The New Claim Wizard

25 February 2010

Lesson Objectives

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

- Identify the general features of the new claim wizard
- Initiate the new claim wizard
- Identify the differences between the full claim wizard and the quick claim wizard
- Identify what happens if you leave the new claim wizard while the claim is incomplete

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

- The New Claim Wizard
- Initiating the New Claim Wizard
- Full Claims
- Quick Claims
- Incomplete Claims

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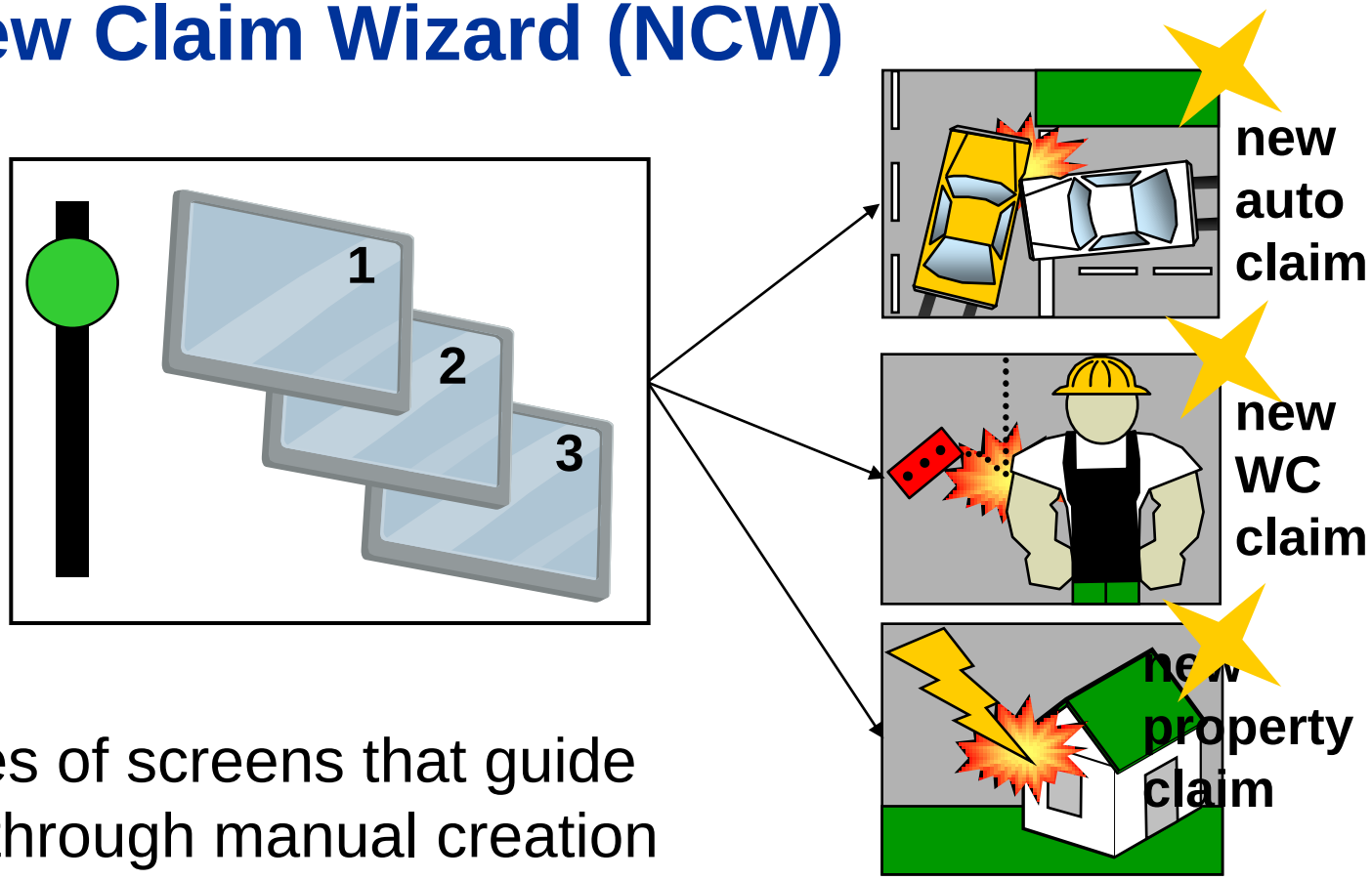
The New Claim Wizard (NCW)



- A series of screens that guide users through manual creation of new claims
  - Incorporates multiple lines of business
  - Screens and flow are completely configurable

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Variations Across Lines of Business

Step 3 of 5: Add claim information

Cancel | < Back | Next > | Finish

What Happened? City bus driver swerved to avoid hitting a pedestrian and rear-ended the insured

Date of Loss 03/24/2008 12:00 AM

Loss Cause * Collision with train or bus

Incident Only? ☐ Incident Only

Vehicles, People, & Property

Add Vehicle | Add Pedestrian | Add Property Damage

1996 Toyota Corolla

At the Scene

Witnesses | Add | Remove

* Name	* Statement Obtained	Where was witness?
Edna Kravitz	No	Pedestrian

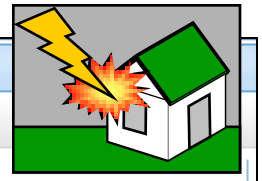
Categorization

Fault Rating: Other party at fault

Weather: Clear

Catastrophe: <none selected>

Special Claim Permission: <none selected>



Step 3 of 8: Add claim information

Cancel | < Back | Next > | Finish

Claim Policy

Policy Number 23-502011

Policy Status In force

General

Line of Business * Property

Loss Type Property

Catastrophe <none selected>

Special Claim Permission <none selected>

Description Improperly installed sprinkler leaked and damaged merchandise in storage and equipment

Loss Details

Loss Cause * Water damage

Fault Rating <none selected>

Date of Loss 03/24/2008 12:00 AM

Properties

Add | Remove

Address	City	State
2103 Veterans Pkwy.	Bloomington	Illinois

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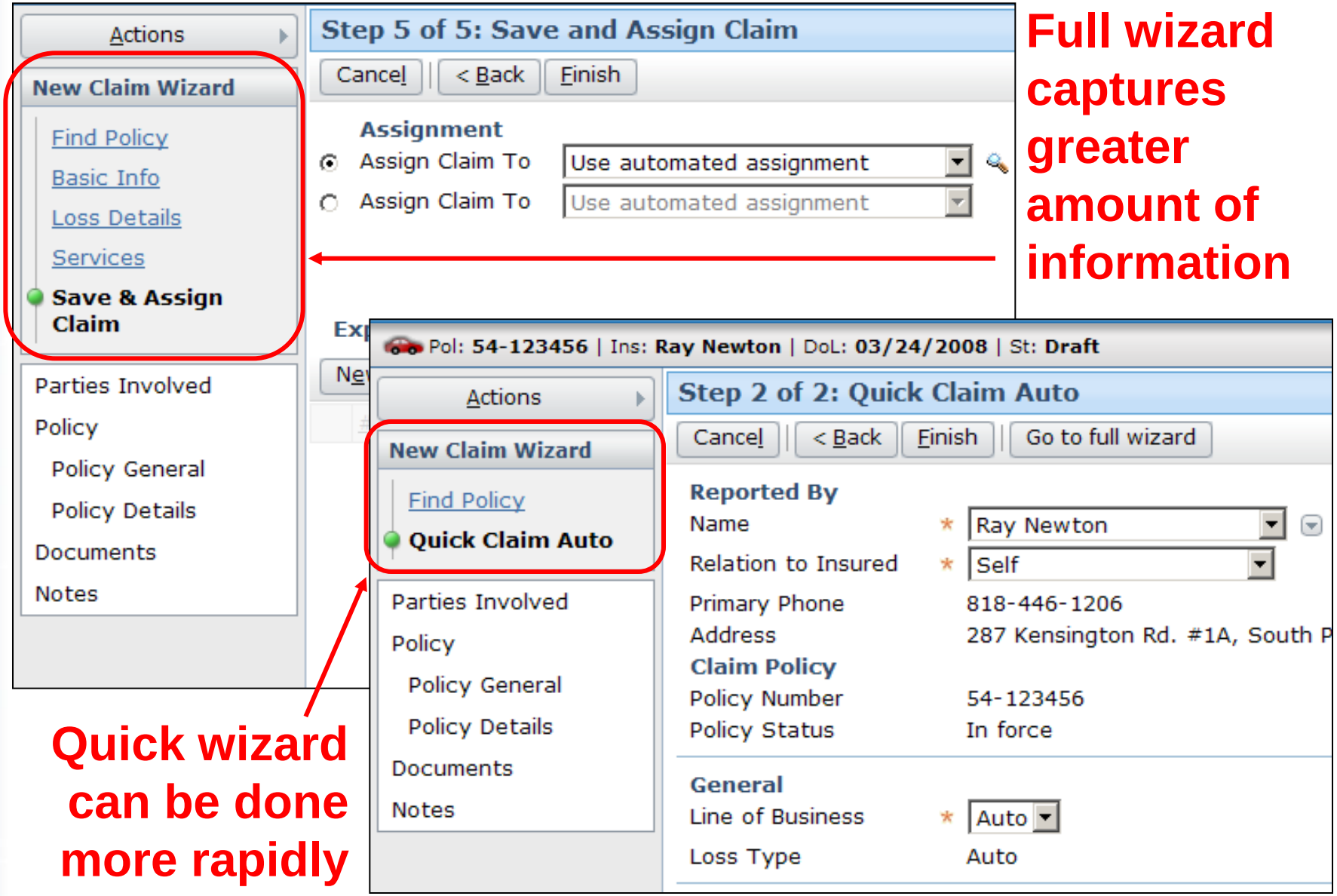
Two Levels of Depth



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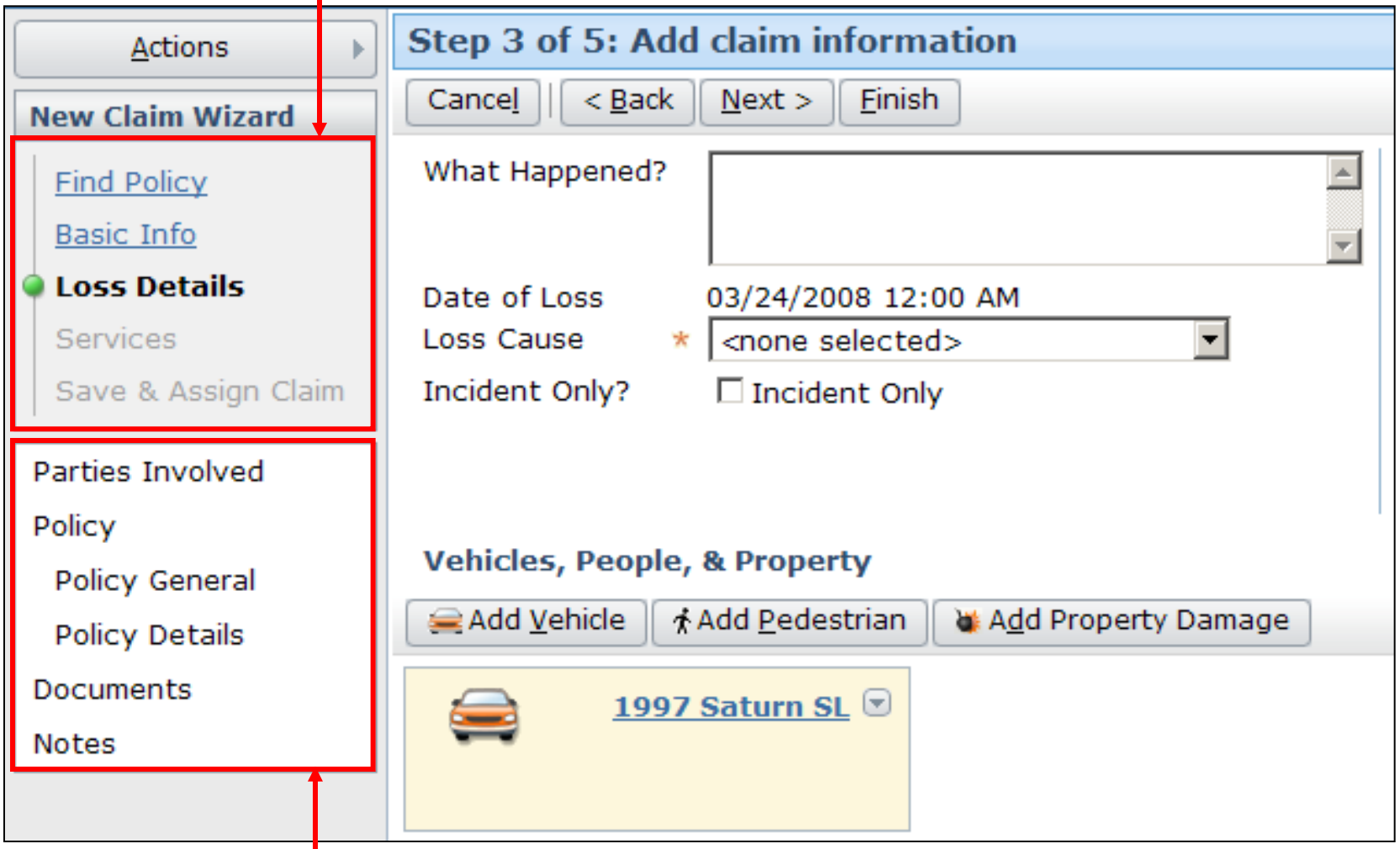
Two Sets of Wizard Steps

