

Assignment

Lesson Objectives

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

- Identify the assignable objects
- Describe how assignment can be done at the group level
- Describe how assignment can be done at the user level (where the final owner is chosen by rules)
- Describe how assignment can be done at the user level (where the final owner is chosen by a user)

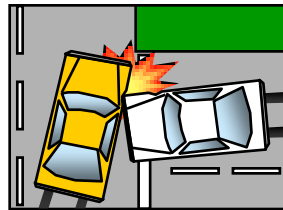
This lesson uses the notes section for additional explanation and information.
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.
If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

Lesson Outline

- ▶ Assignment Basics
- ▶ Group Assignment
- ▶ User Assignment via Rules
- ▶ User Assignment via Users

Assignable Objects

- ▶ An assignable object is an object that has work associated to it which must be completed by a user
- ▶ Four types of assignable objects in the base application:



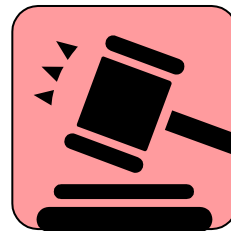
Claim



Exposure

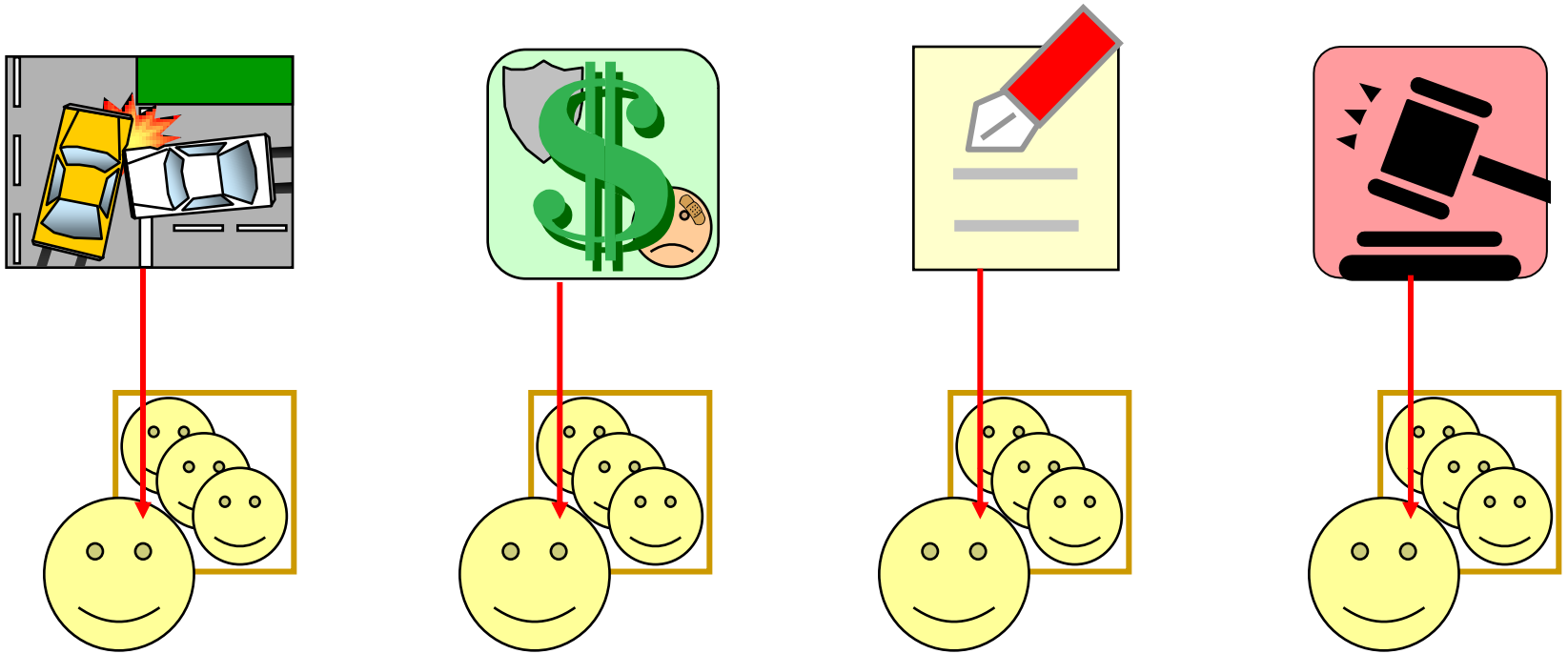


Activity



Matter

The Outcome of Assignment


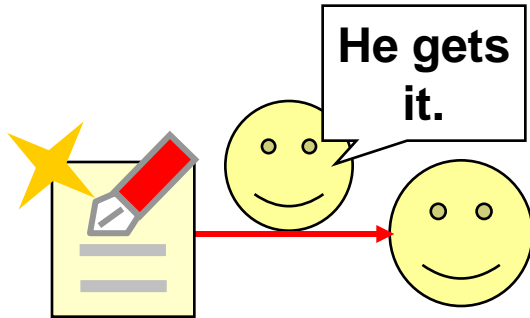
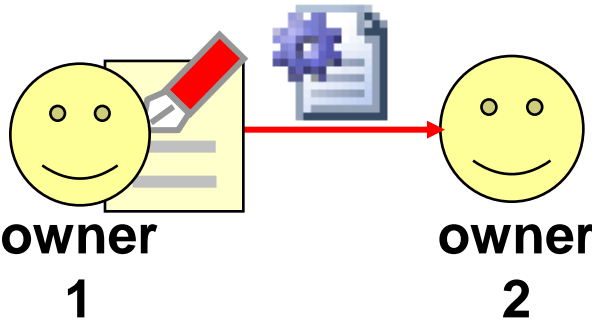
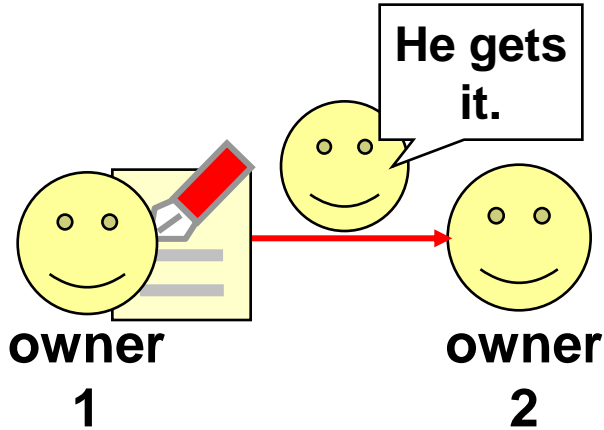


- ▶ Upon completion, assignable objects are assigned to a group and a user in that group

When and How Does Assignment Occur?

