



ClaimCenter 10 Configuration: Essentials

Student Workbook

Exercises and Tutorials

Table of Contents

Introduction.....	5
Lesson 1 Configuring ClaimCenter Financials – Transactions	6
1.1 Record of note.....	6
1.1.1 Lab	7
1.1.2 Test procedure	7
1.2 Payment matching reserve fraud detection	7
1.2.1 Lab	8
1.2.2 Test procedure	8
1.3 Solutions.....	9
1.3.1 Record of note.....	9
1.3.2 Test procedure	9
1.3.3 Payment matching reserve fraud detection	10
1.3.4 Test procedure	12
Lesson 2 Configuring ClaimCenter Financials – Financial Holds	15
2.1 Place a financial hold if a claim is in litigation.....	15
2.1.1 Lab	15
2.1.2 Test procedure	16
2.2 Solutions.....	17
2.2.1 Place a financial hold if a claim is in litigation.....	17
2.2.2 Test procedure	19
Lesson 3 Configuring ClaimCenter Financials – Transaction Approvals	24
3.1 Extending authority limits	24
3.1.1 Lab	24
3.1.2 Test procedure	25
3.2 Approval for reserves when fault rating is unknown.....	25
3.2.1 Lab	26
3.2.2 Test procedure	26
3.3 Require regional supervisor approval	26
3.3.1 Lab	27
3.3.2 Test procedure	27
3.4 Solutions.....	28
3.4.1 Extending authority limits	29
3.4.2 Test procedure	30
3.4.3 Approval for reserves when fault rating is unknown.....	31
3.4.4 Test procedure	32

ClaimCenter Configuration Essentials - Student Workbook

3.4.5 Require regional supervisor approval	33
3.4.6 Test procedure	34
Lesson 4 Configuring Vendor Services	39
4.1 Adding services.....	39
4.1.1 Lab	39
4.1.2 Test procedure	40
4.2 Invoices on flagged claims.....	40
4.2.1 Lab	41
4.2.2 Test procedure	41
4.3 Solutions.....	42
4.3.1 Adding services.....	42
4.3.2 Test procedure	44
4.3.3 Invoices on flagged claims.....	44
4.3.4 Test procedure	45
Lesson 5 Configuring Search.....	47
5.1 Percent complete field	47
5.1.1 Lab	47
5.1.2 Test procedure	48
5.2 Solutions.....	49
5.2.1 Percent complete field	49
5.2.2 Test procedure	51
Lesson 6 Configuring Claim History	53
6.1 Track changes to salvage status field	53
Prerequisites.....	53
6.1.1 Lab	53
6.1.2 Test procedure	53
6.2 Solutions.....	55
6.2.1 Track changes to salvage status field	55
6.2.2 Test procedure	55
Lesson 7 Configuring Permissions	57
7.1 Limit ability to remove Metro Reports.....	57
7.1.1 Lab	57
7.1.2 Test procedure	57
7.2 Bonus task	58
7.3 Solution	59
7.3.1 Limit ability to remove Metro Reports.....	59
7.3.2 Test procedure	61

ClaimCenter Configuration Essentials - Student Workbook

7.3.3	Bonus task	62
Lesson 8	Business Activity Rules	63
8.1	Lab: Catastrophe rule	63
8.1.1	Lab	63
8.1.2	Test procedure	64
8.2	Solution	66
8.2.1	Catastrophe rule.....	66
8.2.2	Test procedure	69

Introduction

Welcome to the Guidewire **ClaimCenter 10 Configuration: Essentials** course.

The Student Workbook will lead you through the course exercises. The lesson numbers correspond to the lesson numbers in your training. Complete the assigned exercises to the best of your ability within the allotted time.

Lesson 1

Configuring ClaimCenter Financials – Transactions

ClaimCenter has a powerful and flexible financial model that can be configured to meet your organization's specific needs. This allows you to ensure that reserves and payments meet strict guidelines, without significant amounts of manual intervention.

Prerequisites

This lesson, like all the lessons in this class, assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

For this lab, you will use ClaimCenter 10.0, Guidewire Studio, and a supported web browser.

ClaimCenter Server should **not** be running when you start the lab.

The default URL for ClaimCenter 10.0 is <http://localhost:8080/cc/ClaimCenter.do>.

1.1 Record of note

At Succeed Insurance, the current claims processing system writes a "record of note" every time a reserve transaction is created. It captures the cost type, cost category and the total amount of the reserve transaction. Even though this information appears on the Transaction list on the Financials screen, Succeed Insurance wants to ease the transition to the new system by mimicking the "record of note" behavior in the old system.

Notes		
Info	Details	
Edit Delete Print		
Author	Andy Applegate	Apr 16, 2018 9:22 AM
Topic	General	Claim Cost Reserve Transaction
Related To	(1) 1st Party Vehicle - Ray Newton	Labor reserve transaction for \$3000.00 usd created.

1.1.1 Lab



Activity

Write a rule that creates the required record notes.



Tip

This lab uses History records, which are covered in detail in a later lesson.

1. **Write a transaction rule that creates a note every time a reserve transaction is created.**
 - a) The note topic should be **general**.
 - b) The Subject: line should read: **<Cost Type> Reserve Transaction**.
 - c) The Related To field should be populated with the appropriate exposure.
 - d) The note body should read: **<Cost Category> reserve transaction for \$<Transaction Amount> created**.
 - e) This rule should be executed *only* when the transaction is created.
2. **The implementation team has provided the following additional notes:**
 - a) To meet Succeed's requirements, you must use the Reserve entity's **TransactionAmount** field for the note text.
 - b) Since the note will be written when the transaction has been set up (and not when it is modified), you should create the rule in a Post Setup ruleset.

1.1.2 Test procedure

1. Start the ClaimCenter server.
2. Log in as aapplegate/gw.
3. Navigate to a claim with an existing exposure, where coverage is not in question, such as the Allan Robertson claim (235-53-365871).
4. Create two or more reserve lines against the exposure. Save the reserves and verify that notes are added to the claim for each reserve transaction.
5. Edit one line's comment. Verify that a note is not added when editing the reserve.



1.2 Payment matching reserve fraud detection

Succeed Insurance has identified that a common approach to claim fraud involves a disreputable employee who opens a claim, sets a reserve, and then makes a payment equal to the reserve amount. Succeed wants an activity created for the manager to perform a review whenever this occurs, determining whether to refer the check to the Special Investigations Unit (SIU).

1.2.1 Lab



Activity

Write a rule that creates the SIU review activity.

1. **Create a transaction rule that creates a Special Investigation Claim Review activity whenever the amount of a check set equals the remaining reserves on the claim.**
 - a) This rule should be executed every time a transaction is created.
 - b) The activity should be generated whether or not the transaction is approved.
2. **The ClaimCenter implementation team has provided additional notes:**
 - a) You can use the existing SI_review activity pattern.
 - b) You do not need to worry about how the activity gets assigned.

1.2.2 Test procedure

1. **Restart the ClaimCenter server.**
2. **Log in as aapplegate/gw.**
3. **Create a new personal auto claim using the Quick Claim wizard.**
 - a) There must be no exposures (do not add any vehicles, injuries, etc.).
 - b) Be sure to enter a description.
4. **Create a Medical Payments exposure related to the claimant. Enter all necessary information, including details of the injury.**
5. **Create a reserve line for this exposure in the amount of \$5000.**
6. **Verify that the claim and its exposure are at Ability to Pay. If they are not, take any necessary actions to bring them up to Ability to Pay.**
7. **Create a check against the reserve line in the amount of \$5000.**
8. **Check the claim's Workplan. There should be an SI Review activity in the workplan.**



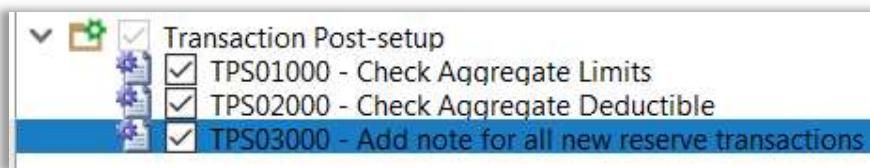
1.3 Solutions

1.3.1 Record of note



Solution

Exact details on how to complete the lab.



```
USES:
uses typekey.*
uses typekey.TransactionSet

CONDITION (transactionSet : entity.TransactionSet):
return transactionSet.Subtype == TransactionSet.TC_RESERVESET

ACTION (transactionSet : entity.TransactionSet, actions : gw.rules.Action):
var note: Note
for (txn in (transactionSet as ReserveSet).Reserves) {
    note = txn.Claim.addNote(NoteTopicType.TC_GENERAL,
        txn.CostType.DisplayName + " Reserve Transaction",
        txn.CostCategory.DisplayName +
            " reserve transaction for $" +
            txn.TransactionAmount + " created.")
    note.RelatedTo = txn.Exposure
}
END
```

1.3.2 Test procedure

All claimants	Coverage	Claimant	Adjuster	Status	Remaining Reserves	Future Payments	Paid
<input type="checkbox"/> 1 Vehicle	Liability - Bodily Injury and Property Damage	Ray Newton	Andy Applegate	Open	-	-	-
<input type="checkbox"/> 2 Personal Property	Personal Effects	Ray Newton	Andy Applegate	Open	-	-	-

(1) 1st Party Vehicle - Ray Newton

Up to Exposures

Edit Assign Close Exposure Create Reserve Send To ISO Refresh Responses

Details Total Loss Calculator ISO

Set Reserves

All line items added or changed below will be submitted as a group. Any line item with no change will not be saved. Any line item with Pending Approval reserves that has its New Available Reserves set will have those Pending Approval reserves deleted. Comments are saved only when another field on the line has changed.

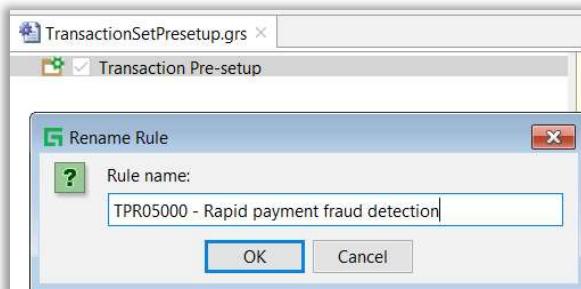
Filtered by: Exposure

Exposure	Coverage	Cost Type*	Cost Category*	Currently Available	Pending Approval	New Available Reserves*	Change
(1) 1st Party Vehicle - Ray Newton	Liability - Bodily Injury and Property Damage	Claim Cost	Auto parts	-	-	\$ 2,000.00	\$
(1) 1st Party Vehicle - Ray Newton	Liability - Bodily Injury and Property Damage	Claim Cost	Labor	-	-	\$ 3,000.00	\$

Notes

Info		Details
Edit	Delete	Print
Author	Andy Applegate	Apr 16, 2018 9:22 AM
Topic	General	Claim Cost Reserve Transaction
Related To	(1) 1st Party Vehicle - Ray Newton	Labor reserve transaction for \$3000.00 usd created.
Edit	Delete	Print
Author	Andy Applegate	Apr 16, 2018 9:22 AM
Topic	General	Claim Cost Reserve Transaction
Related To	(1) 1st Party Vehicle - Ray Newton	Auto parts reserve transaction for \$2000.00 usd created.

