

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.

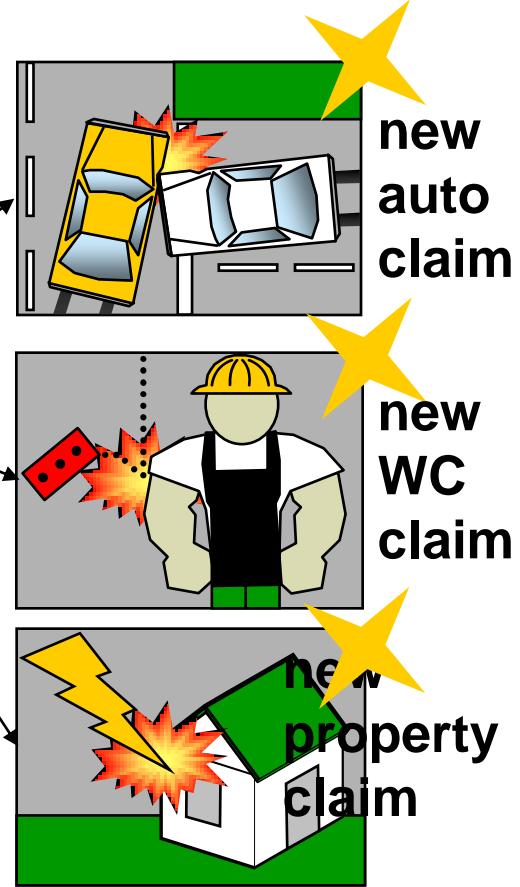
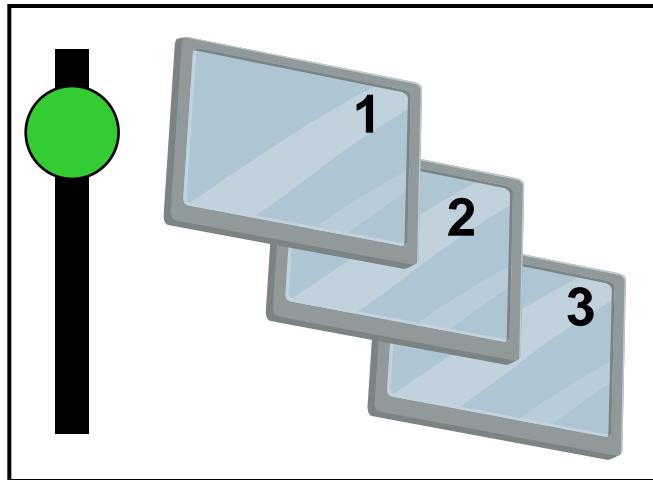
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.

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

<p>Step 3 of 5: Add claim information</p> <p>Cancel < Back Next > Finish</p> <p>What Happened? City bus driver swerved to avoid hitting a pedestrian and rear-ended the insured</p> <p>Date of Loss 03/24/2008 12:00 AM</p> <p>Loss Cause * Collision with train or bus</p> <p>Incident Only? <input type="checkbox"/> Incident Only</p> <p>Vehicles, People, & Property</p> <p>Add Vehicle Add Pedestrian Add Property Damage</p> <p>1996 Toyota Corolla</p> <p>At the Scene</p> <p>Witnesses Add Remove</p> <p>* Name: Edna Kravitz Statement Obtained: No Where was witness?: Pedestrian</p> <p>Categorization</p> <p>Fault Rating: Other party at fault</p> <p>Weather: Clear</p> <p>Catastrophe: <none selected></p> <p>Special Claim Permission: <none selected></p>	<p>Step 3 of 8: Add claim information</p> <p>Cancel < Back Next > Finish</p> <p>Claim Policy</p> <p>Policy Number: 23-502011</p> <p>Policy Status: In force</p> <p>General</p> <p>Line of Business: * Property</p> <p>Loss Type: Property</p> <p>Catastrophe: <none selected></p> <p>Special Claim Permission: <none selected></p> <p>Description</p> <p>Improperly installed sprinkler leaked and damaged merchandise in storage and equipment</p> <p>Loss Details</p> <p>Loss Cause: * Water damage</p> <p>Fault Rating: <none selected></p> <p>Date of Loss: 03/24/2008 12:00 AM</p> <p>Properties</p> <p>Add Remove</p> <p>Address: 2103 Veterans Pkwy. City: Bloomington State: Illinois</p>
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Two Levels of Depth

The screenshot displays two windows of a Guidewire application, illustrating the 'Two Levels of Depth' for claim creation.

