

Contacts

Lesson Objectives

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

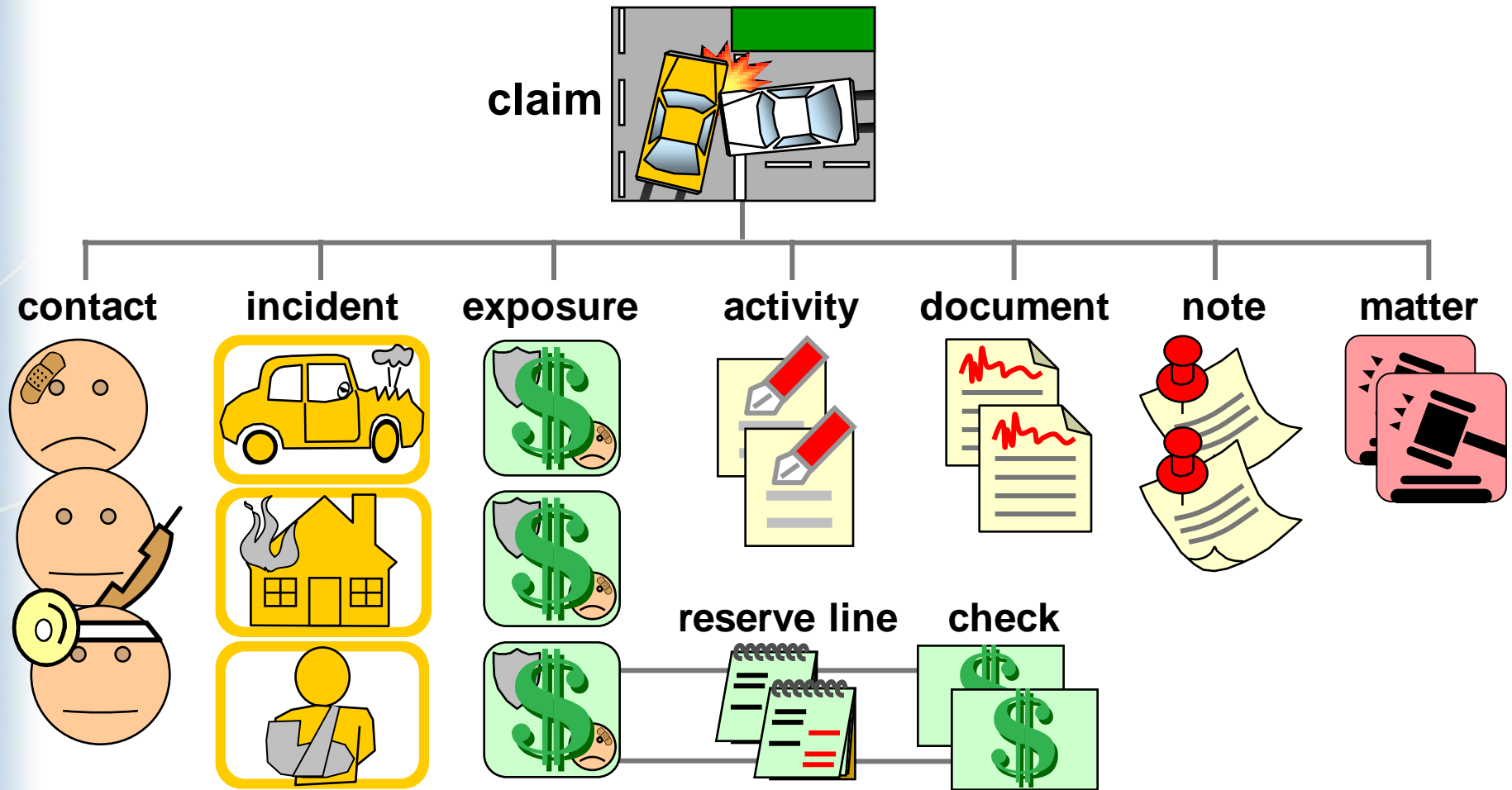
- Describe the functionality of contacts
- Describe the functionality of ContactCenter
- Create contacts in ClaimCenter
- Work with contacts in ClaimCenter
- Describe approaches to searching for contacts

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.”

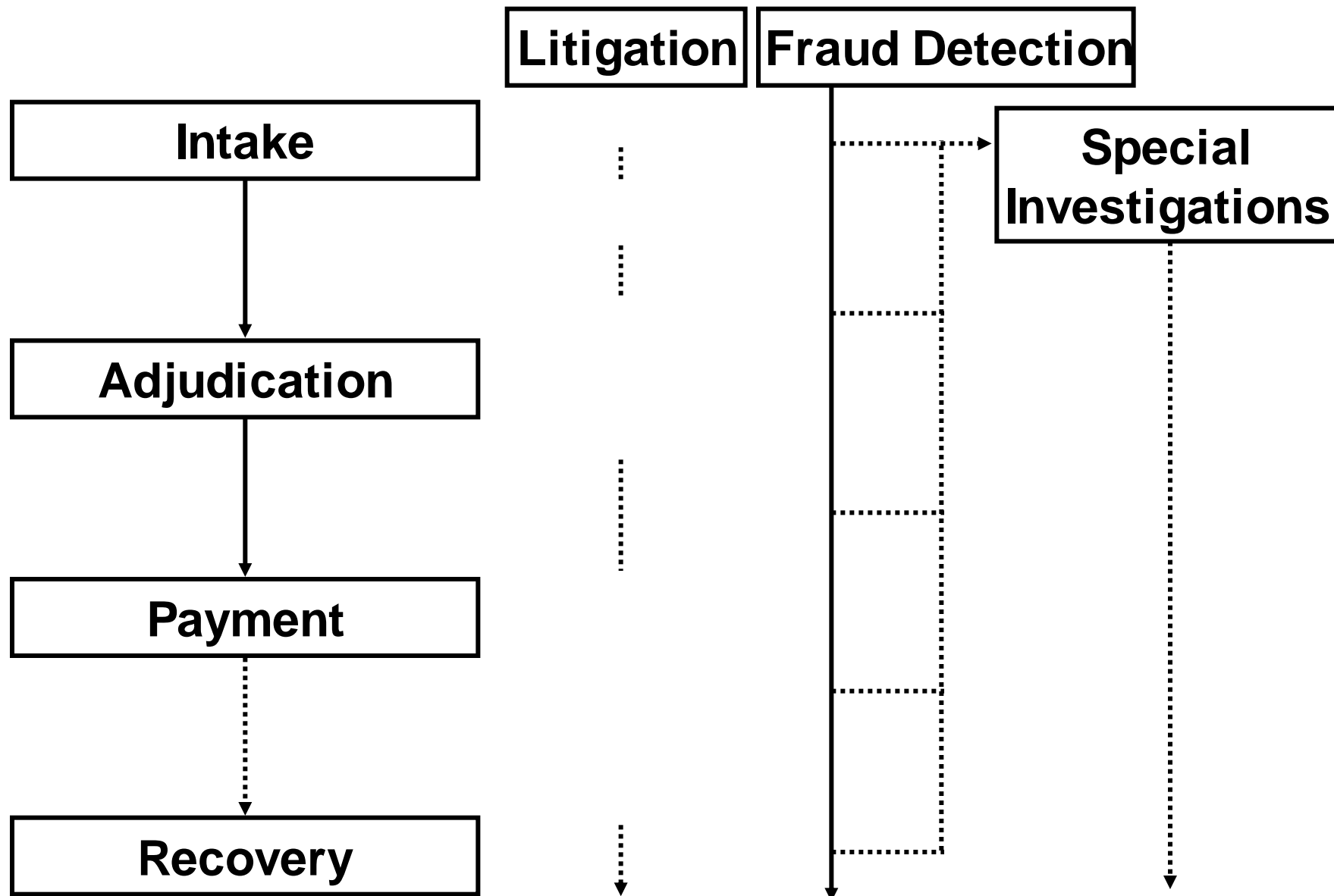
Lesson Outline

- ▶ **Contact Basics**
- ▶ ContactCenter
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