1.3.3 Payment matching reserve fraud detection



```
USES:  
uses typekey.*  
uses typekey.TransactionSet  
  
CONDITION (transactionSet : entity.TransactionSet):  
return transactionSet.Subtype == TransactionSet.TC_CHECKSET  
  
ACTION (transactionSet : entity.TransactionSet, actions : gw.rules.Action):  
var remainingReserveCalc =  
    gw.api.financials.FinancialsCalculations.getRemainingReserves()  
if (remainingReserveCalc.withClaim(transactionSet.Claim).Amount.Amount ==  
    (transactionSet as CheckSet).PaymentsAmount) {  
    transactionSet.Claim.createActivityFromPattern(null,  
        ActivityPattern.finder.getActivityPatternByCode("SI_review"))  
}  
END
```

1.3.4 Test procedure

New Exposure - Med Pay

Exposure	
Loss Party	Third-party liability
Primary Coverage	Medical Payments
Coverage Subtype	Medical Payments
Coverage	Policy Level Coverage (Medical Payments)
Claimant	
Claimant	* Kevin Smith04
Type	* Insured
Contact Prohibited?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Primary Phone	312-336-6210
Address	1024 Glenwood Avenue, Waukegan, IL 60085
Alternate Contact	<none>
Injury Incident Overview	
Injury	* Kevin Smith04, Moderate Concussion
Injured Person	Kevin Smith04
Severity	Moderate
Description	Hit on head

Injury Incident

[Return to New Exposure - Med Pay](#)

Injury Details	
Injured Person	* Kevin Smith04
Loss Party	* Insured's loss
Severity	Moderate
Describe Injuries	Hit on head
General Injury Type	Specific injury
Detailed Injury Type	Concussion

Body Parts		Add	Remove	Make First
Area of Body*	Body Part*	Body Part Description	Side	PPD Percentage
Head	Brain			%

Edit Reserves

All line items added or changed below will be submitted as a group. Any line item with no change will not be saved. Any line item with Pending Approval reserves that has its New Available Reserves set to equal Pending Approval reserves deleted. Comments are saved only when another field on the line has changed.

Filtered by: Exposure

Exposure	Coverage	Cost Type*	Cost Category*	Currently Available	Pending Approval	New Available Reserves *
(1) 3rd Party Med Pay - Kevin Smith04	Medical Payments	Claim Cost	Medical	-	-	\$ 5,000.00
				-	-	\$ 5,000.00

Step 2 of 3: Enter payment information

Exposure	Coverage	Cost Type	Cost Category
(1) 3rd Party Med Pay - Kevin Smith04	Medical Payments	Claim Cost	Medical

Payment Details

Reserve Line * (1) 3rd Party Med Pay - Kevin Smith04; Claim Cost/Medical

Coverage Medical Payments

Payment Type * Final

Eroding? * Yes

Available Reserves \$5,000.00

Comments

Line Items

Add Item	Remove	Category	Amount
		<none>	\$ 5,000

Workplan

All open activities			
Due	Priority	Status	Subject
10/24/2018	Urgent	Open	Special Investigation Claim Review

Lesson 2

Configuring ClaimCenter Financials – Financial Holds

Financial holds allow a claim to get to “ability to pay” without approving any claim expenses. This is useful when indemnification is being denied on a claim, but there are still expenses to be paid on the claim.

Prerequisites

This lesson assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

For this lab, you will use ClaimCenter 10.0, Guidewire Studio, and a supported web browser.

ClaimCenter Server should **not** be running when you start the lab.

2.1 Place a financial hold if a claim is in litigation



Activity

Succeed Insurance wants financial holds to be in place when a claim is in litigation. If a claim is in litigation:

- No indemnity payments are allowed, but expense payments are allowed with a warning.
- No indemnity reserves are allowed, but expense reserves are allowed with a warning.

2.1.1 Lab

Succeed Insurance wants financial holds to be in place when a claim is in litigation. If a claim is in litigation:

- No indemnity payments are allowed, but expense payments are allowed with a warning.
- No indemnity reserves are allowed, but expense reserves are allowed with a warning.

1. Add display keys for the warning and error messages to display.properties.

configuration → config → Localizations → Resource Bundle ‘display’ → display.properties

2. Modify FinancialHoldsImpl.gs to meet the requirement.

A claim’s litigation status is stored in the **Claim.LitigationStatus** field.

3. Create a validation rule to finish implementing the requirement.

4. Start the ClaimCenter server in debug mode.

2.1.2 Test procedure

1. Log in to ClaimCenter as aapplegate/gw.
2. Create a new claim that is not in a financial hold situation, and has no reserves or payments made.
Claim 235-53-373871 (Brittany Turner) is such a claim.
3. Verify that the claim and all exposures are at Ability to Pay.
If not, make any necessary changes so that the claim will be at Ability to Pay.
4. Put the claim into litigation.
 - a) Go to Summary ➔ Claim Status.
 - b) Click Edit.
 - c) Change Litigation Status to In Litigation.
 - d) Ensure that Coverage in Question is set to No.
 - e) Click Update.
5. Create transactions.
 - a) Click Actions ➔ Reserve.
 - b) Attempt to create a claim cost reserve and verify that the error message appears.
 - c) Create an expense reserve and verify that the warning message appears.
6. Navigate to a claim that is not already in a financial hold situation and has reserves already on it.
Claim 235-53-425892 (Karen Egertson) is such a claim.
7. Verify that the claim and all exposures are at Ability to Pay.
If not, make any necessary changes so that the claim will be at Ability to Pay.
8. Create a reserve for claim expenses, if necessary.
Login as claims manager (ssmith/gw) and approve the reserve (if necessary).
9. Put the claim into litigation.
10. Create a transaction.
 - a) Click Actions ➔ Reserves.
 - b) Attempt to create a claim cost check and verify that the error message appears.
 - c) Create an expense check and verify that the warning appears.



2.2 Solutions

2.2.1 Place a financial hold if a claim is in litigation

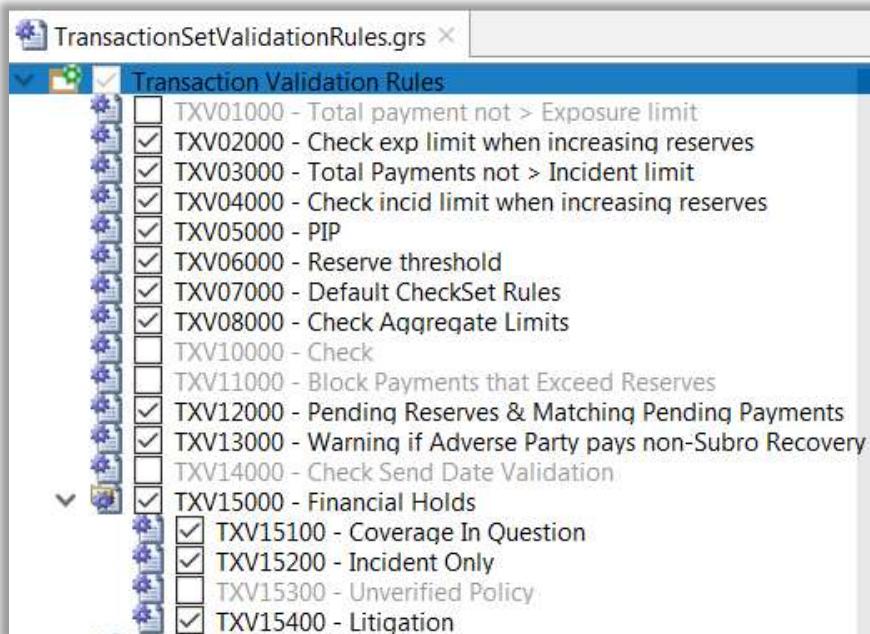


Solution

Exact details on how to complete the lab.

```
SI.Rules.Validation.FinancialHolds.LitigationError = You cannot complete this transaction because the claim is in litigation.  
SI.Rules.Validation.FinancialHolds.LitigationWarning = This claim is in litigation. Are you sure you want to complete this transaction
```

```
1 package gw.api.financials  
2  
3 @Export  
4 class FinancialHoldsImpl implements FinancialHolds {  
5  
6     private var _claim: Claim  
7  
8     construct(claim: Claim) { _claim = claim }  
9  
10    override function applyFinancialHolds() : Boolean {  
11        return _claim.CoverageInQuestion  
12        or _claim.IncidentReport  
13        or not _claim.Policy.Verified  
14        or _claim.LitigationStatus == LitigationStatus.TC_LITIGATED  
15    }  
16  
17 }  
18 }
```



USES:

```
uses gw.api.locale.DisplayKey

CONDITION (transactionSet : entity.TransactionSet):
return transactionSet.Claim.LitigationStatus == LitigationStatus.TC_LITIGATED
ACTION (transactionSet : entity.TransactionSet, actions : gw.rules.Action):
if (transactionSet.Transactions.toList().hasMatch(\t ->
    t.CostType == CostType.TC_CLAIMCOST)) {
    transactionSet.reject(ValidationLevel.TC_PAYMENT,
        DisplayKey.get("SI.Rules.Validation.FinancialHolds.LitigationError"),
        null, null)
} else {
    transactionSet.reject(null, null,
        ValidationLevel.TC_PAYMENT,
        DisplayKey.get("SI.Rules.Validation.FinancialHolds.LitigationWarning"))
}
END
```

2.2.2 Test procedure

High-Risk Indicators

Litigation

Litigation Status: In litigation

Litigation Identified

Days after FNOL

First Notice Suit: Yes No

Next Trial Date

Set Reserves

	Exposure	Coverage	Cost Type*	Cost Category*	Currently Available	Pending Approval	New Available Reserves*
1	<input type="checkbox"/>	(1) 1st Party Vehicle - Robert Farley	Collision	Claim Cost	Auto body	-	\$ 500.00
2	<input type="checkbox"/>						
3	<input type="checkbox"/>						
4	<input type="checkbox"/>						

Validation Results

Validation Results

Clear

You cannot complete this transaction because the claim is in litigation.

