



ClaimCenter 10 Introduction: Essentials

Student Workbook

Labs and Tutorials

Table of Contents

Introduction	4
Instructions for Self-Study	4
Login Credentials	4
Open navigation pane	5
Lesson 1 Defining Financial Terms and Concepts.....	6
1.1 Lab: Investigation - financials	6
1.2 Solution: Investigation – financials	7
Lesson 2 Creating Payments	9
2.1 Lab: Create a claim	9
2.2 Solution: Create a claim	10
2.3 Lab: Create exposures and reserves	11
2.4 Solution: Create exposures and reserves.....	12
2.5 Lab: Create payments.....	15
2.6 Solution: Create payments.....	16
Lesson 3 Constraining Payments – Approvals.....	18
3.1 Lab: Investigation	18
3.2 Solution: Investigation.....	18
3.3 Lab: Creating transactions.....	19
3.4 Solution: Creating transactions	20
Lesson 4 Constraining Payments – Financial Holds	23
4.1 Lab: Unverified policy	23
4.2 Solution: Unverified policy	24
4.3 Lab: Coverage in Question	25
4.4 Solution: Coverage in Question.....	26
Lesson 5 Managing Contacts	28
5.1 Lab: Adding contacts to a claim.....	28
5.2 Solution: Adding contacts to a claim.....	28
5.3 Lab: Contacts review	29
5.4 Solution: Contacts review	30
Lesson 6 Managing Vendors	31
6.1 Lab: Creating a vendor in ClaimCenter.....	31
6.2 Solution: Creating a vendor in ClaimCenter	32

Lesson 7 Managing Service Requests33

7.1 Lab: Creating and managing service requests..... 33

7.2 Solution: Creating and managing service requests..... 35

Lesson 8 Permissions and Access Control Lists37

8.1 Lab: Managing permissions and roles..... 37

8.2 Lab: Access Control Lists 39

8.3 Solution: Access Control Lists..... 40

Introduction

Instructions for Self-Study

You should have access to a Guidewire virtual machine (VM) to complete this course. Contact Guidewire Education (edadmin@guidewire.com) if you do not have access to a Guidewire VM.

After gaining access to a VM, follow these steps to start the ClaimCenter application.

1. **Locate the ClaimCenter Shortcuts folder on the Desktop**
2. **Open the ClaimCenter Shortcuts folder.**
3. **From the file list, double-click the Start ClaimCenter shortcut.**

This will open a command prompt window. Several messages related to ClaimCenter's startup appear in the window. When the steps are finished, you will see the following message in the command prompt window.

```
*****ClaimCenter ready*****
```

4. **It is easy to miss the "ready" message since ClaimCenter continues processing activities after displaying the notice.**

If you have waited three minutes or more and have not seen the message, go to step 6 and open Chrome. The percentage will remain at 0% but disregard the message.

5. **Leave the command window open (minimize it if needed).**
6. **Open Chrome from the bottom bar of the VM.**
7. **In the browser, connect to the following URL:**

```
http://localhost:8080/cc/ClaimCenter.do
```

8. **When you are finished training for the day, stop the application server.**

To stop the server, double-click the Stop ClaimCenter shortcut in the folder ClaimCenter Shortcuts on the Desktop. This will open a command prompt window to shutdown ClaimCenter.

9. **When you shut down ClaimCenter, both command prompt windows will close.**

Login Credentials



Important!

How do you log in?

To keep each student's work separate in the single instance of the running application, please be sure to use your assigned user name **studentXX** (WHERE XX SHOULD BE REPLACED BY A NUMBER ASSIGNED TO YOU BY THE INSTRUCTOR) with password **gw**. Ask your instructor for more information if needed.

DOING SELF-STUDY? INSTEAD OF STUDENTXX, PLEASE USE STUDENT01 FOR THE LABS, SINCE YOU ARE WORKING IN YOUR OWN VM.

Open navigation pane



Tip

Open navigation pane in a PDF file

If you do not see the left navigation pane, you can turn it on. In a PDF file, click the bookmark icon on the left. Or click the Adobe Acrobat menu item View → Show/Hide → Navigation Panes → Bookmarks.

Lesson 1

Defining Financial Terms and Concepts

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

1.1 Lab: Investigation - financials



Activity

In this lab, you will answer questions about the financial status of a claim.

WARNING: For this lab, every student will use the same user login. Therefore, do not modify any data.

Never click an Update button for this lab!

1. Log on to ClaimCenter as Andy Applegate(user: aapplegate, password: gw).
2. Open the Robert Farley claim 235-53-365889.
Answer the following questions about the financial status of this claim.
3. What is the Gross Incurred on the claim?
4. What are the total reserves set aside for William Weeks?
5. How much has been paid to William Weeks to date?
6. How many checks have been issued and what are the amounts?
7. How many payments have been issued and what are the amounts?
8. What was the smaller of the payments for?

9. What is the amount of total reserves and remaining reserves for Mr. Weeks's vehicle?
10. What was the \$9,000.00 transaction for?
11. Are all of the payment transactions eroding?
12. When you are done, log out of ClaimCenter.

1.2 Solution: Investigation – financials



Solution

1. Log on to ClaimCenter as Andy Applegate(user: aapplegate, password: gw).
2. Open the Robert Farley claim 235-53-365889.
Answer the following questions about the financial status of this claim.
3. What is the Gross Incurred on the claim?