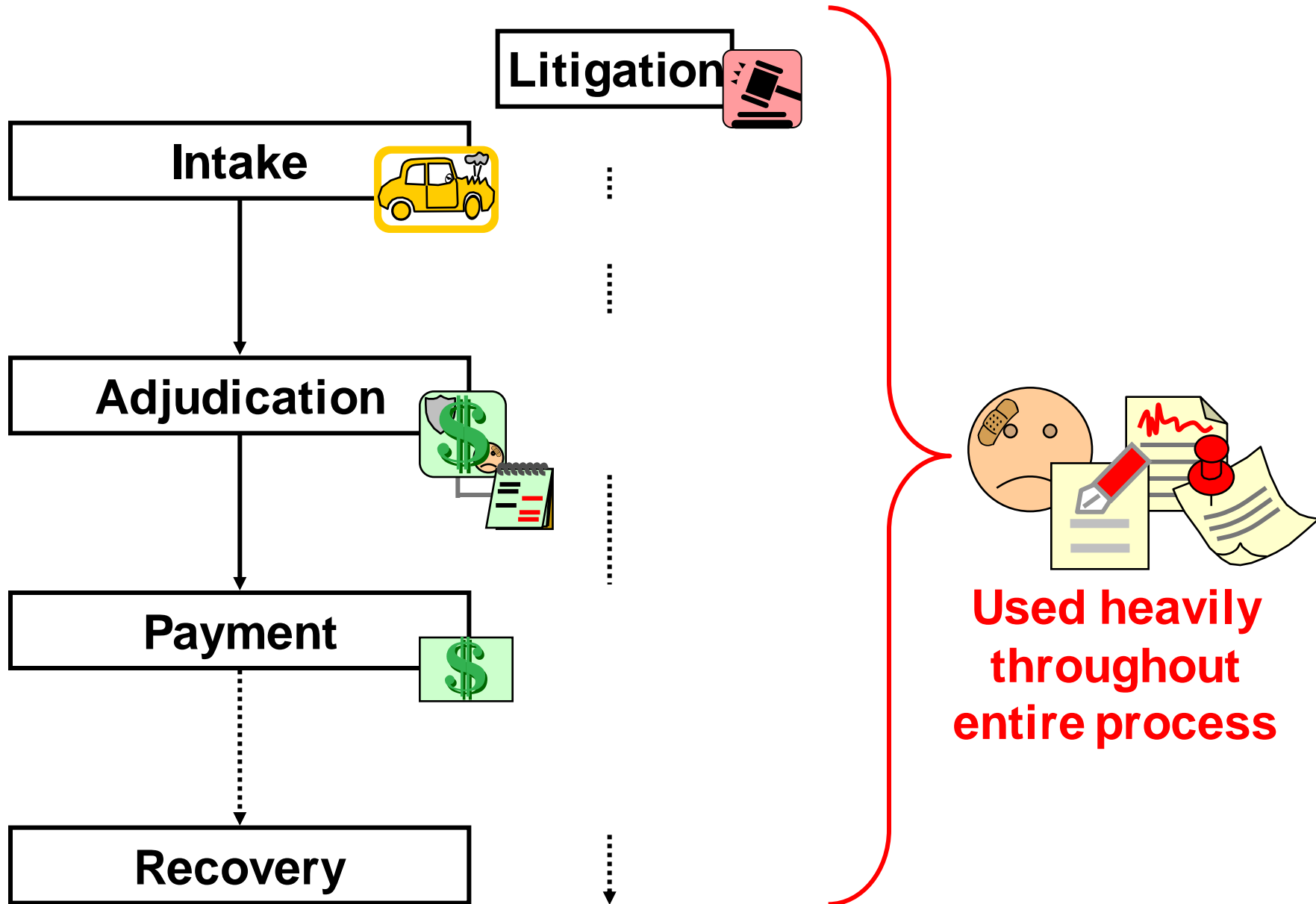
Review: Entities in the Claim File



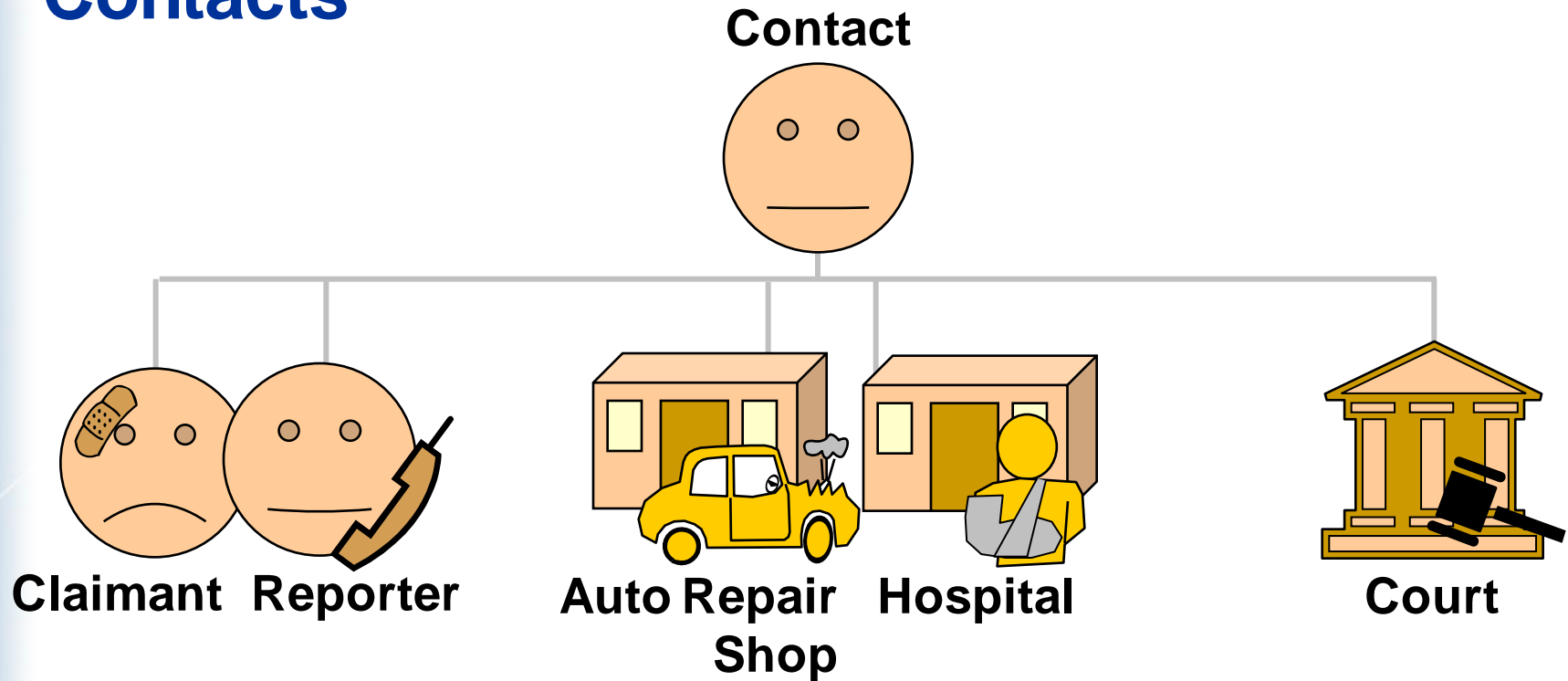
Review: The Claims Process



Mapping Entities to the Claims Process

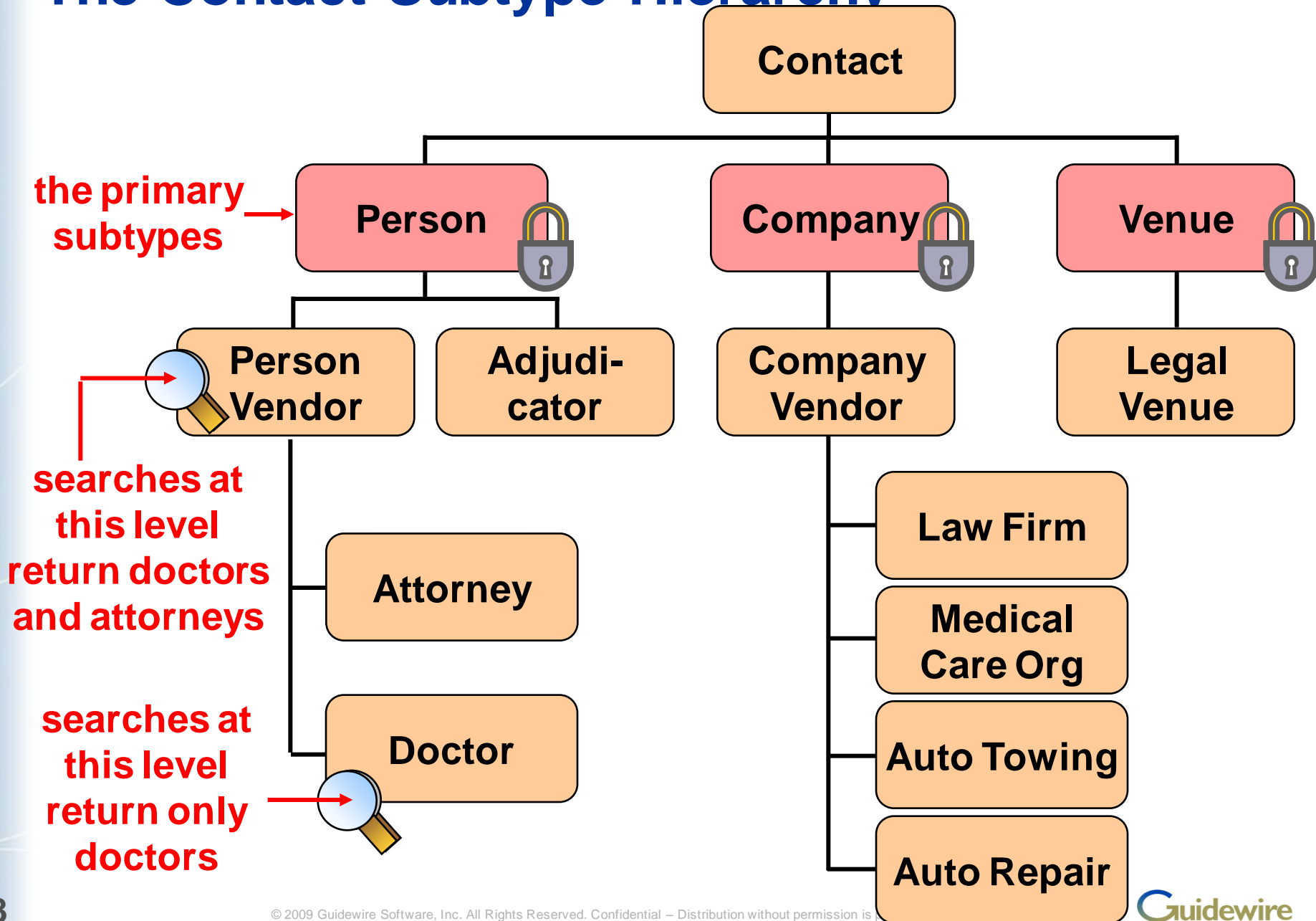


Contacts

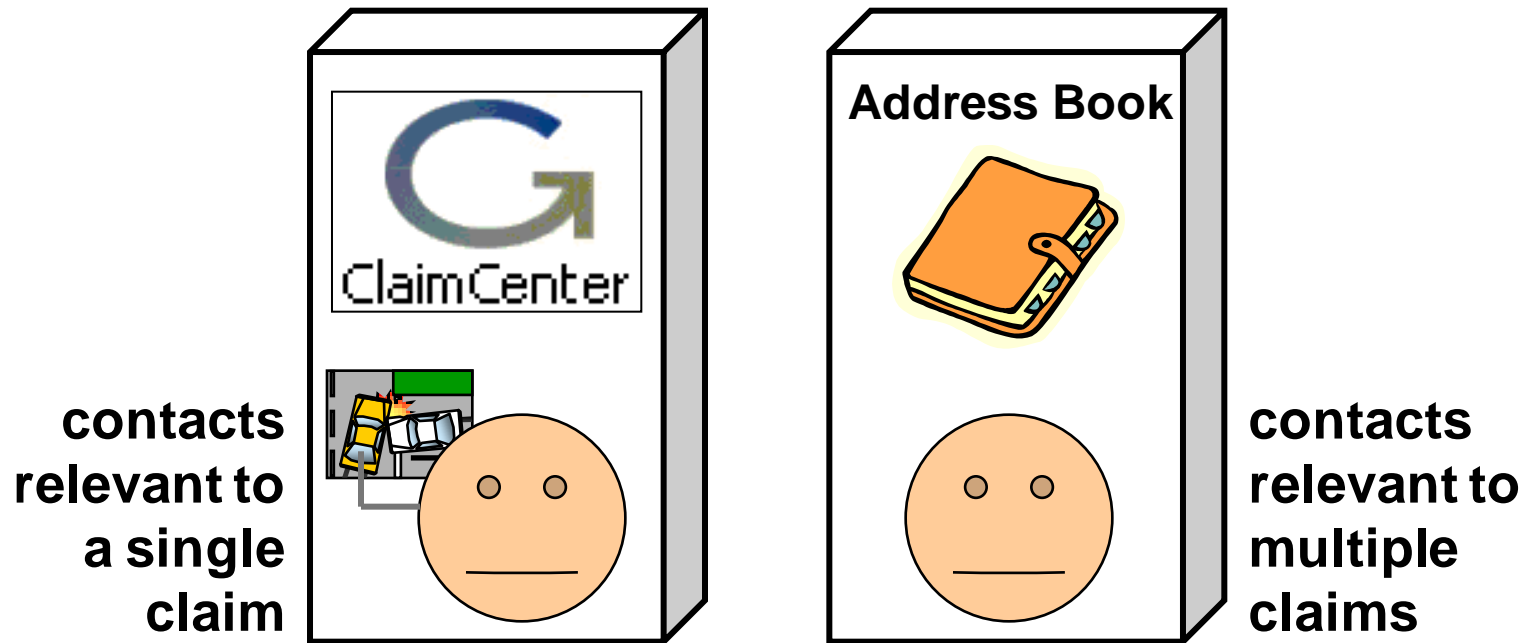


- ▶ A contact is a person, organization, or venue which is related to the claim, such as...
 - Someone who suffered a loss
 - Some company which repaired a damaged asset
 - Some place where disputes were resolved

The Contact Subtype Hierarchy



Two Applications Store Contacts

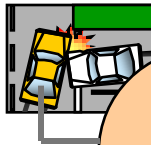


- ▶ Two applications store contacts
 - ClaimCenter stores contact information as it pertains to a given claim
 - Address Book stores contacts that are (potentially) relevant to multiple claims

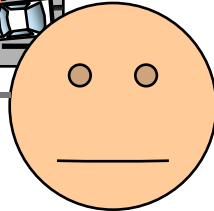
"Single Use" Contacts



Claim
000-00-002006



Doris Schwartz
(witness)