Set Reserves

	Exposure	Coverage	Cost Type*	Cost Category*	Currently Available	Pending Approval	New Available Reserves*
1	<input type="checkbox"/>	(1) 1st Party Vehicle - Robert Farley	Collision	Unspecified Cost Type	Vehicle inspection	-	\$ 500.00
2	<input type="checkbox"/>						
3	<input type="checkbox"/>						
4	<input type="checkbox"/>						

Validation Results

Validation Results

Clear

Warnings:

This claim is in litigation. Are you sure you want to complete this financial transaction?

Step 1 of 3: Enter payee information

Pay To Deduction Type Delivery Method Check Portion

Freeb's Auto Shoppe Send

Primary Payee

Name

Type

Payment Method Check Electronic funds transfer

Pay To The Order Of

Mail To

Check Delivery

Recipient

Mailing Address

Step 2 of 3: Enter payment information

The screenshot shows the 'Enter payment information' step of the ClaimCenter Configuration Essentials process. At the top, there is a table with columns: Exposure, Coverage, Cost Type, Cost Category, Amount, Payment Type, and Comments. One row is selected, showing a vehicle named '(1) 1st Party Vehicle - Mark Henderson' with a comprehensive coverage type, a claim cost of \$250.00, and an auto body cost category.

The main area contains a 'Payment Details' form with fields for Reserve Line, Coverage, Payment Type, Eroding?, Available Reserves, Comments, and Line Items. The 'Line Items' section includes buttons for 'Add Item', 'Remove', and 'Apply Deductible: \$500.00 Remaining'. Below this, there is a table for adding line items with columns for Category and Amount. An item is listed with a category of '<none>' and an amount of '\$ 250.00'.

At the bottom, a red box highlights the 'Validation Results' section. It shows a 'Validation Results' header, a 'Clear' button, and an 'Errors' section containing a single message: 'You cannot complete this transaction because the claim is in litigation.'

Exposure	Coverage	Cost Type	Cost Category	Amount	Payment Type	Comments
(1) 1st Party Vehicle - Mark Henderson	Comprehensive	Claim Cost	Auto body	\$250.00	Partial	

Payment Details

Reserve Line: (1) 1st Party Vehicle - Mark Henderson; Claim Cost/Aut

Coverage: Comprehensive

Payment Type: Partial

Eroding?: Yes

Available Reserves: \$1,500.00

Comments:

Line Items

Add Item | Remove | Apply Deductible: \$500.00 Remaining

Category	Amount*
<none>	\$ 250.00

Validation Results

Validation Results

Clear

Errors:

You cannot complete this transaction because the claim is in litigation.

Step 1 of 3: Enter payee information

Pay To	Deduction Type	Delivery Method	Check Portion
<input type="checkbox"/> Arthur Frobish	Send		

[Check Details](#)

Primary Payee

Name	* Arthur Frobish
Type	* Vendor

[Add Joint Payees](#)

Payment Method Check Electronic funds transfer

Pay To The Order Of * Arthur Frobish

Mail To

Check Delivery	Send
Recipient	* Arthur Frobish

Step 2 of 3: Enter payment information

Exposure	Coverage	Cost Type	Cost Category	Amount	Payment Type
<input type="checkbox"/> (1) 1st Party Vehicle - Mark Henderson	Comprehensive	Expense - A&O	Vehicle inspection	\$75.00	Partial
\$75.00					

[Payment Details](#)

Reserve Line * (1) 1st Party Vehicle - Mark Henderson; Expense - A&O

Coverage Comprehensive

Payment Type * Final

Eroding? * Yes No

Available Reserves \$75.00

Comments

Line Items

Add Item	Remove
<input type="checkbox"/> Category	Amount*
<input type="checkbox"/> <none>	\$ 75.00
\$75.00	

[Validation Results](#)

Validation Results

[Clear](#)

Warnings:

⚠ This claim is in litigation. Are you sure you want to complete this financial transaction?

Financials (Total Incurred: \$1,575.00): Checks

Check Number	Pay To	Gross Amount	Issue Date	Scheduled Send Date	Status	Bulk Invoice
	Arthur Frobish	\$75.00		04/23/2018	Awaiting submission	

Lesson 3

Configuring ClaimCenter Financials – Transaction Approvals

ClaimCenter provides highly configurable transaction approval and approval routing rulesets that can enforce an insurer's approval policies.

3.1 Extending authority limits



Activity

Answer the questions below.

1. **Succeed Insurance has determined that the limits in the Claims Supervisor authority limit profile do not match their approval policies. Claims Supervisors should be able to approve total claim cost payments up to \$50,000, but only \$15,000 for other types of payment.**
2. **What is the best way to implement this requirement?**

3. **Betty Baker (bbaker) is a Senior Auto Adjuster – the only one in the company. She should be able to approve reserves and payments on personal and commercial auto policies up to \$25,000, but no other reserves and payments.**
4. **What are two ways to implement this requirement?**

Prerequisites

This lesson assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should be running when you start the lab.

3.1.1 Lab

1. Log in to ClaimCenter as admin/gw.

2. Edit the ClaimsSupervisor authority limit profile so that Claims Supervisors can approve claim cost payments up to \$50,000, but only \$15,000 for other costs.
3. Create a custom authority limit profile for Betty Baker so that she can approve reserves and payments up to \$25,000 on personal and commercial auto policies but cannot approve any other reserves or payments.

3.1.2 Test procedure

1. Log on to ClaimCenter as bbaker/gw (Betty Baker).
 - a) Navigate to the Brittany Turner claim (**235-53-373871**).
 - b) Verify that the claim and its exposures are at **Ability to pay**.
 - c) On the third exposure (**3rd Party Bodily Injury**), create a reserve in the amount of \$24,000.
 - The cost type is **Claim Cost** and the cost category is **Medical**.
 - d) What is the status of the reserve?
 - e) Try to write a check based on the reserve you created, to Kathy Hammet, the injured party. What happens?
 - f) On the first exposure, attempt to create a reserve in the amount of \$30,000.
 - The cost type is **Claim Cost** and the cost category is **Auto Body**.
 - g) What happens?
 - h) Log out of ClaimCenter.
2. Log in to ClaimCenter as ssmith/gw.
 - a) Note that you have a **Review and approve new payment** activity on the Brittany Turner claim. Open and approve it. What happens?
 - b) On the second exposure, create a new reserve with cost type **Claim Cost** and cost category **Auto Body**, in the amount of \$50,001. What happens?



3.2 Approval for reserves when fault rating is unknown

In some cases, the fault rating is undetermined at the time of claim creation. The Fault Rating field is set to “Fault unknown” and the claim is adjusted as usual. Eventually a fault rating is determined, and the field is updated.

Succeed Insurance's business policies let adjusters create reserves on claims where the fault is unknown, but the reserve requires approval by the supervisor of the claim's assigned group.

Specifically:

- Any reserve transaction on a claim with an unknown fault rating requires approval by the claim's assigned group supervisor.
- If approved by the supervisor of the group to which this claim was assigned, the claim does not require further approval.
- To summarize, allows supervisors to approve the transaction without requiring further approval.
- The reason to be given for the approval should be: "Reserve on claim with unknown fault rating."

Prerequisites

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should be running when you start the lab.

3.2.1 Lab



Activity

1. Create a display key to display the message.
2. Create the rule or rules needed to enforce the policy.

3.2.2 Test procedure

1. Reload changed classes.
2. Log on to ClaimCenter as bbaker/gw and create a new claim for Ray Newton using the Quick Claim Auto wizard. Set the Fault Rating field explicitly to Fault unknown.
 - a) Be sure to assign the claim to Betty Baker (Auto 1 – Team A).
3. Create an exposure using the Comprehensive Coverage on Ray's Toyota Corolla.
4. Create a reserve on the claim. Verify that the reserve transaction is set to Pending approval with a reason of Reserve on claim with unknown fault rating. Verify that the approval activity has been routed to the supervisor of the group the claim is assigned to (Sue Smith).



3.3 Require regional supervisor approval



Activity

Succeed Insurance has a policy of being especially careful that payments are correct when a fatality is involved in a claim. For claims where there has been a fatality, all payments

must be reviewed and approved by the Regional Supervisor (the supervisor of the Group Supervisor). The reason to be given for the approval is “Fatality - Verify correctness of payment”.

Prerequisites

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should be running when you start the lab.

3.3.1 Lab

1. Create a display key to display the message.
2. Create the rule or rules needed to enforce the policy.

3.3.2 Test procedure

1. Reload changed classes.
2. Log in to ClaimCenter as aapplegate/gw.
3. Create a worker's compensation claim. Make up the details **except**:
 - a) For the injured worker, create a new person.
 - b) Give the injured worker a full primary address and a social security number.
 - c) On the **Add claim information** step, give an injury description; and for **Injury/Illness Result In Death?**, select Yes.
 - d) Assign the claim to yourself (**aapplegate**).
4. Navigate to the claim. There should be an Indemnity present.
5. Create a reserve of \$20,000 for the indemnity, cost type Claim Cost, cost category Death Benefits. (If necessary, log in as other users to approve the reserve, then log back in as Andy Applegate.)
6. Attempt to create a check for \$10,000 against the Indemnity, to the claimant.
 - a) The payment type should be Partial.
 - b) The category should be Other.
7. In the sidebar, select Workplan.
 - a) Verify that there is a **Review and approve new payment** activity assigned to Super Visor.
8. Log in as svisor/gw
 - a) Approve the check.
 - b) Verify that the status of the check is now **Awaiting submission**.



3.4 Solutions



Solution

Exact details on how to complete the lab.

1. Succeed Insurance has determined that the limits in the Claims Supervisor authority limit profile do not match their approval policies. Claims Supervisors should be able to approve total claim cost payments up to \$50,000, but only \$15,000 for other types of payment..
2. What is the best way to implement this requirement?

Edit the authority limit of Claims Supervisors so that their maximum approval for payments is \$15,000.

Then add a line that allows them to approve claim cost payments up to \$50,000.