Top Window: Step 5 of 5: Save and Assign Claim

- Left Panel:** A sidebar titled "Actions" contains a "New Claim Wizard" section with the following items:
 - [Find Policy](#)
 - [Basic Info](#)
 - [Loss Details](#)
 - [Services](#)
 - Save & Assign Claim** (highlighted with a red circle)
- Right Panel:** The main area is titled "Assignment". It includes two radio button options:
 - Assign Claim To
 - Assign Claim To

Bottom Window: Step 2 of 2: Quick Claim Auto

- Left Panel:** A sidebar titled "Actions" contains a "New Claim Wizard" section with the following items:
 - [Find Policy](#)
 - Quick Claim Auto** (highlighted with a red circle)
- Right Panel:** The main area is titled "Step 2 of 2: Quick Claim Auto". It shows the following data:

Reported By	
Name	* Ray Newton
Relation to Insured	* Self
Primary Phone	818-446-1206
Address	287 Kensington Rd. #1A, South P
Claim Policy	
Policy Number	54-123456
Policy Status	In force
General	
Line of Business	* Auto
Loss Type	Auto

Text Labels:

- Full wizard captures greater amount of information** (red text, pointing to the top window)
- Quick wizard can be done more rapidly** (red text, pointing to the bottom window)

Two Sets of Wizard Steps

ordered

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

What Happened?

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

Loss Cause * <none selected>

Incident Only? Incident Only

Vehicles, People, & Property

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

 [1997 Saturn SL](#) ▾

independent

Step-By-Step Validation

The screenshot shows the 'New Claim Wizard' interface. On the left, a sidebar lists steps: 'Actions', 'New Claim Wizard' (selected), 'Find Policy', 'Basic Info' (highlighted with a green dot), 'Loss Details', 'Services', 'Save & Assign Claim', 'Parties Involved', and 'Policy'. The main area is titled 'Step 2 of 5: Basic information'. A yellow error bar at the top says 'Name : Missing required field "Name"'. Below it are buttons for 'Cancel', '< Back', and 'Next >'. The 'Reported By' section includes fields for 'How Reported' (set to 'Phone'), 'Name' (set to '<none selected>'), 'Relation to Insured' (set to 'Self'), and 'Date of Notice' (set to '03/27/2008'). A blue link 'Insured' is visible below the date field.

- ▶ 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 screenshot shows the 'New Claim Wizard' interface with three completed steps:

- Step 3 of 5: Add claim information**: Fields include 'What Happened?' (empty text area), 'Date of Loss' (03/24/2008 12:00 AM), and 'Loss Cause' (Theft of entire vehicle). The 'Finish' button is highlighted.
- Step 4 of 5: Services**: Shows 'Covered Vehicles' (1997 Saturn SL) and the 'Finish' button is highlighted.
- Step 5 of 5: Save and Assign Claim**: Shows 'Assignment' options (Assign Claim To) and the 'Finish' button is highlighted.

A large red arrow points from the bottom right of the third step to a success message box:

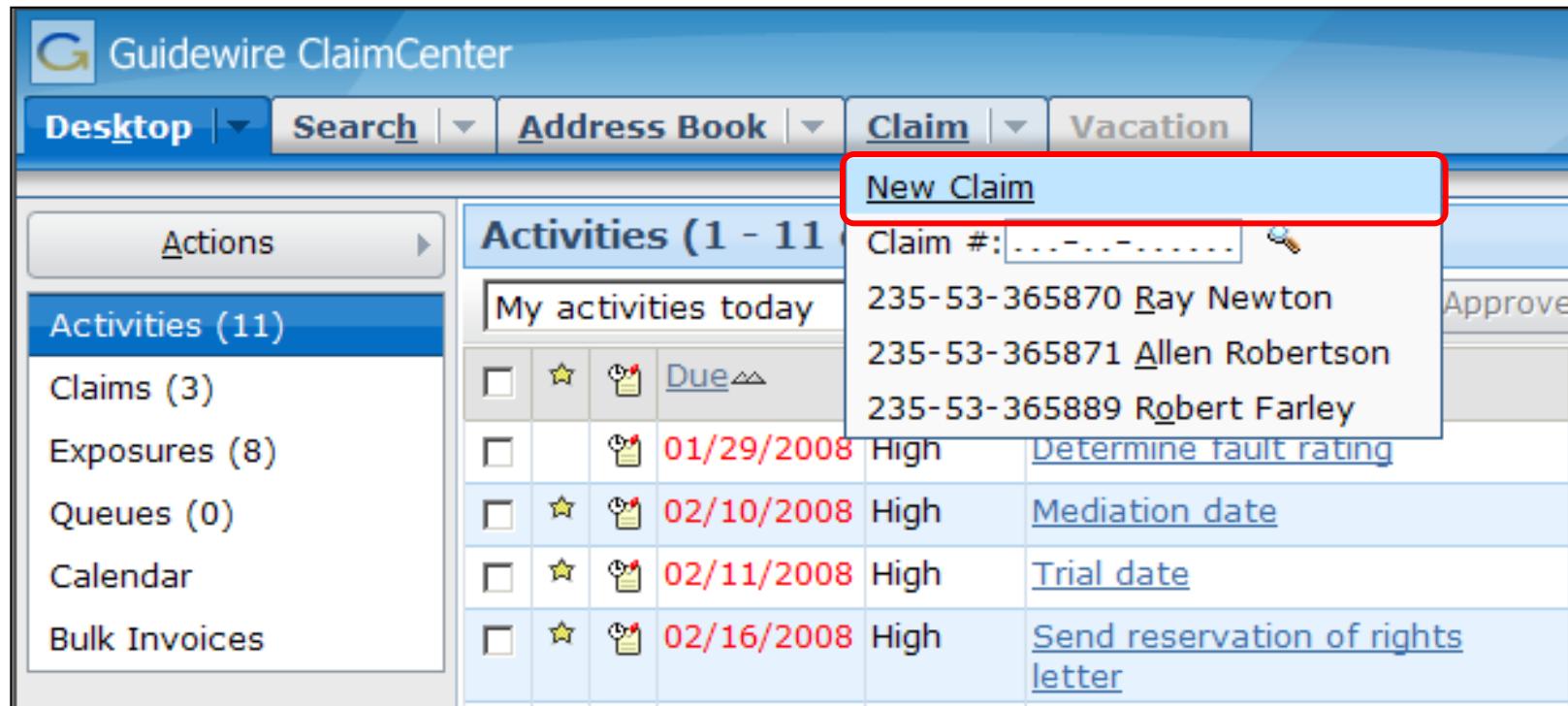
New Claim Saved

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

	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

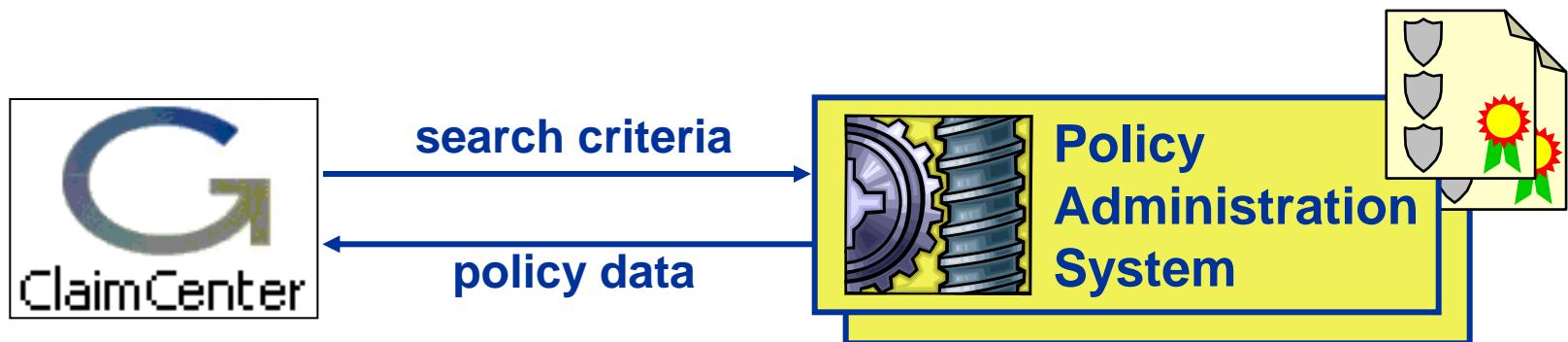
Type of Claim * Auto
 Auto - Auto First and Final
 Auto - Quick Claim Auto

