vehicle data captured as first incident on claim

The Possible Duplicate Claims Warning

Guidewire ClaimCenter

Unsaved Work | Help | About | Log Out

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

Pol: 54-123456 | Ins: Ray Newton | DoL: 01/26/2008

Step 2 of 5: Basic Info

Cancel | < Back

Reported By: How Reported: Name: Relation:

Duplicate Claims

Loss Details: (Return to Possible Duplicate Claims)

General

Loss Type: Auto

Line of Business: Auto

Primary Adjuster: Andy Applegate

Primary Group: Auto1 - TeamA

Catastrophe

Claim Segment: Auto - mid complexity

Claim Strategy: Auto - Fast Track

Special Claim Permission

Description: Insured hit other party's car on the front passenger side while making a left turn.

Vehicles

Make	Model	Plate	Status
Mazda	626	7FDG745	Ca
Saturn	SL	1HGJ465	Ca

Properties

Address

Injuries

Name	Severity	Description
------	----------	-------------

Possible Duplicate Claims

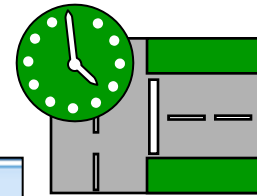
► Possible duplicate claims found. Please examine the possible duplicates listed below. If the new claim you are creating is a duplicate you can safely cancel out of the wizard by clicking the cancel button

Refresh Close

Possible duplicate claims found. Please examine the possible duplicates listed below.

Claim	Insured	Policy	Claimant	Loss Date	Adjuster	Status
235-53-365870	Ray Newton	54-123456		01/26/2008	Andy Applegate	Open

Identifying Details About the Loss Event



Actions

New Claim Wizard

- [Find Policy](#)
- [Basic Info](#)
- Loss Details**
- [Services](#)
- [Save & Assign Claim](#)

Parties Involved

- [Policy](#)
- [Policy General](#)
- [Policy Details](#)

Documents

- [Notes](#)

Step 3 of 5: Add claim information

[Cancel](#) | [< Back](#) | [Next >](#) | [Finish](#)

What Happened?


Date of Loss

Loss Cause ★

Incident Only? ☐ Incident Only

Vehicles, People, & Property

[Add Vehicle](#) [Add Pedestrian](#) [Add Property Damage](#)

 [1996 Toyota Corolla](#)

- ▶ Captures information about loss occurrence and incidents (lost or damaged items)

Identifying Details About the Incidents



Vehicles, People, & Property

Add Vehicle Add Pedestrian Add Property Damage

1996 Toyota Corolla ▼

Vehicle Details ([Return to Step 3 of 5: Add claim information](#))

OK Cancel

Vehicle Basics

Loss Party ☒ Insured ☐ Third Party

Select vehicle ★ **1996 Toyota Corolla (2GDH** ▼

Was the vehicle stolen? ☐ Yes ☐ No

Was the vehicle parked? ☐ Yes ☐ No

Damage

Damage Description **Rear bumper is crumpled. Windshield and headlights were shattered.**

Possible Total Loss? ☐ Yes ☐ No [Calculate](#)

Total Loss Points

Operable? ☐ Yes ☐ No

Airbags Deployed? ☐ Yes ☐ No

Equipment Failure? ☐ Yes ☐ No

Occupants and Injuries

Add Passenger | [Remove](#)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name/Position	Injuries
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Ray Newton driver	Windshield shattered and glass shard made 1-inch cut on insured's right arm

