



# ClaimCenter 10 Introduction: Kickstart

# Student Workbook

*Labs and Tutorials*

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# 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](mailto: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.**

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## 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

# Claims Process

There are no labs for this lesson.

## Lesson 2

# Claim Maintenance

### 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>.



### Important!

For this lab, every student will use the same user login. Therefore, do not modify any data.  
Never click an Update button!

## 2.1 Lab: Claim investigation



### Activity

In this Lab, you will answer questions about basic claim file information.

1. Log on to ClaimCenter as Andy Applegate( user: aapplegate, password: gw)
2. Using the claim search widget in the Claim tab's menu, navigate to claim 235-53-365870.  
Answer the following questions about the claim file.
3. On what date did the policy become effective? On what date does the policy expire?
4. Does the date of loss occur on a date when the policy was in effect?
5. There are two people covered on the policy. Is either one of them a claimant on the claim?
6. Which of the following best describes the cause of the loss?
  - a) Collision with a stationary object
  - b) Collision with a pedestrian
  - c) Collision with motor vehicle
7. How many exposures does the claim have?

- 8. The first exposure is associated with the claimant Ray Newton and collision coverage. What is the incident associated with this exposure?**
- 9. On this claim, which open activity has the earliest due date?**
- 10. How many documents are associated with the claim?**
- 11. According to the notes, which party believes it is at fault, the insured driver or the third-party claimant?**
- 12. How much money is being reserved for payments that might need to be made on the claim?**
- 13. What is the total amount of money that has been paid so far on the claim?**
- 14. To which user has the claim been assigned? Which group?**
- 15. Have exposures on this claim been assigned to multiple users? If so, who?**
- 16. When you are done, log out of ClaimCenter.**

## 2.2 aaSolution: Claim investigation



### Solution

- 1. Log on to ClaimCenter as Andy Applegate( user: aapplegate, password: gw)**
- 2. Using the claim search widget in the Claim tab's menu, navigate to claim 235-53-365870.**
- 3. On what date did the policy become effective? On what date does the policy expire?**

*These dates will vary based on time of install. The policy effective dates can be found on the policy screen.*

- 4. Does the date of loss occur on a date when the policy was in effect?**

*Yes*

- 5. There are two people covered on the policy. Is either one of them a claimant on the claim?**

*Yes, both are. Ray Newton is the insured and a claimant for the Collision exposure and Stan Newton is an additional insured/covered party and a claimant for Medical Payments.*

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**6. Which of the following best describes the cause of the loss?**

- a) Collision with a stationary object
- b) Collision with a pedestrian
- c) *Collision with motor vehicle*

**7. How many exposures does the claim have?**

*Four*

**8. The first exposure is associated with the claimant Ray Newton and collision coverage. What is the incident associated with this exposure?**

*1997 Saturn SL*

**9. On this claim, which open activity has the earliest due date?**

*The activity to determine the fault rating. There is also a general reminder that does not have a due date.*

**10. How many documents are associated with the claim?**

*Five*

**11. According to the notes, which party believes it is at fault, the insured driver or the third-party claimant?**

*Neither party believes they are at fault. Both stated they had a green light.*

**12. How much money is being reserved for payments that might need to be made on the claim?**

*\$16,400*

**13. What is the total amount of money that has been paid so far on the claim?**

*\$2000*

**14. To which user has the claim been assigned? Which group?**

*Andy Applegate, in group Auto1 - TeamA*

**15. Have exposures on this claim been assigned to multiple users? If so, who?**

**ClaimCenter 10 Introduction: Kickstart - Student Workbook**

*Yes. Andy Applegate and Carla Levitt.*

## Lesson 3

# Organizational Structure

### 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>.



### Important!

For this lab, every student will use the same user login. Therefore, do not modify any data.  
Never click an Update button!

## 3.1 Lab: Users and Groups



### Activity

1. Log on to ClaimCenter as Admin (user: admin, password: gw).
2. What is Warren Motley's job?
3. The claims that Warren works with are in what line of business (auto, property, liability, workers' comp)?
4. How many Activities are assigned to Warren?
5. Does the Property – TeamA group handle simple, typical, or complicated claims?
6. If claims assigned to the Property – TeamA group are then assigned to users using round robin:
  - a) Will the supervisor of the group have any claims assigned to him or her?

- b) Will the non-supervisor members of the group get an equal number of claims assigned to them?
- 7. Does the Property – TeamA group cover Arizona (state abbreviation is AZ)?**
- 8. What group does Sue Smith belong to?**
- 9. Will she be assigned claims assigned to this group?**
- 10. What States does the Dallas Claim Center serve?**
- 11. How many adjusters are there in the Sacramento Claims Center?**
- 12. What types of claims do those adjusters handle?**
- 13. What regions are assigned to the Sacramento Property Adjusters?**
- 14. Can Andy Applegate create a payment that is \$1100 over the available reserves without a supervisor's approval?**
- 15. Log out of ClaimCenter.**

## 3.2 Solution: Users and Groups



### Solution

1. Log on to ClaimCenter as Admin (user: admin, password: gw).
2. What is Warren Motley's job?

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*He is a claims supervisor. (He has the Claims Supervisor and Trusted for Sensitive Claims roles.)*

- 3. The claims that Warren works with are in what line of business (auto, property, liability, workers' comp)?**

*Warren works with workers' comp claims. (He is assigned to the Comp - TeamA group.)*

- 4. How many Activities are assigned to Warren?**

*Three*

- 5. Does the Property – TeamA group handle simple, typical, or complicated claims?**

*Complicated claims (The group type is "Property - complex").*

- 6. If claims assigned to the Property – TeamA group are then assigned to users using round robin:**

*a) Will the supervisor of the group have any claims assigned to him or her?*

*Yes, he is a member of the group.*

*b) Will the non-supervisor members of the group get an equal number of claims assigned to them?*

*Yes, the load factor is the same for everyone.*

- 7. Does the Property – TeamA group cover Arizona (state abbreviation is AZ)?**

*Yes. The group covers the "Western Region", which includes Arizona.*

- 8. What group does Sue Smith belong to?**

*Auto1 - TeamA*

- 9. Will she be assigned claims assigned to this group?**

*No*

- 10. What States does the Dallas Claim Center serve?**

*AR, LA, OK, TX*

- 11. How many adjusters are there in the Sacramento Property Adjusters?**

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3 (Harry Dienstfrey, Paulette Flores, Becky Hearst)

**12. What types of claims do those adjusters handle?**

*Property - Complex*

**13. What regions are assigned to the Sacramento Property Adjusters?**

*None*

**14. Can Andy Applegate create a payment that is \$1100 over the available reserves without a supervisor's approval?**

*No – Authority limits allow only up to \$1000 over reserves.*

**15. Log out of ClaimCenter.**

## Lesson 4

# Line of Business and Coverage

### 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>.



### Important!

For this lab, every student will use the same user login. Therefore, do not modify any data.  
Never click an Update button!

## 4.1 Lab: Examine a personal auto claim



### Activity

1. Log on to ClaimCenter as Andy Applegate (aapplegate / gw).
2. Examine the Karen Egertson claim, claim number 235-53-425892.
3. What type of policy does Karen have?
  
4. Does she have any vehicles specified on the policy and what make?
  
5. What coverages does the policy have?
  
6. How does this policy type affect claims that may be filed against this policy?
  
7. What is the loss cause for this claim?  
  
Examine the exposures for this claim.
8. What are the coverage and coverage subtypes for the Collision Exposure?