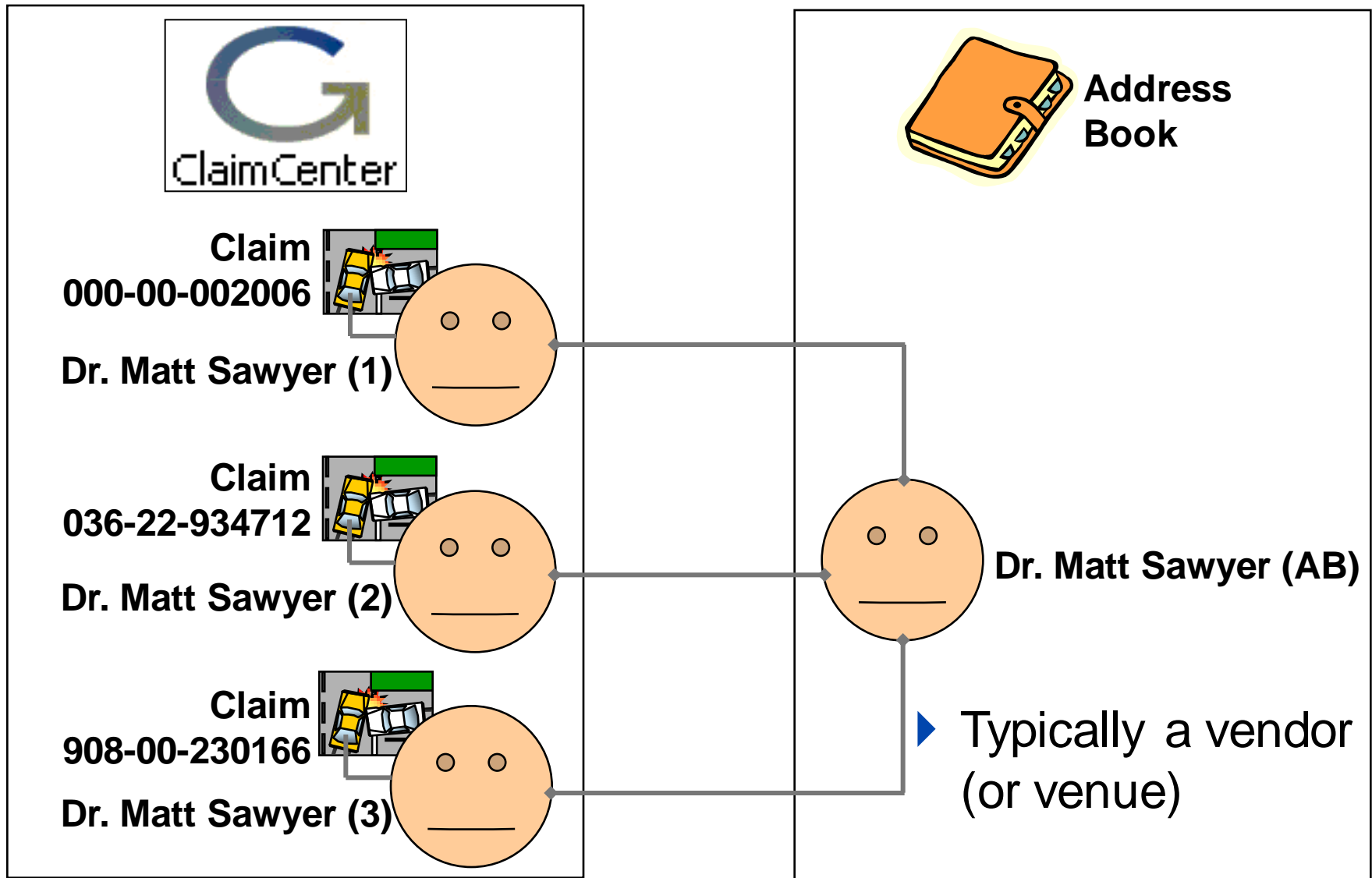


- ▶ Typically a non-vendor, non-venue contact, such as the insured, a claimant, or a witness

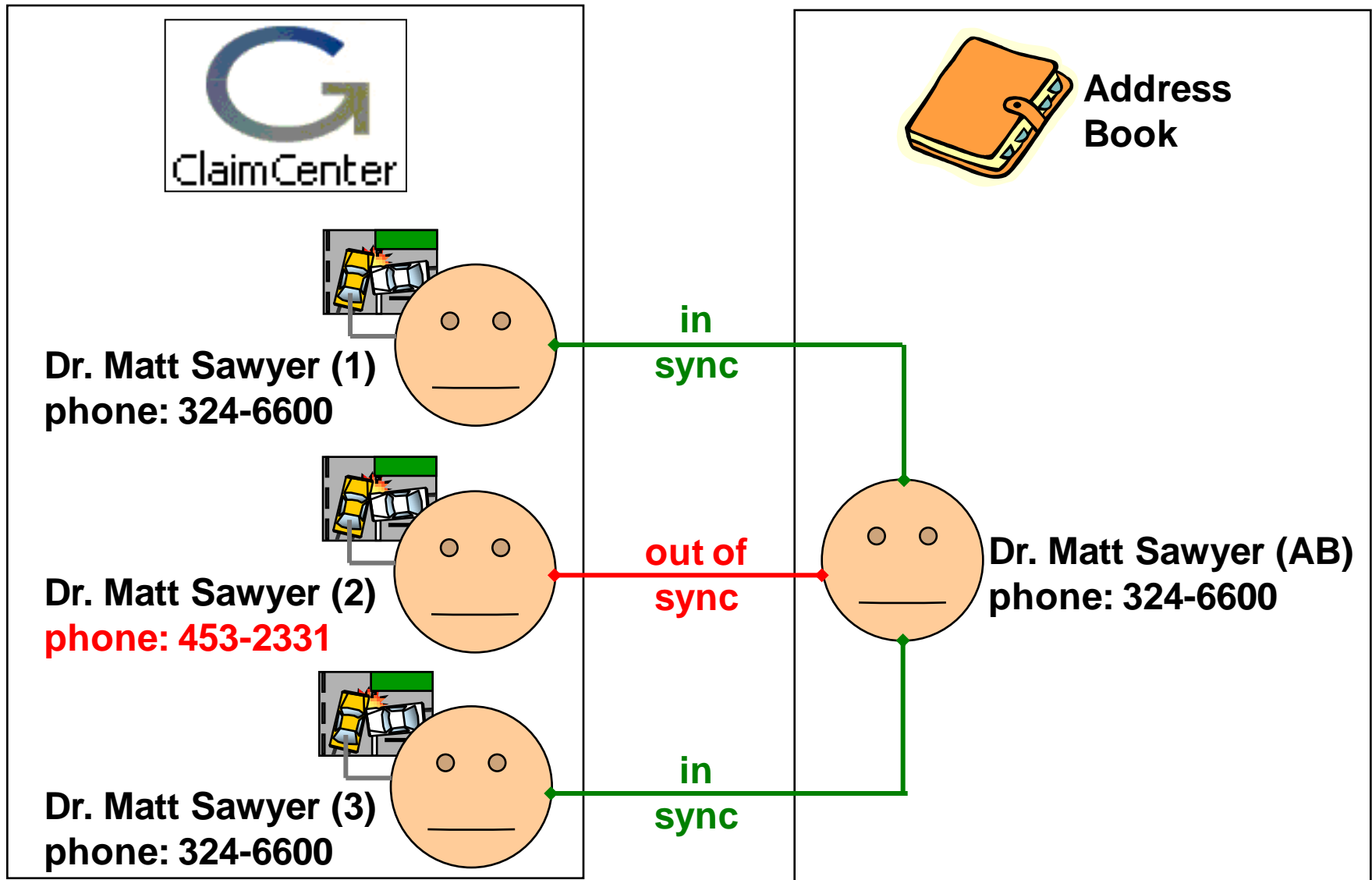


**Address
Book**

"Multi-Use" Contacts



Multi-Use Contacts Are Typically "Linked"



Types of Users That Work With Contacts

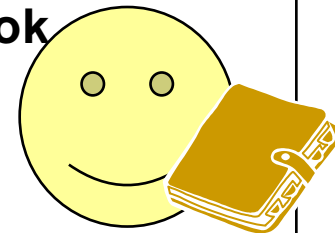


Adjusters...

- ▶ Work in ClaimCenter
- ▶ Create "single-use" contacts
- ▶ Create "multi-use" contacts from AB contacts
- ▶ Sync information from AB to ClaimCenter