ordered



independent

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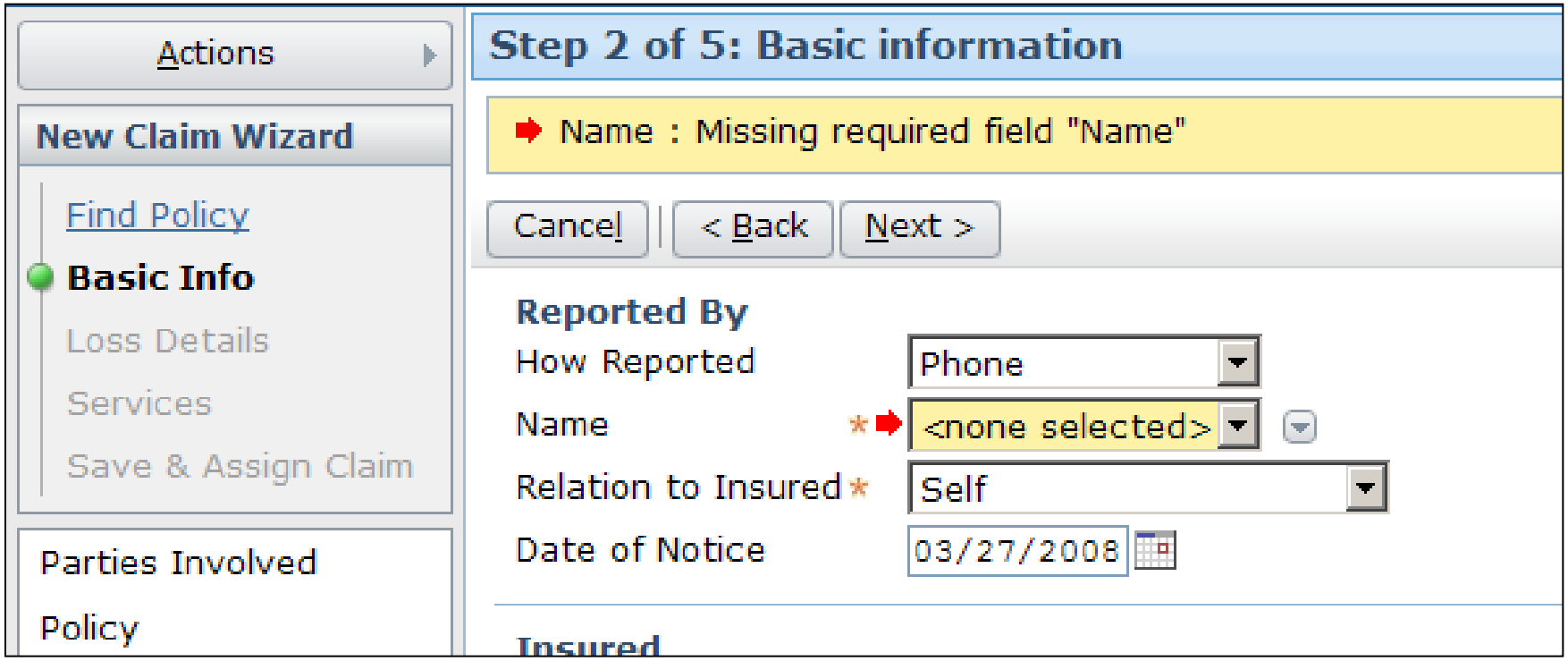
Step-By-Step Validation



- Wizard steps can execute validation logic to prevent users from moving from a given step if the data on that step is invalid

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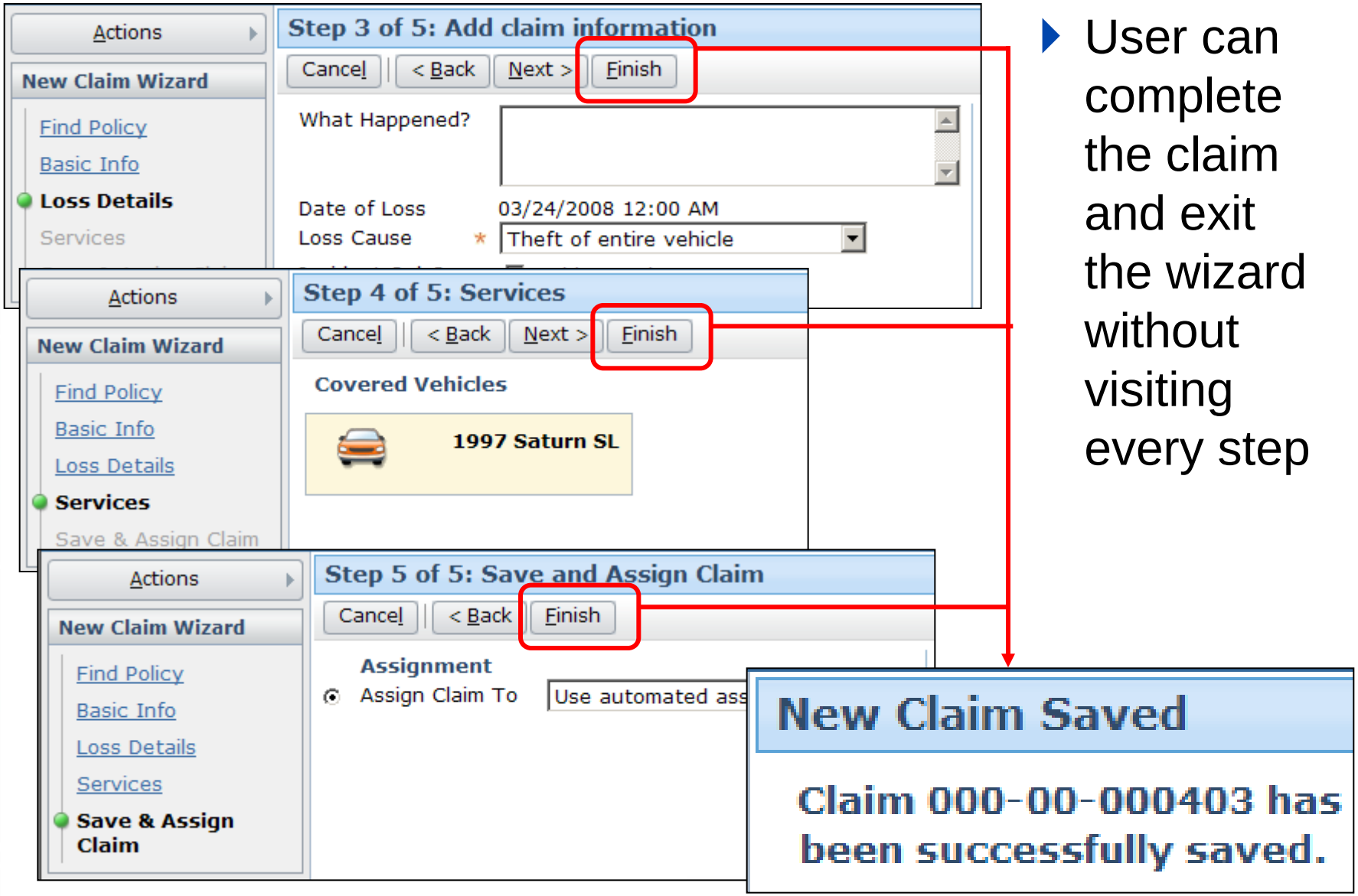
Completing the Wizard



- User can complete the claim and exit the wizard without visiting every step

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Lesson Outline

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- Full Claims
- Quick Claims
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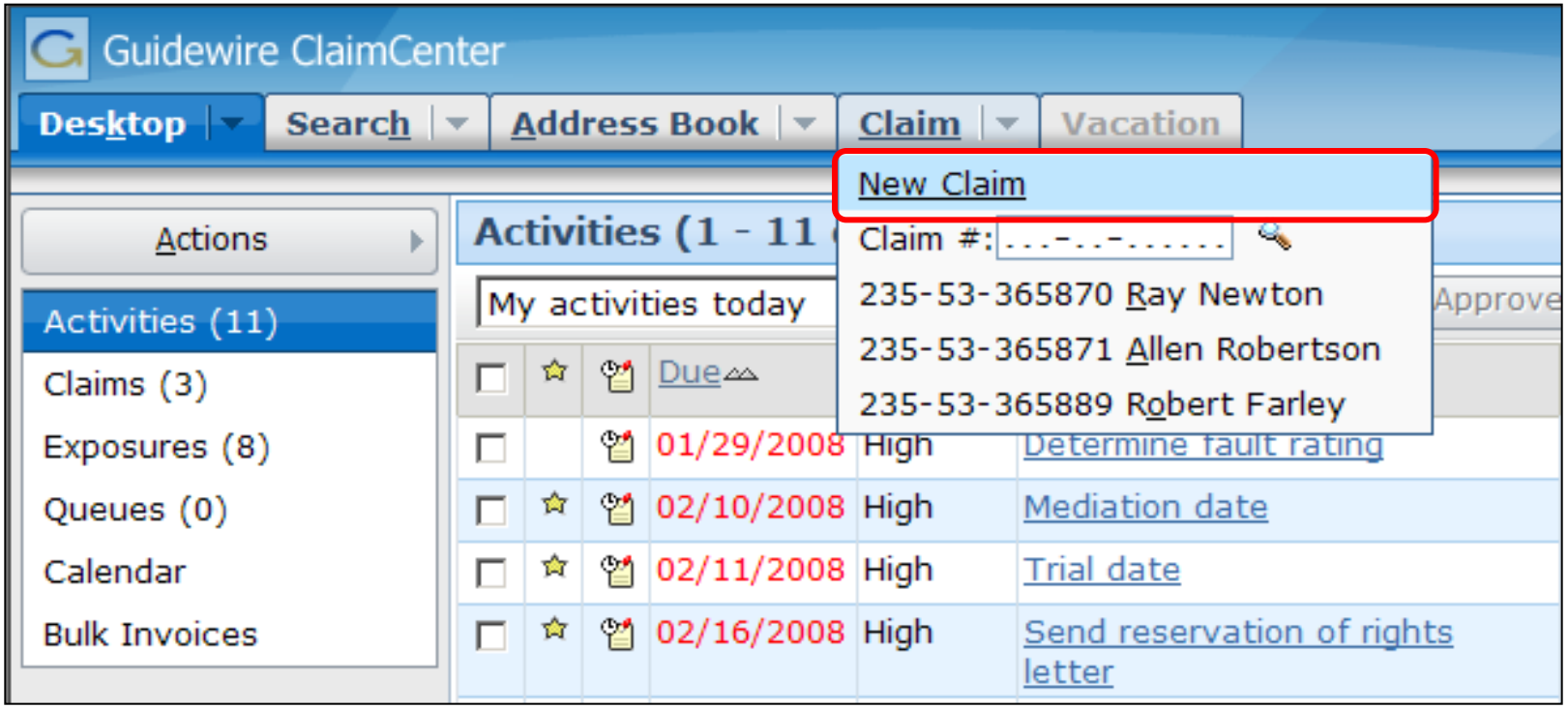
Initiating the New Claim Wizard



- Initiated through a widget
  - In the base application, a menu item in the Claim tab menu

