

Reporting

Lesson Objectives

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

- Describe how lists can be used for "ad hoc" reporting
- Describe the functionality of the ClaimCenter Standard Reporting feature

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

- ▶ Using Lists as Reports
- ▶ ClaimCenter Standard Reporting

Using Lists as Reports

- ▶ Several list views in the base application can be used by managers, supervisors, and executives as reports

Team tab lists

Search tab lists

US-MW Normal Auto Adjusters: Summary
Summary | Aging | Claims | Exposures | Activities | Matters

Print/Export | As of: 06/06/2008 02:03 PM

Name	Claims				Exposures	
	Open (Global)	Flagged	New	Closed	Open (Global)	Closed
Leroy Martell	25 (25)	7	0	0	30 (30)	0
Dana Evans	21 (21)	4	0	2	22 (22)	0
Fernando	16 (16)	2	0	0	16 (16)	0

Search Claims
Simple Search | Advanced Search

Specify at least one of the following

Claim #

Policy #

Search For

First Name

Last Name

Organization Name

Tax ID

Assigned To Group

Optional parameters

- Jurisdiction State
- Claim Status
- Line of Business
- Loss Type
- Pending Assignment
- Coverage in Question
- Flagged Type
- Incident Report
- Litigation Status

Team Tab Lists

US-MW Normal Auto Adjusters: Claims (1 - 15 of 110)						
Summary Aging Claims Exposures Activities Matters						
All open owned		Assign	Remove Flag	Print/Export		
<input type="checkbox"/>		Claim	Adjuster	Policy	Insured	Claimant
<input type="checkbox"/>		110-00-110001	Leroy Martell	55-998871	Florence Construction	Charles D
<input type="checkbox"/>		110-00-110005	Leroy Martell	55-998875	Amber Waves	Amber W.
<input type="checkbox"/>		100-00-100001	Dana Evans	22-998871	Jim Means	Jim Mean
<input type="checkbox"/>		430-00-430003	Leroy Martell	02-263535	Gerald Shields	
<input type="checkbox"/>		000-00-100001	Dana Evans	37-100101	Brenda Munson	Brenda M
<input type="checkbox"/>		-100002	Kim Raftly	37-100102	Bernard Ray	Bernard R
<input type="checkbox"/>		-100006	Leroy Martell	37-100106	Rachel Hall	Rachel Ha
<input type="checkbox"/>		-100018	Leroy Martell	37-100118	Ethel Korza	Ethel Kor.
<input type="checkbox"/>		-100019	Dana Evans	37-100119	Raymond Levitt	Raymond
<input type="checkbox"/>		-100024	Leroy Martell	37-100124	Stephen Feng	Stephen
<input type="checkbox"/>		000-00-100033	Wesley Kennison	37-100133	Sarah Feng	Sarah Fe
<input type="checkbox"/>		000-00-100034	Fernando Carey	37-100134	Eugene Angleman	Eugene A
<input type="checkbox"/>		000-00-100035	Javier Sanford	37-100135	Gary Benjamin	Gary Benj
<input type="checkbox"/>		000-00-100040	Fernando Carey	37-100140	Jeff Rossi	Jeff Rossi
<input type="checkbox"/>		000-00-100044	Kim Raftly	37-100144	Sherry Michalowski	Sherry Mi

- All open owned
☐
- All open owned
☒
- New owned (this week)
☐
- Flagged
☐
- Closed in last 90 days
☐
- All open related
☐
- New related (this week)
☐

Search Tab Lists

Search Activities

Specify at least one of the following

Claim #

Assigned To Group **US-MW Normal Auto Adjusters** ▼

Include Child Groups ☐ Yes ☐ No

Assigned To User ▼

Created By ▼

External Owner ▼

Optional parameters

Status **Open** ▼

Priority ▼

Completed Late ▼

Overdue Now **Yes** ▼

Pending Assignment ▼

Description

Search For Date ▼

☐ Since ▼

☒ From

☒ **Send reservation of rights letter** ▼

☐ Contains

Search Results (1 - 2 of 2)

