

# 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.

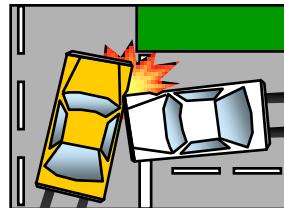
If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

# Lesson Outline

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

# Assignable Objects

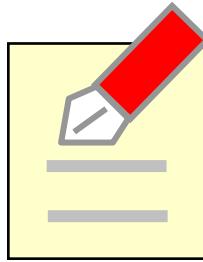
- ▶ An assignable object is an object that has work associated to it which must be completed by a user
- ▶ Four types of assignable objects in the base application:



**Claim**



**Exposure**

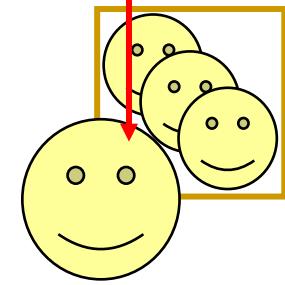
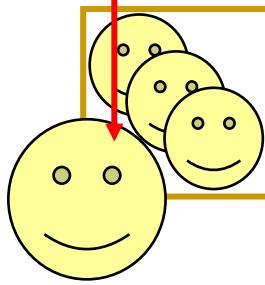
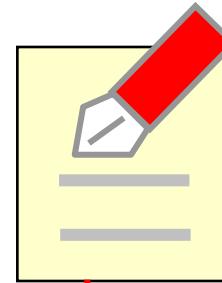
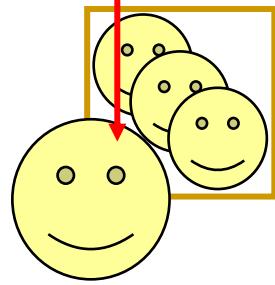
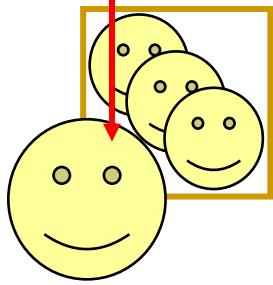
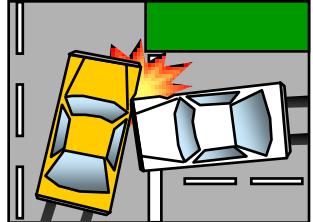


**Activity**



**Matter**

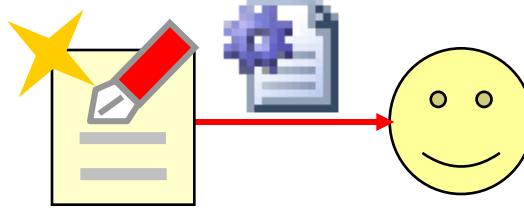
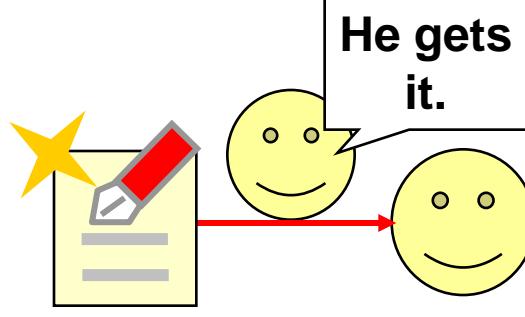
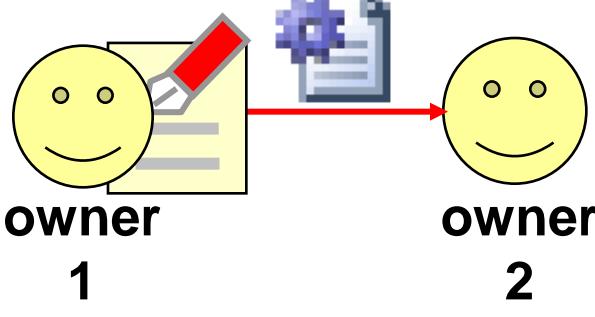
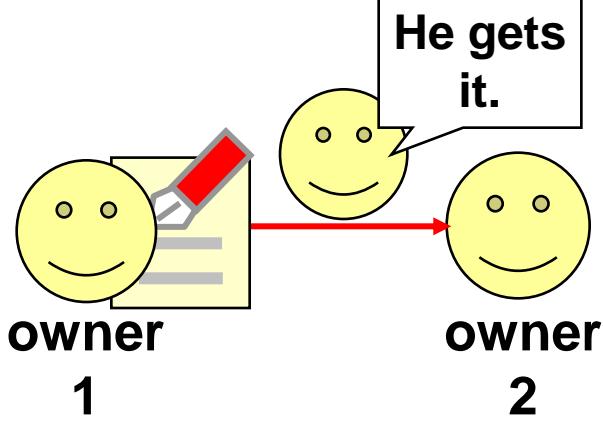
# The Outcome of Assignment



- ▶ 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

- (1) Assign claim and all exposures to:

Use automated assignment

Use automated assignment

Andy Applegate (Auto1 - TeamA)

- (2) Assign claim and all exposures to:

Use automated assignment

## Rules-Based Assignment

- (3) Assign claim and all exposures to:

Andy Applegate (Auto1 - TeamA)

## Explicit Assignment

# Reassigning an Existing Claim: Example

The screenshot shows a software interface for managing claims. A red arrow points from the 'Assign' button in the dialog box to the 'Assign Claim' option in a context menu.