\$19,500

4. What are the total reserves set aside for William Weeks?

\$17,000

5. How much has been paid to William Weeks to date?

\$9,300

6. How many checks have been issued and what are the amounts?

One for \$9,300

7. How many payments have been issued and what are the amounts?

Two, one for \$300.00 and one for \$9,000.00

8. What was the smaller of the payments for?

Towing and inspection

9. What is the amount of total reserves and remaining reserves for Mr. Weeks's vehicle?

\$5,000 total reserves with \$4,700 remaining

10. What was the \$9,000.00 transaction for?

Payment transaction to Mr. Weeks for initial hospitalization and examination

ClaimCenter 10 Introduction: Essentials - Student Workbook

11. Are all of the payment transactions eroding?

Yes

12. When you are done, log out of ClaimCenter.

Lesson 2

Creating Payments

In this section, you create a claim with several incidents, exposures, and reserves. Because you will be using this claim for several lessons, it is detailed.

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

2.1 Lab: Create a claim



Activity

In this lab, you create a claim for an individual who has a policy with Succeed Insurance. You may have created a similar claim in another ClaimCenter course. Even if you created one earlier, create this one and keep track of the claim date or claim number so you can use it in following labs.

Note: Your instructor will assign you a two-digit number. Whenever you see an "XX" in the lab instructions, replace the "XX" with your two-digit number. For example, if your two-digit number is 07, then when you see an instruction to search for "Kevin SmithXX", you should search for "Kevin Smith07".

1. Log on to ClaimCenter as studentXX / gw (where XX is your assigned number)
2. What is the name of the user with user ID studentXX?

The transcript that follows comes from a customer phone call received by Succeed Insurance which details a first notice of loss. Based on this transcript, create a claim using the full New Claim wizard (not the Quick Claim wizard).

In creating this claim:

- Assume that the phone call was received on the same day that you are doing this lab.
- Create vehicle incidents for every damaged vehicle and detail the driver of the vehicles.
- Create injury incidents for every injury.
- Do not assign the claim using automated assignment rules. Assign the claim to studentXX.
- For data that is required but not specified in the transcript, use any value.

ClaimCenter 10 Introduction: Essentials - Student Workbook

Note: Be sure to capture the address information provided for all claimants. If this is not possible on the ordered steps of the wizard, navigate to the screen in the independent steps that includes the address fields.

Note: Replace the "XX" in all names that follow with your two-digit student ID.

Transcript

Hello. My name is Kevin SmithXX. My policy number is 123456-XX. I was involved in an accident yesterday and I want to report it.

You want to confirm my contact information? I live at 1024 Glenwood Avenue in Waukegan, Illinois. It's probably best to call me on my home phone. It's (312) 336-6210. Yes, I should be the person you contact for questions about this claim. The accident involves my Honda Civic. You should already have it, but if not, my Illinois driver's license number is IL8852562.

The accident occurred at the intersection of McAree Road and Grand Avenue in Waukegan, Illinois. I was driving my Honda Civic on Grand Avenue traveling north. I was trying to make it through a yellow light, but I couldn't. I hit the brakes, but there was oil on the road. I skidded into the intersection and hit a car traveling west on McAree. My car has significant damage across the entire front of the car. I did not get a citation, but the accident was my fault.

The other vehicle was a 2002 Ford Fiesta with an Illinois license plate of 223RFT. The left side of the other car is fairly smashed up, including damage to the driver-side door.

It was driven by Michael CashmanXX. He lives at 713 Leith Avenue, Waukegan, Illinois, 60087. His cell phone number is (312) 343-2909. His Illinois driver's license number is IL2665748.

Mr. CashmanXX was taken to the hospital because of his broken left arm.

I have been to the doctor since the accident and have a concussion.

Yes, my car will need servicing by an auto body repair shop, but I'm not sure which shop I'll be taking it to. I will let you know later. I don't need any services right now.

IMPORTANT: Do not assign the claim using automated assignment rules. Go to the "Save & Assign Claim" step and assign the claim to yourself.

2.2 Solution: Create a claim



Solution

1. Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).
2. What is the name of the user with user ID studentXX?

Sam TudentXX

The Loss Details should look something like the following. There should be 4 exposures; 2 vehicle exposures and 2 injury exposures.

Vehicles (1 - 2 of 2)					
Make	Model	Plate	State	Loss Party	Driver
Ford	Fiesta	223RFT	Illinois	Third-party liability	Michael Cashman
Honda	Civic	1JXZ199	Illinois	Insured's loss	Kevin Smith99

Properties (empty)		
Address	City	State

Injuries (1 - 2 of 2)		
Name	Severity	Description
Michael Cashman	Moderate	Broken left arm
Kevin Smith99	Moderate	Concussion

2.3 Lab: Create exposures and reserves



Activity

In this lab, you add exposures and reserves to the claim you just created.

You continue this practice as StudentXX.

1. Open the claim you just created.
2. Look at the Loss Details. How many incidents are there?

Explore the rest of the claim.

3. How many exposures are there?

4. How many reserves are there and what are they for?

The exposures and reserves that are on the claim were created automatically because of a rule that has been implemented. In the next section, you create exposures and reserves for the rest of the incidents on this claim.