<input type="checkbox"/>		Subject	Claim	Insured	Due	Closed	Priority	Status	External	External Owner	Assigned To
<input type="checkbox"/>		Reservation of rights letter	110-00-110001	Florence Construction	05/22/2008		High	Open	No		Leroy Martell
<input type="checkbox"/>		Reservation of rights letter	100-00-100001	Jim Means	05/22/2008		High	Open	No		Dana Evans

Printing and Exporting List Results

Search Results (1 - 14 of 14)

Assign **Print/Export**

<input type="checkbox"/>	Subject	Claim
<input type="checkbox"/>	Contact insured	110-00-110001
<input type="checkbox"/>	Contact insured	110-00-110002

Print/Export Options (Return to Search Activities)

OK Done

Select print/export options

☐ Print (as PDF)
☒ Export (as CSV)
☐ Custom Export (as CSV)

Microsoft Excel - Print[1].csv

File Edit View Insert Format Tools Data Window Help Adobe PDF

SnagIt Window

A1 This activity has been escalated

	A	B	C	D	E	F	G	H	I	J	K	L
1	This activity has been escalated	Subject	Claim	Insured	Due	Closed	Priority	Status	External	External O	Assigned To	
2	No	Contact in:	110-00-110	Florence C	5/20/2008	5/20/2008	Urgent	Complete	No		Leroy Martell	
3	No	Contact in:	110-00-110	Harlow Bui	5/15/2008	5/15/2008	Urgent	Complete	No		Leroy Martell	
4	No	Contact in:	110-00-110	Carmelina'	5/10/2008	5/10/2008	Urgent	Complete	No		Leroy Martell	
5	No	Contact in:	110-00-110	Specialty F	5/22/2008	5/22/2008	Urgent	Complete	No		Leroy Martell	
6	No	Contact in:	110-00-110	Amber Wa	5/19/2008	5/19/2008	Urgent	Complete	No		Leroy Martell	
7	No	Contact in:	110-00-110	Wright Cor	5/30/2008	5/30/2008	Urgent	Complete	No		Leroy Martell	
8	No	Contact in:	100-00-100	Jim Means	5/20/2008	5/20/2008	Urgent	Complete	No		Dana Evans	
9	No	Contact in:	100-00-100	Gus Early	5/15/2008	5/15/2008	Urgent	Complete	No		Dana Evans	
10	No	Contact in:	100-00-100	Wendy Kil	5/10/2008	5/10/2008	Urgent	Complete	No		Dana Evans	

