

Supervisors

Lesson Objectives

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

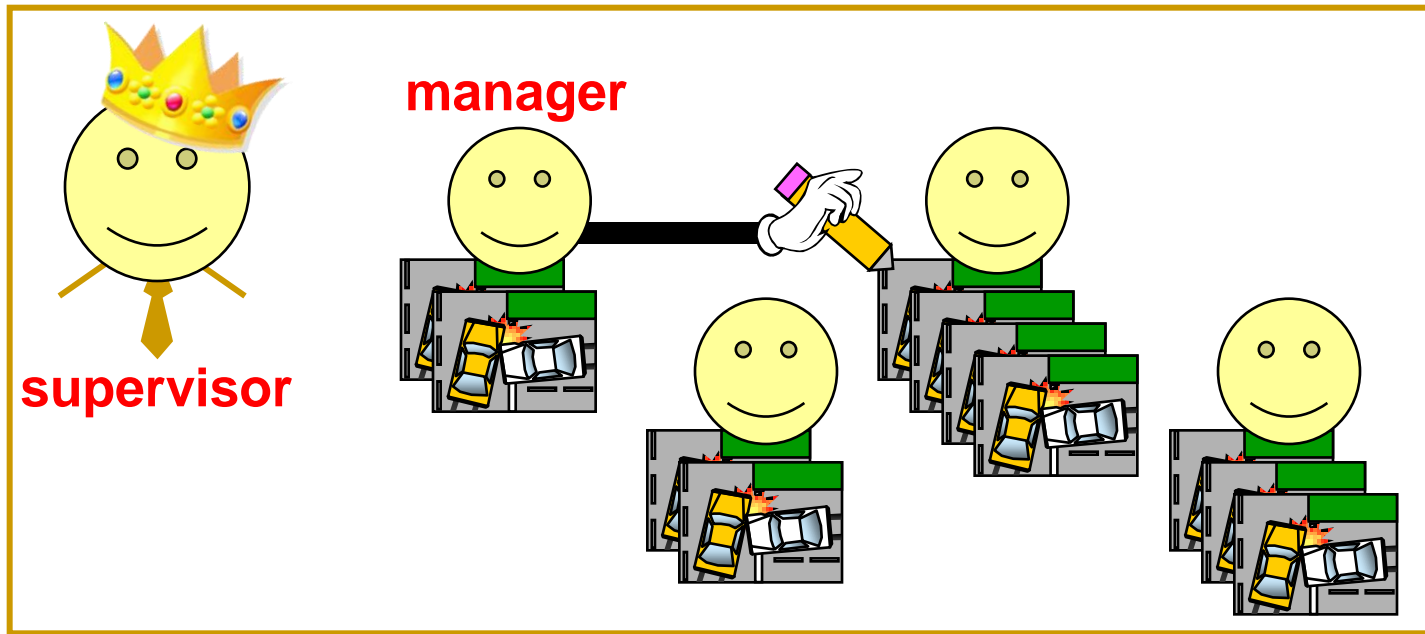
- Describe the difference between a supervisor, a manager, and a regular end user
- Use the Team tab
- Describe how supervisors attend to claims and activities that require attention

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

- ▶ Supervisor Basics
- ▶ The Team Tab
- ▶ Objects That Require Attention

Supervisors and Managers (Business Perspective)



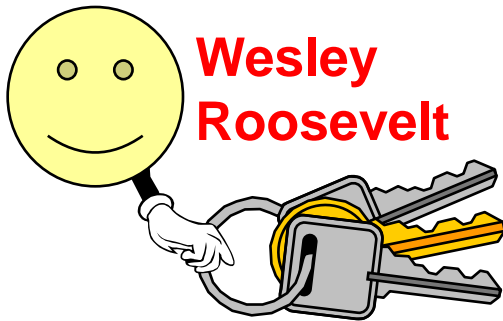
► Supervisor

- Responsible for ensuring group's work is completed

► Manager

- Responsible for occasionally accessing work assigned to others

Supervisors and Managers (Functional Perspective)