**Context Menu (Top Right):**

- New ...
- New Activity**
  - Note
  - Email
  - Matter
  - Evaluation
  - Negotiation
- New Transaction**
  - Reserve
  - Check
- New Exposure**
  - Choose by Coverage Type
  - Choose by Coverage
- Claim Actions**
  - Assign Claim**

**Dialog Box (Bottom Left):**

**Assign (Return to Summary)**

**Summary** | Claim Status | Claim Health Metrics

**Select how you would like to do the assignment**

Select from list: Use automated assignment

Find a user or group:

Search For: User   
Last Name: dufraine  
First Name:  
User name:  
Group Name: <none selected>  
Role: <none selected>  
Attribute Name: <none selected>

**Location**

City:   
State: <none selected>  
ZIP Code: .....  
Country: <none selected>

# Reassigning an Existing Claim: Example, cont

**Assign (Return to Summary)**  
**Summary** | Claim Status | Claim Health Metrics

Select how you would like to do the assignment

Select from list:

Rules-Based

**Assign (Return to Summary)**  
**Summary** | Claim Status | Claim Health Metrics

Select how you would like to do the assignment

Select from list:   
 Find a user or group:

Search For  User   
Last Name   
First Name   
User name   
Group Name   
Role   
Attribute Name

**Search Results (1 - 1 of 1)**

	User	Group	Role
<input type="button" value="Assign"/>	William Dufraine	Midwest Property A	

Explicit

**Assign (Return to Summary)**  
**Summary** | Claim Status | Claim Health Metrics

Select how you would like to do the assignment

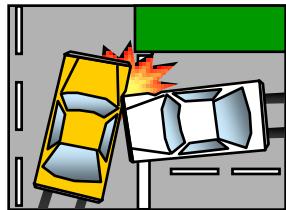
Select from list:   
 Find a user or group:

Search For  User   
Last Name   
First Name   
User name   
Group Name   
Role   
Attribute Name

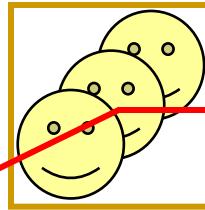
**Search Results (1 - 1 of 1)**

	User	Group	Role
<input type="button" value="Assign"/>	William Dufraine	Midwest Property A	

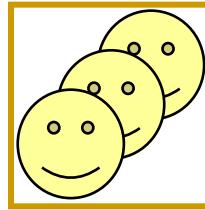
# Two Phases of Assignment Rules



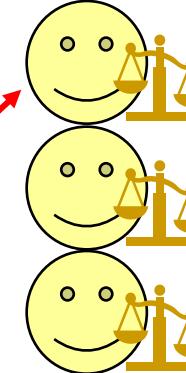
**Claim 100-00-000027**  
**location: California**  
**seg: mid-complexity**



