

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.

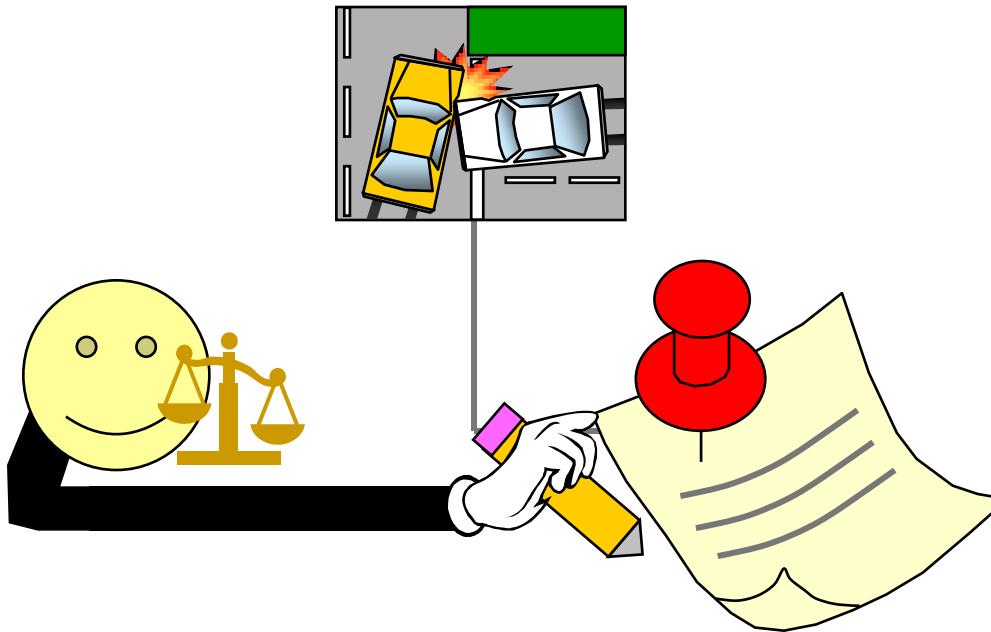
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.

If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

Lesson Outline

- ▶ Notes Basics
- ▶ Working with Notes

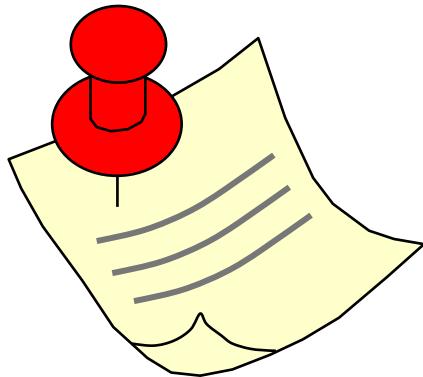
Notes



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

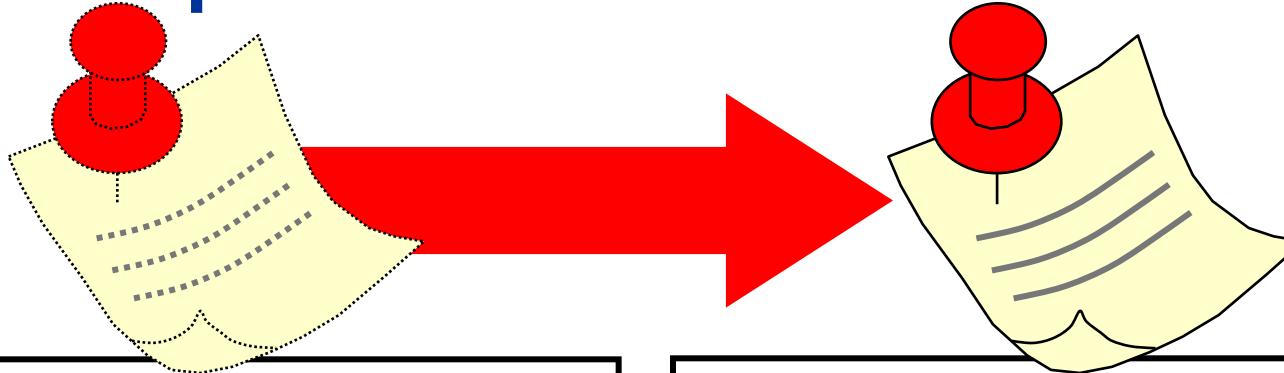
Note Fields



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

The screenshot shows a software interface for viewing notes on a claim. The top navigation bar includes links for Desktop, Search, Address Book, Claim (235-53-373870), Vacation, and Go to (Alt+/). Below the navigation is a status bar showing Pol: 53-263535, Ins: Mark Henderson, DoL: 01/26/2008, St: Open, and Adj: Betty Baker (Auto1 - TeamA).

