

# Supervisors

# 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.

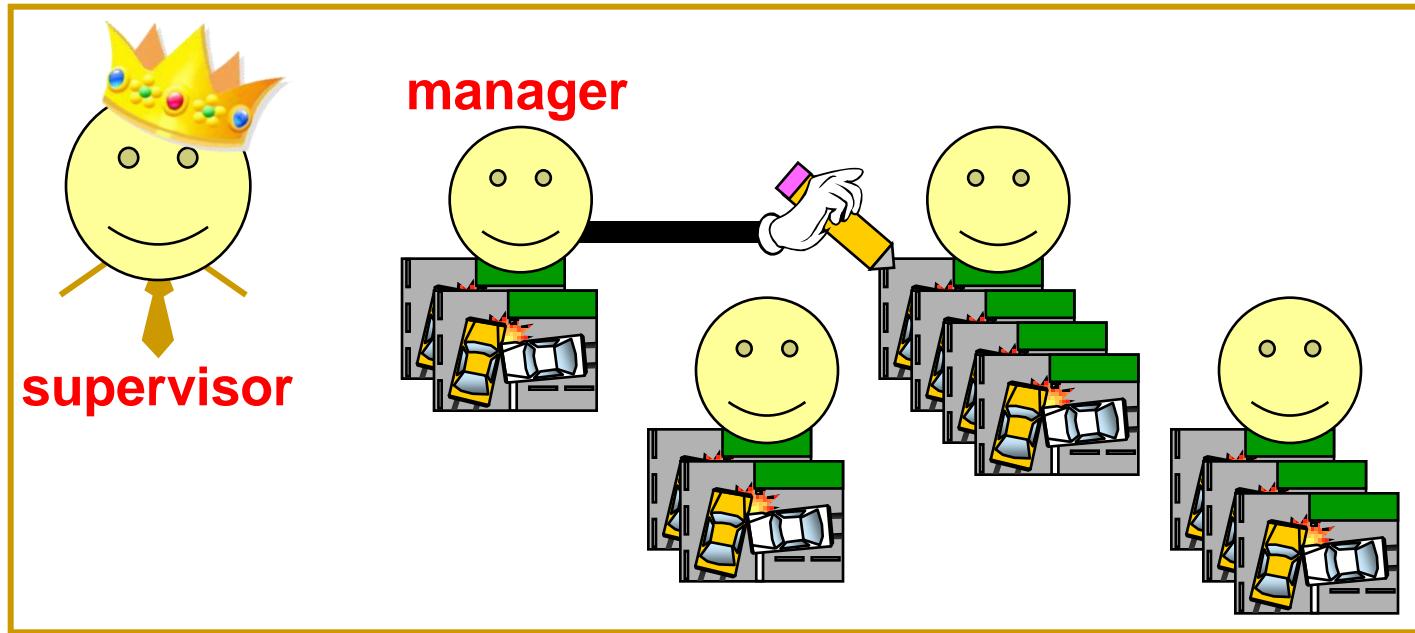
To view the notes in PowerPoint, choose View→Normal or View→Notes Page.