**Western Normal  
Auto Adjusters**



**Western Complex  
Auto Adjusters**



**Peter Beebe**



**Dana Evans**



**Leroy Martel**



**Irvin Hickman**



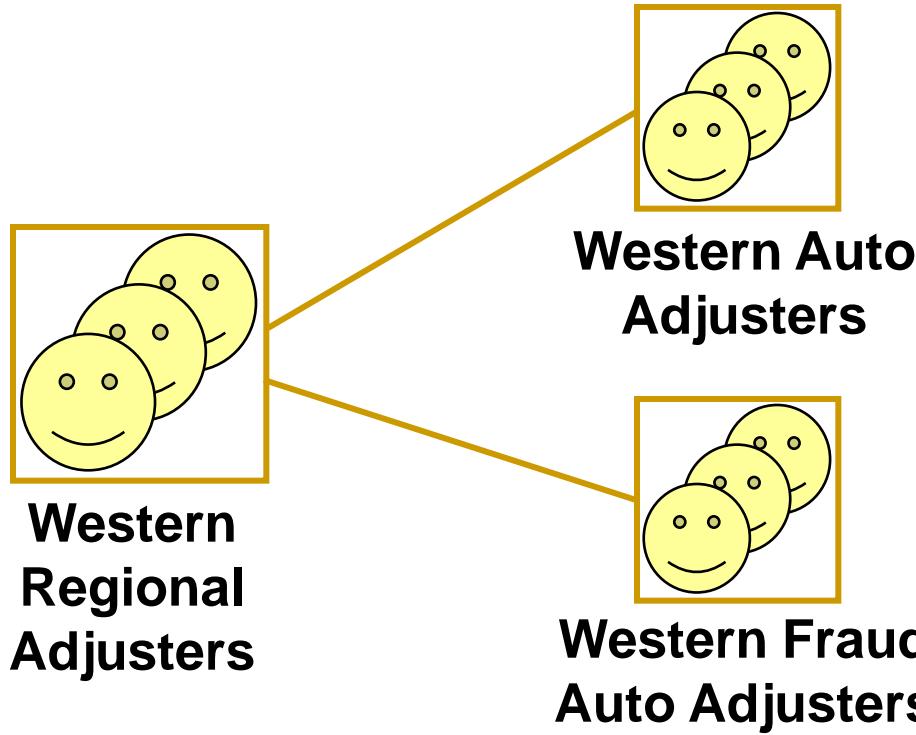
**Elias Marr**

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

# Lesson Outline

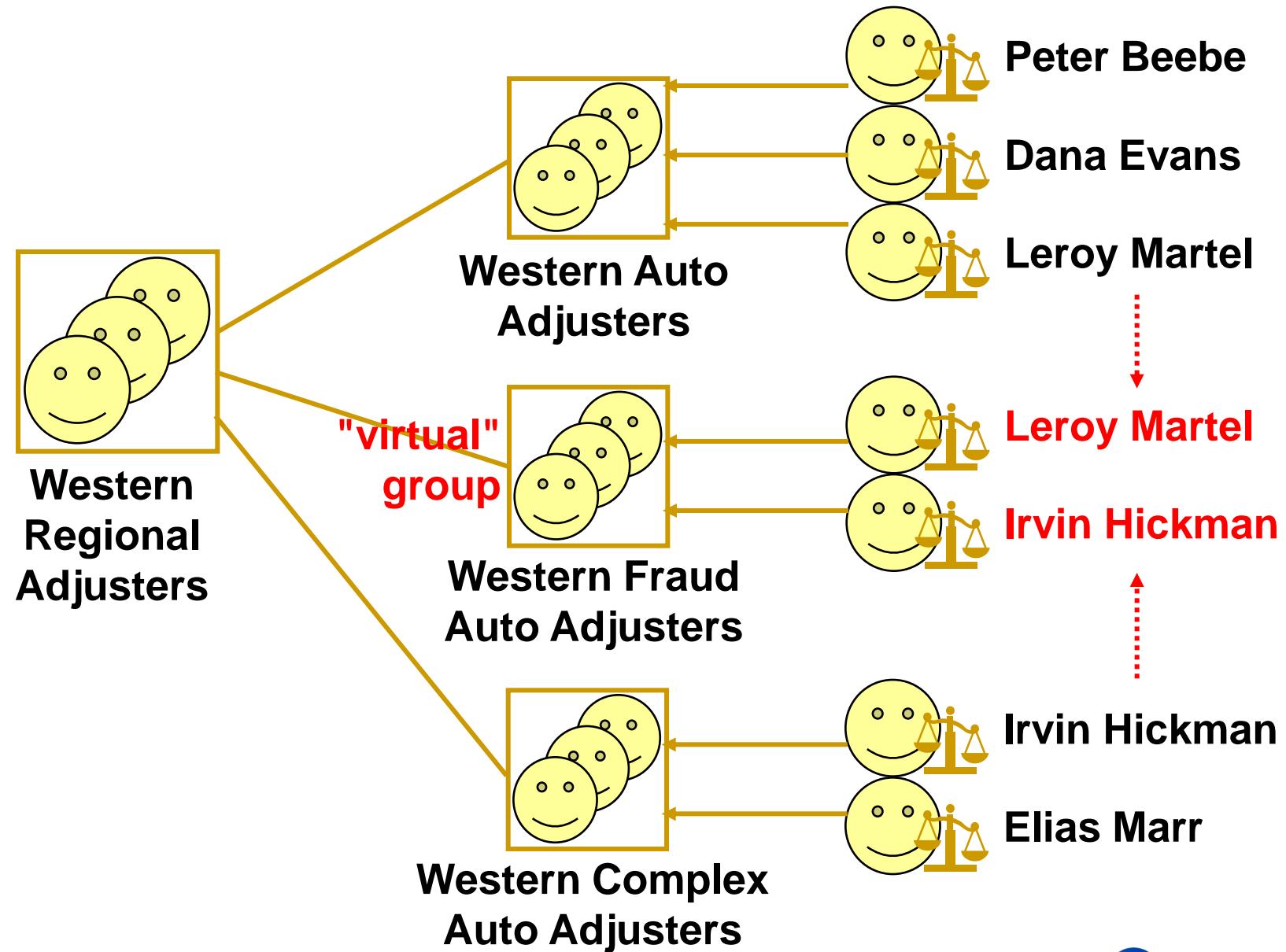
- ▶ Assignment Basics
- ▶ Group Assignment
- ▶ User Assignment via Rules
- ▶ User Assignment via Users

# Groups



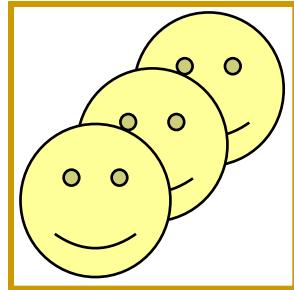
- ▶ A group is a collection of users who share a job function
  - The top-level group represents entire organization
  - Except for top-level group, every group has exactly one parent