## 4.2 Solution: Examine a personal auto claim



### Solution

1. Log on to ClaimCenter as Andy Applegate (aapplegate / gw).
2. Examine the Karen Egertson claim, claim number 235-53-425892.
3. What type of policy does Karen have?

*Personal auto*

4. Does she have any vehicles specified on the policy and what make?

*Yes. Pontiac*

5. What vehicle coverages are on this policy?

*Collision, Comprehensive, Liability – Bodily Injury and Property Damage, and Medical Payments*

6. How does this policy type affect claims that may be filed against this policy?

*Loss cause is restricted to causes that make sense for an auto type policy. (part of configuration)*

7. What is the loss cause for this claim?

*Collision with motor vehicle*

Examine the exposures for this claim.

8. What are the coverage and coverage subtypes for the Collision Exposure?

*Collision and Collision*

## 4.3 Lab: Examine a homeowners claim



### Activity

As Andy Applegate, you examine a homeowner's claim.

1. Using the Claim dropdown, open claim number 426-24-300180.
2. What kind of policy is it?
3. What is the address of the insured location?
4. What is the loss cause?

5. What is the Coverage type for the exposure?
  
6. What is the Coverage Subtype for the exposure?

## 4.4 Solution: Examine a homeowners claim



### Solution

1. Using the Claim dropdown, open claim number 426-24-300180.
2. What kind of policy is it?  
*Homeowners*
3. What is the address of the insured location?  
425 Madison St., Chicago, IL 60606
4. What is the loss cause?  
Water damage
5. What is the Coverage type for the exposure?  
Coverage A - Dwelling
6. What is the Coverage Subtype for the exposure?  
Coverage A – Dwelling

## Lesson 5

# Claim Intake

### 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: Claim intake investigation



#### Activity

In this lab, you will answer questions about the claim intake process.

For each of the lists below, circle the one item that does NOT belong in the list.

- 1. Incidents that could be on a claim:**
  - a) A property
  - b) A third-party liability coverage
  - c) A vehicle
  - d) An injury suffered by an individual
- 2. Information typically gathered about the loss during claim intake:**
  - a) Details about the item that was damaged or lost
  - b) Details about the loss event itself
  - c) The amount for the checks to be issued
  - d) The policy which covers the loss
  - e) The people involved in the loss
- 3. Tasks accomplished by business rules during automated claim setup:**
  - a) Assignment of the activities for the claim
  - b) Assignment of the claim
  - c) Creation of the activities for the claim
  - d) Creation of the incidents for the claim

- e) Segmentation of the claim
- 4. Ways in which a First Notice of Loss is entered into ClaimCenter:**
- a) Manually by a ClaimCenter user
  - b) Through an integration point with an FNOL system
  - c) Through an integration point with the Policy Administration system

## 5.2 Solution: Claim intake investigation



### Solution

- 1. Incidents that could be on a claim:**
  - a) A property
  - b) *A third-party liability coverage*
  - c) A vehicle
  - d) An injury suffered by an individual
- 2. Information typically gathered about the loss during claim intake:**
  - a) Details about the item that was damaged or lost
  - b) Details about the loss event itself
  - c) *The amount for the checks to be issued*
  - d) The policy which covers the loss
  - e) The people involved in the loss
- 3. Tasks accomplished by business rules during automated claim setup:**
  - a) Assignment of the activities for the claim
  - b) Assignment of the claim
  - c) Creation of the activities for the claim
  - d) *Creation of the incidents for the claim*
  - e) Segmentation of the claim
- 4. Ways in which a First Notice of Loss is entered into ClaimCenter:**
  - a) Manually by a ClaimCenter user
  - b) Through an integration point with an FNOL system
  - c) *Through an integration point with the Policy Administration system*

## 5.3 Lab: Claim intake

In this lab, you create a claim for an individual who has a policy with Succeed Insurance.

Note: Your instructor will assign you a two-digit number. Whenever you see an italicized "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*".



### Activity

1. Log on to ClaimCenter as studentXX with a password of "gw".
2. What is the name of the user with user ID studentXX? \_\_\_\_\_
3. 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.
- Do not create any exposures or services for the claim.
- Create vehicle incidents for every damaged vehicle and detail the driver of the vehicles.
- Do not enter a damage description for Kevin Smith's car.
- 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.

**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.

### 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.

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.

The other vehicle was a 2002 Ford Fiesta with a Michigan license plate of 223RFT. It was driven by Michael CashmanXX. He lives at 713 Leith Avenue, Waukegan, Illinois, 60087. His cell phone number is (312) 343-2909.

The left side of the other car is fairly smashed up, including damage to the driver-side door.

Mr. CashmanXX also hit his head against the steering wheel. He was taken to the hospital and diagnosed with a minor 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.

## 5.4 Solution: Claim intake



### Solution

2. What is the name of the user with user ID studentXX?

*Sam TudentXX*

3. Screenshots from entering the claim based on the transcript:

The screenshot shows the 'Step 2 of 5: Basic information' screen of the Guidewire ClaimCenter application. At the top, it displays the policy number (Pol: 123456-99), insured (Ins: Kevin Smith99), and date (Dol: 08/19/2018). The form is divided into several sections:

- Reported By:** Fields for How Reported (Phone), Name (Kevin Smith99), Relation to Insured (Self/Insured), Date of Notice (08/20/2018), Verify Date of Birth, Date of Birth, and Confirm Contact Info (Address: 1024 Glenwood Avenue, Waukegan, IL 60085, Work Phone, Home Phone: 312-336-6210, Mobile: 650-333-3333, Primary Phone: Home, Email: KJSmith@kmail.com). There is an 'Edit Contact' button.
- Involved Vehicle(s):** A table showing two vehicles:

Vehicle Type	Description	Limit
Collision	2002 Mini Cooper (4FRT299 / Illinois)	\$500.00 Deductible; \$15,000.00 Limit
Comprehensive	2004 Honda Civic (1JXZ199 / Illinois)	\$500.00 Deductible; \$10,000.00 Limit
- Insured:** Fields for Name (Kevin Smith99), Address (1024 Glenwood Avenue, Waukegan, IL 60085), and Primary Phone (312-336-6210).

At the bottom right are 'Cancel', 'Back', and 'Next' buttons.

Pol: 123456-99 Ins: Kevin Smith99 DoL: 08/19/2018

### Step 3 of 5: Add claim information

What Happened?	<p>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</p>		
Loss Date	08/19/2018 12:01 AM		
Loss Cause	<input checked="" type="radio"/> Collision with motor vehicle		
Incident Only?	<input type="checkbox"/>		
Location	<input checked="" type="radio"/> New... United States McAree Road and Grand Avenue		
Country			
Address 1			
Address 2			
Address 3			
City	<input checked="" type="radio"/> Waukegan		
County			
State	<input checked="" type="radio"/> Illinois		
ZIP Code	# #####		
Location Description			
Location Code			
Jurisdiction	Illinois		

Vehicles, People, & Property

- Add Vehicle
- Add Pedestrian
- Add Property Damage

<b>2004 Honda Civic</b> Illinois 1JXZ199 <b>Occupants</b> Kevin Smith99
<b>2002 Ford Fiesta</b> Michigan 223RFT Left side fairly smashed up, including damage to the driver-side door. <b>Occupants</b> Michael Cashman

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Pol: 123456-99 Ins: Kevin Smith99 Dol: 08/19/2018

Step 4 of 5: Services

Involved Vehicles

The services will be requested when the wizard is completed.

2004 Honda Civic

Rental (No Coverage)

Towing (No Coverage)

Appraisal

Auto Body Repair

Other Services

2002 Ford Fiesta

Left side fairly smashed up, including damage to the driver-side door.