**Wesley
Roosevelt**

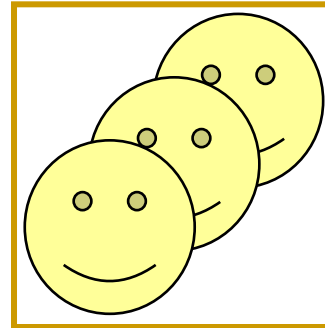
Supervisor



**Isabel
Harkin**

Manager

Auto Adjusters

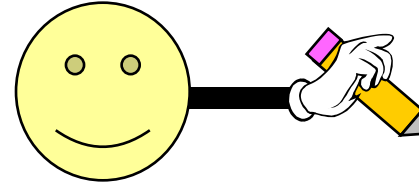


supervisor: Wesley Roosevelt
manager: Isabel Harkin

Common Supervisor/Manager Abilities

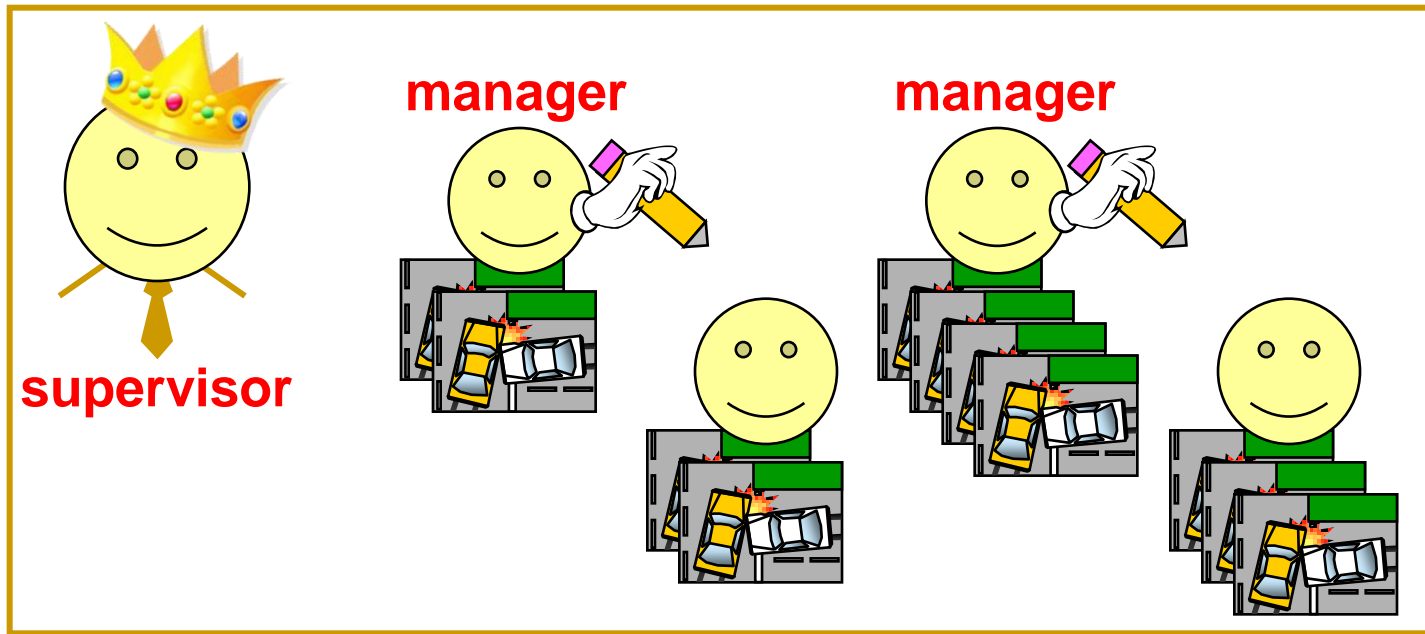


- ▶ Access any object that any member of the group can access
- ▶ View summary information on Team tab about objects assigned to users in group
- ▶ Assign "Pending Assignment" claims
- ▶ Respond to objects that "need attention"



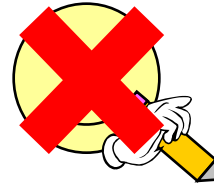
- ▶ Access any object that any member of the group can access
- ▶ View summary information on Team tab about objects assigned to users in group

Group Rules and Restrictions



- ▶ A group must have one and only one supervisor
- ▶ A group can have zero, one, or many managers

Review: The Pending Assignment List



[DEV mode] Guidewire ClaimCenter (Wesley Roosevelt) - Windows Internet Explorer

http://localhost:8080/cc/ClaimCenter.do

Guidewire ClaimCenter

Desktop Search Team Address Book Claim Vacation

Actions

- Activities (0)
- Claims (0)
- Exposures (0)
- Pending Assignment (1)**
- Queues (0)
- Calendar
- Bulk Invoices

Pending Assignment (1 - 1 of 1)

My pending assignments Assign Reassign Activity Print/Export

<input type="checkbox"/>	★	📅	Due▲	Claim▲	Insured	Additional Information	Exposure
<input type="checkbox"/>	★		05/19/2008	000-00-000103	Robert Farley	Assign Overall Claim	

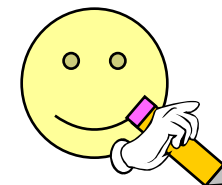
My pending assignments Assign Reassign Activity Print/Export

- ▶ Typically, Pending Assignment is visible only to group supervisors
 - Lists claims requiring manual assignment