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

# Lesson Outline

- ▶ Supervisor Basics
- ▶ The Team Tab
- ▶ Objects That Require Attention

# Supervisors and Managers (Business Perspective)



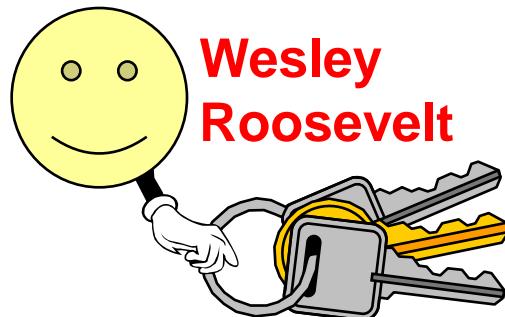
## ► Supervisor

- Responsible for ensuring group's work is completed

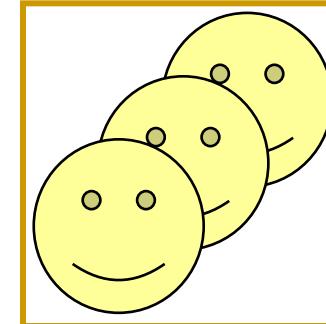
## ► Manager

- Responsible for occasionally accessing work assigned to others

# Supervisors and Managers (Functional Perspective)

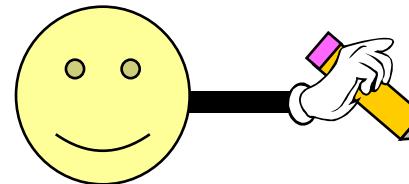


**Auto Adjusters**



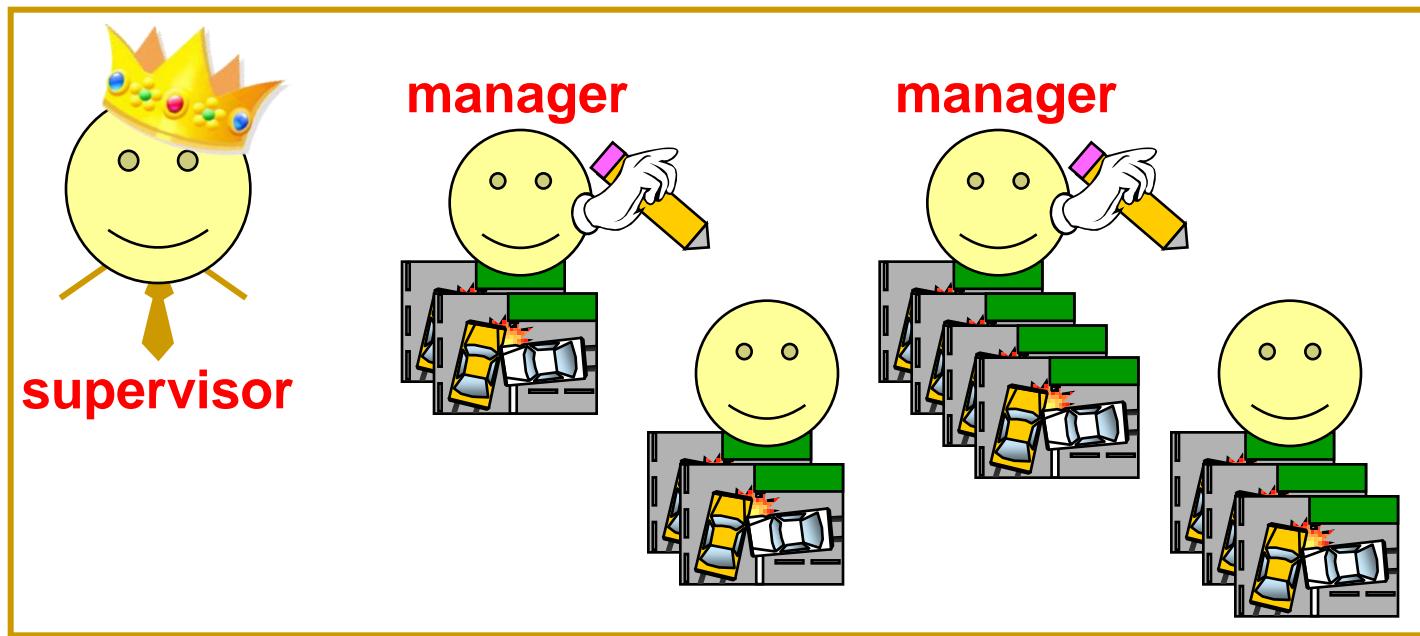
**supervisor: Wesley Roosevelt**  
**manager: Isabel Harkin**

# Common Supervisor/Manager Abilities



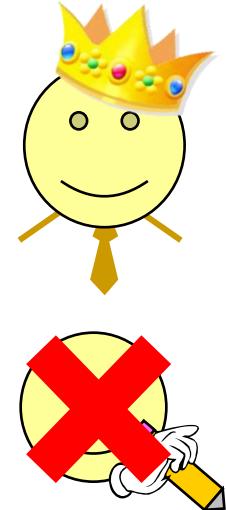
- ▶ Access any object that any member of the group can access
- ▶ View summary information on Team tab about objects assigned to users in group
- ▶ Assign "Pending Assignment" claims
- ▶ Respond to objects that "need attention"
- ▶ Access any object that any member of the group can access
- ▶ View summary 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



Screenshot of the Guidewire ClaimCenter interface showing the Pending Assignment list:

The browser title is "[DEV mode] Guidewire ClaimCenter (Wesley Roosevelt) - Windows Internet Explorer". The address bar shows "http://localhost:8080/cc/ClaimCenter.do". The main menu includes Desktop, Search, Team, Address Book, Claim, Vacation, and Go to (Alt+/). The sub-menu for 'Pending Assignment' is highlighted with a red box.

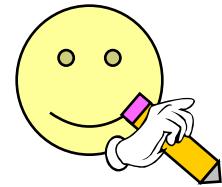
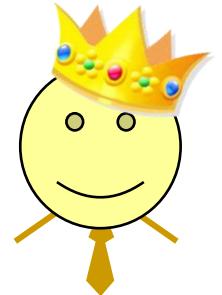
The main content area displays the "Pending Assignment (1 - 1 of 1)" list. It shows one pending assignment for "Robert Farley" on "05/19/2008" for claim "000-00-000103". Buttons for Assign, Reassign Activity, and Print/Export are available.

- ▶ 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

# The Team Tab



Screenshot of the Team tab interface showing the 'My Groups: Summary' page.

The navigation bar includes: Desktop, Search, Team (selected), Address Book, Claim, Vacation, and Go to (dropdown).

The left sidebar shows 'Actions' and a tree view of 'My Groups': LA Auto Adjusters and LA Vehicle Appraisers.

The main content area displays the 'My Groups: Summary' page with the following details:

- Print/Export button and timestamp: As of: 06/05/2008 09:55 AM
- Table headers: Claims, Exposures, Matters, Activities
- Table rows:
  - LA Auto Adjusters: Open 5, Flagged 4, New 0, Closed 0, Open 8, Closed 0, Open 1, Closed 0, Open 45, Overdue 40, Completed today 0
  - LA Vehicle Appraisers: Open 0, Flagged 0, New 0, Closed 0, Open 0, Closed 0, Open 0, Closed 0, Open 2, Overdue 2, Completed today 0
  - Total: Open 5, Flagged 4, New 0, Closed 0, Open 8, Closed 0, Open 1, Closed 0, Open 47, Overdue 42, Completed today 0