Rental (No Coverage)

Towing (No Coverage)

Appraisal

Auto Body Repair

Other Services

Cancel | Back | Next | Finish

Pol: 123456-99 Ins: Kevin Smith99 Dol: 08/19/2018

Step 5 of 5: Save and Assign Claim

Assignment

Assign claim and all exposures to:

Assign Claim and Exposures Individually

Claim Assignment:

New Note

Exposures

New Exposure

#	Type	Coverage	Claimant	Involving	Status	Created Via
1	Vehicle	Collision	Kevin Smith99	2004 Honda Civic (1JXZ199 / Illinois)	Draft	Business Rule

Cancel | Back | Finish

## 5.5 Lab: Claim investigation



### Activity

Answer the following questions about the claim you just created.

- 1. How many incidents are there on the claim?**
- 2. How many exposures are there?**
- 3. What is the coverage and coverage subtype of the exposure?**
- 4. What is the Gross Incurred to date?**
- 5. What is the Line of Business?**
- 6. What is the Loss Type?**
- 7. What is the Claim Segment?**
- 8. What team was this claim assigned to?**
- 9. What is the first Activity that is due?**

## 5.6 Solution: Claim investigation



### Solution

- 1. How many incidents are there on the claim?**  
*3 (Ford, Honda, Michael Cashman)*
- 2. How many exposures are there?**  
*1 (vehicle)*
- 3. What is the coverage and coverage subtype of the exposure?**  
*Collision, collision*
- 4. What is the Gross Incurred to date?**  
*\$3,000*

**5. What is the Line of Business?**

*Personal Auto Line*

**6. What is the Loss Type?**

*Auto*

**7. What is the Claim Segment?**

*Auto - mid complexity*

**8. What team was this claim assigned to?**

*Training Group XX*

**9. What is the first Activity that is due?**

*Make initial contact with insured*

## Lesson 6

# Claim Setup

### 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>.

### 6.1 Lab: Segmentation



#### Activity

In this section, you create a simple claim that involves a windshield break. You then examine how it was segmented.

1. Log on to ClaimCenter as studentXX with a password of "gw".
2. The following transcript 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 Auto Claim wizard.

In creating the claim:

- Assume that the phone call was received on the same day that you are doing this lab.
- 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.
- **IMPORTANT:** Remove the automatically created exposure in the last step of the New Claim Wizard.

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. A rock hit my windshield this morning on my way to work and cracked the windshield.

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.

It happened near McAree Road and Grand Avenue in Waukegan, Illinois. I was driving my Honda Civic on Grand Avenue traveling south when a truck passed. A rock flew up from the road and cracked the windshield.

**IMPORTANT:** Do not assign the claim using automated assignment rules. Under Claim assignment, assign the claim and all exposures to yourself. Remove all exposures before creating the claim.

Examine the claim.

**3. What is the Claim Segment?**

**4. How many incidents are there?**

**5. Why do you think this claim was segmented the way it was?**

**6. In the previous lab, you created a claim that was segmented as mid-complexity. Why do you think it was segmented that way?**

## 6.2 Solution: Segmentation



### Solution

**2. Screenshots from creating the claim based on the transcript:**

Step 1 of 5: Search or Create Policy

Find Policy  Create Unverified Policy

Policy #	123456-99	SSN or Tax ID	
First name		Country	<none>
Last name		City	
Organization Name		State	<none>
Policy Type	<none>	ZIP Code	#####-####
Loss Date	MM/dd/yyyy	VIN	

Policy #	Insured	Address	City	State	ZIP Code	Effective	Expires	Type
Unselect	123456-99	Kevin Smith99	1024 Glenwood Avenue	Waukegan	Illinois	60085	05/09/2018	05/08/2019
Personal Auto								

New Claim

Loss Date \* 08/21/2018

Time 12:01 AM

Type of Claim \*  Auto  
 Auto - Auto First and Final  
 Auto - Quick Claim Auto

Claims History

Status	Claim	Loss Date	Description
Open	000-00-000212	08/19/2018	I was trying to make it through a yellow light, I into the intersection and hit a car traveling we

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### Step 2 of 5: Basic information

<b>Reported By</b>	<b>Involved Vehicle(s)</b>
How Reported	<input type="checkbox"/> 2002 Mini Cooper (4FRT299 / Illinois)
Name	<input checked="" type="checkbox"/> 2004 Honda Civic (1JXZ199 / Illinois)
Relation to Insured	
Date of Notice	Collision \$500.00 Deductible; \$15,000.00 Limit
Verify Date of Birth	Comprehensive \$500.00 Deductible; \$10,000.00 Limit
Date of Birth	
<b>Confirm Contact Info</b>	
Address	1024 Glenwood Avenue, Waukegan, IL 60085
Work Phone	
Home Phone	312-336-6210
Mobile	650-333-3333
Primary Phone	Home
Email	KJSmith@kmail.com
<a href="#">Edit Contact</a>	
<b>Insured</b>	
Name	Kevin Smith99
Address	1024 Glenwood Avenue, Waukegan, IL 60085
Primary Phone	312-336-6210
<b>Main Contact</b>	
Same Person?	<input checked="" type="radio"/> Same as reporter <input type="radio"/> Different person

### Step 3 of 5: Add claim information

What Happened?	Rock hit the windshield.	<a href="#">Cancel</a>
Loss Date	08/21/2018 12:01 AM	
Loss Cause	<input checked="" type="checkbox"/> Glass breakage	
Incident Only?	<input type="checkbox"/>	
Location	* McAree Road and Grand Avenue, Waukegan, IL	
Country	United States	
Address 1	McAree Road and Grand Avenue	
Address 2		
Address 3		
City	* Waukegan	
County		
State	* Illinois	
ZIP Code	#####-####	
Location Description		
Location Code		
Jurisdiction	Illinois	
<b>Vehicles, People, &amp; Property</b>		
<a href="#">Add Vehicle</a> <a href="#">Add Pedestrian</a> <a href="#">Add Property Damage</a>		
 2004 Honda Civic Illinois 1JXZ199		

### Step 5 of 5: Save and Assign Claim

Assignment

Assign claim and all exposures to:

\* Sam Tudent99 (Training Group 99)

New Note

Evaluations

New Exposure | Remove |

#	Type	Coverage	Claimant	Involving	Status	Created Via
No data to display						

Examine the claim.

**3. What is the Claim Segment?**

**Spec 1** Auto – mid complexity

**4. How many incidents are there?**

**Spec 2** 1 – Honda

**5. Why do you think this claim was segmented the way it was?**

**Spec 3** Since this is *only* a windshield, it is not going to take much effort to settle the claim.

**6. In the previous lab, you created a claim that was segmented as mid-complexity. Why do you think it was segmented that way?**

**Spec 4** Because there *were* multiple vehicles involved and an injury.

## 6.3 Lab: Examine the Workplan



### Activity

In this section, you examine the workplan of the claim you just created as well as the more complex claim you created in the last lesson.

**1. Open the claim you just created (the windshield claim).**

**2. How many activities were created during the claim intake process?**

3. Mark the Make initial contact activity as complete.
4. Open the accident claim (the claim you created with two vehicles involved).
5. How many activities were created during the claim intake process?
6. Mark the Make initial contact activity as complete.
7. Create a Request activity to get the initial medical report for Michael Cashman. Add an appropriate description and set the escalation date to one week from today.