Service Needed

☐ Rental

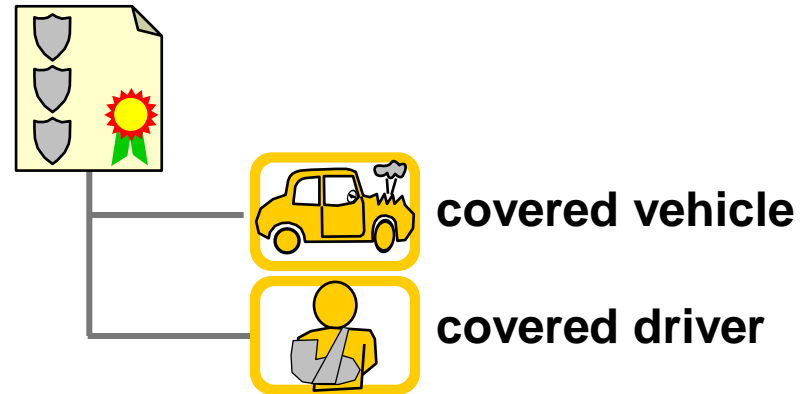
☐ Towing

☐ Appraisal

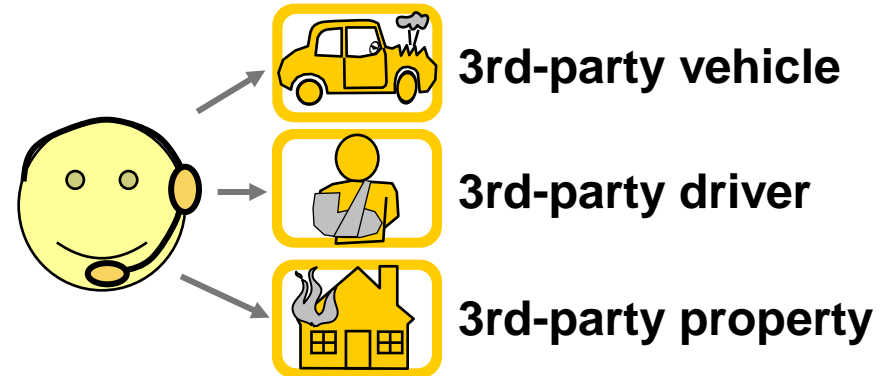
☐ Autobody Repair Shop

Where Can Incident Information Come From?

- ▶ From the policy administration system



- ▶ From the user creating the claim



- ▶ From the adjuster during discovery/investigation



Services

Actions ▶

New Claim Wizard

- [Find Policy](#)
- [Basic Info](#)
- [Loss Details](#)
- Services**
- [Save & Assign Claim](#)


Parties Involved

- Policy
- Policy General
- Policy Details
- Documents
- Notes

Step 4 of 5: Services

Cancel | < Back | Next > | Finish

Covered Vehicles

 **1996 Toyota Corolla**
Rear bumper is crumpled. Windshield and headlights were shattered.

☐ **Rental**

☐ **Towing**

☒ **Appraisal**

Assessor: Edward Barrowman

When to Inspect: 03/31/2008 12:30 PM

Vehicle location for inspection

Different from Insured's address? ☐ Yes ☒ No

Vehicle Address: 287 Kensington Rd. #1A, So

☒ **Autobody Repair Shop**

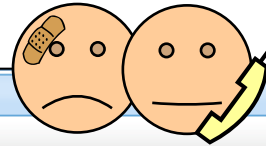
Collision Coverage: 500 Deductible

Repair Shop: Jose & Juan-Carlos Repairs

Repair Shop Phone: 312-773-9263

- ▶ Services step helps improve customer relationships by:
 - Offering or capturing information about additional needs the insured may have
 - Controlling damage
 - Saving money

Independent Steps



- Parties Involved
- Policy
- Policy General
- Policy Details
- Documents
- Notes

Parties Involved

< Back

Add any additional parties involved with this claim and their role in the claim below.

All

<input type="checkbox"/> Name^	Roles	Contact Prohibited?	Phone
<input type="checkbox"/> Jose & Juan-Carlos Repairs	Repair Shop	No	312-773-9263
<input type="checkbox"/> Edward Barrowman	Primary Agent		
<input type="checkbox"/> Karen Egertson	Agent		
<input type="checkbox"/> Brian Newton	Excluded Party		
<input type="checkbox"/> Ray Newton	Insured, Mail Contact, Registered Driver, Injured Party		
<input type="checkbox"/> Stan Newton	Covered Party		



Policy Details

< Back

Review the details of this policy

Vehicles (1 - 2 of 2)

<input type="checkbox"/>	#^	Make	Model	Year	VIN
<input type="checkbox"/>	1	Saturn	SL	1997	1GV234TV347463345
<input type="checkbox"/>	2	Toyota	Corolla	1996	3DGF78575GD892534

Endorsements (1 - 3 of 3)

<input type="checkbox"/>	#^	Description
<input type="checkbox"/>	PP 03 03	Towing and Labor Costs Coverage

Documents

< Back

Review the documents for this claim.

Name	Actions
RTD Contact In	



Notes

[Edit](#) [Print](#)

Author	Andy Applegate	Mar 27, 2008 12:42 PM
Topic	Coverage	Question about rental coverage
Related To	none (Claim-level)	Insured thought the policy automatically included a rental reimbursement, but the policy as returned from the policy system shows no rental coverage.