Lesson Outline

- ▶ Supervisor Basics
- ▶ The Team Tab
- ▶ Objects That Require Attention

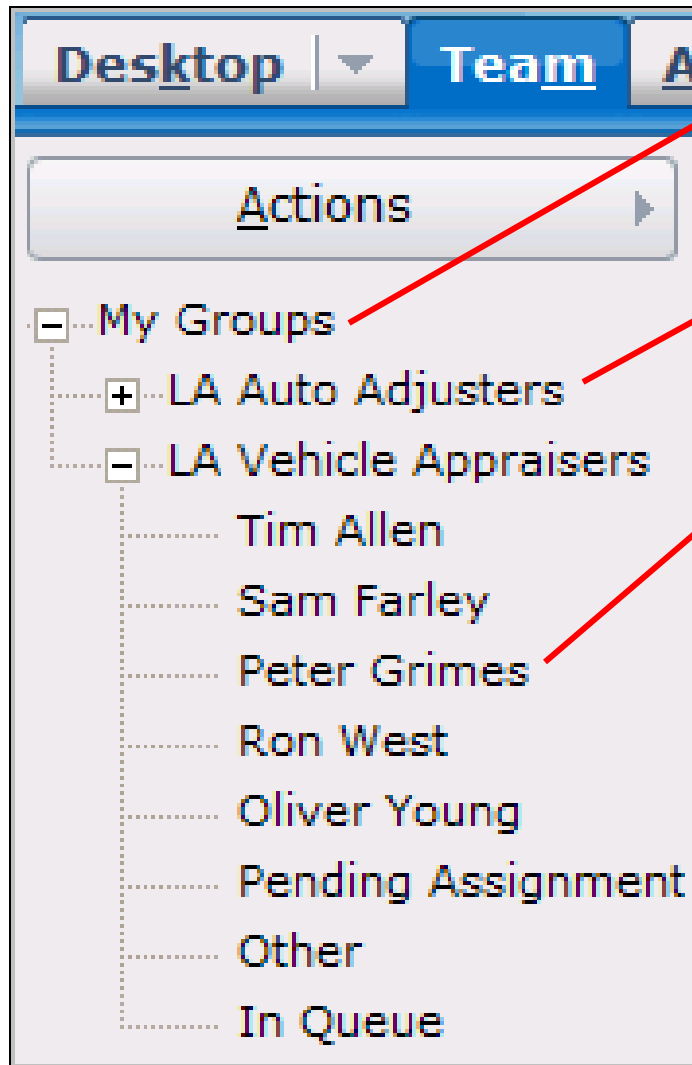
The Team Tab



Desktop Search Team Address Book Claim Vacation Go to (
My Groups: Summary												
Summary Aging												
Print/Export As of: 06/05/2008 09:55 AM												
Actions My Groups + LA Auto Adjusters + LA Vehicle Appraisers	Claims				Exposures		Matters		Active			
	Name	Open	Flagged	New	Closed	Open	Closed	Open	Closed	Open	Overdue	Completed Today
	LA Auto Adjusters	5	4	0	0	8	0	1	0	45	40	0
	LA Vehicle Appraisers	0	0	0	0	0	0	0	0	2	2	0
	Total	5	4	0	0	8	0	1	0	47	42	0

- ▶ Visible only for users who supervise or manage at least one group
- ▶ Lists information about objects assigned to:
 - Any of those groups ("My Groups")
 - A given group
 - A given user in a given group

The Team Tab Tree View



display summary of objects owned by all groups listed

display summary of objects owned by this group

display summary of objects owned by this user

- ▶ Expandable view of each group the user supervises or manages
 - Clicking a group or user displays information about objects assigned to that group or user

"My Groups" Screens

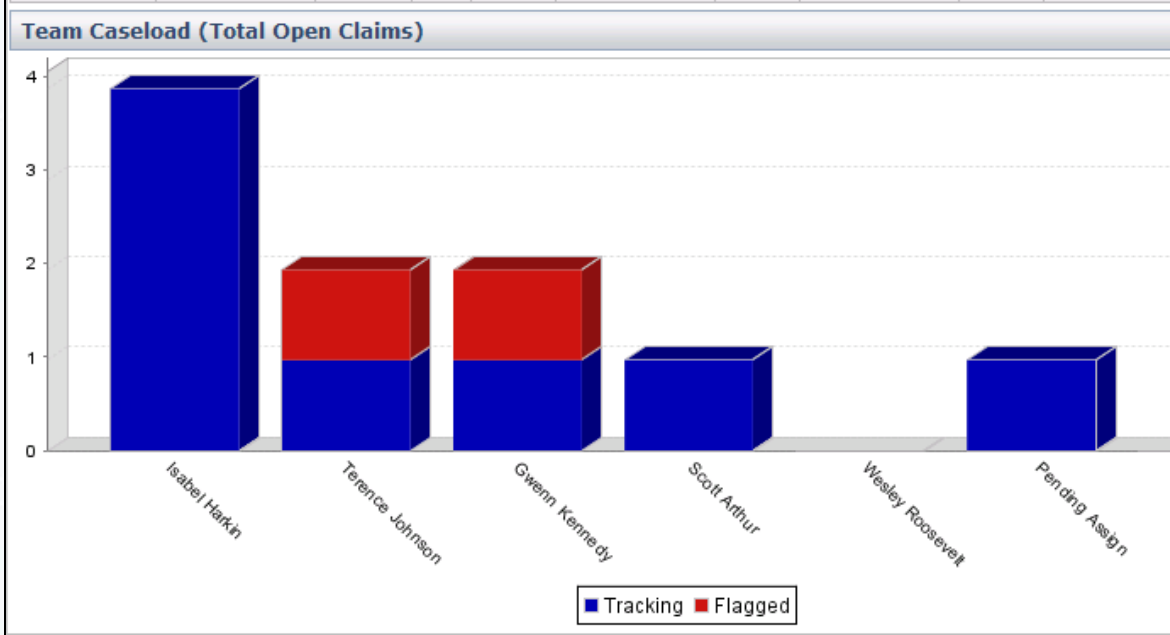
My Groups: Summary											
Summary Aging											
Print/Export As of: 06/05/2008 10:26 AM											
	Claims				Exposures		Matters		Activities		
Name	Open	Flagged	New	Closed	Open	Closed	Open	Closed	Open	Overdue	Completed Today
LA Auto Adjusters	5	4	0	0	8	0	1	0	45	40	0
LA Vehicle Appraisers	1	1	0	0	0	0	0	0	4	3	0
Total	6	5	0	0	8	0	1	0	49	43	0

My Groups: Aging								
Summary Aging								
Print/Export As of: 06/05/2008 10:26 AM								
	Claims: Open (Litigated)				Exposures			
Name	0 to 30 Days	31 to 60 Days	61 to 120 Days	Over 120 Days	0 to 30 Days	31 to 60 Days	61 to 120 Days	Over 120 Days
Total	6 (1)	0 (0)	0 (0)	0 (0)	8	0	0	0
LA Auto Adjusters	5 (1)	0 (0)	0 (0)	0 (0)	8	0	0	0
LA Vehicle Appraisers	1 (0)	0 (0)	0 (0)	0 (0)	0	0	0	0