## 6.4 Solution: Examine the Workplan



### Solution

1. Open the claim you just created (the windshield claim).
2. How many activities were created during the claim intake process?  
**3**
3. Mark the Make initial contact activity as complete.  
*Either click the Subject value and then click Complete in the worksheet below OR Select the checkbox on the Make initial contact line and click Complete.*
4. Open the accident claim (the claim you created with two vehicles involved).
5. How many activities were created during the claim intake process?  
**3**
6. Mark the Make initial contact activity as complete.  
*Either click the Subject value and then click Complete in the worksheet below OR Select the checkbox on the Make initial contact line and click Complete.*
7. Create a Request activity to get the initial medical report for Michael Cashman. Add an appropriate description and set the escalation date to one week from today.  
*Click Actions → New Activity Request → Get initial medical report*

## ClaimCenter 10 Introduction: Kickstart - Student Workbook

The screenshot shows the ClaimCenter 10 interface. The top navigation bar includes Desktop, Claim (000-00-000212), Search, Address Book, and Vacation. The left sidebar has sections like Summary, Status, Health Metrics, Workplan, Loss Details, Exposures, Parties Involved, Policy, and Financials. The main area shows a list of actions under 'New Activity'. A context menu is open over the 'Get initial medical report' item, listing various tasks such as Correspondence, Interview, New Mail, Reminder, Request, Warning, and several options under 'Claim Actions'.

### New Activity in Claim 000-00-000212

Subject	<input type="text" value="Get initial medical report"/>
Description	<input type="text" value="This report is for the Michael Cashman injury"/>
Related To	<input type="text" value="Claim"/>
Due Date	<input type="text" value="08/27/2018"/>
Escalation Date	<input type="text" value="08/28/2018"/>
Priority	<input type="text" value="Normal"/>
Mandatory	<input type="text" value="Yes"/>
Calendar Importance	<input type="text" value="Not On Calendar"/>
Recurring	<input type="text" value="No"/>
Externally Owned	<input checked="" type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<input type="text" value="&lt;none&gt;"/>
Document Template	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="Delete"/>
Email Template	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="Delete"/>
Assign To	<input type="text" value="Use automated assignment"/> <input type="button" value="Search"/>

Workplan

All open activities					
	Due	Priority	Status	Subject	Exposures
<input type="checkbox"/>	08/27/2018	Normal	Open	Get initial medical report	
<input type="checkbox"/>	08/27/2018	Normal	Open	Get vehicle inspected	(1) 1st Party Vehicle - Kevin Smith99
<input type="checkbox"/>	09/19/2018	Normal	Open	Initial 30 day file review	

## 6.5 Lab: Validation



### Activity

1. Examine the claim you created with two vehicles involved.
2. What is the validation (maturity) level of the claim?
3. Check the validation level of the claim and exposures for New loss completion. Are there any errors?
4. Check the validation level of the claim and exposures for Ability to pay. Are there any errors?
5. If there are any errors, correct them.
6. Clear the validation error in the worksheet.
7. Revalidate the claim and exposures for Ability to pay.

## 6.6 Solution: Validation



### Solution

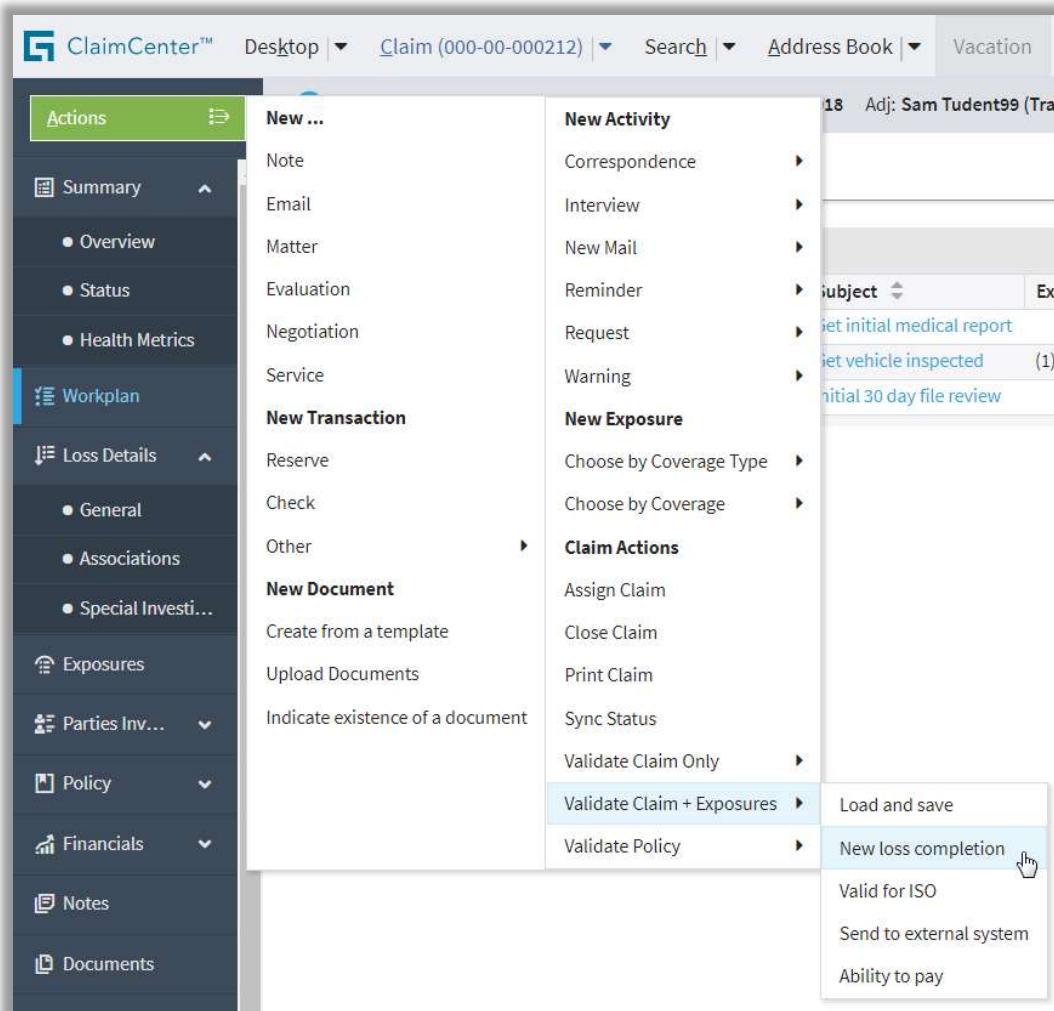
- 1. Examine the claim you created with two vehicles involved.**