- ▶ 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

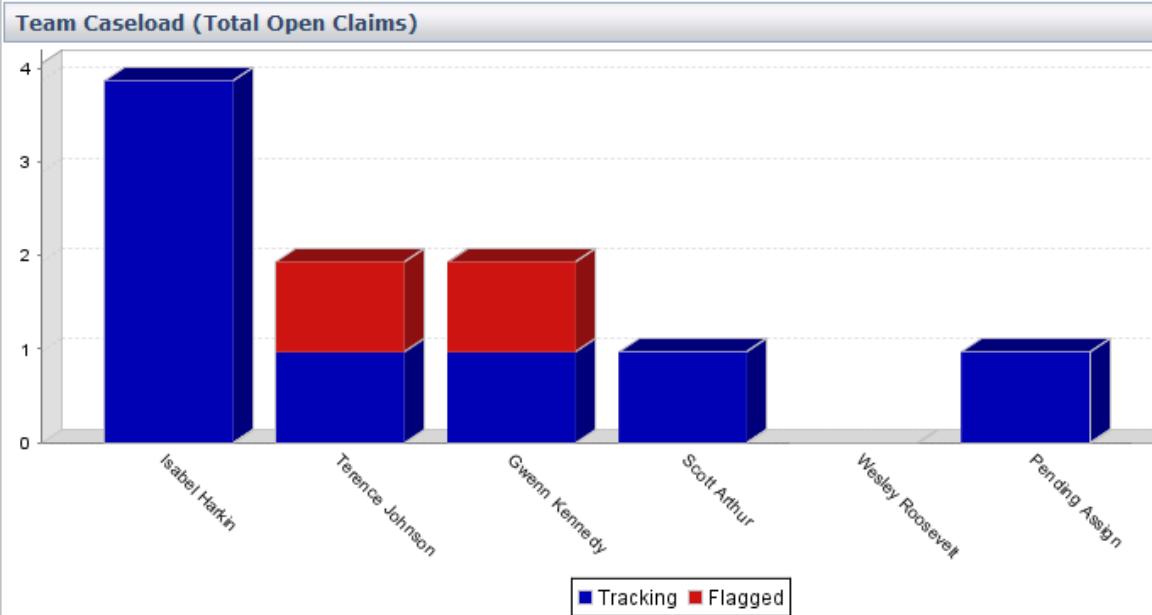
My Groups: Summary												
Summary   Aging												
		Claims				Exposures		Matters		Activities		
Name	Open	Flagged	New	Closed	Open	Closed	Open	Closed	Open	Overdue	Completed Today	
LA Auto Adjusters	5	4	0	0	8	0	1	0	45	40	0	
LA Vehicle Appraisers	1	1	0	0	0	0	0	0	4	3	0	
<b>Total</b>	<b>6</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>49</b>	<b>43</b>	<b>0</b>	

My Groups: Aging									
Summary   Aging									
		Claims: Open (Litigated)				Exposures			
Name	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 all assignable entities
- ▶ Aging: how long claims and exposures have been open

# Group Summary Screen

LA Auto Adjusters: Summary									
<a href="#">Summary</a>   <a href="#">Aging</a>   <a href="#">Claims</a>   <a href="#">Exposures</a>   <a href="#">Activities</a>   <a href="#">Matters</a>									
Print/Export   As of: 06/05/2008 01:17 PM									
	Claims				Exposures		Matters		
Name	Open (Global)	Flagged	New	Closed	Open (Global)	Closed	Open (Global)	Closed	Open (Global)
Isabel Harkin	4 (4)	0	0	0	4 (4)	0	1 (1)	0	24 (24)
Terence Johnson	2 (2)	1	0	0	2 (2)	0	0 (0)	0	5 (5)
Gwenn Kennedy	2 (2)	1	0	0	5 (5)	0	0 (0)	0	8 (8)
Scott Arthur	1 (1)	0	0	0	2 (2)	0	0 (0)	0	18 (18)
Pending Assign/In Queue	1	0	0	0	2	0	0	0	3
Wesley Roosevelt (Supervisor)	0 (0)	0	0	0	0 (0)	0	0 (0)	0	1 (1)
Other	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>10</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>15</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>59</b>



- ▶ 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							
<a href="#">Summary</a>   <b>Aging</b>   <a href="#">Claims</a>   <a href="#">Exposures</a>   <a href="#">Activities</a>   <a href="#">Matters</a>							
<a href="#">Print/Export</a>		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

# Group Objects Screens



**LA Auto Adjusters: Activities (1 - 15 of 51)**

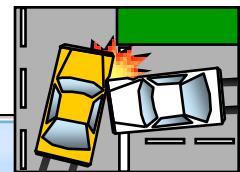
[Summary](#) | [Aging](#) | [Claims](#) | [Exposures](#) | **Activities** | [Matters](#)

Overdue only    Page

<input type="checkbox"/>		Due	Priority	Subject	Claim	Insured	Assigned To
<input type="checkbox"/>		05/05/2008	Urgent	<a href="#">Make initial contact with insured</a>	<a href="#">000-00-000203</a>	<a href="#">Jim Means</a>	Isabel Harkin
<input type="checkbox"/>		05/07/2008	Urgent	<a href="#">Make initial contact with insured</a>	<a href="#">000-00-000103</a>	<a href="#">Robert Farley</a>	Pending Assignment
<input type="checkbox"/>		05/08/2008	Urgent	<a href="#">Make initial contact with claimant</a>	<a href="#">000-00-000103</a>	<a href="#">Robert Farley</a>	Scott Arthur
<input type="checkbox"/>		05/12/2008	Urgent	<a href="#">Make initial contact with insured</a>	<a href="#">000-00-000304</a>	<a href="#">Brittany Turner</a>	Gwenn Kennedy
<input type="checkbox"/>		05/13/2008	Urgent	<a href="#">Make initial contact with claimant</a>	<a href="#">000-00-000304</a>	<a href="#">Brittany Turner</a>	Gwenn Kennedy
<input type="checkbox"/>		05/18/2008	Urgent	<a href="#">Contact insured</a>	<a href="#">000-00-000505</a>	<a href="#">Allen Robertson</a>	Isabel Harkin
<input type="checkbox"/>		05/21/2008	Urgent	<a href="#">Contact insured</a>	<a href="#">000-00-000508</a>	<a href="#">Larry Gamney</a>	Terence Johnson