# Users in Groups

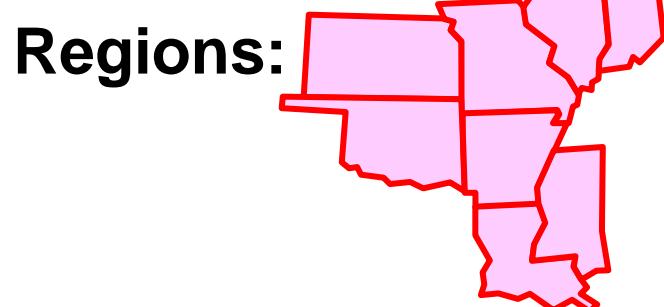


# Group Attributes Related to Assignment

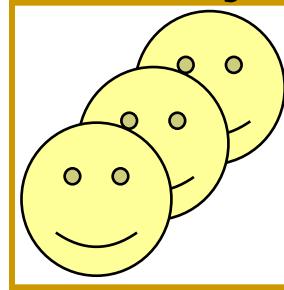
## Midwest Normal Auto Adjusters



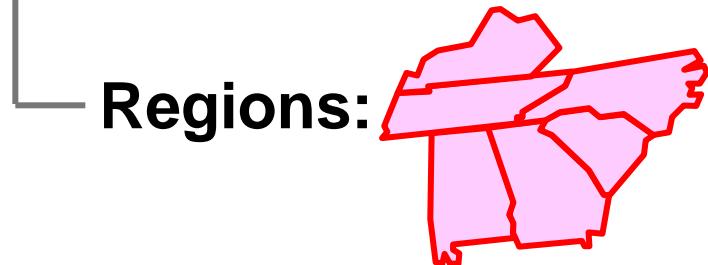
Type:  Auto Normal



## Southeast Medical WC Adjusters



Type:  WC Medical



# Group Type

**Auto1 - TeamB**

Edit Delete

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

Name	Auto1 - TeamB
Type	Auto
Parent	<a href="#">Auto - Level1</a>

**LA Liability Adjusters**

Edit Delete

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

Name	LA Liability Adjusters
Type	Liability - complex
Parent	<a href="#">Los Angeles Claims Center</a>

**San Diego Vehicle Appraisers**

Edit Delete

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

Name	San Diego Vehicle Appraisers
Type	Auto damage appraisers
Parent	<a href="#">Los Angeles Claims Center</a>

**Western Salvage Unit**

Edit Delete

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

Name	Western Salvage Unit
Type	Salvage unit
Parent	<a href="#">Western Regional Claims Center</a>

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

# Group Region

## Eastern States

Eastern Regional Claims Center	
<a href="#">Edit</a> <a href="#">Delete</a>	
<a href="#">Profile</a> <a href="#">Queues</a> <a href="#">Regions</a>	
Name	Areas Covered
Eastern Region	CT, DC, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, PR, RI, SC, VA, VT, WV

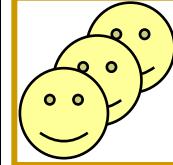
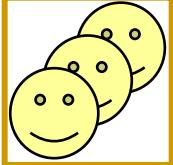
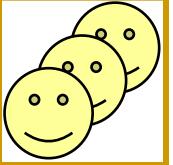
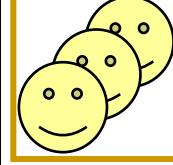
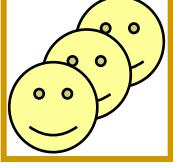
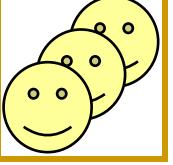
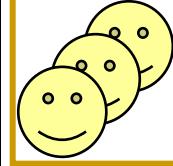
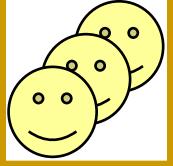
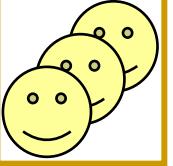
## LA Area & Hawaii

Los Angeles Claims Center	
<a href="#">Edit</a> <a href="#">Delete</a>	
<a href="#">Profile</a> <a href="#">Queues</a> <a href="#">Regions</a>	
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

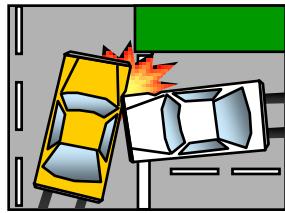
- ▶ A region is a geographic region, which can be based on locale-specific geographic entities such as cities or postal codes
- ▶ Groups can have one or more regions

# 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

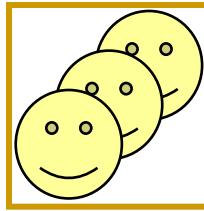
		TYPE		
		fast track	normal	workers' comp
		auto	auto	
REGION	west	 fast track auto west	 normal auto west	 workers' comp west
	central	 fast track auto central	 normal auto central	 workers' comp central
	east	 fast track auto east	 normal auto east	 workers' comp east