Finishing the Claim

Step 3 of 5: Add claim information

Step 4 of 5: Services

Finish

Step 5 of 5: Save and Assign Claim

Finish

Cancel

< Back

Finish

Automated Claim Setup

Segment
claim

Assign
claim

Create and
assign
activities

Validate
claim

New Claim Saved

Claim 000-00-000038 has been successfully saved.

Assigned Group: Auto1 - TeamA

Assigned User: Andy Applegate

FNOL Snapshot

Pol: 54-123456 | Ins: Ray Newton | DoL: 09/18/2009 | St: Open | Adj: Andy Applegate (Auto1 - T

Actions

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

Snapshot: Loss Details

Loss Details | Parties Involved | Policy | Exposures | Notes | Documents | Additional

General	
Line of Business	Auto
Loss Type	Auto
Catastrophe	
Special Claim Permission	

Description

Loss Details	
Loss Cause	Collision with motor vehicle
Fault Rating	
Date of Loss	09/18/2009 12:00 AM
Weather	
In Course of Employment?	

Notification and Contact

Reported By	Ray Newton
Main Contact	Ray Newton

Loss Location

Location

Address Type

Valid until

Location Code

Jurisdiction State

Vehicles

Make	Model
Toyota	Corolla

Properties

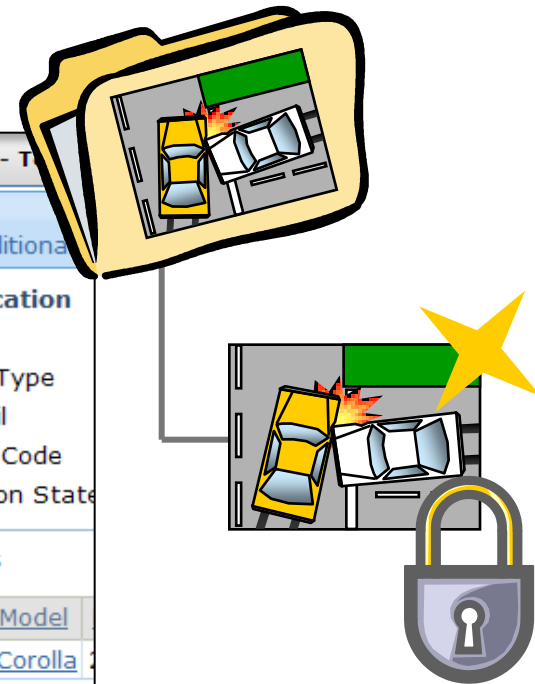
Address

Injuries

Injuries

Officials

Type



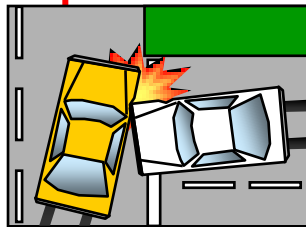
- ▶ A read-only view of data reported during intake which is added to the claim file once new claim is complete
 - Useful during adjudication to verify what was reported during first notice

Lesson Outline

- ▶ The New Claim Wizard
- ▶ Initiating the New Claim Wizard
- ▶ Full Claims
- ▶ **Quick Claims**
- ▶ Incomplete Claims