- ▶ 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)								
<a href="#">Claims</a>   <a href="#">Exposures</a>   <a href="#">Activities</a>   <a href="#">Matters</a>								
All open owned			<a href="#">Assign</a>	<a href="#">Remove Flag</a>	<a href="#">Print/Export</a>			
<input type="checkbox"/>		<a href="#">Claim</a>	<a href="#">Adjuster</a>	<a href="#">Policy</a>	<a href="#">Insured</a>	<a href="#">Claimant</a>	<a href="#">Net Total Incurred</a>	<a href="#">Loss Date</a>
<input type="checkbox"/>		<a href="#">000-00-000203</a>	Isabel Harkin	54-253465	<a href="#">Jim Means</a>	Jim Means	\$1,500.00	05/01/2008
<input type="checkbox"/>		<a href="#">000-00-000505</a>	Isabel Harkin	54-253465	<a href="#">Allen Robertson</a>	Allen Robertson	\$3,000.00	05/16/2008
<input type="checkbox"/>		<a href="#">000-00-000605</a>	Isabel Harkin	54-847564	<a href="#">Larry Gamney</a>	Carl Rand, Judy Rand, Larry Gamney	\$7,500.00	05/19/2008
<input type="checkbox"/>		<a href="#">000-00-000705</a>	Isabel Harkin	54-123456	<a href="#">Ray Newton</a>	Ray Newton	\$1,405.00	05/01/2008

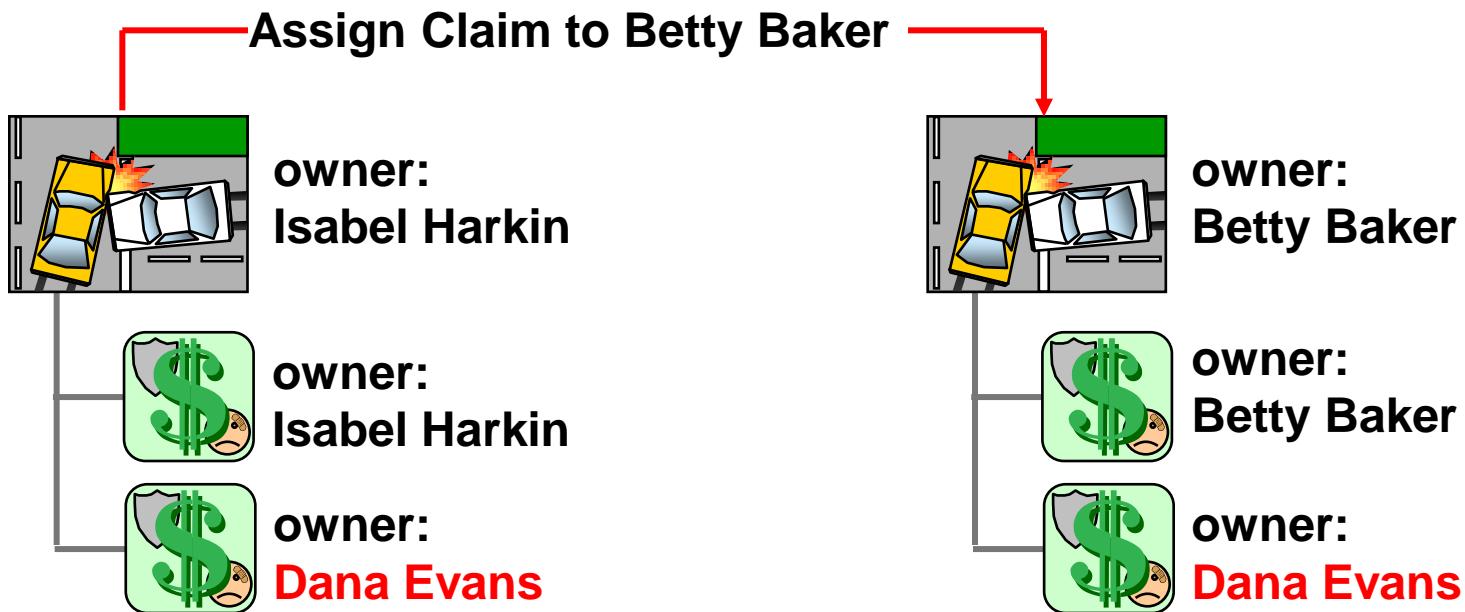
- ▶ Four screens (one for claims, exposures, activities, and matters)
  - Each lists all objects owned by a user through the group