# Assignment Cannot Stop At the Group Level



**Claim 100-00-000027**  
**location: Missouri**  
**seg: mid-complexity**

**Midwest Normal  
Auto Adjusters**



**Midwest Complex  
Auto Adjusters**



**Peter Beebe**



**Dana Evans**



**Leroy Martel**



**Irvin Hickman**



**Elias Marr**

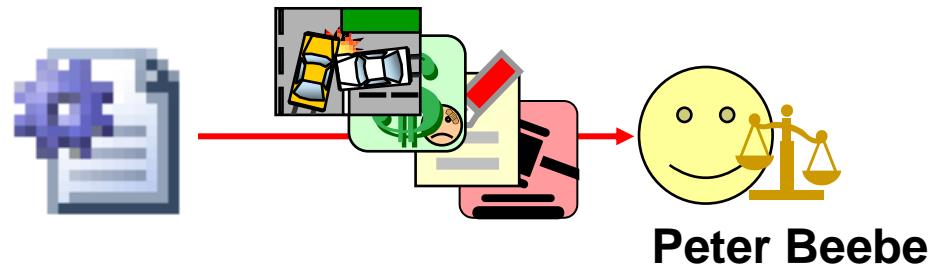
- ▶ Objects are not considered assigned until they are assigned to both group *and* user within that group

# Lesson Outline

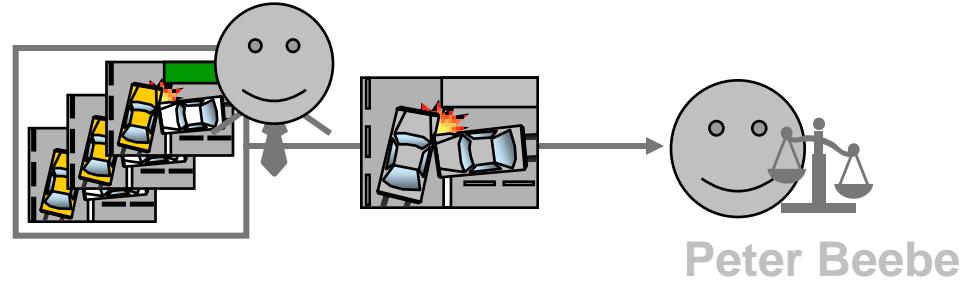
- ▶ Assignment Basics
- ▶ Group Assignment
- ▶ User Assignment via Rules
- ▶ User Assignment via Users

# Who Decides Which User Within the Group Gets the Object?

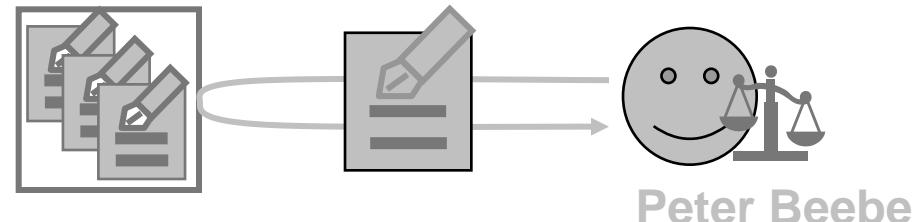
- ▶ Assignment rules



- ▶ Another user (typically a supervisor)



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

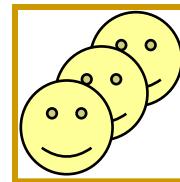


# User Attributes Related to Rule Assignment

Peter Beebe



**Groups & Load Factors:**



MW Normal  
Auto Adjust.  
(100)

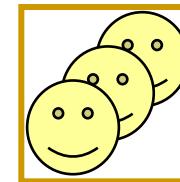
**Attributes:** A yellow smiley face icon with a speech bubble to its right containing the word "Espanol".

**Regions:** A pink silhouette of the state of Missouri, with a thin red outline.

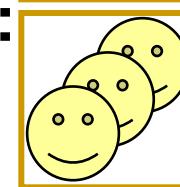
Leroy Martel



**Groups & Load Factors:**

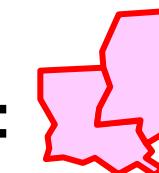


MW Normal  
Auto Adjust.  
(50)



MW Fraud  
Auto Adjust.  
(100)

**Attributes:** (none)



**Regions:**

# Group Assignment and Load Factors

**LA Auto Adjusters**

Edit Delete

**Profile**   **Queues**   **Regions**

Name	LA Auto Adjusters				
Type	Auto - complex				
Parent	<a href="#">Los Angeles Claims Center</a>				
Supervisor	<a href="#">Wesley Roosevelt</a>				
Security Zone	<a href="#">Auto and Property</a>				
Users	<input type="checkbox"/> <a href="#">User</a>	<a href="#">Member</a>	<a href="#">Manager</a>	<a href="#">Load Perm</a>	<a href="#">Load Factor</a>
	<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

The diagram illustrates a group assignment mechanism using a 'User' table and three separate 'Loss Details' windows for 'Claim 1', 'Claim 2', and 'Claim 3'.

**User Table:**

Name	LA Auto Adjusters						
Type	Auto - complex						
Parent	<a href="#">Los Angeles Claims</a>						
Supervisor	Wesley Roosevelt						
Security Zone	Auto and Property						
Users	<table border="1"><thead><tr><th>User</th></tr></thead><tbody><tr><td><input type="checkbox"/> Scott Arthur</td></tr><tr><td><input type="checkbox"/> Isabel Harkin</td></tr><tr><td><input type="checkbox"/> Terence Johnson</td></tr><tr><td><input type="checkbox"/> Gwenn Kennedy</td></tr><tr><td><input type="checkbox"/> Wesley Roosevelt</td></tr></tbody></table>	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
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							

**Claim 1 Loss Details:**

General	Loss Type: Auto	Line of Business: Auto
Primary Adjuster:	<a href="#">Scott Arthur</a>	