3. Betty Baker (bbaker) is a Senior Auto Adjuster – the only one in the company. She should be able to approve reserves and payments on personal and commercial auto policies up to \$25,000, but no other reserves and payments at all.
4. What are two ways to implement this requirement.
 - a) Create a Senior Auto Adjuster profile and set its limits accordingly.
 - b) Give Betty Baker a custom profile and set its limits accordingly

Senior Auto Adjuster																													
Up to Authority Limit Profile																													
Name	Senior Auto Adjuster																												
Description	Senior Auto Adjuster																												
Authority Limits																													
<table border="1"><thead><tr><th>Limit Type</th><th>Policy Type</th><th>Coverage Type</th><th>Cost Type</th><th>Amount</th></tr></thead><tbody><tr><td>Claim payments to date</td><td>Commercial Auto</td><td></td><td></td><td>\$25,000.00</td></tr><tr><td>Claim total reserves</td><td>Personal Auto</td><td></td><td></td><td>\$25,000.00</td></tr><tr><td>Claim total reserves</td><td>Commercial Auto</td><td></td><td></td><td>\$25,000.00</td></tr><tr><td>Claim payments to date</td><td>Personal Auto</td><td></td><td></td><td>\$25,000.00</td></tr></tbody></table>					Limit Type	Policy Type	Coverage Type	Cost Type	Amount	Claim payments to date	Commercial Auto			\$25,000.00	Claim total reserves	Personal Auto			\$25,000.00	Claim total reserves	Commercial Auto			\$25,000.00	Claim payments to date	Personal Auto			\$25,000.00
Limit Type	Policy Type	Coverage Type	Cost Type	Amount																									
Claim payments to date	Commercial Auto			\$25,000.00																									
Claim total reserves	Personal Auto			\$25,000.00																									
Claim total reserves	Commercial Auto			\$25,000.00																									
Claim payments to date	Personal Auto			\$25,000.00																									

Betty Baker

Basics Profile **Authority Limits** Attributes Regions Details

Authority Limit Profile Custom

Description Custom Profile

Authority Limits

Limit Type	Policy Type	Coverage Type	Cost Type	Amount
Claim payments to date	Commercial Auto			\$25,000.00
Claim payments to date	Personal Auto			\$25,000.00
Claim total reserves	Commercial Auto			\$25,000.00
Claim total reserves	Personal Auto			\$25,000.00

3.4.1 Extending authority limits

Claims Supervisor

[Up to Authority Limit Profile](#)

Name Claims Supervisor

Description Claims supervisor default authority

Authority Limits

Limit Type	Policy Type	Coverage Type	Cost Type	Amount
Claim payments to date			Claim Cost	\$50,000.00
Claim payments to date				\$25,000.00
Claim total reserves				\$25,000.00
Payments exceed reserves				\$10,000.00

Betty Baker

Basics Profile **Authority Limits** Attributes Regions Details

Authority Limit Profile Custom

Description Custom Profile

Authority Limits

Limit Type	Policy Type	Coverage Type	Cost Type	Amount
Claim payments to date	Commercial Auto			\$25,000.00
Claim payments to date	Personal Auto			\$25,000.00
Claim total reserves	Commercial Auto			\$25,000.00
Claim total reserves	Personal Auto			\$25,000.00

3.4.2 Test procedure

1. Log on to ClaimCenter as bbaker/gw (Betty Baker).
 - a) Navigate to the Brittany Turner claim (**235-53-373871**).
 - b) Verify that the claim and its exposures are at **Ability to pay**.
 - c) On the third exposure (**3rd Party Bodily Injury**), create a reserve in the amount of \$24,000.
 - The cost type is **Claim Cost** and the cost category is **Medical**.
 - d) What is the status of the reserve?

Submitting

- e) Try to write a check based on the reserve you created, to Kathy Hammet, the injured party. What happens?

The check is Awaiting submission.

- f) On the first exposure, attempt to create a reserve in the amount of \$30,000.
 - The cost type is **Claim Cost** and the cost category is **Auto Body**.What happens?

The reserve is Pending approval.

- g) Log out of ClaimCenter.

2. Log in to ClaimCenter as ssmith/gw.

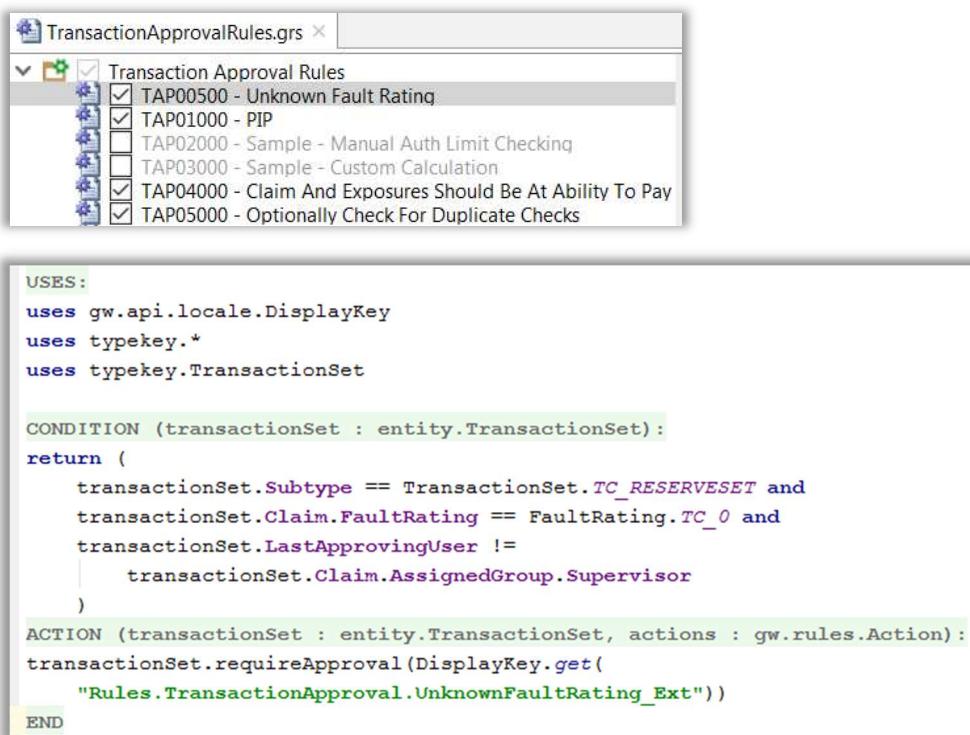
- a) Note that you have a **Review and approve new payment** activity on the Brittany Turner claim. Open and approve it. What happens?

The approval is reassigned to Sue's supervisor, Mike Maples, because Sue does not have authority to approve it.

- b) On the second exposure, create a new reserve with cost type **Claim Cost** and cost category **Auto Body**, in the amount of \$50,001. What happens?

The check is Pending approval

3.4.3 Approval for reserves when fault rating is unknown



The screenshot shows a software interface with two main sections. The top section is a tree view titled "TransactionApprovalRules.grs" containing several rules, each with a checkbox and a description:

- TAP00500 - Unknown Fault Rating (checked)
- TAP01000 - PIP (checked)
- TAP02000 - Sample - Manual Auth Limit Checking (unchecked)
- TAP03000 - Sample - Custom Calculation (unchecked)
- TAP04000 - Claim And Exposures Should Be At Ability To Pay (checked)
- TAP05000 - Optionally Check For Duplicate Checks (checked)

The bottom section is a code editor window displaying a GWT script:

```
USES:  
uses gw.api.locale.DisplayKey  
uses typekey.*  
uses typekey.TransactionSet  
  
CONDITION (transactionSet : entity.TransactionSet) :  
return (  
    transactionSet.Subtype == TransactionSet.TC_RESERVESET and  
    transactionSet.Claim.FaultRating == FaultRating.TC_0 and  
    transactionSet.LastApprovingUser !=  
        transactionSet.Claim.AssignedGroup.Supervisor  
)  
ACTION (transactionSet : entity.TransactionSet, actions : gw.rules.Action) :  
transactionSet.requireApproval(DisplayKey.get(  
    "Rules.TransactionApproval.UnknownFaultRating_Ext"))  
END
```

3.4.4 Test procedure

Step 2 of 2: Quick Claim Auto

Cancel
Back
Finish
Go to full wizard

Loss Details	
Loss Cause	* Falling or moving object
Fault Rating	Fault unknown
Date of Loss	04/26/2018 10:05 AM

New Exposure	
Choose by Coverage Type ▶	
Choose by Coverage ▶	Policy Level Coverage ▶
Claim Actions	1996 Toyota Corolla (2GDH967 / California) ▶ 1997 Saturn SL (1HGJ465 / California) ▶
Assign Claim	Liability - Bodily Injury and Property Damage ▶
Close Claim	Collision
Print Claim	Comprehensive
	Medical Payments

Exposures	
All claimants ▾ <input type="checkbox"/> # ▾ <input type="checkbox"/> Type ▾ <input type="checkbox"/> Coverage ▾ <input type="checkbox"/> Claimant <input type="checkbox"/> Adjuster ▾ <input type="checkbox"/> Status ▾ <input type="checkbox"/> Remaining Reserves <input type="checkbox"/> Future Payments <input type="checkbox"/> Paid <input type="checkbox"/> 1 Vehicle Comprehensive Ray Newton Betty Baker Open	Assign Refresh Close Exposure C

Financials (Total Incurred: \$0.00): Transactions	
Create Date ▾ <input type="checkbox"/> Amount ▾ <input type="checkbox"/> Exposure ▾ <input type="checkbox"/> Coverage ▾ <input type="checkbox"/> Cost Type ▾ <input type="checkbox"/> Cost Category ▾ <input type="checkbox"/> Status ▾ <input type="checkbox"/> User ▾ 04/26/2018 \$5,000.00 1 Comprehensive Claim Cost Auto body Pending approval Betty Baker	

The screenshot shows the 'Workplan' screen with a single activity listed:

Due	Priority	Status	Subject	Exposures	External	Ext Owner	Assigned By	Assigned To
04/26/2018	High	Open	Review and approve reserve change	(1) 1st Party Vehicle - Ray Newton	No	Betty Baker	Sue Smith	

3.4.5 Require regional supervisor approval

`SI.Rules.TransactionApproval.Fatality = Fatality - verify correctness of payment.`

The screenshot shows the 'TransactionApprovalRules.grs' rule group with the following rules:

- TAP00500 - Unknown Fault Rating
- TAP01000 - PIP
- TAP02000 - Sample - Manual Auth Limit Checking
- TAP03000 - Sample - Custom Calculation
- TAP04000 - Claim And Exposures Should Be At Ability To Pay
- TAP05000 - Optionally Check For Duplicate Checks
- TAP06000 - Fatality on Claim

```
USES:
uses ...

CONDITION (transactionSet : entity.TransactionSet):
return transactionSet.Claim.FatalityClaimIndicator.IsOn and
    transactionSet.LastApprovingUser != (RuleGroups.instance.getHeadquartersSupervisor())
    and transactionSet typeis CheckSet
ACTION (transactionSet : entity.TransactionSet, actions : gw.rules.Action):
if (transactionSet.requireApproval("SI.Rules.TransactionApproval.Fatality")) {
    actions.exit()
}

END
```

The screenshot shows the 'ApprovalRules.grs' rule group with the following rules:

- ARR00500 - Fatality to Regional Supervisor
- ARR01000 - Western Regional Auto Supervisors
- ARR02000 - Try to assign to group supervisor
- ARR03000 - Default rule