- ▶ Summary: status of all assignable entities
- ▶ Aging: how long claims and exposures have been open

Group Summary Screen

LA Auto Adjusters: Summary									
Summary Aging Claims Exposures Activities Matters									
Print/Export As of: 06/05/2008 01:17 PM									
	Claims				Exposures		Matters		
Name	Open (Global)	Flagged	New	Closed	Open (Global)	Closed	Open (Global)	Closed	Open (Glob.)
Isabel Harkin	4 (4)	0	0	0	4 (4)	0	1 (1)	0	24 (24)
Terence Johnson	2 (2)	1	0	0	2 (2)	0	0 (0)	0	5 (5)
Gwenn Kennedy	2 (2)	1	0	0	5 (5)	0	0 (0)	0	8 (8)
Scott Arthur	1 (1)	0	0	0	2 (2)	0	0 (0)	0	18 (18)
Pending Assign/In Queue	1	0	0	0	2	0	0	0	3
Wesley Roosevelt (Supervisor)	0 (0)	0	0	0	0 (0)	0	0 (0)	0	1 (1)
Other	0	0	0	0	0	0	0	0	0
Total	10	2	0	0	15	0	1	0	59



- ▶ List summarizes status of claims, exposures, matters, and activities for each user in group
- ▶ Graph summarizes data for open and flagged claims

Group Aging Screen

LA Auto Adjusters: Aging							
Summary Aging Claims Exposures Activities Matters							
Print/Export As of: 06/05/2008 01:17 PM							
	Claims: Open (Litigated)				Exposures		
Name	0 to 30 Days	31 to 60 Days	61 to 120 Days	Over 120 Days	0 to 30 Days	31 to 60 Days	61 to 120 Days
Total	10 (1)	0 (0)	0 (0)	0 (0)	15	0	0
Isabel Harkin	4 (1)	0 (0)	0 (0)	0 (0)	4	0	0
Terence Johnson	2 (0)	0 (0)	0 (0)	0 (0)	2	0	0
Gwenn Kennedy	2 (0)	0 (0)	0 (0)	0 (0)	5	0	0
Scott Arthur	1 (0)	0 (0)	0 (0)	0 (0)	2	0	0
Pending Assign/In Queue	1 (0)	0 (0)	0 (0)	0 (0)	2	0	0
Wesley Roosevelt (Supervisor)	0 (0)	0 (0)	0 (0)	0 (0)	0	0	0

- Lists information about number of days that claims and exposures assigned to each group member have been opened and not yet closed

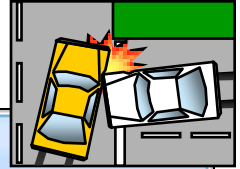
Group Objects Screens



LA Auto Adjusters: Activities (1 - 15 of 51)							
Summary Aging Claims Exposures Activities Matters							
Overdue only ▾		Assign		Print/Export		Page 1	
<input type="checkbox"/>		Due	Priority	Subject	Claim	Insured	Assigned To
<input type="checkbox"/>		05/05/2008	Urgent	Make initial contact with insured	000-00-000203	Jim Means	Isabel Harkin
<input type="checkbox"/>		05/07/2008	Urgent	Make initial contact with insured	000-00-000103	Robert Farley	Pending Assignment
<input type="checkbox"/>		05/08/2008	Urgent	Make initial contact with claimant	000-00-000103	Robert Farley	Scott Arthur
<input type="checkbox"/>		05/12/2008	Urgent	Make initial contact with insured	000-00-000304	Brittany Turner	Gwenn Kennedy
<input type="checkbox"/>		05/13/2008	Urgent	Make initial contact with claimant	000-00-000304	Brittany Turner	Gwenn Kennedy
<input type="checkbox"/>		05/18/2008	Urgent	Contact insured	000-00-000505	Allen Robertson	Isabel Harkin
<input type="checkbox"/>		05/21/2008	Urgent	Contact insured	000-00-000508	Larry Gamney	Terence Johnson

- ▶ Four screens (one for claims, exposures, activities, and matters)
 - Each lists all objects owned by group

Given User Object Screens



Isabel Harkin: Claims (1 - 4 of 4)

Claims | Exposures | Activities | Matters

All open owned

Assign

Remove Flag

Print/Export

<input type="checkbox"/>		Claim	Adjuster	Policy	Insured	Claimant	Net Total Incurred	Loss Date
<input type="checkbox"/>		000-00-000203	Isabel Harkin	54-253465	Jim Means	Jim Means	\$1,500.00	05/01/2008
<input type="checkbox"/>		000-00-000505	Isabel Harkin	54-253465	Allen Robertson	Allen Robertson	\$3,000.00	05/16/2008
<input type="checkbox"/>		000-00-000605	Isabel Harkin	54-847564	Larry Gamney	Carl Rand, Judy Rand, Larry Gamney	\$7,500.00	05/19/2008
<input type="checkbox"/>		000-00-000705	Isabel Harkin	54-123456	Ray Newton	Ray Newton	\$1,405.00	05/01/2008