- 2. What is the validation (maturity) level of the claim?**

*Ability to pay*

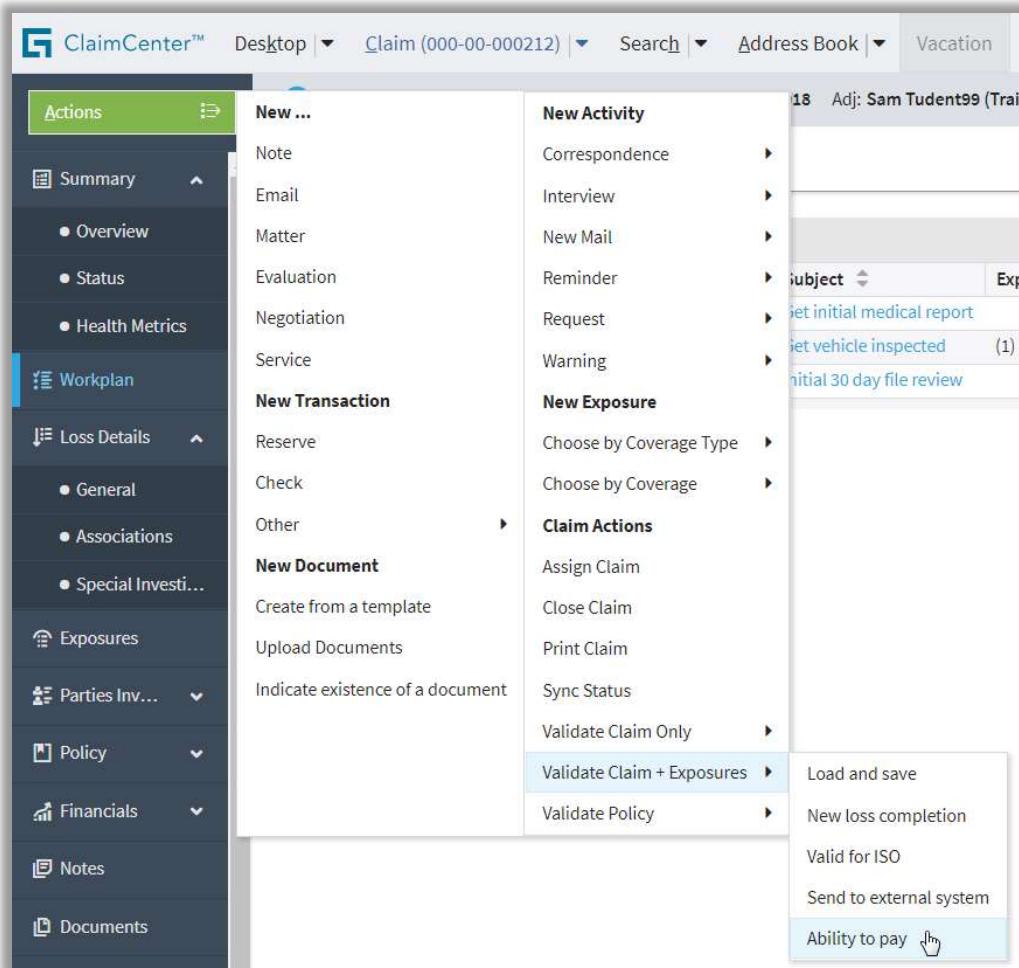
- 3. Check the validation level of the claim and exposures for New loss completion. Are there any errors?**

*No*



- 4. Check the validation level of the claim and exposures for Ability to pay. Are there any errors?**

*Yes*



The screenshot shows the 'Validation Results' page. The title 'Validation Results' is at the top in a red header. Below it is a green button labeled 'Clear'. A blue box contains the message 'Errors located on another page: (1) 1st Party Vehicle - Kevin Smith99' with a note 'Vehicle incident description must not be empty'.

5. If there are any errors, correct them.

(1) 1st Party Vehicle - Kevin Smith99

Edit		Assign	Close Exposure	Create Reserve	Send To ISO	Re
<input type="button" value="Details"/> <input type="button" value="Total Loss Calculator"/> <input type="button" value="ISO"/>						
<b>Exposure</b>						
Loss Party	Insured's loss					
Primary Coverage	Collision					
Coverage Subtype	Collision					
Coverage	2004 Honda Civic (1JXZ199 / Illinois)					
Adjuster	Sam Tudent99					
Group	Training Group 99					
Status	Open					
Created Via	Business Rule					
Create Date	08/20/2018					
Validation Level	New loss completion					
<b>Claimant</b>						
Claimant	Kevin Smith99					

<b>Claimant</b>			<b>Future Payments</b>
Claimant	* Kevin Smith99		Total Paid
Type	* Insured		Total Recoveries
Contact Prohibited?	<input type="radio"/> Yes <input checked="" type="radio"/> No		Net Total Incurred
Primary Phone	312-336-6210		<b>Deductible</b>
Address	1024 Glenwood Avenue, Waukegan, IL 60085		Waived
<b>Incident Overview</b>			Amount
Vehicle	* 2004 Honda Civic (1JXZ199 / Illinois)		Amount Applied
Driver	Kevin Smith99		Amount Remaining
Description			New Incident...
Operable?			Edit Incident Details...

**Damage Description**

Front right fender damaged.

---

**Details**

Was the vehicle parked?  Yes  No

Loss Occurred? \*  In transit

Airbags Deployed?  Yes  No

Equipment Failure?  Yes  No

Operable?  Yes  No

Total Loss?  Yes  No

Loss Estimate \$

---

**Collision**

Was there a collision?  Yes  No

---

**Theft**

Was the vehicle stolen?  Yes  No

---

**6. Clear the validation error in the worksheet.**

**7. Revalidate the claim and exposures for Ability to pay.**

## Lesson 7

# Introduction to the Data Model

## 7.1 Lab: Examine the data dictionary



### Activity

In this lab, you use the Data Dictionary to explore the ClaimCenter data model.

1. In Windows Explorer, navigate to the ClaimCenter install directory.
  2. Shift + Right-click ClaimCenter and select Open command window here.
  3. In the Command window, enter `gwb genDataDictionary -x compile` and hit Enter.  
Continue with the lab when the dictionary build is complete. You should see a message that the Data Dictionary HTML files are generated. This may take 5 minutes.
  4. What is the purpose of the Data Dictionary?
- 
5. Open the Dictionary in a browser. (`C:\GW10\ClaimCenter\build\dictionary\data\index.html`)
  6. Create a bookmark for the Data Dictionary in your web browser.
  7. Answer the following questions about the current data model as described in the Data Dictionary:
    - a) What is the datatype for the Contact email address fields?
    - b) Contact has a Tax ID field. Is this field used to store a social security number (SSN), an employer ID number (EIN), or both?
    - c) Is the Contact entity subtyped?
    - d) What are the top-level Subtypes of Contact?
    - e) Name two attributes of an Attorney that are not on a Person.
    - f) Which has more arrays: the Group entity or the Role entity?

- g) How many entities have a field named "Organization". (Hint: From the main page of the Data Dictionary, click the All Fields link.)

## 7.2 Solution: Examine the data dictionary

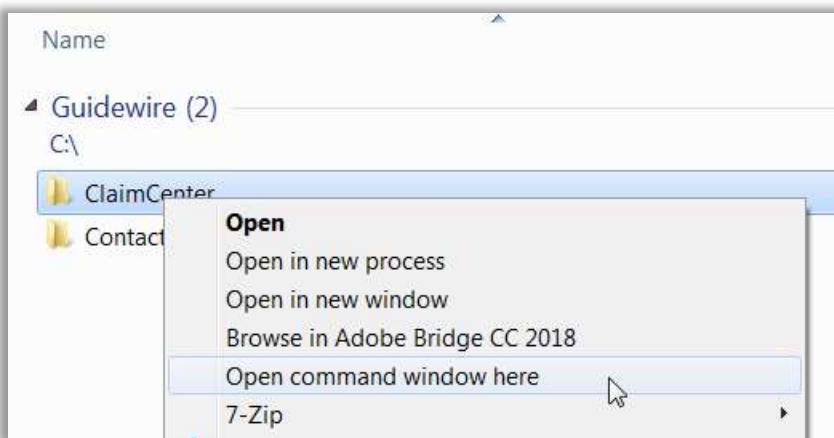


### Solution

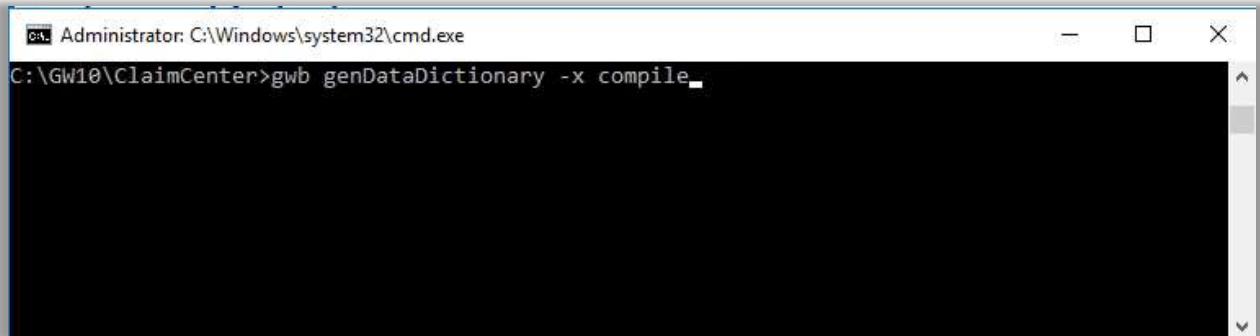
1. In Windows Explorer, navigate to the ClaimCenter install directory.