5. Create an exposure to cover the cost of the injury to Kevin SmithXX.
6. Create a reserve in the amount of \$2,000.00 for the claim cost of the medical payments exposure.
7. Create an exposure to cover the cost of the injury to Michael CashmanXX.
8. Create a reserve in the amount of \$6,000.00 for the medical claim cost of the liability exposure.
9. Create an exposure for the repair of Mr. CashmanXX's vehicle.
10. When you created the exposure, ClaimCenter created reserves automatically. As an adjuster, you have found that the automatic reserve is low for the type of damage to Mr. CashmanXX's car. Update the reserve amount to \$3,000.00 for the claim cost for repair of Mr. CashmanXX's vehicle.
11. What is the total gross incurred for the claim?

2.4 Solution: Create exposures and reserves



Solution

1. Open the claim you just created.
2. Look at the Loss Details. How many incidents are there?

4

Explore the rest of the claim.

3. How many exposures are there?

1

4. How many reserves are there and what are they for?

2: claim cost / auto body and expense vehicle inspection

The exposures and reserves that are on the claim were created automatically because of a rule that has been implemented. In the next section, you create exposures and reserves for the rest of the incidents on this claim.

5. Create an exposure to cover the cost of the injury to Kevin SmithXX.

ClaimCenter 10 Introduction: Essentials - Student Workbook

(2) 3rd Party Med Pay - Kevin Smith99

[Edit](#)[Assign](#)[Close Exposure](#)[Create Reserve](#)[Send To ISO](#)

[Details](#)[ISO](#)

Exposure

Loss Party	Third-party liability
Primary Coverage	Medical Payments
Coverage Subtype	Medical Payments
Coverage	Policy Level Coverage (Medical Payments)
Adjuster	Sam Tudent99
Group	Training Group 99
Status	Open
Created Via	User Entry
Create Date	05/08/2018
Validation Level	Ability to pay

6. Create a reserve in the amount of \$2,000.00 for the claim cost of the medical payments exposure.
7. Create an exposure to cover the cost of the injury to Michael CashmanXX.

ClaimCenter 10 Introduction: Essentials - Student Workbook

(3) 3rd Party Bodily Injury - Michael Cashman

Edit

Assign

Close Exposure

Create Reserve

Send To ISO

Refresh Res

Details

ISO

Exposure

Loss Party	Third-party liability
Primary Coverage	Liability - Bodily Injury and Property Damage
Coverage Subtype	Liability - Bodily Injury
Coverage	Policy Level Coverage (Liability - Bodily Injury and Property Damage)
Adjuster	Sam Tudent99
Group	Training Group 99
Status	Open
Created Via	User Entry
Create Date	05/08/2018
Validation Level	Ability to pay

8. Create a reserve in the amount of \$6,000.00 for the medical claim cost of the liability exposure.
9. Create an exposure for the repair of Mr. CashmanXX's vehicle.

(4) 3rd Party Vehicle - Michael Cashman

Edit

Assign

Close Exposure

Create Reserve

Send To ISO

Refresh Res

Details

Total Loss Calculator

ISO

Exposure

Loss Party	Third-party liability
Primary Coverage	Liability - Bodily Injury and Property Damage
Coverage Subtype	Liability - Vehicle Damage
Coverage	Policy Level Coverage (Liability - Bodily Injury and Property Damage)
Adjuster	Sam Tudent99
Group	Training Group 99
Status	Open
Created Via	User Entry
Create Date	05/08/2018
Validation Level	Ability to pay

10. When you created the exposure, ClaimCenter created reserves automatically. As an adjuster, you have found that the automatic reserve is low for the type of damage to Mr. CashmanXX's car. Update the reserve amount to \$3,000.00 for the claim cost for repair of Mr. CashmanXX's vehicle.
11. What is the total gross incurred for the claim?

\$14,500

2.5 Lab: Create payments



Activity

In this lab, you create payments for the Kevin SmithXX claim.

You continue this practice as StudentXX.

1. If it is not open, open the claim you just created.
2. Create a check to Kevin SmithXX that includes the following payments:
 - a) \$900.00 for an initial payment to repair his car. This is for a deposit he had to give the garage. This is a partial payment and you should apply the deductible.
 - b) \$300 for the inspection (he paid for that himself). This payment is final.

- c) \$600 for the medical Payments for Mr. Smith. This is for the payment he had to give the doctor for the examination and tests. We expect more costs to come in so this is a partial payment.
- 3. Create a check to Michael CashmanXX that includes the following payments:**
 - a) \$4,000.00 for hospital bills for his broken arm. We expect more bills to come in so this is a partial payment.
 - b) \$200.00 for his vehicle inspection. This is a one-time cost and is a final payment.
 - c) \$1200 for the initial costs to repair his vehicle. This is a partial payment.
- 4. What is the total amount paid for this claim so far?**
- 5. What is the -\$200 transaction for?**
- 6. What is the amount of the total remaining reserves?**

2.6 Solution: Create payments



Solution

- 1. If it is not open, open the claim you just created.**
- 2. Create a check to Kevin SmithXX that includes the following payments:**
 - a) \$900.00 for an initial payment to repair his car. This is for a deposit he had to give the garage. This is a partial payment and you should apply the deductible.
 - b) \$300 for the inspection (he paid for that himself). This payment is final.
 - c) \$600 for the medical Payments for Mr. Smith. This is for the payment he had to give the doctor for the examination and tests. We expect more costs to come in so this is a partial payment.
- HINT: If you did not add an injury description on the exposure details, the exposure will not be at ability to pay.**
- 3. Create a check to Michael CashmanXX that includes the following payments:**
 - d) \$4,000.00 for hospital bills for his broken arm. We expect more bills to come in so this is a partial payment.
 - e) \$200.00 for his vehicle inspection. This is a one-time cost and is a final payment.
 - f) \$1200 for the initial costs to repair his vehicle. This is a partial payment.
- 4. What is the total amount paid for this claim so far?**

ClaimCenter 10 Introduction: Essentials - Student Workbook

\$6700

5. What is the -\$200 transaction for?

To zero the vehicle inspection expense for Mr. Smith's car. The inspection only cost \$300 and the reserve was for \$500.