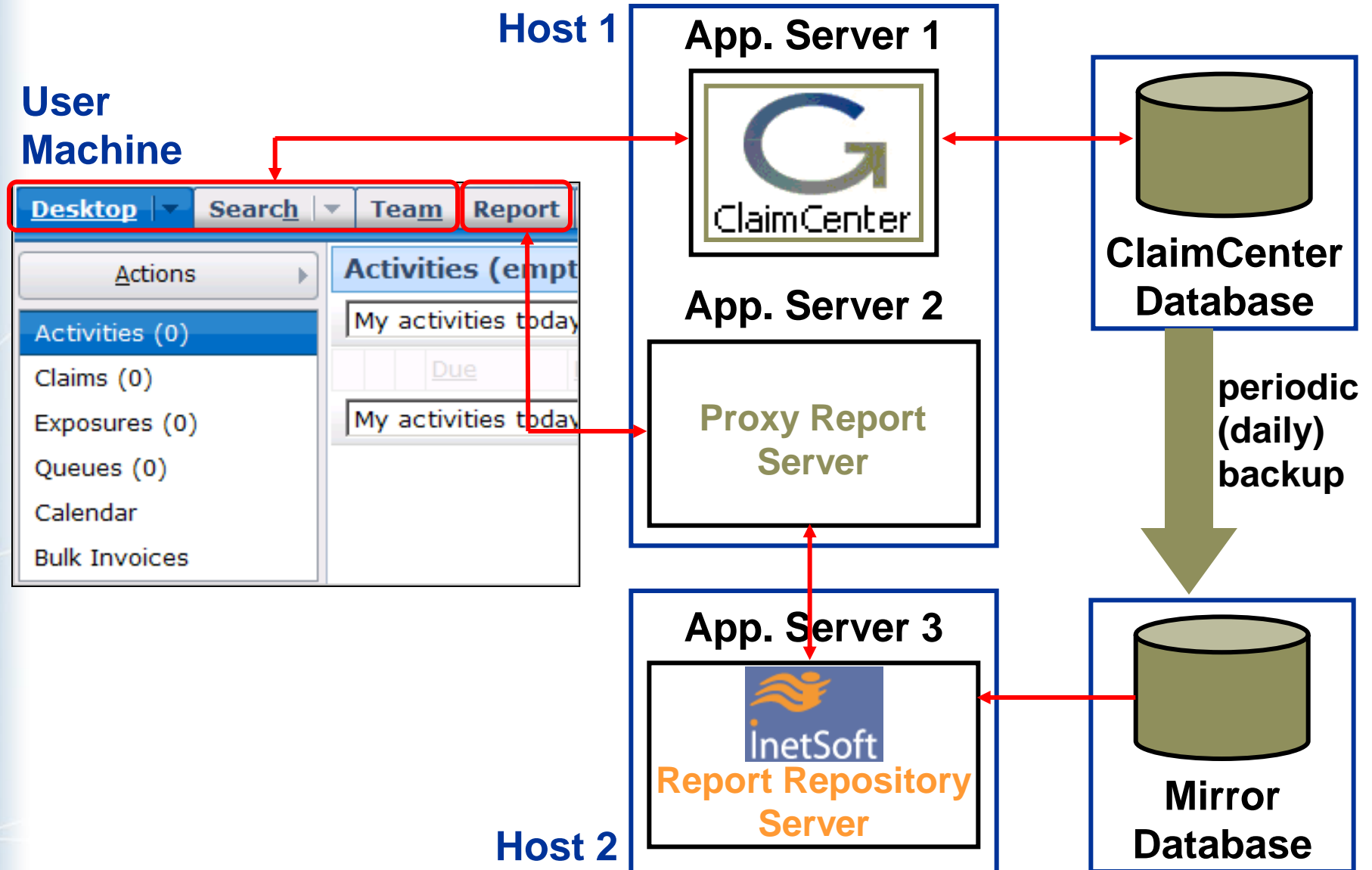
Lesson Outline

- ▶ Using Lists as Reports
- ▶ ClaimCenter Standard Reporting

ClaimCenter Standard Reporting

- ▶ Optional ClaimCenter feature which consists of reporting solution developed for supervisors and executives
 - Standard library of 40 reports
 - Designed to assess operational and financial health of organization
 - Accesses data from copy of ClaimCenter database
 - Improved report performance
 - Avoids compromising ClaimCenter performance

ClaimCenter Standard Reporting Architecture

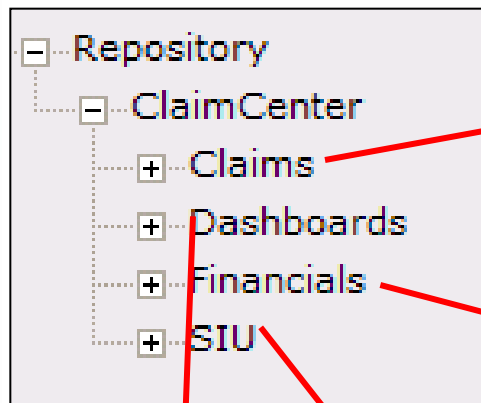


The Report Tab

Expand node and select appropriate report

Adjustable report parameters and the report itself are displayed here

Reports in the Base Application



Average Claim Cost Trend
 Average Expenses Trend
 Catastrophe Financials
 Catastrophe Severity
 Current Catastrophe Finan
 Large Loss Financials
 Monthly Claim Costs Paid
 Monthly Expenses Paid
 Monthly Expenses and Clai
 Monthly Financial Transacti
 Monthly Recoveries
 Open Claim Financials
 Transaction Detail

Open Claim Counts
 Open Claim Financials Dashbo
 Past 30 Day Claim Dashboard
 Past 30 Day Financials