2. Shift + Right-click ClaimCenter and select Open command window here.

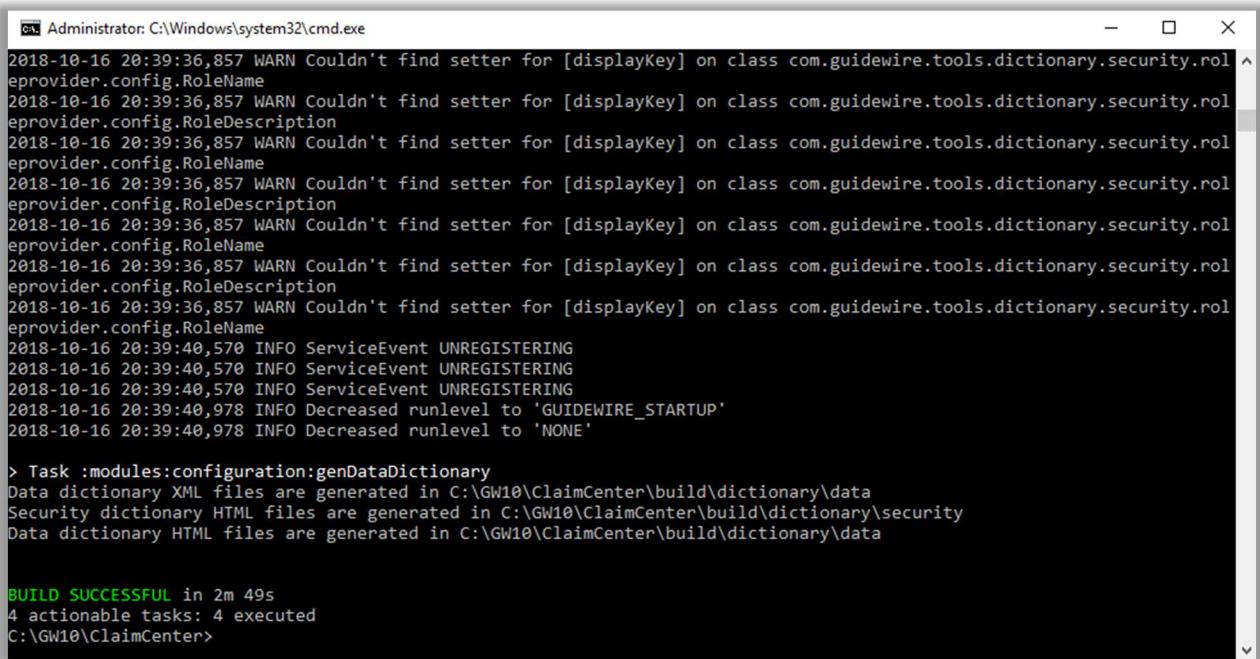


3. In the Command window, enter `gwb genDataDictionary -x compile` and hit Enter.



Administrator: C:\Windows\system32\cmd.exe  
C:\GW10\ClaimCenter>gwb genDataDictionary -x compile

**Continue with the lab when the dictionary build is complete. You should see a message that the Data Dictionary HTML files are generated. This may take 5 minutes.**



```
Administrator: C:\Windows\system32\cmd.exe
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleName
2018-10-16 20:39:36,857 WARN Couldn't find setter for [displayKey] on class com.guidewire.tools.dictionary.roleprovider.config.RoleDescription
2018-10-16 20:39:40,570 INFO ServiceEvent UNREGISTERING
2018-10-16 20:39:40,570 INFO ServiceEvent UNREGISTERING
2018-10-16 20:39:40,570 INFO ServiceEvent UNREGISTERING
2018-10-16 20:39:40,978 INFO Decreased runlevel to 'GUIDEWIRE_STARTUP'
2018-10-16 20:39:40,978 INFO Decreased runlevel to 'NONE'

> Task :modules:configuration:genDataDictionary
Data dictionary XML files are generated in C:\GW10\ClaimCenter\build\dictionary\data
Security dictionary HTML files are generated in C:\GW10\ClaimCenter\build\dictionary\security
Data dictionary HTML files are generated in C:\GW10\ClaimCenter\build\dictionary\data

BUILD SUCCESSFUL in 2m 49s
4 actionable tasks: 4 executed
C:\GW10\ClaimCenter>
```

#### **4. What is the purpose of the Data Dictionary?**

*The Data Dictionary is a set of linked documentation in HTML. It describes all the data entities and typelists that make up the data model. The Data Dictionary also lists all attributes and fields for the data entities and extension entities.*

- 5. Open the Dictionary in a browser. (C:\GW10\ClaimCenter\build\dictionary\data\index.html)**
- 6. Create a bookmark for the Data Dictionary in your web browser.**
- 7. Answer the following questions about the current data model as described in the Data Dictionary.**

- a) What is the datatype for the Contact email address fields?

*varchar(60)*

**ClaimCenter 10 Introduction: Kickstart - Student Workbook**

- b) Contact has a Tax ID field. Is this field used to store a social security number (SSN), an employer ID number (EIN), or both?

*Both*

- c) Is the Contact entity subtyped?

*Yes*

- d) What are the top-level Subtypes of Contact?

*Company, Person, and Place*

- e) Name two attributes of an Attorney that are not on a Person.

*AttorneyLicense and AttorneySpecialty*

- f) Which has more arrays: the Group entity or the Role entity?

*Group*

- g) How many entities have a field named "Organization". (Hint: From the main page of the Data Dictionary, click the All Fields link.)

*10*

## Lesson 8

# Adjudication

### 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: Add an incident to a claim



#### Activity

In this lab, you add an incident to an existing claim. The claim you will use is the Kevin Smith claim that involved the two-vehicle accident.

1. Log on to ClaimCenter as studentXX with a password of "gw".
2. Use the following transcript of a recent call from Kevin Smith to add an incident to the accident claim. This is not the windshield claim.

#### Transcript

Hello. My name is Kevin SmithXX. My policy number is 123456-XX. I reported an accident earlier today and need to add some information.

I told you that I was not injured in the accident but after I got home, I started getting a major headache. It became bad enough that I went to the Doctor and she found that I have a concussion.

I have an appointment with a specialist tomorrow to see how bad it is.

### 8.2 Solution: Add an incident to a claim



#### Solution

2. Use the following transcript of a recent call from Kevin Smith to add an incident to the claim.
  - a) Open the claim.

- b) Edit the Loss Details
- c) Add an Injury for Kevin Smith.