# Reassigning Objects

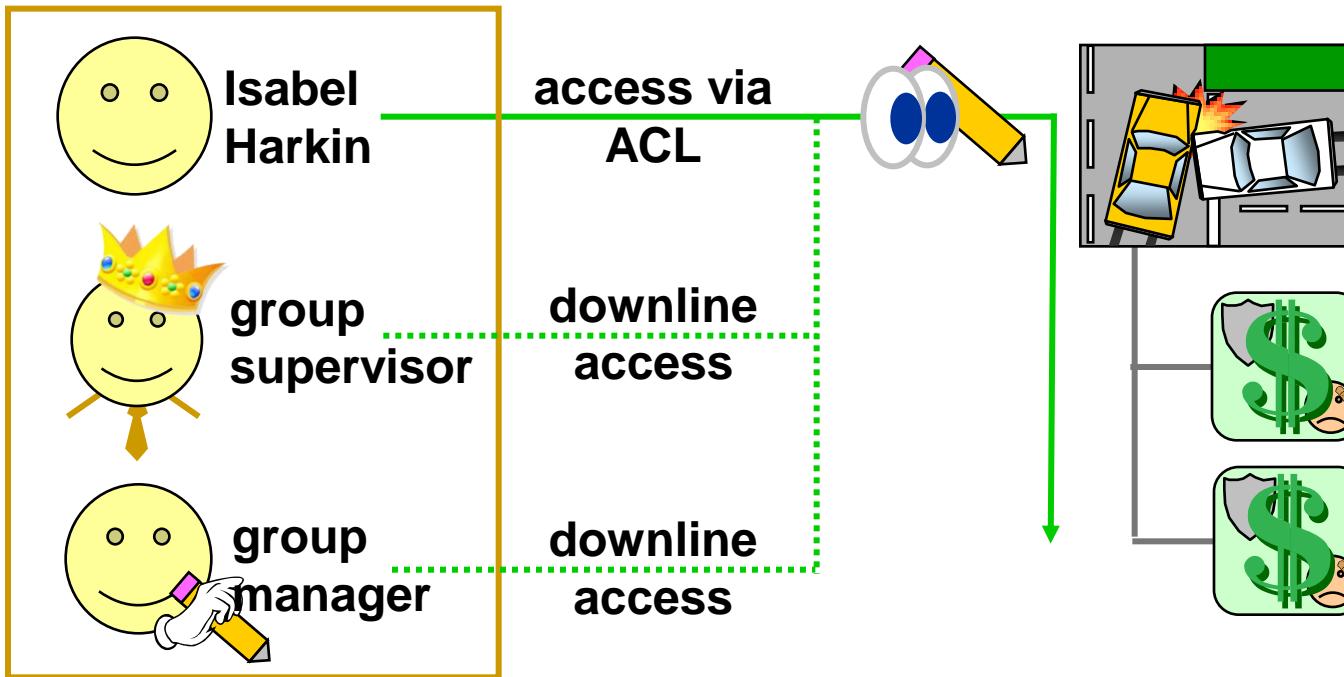
**Isabel Harkin: Claims (1 - 4 of 4)**

[Claims](#) | [Exposures](#) | [Activities](#) | [Matters](#)

All open owned		<a href="#">Assign</a>	<a href="#">Remove</a>
<input type="checkbox"/>	 Claim	<a href="#">Adjuster</a>	<a href="#">Policy</a>
<input checked="" type="checkbox"/>	<a href="#">000-00-000705</a>	Isabel Harkin	54- 123456
<input type="checkbox"/>	<a href="#">000-00-000203</a>	Isabel Harkin	54- 253465



# Downline Access



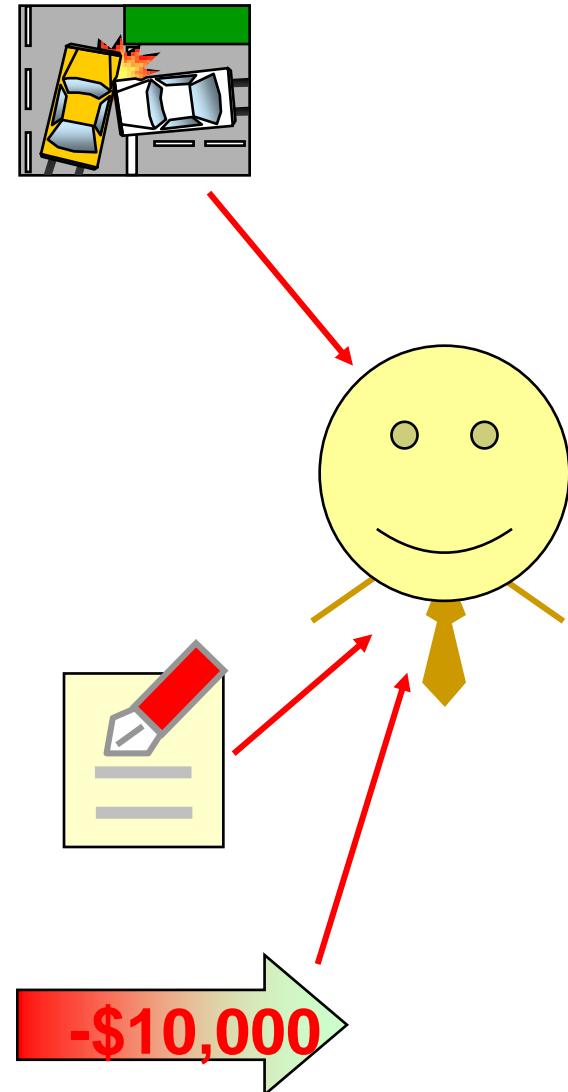
- ▶ Configuration option for ClaimCenter
  - When set to true, supervisors and managers can access any claim that a member of the group and its subgroups can access