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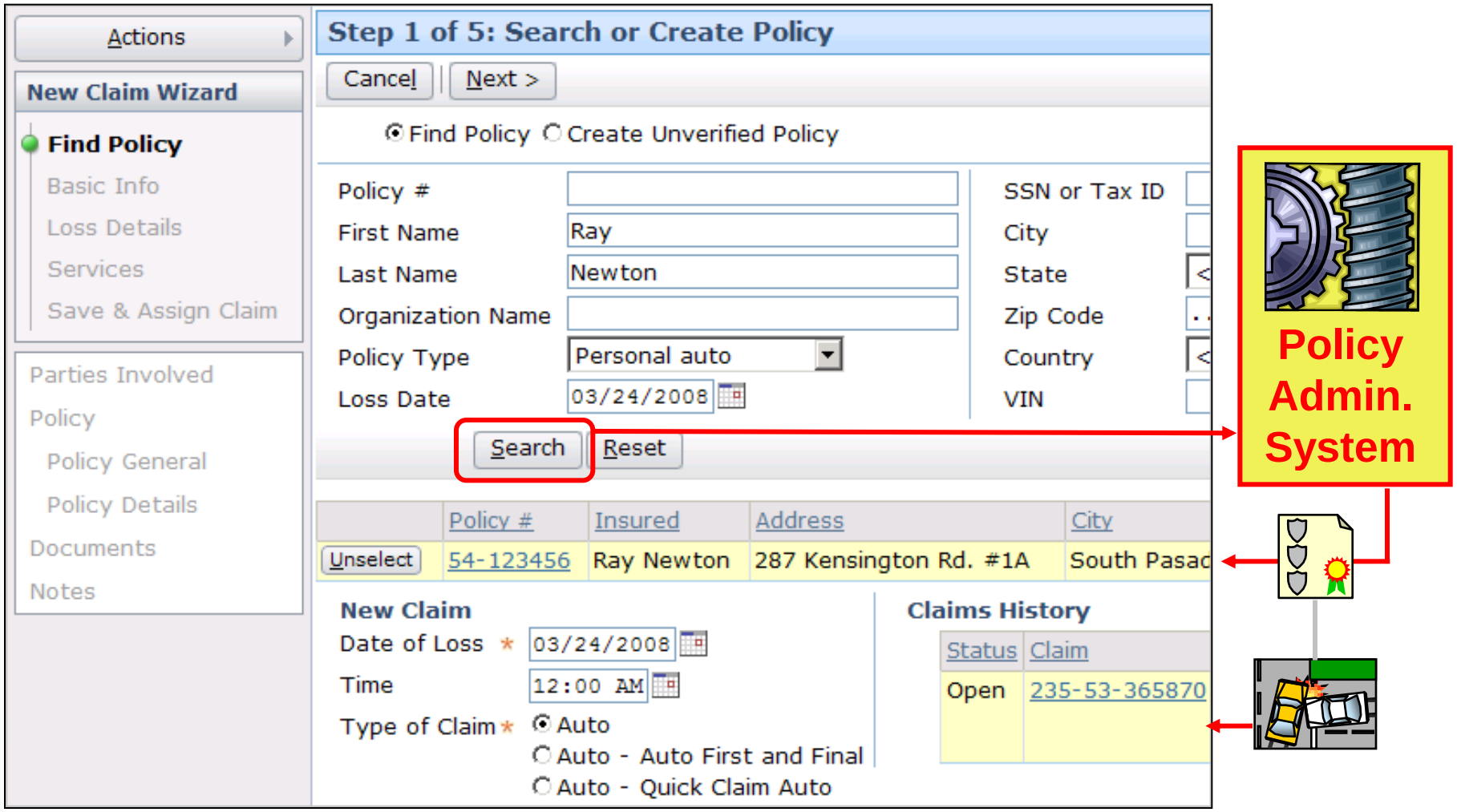
Identifying the Policy



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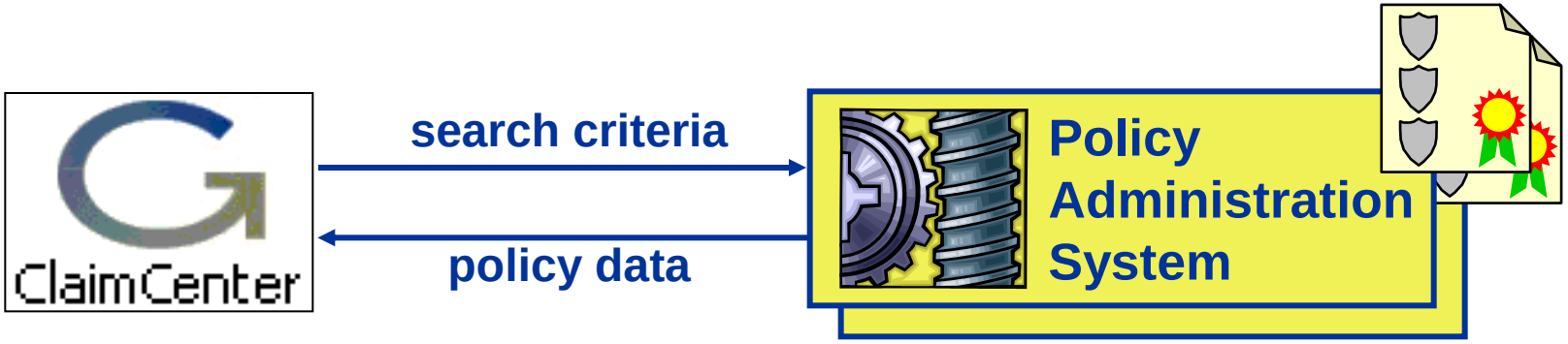
Policy Administration System Integration



- Every instance of ClaimCenter has an integration point to a policy administration system, such as PolicyCenter
  - This application stores information about:
    - Policies issued by the carrier
    - Coverages on each policy
    - People or assets covered by those coverages

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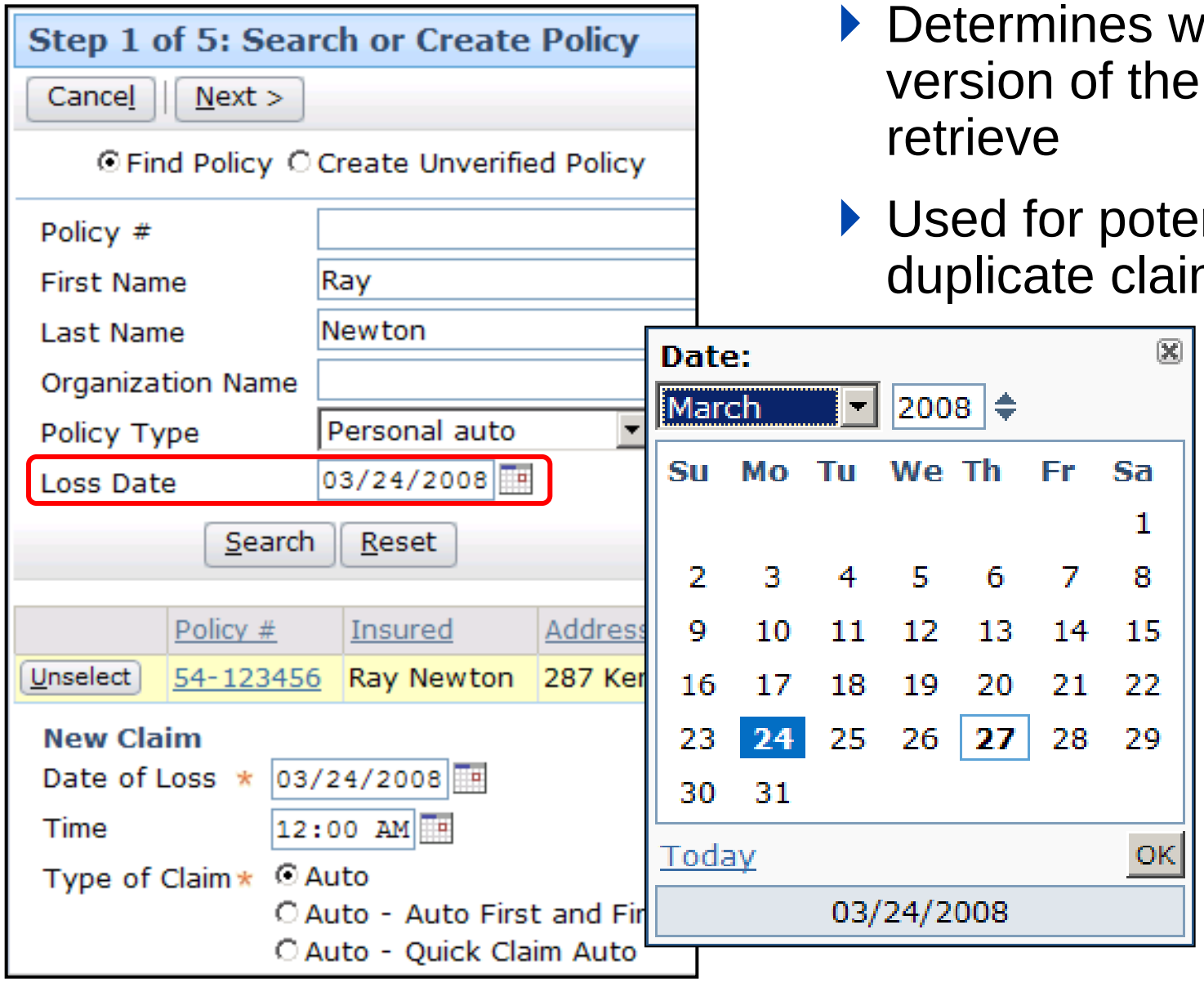
Identifying the Loss Date



- Determines which version of the policy to retrieve
- Used for potential duplicate claims search

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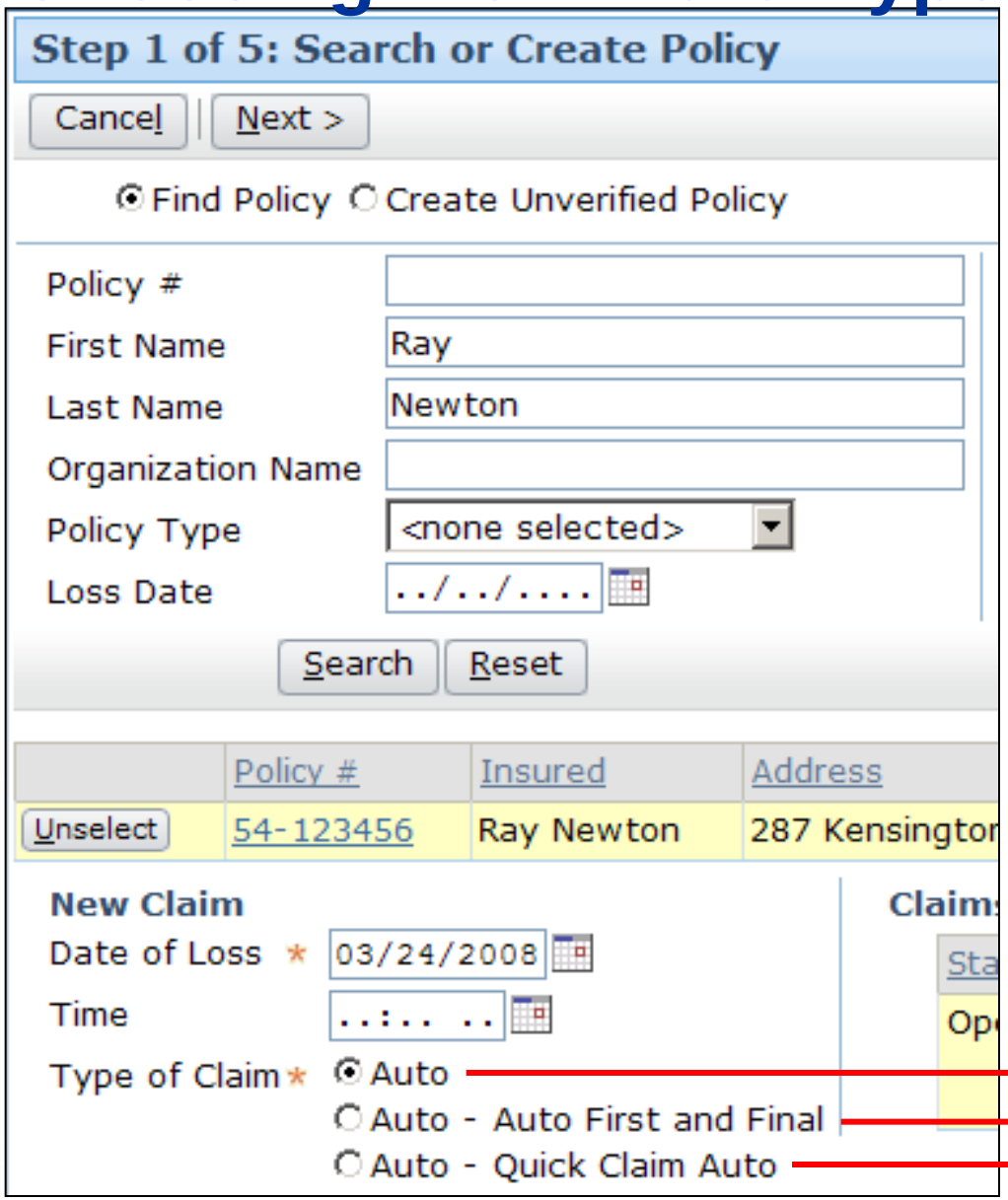
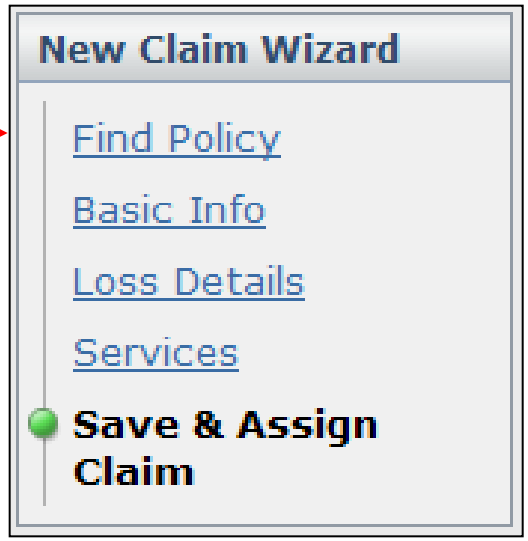
Choosing the Wizard Type