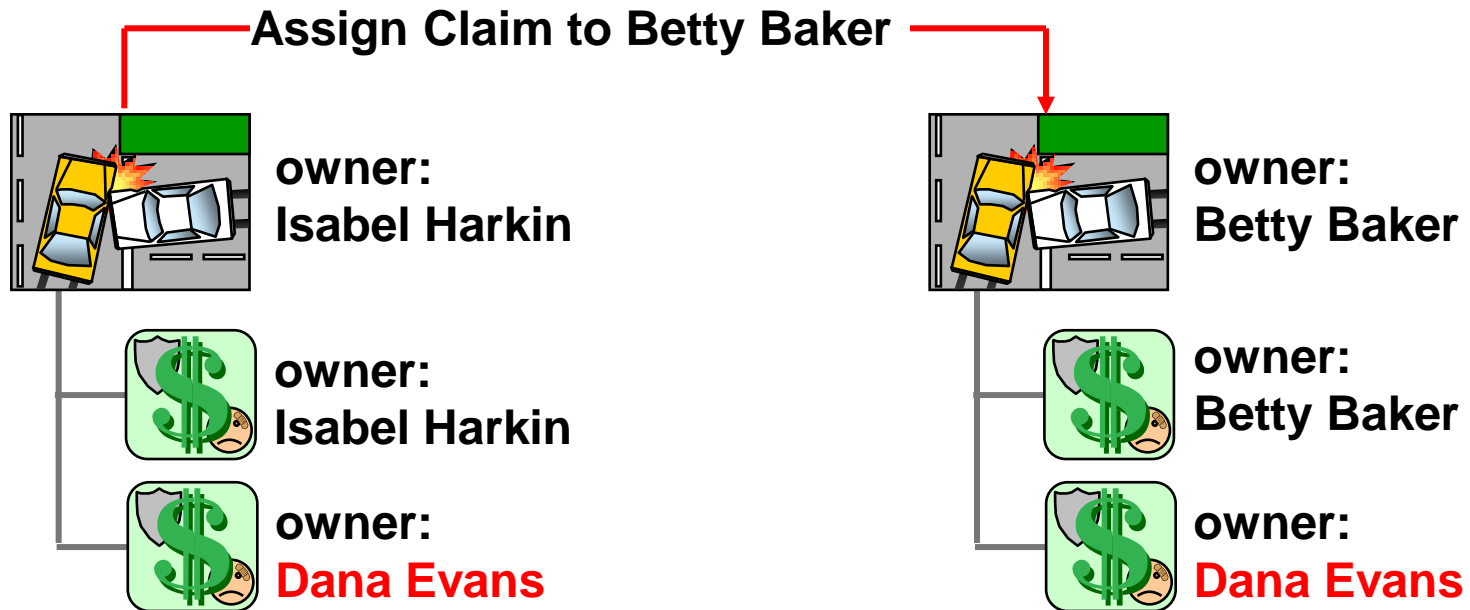
- ▶ Four screens (one for claims, exposures, activities, and matters)
 - Each lists all objects owned by a user through the group

Reassigning Objects

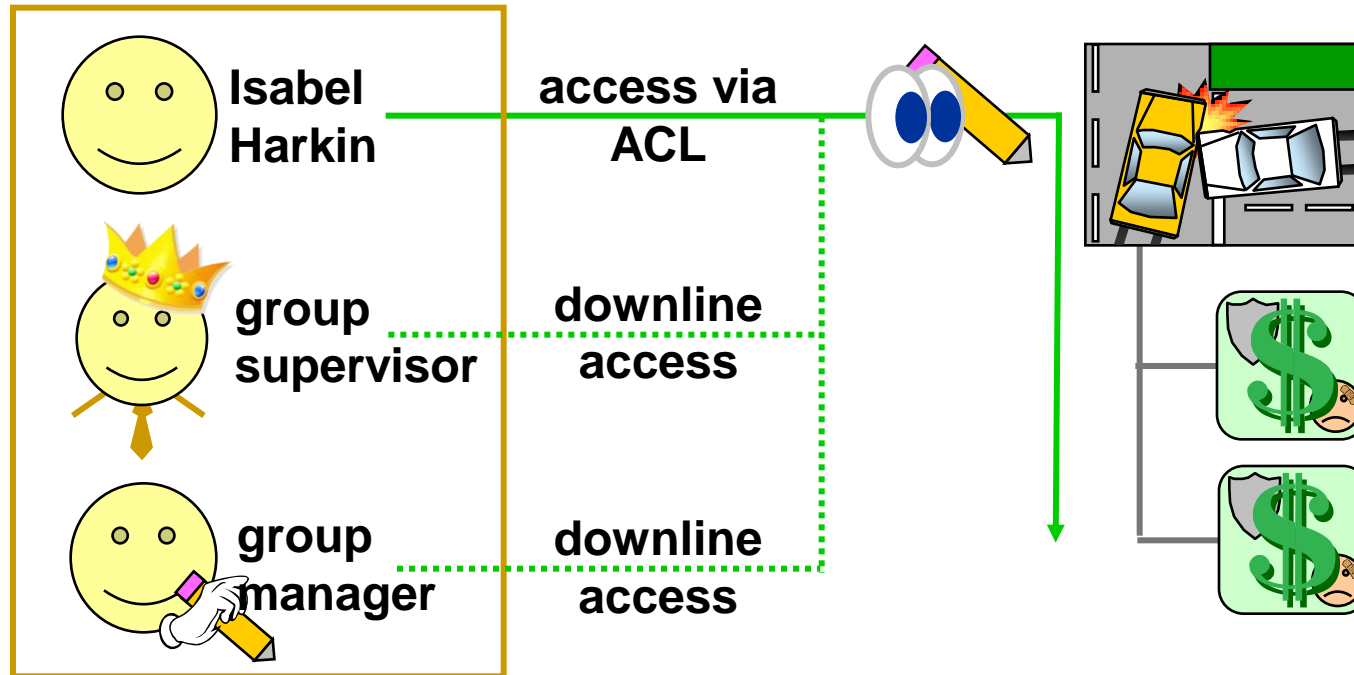
Isabel Harkin: Claims (1 - 4 of 4)
Claims | Exposures | Activities | Matters