Matching Payment Address
 Multiple Roled Payees
 Payees with Multiple Claims

Activity List
 Claim Catastrophe Detail
 Claim Detail
 Claim Detail by Underwritten
 Claim Injury Detail
 Claims Aging
 Claims Processing Effective
 Claims by Catastrophe
 Claims by Catastrophe Over
 Claims by Injury Type
 Claims without Updates
 Current Overdue Activities
 First Payment Productivity
 Litigation Claim Detail
 Litigation Rate Trend
 Litigation Summary
 Loss Run
 Open Claims by LOB
 Overdue Activities
 Overdue Activities Rate
 Past 30 Day Claim Summar
 Reopened Claims List
 Subrogated Claims

Sample Report Formats

Table format

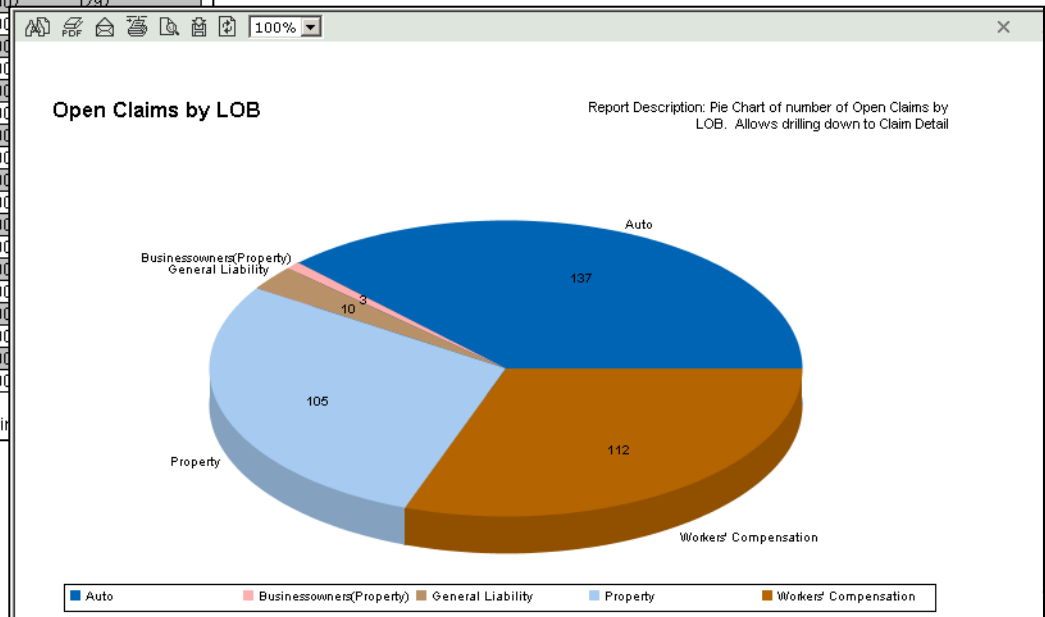
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Overdue Activities

Group: US-MV Normal Auto Adjusters
 Adjuster: Angel Espinoza
 LOB: ALL
 Loss Type: ALL
 Loss Cause: ALL
 Claim Number: ALL
 Days Overdue >= : 0

Adjuster	Claim Number	Activity Description	Activity Due Date	Days Overdue
Espinoza, Angel	000-00-100001	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100002	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100002	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100003	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100003	Review claim	03/17/2007	294
Espinoza, Angel	000-00-100004	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100004	Review claim	03/17/2007	294
Espinoza, Angel	000-00-100005	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100005	Review claim	03/13/2007	298
Espinoza, Angel	000-00-100006	Review claim	03/14/2007	297
Espinoza, Angel	000-00-100006	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100007	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100007	Review claim	03/14/2007	297
Espinoza, Angel	000-00-100008	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100008	Review claim	03/16/2007	295
Espinoza, Angel	000-00-100009	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100009	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100010	Review claim	03/16/2007	295
Espinoza, Angel	000-00-100011	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100011	Review claim	03/17/2007	294
Espinoza, Angel	000-00-100012	Review claim	03/12/2007	299
Espinoza, Angel	000-00-100012	Review claim	03/16/2007	295
Espinoza, Angel	000-00-100013	Review claim	03/11/2007	300
Espinoza, Angel	000-00-100013	Review claim	03/13/2007	298
Espinoza, Angel	000-00-100014	Review claim	03/13/2007	298
Espinoza, Angel	000-00-100014	Review claim	03/15/2007	296
Espinoza, Angel	000-00-100015	Review claim	03/11/2007	300