6. What is the amount of the total remaining reserves?

\$7300

Lesson 3

Constraining Payments – Approvals

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

3.1 Lab: Investigation



Activity

In this lab, you examine a claim and answer questions about its financial status.

You continue this practice as StudentXX.

1. Log on to ClaimCenter as Sam TudentXX (user: `studentXX`, password: `gw`).
2. Open the Kevin SmithXX claim.

Answer the following questions

3. What is the amount of the total net incurred for this claim?
4. How can the total net incurred affect reserve transaction approval?
5. If you were to modify the 1st party vehicle claim cost / auto body reserve line, what would cause the change to require approval?
6. What are two ways ClaimCenter helps constrain payments?

3.2 Solution: Investigation



Solution

ClaimCenter 10 Introduction: Essentials - Student Workbook

1. Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).
2. Open the Kevin SmithXX claim.

Answer the following questions

3. What is the amount of the net total incurred for this claim?

\$14,000

4. How can the net total incurred affect reserve transaction approval?

In the base application, adjusters may only create reserves where the total is no more than \$15,000 without the transaction requiring approval.

5. If you were to modify the 1st party vehicle claim cost / auto body reserve line, what would cause the change to require approval?

If the amount is over \$1,000 which would make the total net incurred cost over \$15,000 which is the adjusters' limit.

6. What are two ways ClaimCenter helps constrain payments?

Authority limits and transaction approval rules

3.3 Lab: Creating transactions



Activity

In this activity, you create and modify reserves on the Kevin SmithXX claim. You then determine if they need approval and if so, go through the approving process.

1. **Modify the reserve line for the 1st party vehicle (Kevin SmithXX) Claim Cost / Auto body by adding \$1500 to the reserve.**
2. **What is the status of the change to the reserve line?**
3. **Modify the reserve line for 3rd party Bodily Injury (Michael CashmanXX):**
 - a) Add \$8,000 to the Medical Claim Cost.
 - b) Add a new reserve line for Claim Cost – Emergency Services for \$6,000.
 - c) Save the changes.
4. **What was the warning for the reserve line transaction?**
5. **What mechanism issued the warning?**

6. What is the status of the changes and additions to the reserve line?

7. Who is the supervisor that is responsible for approving the transactions?

Next, approve the transactions.

8. Log out of ClaimCenter and log in as Shelley UpervisorXX (user: supervisorXX, password: gw).

9. Why does the 1st Party Vehicle reserve require approval?

10. Approve the transaction.

11. Review the reserve changes to the 3rd Party Bodily Injury – Michael CashmanXX.

a) Can you approve the change to Emergency Services only?

b) Why or why not?

c) What is the reason for this transaction requiring approval?

d) Add a note that you have seen the documentation for the increase in reserves and that the change is reasonable.

e) Approve the change to the Reserve Line.

12. Log out of ClaimCenter and log in as StudentXX.

13. Open the Kevin SmithXX claim.

14. What is the amount of the total gross incurred?

15. Have all of the transactions been approved?

16. How did you discover that?

3.4 Solution: Creating transactions



Solution

ClaimCenter 10 Introduction: Essentials - Student Workbook

- 1. Modify the reserve line for the 1st party vehicle (Kevin SmithXX) Claim Cost / Auto body by adding \$1500 to the reserve.**
- 2. What is the status of the change to the reserve line?**

Pending approval

- 3. Modify the reserve line for 3rd party Bodily Injury (Michael CashmanXX):**
 - f) Add \$8,000 to the Medical Claim Cost.
 - g) Add a new reserve line for Claim Cost – Emergency Services for \$6,000.
 - h) Save the changes. Answer the next 2 questions and then save the transaction.
- 4. What was the warning for the reserve line transaction?**

Gross incurred exceeds exposure limit

- 5. What mechanism issued the warning?**

Transaction approval rules (notice the rule number in the warning message)

- 6. What is the status of the changes and additions to the reserve line?**

Pending approval

- 7. Who is the supervisor that is responsible for approving the transactions?**

Shelley UpervisorXX

Next, approve the transactions.

- 8. Log out of ClaimCenter and log in as Shelley UpervisorXX (user: supervisorXX, password: gw).**
- 9. Why does the 1st Party Vehicle reserve require approval?**

The total reserves for the claim exceeds \$15,000

- 10. Approve the transaction.**

- 11. Review the reserve changes to the 3rd Party Bodily Injury – Michael CashmanXX.**

- i) Can you approve the change to Emergency Services only?

No

- j) Why or why not?

It is part of a Reserve set that must be approved or rejected together.

- k) What is the reason for this transaction requiring approval?

The total reserves for the claim exceed \$15,000

- l) Add a note that you have seen the documentation for the increase in reserves and that the change is reasonable.

- m) Approve the change to the Reserve Line.

- 12. Log out of ClaimCenter and log in as StudentXX.**

- 13. Open the Kevin SmithXX claim.**

ClaimCenter 10 Introduction: Essentials - Student Workbook

14. What is the amount of the total gross incurred?

\$29,500

15. Have all of the transactions been approved?

Yes

16. How did you discover that?

Under Financial → Transactions, none of the reserves have a status of pending approval.