**Claim 2 Loss Details:**

General	Loss Type: Auto	Line of Business: Auto
Primary Adjuster:	<a href="#">Isabel Harkin</a>	

**Claim 3 Loss Details:**

General	Loss Type: Auto	Line of Business: Auto
Primary Adjuster:	<a href="#">Terence Johnson</a>	
Primary Group:	LA Auto Adjusters	

# User Attributes

The screenshot shows a user profile interface for 'Terence Johnson'. At the top, there are tabs for 'User Details', 'Activities', 'Claims', 'Exposures', and 'Matters'. Below these are buttons for 'Edit' and 'Link'. A navigation bar includes 'Basics', 'Profile', 'Authority Limits', 'Attributes' (which is selected), and 'Regions'. The main area displays a table of attributes:

<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-robined 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

The screenshot shows two panels from a Guidewire application. On the left is a 'Vehicle Exposure' record for 'Ray Newton'. It includes tabs for 'Edit', 'Assign', and 'Close Exposure'. Under the 'Details' tab, it lists 'Loss Party' as 'Insured's loss', 'Primary Coverage' as 'Collision', 'Coverage Subtype' as 'Collision - Vehicle Damage', 'Coverage' as '1997 Saturn SL (1HGJ465 / California)', and an 'Adjuster Group' of 'LA Auto Adjusters'. The 'Adjuster' field is highlighted with a red box. On the right is a 'User Details' panel for 'Terence Johnson'. It has tabs for 'User Details', 'Activities', 'Claims', 'Exposures', and 'Matters'. The 'Attributes' tab is selected, showing a table with four rows:

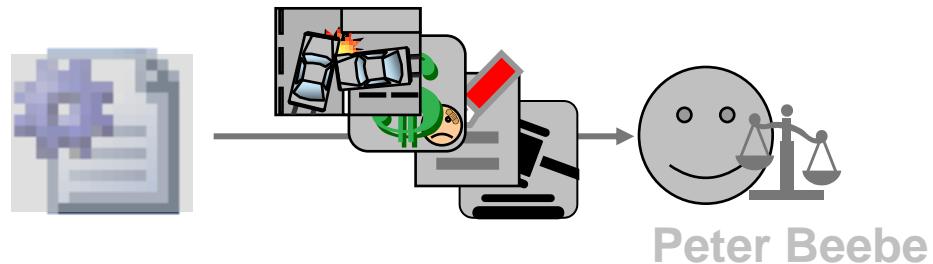
Attribute	Type	State	Value
Auto Glass	Expertise		
Auto Mechanical	Expertise	California	
Spanish Speaker	Language		4

# Lesson Outline

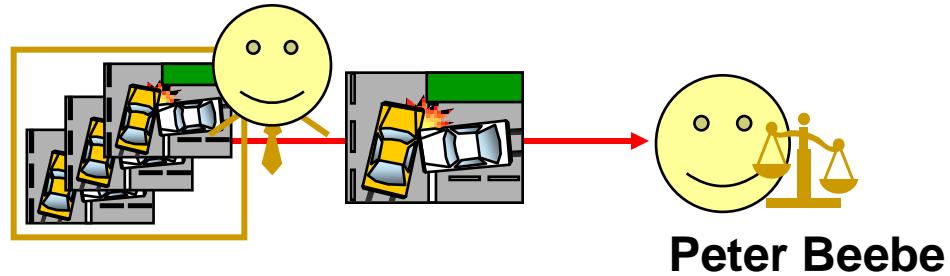
- ▶ Assignment Basics
- ▶ Group Assignment
- ▶ User Assignment via Rules
- ▶ User Assignment via Users