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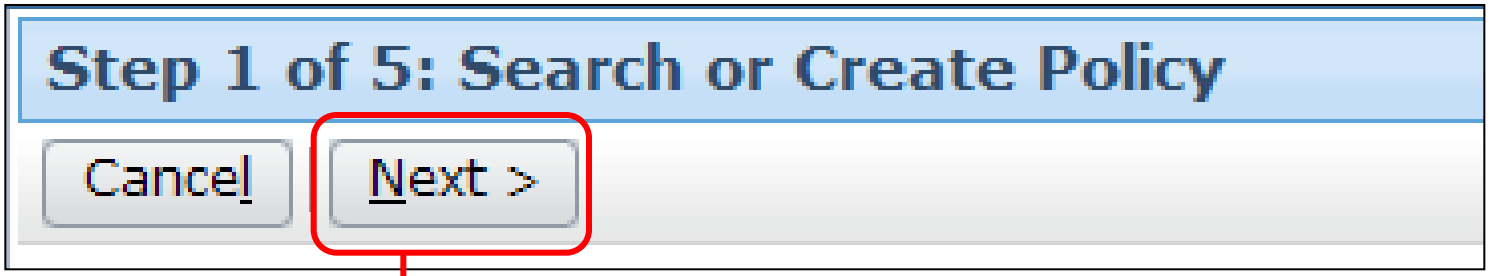
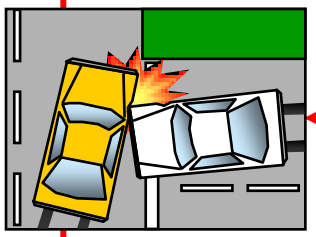
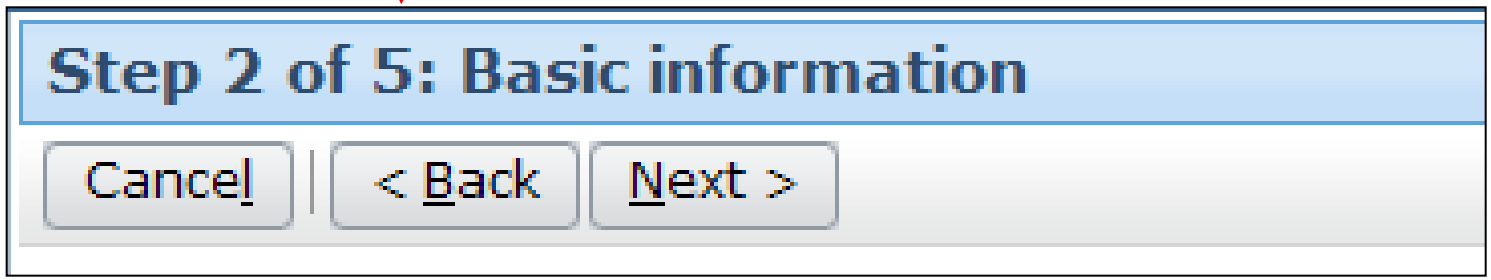
Temporary Claim Number Generation





999-99-991109 (temporary number)

- Generated after first step
- Used to track claim in draft status
- Typically not displayed



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Identifying Primary Contact and Involved Vehicle

Actions

New Claim Wizard

- Find Policy
- **Basic Info**
- Loss Details
- Services
- Save & Assign Claim

Parties Involved
Policy
- Policy General
- Policy Details

Documents
Notes

Step 2 of 5: Basic information

Cancel | ≤ Back | Next ≥

Reported By

How Reported: Phone
Name *: <none selected>
Relation to Insured *: <none selected>
Date of Notice: 09/18/2009

Insured

Name: Ray Newton
Address: 287 Kensington Rd. #1A, South Pasadena, CA 91145
Primary Phone: 818-446-1206

Main Contact

Same Person?
- (•) Same as reporter
- ( ) Different person

Involved Vehicle(s)

☑ **1996 Toyota Corolla (2GDH967 / California)**

Collision	500.00 usd Deductible; 10000.00 usd Limit
Comprehensive	500.00 usd Deductible; 5000.00 usd Limit
Liability - Auto bodily injury	75000.00 usd/150000.00 usd Limit
Liability - Property damage	75000.00 usd Limit
Medical payments	500.00 usd Limit

☐ **1997 Saturn SL (1HGJ465 / California)**

- Primary contact data captured immediately after initial wizard information is known (in case conversation is interrupted)
- Involved vehicle data captured as first incident on claim

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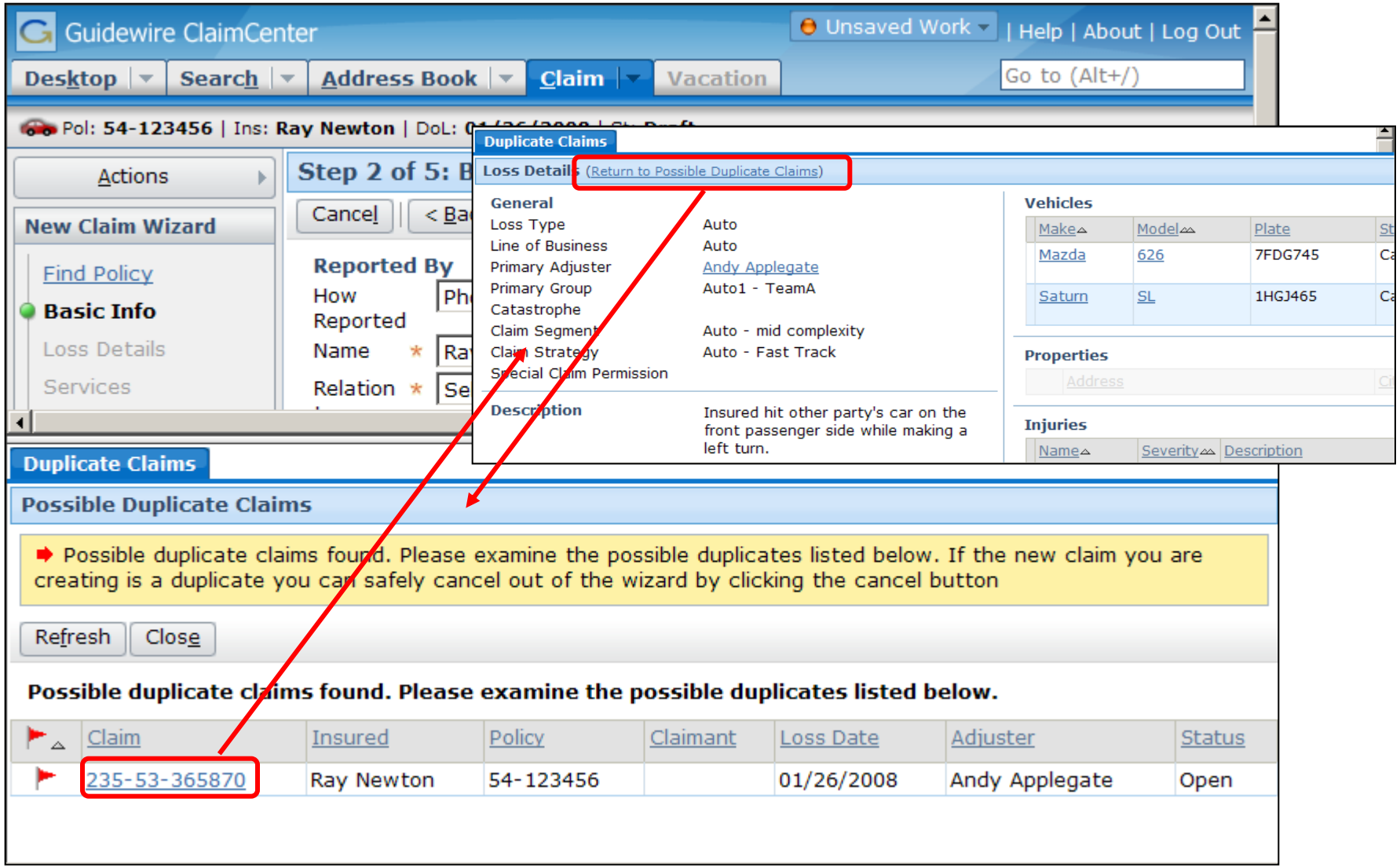
The Possible Duplicate Claims Warning



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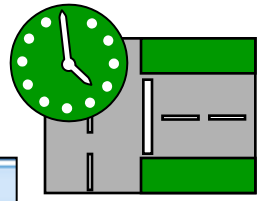
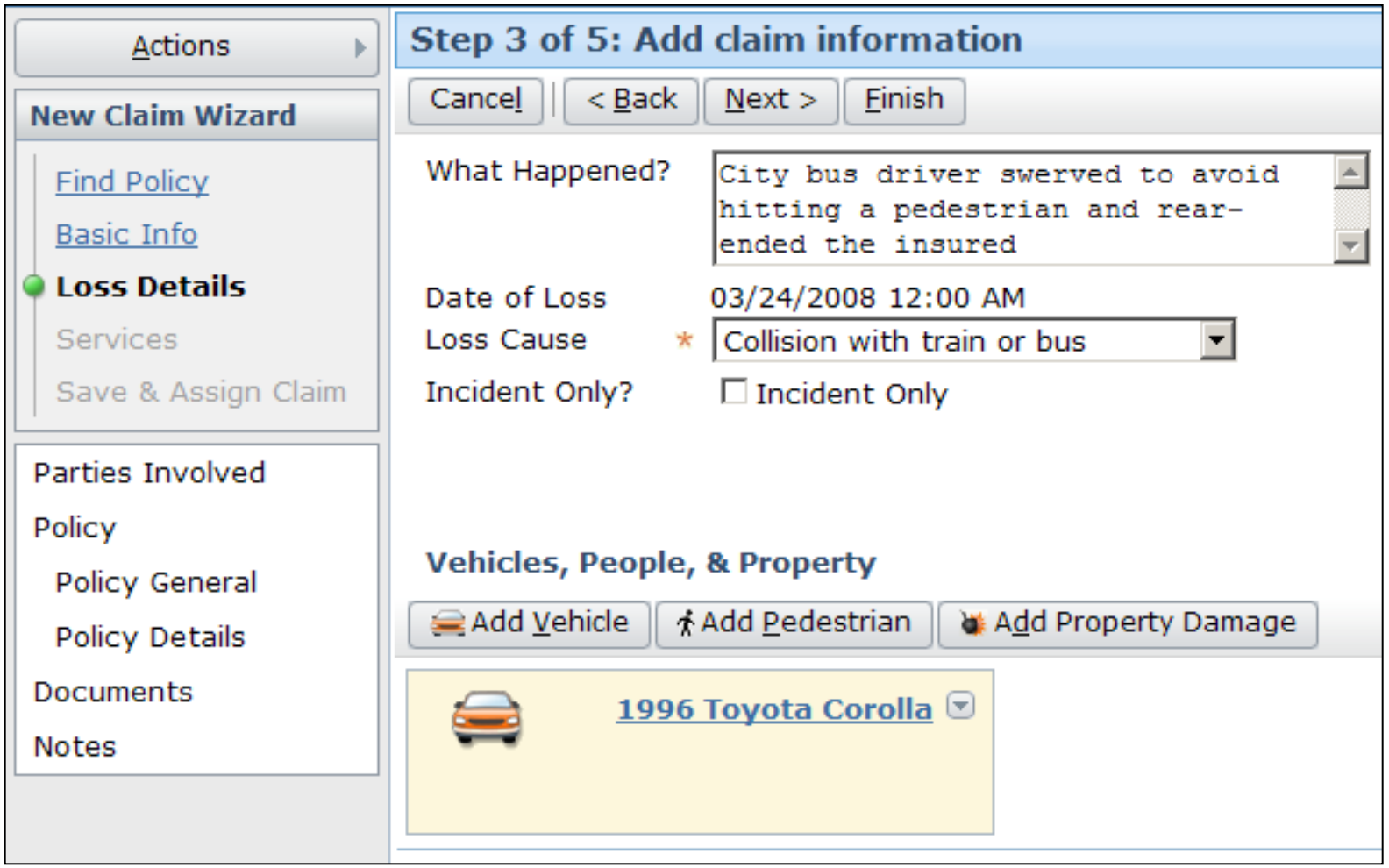
Identifying Details About the Loss Event