Lesson 4

Constraining Payments – Financial Holds

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

4.1 Lab: Unverified policy



Activity

In this section, you change a coverage on a policy and test the results of the change.

1. Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).
2. Open the Kevin SmithXX claim.
3. Are there any exposures that cannot be paid?
4. How do you know?
5. What can you do that would cause the policy to become unverified?
6. Change the deductible for collision coverage on the Honda Civic to \$300.00.
7. Is the policy still verified?

8. How do you know?
9. Create a check to Michael CashmanXX for 3rd Party Vehicle - Claim Cost / Auto body for \$200.
10. What happened?
11. Create a check to Mr. CashmanXX for 3rd Party Vehicle - Expense A&O Vehicle Inspection for \$200.
12. What happened?
13. Refresh the policy to remove the unverified policy condition.

4.2 Solution: Unverified policy



Solution

1. Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).
2. Open the Kevin SmithXX claim.
3. Are there any exposures that cannot be paid?
No
4. How do you know?
Run Actions → Validate Claim + Exposures → Ability to pay
5. What can you do that would cause the policy to become unverified?
Change anything on the existing policy.
6. Change the deductible for collision coverage on the Honda Civic to \$300.00.
7. Is the policy still verified?
No

8. How do you know?

The Verified Policy field on the Other group on the Policy: General screen.

9. Create a check to Michael CashmanXX for 3rd Party Vehicle - Claim Cost / Auto body for \$200.

10. What happened?

The check was rejected because of the unverified policy.

11. Create a check to Mr. CashmanXX for 3rd Party Vehicle - Expense A&O Vehicle Inspection for \$200.

12. What happened?

There is a warning that this policy is unverified, but it allowed me to create the check.

13. Refresh the policy to remove the unverified policy condition.

4.3 Lab: Coverage in Question



Activity

1. List some items that would cause a claim to move to Coverage in Question.
2. Change the Date of Loss to a date that is outside of the coverage effective dates.
3. Did that cause Coverage in Question?
4. If so, how could you tell (name two ways)?
5. What restrictions are in place because of the Coverage in Question condition?
6. What are two other conditions that cause Financial Holds to be enforced?
7. Reset the Loss Date to a date within the policy effective dates.

8. Did that change remove the Coverage in Question? Why or why not?
9. Log on as SupervisorXX and reset the Coverage in Question.
10. Log on as Sam TudentXX and refresh the policy.
11. Make sure that the Policy is now verified and that the Coverage in Question is No.

4.4 Solution: Coverage in Question



Solution

1. List some items that would cause a claim to move to Coverage in Question.
 - Loss date before the policy's effective date*
 - Loss date after the policy's expiration date*
 - Status on the policy is anything other than In Force or Archived*
2. Change the Date of Loss to a date that is outside of the coverage effective dates.
3. Did that cause Coverage in Question?
 - Yes*
4. If so, how could you tell (name two ways)?
 - Coverage in Question icon on the info bar and Coverage in Question field on the Claim Status screen.*
5. What restrictions are in place because of the Coverage in Question condition?
 - No payment transactions are allowed against Cost types.*
6. What are two other conditions that cause Financial Holds to be enforced?
 - Policy unverified, and Incident only.*
7. Reset the Loss Date to a date within the policy effective dates.
8. Did that change remove the Coverage in Question? Why or why not?
 - No, because you must have the privilege to make that change (need to be a supervisor).*

ClaimCenter 10 Introduction: Essentials - Student Workbook

- 9. Log on as SupervisorXX and reset the Coverage in Question.**
- 10. Log on as Sam TudentXX and refresh the policy.**
- 11. Make sure that the Policy is now verified and that the Coverage in Question is No.**

Lesson 5

Managing Contacts

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

5.1 Lab: Adding contacts to a claim



Activity

In this lab, you add two person contacts and one vendor to the Kevin SmithXX claim.

1. **Log in to ClaimCenter as Sam TudentXX (user: studentXX, password: gw).**
2. **Navigate to the Kevin SmithXX claim.**
3. **Add the following person contacts to the claim:**
 - a) Jennifer CashmanXX was a passenger in Michael CashmanXX's car (Ford Fiesta).
 - b) Jeff SmithXX was a passenger in Kevin SmithXX's car (Honda Civic).
4. **Add the following vendor to the claim.**
 - a) Express Auto in San Francisco, California. (This vendor is temporary. You will create one in Waukegan in a later lesson)
 - b) The vendor is for repair of Kevin SmithXXs' auto (Honda Civic).

5.2 Solution: Adding contacts to a claim



Solution

Use the Parties Involved screen to add the contacts. For the person contacts, use New Contact → Person. For the vendor contact use Add Existing Contact and search for the vendor.

When you have added the 3 contacts to the claim, the Parties Involved should look something like the following.

Contacts		
<div><div>New Contact ▾</div><div>Add Existing Contact</div><div>Delete</div><div>All</div></div>		
<input type="checkbox"/>	Name ▴ ▾	Roles
<input checked="" type="checkbox"/>	Jennifer Cashman99	Passenger
<input type="checkbox"/>	Michael Cashman99	Check Payee, Claimant, Driver, Injured Party
<input type="checkbox"/>	Express Auto	Repair Shop
<input type="checkbox"/>	Jeff Smith99	Passenger
<input type="checkbox"/>	Kevin Smith99	Check Payee, Claimant, Driver, Injured Party, Insured, Main Contact, Reporter

5.3 Lab: Contacts review



Activity

Complete this lab as Sam TudentXX

1. How many contacts are now on the Kevin SmithXX claim?
2. How many of the contacts are claimants?
3. Is Express Auto linked to Address Book?
4. If so, how could you tell (name two ways)?
5. How did it get linked?
6. Can you remove the Passenger role from Jennifer CashmanXX? Why or why not?