Claims History

Status	Claim
Open	235-53-365870



Policy 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

Step 1 of 5: Search or Create Policy

Find Policy Create Unverified Policy

Policy #

First Name Ray

Last Name Newton

Organization Name

Policy Type Personal auto

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 Fin
 Auto - Quick Claim Auto

Date: 2008

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					

03/24/2008

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

Choosing the Wizard Type

Step 1 of 5: Search or Create Policy

[Cancel](#) | [Next >](#)

Find Policy Create Unverified Policy

Policy #

First Name

Last Name

Organization Name

Policy Type

Loss Date

[Search](#) [Reset](#)

	Policy #	Insured	Address
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

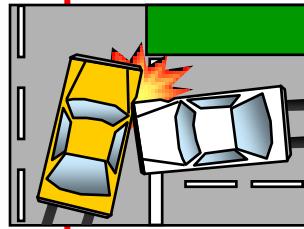
Lesson Outline

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- ▶ Full Claims
- ▶ Quick Claims
- ▶ Incomplete Claims

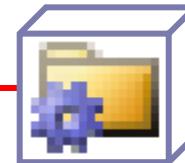
Temporary Claim Number Generation

Step 1 of 5: Search or Create Policy

[Cancel](#) [Next >](#)



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

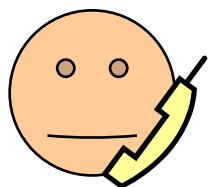


- ▶ Generated after first step
- ▶ Used to track claim in draft status
- ▶ Typically not displayed

Step 2 of 5: Basic information

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

Identifying Primary Contact and Involved Vehicle



New Claim Wizard

Step 2 of 5: Basic information

Cancel | < Back | Next >

Reported By

How Reported: Phone
Name: <none selected>
Relation to Insured: <none selected>
Date of Notice: 09/18/2009

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)

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

Actions

Find Policy
Basic Info
Loss Details
Services
Save & Assign Claim

Parties Involved
Policy
Policy General
Policy Details
Documents
Notes

- ▶ 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

The screenshot shows the Guidewire ClaimCenter interface during the 'New Claim Wizard'. A red arrow points from the 'Duplicate Claims' section at the bottom to the 'Loss Details' section at the top right.

Top Navigation: Guidewire ClaimCenter, Desktop, Search, Address Book, Claim, Vacation, Unsaved Work, Help, About, Log Out, Go to (Alt+/)

Left Sidebar: New Claim Wizard, Basic Info (selected), Find Policy, Loss Details, Services.

Main Content:

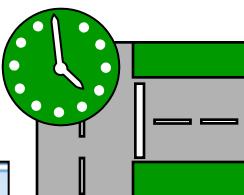
- Duplicate Claims:** Step 2 of 5: B
- Reported By:** How: Phone, Name: Ray Newton, Relation: Son.
- Loss Details:** (Return to Possible Duplicate Claims) (highlighted by a red box).
 - General: Auto, Auto, Andy Applegate, Auto1 - TeamA
 - Catastrophe: Catastrophe
 - Claim Segment: Auto - mid complexity
 - Claim Strategy: Auto - Fast Track
 - Special Claim Permission: Insured hit other party's car on the front passenger side while making a left turn.
- Vehicles:** Mazda 626 7FDG745, Saturn SL 1HGJ465.
- 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

