Supervisors

Guidewire

6.0

Lesson Objectives

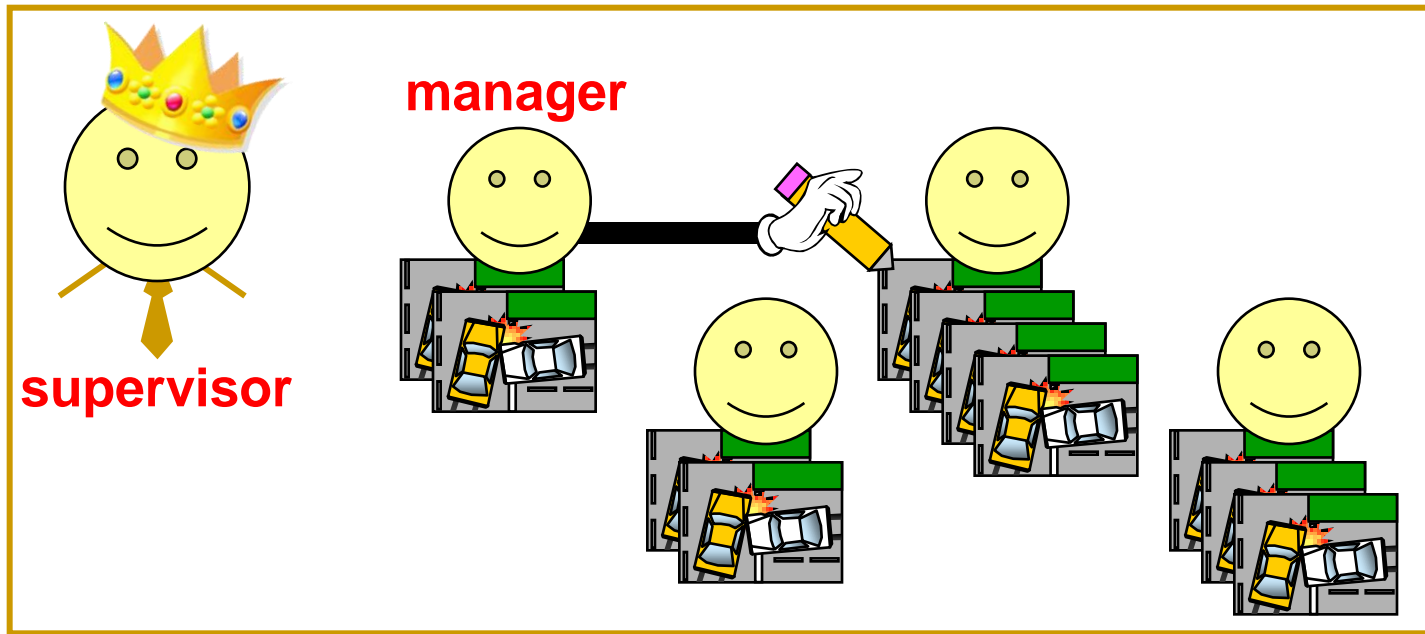By the end of this lesson, you should be able to:

- Describe the difference between a supervisor, a manager, and a regular end user

- Use the Team tab

- Describe how supervisors attend to claims and activities that require attention

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."

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Lesson Outline

▸ **Supervisor Basics**

▸ The Team Tab

▸ Objects That Require Attention

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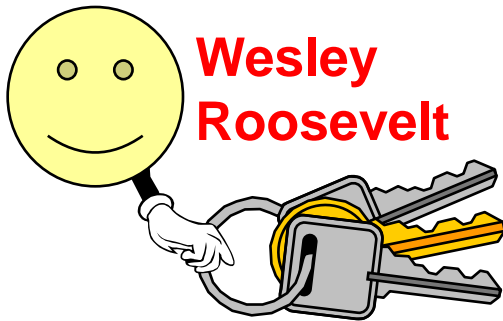# Supervisors and Managers (Business Perspective)