**Loss Details**  **Edit**

**Details**

Loss Details	
Description	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
Loss Cause	Collision with motor vehicle
Fault Rating	
Catastrophe	
Weather	
In Course of Employment?	
Date of Loss	08/19/2018 12:01 AM

**Injuries**  **Add**

<input type="checkbox"/>	Name	Severity	Description
<input type="checkbox"/>	Michael Cashman	Minor	Minor concussion

### Injury Incident

[Return to Loss Details](#)

**Injury Details**

Injured Person	* Kevin Smith99
Loss Party	* Insured's loss
Severity	Moderate
Describe Injuries	Concussion
General Injury Type	Specific injury
Detailed Injury Type	Concussion

**Body Parts** [Add](#) [Remove](#) [Make First](#)

<input type="checkbox"/> Area of Body*	Body Part*	Body Part Description	Side	PPD Percentage
<input type="checkbox"/> Head	Brain			%

### Vehicles

[Add](#) [Remove](#)

<input type="checkbox"/>	Make	Model	Plate	State	Loss Party	Driver
<input type="checkbox"/>	Ford	Fiesta	223RFT	Michigan	Third-party liability	Michael Cashman
<input type="checkbox"/>	Honda	Civic	1JXZ199	Illinois	Insured's loss	Kevin Smith99

**Properties** [Add](#) [Remove](#)

<input type="checkbox"/> Address	City	State
No data to display		

**Injuries** [Add](#) [Remove](#)

<input type="checkbox"/>	Name	Severity	Description
<input type="checkbox"/>	Michael Cashman	Minor	Minor concussion
<input type="checkbox"/>	Kevin Smith99	Moderate	Concussion

## 8.3 Lab: Add exposures to a claim



### Activity

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

1. **As studentXX, log on to ClaimCenter. Navigate to the Kevin SmithXX accident claim. Manually create the exposures for the claim. To help you determine what exposures are needed, the transcript from the First Notice of Loss and the follow-up call have been copied below.**

When it comes to selecting the correct coverage, keep the following definitions of coverages in mind:

- Collision covers losses to the insured's vehicle due to an accident (such as hitting another vehicle).
- Medical Payments covers injuries to any driver covered on the policy and to any passenger in a covered vehicle.
- Liability – Bodily Injury and Property Damage covers damage the insured does to a third party or something owned by a third party.

Note: You may not be using all these coverages in your lab.

### Initial 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.

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.

The other vehicle was a 2002 Ford Fiesta with a Michigan license plate of 223RFT. It was driven by Michael CashmanXX. He lives at 713 Leith Avenue, Waukegan, Illinois, 60087. His cell phone number is (312) 343-2909.

The left side of the other car is fairly smashed up, including damage to the driver-side door.

Mr. CashmanXX also hit his head against the steering wheel. He was taken to the hospital and diagnosed with a minor 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.

## Follow-up transcript

Hello. My name is Kevin SmithXX. My policy number is 123456-XX. I reported an accident earlier today and need to add some information.

I told you that I was not injured in the accident but after I got home, I started getting a major headache. It became bad enough that I went to the Doctor and she found that I have a concussion.

I have an appointment with a specialist tomorrow to see how bad it is.

- 2. If you see a message about the Fault Rating not yet being entered, the accident was Mr. Smith's fault, so set the fault rating before you create the exposures.**
- 3. When you have completed the exposures, review them in the exposure list. Your exposures should look like the ones listed below. Your exposures may appear in a different order and have a different XX suffix. But for each exposure, the Type, Coverage, and Claimant values should match those in the screenshot below.**

Exposures							
		All claimants					
	#	Type	Coverage	Claimant	Adjuster	Status	Rem
<input type="checkbox"/>	1	Vehicle	Collision	Kevin Smith99	Sam Tudent99	Open	
<input type="checkbox"/>	2	Vehicle	Liability - Bodily Injury and Property Damage	Michael Cashman	Sam Tudent99	Open	
<input type="checkbox"/>	3	Bodily Injury	Liability - Bodily Injury and Property Damage	Michael Cashman	Sam Tudent99	Open	
<input type="checkbox"/>	4	Med Pay	Medical Payments	Kevin Smith99	Sam Tudent99	Open	

When each exposure was created, ClaimCenter executed exposure workplan rules. Review the claim's workplan.

- 4. For each exposure, identify the activities that were created.**

- a) Damage to Kevin SmithXX's vehicle:**
- b) Damage to Michael CashmanXX's vehicle:**
- c) MichaelCashmanXX's concussion:**

## 8.4 Solution: Add exposures to a claim



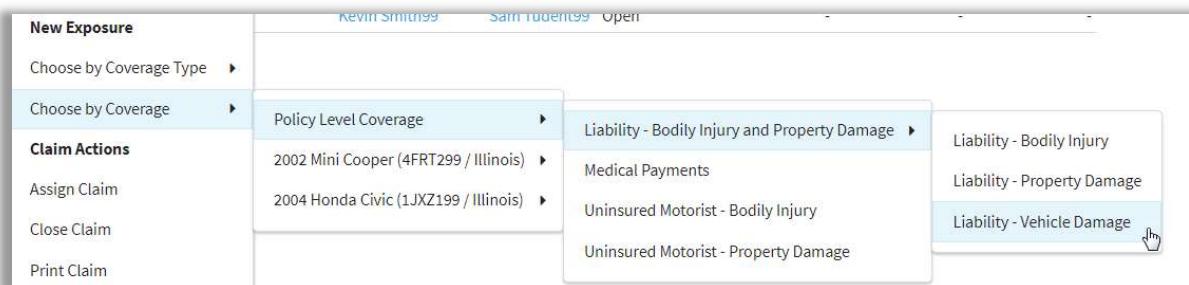
### Solution

1. As studentXX, log on to ClaimCenter. Navigate to the Kevin SmithXX accident claim. Manually create the exposures for the claim. To help you determine what exposures are needed, the transcript from the First Notice of Loss and the follow-up call have been copied below.
2. If you see a message about the Fault Rating not yet being entered, the accident was Mr. Smith's fault, so set the fault rating before you create the exposures.

Loss Details

Details	
<b>Loss Details</b>	
Description	I was driving my Honda Civic on Grand Avenue traveling north. I was trying to make it through a yellow light, but I wasn't able to. I hit the brakes, but there was oil on the road. I skidded into the
Loss Cause	* Collision with motor vehicle
Fault Rating	Insured at fault
Insured's Liability %	%
Catastrophe	<none>
Weather	<none>

3. When you have completed the exposures, review them in the exposure list. Your exposures should look like the ones listed below. Your exposures may appear in a different order and have a different XX suffix. But for each exposure, the Type, Coverage, and Claimant values should match those in the screenshot below.



## New Exposure - Vehicle

<b>Exposure</b>	
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) ▾
<b>Claimant</b>	
Claimant	* Michael Cashman99 ▾
Type	* Owner of other vehicle ▾
Contact Prohibited?	<input type="radio"/> Yes <input type="radio"/> No
Primary Phone	312-343-2909
Address	713 Leith Avenue, Waukegan, IL
<b>Incident Overview</b>	
Vehicle	* 2002 Ford Fiesta (223RFT / Michigan) ▾
Driver	Michael Cashman99
Description	The left side is fairly smashed up, including damage to the driver-side door.