How is new owner chosen?

When is object assigned?

	Rule-Based Assignment	Explicit Assignment
Creation of New Object		
Reassignment of Existing Object		

Assigning a New Claim: Example



Step 5 of 5: Save and Assign Claim

Cancel

≤ Back

Finish

Assignment

☒ Assign claim and all exposures to: Use automated assignment  

Use automated assignment

Andy Applegate (Auto1 - TeamA)

☒ Assign claim and all exposures to: Use automated assignment  

Rules-Based Assignment

☒ Assign claim and all exposures to: Andy Applegate (Auto1 - TeamA)  

Explicit Assignment

Reassigning an Existing Claim: Example

The screenshot displays the 'Assign' dialog box in the Guidewire interface. The dialog box is titled 'Assign (Return to Summary)' and includes a 'Cancel' button. It prompts the user to 'Select how you would like to do the assignment' with two options: 'Select from list:' (selected) and 'Find a user or group:'. Under 'Select from list:', there is a dropdown menu set to 'Use automated assignment' and an 'Assign' button. The 'Find a user or group:' section contains search criteria for 'User' and 'Location'. The 'User' section includes fields for Last Name (dufraine), First Name, User name, Group Name (<none selected>), Role (<none selected>), and Attribute Name (<none selected>). The 'Location' section includes fields for City, State (<none selected>), ZIP Code (.....), and Country (<none selected>). Search and Reset buttons are at the bottom of the dialog.

The 'Actions' menu is visible in the background, showing options like Summary, Workplan, Loss Details, Exposures, Parties Involved, Policy, and Financials. The 'New Activity' section includes Correspondence, Interview, New Mail, Reminder, and Request. The 'New Transaction' section includes Reserve and Check. The 'New Exposure' section includes Choose by Coverage Type and Choose by Coverage. The 'Claim Actions' section includes Assign Claim, which is highlighted with a red box.

Reassigning an Existing Claim: Example, cont

Assign ([Return to Summary](#))
Summary | [Claim Status](#) | [Claim Health Metrics](#)

[Cancel](#)

Select how you would like to do the assignment

☒ Select from list: [v](#)

[Assign](#)

Rules-Based

Assign ([Return to Summary](#))
Summary | [Claim Status](#) | [Claim Health Metrics](#)

[Cancel](#)

Select how you would like to do the assignment

☒ Select from list: [v](#)

☐ Find a user or group:

Search For [User](#) [v](#)

Last Name

First Name

User name

Group Name [<none selected>](#) [v](#) [v](#)

Role [<none selected>](#) [v](#)

Attribute Name [<none selected>](#) [v](#)

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

Search Results (1 - 1 of 1)

	User v	Group	Page
Assign	William Dufraine	Midwest Property A	1

Explicit

Assign ([Return to Summary](#))
Summary | [Claim Status](#) | [Claim Health Metrics](#)

[Cancel](#)

Select how you would like to do the assignment

☐ Select from list:

☒ Find a user or group:

Search For [User](#) [v](#)

Last Name

First Name

User name

Group Name [<none selected>](#) [v](#) [v](#)

Role [<none selected>](#) [v](#)

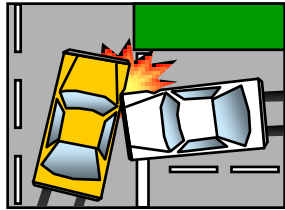
Attribute Name [<none selected>](#) [v](#)

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

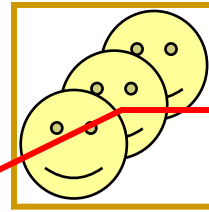
Search Results (1 - 1 of 1)

	User v	Group	Page
Assign	William Dufraine	Midwest Property A	1

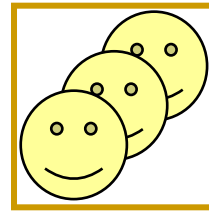
Two Phases of Assignment Rules



Claim 100-00-000027
location: California
seg: mid-complexity



**Western Normal
Auto Adjusters**



**Western Complex
Auto Adjusters**



Peter Beebe



Dana Evans



Leroy Martel



Irvin Hickman



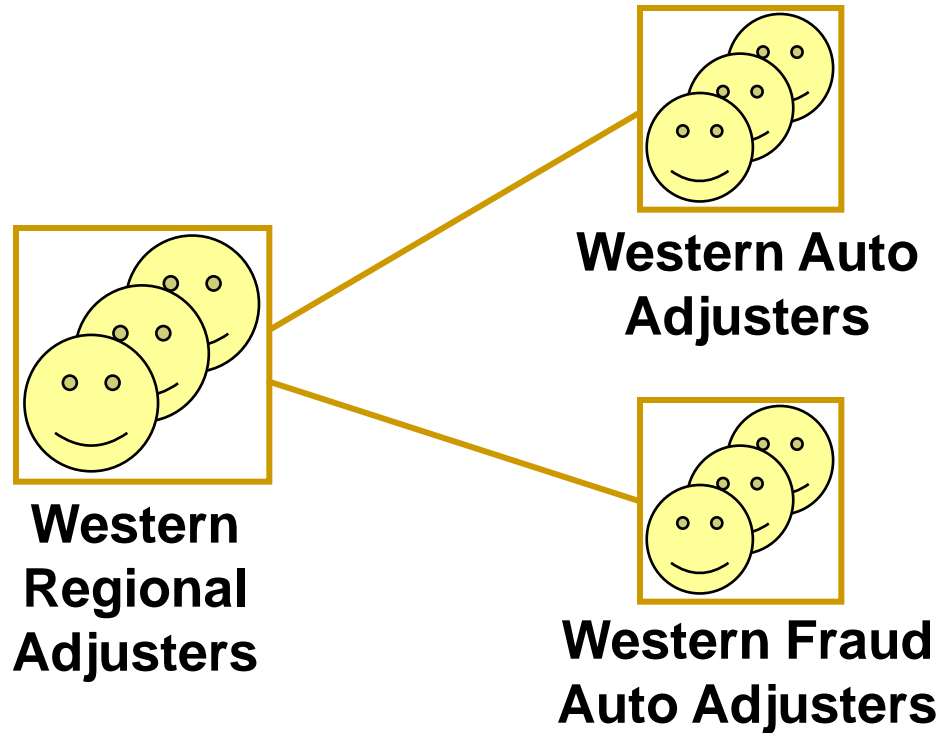
Elias Marr

- ▶ Automated assignment typically involves two phases
 - Group assignment
 - User assignment (to user within that group)