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? 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](#) ▾

- ▶ 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 (2GDF)**

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

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

Service Needed

Rental

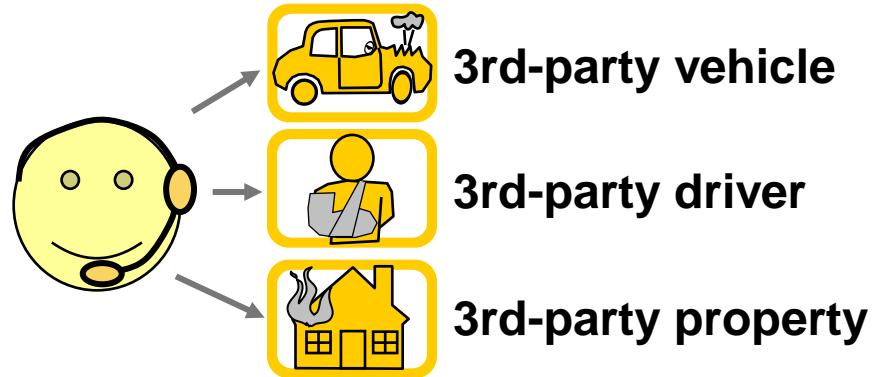
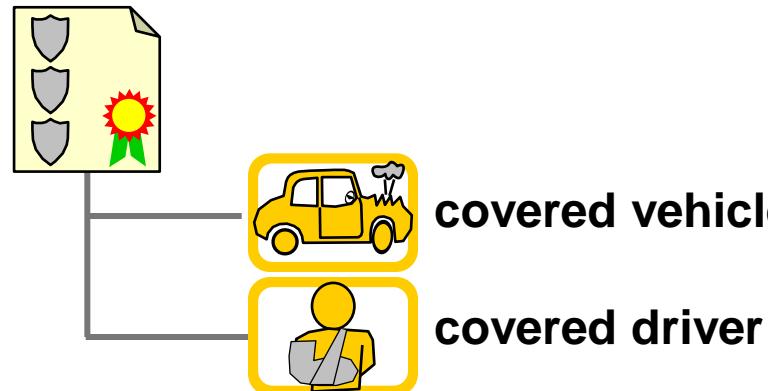
Towing

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

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?

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

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

Name	Roles	Contact Prohibited?	Phone
Jose & Juan-Carlos Repairs	Repair Shop	No	312-773-9263
Edward Barrowman	Primary Addressee		
Karen Egertson	Agent		
Brian Newton	Excluded Party		
Ray Newton	Insured, Main Contact, Repairer, Driver, Injured Person		
Stan Newton	Covered Party		

Policy Details

Review the details of this policy

Vehicles (1 - 2 of 2)

#	Make	Model	Year	VIN
1	Saturn	SL	1997	1GV234TV347463345
2	Toyota	Corolla	1996	3DGF78575GD892534

Endorsements (1 - 3 of 3)

#	Description
PP 03	Towing and Labor Costs Coverage

Documents

Review the documents for this claim.

Name	Actions
RTD Contact Info	

Notes

Edit Print	Date	Time
Author	Andy Applegate	Mar 27, 2008
Topic	Coverage	12:42 PM
Related To	none (Claim-level)	Question about rental coverage
		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

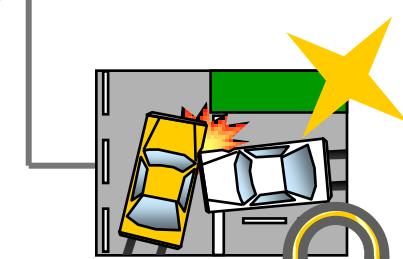
New Claim Saved

Claim 000-00-000038 has been successfully saved.