USES:

```
uses util.RuleGroups
```

```
CONDITION (transactionSet : entity.TransactionSet):
return transactionSet typeis CheckSet and
    transactionSet.Claim.Activities.toList().hasMatch(\act ->
        act.TransactionSet == transactionSet and act.Approved != true)
ACTION (transactionSet : entity.TransactionSet, actions : gw.rules.Action):
if (transactionSet.Claim.FatalityClaimIndicator.isIsOn()){
    transactionSet.setApprovingUser((RuleGroups.instance.getHeadquartersSupervisor()),
        RuleGroups.instance.getHeadquarters())
    actions.exit()
}
END
```

3.4.6 Test procedure

Injured Worker Name

Name * <none>

Injured Worker Social Security #

New Person [Return to Step 2 of 4: Basic information](#)

Basics Addresses Related Contacts

Update Cancel | Check for Duplicates

This contact is not linked to the Address Book

Person	Additional Info
Prefix <none>	ID Type Social Security Number
First name Ima	Tax ID (SSN) ***-**-1234
Middle name	SSN Release Authorized? <input checked="" type="radio"/> Yes <input type="radio"/> No
Last name * Pseumac	Employee Security ID

Primary Address

Country	United States
Address 1	1313 Mockingbird Heights
Address 2	
Address 3	
City	Alpharetta
County	
State	Georgia
ZIP Code	30005-####

Step 2 of 4: Basic information

Policy Location	
Location Code	75 Marta Way, Atlanta, GA 30302
Reported By	
Name	* Ira Porter
Relation to Insured	* Supervisor
Injured Worker Name	
Name	* Irma Pseudumac
Injured Worker Social Security #	***-**-1234

Injury	Employment Data	Officials
Injury Description	Crushed between loading machines	
Severity	Death	
Injury / Illness Result in Death?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Cause of Injury / Source	<input checked="" type="radio"/> Caught in, under, or between	
Detailed Cause / Source	Caught in, under, or between machin	
Primary Injury Type	<input checked="" type="radio"/> Multiple injuries	
Detailed Injury Type	<input checked="" type="radio"/> Multiple physical injuries only	
Medical attention required?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Body Part Details (First Entry is Primary Body Part)		
<input type="checkbox"/> Area of Body*	<input type="checkbox"/> Body Part*	<input type="button" value="Add"/>
<input type="checkbox"/> Multiple body parts	Unclassified - insufficient info to properly identify	

Step 4 of 4: Save and Assign Claim

Assignment	
<input checked="" type="radio"/> Assign claim and all exposures to:	<input checked="" type="radio"/> Andy Applegate (Auto1 - TeamA)

Summary

Exposures				
	#	Type	Coverage	Claimant
				Adjuster
	1	Medical Details	Statutory Workers' Comp	Ima Pseumac
	2	Indemnity	Statutory Workers' Comp	Ima Pseumac

Set Reserves

All line items added or changed below will be submitted as a group. Any line item with no change will not be saved. Any line item with Pending Approval reserves that has its New Available reserves will have those Pending Approval reserves deleted. Comments are saved only when another field on the line has changed.

Exposure	Coverage	Cost Type*	Cost Category*	Currently Available	Pending Approval	New Available Reserves*
<input type="checkbox"/> (2) Indemnity	Statutory Workers' Comp	Claim Cost	Death benefits	\$ 20,000.00		\$20,000.00

Step 1 of 3: Enter payee information

Pay To: Ima Pseumac

Check Details

Primary Payee

Name: * Ima Pseumac

Type: * Claimant

Add Joint Payees

Step 2 of 3: Enter payment information

Cancel | **Back**

<input type="checkbox"/> Exposure	Coverage	Cost Type	Cost Category	Amount	Payment Type
<input type="checkbox"/>	(2) Indemnity	Statutory Workers' Comp	Claim Cost	Death benefits	\$10,000.00 Partial
					\$10,000.00

Payment Details

Reserve Line	* <input type="text" value="(2) Indemnity; Claim Cost/Death benefits"/>						
Coverage	Statutory Workers' Comp						
Payment Type	* <input type="text" value="Partial"/>						
Eroding?	* <input checked="" type="radio"/> Yes <input type="radio"/> No						
Available Reserves	\$20,000.00						
Comments	<input type="text"/>						
Line Items	<input type="button" value="Add Item"/> <input type="button" value="Remove"/> <table border="1"> <thead> <tr> <th><input type="checkbox"/> Category</th> <th>Amount*</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Other</td> <td>\$ 10,000.00</td> </tr> <tr> <td></td> <td>\$10,000.00</td> </tr> </tbody> </table>	<input type="checkbox"/> Category	Amount*	<input type="checkbox"/> Other	\$ 10,000.00		\$10,000.00
<input type="checkbox"/> Category	Amount*						
<input type="checkbox"/> Other	\$ 10,000.00						
	\$10,000.00						

Workplan

All open activities	Due	Priority	Status	Subject	Exposures	External	Ext Owner	Assigned By	Assigned To
<input type="checkbox"/> 10/23/2018	Urgent	Open	Review and approve new payment	(2) Indemnity	No	Andy Applegate	Super Visor		

Financials: Checks

Check Number	Pay To	Gross Amount	Issue Date	Scheduled Send Date	Status
	Ima Pseumac	\$10,000.00	10/23/2018		Awaiting submission

Lesson 4

Configuring Vendor Services

ClaimCenter, when integrated with an address book system such as Guidewire ContactManager, allows you to assign services to vendors. This capability is based on two XML files, which control what services are available and the circumstances under which they can be requested.

ClaimCenter also incorporates Straight-Through Invoice Processing (STIP), which allows for the automatic approval and payment of routine invoices without human intervention.

Prerequisites

This lesson assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should be running in debug mode when you start the lab.

4.1 Adding services



Activity

Succeed Insurance needs to add two new services, Interpreter and Negotiator. Both these services should be under a new service category, Personal Services.

They should both be available as the Quote and Service service kind.

They should be available for all incident types.

4.1.1 Lab

1. In Studio, create two new Display Keys:

```
SI.Services.PersonalServices.Description= Personal Services  
SI.Services.PersonalServices.Name = Personal Services  
SI.Services.PersonalServices.Interpreter.Description = Interpreter  
SI.Services.PersonalServices.Interpreter.Name = Interpreter
```

2. In Notepad++, open the file

C:\GW10\ClaimCenter\modules\configuration\config\sampleddata\vendorservicetree.xml

- a) Add a top-level service category called **Personal Services**, with code **pers** and public id **svc:pers**.
- b) As a child of **Personal Services**, add the service called **Interpreter**, with code **interp** and public id **svc:pers_interp**.
- c) Save and close the file.

3. In Notepad++, open the file

C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicedetails.xml

- a) Add **svc:pers_interp** with service kind **quote and service**.
- b) Add **svc:pers** with incident types **Incident, InjuryIncident, VehicleIncident, TripIncident, BaggageIncident, PropertyIncident, DwellingIncident** and **FixedPropertyIncident**.
- c) Save and close the file.

4. Import the changes.

- a) Log in to ClaimCenter as **su/gw**.
- b) Navigate to **Administration ➔ Utilities ➔ Import Data**.
- c) Import the file
C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicetree.xml.
- d) Import the file
C:\GW10\ClaimCenter\modules\configuration\config\sampledata\vendorservicedetails.xml.

4.1.2 Test procedure

1. Log in to ClaimCenter as aapplegate/gw.

2. Navigate to an existing claim, such as the Bill Kinman claim.

3. Add a person vendor to the claim.

- a) Click the **Parties Involved** link.
- b) Select **New Person ➔ Person**.
- c) Give the person a first and last name.
- d) Add the role **Service Vendor** to the person.
- e) Click **Update**.

4. Create a new service on the claim.

- a) Select **Action ➔ New Service**.
- b) For the request type, select **Quote and Perform Service**.
- c) For the vendor name, select the person you created in step 3.
- d) Under Services to Perform, click **Add**.
- e) Verify that there is a Personal Services category, with one service, Interpreter.
- f) Select **Interpreter**.
- g) Choose an address and complete the service.



4.2 Invoices on flagged claims



Activity

Succeed does not want automatic approval to happen for any invoice where the claim is flagged.

Prerequisites

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should be running in debug mode when you start the lab.

4.2.1 Lab

1. Create a display key that reminds the user that the claim is currently flagged.
2. Add a clause to the **InvoiceAutoApprovalHelper** to cover this use case.

4.2.2 Test procedure

3. Navigate to a flagged claim.
 - a) Log on to ClaimCenter as **bbaker/gw**.
 - b) Navigate to the Mark Henderson claim (**235-53-373870**), or any flagged claim.
4. Attempt to create a payment.
 - a) Select **Action ➔ New ➔ Service**.
 - b) Relate it to reserve line (2).
 - c) Make the request type **Quote and Perform Service**.
 - d) Under Services to Perform, select **Glass**.
 - e) Create a new **Vendor (Company)**.
 - f) Fill in details as required.
 - g) Click **Submit**.
 - h) If the Next Action field for the service request reads **Submit Request**, click the link and submit the request.
 - i) In the Details tab of the Services screen, click **Record Vendor Progress ➔ Vendor accepted work**.
 - j) Pick today's date and click **Update**.
 - k) Click **Record Vendor Progress ➔ Vendor completed work**.
 - l) Click **Add invoice**.
 - m) In the Description field, enter **Glass**.
 - n) In the **Add Invoice** screen, select **Labor** for the category and enter **\$95** as the amount.
 - o) Click **Update**.
 - p) Select the **Invoices** tab and observe that the invoice's status is **Waiting for Approval**, and note the Status Reason.
 - q) Click **Approve**.



4.3 Solutions



Solution

Exact details on how to complete the lab.