Lesson Outline

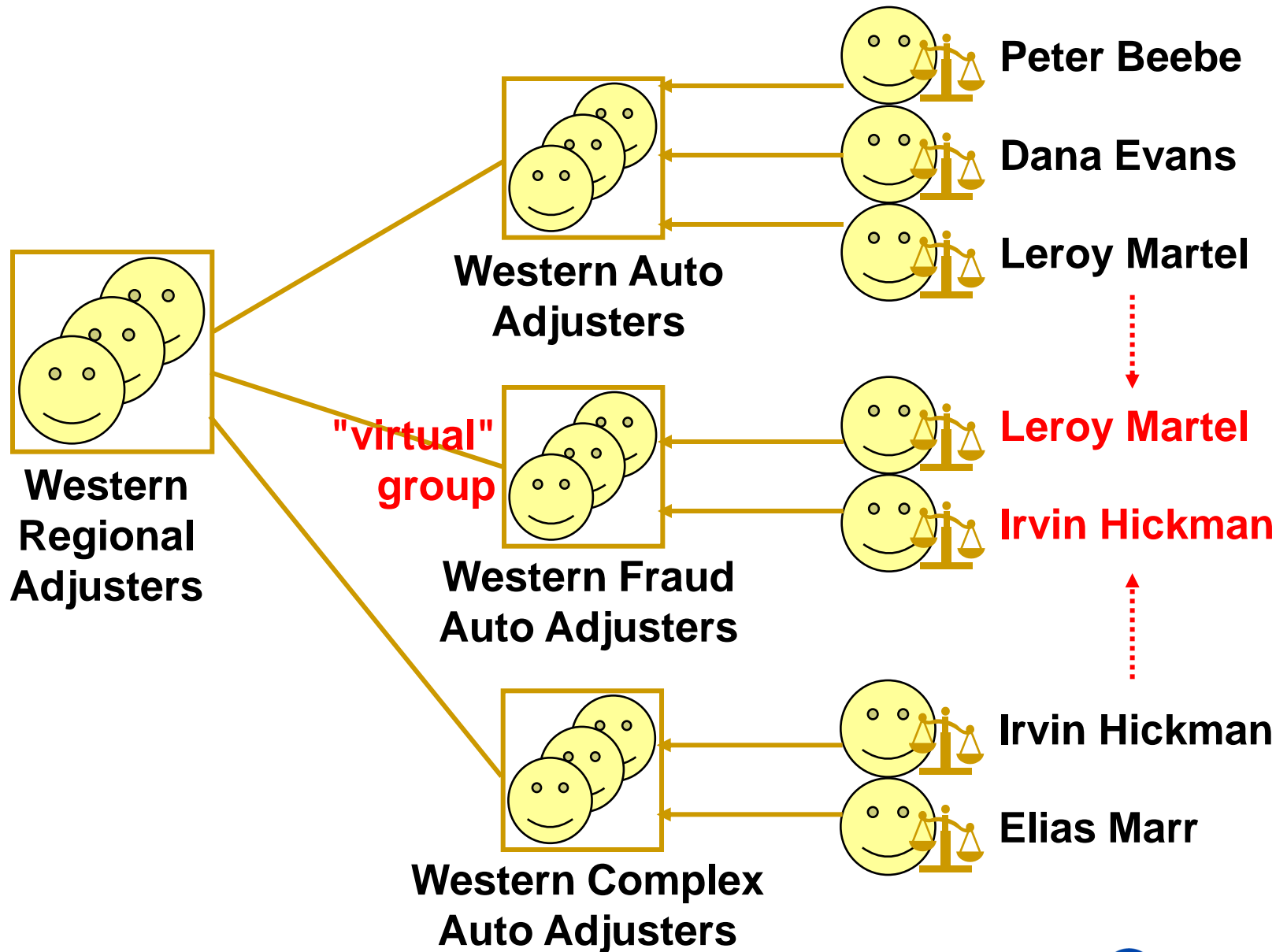
- ▶ Assignment Basics
- ▶ **Group Assignment**
- ▶ User Assignment via Rules
- ▶ User Assignment via Users

Groups



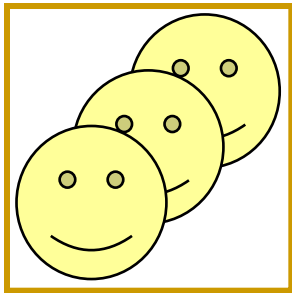
- ▶ A group is a collection of users who share a job function
 - The top-level group represents entire organization
 - Except for top-level group, every group has exactly one parent

Users in Groups



Group Attributes Related to Assignment

Midwest Normal Auto Adjusters

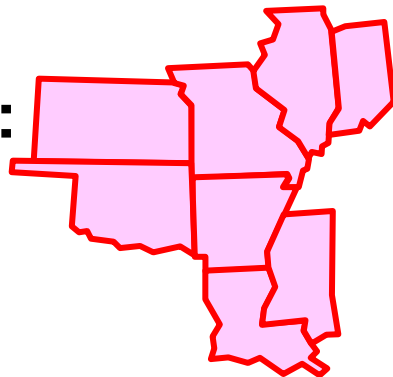


Type:

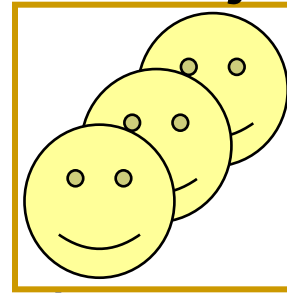


Auto
Normal

Regions:



Southeast Medical WC Adjusters

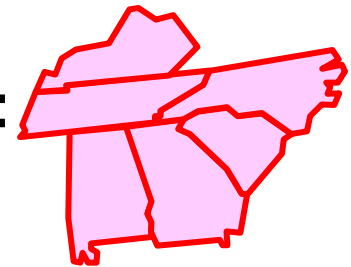


Type:



WC
Medical

Regions:



Group Type

Auto1 - TeamB	
Edit Delete	
Profile Queues Regions	
Name	Auto1 - TeamB
Type	Auto
Parent	Auto - Level1

LA Liability Adjusters	
Edit Delete	
Profile Queues Regions	
Name	LA Liability Adjusters
Type	Liability - complex
Parent	Los Angeles Claims Center

San Diego Vehicle Appraisers	
Edit Delete	
Profile Queues Regions	
Name	San Diego Vehicle Appraisers
Type	Auto damage appraisers
Parent	Los Angeles Claims Center

Western Salvage Unit	
Edit Delete	
Profile Queues Regions	
Name	Western Salvage Unit
Type	Salvage unit
Parent	Western Regional Claims Center

- ▶ Group type identifies function of group or job it performs

Group Region

Eastern States

Eastern Regional Claims Center

[Edit](#) [Delete](#)

[Profile](#) [Queues](#) [Regions](#)

Name	Areas Covered
Eastern Region	CT, DC, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, PR, RI, SC, VA, VT, WV

LA Area & Hawaii

Los Angeles Claims Center

[Edit](#) [Delete](#)

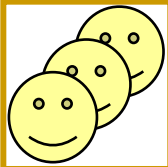
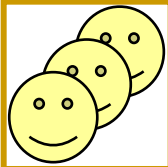
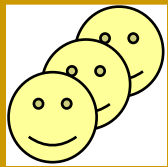
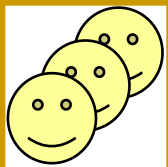
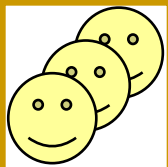
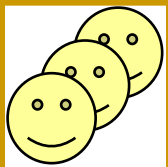

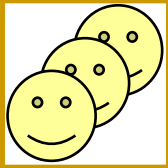

[Profile](#) [Queues](#) [Regions](#)

Name	Areas Covered
Los Angeles Claims Center - SoCal	CA:Imperial, CA:Kern, CA:Los Angeles, CA:Orange, CA:Riverside, CA:San Bernardino, CA:San Diego, CA:San Luis Obispo, CA:Santa Barbara, CA:Ventura
Los Angeles Claims Center - HI	HI

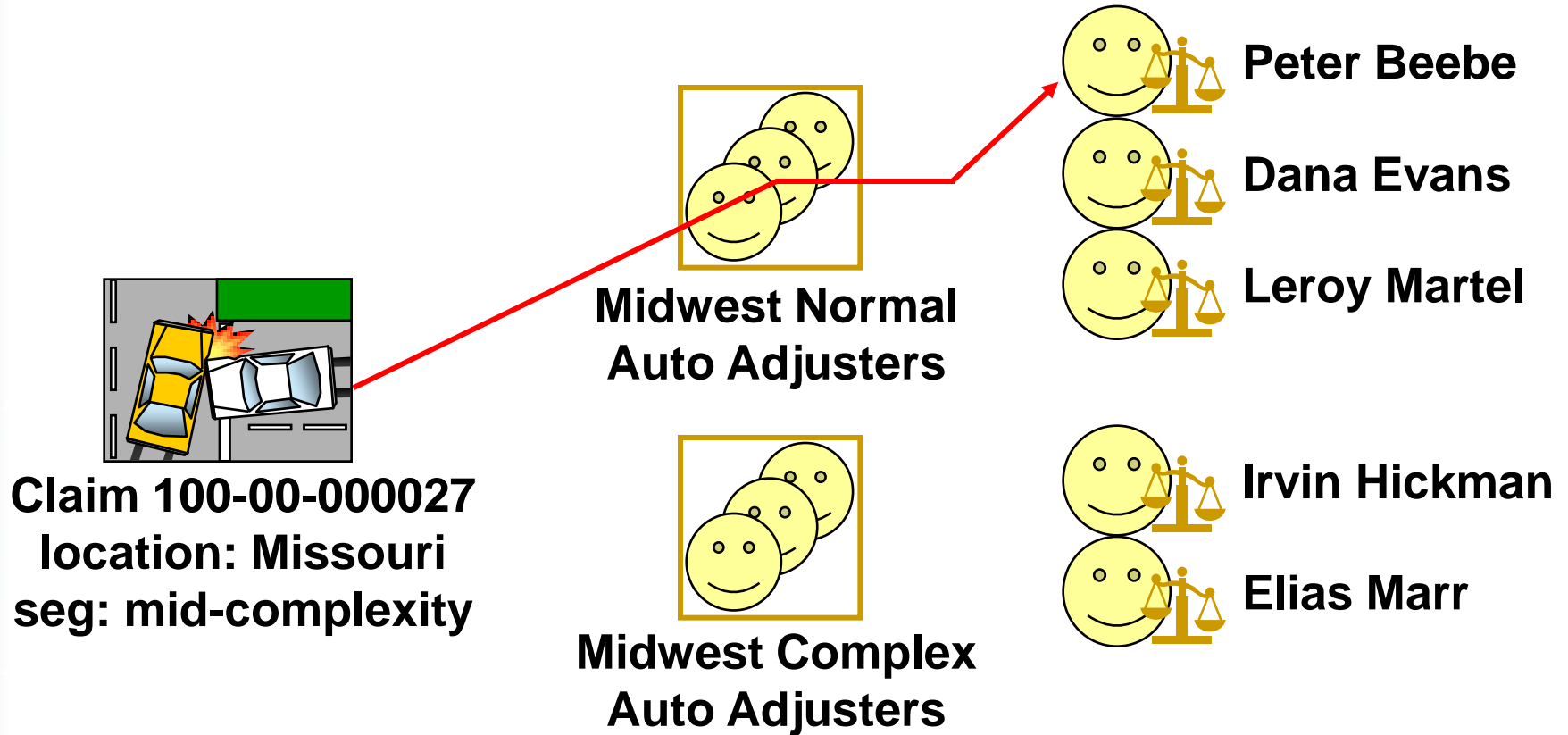
- ▶ A region is a geographic region, which can be based on locale-specific geographic entities such as cities or postal codes
- ▶ Groups can have one or more regions

Group Assignment Using Type and Region

if loss type = "auto" and segment is "fast track"
then assign to group of type "fast track auto"
where region = loss location region