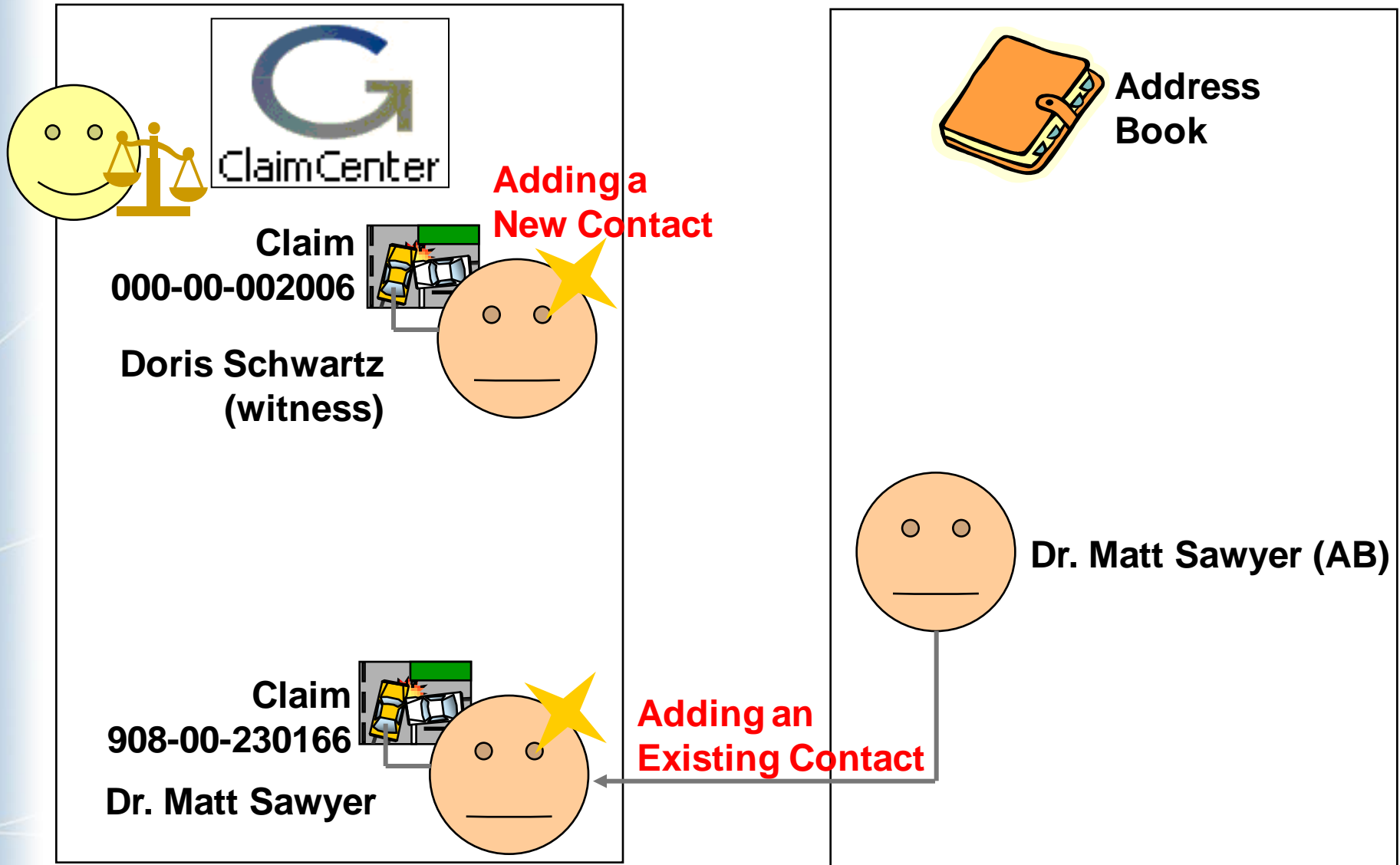
Address
Book



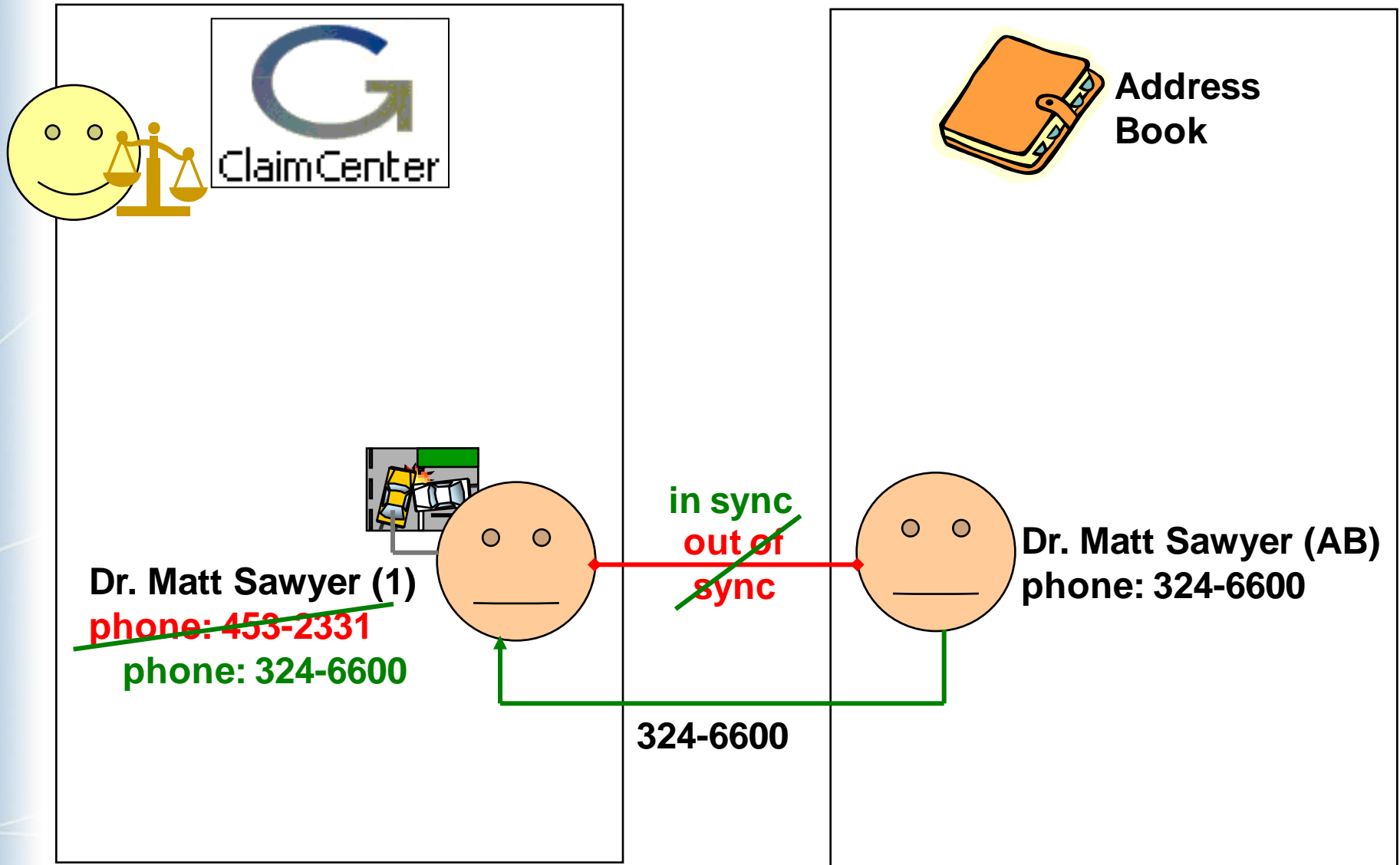
Vendor managers...

- ▶ Work in Address Book
- ▶ Create and edit reusable address book contacts

Adding a Contact within ClaimCenter



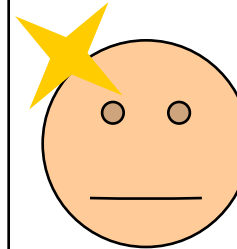
Syncing Contacts



Adding a Contact within Address Book



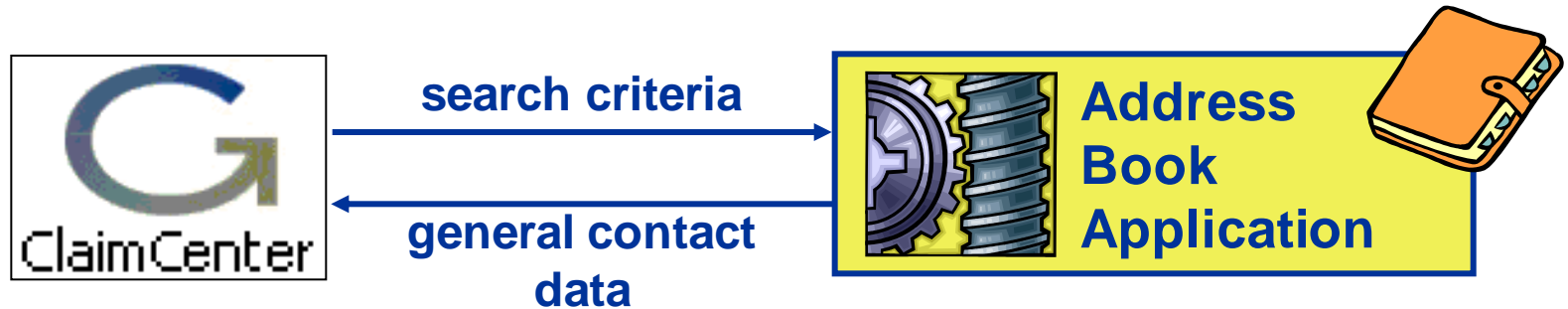
**Address
Book**



Adding a Contact

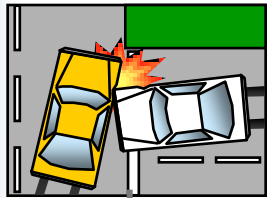
**Quake City
Explosives Inc. (AB)**

Address Book Integration

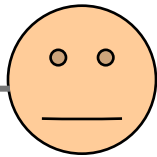


- ▶ Every instance of ClaimCenter has an integration point to an address book application
 - Nearly every implementation uses Guidewire ContactCenter as the address book application

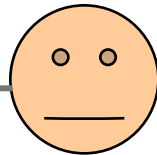
Contact Roles



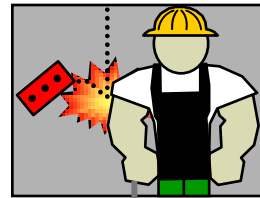
Auto Claim
036-22-934712



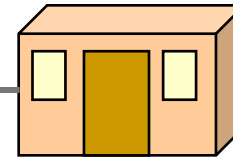
Ellen Lopez
- Insured (policy)
- Reporter (entire claim)
- Claimant (exposure 1)



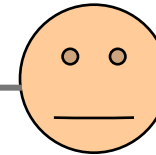
Matt Sawyer
- Doctor (entire claim)



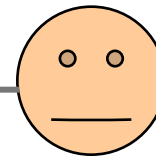
Workers' Com Claim
772-12-9000



OmniTech Inc.
- Insured (policy)



Tommy Duke
- Claimant (exposure 1)

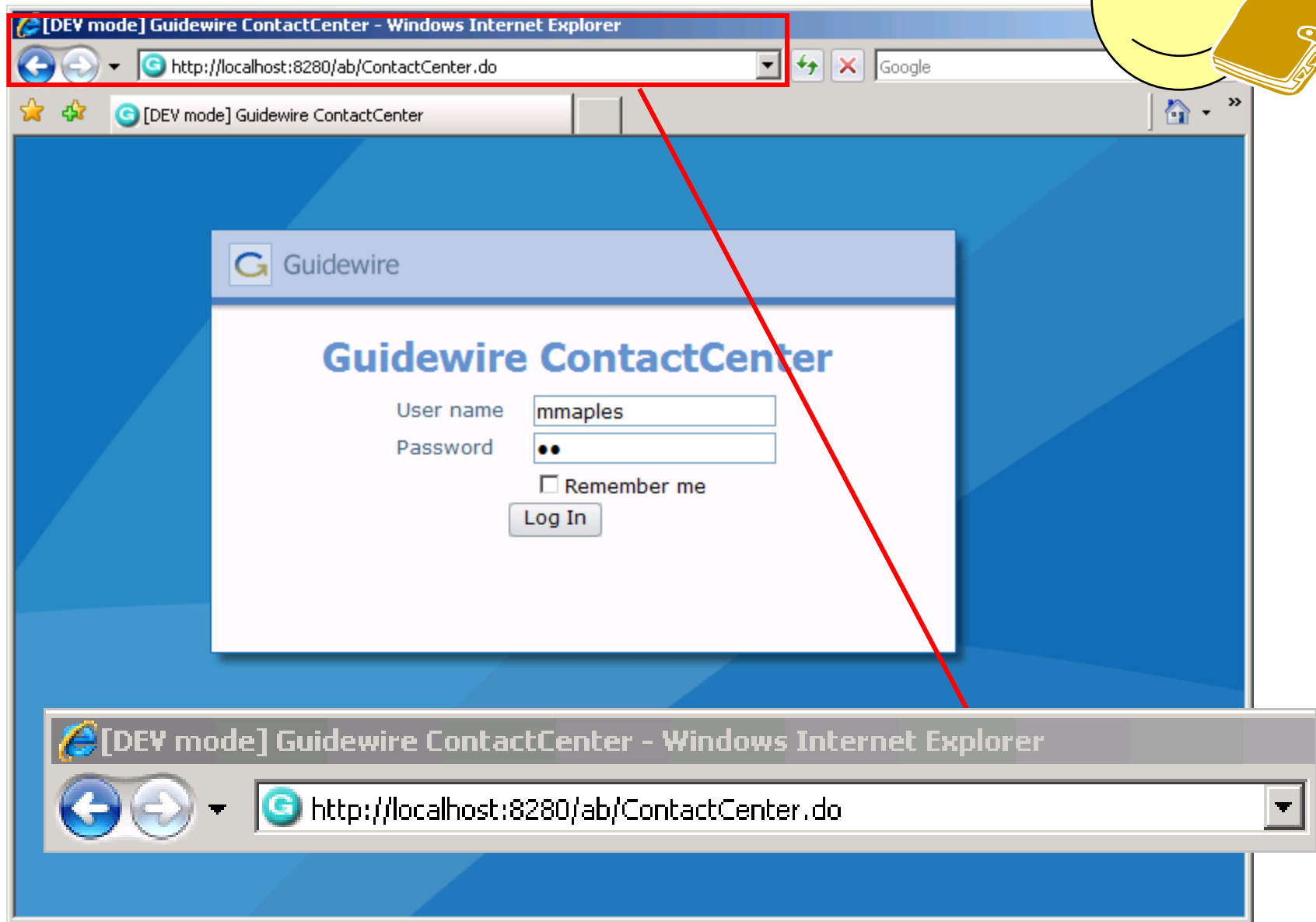
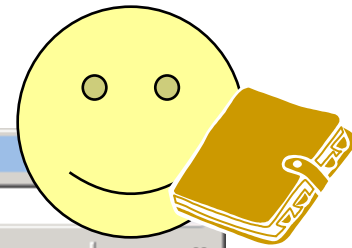


Matt Sawyer
- Doctor (entire claim)

Lesson Outline

- ▶ Contact Basics
- ▶ **ContactCenter**
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

Accessing ContactCenter



The ContactCenter Interface

Contacts ▾

Administration

Actions ▸

Search

Contact Type * Person ▾

First Name

Last Name

Tax ID

Organization Name

Minimum Score <none selected> ▾

Location

City

State <none>

ZIP Code-

Country <none>

Search

Reset

Search Results (empty)

Delete

	Name	Address	City	State	ZIP	Phone #	Contact Ty
--	------	---------	------	-------	-----	---------	------------

Creating New Contacts in ContactCenter

The screenshot displays the 'Administration' tab in the ContactCenter interface. On the left, the 'Actions' menu is open, showing 'New Person', 'New Company', and 'New Place'. The 'New Person' option is selected, opening a sub-menu with 'Adjudicator', 'User Contact', 'Policy Person', 'Vendor', and 'Other'. The 'Vendor' option is further expanded, showing 'Attorney', 'Doctor', and 'Other'. The 'Doctor' option is highlighted. The main form area shows the 'ABDoctor' contact details. The 'First name' field contains 'Matt', 'Middle name' is empty, 'Last name' contains 'Sawyer' (marked with a red asterisk), 'Prefix' and 'Suffix' are set to '<none selected>'. Below this is the 'Primary Address' section with fields for 'Address Line 1', 'Address Line 2', and 'City'. A small icon is visible next to the 'City' field.