▶ Supervisor
- Responsible for ensuring group's work is completed

▶ Manager
- Responsible for occasionally accessing work assigned to others

Supervisors and Managers (Functional Perspective)
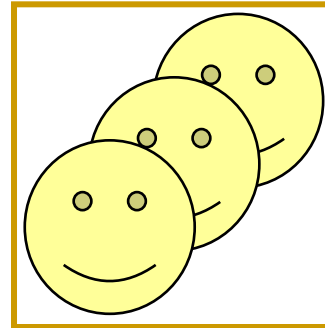
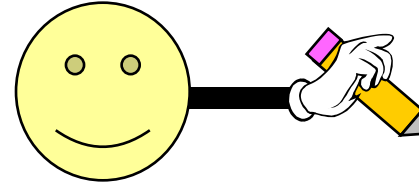**Wesley Roosevelt**

Supervisor

Isabel Harkin

Manager

Auto Adjusters

supervisor: Wesley Roosevelt
manager: Isabel Harkin
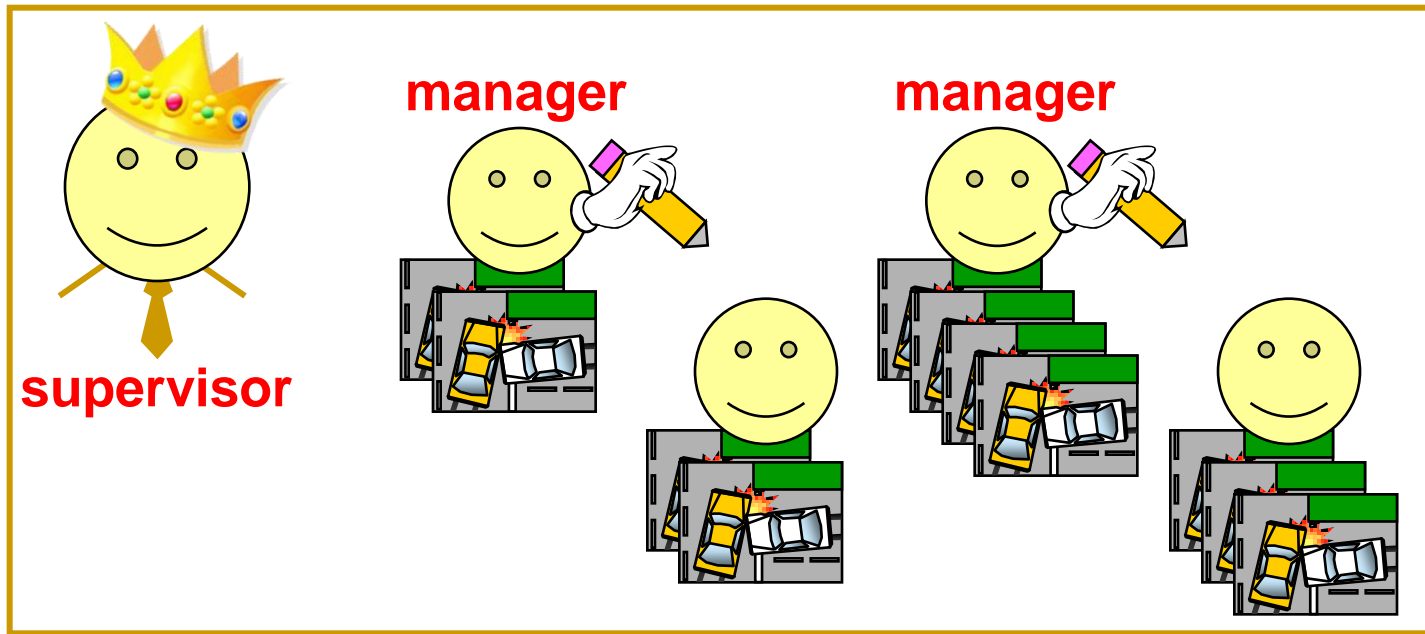
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Common Supervisor/Manager Abilities

▶ Access any object that any member of the group can access

▶ View summary information on Team tab about objects assigned to users in group

▶ Assign "Pending Assignment" claims
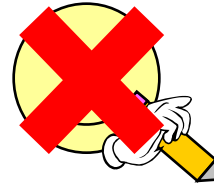
▶ Respond to objects that "need attention"