4.3.1 Adding services

```
<SpecialistService public-id="svc:pers">
  <Active>true</Active>
  <Code>pers</Code>
  <Description>SI.Services.PersonalServices.Description</Description>
  <Name>SI.Services.PersonalServices.Name</Name>
  <Parent/>
</SpecialistService>
<SpecialistService public-id="svc:pers_interp">
  <Active>true</Active>
  <Code>interp</Code>
  <Description>SI.Services.PersonalServices.Interpreter.Description</Description>
  <Name>SI.Services.PersonalServices.Interpreter.Name</Name>
  <Parent>public-id="svc:pers"</Parent>
</SpecialistService>
</import>

<SpecialistServiceCompatibleServiceRequestKind public-id="cc:82">
  <Kind>quoteandservice</Kind>
  <Service public-id="svc:pers_interp"/>
</SpecialistServiceCompatibleServiceRequestKind>
```

```
<SpecialistServiceCompatibleIncidentType public-id="cc:27">
  <IncidentType>InjuryIncident</IncidentType>
  <Service public-id="svc:pers"/>
</SpecialistServiceCompatibleIncidentType>
<SpecialistServiceCompatibleIncidentType public-id="cc:28">
  <IncidentType>VehicleIncident</IncidentType>
  <Service public-id="svc:pers"/>
</SpecialistServiceCompatibleIncidentType>
<SpecialistServiceCompatibleIncidentType public-id="cc:29">
  <IncidentType>TripIncident</IncidentType>
  <Service public-id="svc:pers"/>
</SpecialistServiceCompatibleIncidentType>
<SpecialistServiceCompatibleIncidentType public-id="cc:30">
  <IncidentType>BaggageIncident</IncidentType>
  <Service public-id="svc:pers"/>
</SpecialistServiceCompatibleIncidentType>
<SpecialistServiceCompatibleIncidentType public-id="cc:31">
  <IncidentType>DwellingIncident</IncidentType>
  <Service public-id="svc:pers"/>
</SpecialistServiceCompatibleIncidentType>
<SpecialistServiceCompatibleIncidentType public-id="cc:32">
  <IncidentType>FixedPropertyIncident</IncidentType>
  <Service public-id="svc:pers"/>
</SpecialistServiceCompatibleIncidentType>
</import>
```

Import Administrative Data

Cancel | Next | **Finish**

Please browse for an administrative data file to upload

vendorservicetree.xml

No conflicts were found with existing records. Click "Finish" to complete the import.

Import Administrative Data

Cancel | Next | **Finish**

Please browse for an administrative data file to upload

vendorservicedetails.xml

No conflicts were found with existing records. Click "Finish" to complete the import.

4.3.2 Test procedure

4.3.3 Invoices on flagged claims

```
SI.Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimIsFlagged = The claim is currently flagged
```

```
var failureReasons: List<String> = {}

if (claim.State == ClaimState.TC_CLOSED) {
    failureReasons.add(DisplayKey.get("Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimIsClosed"))
}

if (claim.isCurrentlyFlagged()) {
    failureReasons.add(DisplayKey.get("SI.Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimIsFlagged"))
}

if (claim.SIUStatus == SIUStatus.TC_UNDER_INVESTIGATION) {
    failureReasons.add(DisplayKey.get("Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimHasActiveSIU"))
}
```

4.3.4 Test procedure

Create Service

Related To	*	(2) 3rd Party Vehicle - Richard Jackson
Services to Perform		
<input type="checkbox"/> Category	<input type="checkbox"/> Subcategory	<input type="checkbox"/> Service Type
<input type="checkbox"/> Auto	Inspection / Repair	Glass
Request Type	*	Perform Service
Vendor		
Name	*	Consolidated International
Phone		
Location	3232 32d St, SC 32839	
Communication Method	Guidewire Portal	
Vendor Accepted Work		
Expected Service Completion Date	*	05/09/2018

Add Invoice

Invoice Reference Number: 1234-j

Description: * Glass

Line Items:

Category	Description	Amount
Labor		\$ 95.00

Total: \$95.00

Details

Approve | Reject | Withdraw

Invoice waiting for approval

Invoice Reference Number: 1234-j

Invoice Status: Waiting for Approval

Status Reason: This invoice could not be auto-approved because the Claim is currently flagged.

Submitted Date: 05/02/2018

Lesson 5

Configuring Search

ClaimCenter provides a robust search functionality that can find claims, activities, checks, recoveries, and bulk invoices – as well as vendors, through integration with your address book application (such as Guidewire ContactManager). This capability can be extended to search for existing or custom fields that are not currently searchable.

5.1 Percent complete field



Activity

Succeed Insurance requires a field indicating the percent complete on a claim. This should be a required field. For purpose of upgrading the existing claims, the default value should be 50%.

The field should be searchable in the Claim Search screen. The user inputs a value, and the search engine retrieves claims whose percent field is greater than or equal to that value.

Prerequisites

This lesson assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

ClaimCenter Studio should be running with no components open. ClaimCenter Server should not be running.

5.1.1 Lab

1. Add the `PercentComplete_SI` field to `Claim.etx`.

<code>name</code>	<code>PercentComplete_SI</code>
<code>type</code>	<code>percentagedec</code>
<code>nullok</code>	<code>false</code>
<code>desc</code>	<code>Percentage of claim that is complete</code>
<code>Default</code>	<code>50</code>

2. Add the `PercentComplete_SI` field to `ClaimSearchCriteria.etx`.

Note that the column on the `ClaimSearchCriteria` entity should **not** be required (`nullok = true`).

3. Add a `<Criterion>` element to the `search-config.xml` file.

- Add it to the `ClaimSearchCriteria <CriteriaDef>` whose `targetEntity` is `Claim`.
- The `matchType` should be `ge`.

4. Add a display key for the search label. Place it with the other JSP.ClaimSearch labels in configuration → config → Localizatons → Resource Bundle 'display' → display.properties.
5. Add the PercentComplete_Ext column as a text input on ClaimSearchOptionalInputSet.pcf.
 - a) Place it directly under the LossType input.
 - b) Set the following values:

editable	true
id	Completion
label	DisplayKey.get("JSP.ClaimSearch.Claims.PercentComplete_Ext")
required	false
value	ClaimSearchCriteria.PercentComplete_Ext
valueType	Java.math.BigDecimal

- c) **Note:** In an actual implementation, you would also create one or more fields on the Claim screens where adjusters could input the Percent Complete value, or a mechanism for calculating it.
6. Regenerate the Simple Object Access Protocol (SOAP) APIs.
 - a) Open a command window at **C:/Guidewire/ClaimCenter**.
 - b) Run the command **gwb GenJavaApi**. (This will take about 15 minutes.)
 - c) **Note:** You would normally run the command **gwb GenDataDict**. To save time in the lab we will skip this step, which would take an additional five minutes or more.

5.1.2 Test procedure

1. Start the ClaimCenter server in debug mode.
2. Log in to ClaimCenter as Andy Applegate (aapplegate/gw).
3. Select Search → Claims → Advanced Search.
4. Verify that the Percent Complete field is present.
5. Set the Assigned User criterion to Andy Applegate, and click Search.

How many claims appear?

6. Set the Percent Complete criterion to 55 and click Search.

Now how many claims appear?

7. Finally, set the Percent Complete criterion to 49 and click Search.

How many claims appear?



5.2 Solutions



Solution

Exact details on how to complete the lab.

5.2.1 Percent complete field

Element	Primary Value	Secondary Value
extension	Claim	
> index	claimu6	Covering index for h...
> index	claimu7u	This covering index e...
> index	claimu9	This covering index e...
column	InsuredPremises	bit
column	PercentComplete_SI	percentagedec

Name	Value
name	PercentComplete_SI
type	percentagedec
nullok	false
desc	Percentage of claim that is complete
allowInitialValueForUpgrade	false
autoincrement	
columnName	
createhistogram	false
default	50

ClaimSearchCriteria.etx x search-config.xml x

+ columnParam - Show All

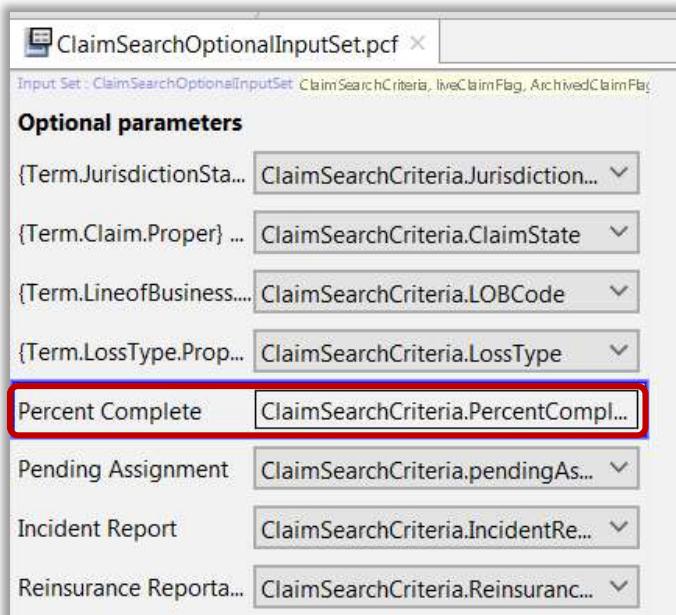
Element	Primary Value	Secondary Value
extension	ClaimSearchCrite...	
column	Fault	percentagedec
column	PercentComplete...	percentagedec
implements	gw.cc.claim.entit...	com.guidewire.c...

Name	Value
name	PercentComplete_SI
type	percentagedec
nullok	true
desc	Percent of claim that is completed

```
<CriteriaDef entity="ClaimSearchCriteria" targetEntity="Claim">

    <Criterion property="ClaimNumber" matchType="eq"/>
    <Criterion property="AssignedToUser" targetProperty="AssignedUser" matchType="eq"/>
    <Criterion property="CreatedByUser" targetProperty="CreateUser" matchType="eq"/>
    <Criterion property="Catastrophe" matchType="eq"/>
    <Criterion property="JurisdictionState" matchType="eq"/>
    <Criterion property="ClaimState" targetProperty="State" matchType="eq"/>
    <Criterion property="LOBCode" matchType="eq"/>
    <Criterion property="LossType" matchType="eq"/>
    <Criterion property="CoverageInQuestion" matchType="eq"/>
    <Criterion property="FlaggedType" targetProperty="Flagged" matchType="eq"/>
    <Criterion property="IncidentReport" matchType="eq"/>
    <Criterion property="LitigationStatus" matchType="eq"/>
    <Criterion property="ReinsuranceReportable" matchType="eq"/>
    <Criterion property="PercentComplete_SI" matchType="ge"/>
```

SI.ClaimSearch.Claims.PercentComplete = Percent Complete



The screenshot shows a configuration interface with two main sections. The top section is a 'Text Input' configuration panel with the following properties:

Text Input	
Basic properties	
editable	true
id*	Completion
label	DisplayKey.get("SI.ClaimSearch.Claims.PercentComplete")
required	false
value*	ClaimSearchCriteria.PercentComplete_SI

The bottom section is a command-line terminal window titled 'Administrator: C:\windows\system32\cmd.exe' showing the output of the 'gwb genjavaapi' command:

```
c:\Guidewire\ClaimCenter>gwb genjavaapi
To honour the JVM settings for this build a new JVM will be forked. Please consider using the daemon: https://docs.gradle.org/4.3.1/userguide/gradle_daemon.html
.
Daemon will be stopped at the end of the build stopping after processing
Parallel execution is an incubating feature.

> Configure project : . . .
```

Below this, another terminal window shows the build results:

```
> Task :modules:configuration:genJavaApi
Java API files are generated in C:\Guidewire\ClaimCenter\java-api

BUILD SUCCESSFUL in 14m 37s
14 actionable tasks: 14 executed
c:\Guidewire\ClaimCenter>_
```

5.2.2 Test procedure

1. Start the ClaimCenter server in debug mode.
2. Log in to ClaimCenter as Andy Applegate (aapplegate/gw).
3. Select Search → Claims → Advanced Search.
4. Verify that the Percent Complete field is present.