Temporary Claim Number Generation

Step 1 of 5: Search or Create Policy



999-99-991109
**(temporary
number)**

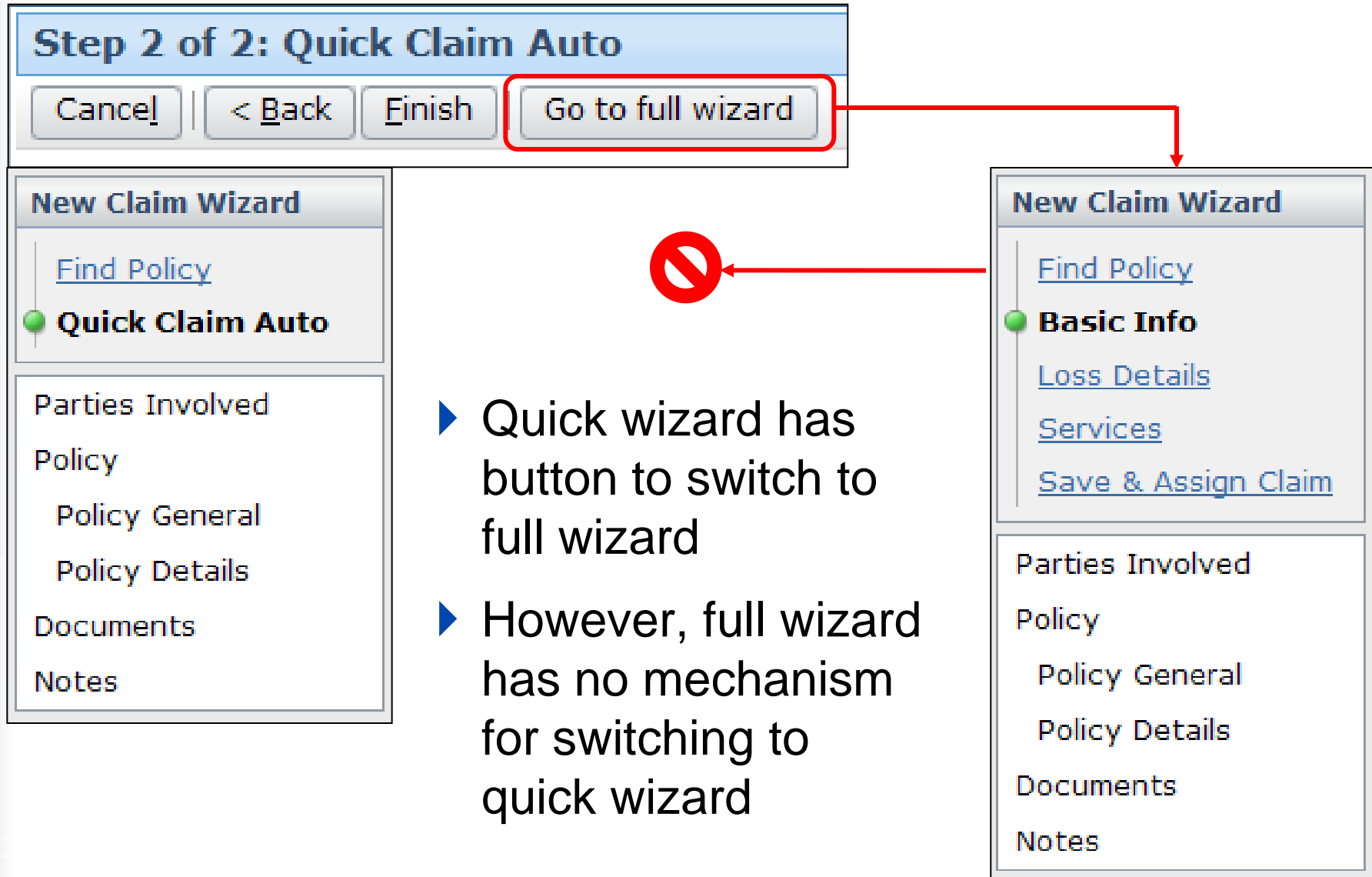


- ▶ Like full wizard claims, generated for quick wizard claims after the first step

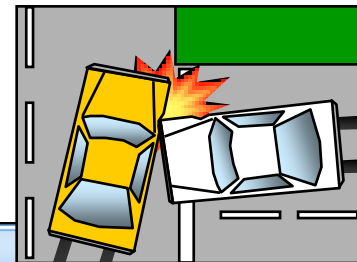
Step 2 of 2: Quick Claim Auto

| | |

Moving Between Wizards



Quick Claim Wizard Example: Auto



Step 2 of 2: Quick Claim Auto
[Cancel](#) | [< Back](#) | [Finish](#) | [Go to full wizard](#)

Reported By
Name *
Relation to Insured *
Primary Phone
Address
Claim Policy
Policy Number 54-123456
Policy Status In force

General
Line of Business *
Loss Type Auto

Description

Loss Details
Loss Cause *
Fault Rating
Date of Loss 02/28/2008 12:00 AM
Date of Notice *
Incident Only? * ☐ Yes ☒ No
Coverage in Question? ☐ Yes ☐ No

Location
Location
Address 1
Address 2
City *
County
State *
Zip Code
Country
Location Code
Jurisdiction State

Vehicles
[Add](#) [Remove](#)

Make	Model	Plate	State	Loss Party	Driver
------	-------	-------	-------	------------	--------