▶ Access any object that any member of the group can access

▶ View summary information on Team tab about objects assigned to users in group

Group Rules and Restrictions

▸ A group must have one and only one supervisor

▸ A group can have zero, one, or many managers

Review: The Pending Assignment List

▸ Typically, Pending Assignment is visible only to group supervisors

- Lists claims requiring manual assignment

Lesson Outline

▶ Supervisor Basics

▶ The Team Tab

▶ Objects That Require Attention
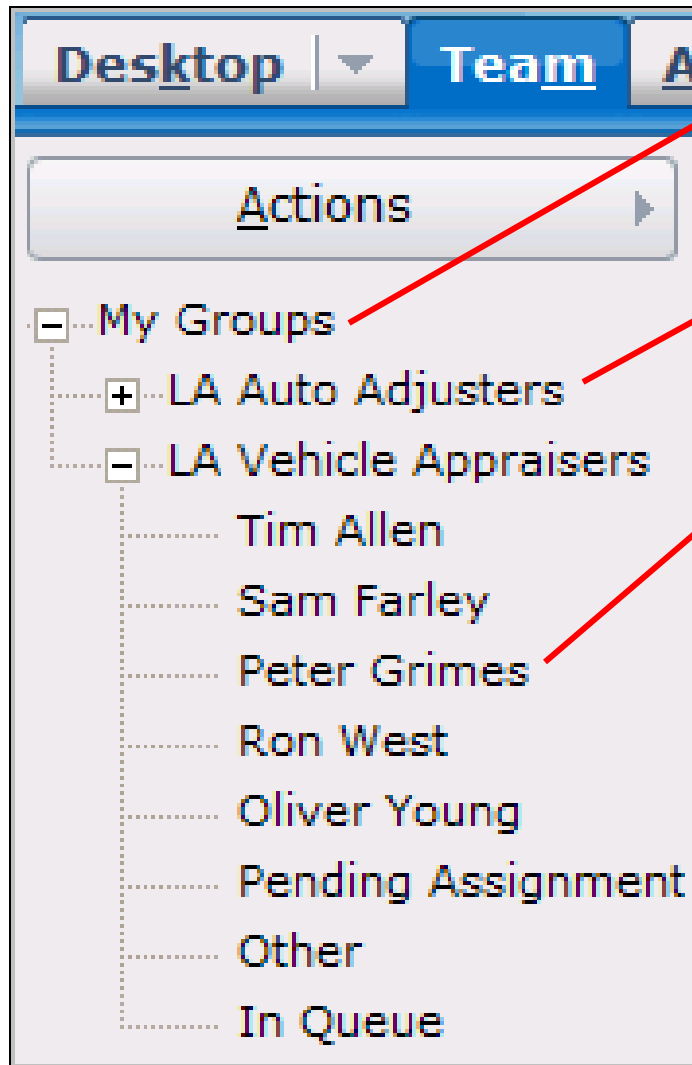
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The Team Tab

▶ Visible only for users who supervise or manage at least one group

▶ Lists information about objects assigned to:
- Any of those groups ("My Groups")
- A given group
- A given user in a given group

The Team Tab Tree View

display summary of objects owned by all groups listed

display summary of objects owned by this group

display summary of objects owned by this user

▶ Expandable view of each group the user supervises or manages

- Clicking a group or user displays information about objects assigned to that group or user
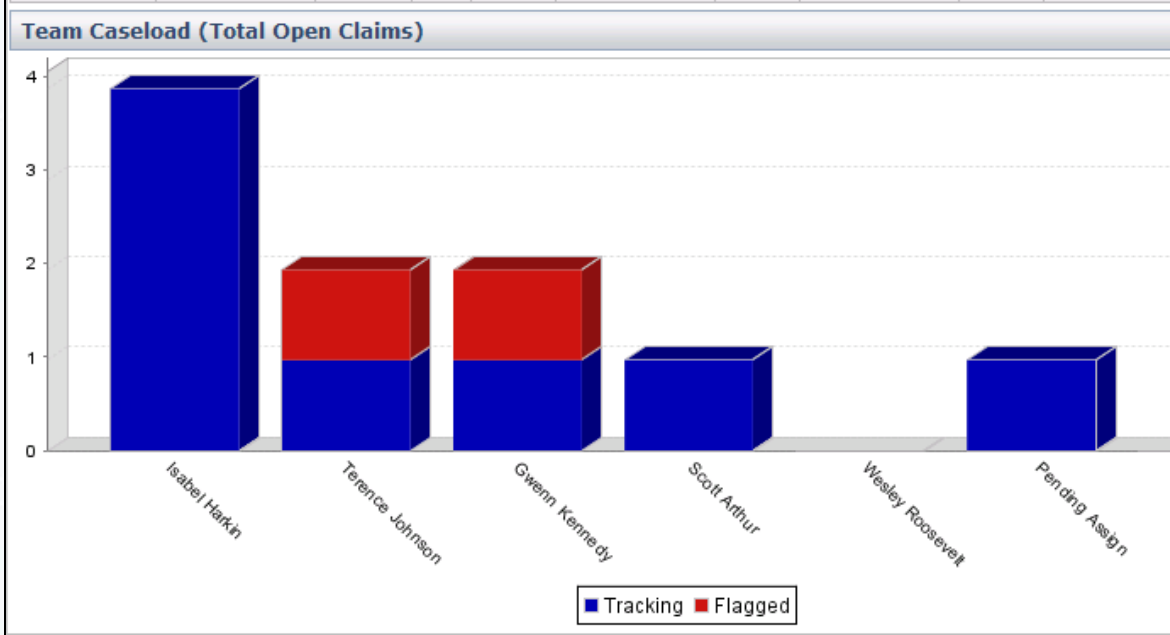
"My Groups" Screens