Assigned Group: Auto1 - TeamA

Assigned User: Andy Applegate

FNOL Snapshot



The screenshot shows the FNOL Snapshot interface. At the top, there's a header bar with icons and text: 'Pol: 54-123456 | Ins: Ray Newton | DoL: 09/18/2009 | St: Open | Adj: Andy Applegate (Auto1 - T...'. Below this is a navigation menu on the left with items like 'Actions', 'Summary', 'Workplan', 'Loss Details', 'Exposures', 'Parties Involved', 'Policy', 'Financials', 'Notes', 'Documents', 'Plan of Action', 'Litigation', 'History', 'FNOL Snapshot' (which is highlighted in blue), and 'Calendar'. The main content area is titled 'Snapshot: Loss Details' and contains sections for 'General', 'Description', 'Loss Details', 'Notification and Contact', 'Loss Location', 'Vehicles', 'Properties', 'Injuries', and 'Officials'. Under 'Loss Details', it shows 'Loss Cause: Collision with motor vehicle', 'Fault Rating', 'Date of Loss: 09/18/2009 12:00 AM', 'Weather', and 'In Course of Employment?'. Under 'Notification and Contact', it shows 'Reported By: Ray Newton' and 'Main Contact: Ray Newton'. The 'Loss Location' section has fields for 'Location', 'Address Type', 'Valid until', 'Location Code', and 'Jurisdiction State'. The 'Vehicles' section shows a 'Make: Toyota' and 'Model: Corolla'. The 'Properties' section has a 'Type' field. The 'Injuries' and 'Officials' sections have dropdown menus.

- ▶ 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

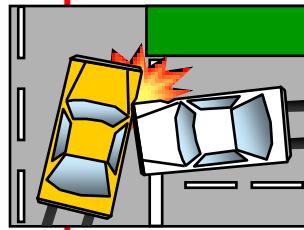
Lesson Outline

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

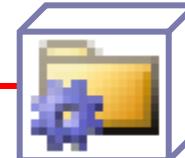
Temporary Claim Number Generation

Step 1 of 5: Search or Create Policy

[Cancel](#) [Next >](#)