# 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

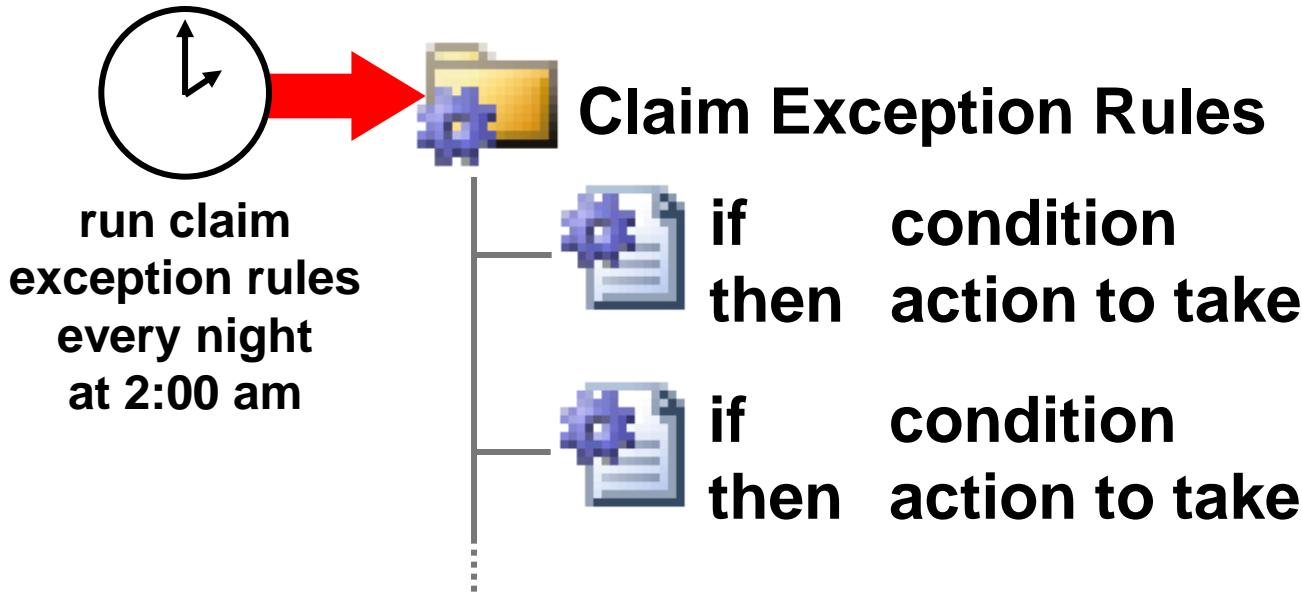


# Objects That Require Attention

	Cause	System Response	Supervisor Response
Claim	<ul style="list-style-type: none"><li>▶ Remainder of lesson discusses each object type, including:<ul style="list-style-type: none"><li>• What causes it to "need attention"?</li><li>• What does ClaimCenter do when it needs attention?</li><li>• What is the supervisor expected to do in response?</li></ul></li></ul>		
Activity			
Trans- action			

# What Causes a Claim To Need Attention?

batch process



- ▶ Claim exception rules check for claims that meet business criteria for "needing attention"
  - Batch process executes claim exception rules

# How Does ClaimCenter Respond?



## Claim Exception Rules

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

The screenshot displays two instances of the Guidewire ClaimCenter application. Both windows have a blue header bar with tabs: Desktop, Search, Team, Address Book, and Claim (000-00-000705). The main content area shows a summary of a claim with the following details:

**Top Window Summary:**  
Pol: 54-123456 | Ins: Ray Newton | DoL: 05/01/2008 | St: Open | Adj: Isabel Harkin (LA A)

**Bottom Window Summary:**  
Pol: 54-123456 | Ins: Ray Newton | DoL: 05/01/2008 | St: Open | Adj: Isabel Harkin (LA A)

**Left Sidebar (Shared by both windows):**

- Actions
- Summary (highlighted in blue)
- Workplan
- Loss Details

**Right Content Area (Bottom Window):**

- Actions** button
- Summary** tab (highlighted in blue)
  - Summary | Claim Status | Claim Health Metrics
- Basics** section
  - Open
  - 24 days (Target: 7)
  - Collided with other car.
- Financials** section
  - Gross Incurr

# Flag Information

The screenshot shows the Guidewire Claim Center interface for a claim with number 000-00-000108. A red arrow points from the top navigation bar to the flag icon in the header. Another red arrow points from the flag icon to the tooltip "Overdue urgent priority activity: Make initial contact with insured". A large red bracket on the right side groups the "Flag Details" section and its corresponding tooltip.

**Claim Status**  
Summary | Claim Status | Claim Health Metrics  
Edit Remove Flag

**General Status**

Loss Type	Auto
Line of Business	Auto
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Incident Only?	No

Claim Status: Open

**High-Risk Indicators**

Litigation
Litigation Status
Litigation Identified
Days after FNOL
First Notice Suit
Next Trial Date

**Flag Details**

Flagged  
Date Flagged: 09/25/2009  
Reason for Flag: Overdue urgent priority activity: Make initial contact with insured

Currently flagged  
09/25/2009  
Overdue urgent priority activity: Make initial contact with insured

**Storage**

Date Shipped to Storage  
Storage Location State

SIU Score: 1  
Referred to SIU team? No

**Flag Details**

Flagged  
Date Flagged: 09/25/2009  
Reason for Flag: Overdue urgent priority activity: Make initial contact with insured