On the left, a sidebar lists various actions: Summary, Workplan, Loss Details, Exposures, Parties Involved, Policy, Financials, and Notes. The 'Notes' link is highlighted with a red box and has a red arrow pointing to the 'Search' button in the main search area.

The main area is titled 'Notes' and displays search filters: Find Text, Author (Any), Related To (Any), Topic (Any), Date Range (Since Any, From ..., To ...), and Sort By (Date, Ascending, Descending). Below the filters are 'Search' and 'Reset' buttons.

The results section is titled 'Notes (1 - 3 of 3)'. It lists two entries:

- 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.
- 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

The screenshot illustrates the process of adding a note to a claim. It consists of two main parts:

- Top Panel:** A dropdown menu titled "Actions" with the option "New ..." highlighted. Below it is a list of categories: Note, Email, Matter, Evaluation, and Negotiation. The "Note" option is circled in red, and a red arrow points from this circle down to the corresponding entry in the list.
- Bottom Panel:** A detailed "Note" creation form. The title bar says "Note". The form fields are:
 - Topic:** Investigation (marked with an asterisk)
 - Security Type:** Public
 - Subject:** Witness has nothing to report
 - Related To:** Helen Nixon (marked with an asterisk)
 - Confidential:** No (marked with an asterisk)
 - Text:** A large text area containing the following 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.

Adding Notes via an Activity

Activity

Activity Detail for Claim 000-00-000203

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

Details

Subject	* Vehicle salvage opportunity
Description	Salvage Vehicle
Related To	none (Claim)
Due Date	* 05/06/2008
Escalation Date	05/07/2008
Priority	* Normal
Calendar Importance	* Medium
Mandatory	No
Status	Open
Externally Owned	* <input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<none selected>

Activity Assignment

Assigned To	Jill Randolph
Assigned Group	Western Salvage Unit
Assigned By	Jill Randolph
Assign Date	05/19/2008

Documents

Remove Name View Type Status Author Date Modified

New Note

Topic	<none selected>
Security Type	<none selected>
Subject	Vehicle in impound yard
Related To	(1) 1st Party Vehicle - Allen Robertson
Confidential	<input type="radio"/> Yes <input checked="" type="radio"/> 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.

Activity Tracking

Completion/Skipped date	
Completed by	
Recurring	No

Using a Note Template

The diagram illustrates the process of using a note template. It begins with a 'Note' dialog box containing fields for Topic, Security Type, Subject, Related To, Confidential, and Text. A red box highlights the 'Use Template' button. A red arrow points from this button to a 'Find Note Template' search dialog. This search dialog has fields for Topic, Type, Line of business, and Keywords, along with 'Search' and 'Reset' buttons. A red box highlights the 'Select' button next to the first template listed in the results table. Red arrows point from the 'Select' button to the 'Subject' field in the main 'Note' dialog and to the 'Text' field in the same dialog, indicating that the template's subject and text will be populated into the respective fields.

Note

Update Cancel Use Template

Topic: General
Security Type: <none selected>
Subject:
Related To: none (Claim-level)
Confidential: No
Text:

Find Note Template (Return to Note)

Cancel

Topic: <none selected>
Type: <none selected>
Line of business: Auto
Keywords:

Search Reset

Template	Topic
Accident Report	Investigation
Status Report	General

Note

Update Cancel Use Template

Topic: Investigation
Security Type: <none selected>
Subject: Accident report on 2008-05-21
Related To: none (Claim-level)
Confidential: No
Text: Accident report by: Betty Baker
When did the accident occur?
Where did the accident occur?

Editing Notes

Notes

Find Text: Since Sort By:

Author: Date Range: Since From To

Related To: Topic:

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)		

A red arrow points from the "Edit" link in the Notes list to the "Edit Note" dialog.

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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