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

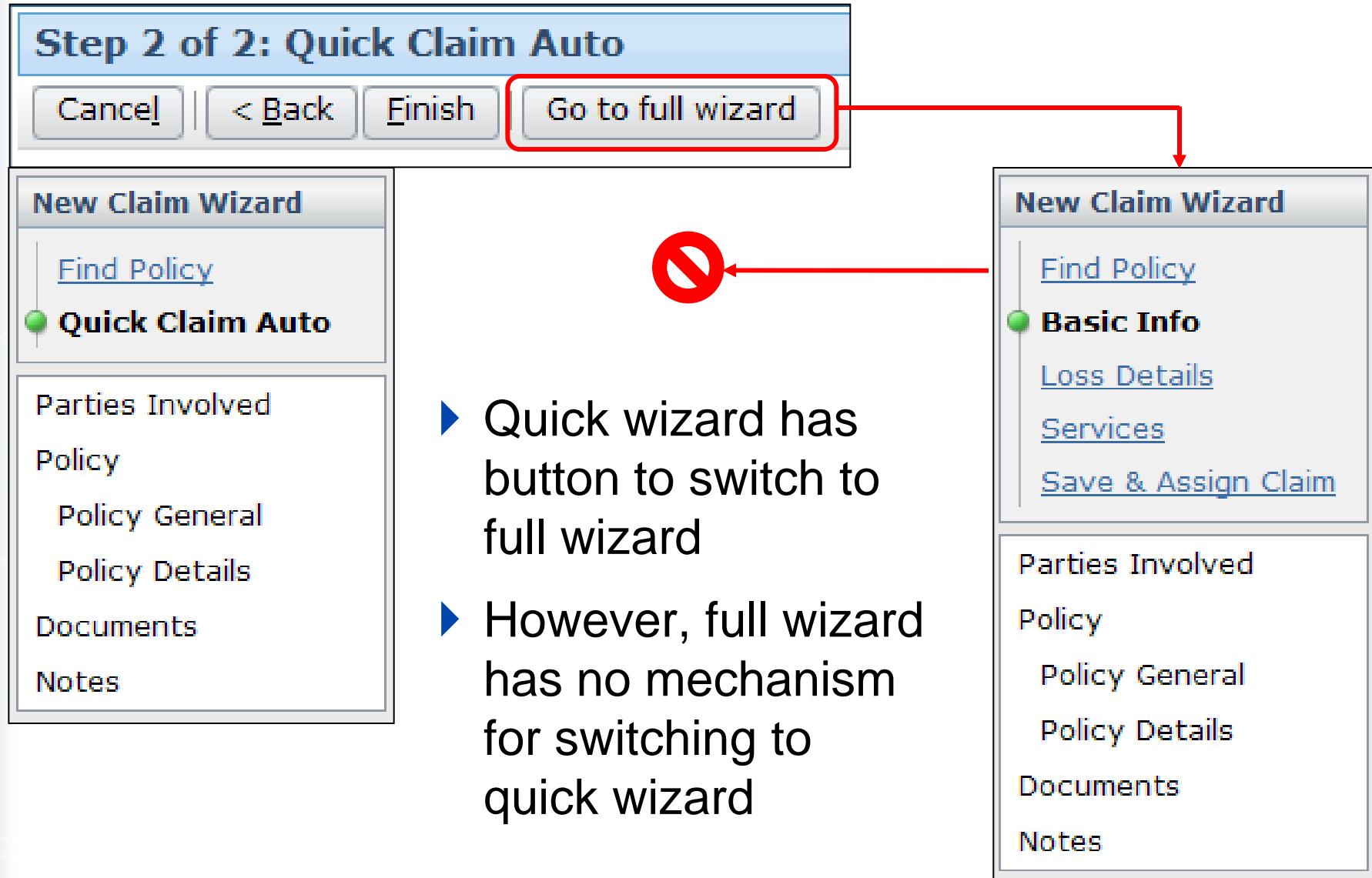


- ▶ Like full wizard claims, generated for quick wizard claims after the first step

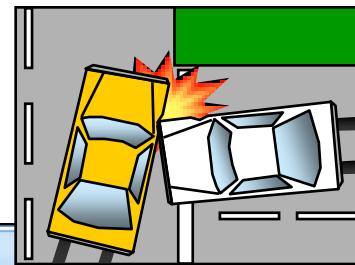
Step 2 of 2: Quick Claim Auto

[Cancel](#) | [< Back](#) | [Finish](#) | [Go to full wizard](#)

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: * <none selected>

Relation to Insured: * <none selected>

Primary Phone:

Address:

Claim Policy

Policy Number: 54-123456

Policy Status: In force

General

Line of Business: * Auto

Loss Type: Auto

Description

(Large text area)

Loss Details

Loss Cause: * <none selected>

Fault Rating: <none selected>

Date of Loss: 02/28/2008 12:00 AM

Date of Notice: * 03/27/2008

Incident Only?: * Yes No

Coverage in Question?: Yes No

Location

Location: New...

Address 1:

Address 2:

City: *

County:

State: * <none selected>

Zip Code:

Country: United States of America

Location Code:

Jurisdiction State: <none selected>

Vehicles

Add | Remove

Make | Model | Plate | State | Loss Party | Driver

Claim Assignment

Assign claim and all exposures to: Use automated assignment

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

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

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

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 Apply

	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

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

Step 3 of 5: Add claim information

Cancel | < Back | Next > | Finish

What Happened?

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

Loss Cause: * <none selected>

Incident Only? Incident Only

Location: New...

Address 1:

Address 2:

City: *

State: *

Zip Code:

Country: United States

Windows Internet Explorer

Do you really want to log out?
You have unsaved work that will be lost.
Click OK to log out or Cancel to return to ClaimCenter.