- Captures information about loss occurrence and incidents (lost or damaged items)

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Identifying Details About the Incidents

Vehicles, People, & Property

Add Vehicle | Add Pedestrian | Add Property Damage

1996 Toyota Corolla

Vehicle Details (Return to Step 3 of 5: Add claim information)

OK | Cancel

Vehicle Basics

Loss Party: (•) Insured ( ) Third Party

Select vehicle: * 1996 Toyota Corolla (2GDH

Was the vehicle stolen? ( ) Yes ( ) No

Was the vehicle parked? ( ) Yes ( ) No

Damage

Damage Description: Rear bumper is crumpled. Windshield and headlights were shattered.

Possible Total Loss? ( ) Yes ( ) No Calculate

Total Loss Points

Operable? ( ) Yes ( ) No

Airbags Deployed? ( ) Yes ( ) No

Equipment Failure? ( ) Yes ( ) No

Occupants and Injuries

Add Passenger | Remove

	Name/Position	Injuries
☐	Ray Newton driver	Windshield shattered and glass shard made 1-inch cut on insured's right arm

Service Needed

- ☐ Rental
- ☐ Towing
- ☐ Appraisal
- ☐ Autobody Repair Shop

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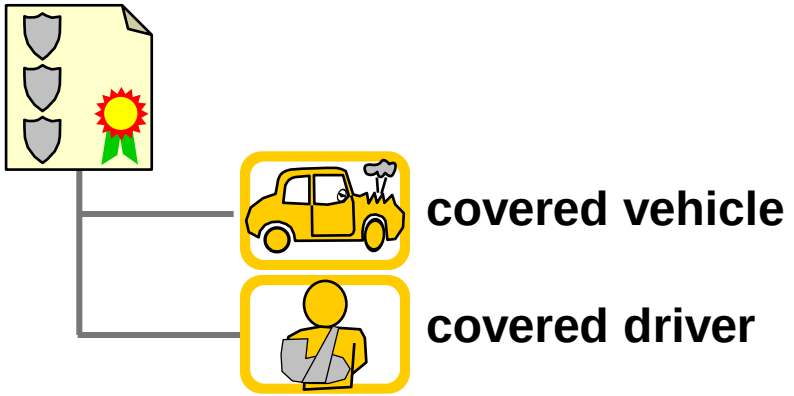
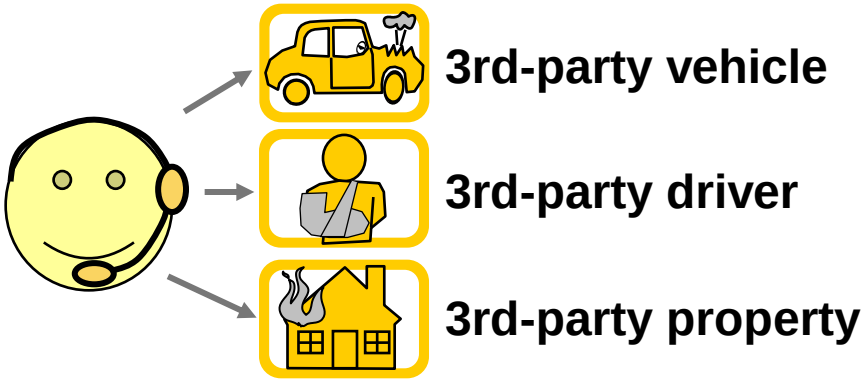
Where Can Incident Information Come From?

- From the policy administration system



- From the user creating the claim



- From the adjuster during discovery/investigation

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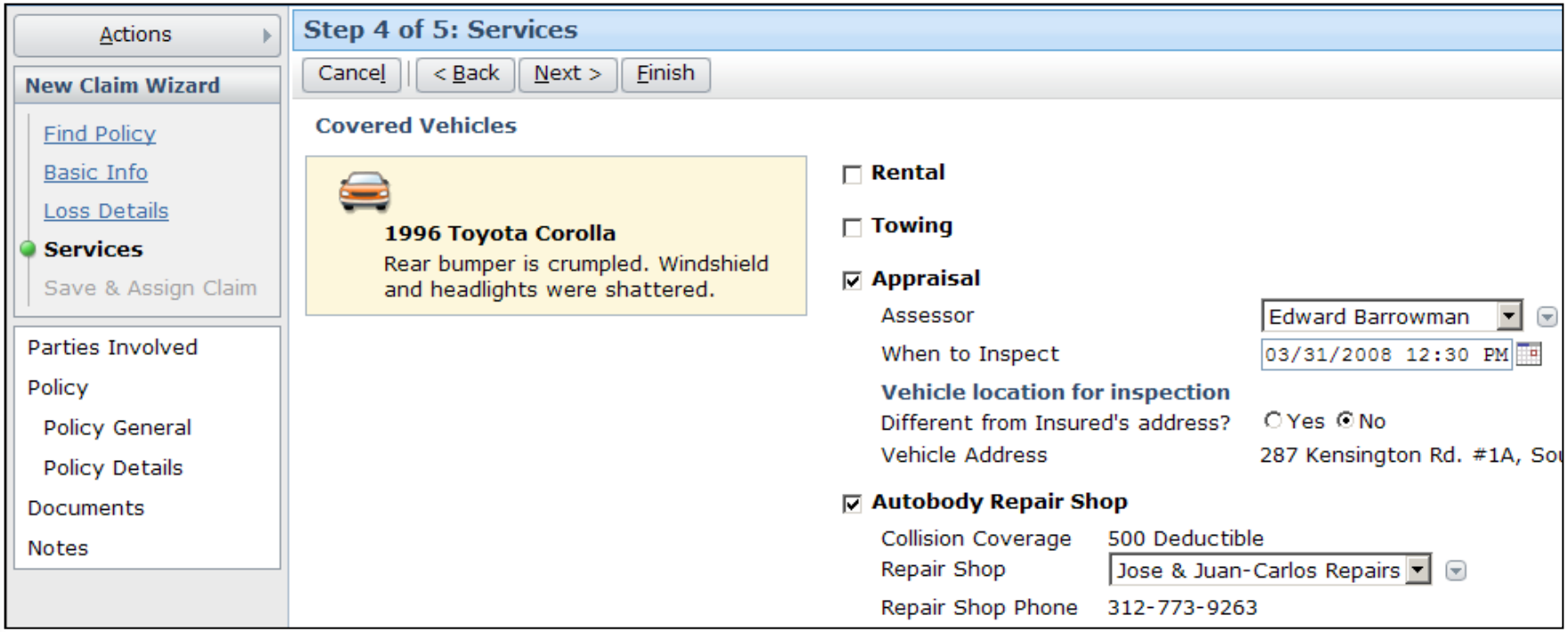
Services



- Services step helps improve customer relationships by:
  - Offering or capturing information about additional needs the insured may have
  - Controlling damage
  - Saving money

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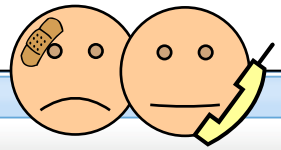
Independent Steps

- Parties Involved
- Policy
  - Policy General
  - Policy Details
- Documents
- Notes



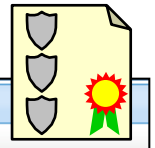
Parties Involved

< Back

Add any additional parties involved with this claim and their role in the claim below.

All | New Contact | Add Existing Contact... | Delete

Name	Roles	Contact Prohibited?	Phone
Jose & Juan-Carlos Repairs	Repair Shop	No	312-773-9263
Edward Barrowman	Primary As		
Karen Egertson	Agent		
Brian Newton	Excluded Par		
Ray Newton	Insured, Mai Contact, Rep Driver, Injure		
Stan Newton	Covered Par		



Policy Details

< Back | Edit Entire Policy

Review the details of this policy

Vehicles (1 - 2 of 2)

Remove

#	Make	Model	Year	VIN
1	Saturn	SL	1997	1GV234TV347463345
2	Toyota	Corolla	1996	3DGF78575GD892534

Endorsements (1 - 3 of 3)

#	Description
PP 03 03	Towing and Labor Costs Coverage

Documents

< Back

Review the documents for this claim.

Name	Actions
RTD Contact In	

Notes

Edit Print

Author Andy Applegate

Topic Coverage

Related To none (Claim-level)

Mar 27, 2008 12:42 PM

Question about rental coverage

Insured thought the policy automatically included a rental reimbursement, but the policy as returned from the policy system shows no rental coverage.

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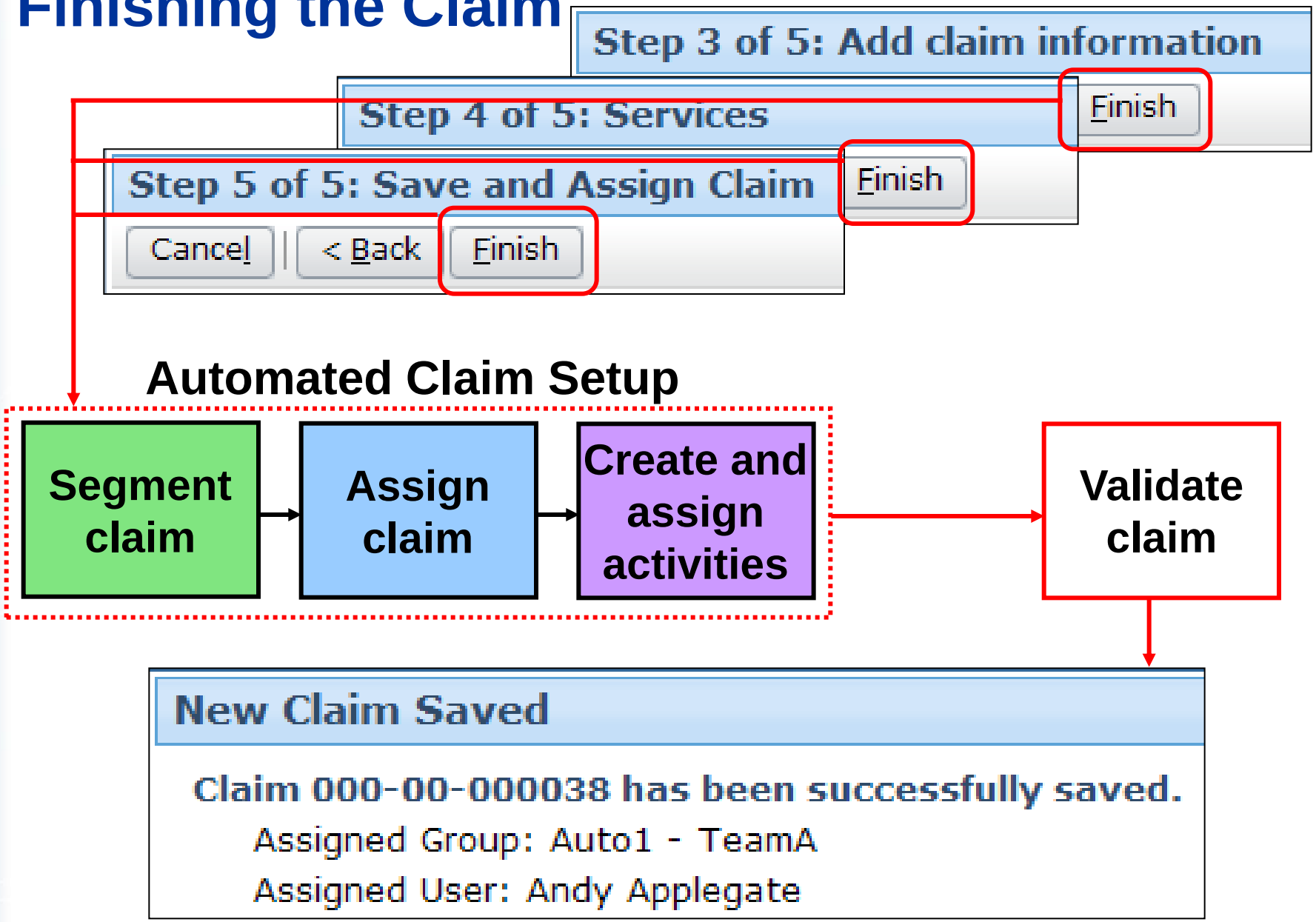
Finishing the Claim