# How Does the Supervisor Respond?

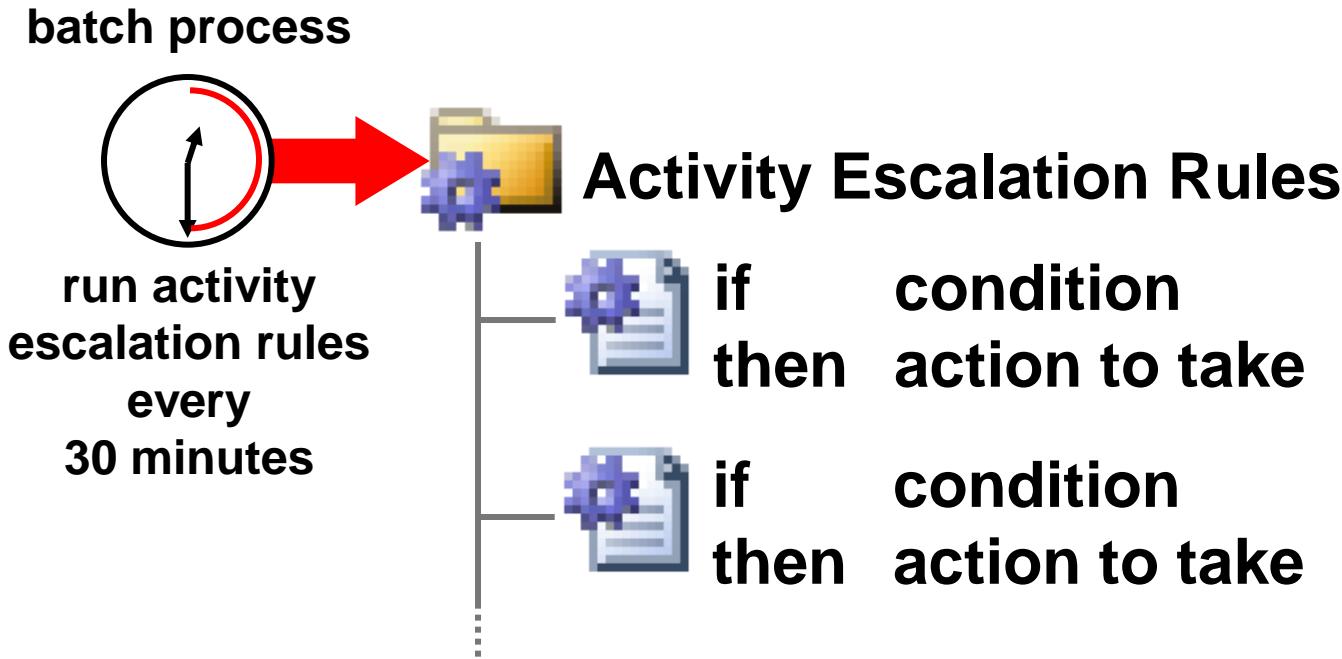
LA Auto Adjusters: Claims (1 - 10 of 10)						
<a href="#">Summary</a>   <a href="#">Aging</a>   <b>Claims</b>   <a href="#">Exposures</a>   <a href="#">Activities</a>   <a href="#">Matters</a>						
All open owned				<a href="#">Assign</a>	<a href="#">Remove Flag</a>	<a href="#">Print/Export</a>
<input type="checkbox"/>		<a href="#">Claim</a> ▲	<a href="#">Adjuster</a>	<a href="#">Policy</a>	<a href="#">Insured</a>	<a href="#">Claimant</a>
<input checked="" type="checkbox"/>		<a href="#">000-00-000304</a>	Gwenn Kennedy	56-475868	<a href="#">Brittany Turner</a>	Brittany Turner, Marcus Sato
<input type="checkbox"/>		<a href="#">000-00-000508</a>	Terence Johnson	54-847564	<a href="#">Larry Gamney</a>	
<input type="checkbox"/>		<a href="#">000-00-000103</a>	Pending Assignment	54-586734	<a href="#">Robert Farley</a>	Angel Ramirez, Robert Farley

- ▶ Supervisor should:
  - Attend to the issue as appropriate, and then
  - Remove flag

# Claims That Require Attention

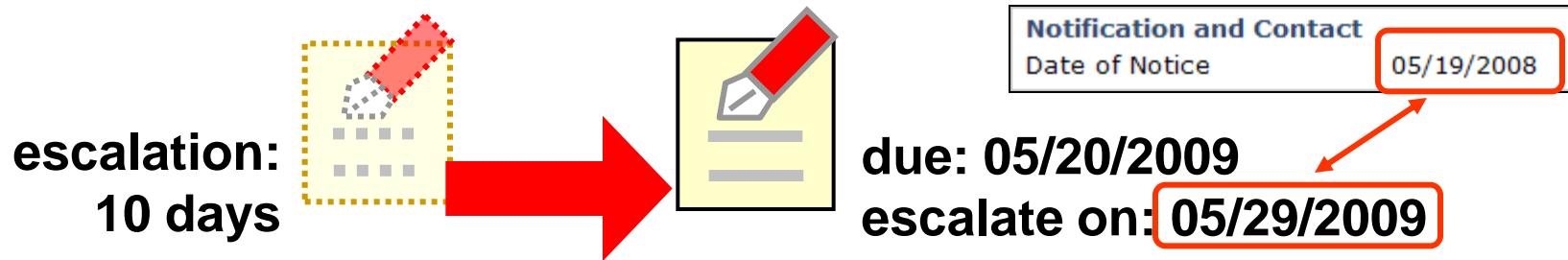
	Cause	System Response	Supervisor Response
Claim	- Exception rules set claim to flagged	- Flag icon displayed in info bar and list views	- Attend to the issue, THEN - Remove claim flag
Activity			
Trans- action			