5.4 Solution: Contacts review



Solution

1. How many contacts are now on the Kevin SmithXX claim?

5

2. How many of the contacts are claimants?

2

3. Is Express Auto linked to Address Book?

Yes

4. If so, how could you tell (name two ways)?

There is a message on the Basics tab. There is a button to view the contact in Address Book (ContactManager).

5. How did it get linked?

It was linked automatically when the contact was added from Address Book (ContactManager).

6. Can you remove the Passenger role from Jennifer CashmanXX? Why or why not?

No, because each contact must have at least one role to exist on a claim. If I removed the role from Jennifer the contact would be removed from the claim.

Lesson 6

Managing Vendors

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

The default URL for ContactManager is <http://localhost:8280/ab/ContactManager.do>.

6.1 Lab: Creating a vendor in ClaimCenter



Activity

In this lab, you create a vendor in ClaimCenter and edit it in ContactManager.

1. **Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw) and open the Kevin Smith claim.**
2. **Create a contact with the following details:**
 - a) Apple TowingXX (where XX is your student number)
 - b) It is an Auto towing agency.
 - c) The city and state is Waukegan, Illinois and the Tax Id is 851-77-2394
 - d) The role on the claim is towing agency for the Honda Civic.
3. **What is the status of the vendor contact? Why?**
4. **In a separate browser tab or window, log in to ContactManager as Carl Clark (cclark / gw) and approve the vendor you just created. Make sure to approve only your vendor (Apple TowingXX).**
5. **What is the status of the new vendor in ClaimCenter?**
6. **From ContactManager add the following two documents to the new vendor. The documents are in <ClaimCenterInstall>/course material.**
 - a) AppleTowing – SLA.pdf

- b) Apple Towing – ServiceOrderForm.pdf
- 7. **Add Towing as a service to this vendor.**
- 8. **From ClaimCenter, verify that the documents are available for use.**

6.2 Solution: Creating a vendor in ClaimCenter



Solution

1. **Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw) and open the Kevin Smith claim.**
2. **Create a contact with the following details:**

- a) Apple TowingXX (where XX is your student number)
- b) It is an Auto towing agency.
- c) The city and state is Waukegan, Illinois and the Tax Id is 851-77-2394
- d) The role on the claim is towing agency for the Honda Civic.

3. **What is the status of the vendor contact? Why?**

The contact is linked to the AddressBook and in sync, but is pending approval. The new vendor was sent to ContactManager but has not yet been approved.

4. **In a separate browser tab or window, log in to ContactManager as Carl Clark (cclark / gw) and approve the vendor you just created. Make sure to approve only your vendor (Apple TowingXX).**
5. **What is the status of the new vendor in ClaimCenter?**

The contact is linked and in sync.

6. **From ContactManager add the following two documents to the new vendor. The documents are in <ClaimCenterInstall>/course material.**
 - a) AppleTowing – SLA.pdf
 - b) Apple Towing – ServiceOrderForm.pdf
7. **Add Towing as a service to this vendor.**
8. **From ClaimCenter, verify that the documents are available for use.**

Lesson 7

Managing Service Requests

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

7.1 Lab: Creating and managing service requests



Activity

In this lab you create several service requests for the Kevin Smith claim.

1. **Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw) and open the Kevin Smith claim.**
2. **Create a service with the following details:**
 - a) 1st Party Vehicle – Kevin SmithXX
 - b) The service needed is for towing.
 - c) You don't need a quote for this service.
 - d) Use Apple TowingXX (where XX is your student number) as the vendor.
 - e) The service address is Waukegan, IL.
3. **Mark that the vendor has accepted the work, and set the expected service completion date to today's date.**
4. **Mark that the vendor has completed the work.**
5. **Add an invoice for \$200.00.**
6. **Are there any flags on the service? If so what are they and what do they mean?**
7. **Create another service with the following details:**
 - a) 1st Party Vehicle – Kevin Smith
 - b) The service needed is for auto body repair.

ClaimCenter 10 Introduction: Essentials - Student Workbook

- c) You want them to quote and perform this service.
 - d) Use M B Garage as the vendor (in California).
 - e) The service address is 2165 Palm Ave., San Mateo, CA 94404.
 - f) Add instructions that the vehicle was towed to their shop by Apple Towing.
 - g) Set the requested quote date to today's date.
- 8. Set the Vendor Progress to Accepted Work and accept the default completion date.**
- 9. What are the Vendor Progress options now?**
- 10. Why is Vendor Completed not an option?**
- 11. Add a quote with the following details.**
- a) Days to perform service: 5.
 - b) Description: repair and paint front-end.
 - c) Category: Parts, description "front-end parts", amount 800.00.
 - d) Category: Labor, description "installation and paint labor", amount 500.00.
- 12. Approve the quote and accept the default completion date.**

Assume there has been a passage of time.