# Who Decides Which User Within the Group Gets the Object?

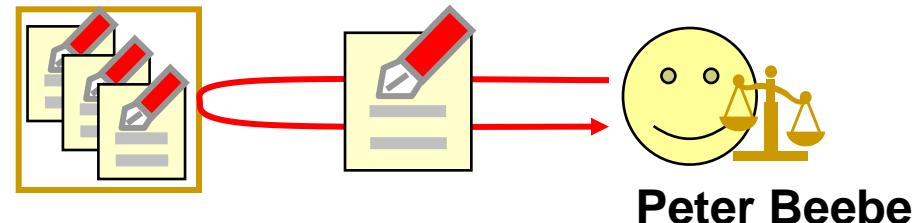
- ▶ Assignment rules



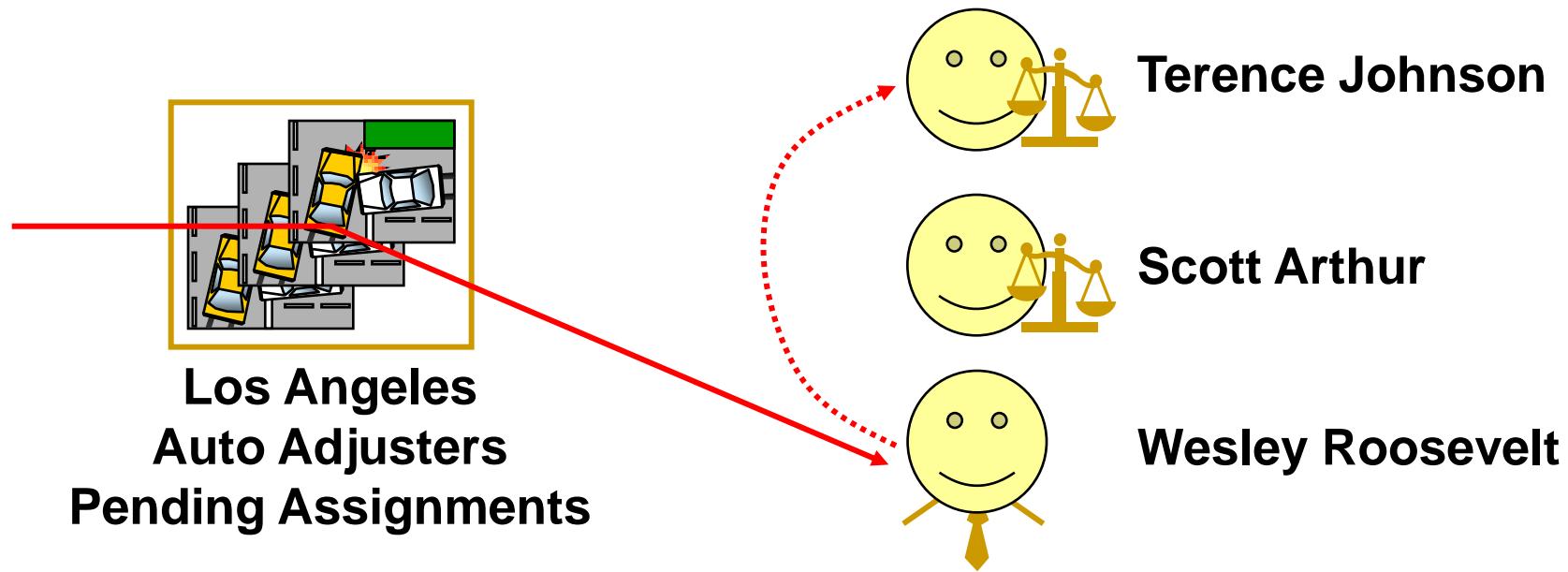
- ▶ Another user (typically a supervisor)



- ▶ 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](#)

[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

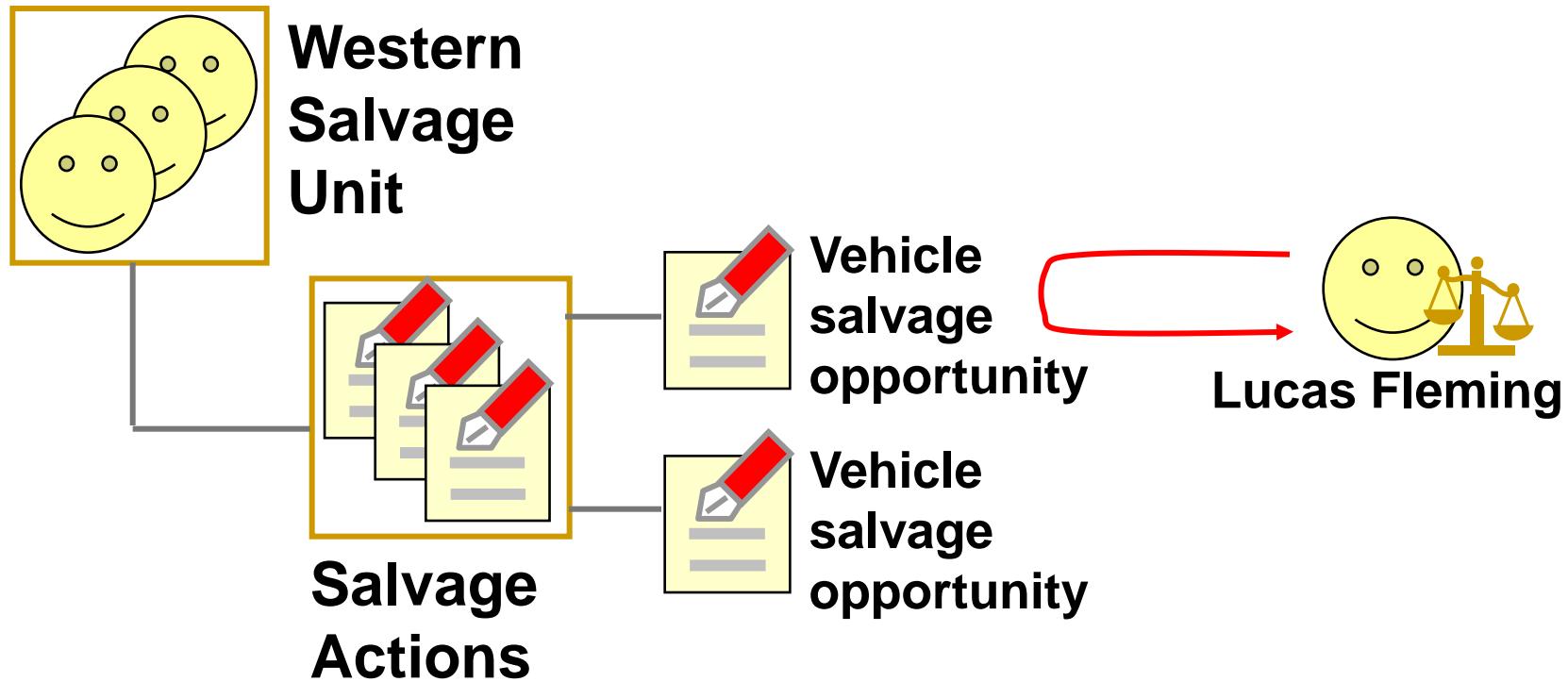
The screenshot shows the Guidewire ClaimCenter interface in Internet Explorer. The title bar reads "[DEV mode] Guidewire ClaimCenter (Wesley Roosevelt) - Windows Internet Explorer". The address bar shows the URL <http://localhost:8080/cc/ClaimCenter.do>. The main menu includes Desktop, Search, Team, Address Book, Claim, Vacation, and Go to (Alt+/). The left sidebar has links for Activities (0), Claims (0), Exposures (0), Pending Assignment (1), Queues (0), Calendar, and Bulk Invoices. The Pending Assignment link is highlighted with a red box. The main content area is titled "Pending Assignment (1 - 1 of 1)". It displays a table with one row:

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

Below this table is another identical table structure labeled "My pending assignments".

- ▶ 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"/>   <a href="#">View Notes</a>			
<b>Details</b>		<b>Activity Assignment</b>	
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

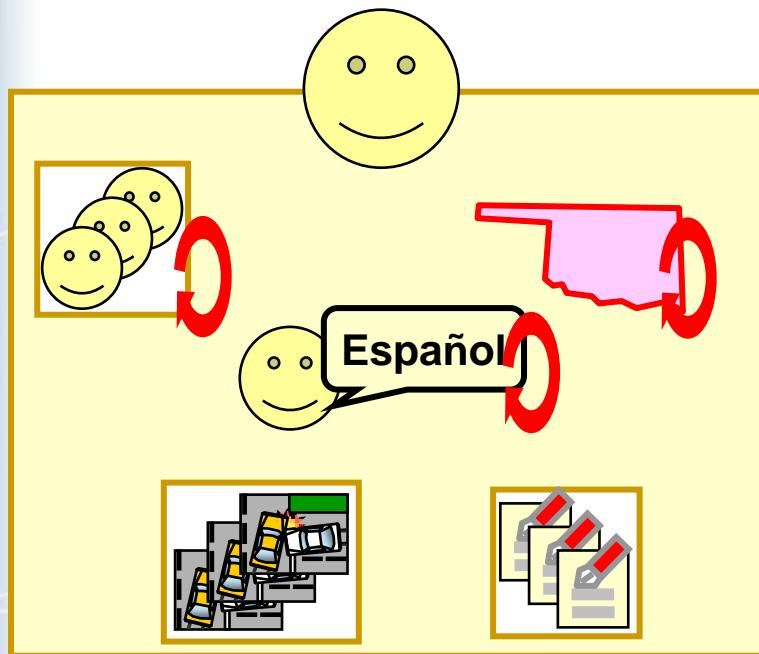
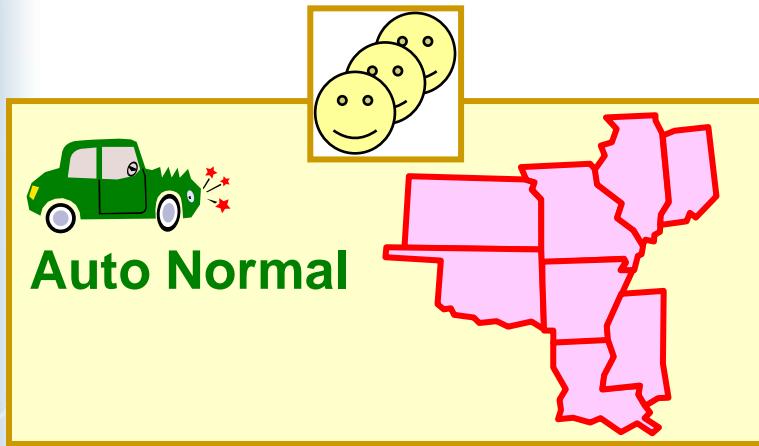
# Activities in a Queue: Example

The screenshot shows a software application window with a toolbar at the top containing 'Desktop', 'Search', 'Address Book', 'Claim', and 'Vacation' buttons, along with a 'Go to (Alt+ /)' button. On the left, a sidebar titled 'Actions' lists 'Activities (0)', 'Claims (0)', 'Exposures (0)', 'Queues (3)', 'Calendar', and 'Bulk Invoices'. The 'Queues (3)' item is selected and highlighted in blue. The main area is titled 'Queued Activities (1 - 3 of 3)' and displays a table for the 'Salvage Actions - Western Salvage Unit (3)' queue. The table columns are: Star icon, Recycle bin icon, Queued (link), Due (red text), Priority, Subject, Claim (link), and Insured (link). The data rows are:

Star icon	Recycle bin icon	Queued (link)	Due (red text)	Priority	Subject	Claim (link)	Insured (link)
		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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