Claim Assignment
Assign claim and all exposures to:

Quick Claim Duplicate Warning

Actions ▶

New Claim Wizard

[Find Policy](#)

 Quick Claim Auto

Parties Involved

Policy

Step 2 of 2: Quick Claim Auto

Cancel | < Back | Finish | Go to full wizard

Reported By

Name * Ray Newton ▼

Relation to Insured * Self ▼

Primary Phone 818-446-1206

Address 287 Kensington Rd. #1A, South Pasadena, CA 91145

Claim Policy


Duplicate Claims

Possible Duplicate Claims

▶ Possible duplicate claims found. Please examine the possible duplicates listed below. If the new claim you are creating is a duplicate you can safely cancel out of the wizard by clicking the cancel button

Refresh Close

Possible duplicate claims found. Please examine the possible duplicates listed below.

 ▲	Claim	Insured	Policy	Claimant	Loss Date	Adjuster	Status
	000-00-000045	Ray Newton	54-123456		02/28/2008	Thomas Sanders	Open

- ▶ For quick wizard, check is executed at end of wizard

Lesson Outline

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Cancelling a New Claim

Step 3 of 5: Add claim information

Cancel < Back Next > Finish

Windows Internet Explorer

Do you really want to cancel this claim?
The claim will be permanently deleted and you will not be able to resume it in the future.
Click OK to delete the claim or Cancel to return to the wizard.

OK Cancel

Guidewire ClaimCenter

Desktop Search Address Book Claim Vacation

Actions

Activities (13)

- Claims (4)
- Exposures (8)
- Queues (0)
- Calendar
- Bulk Invoices

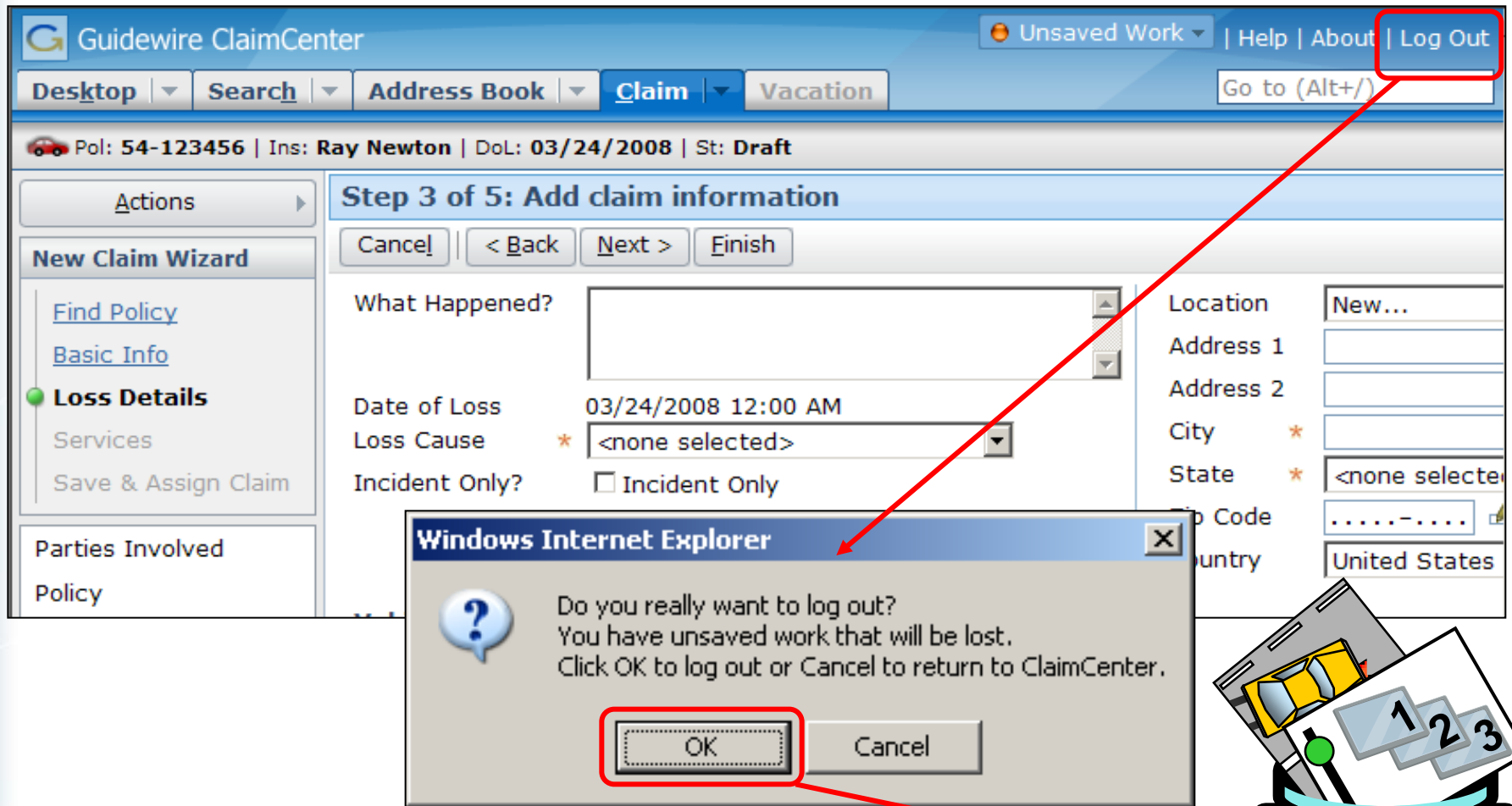
Activities (1 - 11 of 11)