		TYPE		
		fast track auto	normal auto	workers' comp
REGION	west	 fast track auto west	 normal auto west	 workers' comp west
	central	 fast track auto central	 normal auto central	 workers' comp central
	east	 fast track auto east	 normal auto east	 workers' comp east

Assignment Cannot Stop At the Group Level



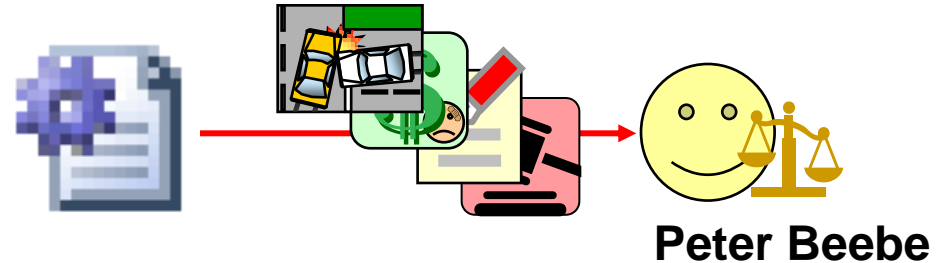
- Objects are not considered assigned until they are assigned to both group *and* user within that group

Lesson Outline

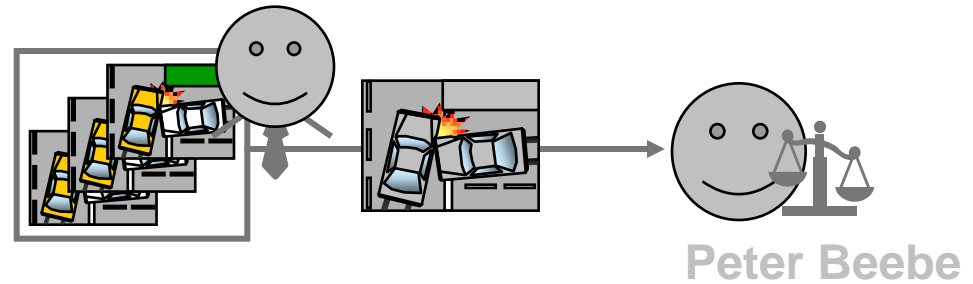
- ▶ Assignment Basics
- ▶ Group Assignment
- ▶ User Assignment via Rules
- ▶ User Assignment via Users

Who Decides Which User Within the Group Gets the Object?

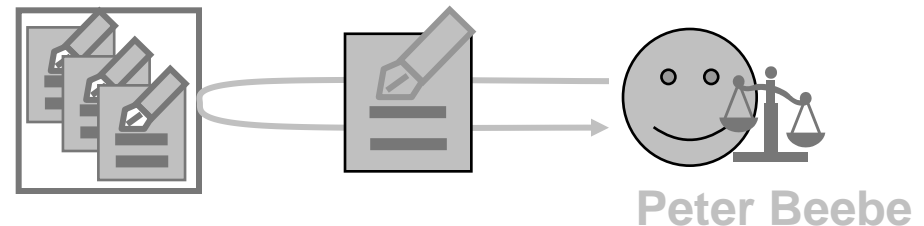
- ▶ Assignment rules



- ▶ Another user (typically a supervisor)



- ▶ The owner himself (when he/she takes ownership of an unassigned object)

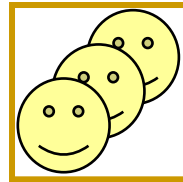


User Attributes Related to Rule Assignment

Peter Beebe



**Groups
& Load
Factors:**



**MW Normal
Auto Adjust.
(100)**

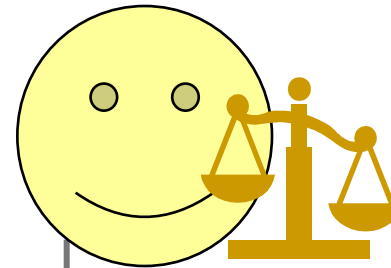
Attributes:



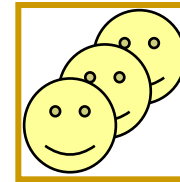
Regions:



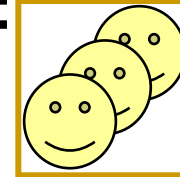
Leroy Martel



**Groups
& Load
Factors:**



**MW Normal
Auto Adjust.
(50)**



**MW Fraud
Auto Adjust.
(100)**

Attributes: (none)

Regions:



Group Assignment and Load Factors

LA Auto Adjusters

Edit

Delete

Profile

Queues

Regions

Name

Type

Parent

Supervisor

Security Zone

Users

LA Auto Adjusters

Auto - complex

[Los Angeles Claims Center](#)

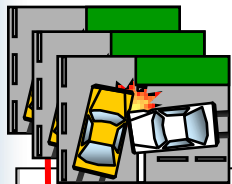
[Wesley Roosevelt](#)

[Auto and Property](#)

<input type="checkbox"/>	User △	Member	Manager	Load Perm	Load Factor
<input type="checkbox"/>	Scott Arthur	Yes	No	View	100
<input type="checkbox"/>	Isabel Harkin	Yes	No	View	100
<input type="checkbox"/>	Terence Johnson	Yes	No	View	100
<input type="checkbox"/>	Gwenn Kennedy	Yes	No	View	50
<input type="checkbox"/>	Wesley Roosevelt	No	No	View	

- ▶ Objects assigned to a group can be assigned using "round robin"
- ▶ Load factor weights how often objects are round-robined to that user

Group Assignment with Round Robin: Example



Name LA Auto Adjusters
 Type Auto - complex
 Parent [Los Angeles Claims](#)
 Supervisor [Wesley Roosevelt](#)
 Security Zone [Auto and Property](#)
 Users

<input type="checkbox"/>	User △
<input type="checkbox"/>	Scott Arthur
<input type="checkbox"/>	Isabel Harkin
<input type="checkbox"/>	Terence Johnson
<input type="checkbox"/>	Gwenn Kennedy
<input type="checkbox"/>	Wesley Roosevelt



Loss Details
[Loss Details](#) | [Associations](#) | [Special Investigation](#)

[Edit](#)

Claim 1

General

Loss Type Auto

Line of Business Auto

Primary Adjuster [Scott Arthur](#)