My Groups: Summary
Summary | Aging

Print/Export | As of: 06/05/2008 10:26 AM

Name	Claims				Exposures		Matters		Activities		
	Open	Flagged	New	Closed	Open	Closed	Open	Closed	Open	Overdue	Completed Today
LA Auto Adjusters	5	4	0	0	8	0	1	0	45	40	0
LA Vehicle Appraisers	1	1	0	0	0	0	0	0	4	3	0
Total	**6**	**5**	**0**	**0**	**8**	**0**	**1**	**0**	**49**	**43**	**0**

My Groups: Aging
Summary | **Aging**

Print/Export | As of: 06/05/2008 10:26 AM

Name	Claims: Open (Litigated)				Exposures			
	0 to 30 Days	31 to 60 Days	61 to 120 Days	Over 120 Days	0 to 30 Days	31 to 60 Days	61 to 120 Days	Over 120 Days
Total	6 (1)	0 (0)	0 (0)	0 (0)	8	0	0	0
LA Auto Adjusters	5 (1)	0 (0)	0 (0)	0 (0)	8	0	0	0
LA Vehicle Appraisers	1 (0)	0 (0)	0 (0)	0 (0)	0	0	0	0

▶ Summary: status of <u>all</u> assignable entities

▶ Aging: how long claims and exposures have been open

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Group Summary Screen

▶ List summarizes status of claims, exposures, matters, and activities for each user in group

▶ Graph summarizes data for open and flagged claims

Group Aging Screen

LA Auto Adjusters: Aging
Summary | **Aging** | Claims | Exposures | Activities | Matters

Print/Export | As of: 06/05/2008 01:17 PM

Name	Claims: Open (Litigated)				Exposures		
	0 to 30 Days	31 to 60 Days	61 to 120 Days	Over 120 Days	0 to 30 Days	31 to 60 Days	61 to 120
Total	10 (1)	0 (0)	0 (0)	0 (0)	15	0	0
Isabel Harkin	4 (1)	0 (0)	0 (0)	0 (0)	4	0	0
Terence Johnson	2 (0)	0 (0)	0 (0)	0 (0)	2	0	0
Gwenn Kennedy	2 (0)	0 (0)	0 (0)	0 (0)	5	0	0
Scott Arthur	1 (0)	0 (0)	0 (0)	0 (0)	2	0	0
Pending Assign/In Queue	1 (0)	0 (0)	0 (0)	0 (0)	2	0	0
Wesley Roosevelt (Supervisor)	0 (0)	0 (0)	0 (0)	0 (0)	0	0	0

▶ Lists information about number of days that claims and exposures assigned to each group member have been opened and not yet closed
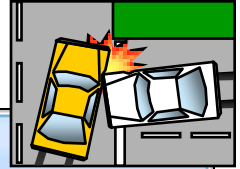
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Group Objects Screens

▸ Four screens (one for claims, exposures, activities, and matters)

- Each lists all objects owned by group

Given User Object Screens

Isabel Harkin: Claims (1 - 4 of 4)