- 13. Change the Vendor Progress to Vendor Completed Work.**
- 14. What are the Vendor Progress options now? Why?**

- 15. Add an invoice with the following details:**
- a) Description: Mr. Smiths' vehicle repaired and painted.
 - b) Line Item: Parts, front-end parts, \$700.00.
 - c) Line Item: Labor, labor for install and paint, \$500.00
- 16. What happened to the invoice?**

- 17. What is the Invoice Variance vs Quote percentage and what does that mean?**

7.2 Solution: Creating and managing service requests



Solution

1. Log on to ClaimCenter as Sam TudentXX (user: studentXX, password: gw) and open the Kevin Smith claim.
2. Create a service with the following details:
 - d) 1st Party Vehicle – Kevin SmithXX
 - e) The service needed is for towing.
 - f) You don't need a quote for this service.
 - g) Use Apple TowingXX (where XX is your student number) as the vendor.
 - h) The service address is Waukegan, IL.
3. Mark that the vendor has accepted the work, but set the expected service completion date to today's date.
4. Mark that the vendor has completed the work.
5. Add an invoice for \$200.00.
6. Are there any flags on the service? If so what are they and what do they mean?
Yes. The invoice could not be auto-paid because a suitable reserve line could not be determined.
7. Create another service with the following details:
 - i) 1st Party Vehicle – Kevin Smith
 - j) The service needed is for auto body repair.
 - k) You want them to quote and perform this service.
 - l) Use M B Garage as the vendor (in California).
 - m) The service address is 2165 Palm Ave., San Mateo, CA 94404.
 - n) Add instructions that the vehicle was towed to their shop by Apple Towing.
 - o) Set the requested quote date to today's date.
8. Set the Vendor Progress to Accepted Work and accept the default completion date.
9. What are the Vendor Progress options now?
Vendor Cancelled, Vendor Delayed, and Update Reference
10. Why is Vendor Completed not an option?
Because the quote has not been received or approved.
11. Add a quote with the following details.
 - p) Days to perform service: 5.

ClaimCenter 10 Introduction: Essentials - Student Workbook

- q) Description: Repair and paint front-end.
- r) Category: Parts, description "front-end parts", amount 800.00.
- s) Category: Labor, description "installation and paint labor", amount 500.00.

12. Approve the quote and accept the default completion date.

Assume there has been a passage of time.

13. Change the Vendor Progress to Vendor Completed Work.

14. What are the Vendor Progress options now? Why?

Update Reference Number. Since the work is complete, it can't be delayed, waiting, or cancelled.

15. Add an invoice with the following details:

- t) Description: Mr. Smiths' vehicle repaired and painted.
- u) Line Item: Parts, front-end parts, \$700.00.
- v) Line Item: Labor, labor for install and paint, \$500.00

16. What happened to the invoice?

It was paid immediately.

17. What is the Invoice Variance vs Quote percentage and what does that mean?

(8%). The invoice was 8% lower than the quote.

Lesson 8

Permissions and Access Control Lists

Prerequisites

For this lab, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the lab.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

8.1 Lab: Managing permissions and roles



Activity

In this lab, you observe the effects of permissions.

Succeed Insurance wants to control activity on closed claims more tightly. Adjusters should have the ability to create notes on a closed claim, but they should not be able to create documents or activities on a closed claim.

1. **Ask your instructor to take on the role of the implementation team and log on to ClaimCenter as a system administrator. Your instructor should then remove the following permissions from the Adjuster role (if permissions have not already been removed):**
 - Create activities on closed claims (on page 1 of the list)
 - Create documents on closed claims (on page 1 of the list)
2. **Log on to ClaimCenter as useradmin/gw (Ursula Seradmin, a ClaimCenter user administrator).**
3. **Create a new role as follows:**

Name: Closed Claims XX

Description: Permissions to create activities and documents on closed claims

Permissions: include...

Create activities on closed claim

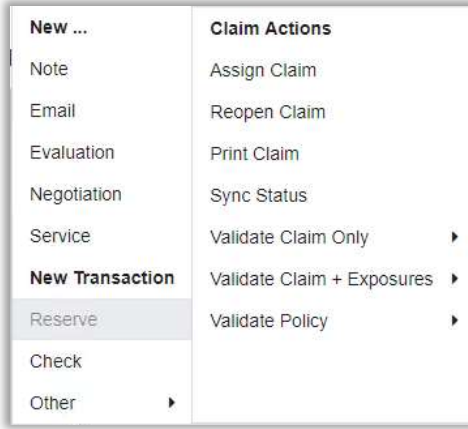
Create documents on closed claim

4. **Modify the coworkerXX user account so that this user has the permission. Do not extend the permission to studentXX. You can complete this step by using one of the two approaches below:**
Search for a user, select the user, and modify the Roles list view, OR

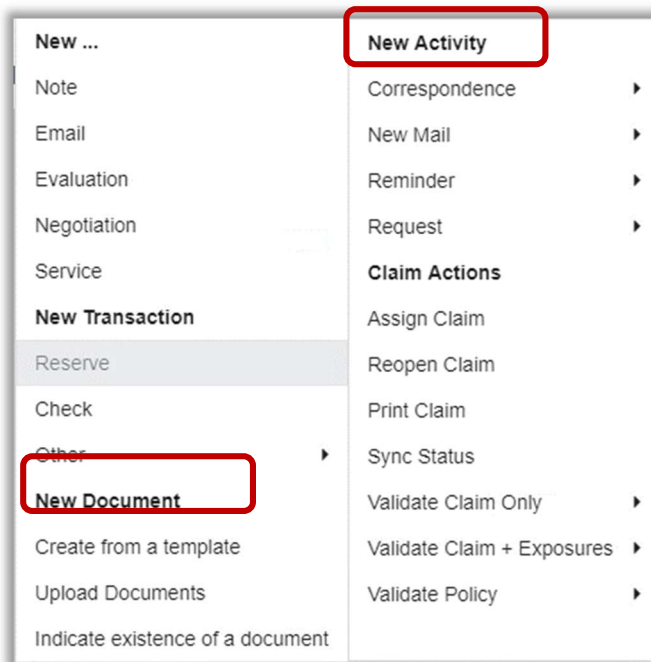
ClaimCenter 10 Introduction: Essentials - Student Workbook

Go to the Roles screen, select the role, navigate to the User tab, and add the user.