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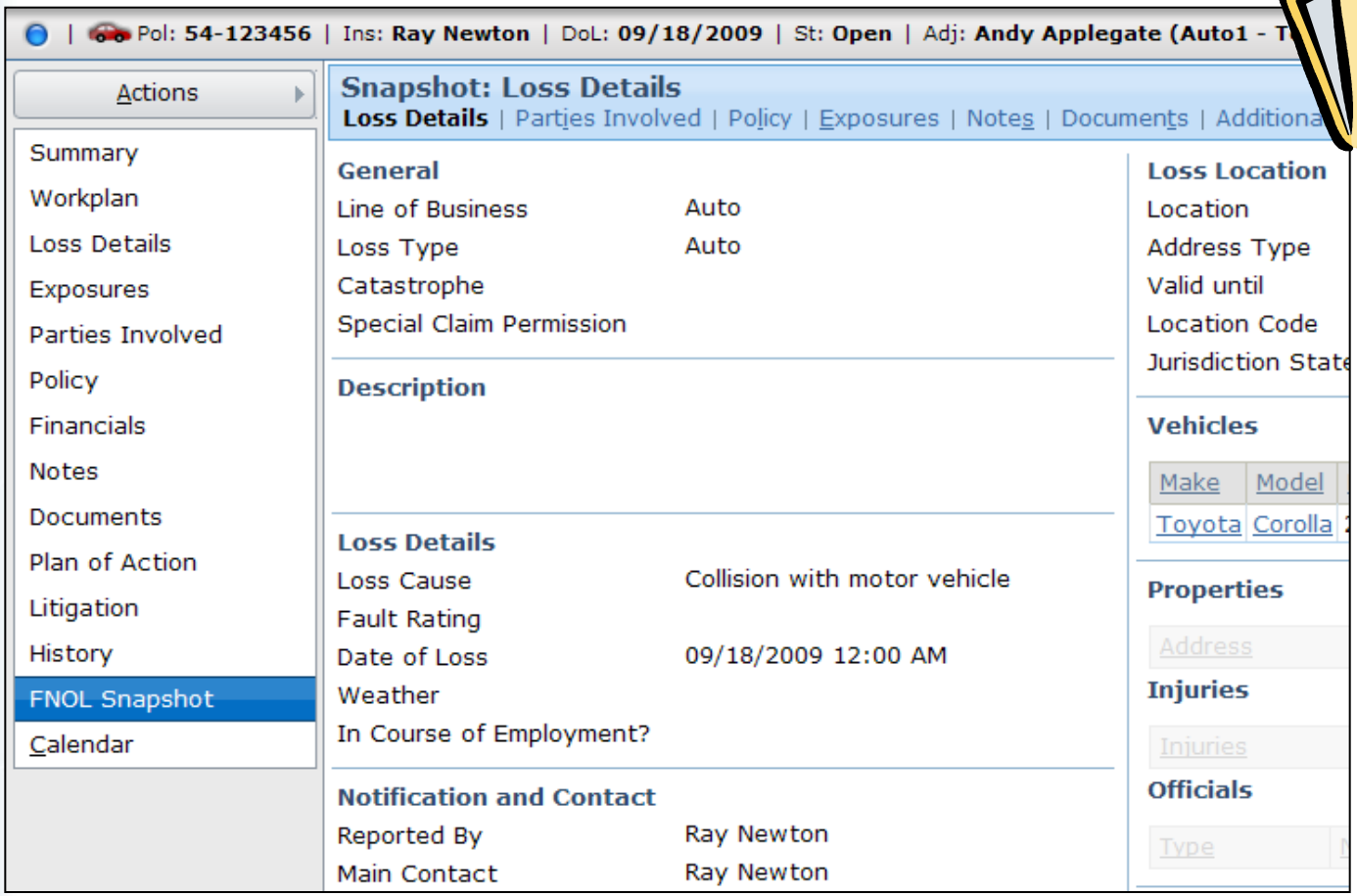
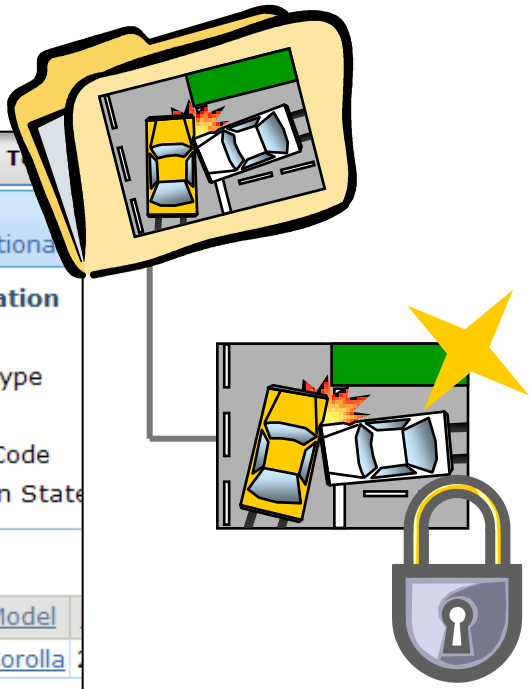
FNOL Snapshot





- A read-only view of data reported during intake which is added to the claim file once new claim is complete
  - Useful during adjudication to verify what was reported during first notice

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- Initiating the New Claim Wizard
- Full Claims
- Quick Claims
- Incomplete Claims

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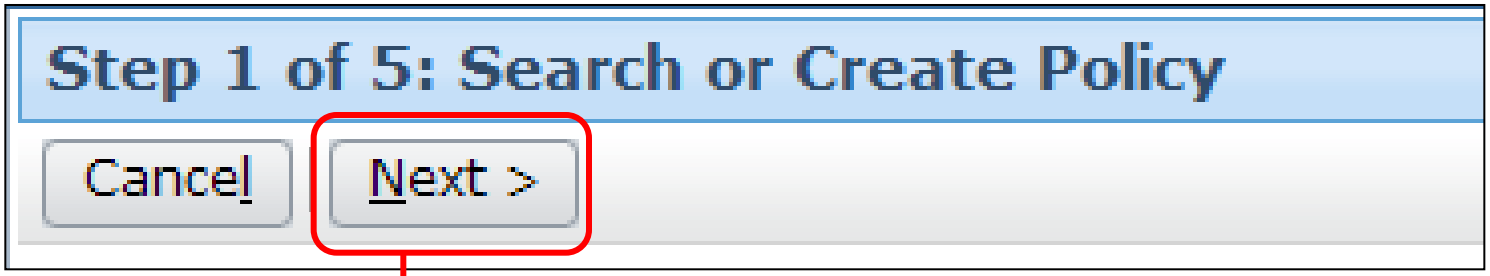
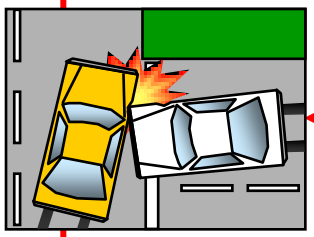
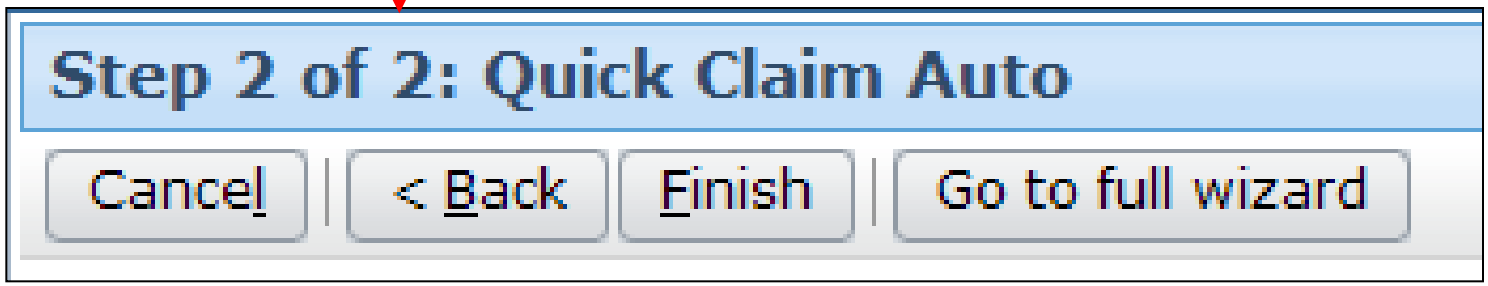
Temporary Claim Number Generation





999-99-991109 (temporary number)

- Like full wizard claims, generated for quick wizard claims after the first step



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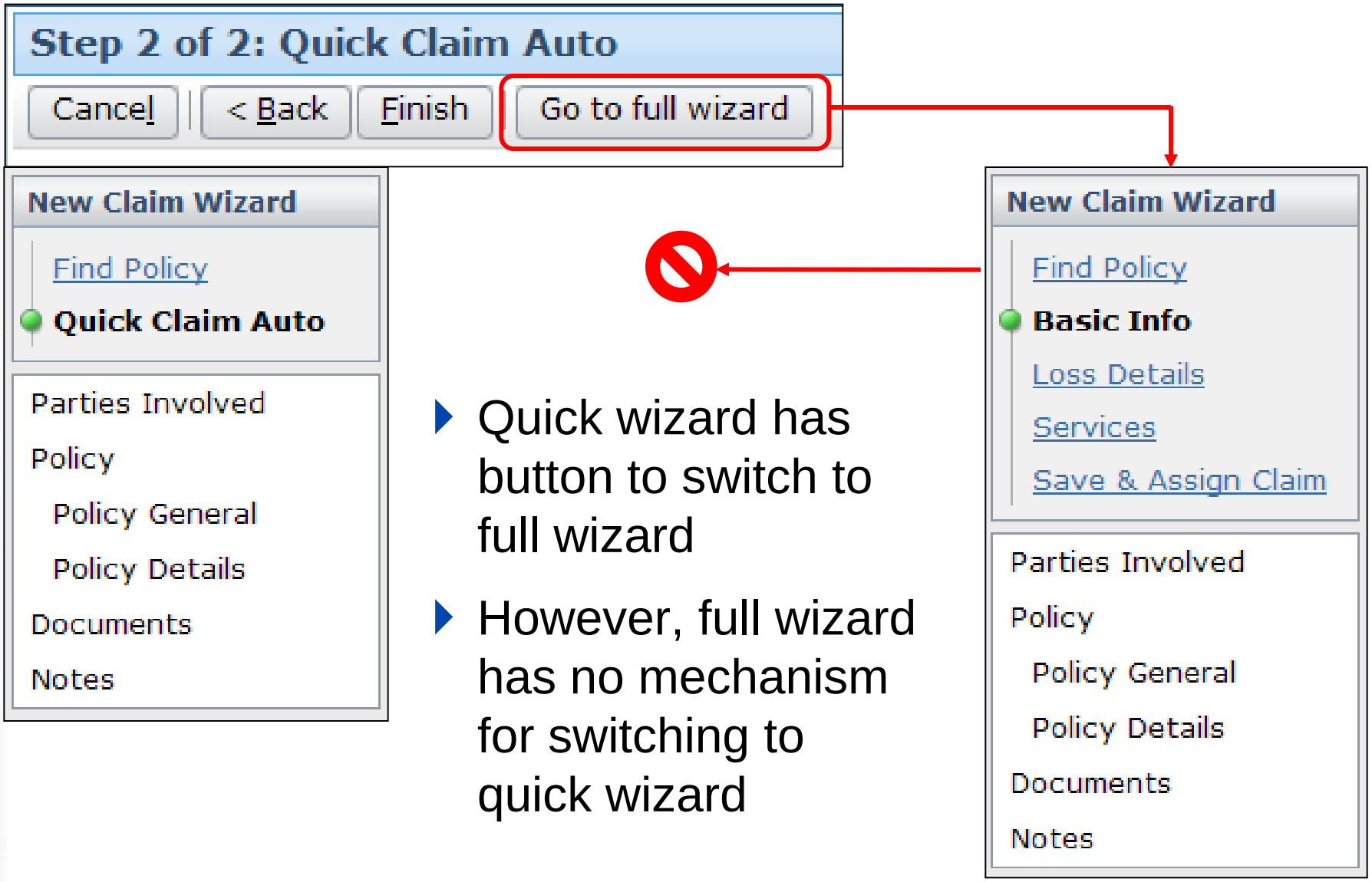
Moving Between Wizards



- Quick wizard has button to switch to full wizard
- However, full wizard has no mechanism for switching to quick wizard

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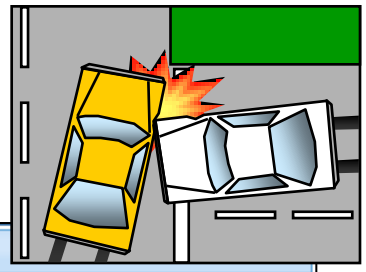
Quick Claim Wizard Example: Auto



Step 2 of 2: Quick Claim Auto

Cancel | < Back | Finish | Go to full wizard

Reported By

Name * <none selected>

Relation to Insured * <none selected>

Primary Phone

Address

Claim Policy

Policy Number 54-123456

Policy Status In force

General

Line of Business * Auto

Loss Type Auto

Description

Loss Details

Loss Cause * <none selected>

Fault Rating <none selected>

Date of Loss 02/28/2008 12:00 AM

Date of Notice * 03/27/2008

Incident Only? * Yes No

Coverage in Question? Yes No

Location

Location New...