Claims | Exposures | Activities | Matters

All open owned ▼ | Assign | Remove Flag || Print/Export

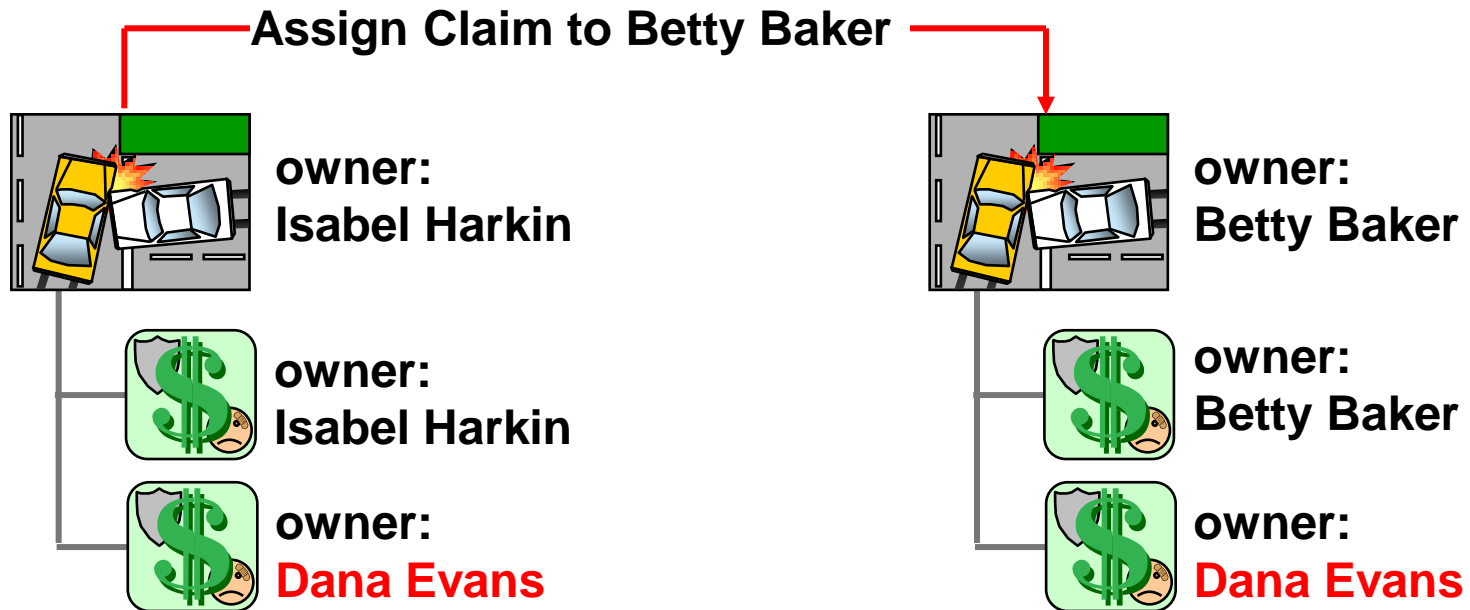| ☐	⚑ ▵	Claim ▵▵	Adjuster	Policy	Insured	Claimant	Net Total Incurred	Loss Date
☐		000-00-000203	Isabel Harkin	54-253465	Jim Means	Jim Means	$1,500.00	05/01/2008
☐		000-00-000505	Isabel Harkin	54-253465	Allen Robertson	Allen Robertson	$3,000.00	05/16/2008
☐		000-00-000605	Isabel Harkin	54-847564	Larry Gamney	Carl Rand, Judy Rand, Larry Gamney	$7,500.00	05/19/2008
☐		000-00-000705	Isabel Harkin	54-123456	Ray Newton	Ray Newton	$1,405.00	05/01/2008

▶ Four screens (one for claims, exposures, activities, and matters)