All open owned ▼ **Assign** Remove

<input type="checkbox"/>		<u>Claim</u>	<u>Adjuster</u>	<u>Policy</u>
<input checked="" type="checkbox"/>		000-00-000705	Isabel Harkin	54-123456
<input type="checkbox"/>		000-00-000203	Isabel Harkin	54-253465



Downline Access



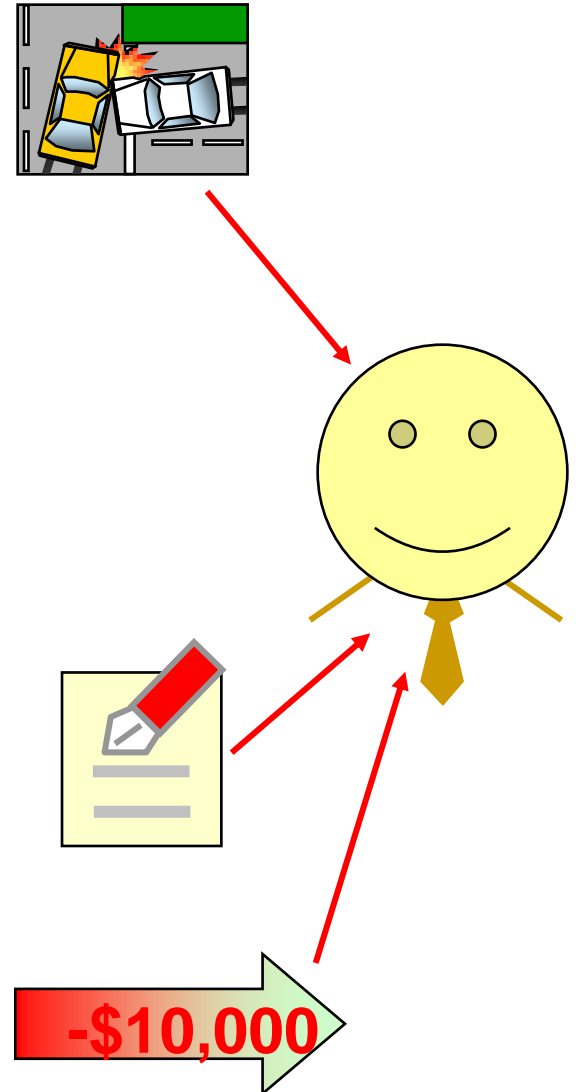
- ▶ Configuration option for ClaimCenter
 - When set to true, supervisors and managers can access any claim that a member of the group and its subgroups can access

Lesson Outline

- ▶ Supervisor Basics
- ▶ The Team Tab
- ▶ Objects That Require Attention

Review: Objects That Require Attention

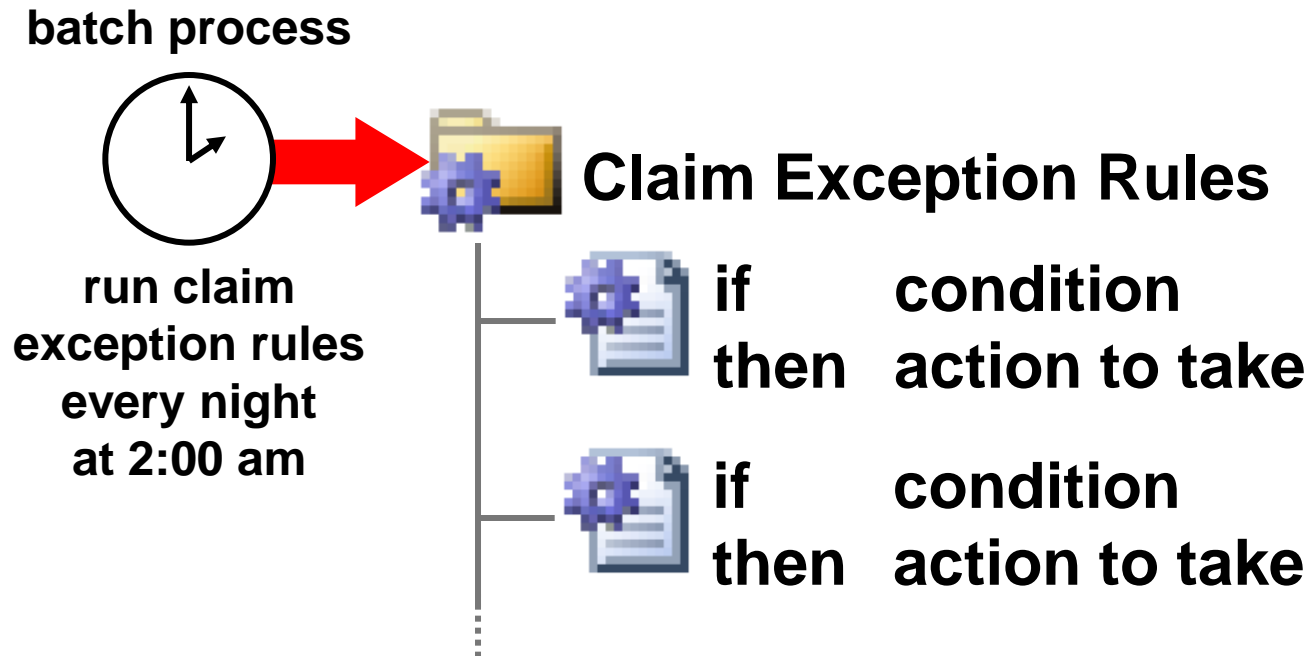
- ▶ Claims, when important activity on claim has occurred, such as:
 - Claim reported two weeks ago and fault rating has not be specified
 - Auto is total loss and salvage is now required
 - Lawyer for third-party claimant has been added
- ▶ Activities, when still open as of escalation date
- ▶ Transactions, when either:
 - Amount exceeds a given threshold
 - Given condition occurs