Contacts | **Administration**

Actions

Search

New Person

- Adjudicator
- User Contact
- Policy Person
- Vendor
 - Attorney
 - Doctor
 - Other
- Other

ABDoctor

First name: Matt

Middle name:

Last name: * Sawyer

Prefix: <none selected>

Suffix: <none selected>

Primary Address

Address Line 1:

Address Line 2:

City:

Lesson Outline

- ▶ Contact Basics
- ▶ ContactCenter
- ▶ **Creating ClaimCenter Contacts**
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

Creating Contacts from the New Claim Wizard

Step 2 of 5: Basic information

Cancel | < Back | Next >

Reported By

How Reported: Phone

Name: ★ Brittany Turner

Relation to Insured ★: Self

Date of Notice: 05/15/2008

Verify Date of Birth

Date of Birth:

Confirm Contact Info

Address: 2563 West Ave., Orange, CA 91357

Business Phone: 213-457-6378 x....

Home Phone: x....

Mobile: x....

Primary Phone: Business

Email:

Edit Contact

Insured

Name: [Brittany Turner](#)

Address: 2563 West Ave., Orange, CA 91357

Primary Phone: 213-457-6378

Main Contact

Same Person? ☐ Same as reporter ☒ Different person

Name: <none selected>

Relation to Insured: <none selected>

New Person

Search

Contacts added on the Main Contacts step have a pre-defined role

Actions

New Claim Wizard

- [Find Policy](#)
- [Basic Info](#)
- Loss Details
- Services
- Save & Assign Claim
- Parties Involved**

Parties Involved

< Back

Add any additional parties involved

All New Contact

<input type="checkbox"/>	Name^	Roles
<input type="checkbox"/>	Karen Egertson	Agent
<input type="checkbox"/>	Scott Shiu	Covered Pa
<input type="checkbox"/>	Brittany Turner	Insured, Re

Contacts added on the Parties involved step can have any role

Adding a New "Single Use" Contact

The screenshot illustrates the process of adding a new "Single Use" contact in the Guidewire system. The interface is divided into two main sections: a contact list on the left and a detailed form on the right.

Contact List (Left):

	Name	Roles
<input type="checkbox"/>	Karen Egertson	Agent
<input type="checkbox"/>	Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver
<input type="checkbox"/>	Helen Nixon	Witness

New Contact Form (Right):

The form is titled "New Person (Return to Contacts)" and includes tabs for "Basics", "Addresses", and "Related Contacts". The "Basics" tab is active.

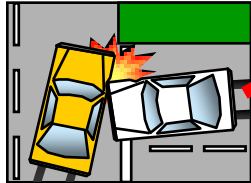
Form Fields:

- Update:** A button to save the contact.
- Cancel:** A button to cancel the operation.
- Roles:** A section with an "Add" button and a "Remove" button.
- Related To:** A dropdown menu showing "235-53-373872" and a role of "Witness".
- Person Information:**
 - First name: Helen
 - Middle name: (empty)
 - Last name: *Nixon
- Additional Info:**
 - Tax ID (SSN)
 - Tax Filing Status
 - Date of Birth

Red arrows and boxes highlight the steps: clicking "New Contact", selecting "Person", clicking "Update", and the resulting contact entry in the table.

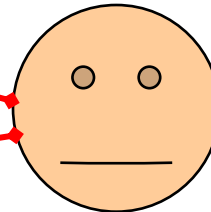
Roles

Claim
235-53-373872



Incident
2000 Fiat

witness



**Helen
Nixon**

passenger

Roles

<input type="checkbox"/> Related To	*Role
<input type="checkbox"/> 235-53-373872 (entire claim)	Witness
<input type="checkbox"/> 2000 Fiat Cinquecento (7FDG745 / Califor	Passenger

Adding an Existing "Multi-Use" Contact

The screenshot illustrates the process of adding an existing contact to a new auto repair shop in the Guidewire system. The interface is divided into several panels:

- Contacts Panel (Top Left):** Displays a list of contacts. The "Add Existing Contact..." button is highlighted with a red box and an arrow pointing to the "Search Address Book" panel.
- Search Address Book Panel (Top Right):** Shows the search results for the address book. The "Type" is set to "Auto Repair Shop", and the "Name" is "European". The "Search Results (1 - 1 of 1)" section shows a single result: "European Autoworks" at "9721 Whistler Dr". The "Select" button is highlighted with a red box and an arrow pointing to the "Update" button in the "New Auto Repair Shop" panel.
- New Auto Repair Shop Panel (Bottom Left):** Shows the form for creating a new auto repair shop. The "Update" button is highlighted with a red box and an arrow pointing to the "Select" button in the "Search Address Book" panel. The "Primary Address" field is filled with "9721 Whistler Dr".
- Contacts Panel (Bottom Right):** Displays the updated list of contacts. The "European Autoworks" contact is now listed with the role "Repair Shop".

Red arrows indicate the flow of the process: from the "Add Existing Contact..." button to the "Search Address Book" panel, then to the "Select" button, and finally to the "Update" button in the "New Auto Repair Shop" panel.

Name	Roles	Contact Prohibited?
Karen Egertson	Agent	No
Lisa Shiu	Insured, Claimant,	No
European Autoworks	Repair Shop	No

Lesson Outline

- ▶ Contact Basics
- ▶ ContactCenter
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

Review: Viewing Contacts

Actions ▶

Summary

Workplan

Loss Details

Exposures

Parties Involved

Policy

Financials

Notes

Contacts
Contacts | [Users](#)

All ▼

New Contact ▼

<input type="checkbox"/>		Name	Roles
<input checked="" type="checkbox"/>	▶	European Autoworks	Repair Shop
<input type="checkbox"/>	▶	Karen Egertson	Agent
<input type="checkbox"/>	▶	Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver
<input type="checkbox"/>	▶	Helen Nixon	Passenger, Witness

Identifying If a Contact Is Linked

Contacts
Contacts | Users

All ▼ New Contact

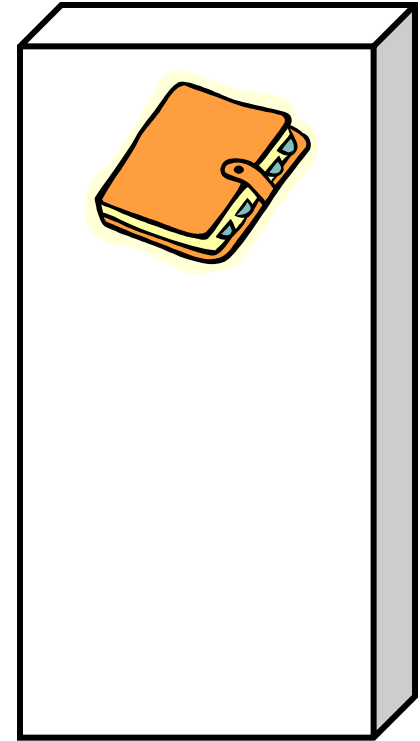
<input type="checkbox"/>	Name^	Roles
<input checked="" type="checkbox"/>	Karen Egertson	Agent
<input type="checkbox"/>	European Autoworks	Repair Shop
<input type="checkbox"/>	Helen Nixon	Passenger, Witness
<input type="checkbox"/>	Lisa Shiu	Insured, Claimant, Contact, Reporter, Driver

Basics | Addresses | Related Contacts

Edit | Link

This contact is not linked to the Address Book

Roles	Related To
	54-586897



Editing an Unlinked Contact

Basics [Addresses](#) [Related Contacts](#)

Edit **Link**

This contact is not linked to the Address Book

Roles

Related To
54-586897

Person

First name Karen

Middle name

Last name Egertson

Prefix

Suffix

Former name

Phone

Business 213-457-6378

Basics [Addresses](#) [Related Co](#)

Update **Cancel**

This contact is not linked to

Roles

Add **Remove**

☐ **Related To**

☐ 54-586897

Person

First name Karen

Middle name

Last name ★ Egertson

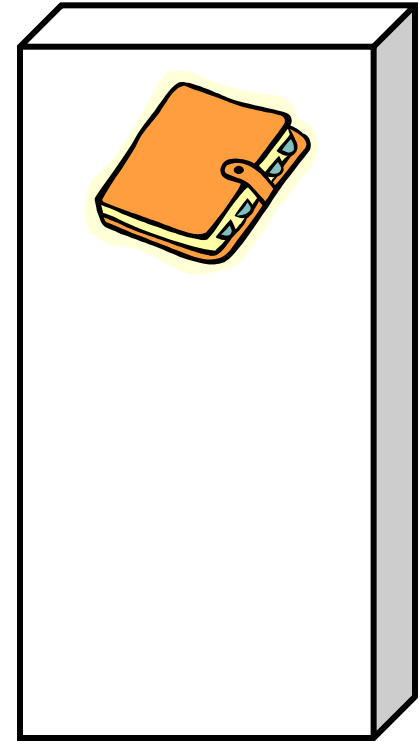
Prefix <none selected>

Suffix <none selected>

Former name

Phone

Business 213-453-2331 x....