OK | Cancel

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



Navigating Away from a New Claim

New Claim Wizard

Existing Claim

Claim (000-00-000038)

Guidewire ClaimCenter

Desktop Search Address Book Claim Vacation

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

Step 3 of 5: Add claim information

Actions New Claim Wizard Find Policy Basic Info Loss Details

Cancel < Back Next > Finish

What Happened? 03/24/2008 12:00 AM <none selected> Incident Only

People, & Property Add Pedestrian Add Property Dam

New Claim

Claim #: 235-53-365870 Ray Newton 000-00-000045 Ray Newton 000-00-000038 Ray Newton

DoL: 03/24/2008 | St: Open | Adj: Andy Applegate (Auto1 - Team)

Actions Summary Workplan Loss Details Exposures Parties Involved Policy Financials Notes Documents Plan of Action

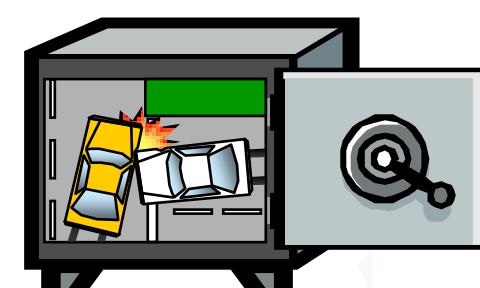
Summary

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

Financials Remaining Future Total Paid

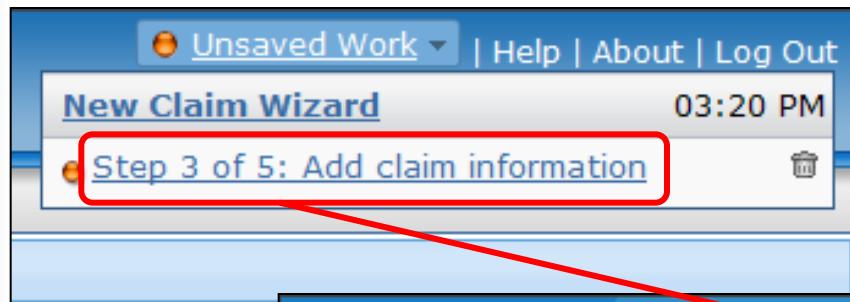
Exposures

Parties Involved Latest Notes (1 o)



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New Claims in the Unsaved Work Menu



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

A screenshot of the 'Step 3 of 5: Add claim information' wizard. The top navigation bar includes 'Saved Work', 'Desktop', 'Search', 'Address Book', 'Claim' (which is currently selected), and 'Vacation'. The main content area shows the policy number 'Pol: 54-123456', insurer 'Ins: Ray Newton', date of loss 'DoL: 03/24/2008', and status 'St: Draft'. On the left, a sidebar lists 'Actions', 'New Claim Wizard' steps ('Find Policy', 'Basic Info', 'Loss Details'), 'Loss Details' sub-options ('Services', 'Save & Assign Claim'), and 'Parties Involved' sections ('Policy', 'Policy General', 'Policy Details'). The right side contains fields for 'What Happened?' (text area), 'Date of Loss' (set to '03/24/2008 12:00 AM'), 'Loss Cause' (dropdown set to '<none selected>'), and 'Incident Only?' (checkbox). Below these are sections for 'Vehicles, People, & Property' with buttons for 'Add Vehicle', 'Add Pedestrian', and 'Add ...'. A decorative graphic of a car accident scene is visible in the bottom right corner.

Interrupted New Claims

Guidewire ClaimCenter

Desktop | Search | Address Book | Claim | Vacation

Claims Activities Checks Recoveries Bulk Invoices

Search Claims
Simple Search | Advanced Search

Claim # Policy # 54-123456

Search For Claimant First Name

Search Reset

Search Results (1 - 4 of 4)
Assign | Print/Export

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

Step 2 of 5: Basic information

Cancel | < Back | Next >

Reported By

How Reported Phone

Name Ray Newton

Relation to Insured Self

Date of Notice 03/27/2008

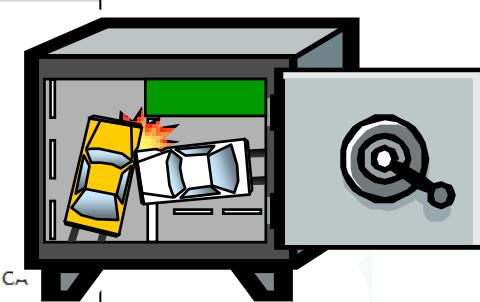
Verify Date of Birth

Date of Birth

Confirm Contact Info

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

Business Phone 818-446-1206 x....



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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