My activities today Assign Skip Complete App

<input type="checkbox"/>	★	📅	Due	Priority	Subject
<input type="checkbox"/>	★	📅	01/29/2008	High	Determine fault rating
<input type="checkbox"/>	★	📅	02/10/2008	High	Mediation date
<input type="checkbox"/>	★	📅	02/11/2008	High	Trial date
<input type="checkbox"/>	★	📅	02/16/2008	High	Send reservation of rights letter



Logging Out During a New Claim



- ▶ Incomplete claim will be lost, just like all other unsaved work



Navigating Away from a New Claim

New
Claim
Wizard

The screenshot displays the Guidewire ClaimCenter interface. The top navigation bar includes 'Desktop', 'Search', 'Address Book', 'Claim', and 'Vacation'. The main content area shows 'Step 3 of 5: Add claim information' with fields for 'What Happened?' and 'Loca'. A red arrow points from the 'New Claim' link in the 'New Claim Wizard' sidebar to the 'New Claim' link in the 'Claim (000-00-000038)' dropdown menu. Below this, a red box highlights the 'New Claim' link in the dropdown menu, and another red box highlights the 'Summary' link in the 'Actions' menu. A red arrow points from the 'Summary' link to the 'Summary' tab in the 'Summary' section of the existing claim.

New Claim Wizard

Claim (000-00-000038)

Summary

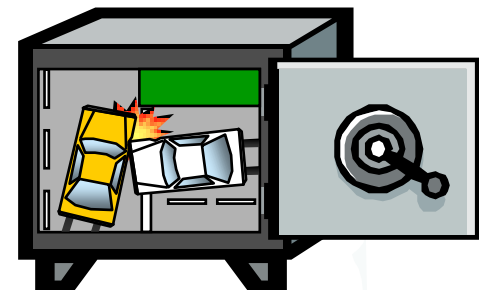
Loss Date	Notice Date	Loss Location	Description
03/24/2008 12:00 AM	03/27/2008	287 Kensington Rd. #1A, South Pasadena, CA 91145	City bus driver swerved to avoid hitting a pedestrian and rear-ended the insured

#	Type	Coverage	Claimant	Adjuster	Status	Open Recovery Reserves	Remaining P

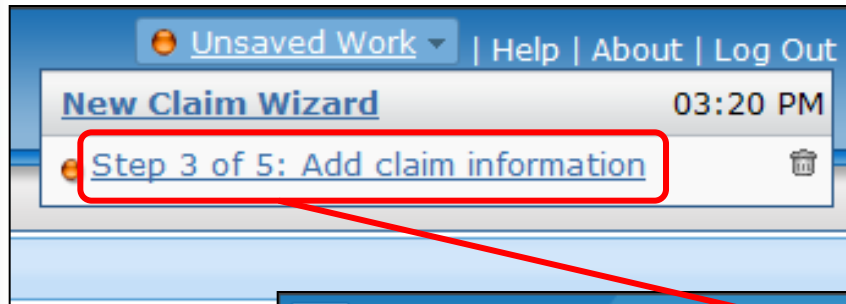
Parties Involved

Latest Notes (1 - 10)