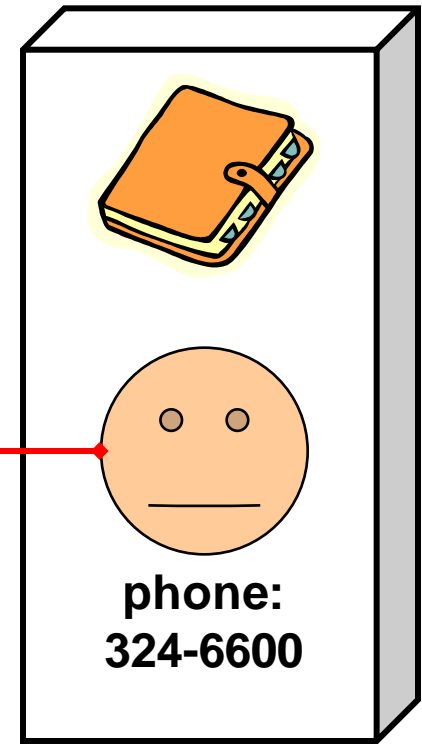
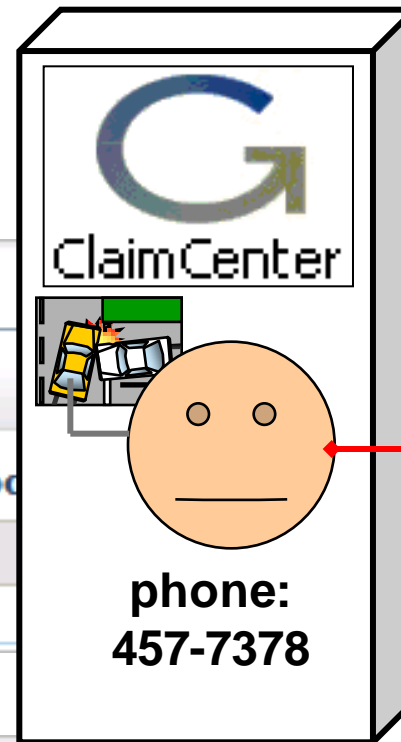
Linking an Unlinked Contact

Basics Addresses Related Contacts

Edit **Link**

This contact is not linked to the Address Book

Roles	Related To
	54-586897



Basics Addresses Related Contacts

Edit **Unlink** Copy from Address Book View in Address Book

This contact is linked to the Address Book but is out of sync

Roles	Related To	Role
	54-586897	Agent

Identifying If a Contact Is Linked (In Sync)

Contacts
Contacts | Users

All [v] New Contact [v] Add Exist

<input type="checkbox"/>	Name△	Roles	Contact Prohibited
<input checked="" type="checkbox"/>	Karen Egertson	Agent	No
<input type="checkbox"/>	European Autoworks	Repair Shop	No
<input type="checkbox"/>	Helen Nixon	Passenger, Witness	No
<input type="checkbox"/>	Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver	No

Basics | Addresses | Related Contacts

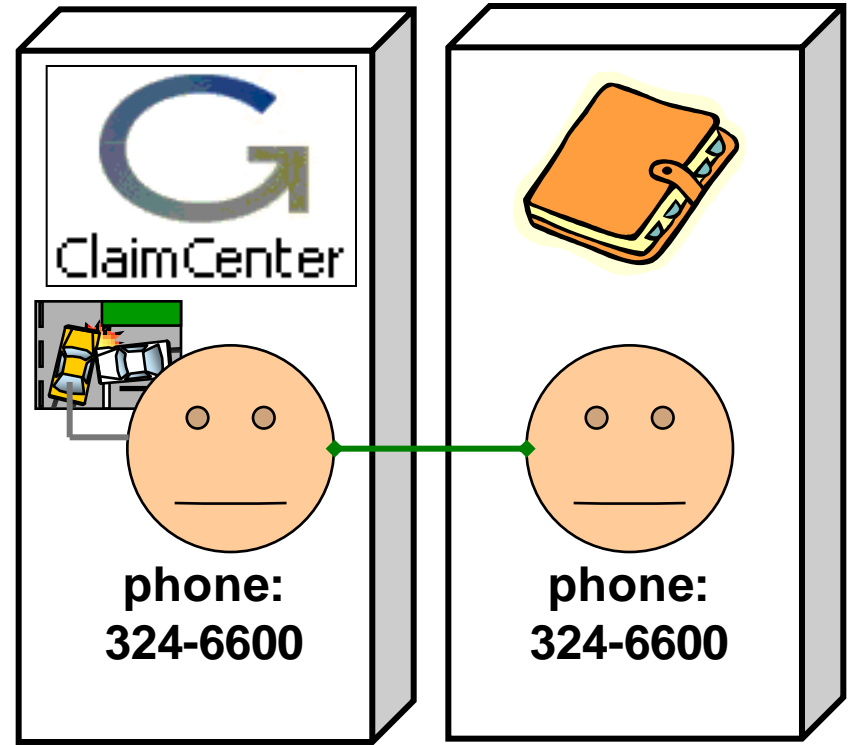
Edit | Unlink | View in Address Book

This contact is linked to the Address Book and is in sync

Roles	Related To
	54-586897

Person		Additio	
First name	Karen	Tax ID (
Middle name		Tax Filing	
Last name	Egertson	Date of	
Prefix		Gender	
Suffix		Marital s	
Former name		Guardian	

Phone		Compa	
Business	213-324-6600	Occupat	



Identifying a Linked Contact (Out of Sync)

Contacts
Contacts | Users

All ▼ New Contact

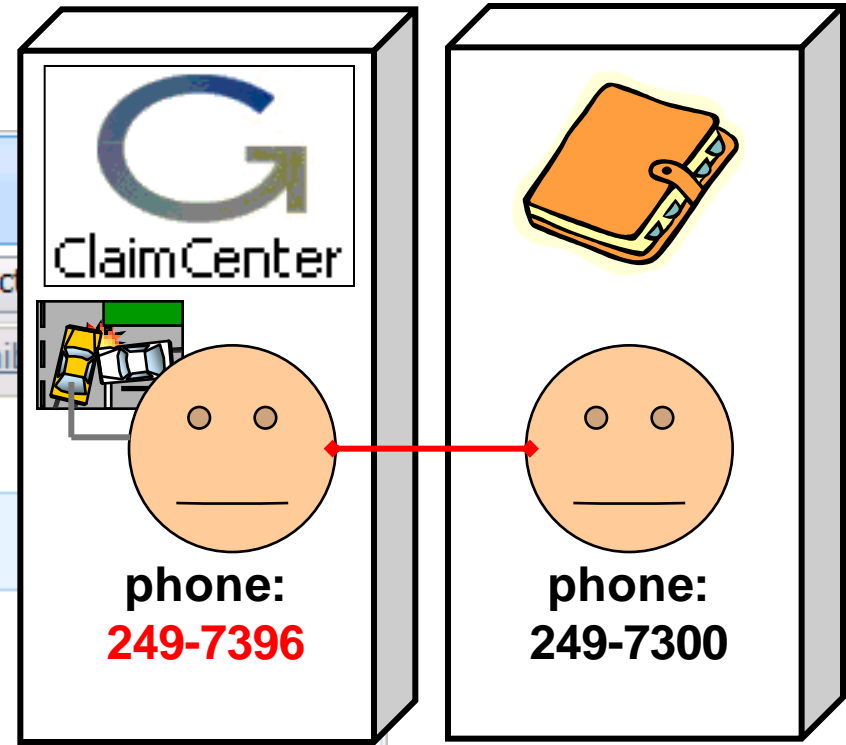
<input type="checkbox"/>	Name	Roles	Contact Profile
<input type="checkbox"/>	▶ Helen Nixon	Passenger, Witness	No
<input type="checkbox"/>	▶ Karen Egertson	Agent	No
<input type="checkbox"/>	▶ Lisa Shiu	Insured, Claimant, Main Contact, Reporter, Driver	No
<input type="checkbox"/>	▶ European Autoworks	Repair Shop	No

514-249-7396

Basics | [Addresses](#) | [Related Contacts](#) | [Reviews](#)

[Edit](#) | [Unlink](#) | [Copy from Address Book](#) | [View in Address Book](#)

This contact is linked to the Address Book but is out of sync



Viewing Each Contact

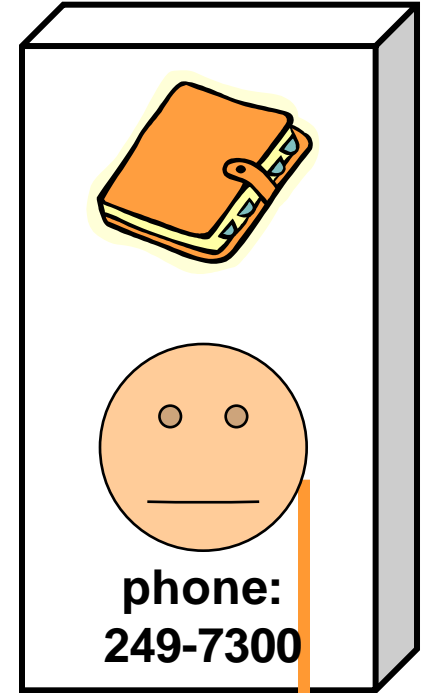
<input type="checkbox"/>	<input checked="" type="checkbox"/> European Autoworks	Repair Shop	No	514-249-7396
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[Basics](#)
[Addresses](#)
[Related Contacts](#)
[Reviews](#)

[Edit](#)
[Unlink](#)
[Copy from Address Book](#)
[View in Address Book](#)

This contact is linked to the Address Book but is out of sync

Roles	Related To	Role
	235-53-373872	Repair



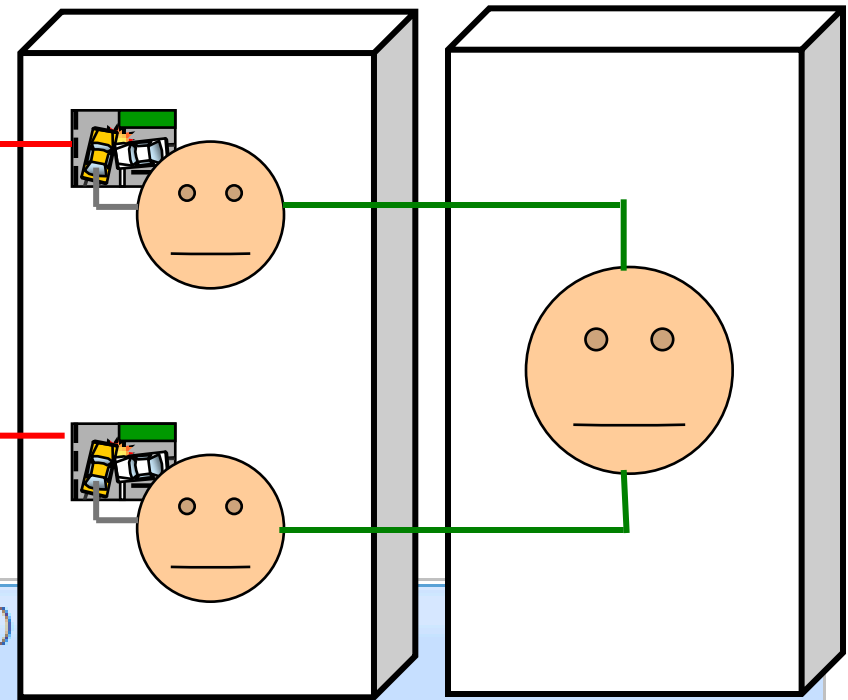
European Autoworks
[Return to Contacts](#)

[Basics](#)
[Addresses](#)
[Related Contacts](#)
[Activities](#)
[Claims](#)
[Exposures](#)
[Matters](#)
[Review](#)

[Print](#)
[Edit](#)
[Check for Duplicates](#)

Auto Repair Shop Name European Autoworks		Additional Info Preferred Vendor? No Business License	
Primary Address Address Line 1 9721 Whistler Dr Address Line 2 City San Francisco		Contact Info Primary Contact Business 514-249-7300	

Viewing Objects Related to an AB Contact



European Autoworks (Return to Contacts)					
Contacts Users					
Basics Addresses Related Contacts Activities Claims Exposures Matters Re					
All open ▼ Print					
Claim ▲	Policy	Insured	Claimant		Loss Date
235-53-373870	53-263535	Mark Henderson	Alecia Cole, Bill Henderson, Richard Jackson		01/26/2008
235-53-373872	54-586897	Lisa Shiu	Lisa Shiu		01/04/2008

Editing the ClaimCenter Contact

<input type="checkbox"/>	European Autoworks	Repair Shop	No	514-249-7300
--------------------------	--------------------	-------------	----	--------------