Report generated at Jan 5, 2008 3:19:16 PM



Pie graph format

Report Parameters

Page 1 of 2

Overdue Activities

Activity Group: US-MW Normal Auto Adjusters
 Activity Owner: Dana Evans
 LOB: ALL
 Loss Type: ALL
 Loss Cause: ALL
 Claim Number: ALL
 Days Overdue >= : 0

Activity Group	Activity Owner	LOB
US-MW Normal Auto Adjusters	Evans, Dana	Auto
US-MW Normal Auto Adjusters	Evans, Dana	Auto
US-MW Normal Auto Adjusters	Evans, Dana	Auto
US-MW Normal Auto Adjusters	Evans, Dana	Auto
US-MW Normal Auto Adjusters	Evans, Dana	Auto
US-MW Normal Auto Adjusters	Evans, Dana	Auto

Report

OK

Activity Group: US-MW Medical WC Adjusters
 US-MW Normal Auto Adjuster
 US-MW Normal Liability Adjuster

Activity Owner: Duff, Brooke
 Evans, Dana
 Evans, Rachel

LOB: Auto
 General Liability
 Property

Loss Type: Auto
 General Liability
 Property

Loss Cause: Assault or battery
 Collision with fixed object
 Collision with motor vehicle

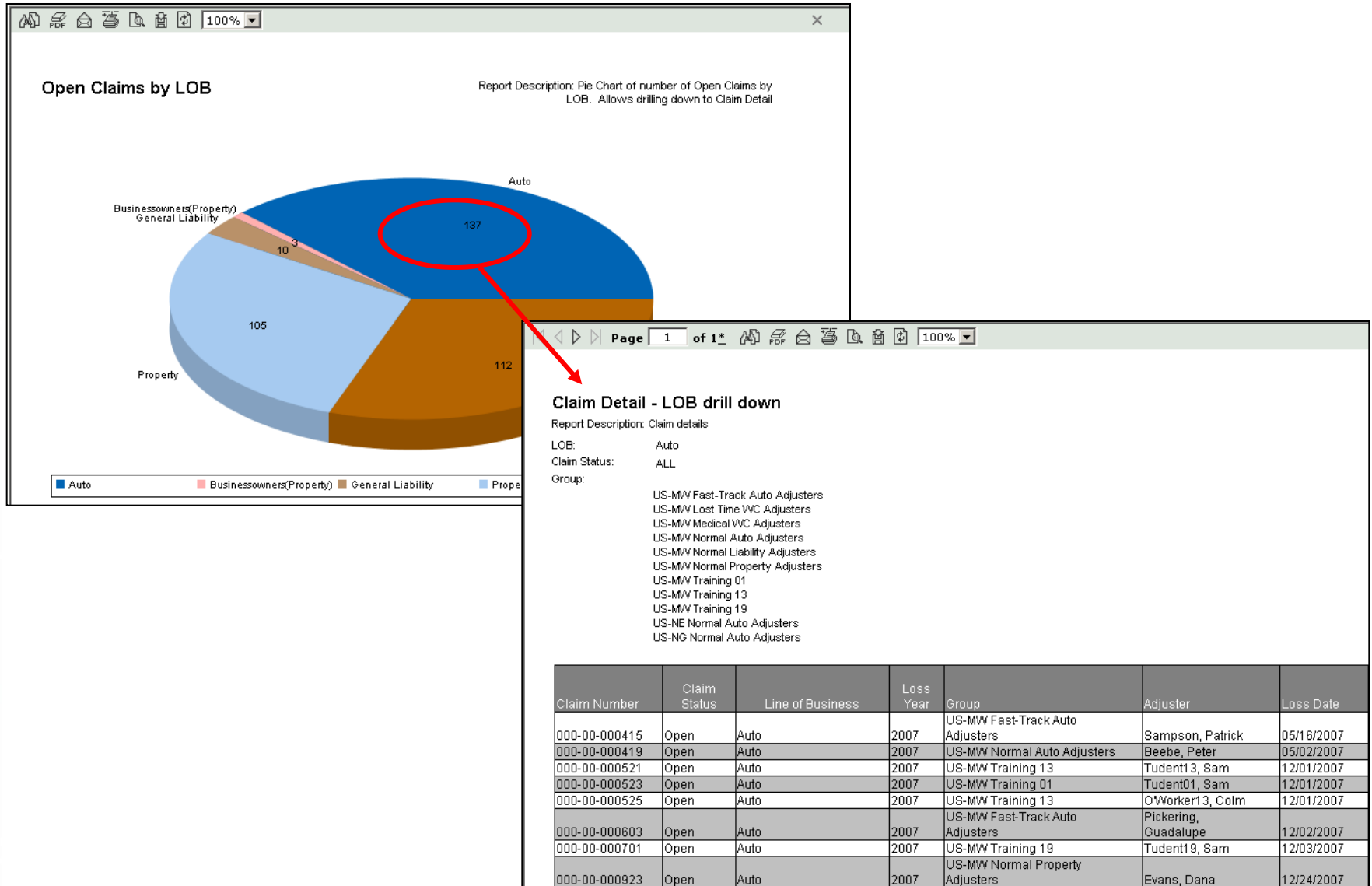
Claim Number:

Days Overdue >= : 0

OK

Collision with fixed object	000-00-100001
Collision with fixed object	000-00-100007
Collision with fixed object	000-00-100007
Collision with fixed object	000-00-100013
Collision with fixed object	000-00-100013

Drilldown Reports



Report Administration

Report Admin (1 - 2 of 2)

Permission Sets Reports

Sync Delete Toggle Document Report Status

Report	Removed
<input type="checkbox"/> ClaimCenter	
<input type="checkbox"/> Claims	
<input type="checkbox"/> Activity List	
<input type="checkbox"/> Claim Catastrophe Detail	
<input type="checkbox"/> Claim Detail	
<input type="checkbox"/> Claim Detail by Underwriter	
<input type="checkbox"/> Claim Injury Detail	
<input type="checkbox"/> Claims Aging	
<input type="checkbox"/> Claims Processing Effectiveness	
<input type="checkbox"/> Claims by Catastrophe	
<input type="checkbox"/> Claims by Catastrophe Overview	
<input type="checkbox"/> Claims by Injury Type	No
<input type="checkbox"/> Claims without Updates	No
<input type="checkbox"/> Current Overdue Activities	
<input type="checkbox"/> First Payment Productivity	
<input type="checkbox"/> Litigation Claim Detail	
<input type="checkbox"/> Litigation Rate Trend	
<input type="checkbox"/> Litigation Summary	
<input type="checkbox"/> Loss Run	
<input type="checkbox"/> Open Claims by LOB	
<input type="checkbox"/> Overdue Activities	
<input type="checkbox"/> Overdue Activities Rate	
<input type="checkbox"/> Past 30 Day Claim Summary	
<input type="checkbox"/> Reopened Claims List	No

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

▶ Report administrators can

- Control which reports will display in the Report tab menu
- Determine which reports are visible to a Report security profile

Report Admin (1 - 2 of 2)

Permission Sets Reports

Add Report Permission Set Delete

Name	Reports
<input type="checkbox"/> reportmanager	ClaimCenter/Claims/Activity List ClaimCenter/Claims/Claim Catastrophe Detail ClaimCenter/Claims/Claim Detail ClaimCenter/Claims/Claim Detail by Underwriter ClaimCenter/Claims/Claim Injury Detail

Lesson Objectives Review

You should now be able to:

- Describe how lists can be used for "ad hoc" reporting
- Describe the functionality of the ClaimCenter Standard Reporting feature

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