Objects That Require Attention

	Cause	System Response	Supervisor Response
Claim	<ul style="list-style-type: none">▶ Remainder of lesson discusses each object type, including:<ul style="list-style-type: none">• What causes it to "need attention"?• What does ClaimCenter do when it needs attention?• What is the supervisor expected to do in response?		
Activity			
Trans-action			

What Causes a Claim To Need Attention?



- ▶ Claim exception rules check for claims that meet business criteria for "needing attention"
 - Batch process executes claim exception rules

How Does ClaimCenter Respond?



Claim Exception Rules



if claim reported 2 weeks ago
and no fault rating set
then set claim to flagged

The screenshot displays the ClaimCenter interface for a specific claim. The top navigation bar includes links for Desktop, Search, Team, Address Book, and the current claim (000-00-000705). Below this, the claim details are shown: Pol: 54-123456, Ins: Ray Newton, DoL: 05/01/2008, St: Open, Adj: Isabel Harkin (LA A). A red circle highlights the 'Actions' dropdown menu, which is open, showing options for Summary, Workplan, and Loss Data. The 'Summary' option is selected, leading to a detailed view of the claim. This view includes a 'Summary' tab, a 'Basics' section showing 'Open' status with a red bar indicating 24 days (Target: 7) and a note 'Collided with other car.', and a 'Financials' section with a 'Gross Incurr' gauge.

Desktop	Search	Team	Address Book	Claim (000-00-000705)
Pol: 54-123456 Ins: Ray Newton DoL: 05/01/2008 St: Open Adj: Isabel Harkin (LA A)				
Actions				
Summary				

Desktop	Search	Team	Address Book	Claim (000-00-000705)
Pol: 54-123456 Ins: Ray Newton DoL: 05/01/2008 St: Open Adj: Isabel Harkin (LA A)				
Actions				
Summary				
Workplan				
Loss Data				

Summary	
Summary Claim Status Claim Health Metrics	
Basics	Financials
Open 24 days (Target: 7) Collided with other car.	Gross Incurr

Flag Information

Desktop | **Claim (000-00-000108)** | **Search**

Pol: 54-123456 | Ins: Ray Newton | D

Overdue urgent priority activity: Make initial contact with insured

Claim Status
Summary | Claim Status | Claim Health Metrics

General Status

Loss Type	Auto
Line of Business	Auto
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Incident Only?	No
Claim Status	Open
Date Reported	09/25/2009
Create Date	09/25/2009
Days Open	24

High-Risk Indicators

Litigation

Litigation Status	Litigation Identified
Days after FNOL	First Notice Suit
Next Trial Date	

Flag Details

Flagged

Date Flagged

Reason for Flag

Currently flagged

09/25/2009

Overdue urgent priority activity: Make initial contact with insured

Storage

Date Shipped to Storage	
Storage Location State	

SIU Score 1

Referred to SIU team? No

Flag Details

Flagged	Currently flagged
Date Flagged	09/25/2009
Reason for Flag	Overdue urgent priority activity: Make initial contact with insured

How Does the Supervisor Respond?