Basics | Addresses | Related Contacts | Reviews

Edit | Unlink | View in Address Book

This contact is linked to the Address Book and is in sync

Roles	Related To	Role
	235-53-373872	Repa

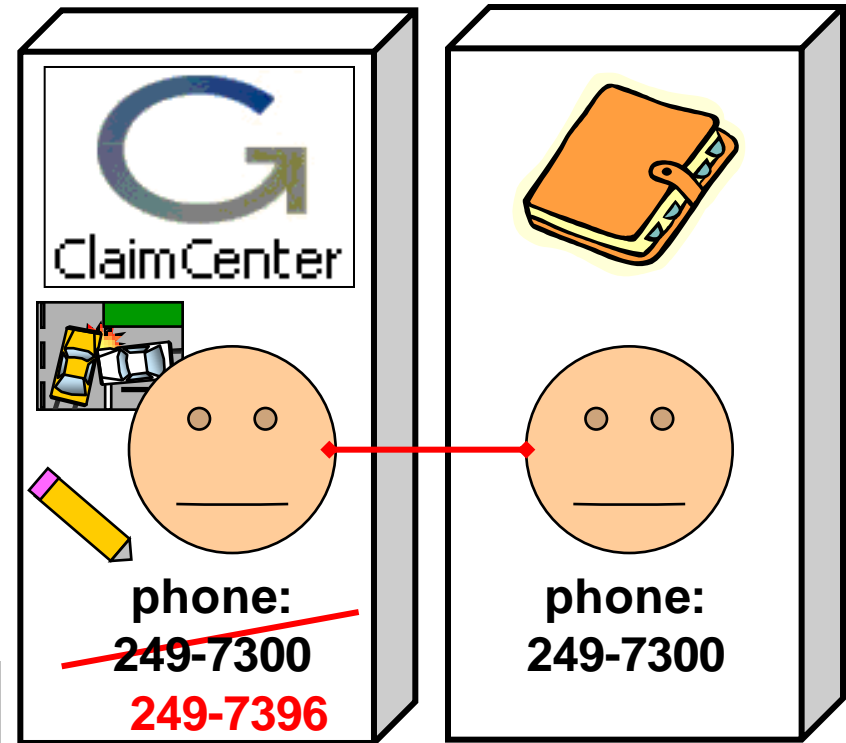
<input type="checkbox"/>	European Autoworks	Repair Shop	No	514-249-7396
--------------------------	--------------------	-------------	----	--------------

Basics | Addresses | Related Contacts | Reviews

Edit | Unlink | Copy from Address Book | View in Address Book

This contact is linked to the Address Book but is out of sync

Roles	Related To	Role
	235-53-373872	Repa



Editing the Address Book Contact

Basics | Addresses | Related Contacts | Reviews

Edit | Unlink | **View in Address Book**

This contact is linked to the Address Book and is in sync

Roles

Related To
235-53-373872

Auto Repair Shop

Name European Autoworks

Primary Address

European Autoworks (Return to Contacts)

Contacts | Users

Basics | Addresses | Related Contacts | Activities

Print | Edit | Check for Duplicates

Auto Repair Shop

Name European Autoworks

Primary Address

Basics | Addresses | Related Contacts | Reviews

Edit | Unlink | Copy from Address Book | View in Address Book

This contact is linked to the Address Book but is out of sync

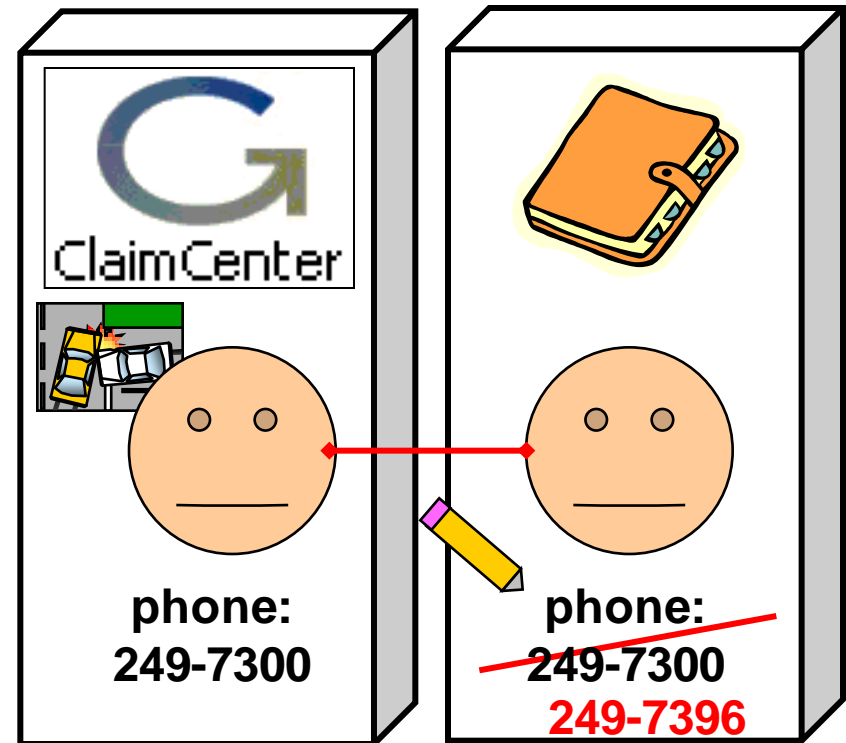
Roles

Related To
235-53-373872

Auto Repair Shop

Name European Autoworks

Additional Overall Rev



Syncing a Linked Contact

☐ ☒ European Autoworks Repair Shop No 514-249-7396

Basics Addresses Related Contacts Reviews

Edit Unlink **Copy from Address Book** View in Address Book

This contact is linked to the Address Book but is out of sync

Roles

Related To	Role
235-53-373872	Repair

Auto Repair Shop

Name	Additional Info
European Autoworks	Overall Review S

☐ ☒ European Autoworks Repair Shop No 514-249-7300

Basics Addresses Related Contacts Reviews

Edit Unlink View in Address Book

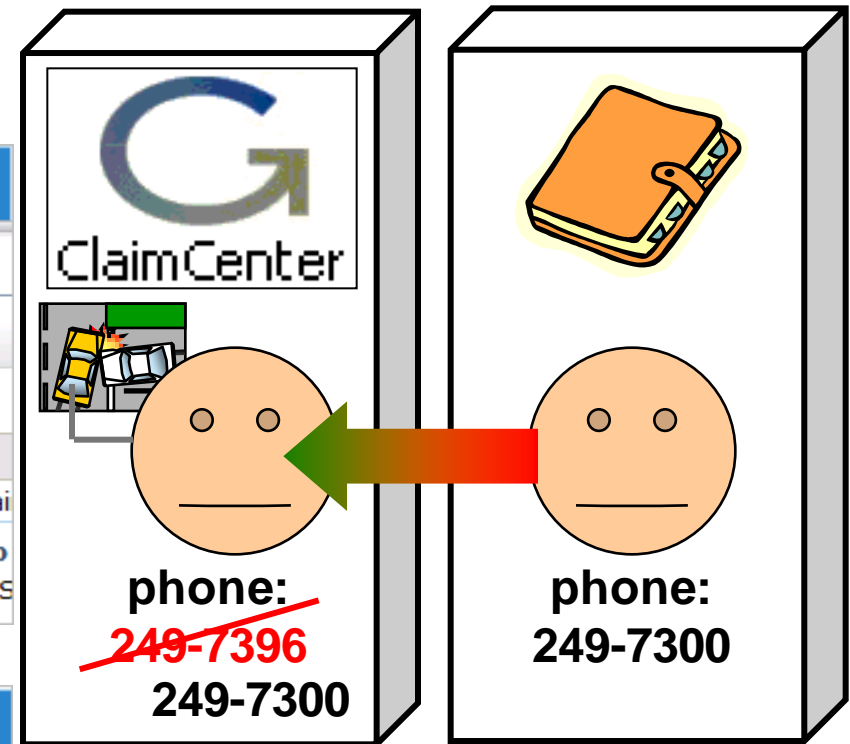
This contact is linked to the Address Book and is in sync

Roles

Related To	Role
235-53-373872	Repair

Auto Repair Shop

Name	Additional Info
European Autoworks	Overall Review S



- ▶ Syncing can be
 - Manually initiated from CC
 - Automatically triggered from AB when an AB contact is updated

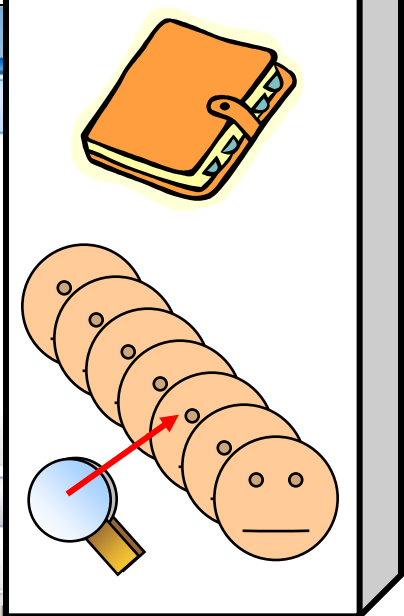
Lesson Outline

- ▶ Contact Basics
- ▶ ContactCenter
- ▶ Creating ClaimCenter Contacts
- ▶ Working with Linked Contacts
- ▶ Searching for Contacts

Searching for Address Book Contacts

- ▶ Searching for contacts can be done using different approaches to reduce time and improve quality of service. This includes searching
 1. by Name and/or Type of contact
 - For example, an Auto Repair Shop named Aamco Transmissions
 2. by Location and/or Proximity
 - For example, any Auto Repair Shop within 5 miles of the loss location
 3. by Preferred Status and/or by Performance Score
 - For example, an Auto Repair Shop who is a Preferred Vendor and whose Average Review Score is at least 80

Searching for a Specific Contact



Desktop | **Search** | **Address Book** | **Claim** | **Vacation**

Search

Search Address Book

Type: **Location**

Name: City

Tax ID: State

Preferred Vendors Only? ☐ Yes ☐ No ZIP Code

Minimum Score: Country

Search Results (1 - 1 of 1)

<input type="checkbox"/>	Name	Address	City	State	ZIP	Phone #
<input type="checkbox"/>	European Autoworks	9721				

European Autoworks (Return to Search Address Book)

Basics | **Addresses** | **Related Contacts** | **Activities** | **Claim**

Auto Repair Shop

Name: European Autoworks

Primary Address

Address Line 1: 9721 Whistler Dr

Searching Contacts Using Proximity Criteria

Search Address Book

i The actual center address used for this proximity search

Type *

Name

Tax ID

Preferred Vendors Only? ☐ Yes ☐ No

Minimum Score

Search for results close to this address

Search Radius

Line 1

Line 2

City

County

ZIP Code

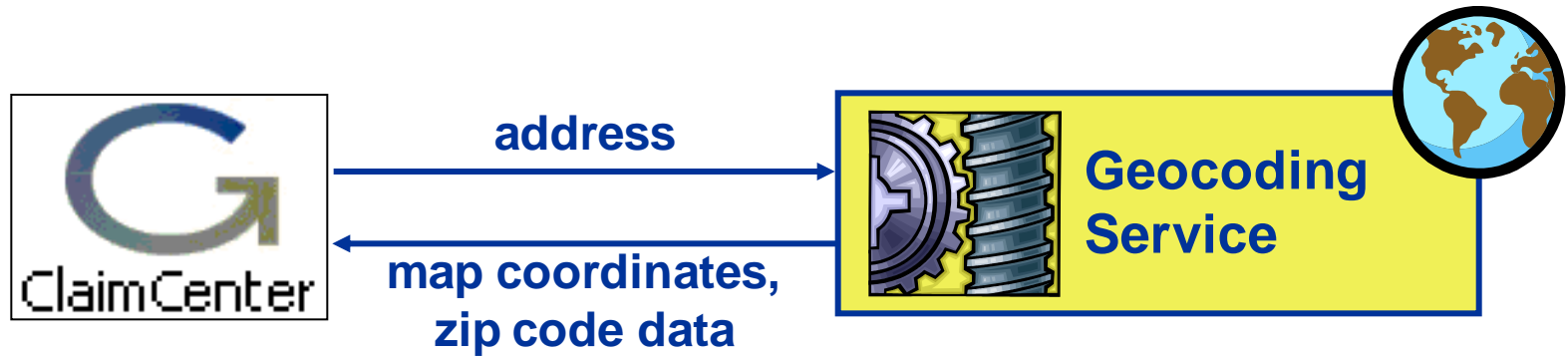
Country

Search Results (1 - 5 of 5)