# What Causes an Activity To Need Attention?



- ▶ Activity escalation rules check for activities that are open passed the activity's escalation date
  - Batch process executes activity escalation rules

# Review: Setting Escalation Points



	<input type="checkbox"/>			<u>Due</u>	<u>Priority</u>	<u>Status</u>	<u>Subject</u> ▾
	<input type="checkbox"/>			05/20/2008	High	Open	<u>Verify coverage</u>

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

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

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

# How Does ClaimCenter Respond?



## Activity Escalation Rules

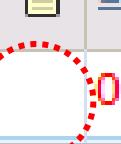


**(always) create activity to alert supervisor about activity**



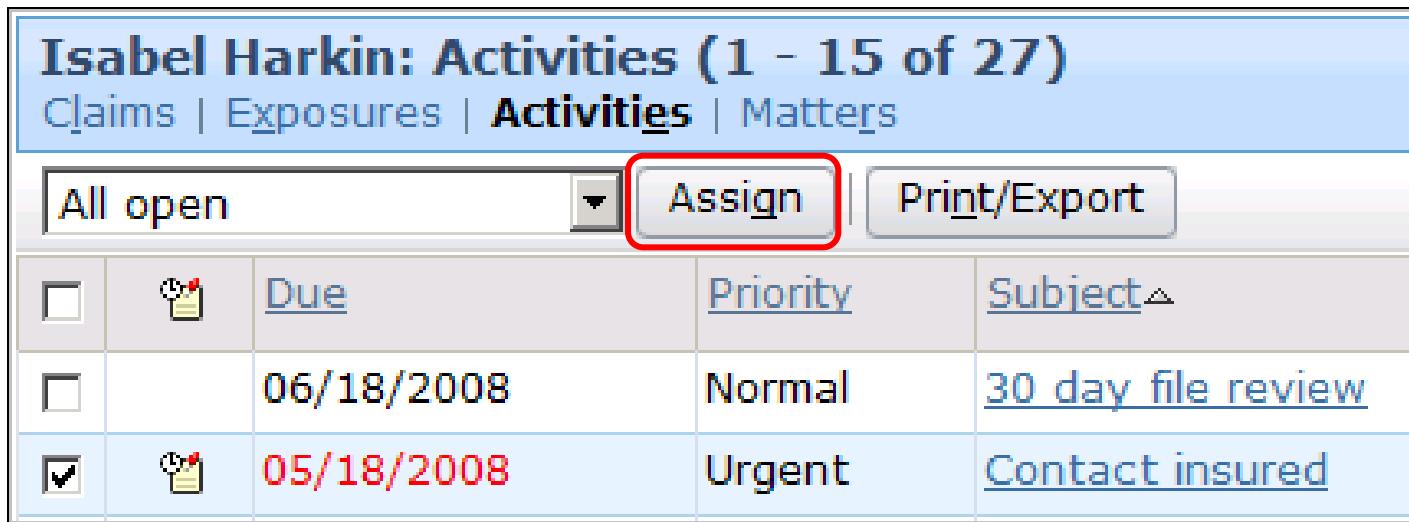
**if activity is Verify Coverage  
then set claim to flagged**

	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Due</a>	<a href="#">Priority</a>	<a href="#">Status</a>	<a href="#">Subject</a> ▼
	<input type="checkbox"/>			05/20/2008	High	Open	<a href="#">Verify coverage</a>



	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Due</a>	<a href="#">Priority</a>	<a href="#">Status</a>	<a href="#">Subject</a> ▼
	<input type="checkbox"/>			05/20/2008	High	Open	<a href="#">Verify coverage</a>

# How Does the Supervisor Respond?



The screenshot shows a software interface titled "Isabel Harkin: Activities (1 - 15 of 27)". Below the title are navigation links: Claims, Exposures, Activities (which is bolded), and Matters. A toolbar below the links includes a dropdown menu set to "All open", an "Assign" button (which is highlighted with a red box), and a "Print/Export" button. The main area displays a table of activities:

		Due	Priority	Subject
<input type="checkbox"/>		06/18/2008	Normal	<a href="#">30 day file review</a>
<input checked="" type="checkbox"/>		05/18/2008	Urgent	<a href="#">Contact insured</a>

- ▶ 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)
Transaction			

# Financials Approval



- ▶ ClaimCenter reviews every transaction to determine if it requires approval
  - Financials approval is discussed in the Financials Approval lesson

# 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

# 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.

# Reservation of Rights

**Copyright © 2009 Guidewire Software, Inc. All Rights Reserved.**

This file and the contents herein are the property of Guidewire Software, Inc. Use of this course material is restricted to students officially registered in this specific Guidewire-instructed course. Replication or distribution of this course material electronically or in paper format is prohibited without express permission from Guidewire.

Guidewire, Guidewire Software, Guidewire ClaimCenter, Guidewire PolicyCenter, Guidewire BillingCenter, Guidewire ContactCenter, Guidewire Insurance Suite, Guidewire Education, and the Guidewire logo are trademarks or registered trademarks of Guidewire Software, Inc. All other trademarks are the property of their respective owners.