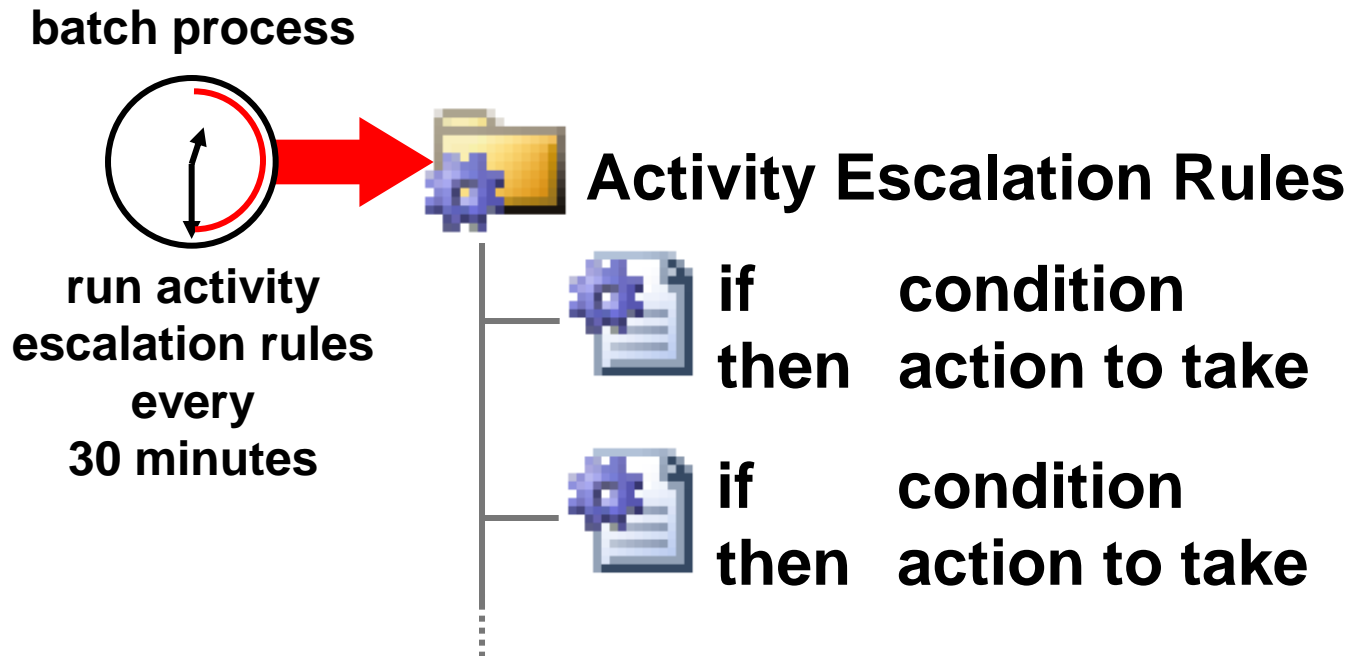
LA Auto Adjusters: Claims (1 - 10 of 10)						
Summary Aging Claims Exposures Activities Matters						
All open owned				Assign	Remove Flag	Print/Export
<input type="checkbox"/>		<u>Claim</u>	<u>Adjuster</u>	<u>Policy</u>	<u>Insured</u>	<u>Claimant</u>
<input checked="" type="checkbox"/>		000-00-000304	Gwenn Kennedy	56-475868	Brittany Turner	Brittany Turner, Marcus Sato
<input type="checkbox"/>		000-00-000508	Terence Johnson	54-847564	Larry Gamney	
<input type="checkbox"/>		000-00-000103	Pending Assignment	54-586734	Robert Farley	Angel Ramirez, Robert Farley

- ▶ Supervisor should:
 - Attend to the issue as appropriate, and then
 - Remove flag

Claims That Require Attention

	Cause	System Response	Supervisor Response
Claim	- Exception rules set claim to flagged	- Flag icon displayed in info bar and list views	- Attend to the issue, THEN - Remove claim flag
Activity			
Trans-action			

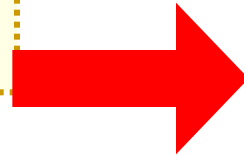
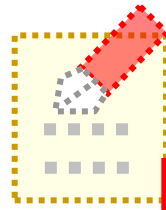
What Causes an Activity To Need Attention?



- ▶ Activity escalation rules check for activities that are open passed the activity's escalation date
 - Batch process executes activity escalation rules

Review: Setting Escalation Points

escalation:
10 days



due: 05/20/2009

escalate on: 05/29/2009

Notification and Contact

Date of Notice

05/19/2008

<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		Activity Pattern Dates	
Subject	Verify coverage	Target days	2
Short Subject		Target hours	
Class	Task	Target start point	Activity creation date
Type	General	Include these days	Business days
Category	Reminder	Business calendar type	Federal Holidays
Code	coverage	Escalation days	10
Priority	High	Escalation hours	
Mandatory	Yes	Escalation start point	Claim notice date
Calendar Importance	Not On Calendar	Include these days	Calendar days

How Does ClaimCenter Respond?



Activity Escalation Rules



(always) create activity to alert supervisor about activity



**if activity is Verify Coverage
then set claim to flagged**



<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

<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

How Does the Supervisor Respond?

Isabel Harkin: Activities (1 - 15 of 27)
Claims | Exposures | **Activities** | Matters

All open ▼ **Assign** | Print/Export

<input type="checkbox"/>		<u>Due</u>	<u>Priority</u>	<u>Subject</u> ▲
<input type="checkbox"/>		06/18/2008	Normal	30 day file review
<input checked="" type="checkbox"/>		05/18/2008	Urgent	Contact insured

- ▶ Supervisor should attend to the issue as appropriate
- ▶ There is no mechanism to "unescalate" an activity
 - Once escalated, activity remains escalated until closed

Activities That Require Attention

	Cause	System Response	Supervisor Response
Claim	- Exception rules set claim to flagged	- Flag icon displayed in info bar and list views	- Attend to the issue, THEN - Remove claim flag
Activity	- Activity is open on or after escalation date	- Escalation rules executed - Escalated icon displayed in list views	- Attend to the issue (such as reassign activity)
Trans-action			

Financials Approval



- ▶ ClaimCenter reviews every transaction to determine if it requires approval
 - Financials approval is discussed in the Financials Approval lesson

Lesson Objectives Review

You should now be able to:

- Describe the difference between a supervisor, a manager, and a regular end user
- Use the Team tab
- Describe how supervisors attend to claims and activities that require attention

Review Questions

1. Name one thing:
 - a) A supervisor can do that a manager cannot do.
 - b) A manager can do that a regular user cannot do.
2. For each of the following, state if it describes claims, activities, or both.
 - a) The only logic used to determine the object needs supervisor attention is time-based logic. No other logic is applied.
 - b) A set of configurable business rules are used to determine if the object needs attention.
 - c) An icon is used in list views to identify that the object needs attention.

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