Address 1

Address 2

City *

County

State * <none selected>

Zip Code .....-....

Country United States of America

Location Code

Jurisdiction State <none selected>

Vehicles

Add | Remove

Make | Model | Plate | State | Loss Party | Driver

Claim Assignment

Assign claim and all exposures to: Use automated assignment

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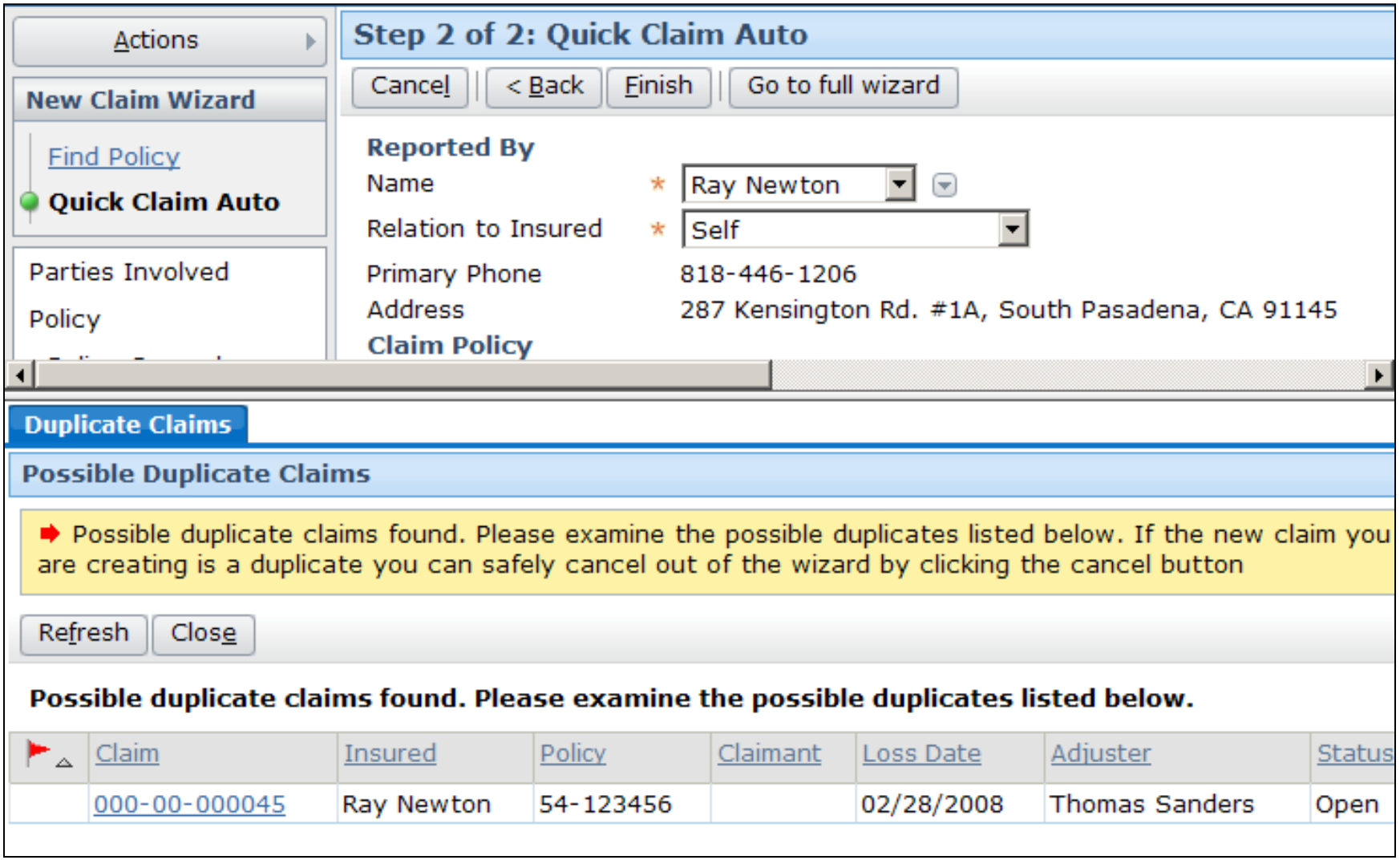
Quick Claim Duplicate Warning



- For quick wizard, check is executed at end of wizard

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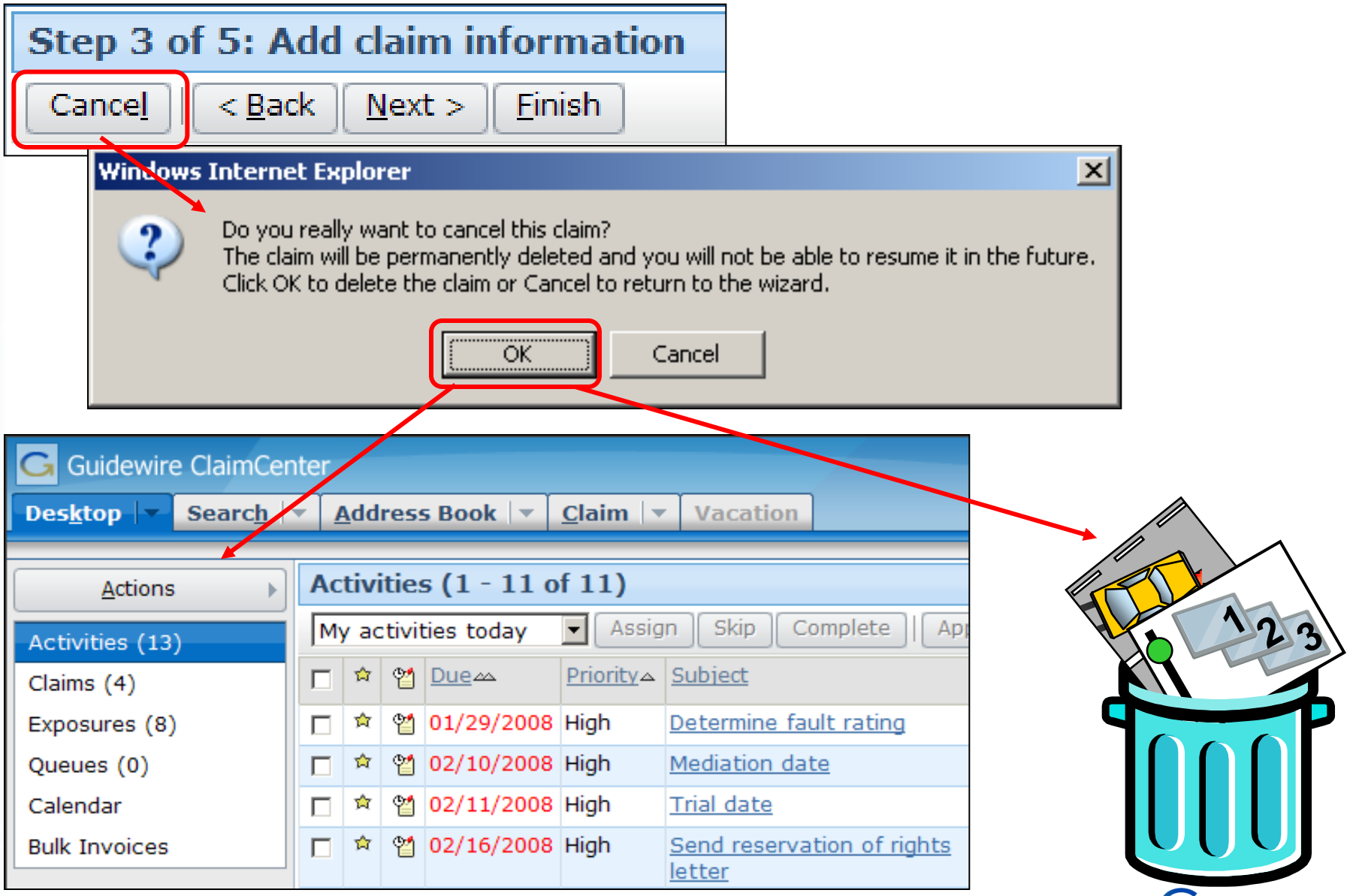
Cancelling a New Claim



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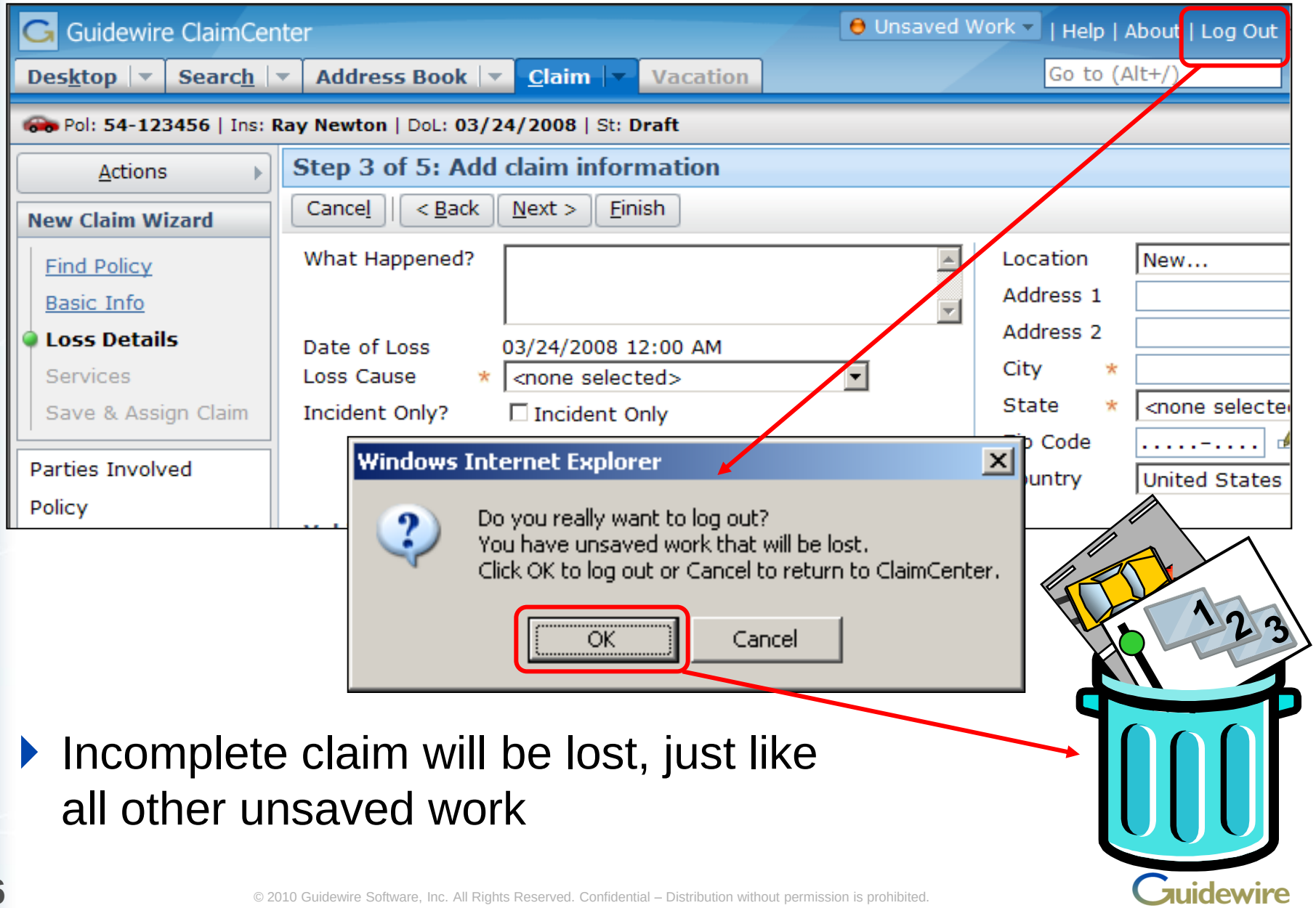
Logging Out During a New Claim