Existing
Claim

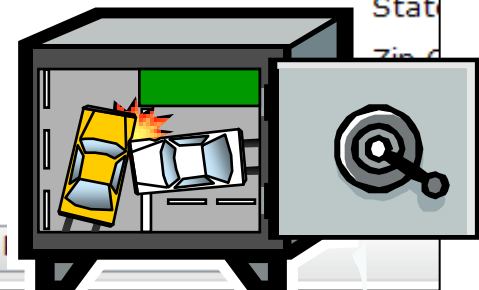


New Claims in the Unsaved Work Menu



- ▶ New claims are always listed in the Unsaved Work menu

A screenshot of the Guidewire ClaimCenter application. The top navigation bar shows 'Unsaved Work' and a dropdown menu with 'Desktop', 'Search', 'Address Book', 'Claim', and 'Vacation'. The 'Claim' dropdown is open, showing 'Step 3 of 5: Add claim information'. The main content area displays the 'Step 3 of 5: Add claim information' form. The form includes fields for 'What Happened?', 'Date of Loss' (03/24/2008 12:00 AM), 'Loss Cause' (<none selected>), and 'Incident Only?' (unchecked). The left sidebar contains the 'New Claim Wizard' with links for 'Find Policy', 'Basic Info', 'Loss Details' (selected), 'Services', and 'Save & Assign Claim'. Below this are sections for 'Parties Involved', 'Policy', and 'Policy Details'. At the bottom, there are buttons for 'Add Vehicle', 'Add Pedestrian', and 'Add ...'. A red arrow points from the 'Step 3 of 5: Add claim information' item in the 'Unsaved Work' menu to the 'Claim' dropdown in the main application window.



Interrupted New Claims

Guidewire ClaimCenter

Desktop Search Address Book Claim Vacation

Claims
Activities
Checks
Recoveries
Bulk Invoices

Search Claims
[Simple Search](#) | [Advanced Search](#)

Claim # Search For Claimant
Policy # 54-123456 First Name

Search Results (1 - 4 of 4)

<input type="checkbox"/>	<input type="checkbox"/>	Claim	Insured	Policy	Claimant	Adjuster	Status
<input type="checkbox"/>	<input type="checkbox"/>	235-53-365870	Ray Newton	54-123456	Bo Simpson, Ray Newton	Andy Applegate	Open
<input type="checkbox"/>	<input type="checkbox"/>	999-99-999950	Ray Newton	54-123456			Draft

Guidewire ClaimCenter

Desktop Search Address Book Claim Vacation

Pol: 54-123456 | Ins: Ray Newton | DoL: 03/24/2008 | St: Draft

Actions

New Claim Wizard

- [Find Policy](#)
- Basic Info**
- [Loss Details](#)
- [Services](#)
- [Save & Assign Claim](#)

Parties Involved

Policy

Policy General

Step 2 of 5: Basic information

Reported By

How Reported

Name *

Relation to Insured *

Date of Notice

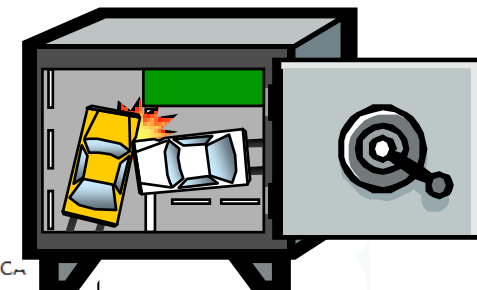
Verify Date of Birth

Date of Birth

Confirm Contact Info

Address 287 Kensington Rd. #1A, South Pasadena, CA

Business Phone



Lesson Objectives

You should now be able to:

- Identify the general features of the new claim wizard
- Initiate the new claim wizard
- Identify the differences between the full claim wizard and the quick claim wizard
- Identify what happens if you leave the new claim wizard while the claim is incomplete

Review Questions

1. Identify if the following are true or false:
 - a) If you do not provide required information on a given step, you cannot move to the next step.
 - b) You can complete the new claim wizard without navigating to the final step in the wizard.
 - c) You cannot create a claim if the system detects possible duplicate claims.
 - d) Once you have started the full claim wizard, you can still switch over to the quick claim wizard.
 - e) If you leave the new claim wizard without clicking Finish, the new claim is discarded.
2. What does ClaimCenter do after the user clicks the Finish button but before it displays the "claim successfully saved" screen?

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