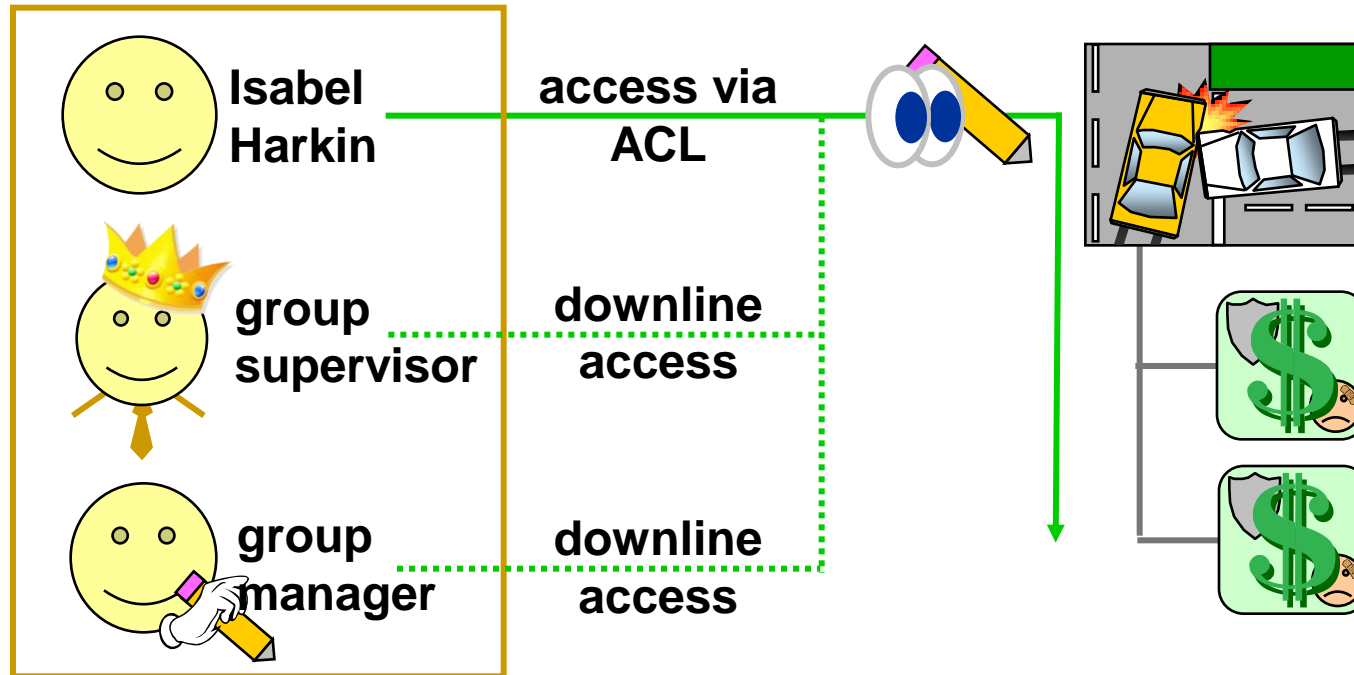- Each lists all objects owned by a user through the group

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Reassigning Objects

Assign Claim to Betty Baker

owner:
Isabel Harkin

owner:
Betty Baker

owner:
Isabel Harkin

owner:
Betty Baker

owner:
Dana Evans

owner:
Dana Evans

Downline Access

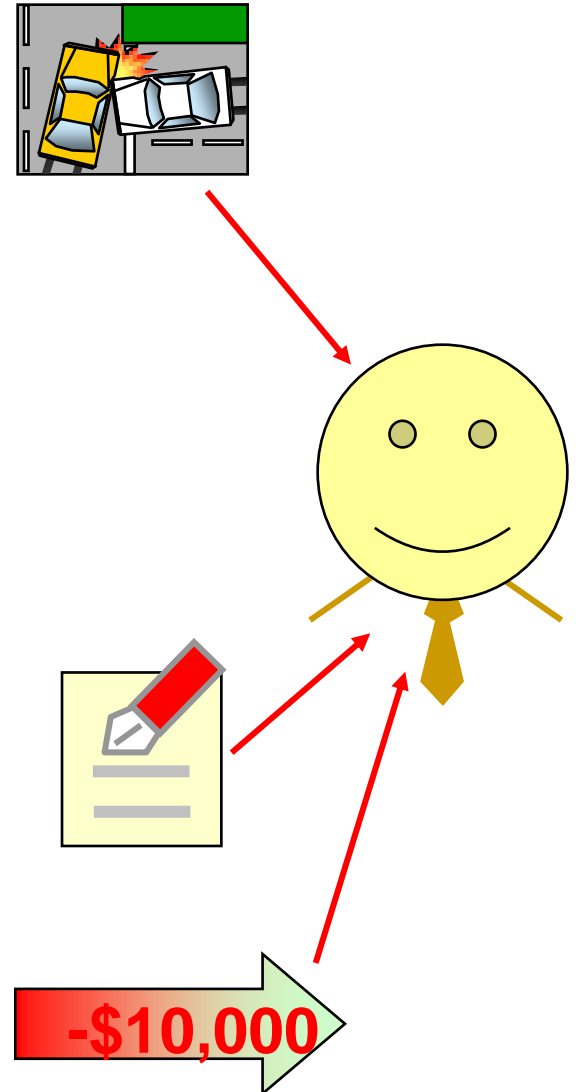|		
Isabel Harkin	**access via ACL**	
group supervisor	**downline access**	
group manager	**downline access**	