Optional parameters

Jurisdiction	<none>
Claim Status	<none>
Line of Business	<none>
Loss Type	<none>
Percent Complete	
Pending Assignment	<none>
Incident Report	<none>
Reinsurance Reportable	<none>

- 5. Set the Assigned User criterion to Andy Applegate, and click Search.**

How many claims appear?

6 (may vary depending on how many claims you have created))

- 6. Set the Percent Complete criterion to 55 and click Search.**

Now how many claims appear?

0

- 7. Finally, set the Percent Complete criterion to 49 and click Search.**

How many claims appear?

6 (or whatever you saw for question #5)

Lesson 6

Configuring Claim History

ClaimCenter provides a history functionality that tracks important events and actions related to each claim. Insurers can also add new event and action types to track anything of importance. Since the history records are not editable, they stand as defensible records of actions taken on a claim.

6.1 Track changes to salvage status field



Activity

Succeed Insurance requires change tracking to the Salvage Status field.

- You may use the existing Data Change custom history type or create a new one.
- The description should provide both the “from” and “to” values of the field.

Prerequisites

This lesson assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should be running in debug mode when you start the lab.

6.1.1 Lab

1. Add a typecode to the CustomHistoryType typelist (optional)

code	SI_SalvageStatusChanged
name	Salvage Status Changed
desc	Salvage Status changed

2. Add a Claim Preupdate rule to write the records.

- d) Name it **CPU00500 – Salvage status change history**
- e) Use the **isFieldChanged()** and **getOriginalValue()** functions.

6.1.2 Test procedure

1. Reload changed classes (or restart ClaimCenter server).
2. Log in to ClaimCenter as aapplegate/gw.
3. Navigate to the Bill Kinman claim (235-53-425891).
4. In the sidebar, select Summary → Status.
5. Click Edit.
6. Change the Salvage Status field to In review.

7. Click Update.
8. In the sidebar, select History.
9. Verify that the “Salvage status changed” entry is present at the top of the History list.



6.2 Solutions



Solution

Exact details on how to complete the lab.

6.2.1 Track changes to salvage status field

Element	Code	Name	Priority	Name	Value
typeListExtension	CustomHistoryType	Custom history eve...		code	SI_SalvageStatusChanged
typecode	a_n_f_r	Auto: No fault rating	-1	name	Salvage Status Changed
typecode	e_w_n_r	Exposure with no re...	-1	desc	Salvage Status Changed
typecode	Export	Exported to mainfra...	-1	identifierCode	
typecode	DataChange	Data change	-1	priority	-1
typecode	create_recovery_bill	Create recovery bill	-1	retired	false
typecode	catastrophe	Guidewire catastrop...	-1		
typecode	email	Email sent	-1		
typecode	warning	Warning	-1		
typecode	SI_SalvageStatusC...	Salvage Status Cha...	-1		

```

1 USES:
2
3 CONDITION (claim : entity.Claim);
4 return claim.isFieldChanged(Claim#SalvageStatus)
5 ACTION (claim : entity.Claim, actions : gw.rules.Action):
6   claim.createCustomHistoryEvent
7     (CustomHistoryType.TC_SI_SALVAGESTATUSCHANGED,
8      "Salvage status changed from " +
9      claim.getOriginalValue(Claim#SalvageStatus).DisplayName +
10     " to " + claim.SalvageStatus.DisplayName + ".")
11
12 END

```

6.2.2 Test procedure

Claim Validation Level	Ability to pay
Salvage Status	In review

History				
Type	Related To	User	Event Time Stamp	Description
Salvage status changed	Entire claim	Andy Applegate	05/09/2018 11:48 AM	Salvage status changed from null to In review.

Lesson 7

Configuring Permissions

ClaimCenter provides a base set of permissions which control access to the application's various functions. This functionality is configurable, allowing you to change the applicability of existing permissions and add new permissions to control access to new (or existing) functionality.

7.1 Limit ability to remove Metro Reports



Activity

At Succeed Insurance, only supervisors may remove metro reports from claims.

The base application allows all users to remove the reports. You need to make the appropriate configurations so that supervisors may remove metro reports from claims, but adjusters cannot.

Prerequisites

This lesson assumes that you have successfully completed the ClaimCenter Configuration Kickstart course.

For this lab, you will use ClaimCenter 10.0 and a supported web browser.

ClaimCenter Server should **not** be running when you start the lab.

7.1.1 Lab

1. Create a custom permission which will be used to control a user's ability to remove metro reports.

code	SI_metrodel
name	Delete metro reports
desc	Permission to delete metro reports

2. Modify the user interface so that the Remove button at the top of the metro report is visible only to users with the new permission. (To save time, do this only for auto claims.)
3. Start ClaimCenter in debug mode.
4. Log in as admin/gw.
5. Add the new permission to the Claims Supervisor role.
6. Log out.

7.1.2 Test procedure

1. Log in as aapplegate/gw.
2. Navigate to the Allen Robertson claim (235-53-365871).
3. In the sidebar, click Loss Details.

4. Click Edit.
5. Verify that the Remove button is not visible for the Metropolitan Reports table.
6. Click Cancel and log out.
7. Log in as ssmith/gw, Andy Applegate's supervisor.
8. Navigate to the Allen Robertson claim (235-53-365871).
9. Click Loss Details.
10. Click Edit.
11. Verify that the Remove button is visible for the Metropolitan Reports table.
12. Click Cancel and log out.

7.2 Bonus task



Activity

Regenerate the Security Dictionary *from the user interface* (not the command line) and view the permission you created.



7.3 Solution



Solution

Exact details on how to complete the lab.

7.3.1 Limit ability to remove Metro Reports

The figure consists of three screenshots illustrating the configuration steps:

- SystemPermissionType.ttx:** A screenshot of the ClaimCenter configuration interface showing the definition of a new permission type. The table below shows the configuration details.

Element	Code	Name	Priority	Name	Value
typecode	SI_metrodel	Delete metro reports	-1	code	SI_metrodel
typecode	internaltools	All internal tools	-1	name	Delete metro reports
typecode	toolsInfoview	View Info tools page	-1	desc	Permission to delete metro reports

- LossDetailsDV.Auto.pcf:** A screenshot of the ClaimCenter configuration interface showing the modification of a list view. The "Actions" column contains a "Remove" button, which is highlighted with a red box. Below the table, the iterator configuration is shown.

{Term.Type.Proper}	{Term.Status.Proper}	Order Date	Document	Actions
MetroReport.MetroReportType	MetroReport.Status	.../...	MetroReport.Document.Name	Link Cell : Action Resubmit

```

Iterator Buttons
Basic properties
addVisible
id
iterator* MetroReportsLV.MetroReportsLV
removeVisible perm.System.SI.metrodel
  
```

- Iterator Buttons:** A detailed view of the iterator configuration for the "Actions" column. It shows the iterator name as "iterator*" and its value as "perm.System.SI.metrodel".

The screenshot shows the 'Claims Supervisor' role configuration page. At the top right, there is a green 'Edit' button with a red box around it. Below the title, there are tabs for 'Basics' and 'Users'. The 'Basics' tab is selected. Under the 'Role' section, the 'Name' is set to 'Claims Supervisor' and the 'Description' is 'Base permissions for a claims supervisor'. At the bottom of this section, there is a green 'Add' button with a red box around it, and a 'Remove' button.

Action	Permission	Description
<input type="checkbox"/>	Close matters	mttrclose Permission to close matters on a claim
<input type="checkbox"/>	Create activities	actcreate Permission to create new activities
<input type="checkbox"/>	Create activities on closed claim	actcreateclsd Permission to create a new activity associated with a closed claim
<input type="checkbox"/>	Delete address book preferred vendors	abcreate Permission to create a new contact in the address book
<input type="checkbox"/>	Delete documents	bulkinvcreate Permission to create bulk invoices
<input type="checkbox"/>	Delete documents on closed claim	claimcreate Permission to create a new claim
<input type="checkbox"/>	Delete groups	anytagcreate Permission to create a new contact regardless of which tag(s) are assigned
<input type="checkbox"/>	Delete medical note	doccreate Permission to add documents
<input type="checkbox"/>	Delete metro reports	doccreateclsd Permission to add documents to a closed claim
<input type="checkbox"/>	Delete organization	evalcreate Permission to create an evaluation on a claim
<input type="checkbox"/>	Delete private note	expcreate Permission to create a new exposure
<input type="checkbox"/>	Delete sensitive note	ctccreate Permission to create a new local contact
<input type="checkbox"/>	Delete users	manpaycreate Permission to create manual payment transactions
<input type="checkbox"/>	Deploy Activity Rule	
<input type="checkbox"/>	Deploy Exposure Rule	
<input type="checkbox"/>	Deploy Reserve Rule	
<input type="checkbox"/>	Deploy Rule	
<input type="checkbox"/>	Edit activity pattern	
<input type="checkbox"/>	Edit Activity Rule	
<input type="checkbox"/>	Edit address book preferred vendors	
<input type="checkbox"/>	Edit BatchProcess tools page	
<input type="checkbox"/>	Edit Cluster tools page	
<input type="checkbox"/>	Edit Exposure Rule	
<input type="checkbox"/>	<none>	

7.3.2 Test procedure

ClaimCenter™

Username

Password

Log In

(Pol: 54-253465 | Ins: Allen Robertson DoL: 01/13/2018 | St: Open | Adj: Andy Applegate (Auto1 - TeamA)

Loss Details

Reported By [Ray Newton](#)

Edit

Metropolitan Reports		Add		
Type	Status	Order Date	Document	Actions
<input type="checkbox"/> Registration Check/DMV	Received		RegistrationCheckDMV3OCQYM0001.tif	Resubmit
<input type="checkbox"/> Auto Accident	Received		AutoAccident3OCQYM0000.tif	Resubmit

ClaimCenter™

Username

Password

Log In

Metropolitan Reports		Add	Remove	
Type	Status	Order Date	Document	Actions
<input type="checkbox"/> Registration Check/DMV	Received		RegistrationCheckDMV3OCQYM0001.tif	<button>Resubmit</button>
<input type="checkbox"/> Auto Accident	Received		AutoAccident3OCQYM0000.tif	<button>Resubmit</button>

7.3.3 Bonus task

SI_metrodel (static) - Delete metro reports

► Description

Roles

Claims Supervisor
Base permissions for a claims supervisor

Related Elements

IteratorButtons removeVisible attribute
[LossDetailsDV.Auto](#) (LossDetailsDV.Auto.pcf)

Lesson 8

Business Activity Rules

Succeed Insurance wants all claims resulting from the 2003 Los Angeles (LA) earthquake to be attributed to that catastrophe recorded in ClaimCenter.