- Incomplete claim will be lost, just like all other unsaved work

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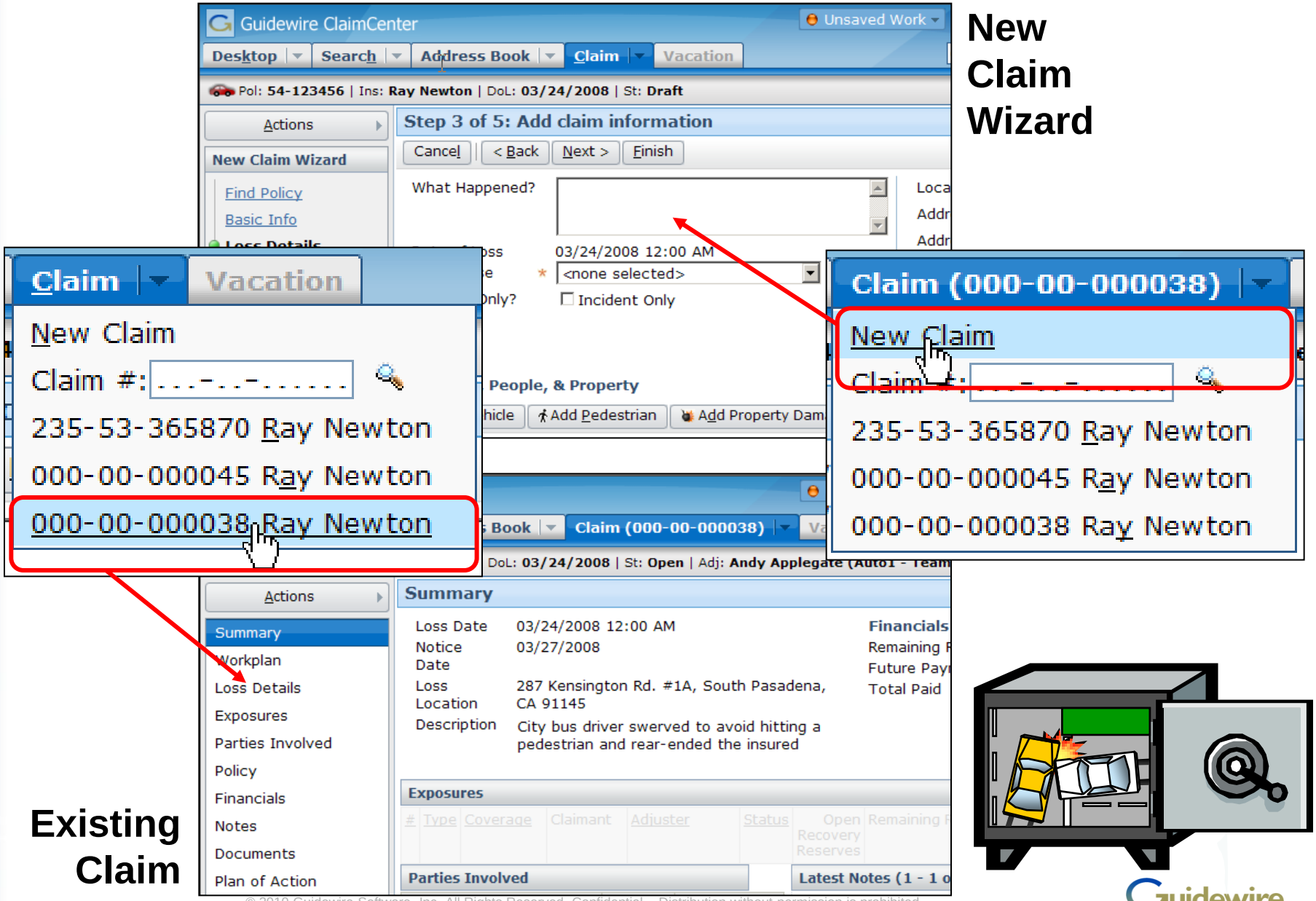
Navigating Away from a New Claim



New Claim Wizard

Existing Claim

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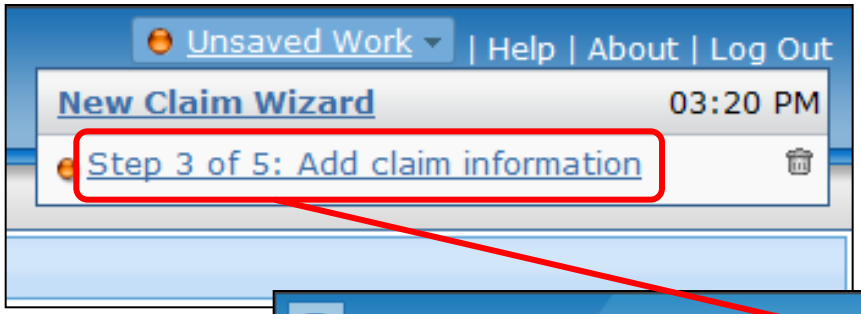
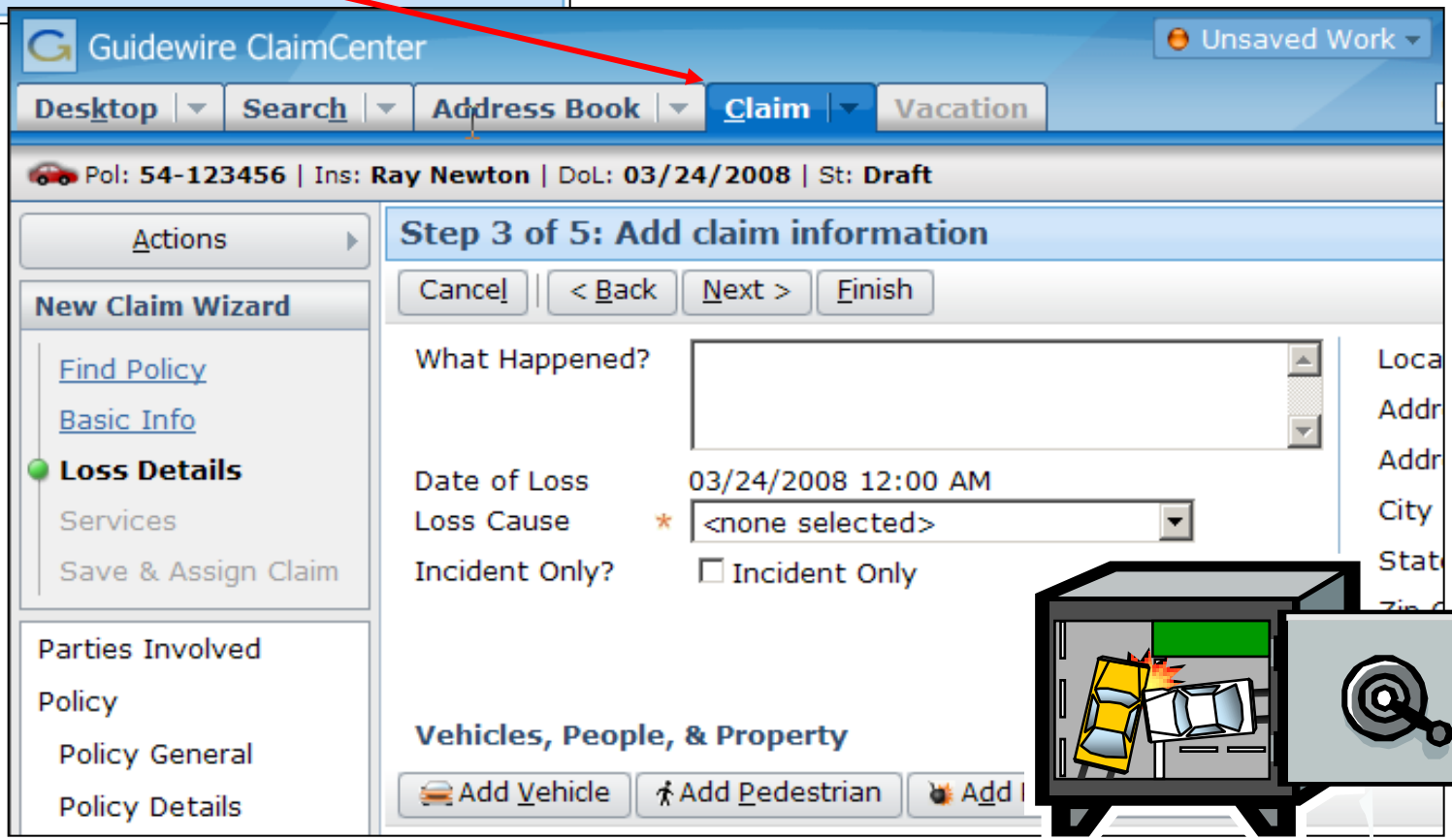
New Claims in the Unsaved Work Menu



- New claims are always listed in the Unsaved Work menu



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Interrupted New Claims

Guidewire ClaimCenter

Desktop | Search | Address Book | Claim | Vacation

Claims
Activities
Checks
Recoveries
Bulk Invoices

Search Claims
Simple Search | Advanced Search

Claim # ...-..-.....
Policy # 54-123456
Search For: Claimant
First Name:

Search | Reset

Search Results (1 - 4 of 4)

Assign | Print/Export

Claim	Insured	Policy	Claimant	Adjuster	Status
235-53-365870	Ray Newton	54-123456	Bo Simpson, Ray Newton	Andy Applegate	Open
999-99-999950	Ray Newton	54-123456			Draft

Guidewire ClaimCenter

Desktop | Search | Address Book | Claim | Vacation

Pol: 54-123456 | Ins: **Ray Newton** | DoL: **03/24/2008** | St: **Draft**

Actions

New Claim Wizard
Find Policy
Basic Info
Loss Details
Services
Save & Assign Claim

Parties Involved
Policy
Policy General

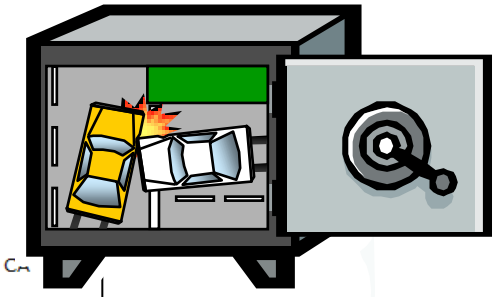
Step 2 of 5: Basic information

Cancel | < Back | Next >

Reported By
How Reported: Phone
Name *: Ray Newton
Relation to Insured *: Self
Date of Notice: 03/27/2008

Verify Date of Birth
Date of Birth

Confirm Contact Info
Address: 287 Kensington Rd. #1A, South Pasadena, CA
Business Phone: 818-446-1206 x....



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Lesson Objectives

You should now be able to:

- Identify the general features of the new claim wizard
- Initiate the new claim wizard
- Identify the differences between the full claim wizard and the quick claim wizard
- Identify what happens if you leave the new claim wizard while the claim is incomplete

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Review Questions

1. Identify if the following are true or false:
   a) If you do not provide required information on a given step, you cannot move to the next step.
   b) You can complete the new claim wizard without navigating to the final step in the wizard.
   c) You cannot create a claim if the system detects possible duplicate claims.
   d) Once you have started the full claim wizard, you can still switch over to the quick claim wizard.
   e) If you leave the new claim wizard without clicking Finish, the new claim is discarded.
2. What does ClaimCenter do after the user clicks the Finish button but before it displays the "claim successfully saved" screen?

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