▸ Configuration option for ClaimCenter

- When set to true, supervisors and managers can access any claim that a member of the group and its subgroups can access

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Lesson Outline

▶ Supervisor Basics

▶ The Team Tab

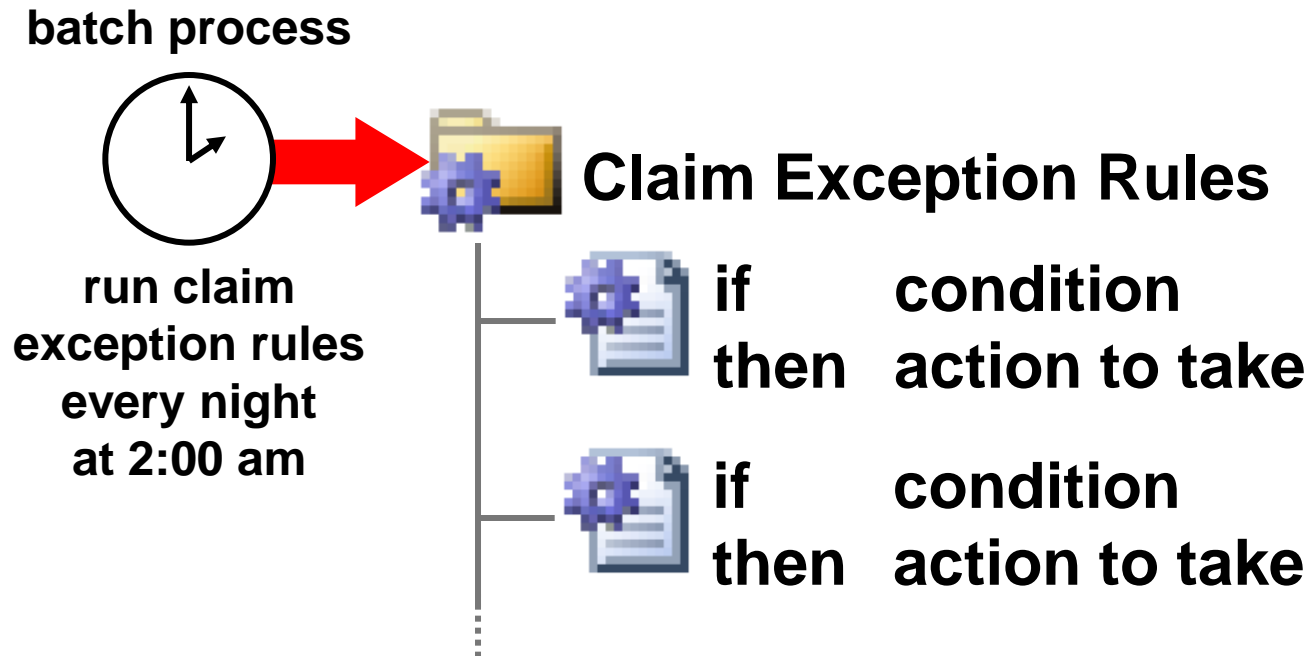▶ Objects That Require Attention

Review: Objects That Require Attention

▶ Claims, when important activity on claim has occurred, such as:

- Claim reported two weeks ago and fault rating has not be specified
- Auto is total loss and salvage is now required
- Lawyer for third-party claimant has been added

▶ Activities, when still open as of escalation date

▶ Transactions, when either:

- Amount exceeds a given threshold
- Given condition occurs

-$10,000

Objects That Require Attention

	Cause	System Response	Supervisor Response
Claim	▸ Remainder of lesson discusses each object type, including: • What causes it to "need attention"? • What does ClaimCenter do when it needs attention? • What is the supervisor expected to do in response?		
Activity			
Trans-action			

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What Causes a Claim To Need Attention?

batch process

run claim
exception rules
every night
at 2:00 am

Claim Exception Rules

if   **condition**
then   **action to take**

if   **condition**
then   **action to take**

▸ Claim exception rules check for claims that meet business criteria for "needing attention"

- Batch process executes claim exception rules

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How Does ClaimCenter Respond?