Loss Details
[Loss Details](#) | [Associations](#) | [Special Investigation](#)

[Edit](#)

Claim 2

General

Loss Type Auto

Line of Business Auto

Primary Adjuster [Isabel Harkin](#)

Loss Details
[Loss Details](#) | [Associations](#) | [Special Investigation](#)

[Edit](#)

Claim 3

General

Loss Type Auto

Line of Business Auto

Primary Adjuster [Terence Johnson](#)

Primary Group LA Auto Adjusters

User Attributes

Terence Johnson
User Details | [Activities](#) | [Claims](#) | [Exposures](#) | [Matters](#)

[Edit](#) | [Link](#)

[Basics](#) | [Profile](#) | [Authority Limits](#) | **[Attributes](#)** | [Regions](#)

<input type="checkbox"/>	Attribute △	Type △	State	Value
<input type="checkbox"/>	Auto Glass	Expertise		
<input type="checkbox"/>	Auto Mechanical	Expertise	California	
<input type="checkbox"/>	Spanish Speaker	Language		4

- ▶ Objects can be assigned to a user with a particular attribute (in a particular state and/or of a particular level)
 - If there are multiple users with the desired attribute(s), objects are round-robinmed among those users

User Attribute (with Round Robin): Example

if insured's language is Spanish
AND
 coverage subtype is glass damage

then assign to user with Auto Glass expertise
 and Spanish Speaker

(1) 1st Party Vehicle - Ray Newton

EditAssignClose Exposure

DetailsTotal Loss CalculatorISO

Exposure

Loss Party	Insured's loss
Primary Coverage	Collision
Coverage Subtype	Collision - Vehicle Damage
Coverage	1997 Saturn SL (1HGJ465 / California)
Adjuster	Terence Johnson
Group	LA Auto Adjusters

Terence Johnson

User DetailsActivitiesClaimsExposuresMatters

EditLink

BasicsProfileAuthority LimitsAttributesRegions

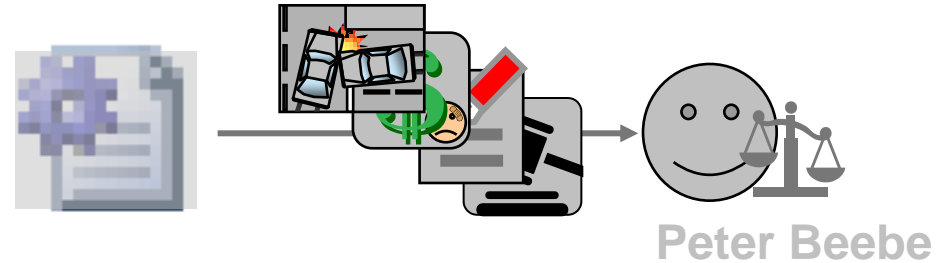
<input type="checkbox"/> Attribute	Type	State	Value
<input type="checkbox"/> Auto Glass	Expertise		
<input type="checkbox"/> Auto Mechanical	Expertise	California	
<input type="checkbox"/> Spanish Speaker	Language		4

Lesson Outline

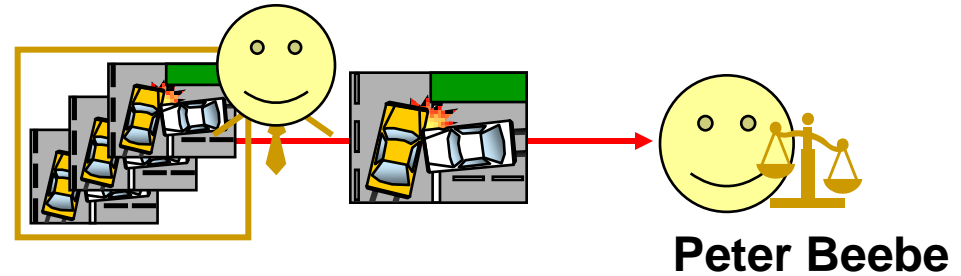
- ▶ Assignment Basics
- ▶ Group Assignment
- ▶ User Assignment via Rules
- ▶ **User Assignment via Users**

Who Decides Which User Within the Group Gets the Object?

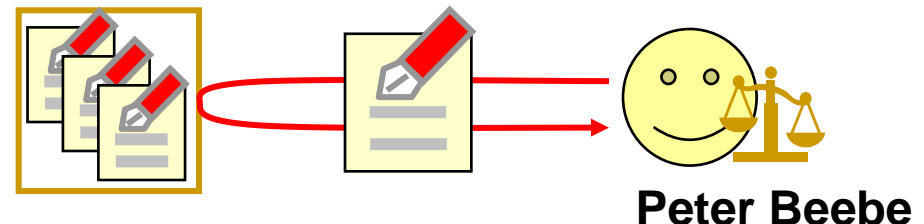
- ▶ Assignment rules



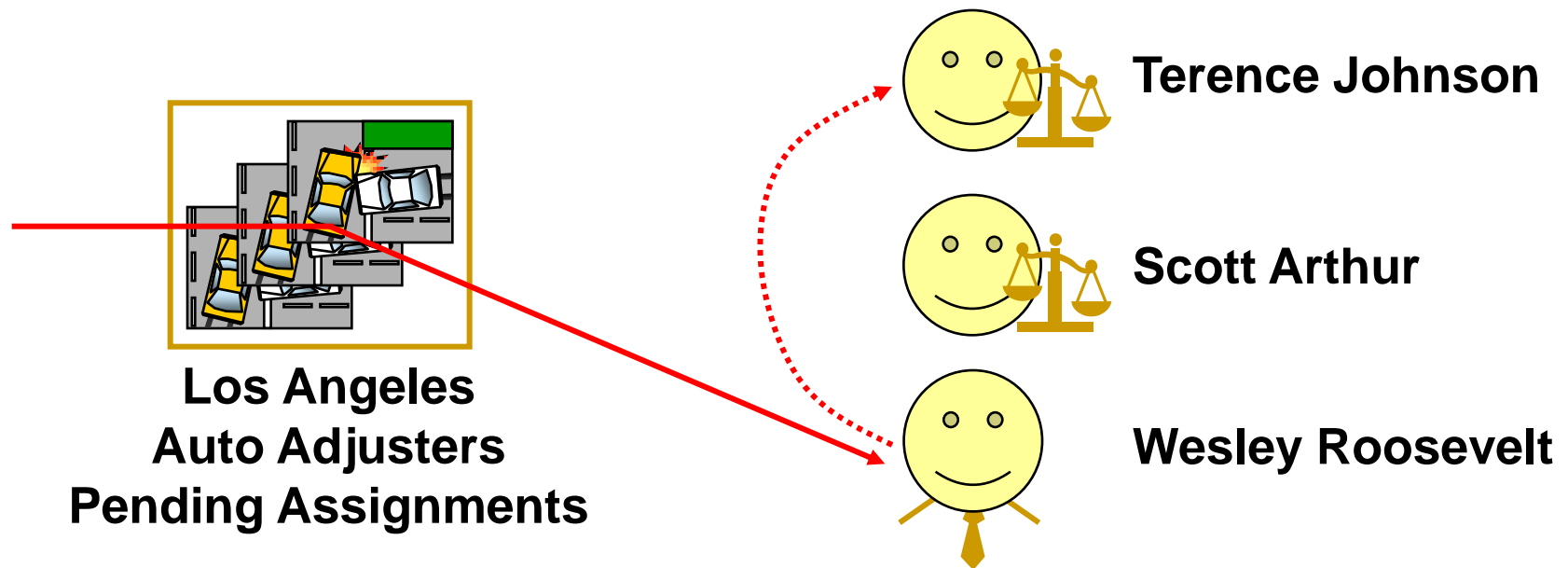
- ▶ Another user (typically a supervisor)