<input type="checkbox"/>	Name▲	Address	#	Type	Overall Review Score	Proximate Distance
<input type="checkbox"/>	Austin Auto Glass	69 Cherry Circle	96-6092	Auto Repair Shop		0.0 kilometers
<input type="checkbox"/>	Edwards Performance Center	86 Chestnut Street	65-1938	Auto Repair Shop		7.6 kilometers
<input type="checkbox"/>	Cook Performance Center	71 Park Avenue	80-7478	Auto Repair Shop		10.2 kilometers
<input type="checkbox"/>	Morgan Auto Care	85 Willow Court	25-9260	Auto Repair Shop		12.7 kilometers
<input type="checkbox"/>	McMahon Service Center	77 Cherry Circle	18-1857	Auto Repair Shop		17.1 kilometers

- ▶ You can search either ClaimCenter or Address Book for contacts that meet a given proximity criteria

Geocoding Integration



- ▶ Many instances of ClaimCenter have an integration point to a geocoding service, such as Microsoft's MapPoint
 - This service provides longitude and latitude coordinates for a street address (or exchanges zip code for city/state and vice versa)

Service Provider Reviews

- ▶ Service Providers are contacts such as Auto Repair, Lawyers or Doctors
- ▶ You can review and track the performance of a service provider at the claim level for different categories of service
- ▶ Reviews are sent to ContactCenter which calculates aggregate review scores across different claims

Burlingame Saab ([Up to Search](#))

[Basics](#) [Addresses](#) [Related Contacts](#) [Reviews](#)

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

ABAutoRepairShop

Name Burlingame Saab

Primary Address

Address Line 1 825 N San Mateo Dr

Address Line 2

City Burlingame

County

State California

Postal Code 94401

Country United States of America

Type Business

Description Full service

Valid Until

Review Performance

Overall Review Score 74

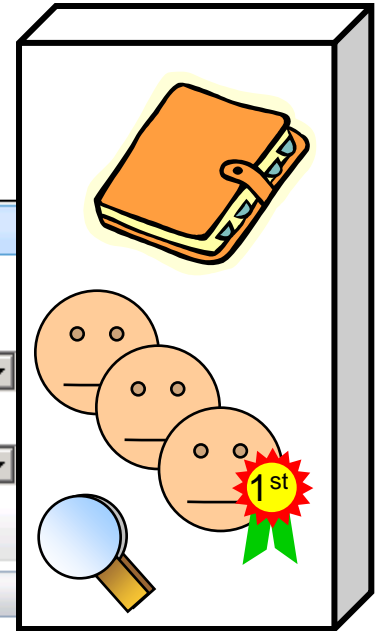
Category Scores

Category	Overall Score
Communication	79
Office Personnel	70
Quality of Work	70
Technicians	85
Timeliness	59



Searching Contacts Using Performance Scores

- ▶ Adjusters can search to only add providers that have a good track record



Search Address Book

Type **Location**
City
State
ZIP Code
Country

Name
Tax ID
Preferred Vendors Only? ☐ Yes ☐ No
Minimum Score

Search Results (1 - 1 of 1)

<input type="checkbox"/>	Name^	Address	City	State	ZIP	Phone #	Type	Overall Review Score
<input type="checkbox"/>	Burlingame Saab	825 N San Mateo Dr	Burlingame	California	94401		Auto Repair Shop	74

Preferred Vendors Only? ☐ Yes ☐ No
Minimum Score

Search Results (1 - 2 of 2)

<input type="checkbox"/>	Name^	Address	City	State	ZIP	Phone #	Type	Overall Review Score
<input type="checkbox"/>	Burlingame Saab	825 N San Mateo Dr	Burlingame	California	94401		Auto Repair Shop	74
<input type="checkbox"/>	Express Auto Repair	4701 El Camino Real	Burlingame	California	94401		Auto Repair Shop	

Viewing Performance Reviews

Address Book Claim (235-53-373871) Vacation Go to (Alt+/-)

Ins: **Brittany Turner** | DoL: **01/25/2008** | St: **Open** | Adj: **Betty Baker (Auto1 - TeamA)**

Contacts (Up to Contacts)
Contacts | Users

Basics Addresses Related Contacts Activities Claims Exposures Matters **Reviews**

Edit Unlink **View in Address Book**

**Claim
view**

All Reviews

☐ Review Type ☐ Relat

☒ ☐ Auto Repair Service

Review

General Information
Review Type Auto Repair Service
Claim # 235-53-3738

Address Book Claim (235-53-373871) Vacation Go to (Alt+/-)

Ins: **Brittany Turner** | DoL: **01/25/2008** | St: **Open** | Adj: **Betty Baker (Auto1 - TeamA)**

Burlingame Saab (Return to Contacts)
Contacts | Users

Basics Addresses Related Contacts Activities Claims Exposures Matters **Reviews**

All Reviews Add New Review Complete Selected

<input type="checkbox"/>	Review Type	Related To	Claim #	Review Score	Last Updated	Status
<input checked="" type="checkbox"/>	Auto Repair Service	(1) 1st Party Vehicle - Jim Means	000-00-000203	82	06/14/2008	Completed
<input type="checkbox"/>	Auto Repair Service		235-53-373871	65	06/14/2008	Completed

Review

General Information
Review Type Auto Repair Service
Claim # 000-00-000203

**Contact
view**

Creating New Performance Reviews

The screenshot displays the 'Contacts' management interface. At the top, there's a 'Contacts' header with a sub-header 'Contacts | Users'. Below this is a filter dropdown set to 'All' and buttons for 'New Contact' and 'Add Existing Contact'. A table lists contacts with columns: Name, Roles, Contact Prohibited?, and Phone. The first contact, 'Burlingame Saab', is selected. Below the table are tabs for 'Basics', 'Addresses', 'Related Contacts', and 'Reviews'. The 'Reviews' tab is active, showing an 'Edit' button (highlighted with a red box), 'Unlink', and 'View in Address Book' buttons. Below these are a 'Review Type' dropdown (set to 'All Reviews') and a 'Complete Selected' button. A table lists reviews with columns: Review Type, Related To, and Claim #. The first review, 'Auto Repair Service', is selected. A red arrow points from the 'Edit' button to a zoomed-in view of the 'Add New Review' dropdown menu, which shows 'Auto Repair Service' as the selected option.

Name	Roles	Contact Prohibited?	Phone
Burlingame Saab	Repair Shop	No	
Karen Egertson	Agent	No	213-457-6378
Kathy Hammet	Claimant, Driver, Injured Party	No	213-475-9465
Scott Shiu	Covered Party	No	619-275-2346
Brittany Turner	Insured, Claimant, Main Contact, Reporter, Driver	No	213-457-6378

Review Type	Related To	Claim #
Auto Repair Service		235-53-373871

Zoomed-in view of the 'Add New Review' dropdown menu:

- Add New Review
- Auto Repair Service

- ▶ You must be in edit mode in order to add a new review
- ▶ A drop down allows selection of service provider review types

Performance Review Question Sets

Category	
Timeliness	How quickly was the service provider able to schedule the repair? <input type="text" value="<none selected>"/>
	How long did it take to get an estimate? <input type="text" value="<none selected>"/>
	How timely were the repairs? <input type="text" value="Within 1 day of initial contact
Within 3 days of initial contact
More than 3 days from initial contact"/>
Communication	How would you rate the service provider's explanation of the needed repairs? <input type="text" value="<none selected>"/>
	Did the service provider obtain your authorization before beginning the repairs? <input type="text" value="<none selected>"/>
	Did the service provider satisfactorily answer any questions you had? <input type="text" value="<none selected>"/>
Office Personnel	Professionalism <input type="text" value="<none selected>"/>
	Helpfulness <input type="text" value="<none selected>"/>
	Knowledge <input type="text" value="<none selected>"/>
Technicians	Professionalism <input type="text" value="<none selected>"/>
	Helpfulness <input type="text" value="<none selected>"/>
	Knowledge <input type="text" value="<none selected>"/>
Quality of Work	How would you rate the quality of the service provider's work? <input type="text" value="<none selected>"/>
Accuracy of Quote	Were there any requotes? <input type="text" value="<none selected>"/>

Completed Provider Review and Scores

Category Scores		Category	Score
		Communication	83
		Office Personnel	70
		Quality of Work	70
		Technicians	70
		Timeliness	33
Category Timeliness			
		How quickly was the service provider able to schedule the repair?	Within 3 days of initial contact
		How long did it take to get an estimate?	Within 3 days of initial contact
		How timely were the repairs?	More than 3 days past estimate
Communication			
		How would you rate the service provider's explanation of the needed repairs?	Satisfactory
		Did the service provider obtain your authorization before beginning the repairs?	Yes
		Did the service provider satisfactorily answer any questions you had?	Yes
Office Personnel			
		Professionalism	Good
		Helpfulness	Good
		Knowledge	Good
Technicians			
		Professionalism	Good
		Helpfulness	Good
		Knowledge	Good
Quality of Work			
		How would you rate the quality of the service provider's work?	Satisfactory
Accuracy of Quote			
		Were there any requotes?	

Checking for Duplicates in the Address Book

Summary

Workplan

Loss Details

Exposures

Parties Involved

Policy

Financials

Notes

Documents

Plan of Action

Litigation

History

European Autoworks (Return to Contacts)

Contacts | Users

BasicsAddressesRelated ContactsActivities

PrintEditCheck for Duplicates

Auto Repair Shop

NameEuropean Autoworks

Primary Address

Address Line 19721 Whistler Dr

Address Line 2

CitySan Francisco

County

StateCalifornia

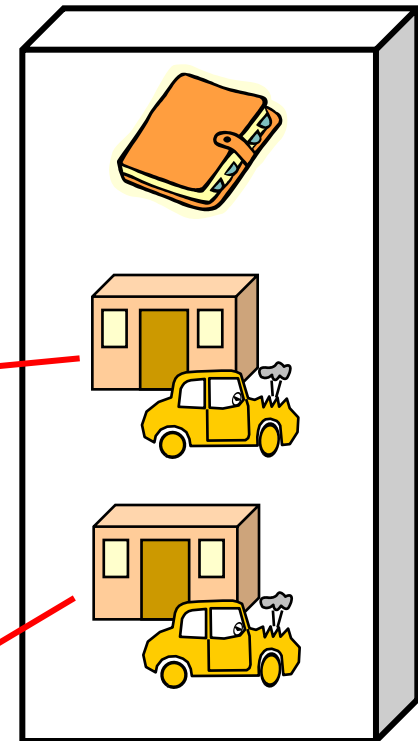
Matching ContactsMatching Contacts

Matching Contacts

Close

Delete

<input type="checkbox"/>	Name△	Address	City	State	ZIP	Phone
<input type="checkbox"/>	European Autoworks	Wistler	San Francisco	California		



Is this the
same auto
repair shop?

Lesson Objectives Review

You should now be able to:

- Describe the functionality of contacts
- Describe the functionality of ContactCenter
- Create contacts in ClaimCenter
- Work with contacts in ClaimCenter
- Describe approaches to searching for contacts

Review Questions

1. If "John Doe" is in the Address Book and is associated to three claims, how many contacts have the name "John Doe"?
2. Is it common or uncommon to have a contact that exists only in ClaimCenter? Only in Address Book?
3. What is true about a ClaimCenter contact when it is linked? When it is in sync?
4. What is the purpose of a contact role? A contact role "owner"?
5. How can you tell if a contact is linked and/or in sync?
6. How could you identify all the claims that a given contact is associated to?

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