Claim Exception Rules

**if   claim reported 2 weeks ago
          and no fault rating set
then   set claim to flagged**

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Flag Information

How Does the Supervisor Respond?

▶ Supervisor should:

- Attend to the issue as appropriate, and then
- Remove flag

Claims That Require Attention

	Cause	System Response	Supervisor Response
Claim	- Exception rules set claim to flagged	- Flag icon displayed in info bar and list views	- Attend to the issue, THEN - Remove claim flag
Activity			
Trans-action			

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What Causes an Activity To Need Attention?

batch process

Activity Escalation Rules

run activity escalation rules every 30 minutes

if   **condition**
then   **action to take**

if   **condition**
then   **action to take**

▸ Activity escalation rules check for activities that are open passed the activity's escalation date

- Batch process executes activity escalation rules

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Review: Setting Escalation Points

Notification and Contact
Date of Notice   05/19/2008

escalation:
10 days

due: 05/20/2009
escalate on: 05/29/2009

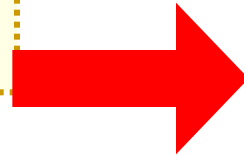| ☐	⭐	🗒	Due	Priority	Status	Subject▽
☐		🗒	05/20/2008	High	Open	Verify coverage

Activity Pattern Detail - Verify coverage (Up to Activity Patterns)

[Edit] [Delete]

Activity Pattern		**Activity Pattern Dates**	
Subject	Verify coverage	Target days	2
Short Subject		Target hours	
Class	Task	Target start point	Activity creation date
Type	General	Include these days	Business days
Category	Reminder	Business calendar type	Federal Holidays
Code	coverage	Escalation days	10
Priority	High	Escalation hours	
Mandatory	Yes	Escalation start point	Claim notice date
Calendar Importance	Not On Calendar	Include these days	Calendar days

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How Does ClaimCenter Respond?

Activity Escalation Rules

(always) create activity to alert supervisor about activity

if   activity is Verify Coverage then   set claim to flagged

	☆	🕑	Due	Priority	Status	Subject ▽
☐			05/20/2008	High	Open	Verify coverage

	☆	🕑	Due	Priority	Status	Subject ▽
☐		🕑	05/20/2008	High	Open	Verify coverage

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How Does the Supervisor Respond?

▸ Supervisor should attend to the issue as appropriate

▸ There is no mechanism to "unescalate" an activity

- Once escalated, activity remains escalated until closed

Activities That Require Attention

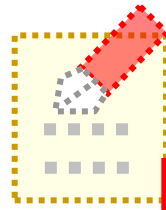|	Cause	System Response	Supervisor Response
Claim	- Exception rules set claim to flagged	- Flag icon displayed in info bar and list views	- Attend to the issue, THEN - Remove claim flag
Activity	- Activity is open on or after escalation date	- Escalation rules executed - Escalated icon displayed in list views	- Attend to the issue (such as reassign activity)
Trans-action			

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Financials Approval

+$50,000

▸ ClaimCenter reviews every transaction to determine if it requires approval

  • Financials approval is discussed in the Financials Approval lesson

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Lesson Objectives Review

You should now be able to:

- Describe the difference between a supervisor, a manager, and a regular end user

- Use the Team tab

- Describe how supervisors attend to claims and activities that require attention

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Review Questions

1. Name one thing:
   a) A supervisor can do that a manager cannot do.
   b) A manager can do that a regular user cannot do.

2. For each of the following, state if it describes claims, activities, or both.
   a) The only logic used to determine the object needs supervisor attention is time-based logic. No other logic is applied.
   b) A set of configurable business rules are used to determine if the object needs attention.
   c) An icon is used in list views to identify that the object needs attention.

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