- ▶ The owner himself (when he/she takes ownership of an unassigned object)



"Pending Assignment" Claims

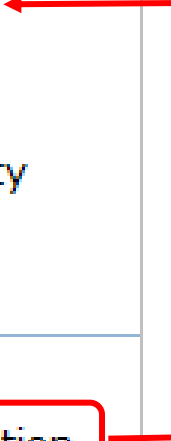


- ▶ A claim can be set to "pending assignment" status
 - It appears only on a special list visible only to the supervisor of the group
 - The supervisor is responsible for manually assigning it to a member of the group

Pending Assignment: Example

**if loss cause is riot and civil commotion
then set to pending assignment**

Loss Details	
Loss Details Associations Special Investigation Details	
<input type="button" value="Edit"/>	
General	
Loss Type	Auto
Line of Business	Auto
Primary Adjuster	Pending Assignment
Primary Group	LA Auto Adjusters
Catastrophe	
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Special Claim Permission	
Loss Details	
Loss Cause	Riot and civil commotion



The Pending Assignment List

The screenshot shows the Guidewire ClaimCenter interface in a Windows Internet Explorer browser. The address bar displays `http://localhost:8080/cc/ClaimCenter.do`. The application header includes the Guidewire logo, the text "Guidewire ClaimCenter", and links for "Unsaved Work", "Help", "About", and "Log Out". The main navigation bar contains tabs for "Desktop", "Search", "Team", "Address Book", "Claim", and "Vacation". A "Go to (Alt+)" search box is also present.

On the left side, there is a sidebar menu with the following items: "Activities (0)", "Claims (0)", "Exposures (0)", "Pending Assignment (1)", "Queues (0)", "Calendar", and "Bulk Invoices". The "Pending Assignment (1)" item is highlighted with a red rectangular box.

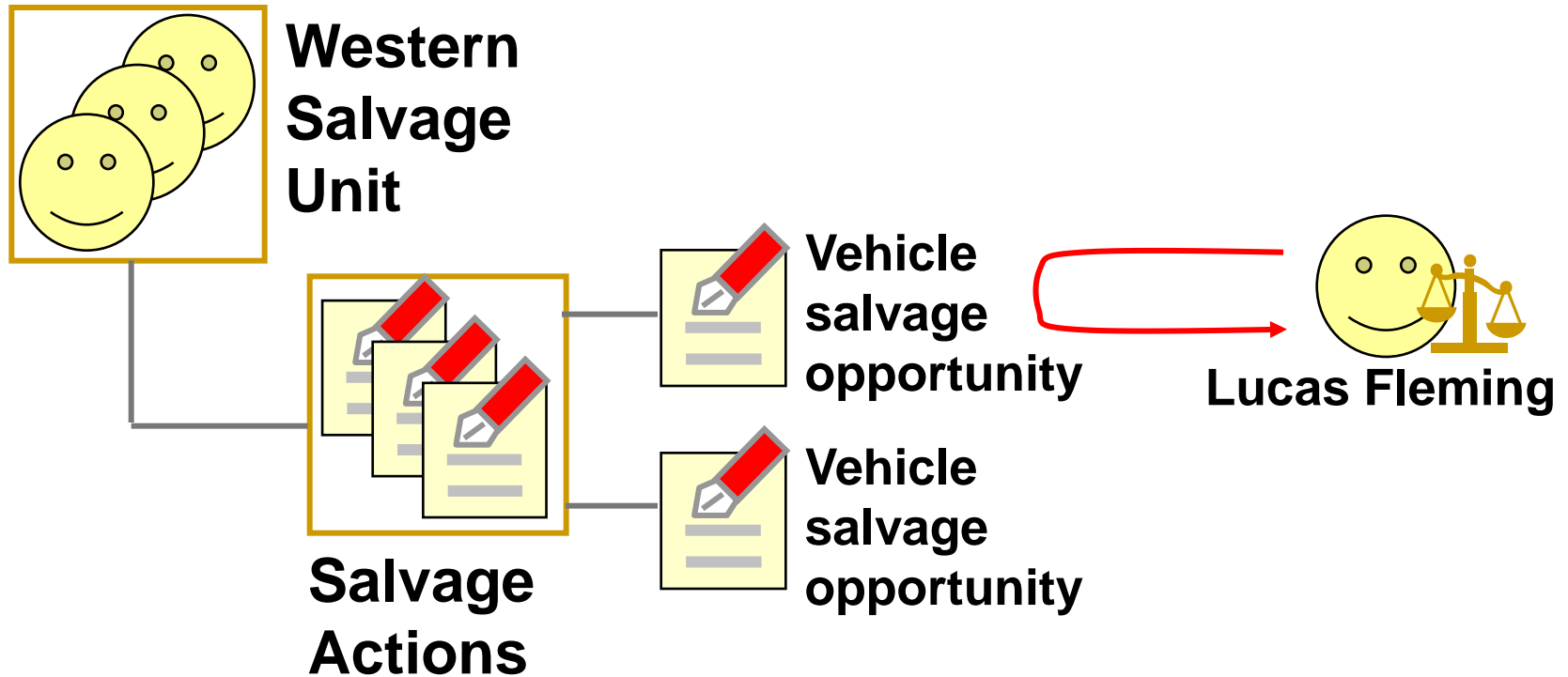
The main content area displays the "Pending Assignment (1 - 1 of 1)" section. It includes a dropdown menu set to "My pending assignments" and buttons for "Assign", "Reassign Activity", and "Print/Export". Below this is a table with the following data:

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

Below the table, there is another instance of the "My pending assignments" dropdown and "Assign", "Reassign Activity", and "Print/Export" buttons.