They want to assign inspection activities to a special field adjusters group named “LA Property Adjusters” for all activity related to the 2003 earthquake.

Succeed has an existing activity pattern for inspection activities named Get property inspected which they want to use for any catastrophe-based activity rules.

There should be only one activity created for each claim.

The new activities should only apply to Property losses in California with policy types of Commercial Property, Farmowners, or Homeowners.

The activity completion target is three (3) days and should be escalated if it is not complete within five (5) days.

Prerequisites

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

ClaimCenter Server should be running when you start the exercise.

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

Log in to ClaimCenter as Ursula Seradmin to create the rule. The login/password is `useradmin/gw`.

For testing, you will log in to ClaimCenter as aapplegate. The login/password for aapplegate is `aapplegate/gw`.

8.1 Lab: Catastrophe rule



Activity

Determine the specifics needed for creating a business activity rule.

8.1.1 Lab

1. Create the rule.

- a) Log in to ClaimCenter as Ursula Seradmin (`useradmin/gw`).
- b) Create a business activity rule called **LA Earthquake** that triggers on the creation or update of a claim.
- c) The rule should apply to Property losses for Commercial Property, Farmowners, or Homeowners policy types in California.

2. Set the Rule Condition.

- a) What two rule conditions are called for in the requirements?

- b) Set the conditions in the Rule Condition table.



Hints

How can I check this condition?

Some Gosu features that might be useful:

- Claim has a Catastrophe property, and the Catastrophe has a Name property.
- The name of the catastrophe in ClaimCenter is “LA earthquake”.
- Claim has an **AssignedByUser** property which has a Contact property. The Contact has a LastName property, which is a String.
- The last name of your user is StudentXX, where XX is your student number.

3. Set the Rule Action

- a) What is the rule supposed to do?

b) Add an action that accomplishes this.
c) Make sure that the new activity is assigned to the LA Property Adjusters group.
d) Change the Target Date Days to 3 and the Escalation Date Days to 5 to reflect the urgency of this activity.
e) Make sure this rule will create only one activity on this claim.

4. Log out of ClaimCenter as useradmin and log in as aapplegate/gw.

8.1.2 Test procedure

5. Using the New Claim Wizard, create a new claim that will test the activity rule you just created.

- a) Search for a policy for “Worthy Farmer’s Supply.”
- b) The Loss Date must be between 09/06/2003 and 09/11/2003, resulting in a “Coverage in Question” flag. This is OK for this test.
- c) Select either policy property.
- d) Jim Caron is an employee reporting the claim.
- e) If there are duplicate claims, you can close the warning worksheet and ignore them.
- f) The Loss Cause should be Earthquake and the Catastrophe should be the LA earthquake.
- g) The Loss Location can either of the Greens Road properties.
- h) Assign the claim to yourself (**aapplegate**) and create the claim.

6. In the sidebar, click Workplan

- a) Verify that the activity has been created.
- b) Verify that it has been assigned to the LA Property Adjusters group.



8.2 Solution



Solution

Exact details on how to complete the lab.

8.2.1 Catastrophe rule

New Activity Rule [Up to Activity Rules](#)

Last Edited by useradmin on 10/24/2018.

Name	* <input type="text" value="LA Earthquake"/>
Description	Create inspection activity for property claims affected by the LA earthquake
Trigger Entity	* <input type="text" value="Claim"/> Rule executes for a Claim. Available Symbols: claim
Trigger Action	* <input type="text" value="Update"/>
Enabled	* <input checked="" type="radio"/> Yes <input type="radio"/> No Rule will run in this environment.

Applies To

Loss Type All Selected

Auto
Liability
Travel
Workers' Comp

>
<

Property

Policy Type All Selected

Businessowners
Commercial Auto
Commercial Package
General Liability

>
<

Commercial Property
Farmowners
Homeowners

Claim Jurisdiction All Selected

A.C.T.
Alabama
Alaska
Alberta

>
<

California

Rule Variables

Add	Remove	Name	Description	Expression	Type
No data to display					

Rule Condition

Display Rule Conditions Yes No

* None All of the following criteria must be true (AND) At least one of the following criteria must be true (OR) The following combination of criteria must evaluate to true (AND/OR)

Add	Insert	Remove	↑	↓	Hide Formatted View	Context Help (ALT-H)
<input type="checkbox"/>	Left Expression		Operation		Right Expression	
<input type="checkbox"/>	claim.Catastrophe.Name	<input type="button" value="▼"/>	=	<input type="button" value="▼"/>	"LA earthquake"	<input type="button" value="▼"/>

claim.Catastrophe.Name = "LA earthquake"

Actions

Add Action	Remove Action	1	↓
<input type="checkbox"/>	Sequence	Action Type	Description
<input checked="" type="checkbox"/> 1	Generate Activity	Activity Pattern : property_inspection	

Parameters

Action Type	Generate Activity		
Activity	Activity Pattern: Get property inspected Related To: Claim Assigned To: Group Group: LA Property Adjusters Additional Restriction: No duplicate Activity on Claim Priority: Normal Calendar Importance: Not On Calendar Subject (Text): Get property inspected Description (Text): Inspect property affected by the LA Earthquake		
Target Date	Days (Formula): 3 Hours (Formula): 0 Start Point: Activity creation date Include Days: Business days		

8.2.2 Test procedure

Workplan

All open activities						
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Due	Priority	
				Status	Subject	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10/25/2018	Urgent	Open Make initial contact with insured
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10/26/2018	High	Open Review coverage in question
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10/29/2018	Normal	Open Get property inspected
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/23/2018	Normal	Open Initial 30 day file review

Activity

Activity Detail for Claim 000-00-000503

Assign	View Notes	Close Worksheet																																																																										
<table border="1"> <thead> <tr> <th colspan="2">Details</th> <th colspan="2">Activity Assignment</th> </tr> </thead> <tbody> <tr> <td>Subject</td> <td>Get property inspected</td> <td>Assigned To</td> <td>James Dole</td> </tr> <tr> <td>Description</td> <td>Inspect property affected by the LA Earthquake</td> <td>Assigned Group</td> <td>LA Property Adjusters</td> </tr> <tr> <td>Related To</td> <td>Claim</td> <td>Assigned By</td> <td>Andy Applegate</td> </tr> <tr> <td>Due Date</td> <td>10/29/2018</td> <td>Assign Date</td> <td>10/24/2018</td> </tr> <tr> <td>Escalation Date</td> <td>11/14/2018</td> <td colspan="2"> <table border="1"> <thead> <tr> <th colspan="6">Documents</th> </tr> <tr> <th>Name</th> <th>Actions</th> <th>Document Type</th> <th>Status</th> <th>Author</th> <th>Uploaded</th> </tr> </thead> <tbody> <tr> <td colspan="6">No data to display</td> </tr> </tbody> </table> </td> </tr> <tr> <td>Priority</td> <td>Normal</td> <td colspan="2"> <table border="1"> <thead> <tr> <th colspan="2">Activity Tracking</th> </tr> </thead> <tbody> <tr> <td>Completion/Skipped date</td> <td></td> </tr> <tr> <td>Completed by</td> <td></td> </tr> <tr> <td>Recurring</td> <td>No</td> </tr> </tbody> </table> </td> </tr> <tr> <td>Calendar Importance</td> <td>Not On Calendar</td> <td colspan="2"></td> </tr> <tr> <td>Mandatory</td> <td>No</td> <td colspan="2"></td> </tr> <tr> <td>Status</td> <td>Open</td> <td colspan="2"></td> </tr> <tr> <td>Externally Owned</td> <td>No</td> <td colspan="2"></td> </tr> <tr> <td>External Owner</td> <td></td> <td colspan="2"></td> </tr> </tbody> </table>			Details		Activity Assignment		Subject	Get property inspected	Assigned To	James Dole	Description	Inspect property affected by the LA Earthquake	Assigned Group	LA Property Adjusters	Related To	Claim	Assigned By	Andy Applegate	Due Date	10/29/2018	Assign Date	10/24/2018	Escalation Date	11/14/2018	<table border="1"> <thead> <tr> <th colspan="6">Documents</th> </tr> <tr> <th>Name</th> <th>Actions</th> <th>Document Type</th> <th>Status</th> <th>Author</th> <th>Uploaded</th> </tr> </thead> <tbody> <tr> <td colspan="6">No data to display</td> </tr> </tbody> </table>		Documents						Name	Actions	Document Type	Status	Author	Uploaded	No data to display						Priority	Normal	<table border="1"> <thead> <tr> <th colspan="2">Activity Tracking</th> </tr> </thead> <tbody> <tr> <td>Completion/Skipped date</td> <td></td> </tr> <tr> <td>Completed by</td> <td></td> </tr> <tr> <td>Recurring</td> <td>No</td> </tr> </tbody> </table>		Activity Tracking		Completion/Skipped date		Completed by		Recurring	No	Calendar Importance	Not On Calendar			Mandatory	No			Status	Open			Externally Owned	No			External Owner			
Details		Activity Assignment																																																																										
Subject	Get property inspected	Assigned To	James Dole																																																																									
Description	Inspect property affected by the LA Earthquake	Assigned Group	LA Property Adjusters																																																																									
Related To	Claim	Assigned By	Andy Applegate																																																																									
Due Date	10/29/2018	Assign Date	10/24/2018																																																																									
Escalation Date	11/14/2018	<table border="1"> <thead> <tr> <th colspan="6">Documents</th> </tr> <tr> <th>Name</th> <th>Actions</th> <th>Document Type</th> <th>Status</th> <th>Author</th> <th>Uploaded</th> </tr> </thead> <tbody> <tr> <td colspan="6">No data to display</td> </tr> </tbody> </table>		Documents						Name	Actions	Document Type	Status	Author	Uploaded	No data to display																																																												
Documents																																																																												
Name	Actions	Document Type	Status	Author	Uploaded																																																																							
No data to display																																																																												
Priority	Normal	<table border="1"> <thead> <tr> <th colspan="2">Activity Tracking</th> </tr> </thead> <tbody> <tr> <td>Completion/Skipped date</td> <td></td> </tr> <tr> <td>Completed by</td> <td></td> </tr> <tr> <td>Recurring</td> <td>No</td> </tr> </tbody> </table>		Activity Tracking		Completion/Skipped date		Completed by		Recurring	No																																																																	
Activity Tracking																																																																												
Completion/Skipped date																																																																												
Completed by																																																																												
Recurring	No																																																																											
Calendar Importance	Not On Calendar																																																																											
Mandatory	No																																																																											
Status	Open																																																																											
Externally Owned	No																																																																											
External Owner																																																																												