## New Exposure - Bodily Injury

**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) ▾

**Claimant**

Claimant	* Michael Cashman99 ▾
Type	* Driver of other vehicle ▾
Contact Prohibited?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Primary Phone	312-343-2909
Address	713 Leith Avenue, Waukegan, IL
Alternate Contact	<none> ▾

**Injury Incident Overview**

Injury	* Kevin Smith99, Moderate Concussion ▾
Injured Person	Kevin Smith99
Severity	Moderate
Description	Concussion

### New Exposure - Med Pay

<b>Exposure</b>	
Loss Party	Third-party liability
Primary Coverage	Medical Payments
Coverage Subtype	Medical Payments
Coverage	Policy Level Coverage (Medical Payments)
<b>Claimant</b>	
Claimant	* Kevin Smith99
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>
<b>Injury Incident Overview</b>	
Injury	* Michael Cashman99, Moderate Concussion
Injured Person	Michael Cashman99
Severity	Moderate
Description	

### Exposures

All claimants						
<input type="checkbox"/>	#	Type	Coverage	Claimant	Adjuster	Status
<input type="checkbox"/>	1	Vehicle	Collision	Kevin Smith99	Sam Tudent99	Open
<input type="checkbox"/>	2	Vehicle	Liability - Bodily Injury and Property Damage	Michael Cashman99	Sam Tudent99	Open
<input type="checkbox"/>	3	Bodily Injury	Liability - Bodily Injury and Property Damage	Michael Cashman99	Sam Tudent99	Open
<input type="checkbox"/>	4	Med Pay	Medical Payments	Kevin Smith99	Sam Tudent99	Open

**4. For each exposure, identify the activities that were created.**

- a) Damage to Kevin SmithXX's vehicle:

*Get vehicle inspected*

- b) Damage to Michael CashmanXX's vehicle:

*Make initial contact with claimant and Get vehicle inspected*

- c) MichaelCashmanXX's concussion:

*Make initial contact with claimant and Get claimant medical reports*

## 8.5 Lab: Adding reserves



### Activity

In this lab, you modify the reserves for the Kevin SmithXX claim that you have been using (the claim with two vehicles and two injuries).

1. ClaimCenter has already added initial reserves for the exposures during exposure set-up. For each reserve line, identify the exposure, cost type, cost category, and amount of remaining reserves.

Reserve Line	Exposure #	Cost Type	Cost Category	Remaining Reserves
1				
2				
3				
4				

2. Create a new reserve line for the exposure covering the injury to Michael CashmanXX. This reserve line is to indemnify Michael CashmanXX. Set the reserve amount to \$2000.
3. Create a new reserve line for the exposure covering the injury to Michael CashmanXX. This reserve line is for expenses incurred by Succeed Insurance in obtaining medical reports about his injury. Set the amount to \$400. (You can use the "Other" expense category.) Click Save after adding this reserve line.
4. You just received a memo stating that the cost of processing medical reports has just increased. Increase the reserve line you just created so that it has \$750.

When you are done, review the reserve lines for the claim (financials summary). They should look like this (some columns hidden to allow enough space to fit on the page):

View		Exposure	Remaining Reserves	Net Total Incurred
▼	Claim Total		\$8,750.00	\$8,750.00
▼	(1) 1st Party Vehicle - Kevin Smith99 - Collision		\$3,000.00	\$3,000.00
	▼ Claim Cost		\$2,500.00	\$2,500.00
	Auto body USD	▼	\$2,500.00	\$2,500.00
	▼ Expense - A&O		\$500.00	\$500.00
	Vehicle inspection USD	▼	\$500.00	\$500.00
▼	(2) 3rd Party Vehicle - Michael Cashman99 - Liability - Bodily Injury and Property Damage		\$3,000.00	\$3,000.00
	▼ Claim Cost		\$2,500.00	\$2,500.00
	Auto body USD	▼	\$2,500.00	\$2,500.00
	▼ Expense - A&O		\$500.00	\$500.00
	Vehicle inspection USD	▼	\$500.00	\$500.00
▼	(3) 3rd Party Bodily Injury - Michael Cashman99 - Liability - Bodily Injury and Property Damage		\$750.00	\$750.00
	▼ Expense - A&O		\$750.00	\$750.00
	Other USD	▼	\$750.00	\$750.00
▼	(4) 3rd Party Med Pay - Kevin Smith99 - Medical Payments		\$2,000.00	\$2,000.00
	▼ Claim Cost		\$2,000.00	\$2,000.00
	Medical USD	▼	\$2,000.00	\$2,000.00

## 8.6 Solution: Adding reserves



### Solution

1. ClaimCenter has already added initial reserves for the exposures during exposure set-up. For each reserve line, identify the exposure, cost type, cost category, and amount of remaining reserves.

Reserve Line	Exposure #	Cost Type	Cost Category	Remaining Reserves
1	1	Claim Cost	Auto body USD	\$2500
2	1	Expense – A & O	Vehicle inspection USD	\$500
3	2	Claim Cost	Auto body USD	\$2500

4	2	Expense – A & O	Vehicle inspection USD	\$500
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List of transactions

## Financials (Total Incurred: \$8,750.00): Transactions

Create Date	Amount	Exposure	Coverage	Cost Type	Cost Category
04/06/2018	\$2,500.00	1	Collision	Claim Cost	Auto body
04/06/2018	\$500.00	1	Collision	Expense - A&O	Vehicle inspection
04/25/2018	\$2,500.00	2	Liability - Bodily Injury and Property Damage	Claim Cost	Auto body
04/25/2018	\$500.00	2	Liability - Bodily Injury and Property Damage	Expense - A&O	Vehicle inspection

- 2. Create a new reserve line for the exposure covering the injury to Michael CashmanXX. This reserve line is to indemnify Michael CashmanXX. Set the reserve amount to \$2000.**

10/17/2018	\$2,000.00	4	Medical Payments	Claim Cost	Medical
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- 3. Create a new reserve line for the exposure covering the injury to Michael CashmanXX. This reserve line is for expenses incurred by Succeed Insurance in obtaining medical reports about his injury. Set the amount to \$400. (You can use the "Other" expense category.) Click Save after adding this reserve line.**

10/17/2018	\$400.00	3	Liability - Bodily Injury and Property Damage	Expense - A&O	Other
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- 4. You just received a memo stating that the cost of processing medical reports has just increased. Increase the reserve line you just created so that it has \$750.**

10/17/2018	\$350.00	3	Liability - Bodily Injury and Property Damage	Expense - A&O	Other
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When you are done, review the reserve lines for the claim (financials summary). They should look like this (some columns hidden to allow enough space to fit on the page):

## Financials: Summary

View	Exposure	Remaining Reserves	Net Total Incurred
▼ Claim Total		\$8,750.00	\$8,750.00
▼ (1) 1st Party Vehicle - Kevin Smith99 - Collision		\$3,000.00	\$3,000.00
▼ Claim Cost		\$2,500.00	\$2,500.00
Auto body USD	▼	\$2,500.00	\$2,500.00
▼ Expense - A&O		\$500.00	\$500.00
Vehicle inspection USD	▼	\$500.00	\$500.00
▼ (2) 3rd Party Vehicle - Michael Cashman99 - Liability - Bodily Injury and Property Damage		\$3,000.00	\$3,000.00
▼ Claim Cost		\$2,500.00	\$2,500.00
Auto body USD	▼	\$2,500.00	\$2,500.00
▼ Expense - A&O		\$500.00	\$500.00
Vehicle inspection USD	▼	\$500.00	\$500.00
▼ (3) 3rd Party Bodily Injury - Michael Cashman99 - Liability - Bodily Injury and Property Damage		\$750.00	\$750.00
▼ Expense - A&O		\$750.00	\$750.00
Other USD	▼	\$750.00	\$750.00
▼ (4) 3rd Party Med Pay - Kevin Smith99 - Medical Payments		\$2,000.00	\$2,000.00
▼ Claim Cost		\$2,000.00	\$2,000.00
Medical USD	▼	\$2,000.00	\$2,000.00