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

Activity Queues



- ▶ A queue is a repository associated to a group which contains activities that have been assigned to the group but not yet assigned to any user within that group
 - Users within the group can take ownership of activities in the queue

Queue Assignment: Example

if activity is a "Vehicle salvage opportunity" activity

then assign to Salvage queue for group to which claim is assigned

Activity Detail for Claim 000-00-000203			
<input type="button" value="Cancel"/> <input type="button" value="View Notes"/>			
Details		Activity Assignment	
Subject	Vehicle salvage opportunity	Assigned To	Salvage Actions - Western Salvage Unit
Description	Salvage Vehicle	Assigned Group	Western Salvage Unit
Related To	none (Claim-level)	Assigned By	Wesley Roosevelt
		Assign Date	05/14/2008

Activities in a Queue: Example

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

Actions

- Activities (0)
- Claims (0)
- Exposures (0)
- Queues (3)**
- Calendar
- Bulk Invoices

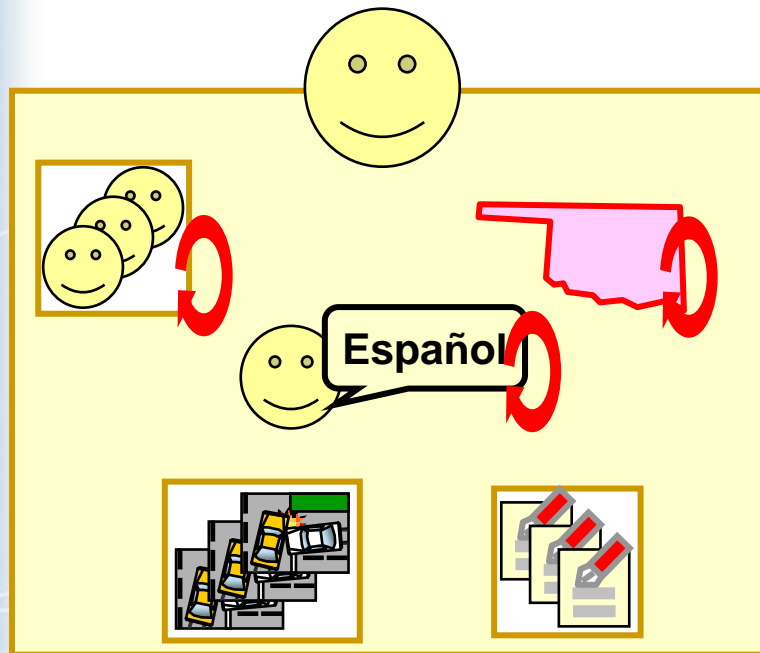
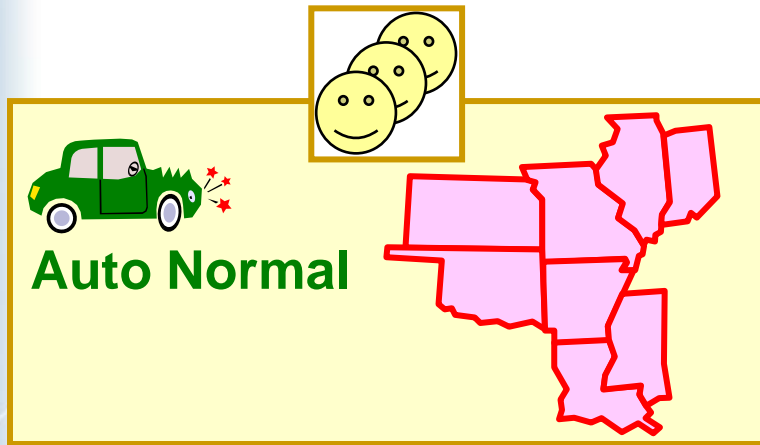
Queued Activities (1 - 3 of 3)

Salvage Actions - Western Salvage Unit (3) | Assign Next In Queue To Me | Refresh

			<u>Queued</u>	<u>Due</u>	<u>Priority</u>	<u>Subject</u>	<u>Claim</u> ▲	<u>Insured</u>
			05/14/2008	05/06/2008	Normal	Salvage Vehicle	000-00-000103	Robert Farley
			05/14/2008	05/06/2008	Normal	Vehicle salvage opportunity	000-00-000203	Allen Robertson
			05/14/2008	02/06/2008	Normal	Salvage Vehicle	235-53-373906	Larry Gamney

- ▶ From the Desktop, users can
 - view activity queues accessible to them
 - take ownership of the next activity in each queue

Assignment Summary



- ▶ Objects assigned to group first based on:
 - Group type, and/or
 - Group region
- ▶ Then, objects assigned to user within group based on:
 - Round robinning within a group, or
 - Round robin among users with given attribute(s), or
 - Round robin among users in a given region, or
 - Manual assignment of *claims* by a supervisor via pending assignment list, or
 - Manually taking ownership of *activities* by users via queue

Lesson Objectives

You should now be able to:

- Define the assignable objects
- Describe how assignment can be done at the group level
- Describe how assignment can be done at the user level (where the final owner is chosen by rules)
- Describe how assignment can be done at the user level (where the final owner is chosen by a user)

Review Questions

1. From a business standpoint, what determines whether a type of object is assignable or not?
2. When assignment is complete, what is an assignable object assigned to?
3. When an object is first created, is it assigned by rules or explicitly by the creator?
4. Identify if the following is a group-level approach to assignment, a user-level approach, or both:
 - a) Type (such as "Workers' Comp")
 - b) Region
 - c) Attribute (such as "Spanish speaker")
 - d) Assignment via activity queue

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