5. As studentXX, log on to ClaimCenter and access the Bill Kinman closed claim (235-53-425888).
6. Verify that studentXX cannot create a document or activity on the claim:



7. As coworkerXX, log on to ClaimCenter and access the Bill Kinman closed claim (235-53-425888).
8. Verify that coworkerXX can create a document or activity on the claim.



9. Log out of ClaimCenter.

8.2 Lab: Access Control Lists



Activity

In this lab, you observe how Access Control Lists can change the visibility of a given claim for a given set of users. Remember that the access profiles for the lab are default or base application settings.

1. As coworkerXX, create a claim using the Auto - Quick Claim wizard.

- Search for the policy of Kevin SmithXX.
- In creating the claim, specify the minimal information acceptable.
- Assign the claim to coworkerXX (Cory OworkerXX, a claims adjuster).
- Create the claim.
- Go to the Claim Status menu link (Summary > Status) and verify that the Special Claim Permission field is blank. (This means it's an "unsecured" claim.)

General Status	
Loss Type	Auto
Line of Business	Personal Auto Line
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Incident Only?	No
Claim Status	Open
Date Reported	12/22/2016 10:52 AM
Create Date	12/22/2016
Days Open	0
Primary Adjuster	Cory Worker01
Primary Group	Training Group 01
Special Claim Permission	

In this part of the lab, you log on as each of the following users to see how Access Control Lists can change the visibility of a given claim for a given set of users.

- **Sam TudentXX** (studentXX), who is in the same group as coworkerXX
- **Andy Applegate** (aapplegate), who is in the same security zone as coworkerXX

ClaimCenter 10 Introduction: Essentials - Student Workbook

- **Gerald Ickes** (gickes), who is in a different security zone than coworkerXX
Remember, Cory OworkerXX (coworkerXX) is the claim owner for this lab.
Make a note of the newly created claim number.
- 2. Log on as the other three users to see if you can view the claim. **NOTE: When you log on as studentXX, be sure to use the same number. For example, if you logged on first as coworker07, you should log on as student07 for this step.**
- 3. Can studentXX (same group and therefore same security zone) see the claim?
- 4. Can aapplegate (different group, same security zone) see the claim?
- 5. Can gickes (different security zone) see the claim?
- 6. As coworkerXX, set the claim's Special Claim Permissions field to "Employee claim" and set CiQ to "No". An employee claim should be visible only to users in the owner's group. As the other three users, see if you can view the claim now.
- 7. Can studentXX (same group) see the claim?
- 8. Can aapplegate (different group, same security zone) see the claim?
- 9. Can gickes (different security zone) see the claim?

8.3 Solution: Access Control Lists



Solution

1. As coworkerXX, create a claim using the Auto - Quick Claim wizard.
 - a) Search for the policy of Kevin SmithXX.
 - b) In creating the claim, specify the minimal information acceptable.
 - c) Assign the claim to coworkerXX (Cory OworkerXX, a claims adjuster).
 - d) Create the claim.
 - e) Go to the Claim Status menu link (Summary ▾ Status) and verify that the Special Claim Permission field is blank. (This means it's an "unsecured" claim.)

ClaimCenter 10 Introduction: Essentials - Student Workbook

General Status	
Loss Type	Auto
Line of Business	Personal Auto Line
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Incident Only?	No
Claim Status	Open
Date Reported	12/22/2016 10:52 AM
Create Date	12/22/2016
Days Open	0
Primary Adjuster	Cory Worker01
Primary Group	Training Group 01
Special Claim Permission	

In this part of the lab, you log on as each of the following users to see how Access Control Lists can change the visibility of a given claim for a given set of users.

- **Sam TudentXX** (studentXX), who is in the same group as coworkerXX
 - **Andy Applegate** (aapplegate), who is in the same security zone as coworkerXX
 - **Gerald Ickes** (gickes), who is in a different security zone than coworkerXX
- Remember, Cory WorkerXX (coworkerXX) is the claim owner for this lab.

Make a note of the newly created claim number.

2. Log on as the other three users to see if you can view the claim. **NOTE: When you log on as studentXX, be sure to use the same number. For example, if you logged on first as coworker07, you should log on as student07 for this step.**
3. Can studentXX (same group and therefore same security zone) see the claim?

Yes

4. Can aapplegate (different group, same security zone) see the claim?

Yes

5. Can gickes (different security zone) see the claim?

No

6. As coworkerXX, set the claim's Special Claim Permissions field to "Employee claim" and set CiQ to "No". An employee claim should be visible only to users in the owner's group. As the other three users, see if you can view the claim now.
7. Can studentXX (same group) see the claim?

ClaimCenter 10 Introduction: Essentials - Student Workbook

Yes

8. Can aaggregate (different group, same security zone) see the claim?

No

9. Can gickes (different security zone) see the claim?

No