GUIDEWIRE

ClaimCenter 10 Configuration: Essentials

Student Workbook

Exercises and Tutorials

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Table of Contents

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.

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.**

STOP

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.**

STOP

1.3 Solutions

1.3.1 Record of note

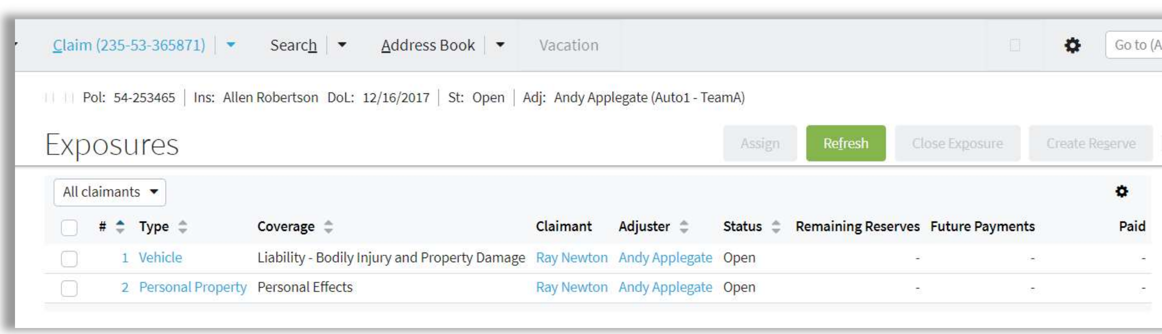
Solution

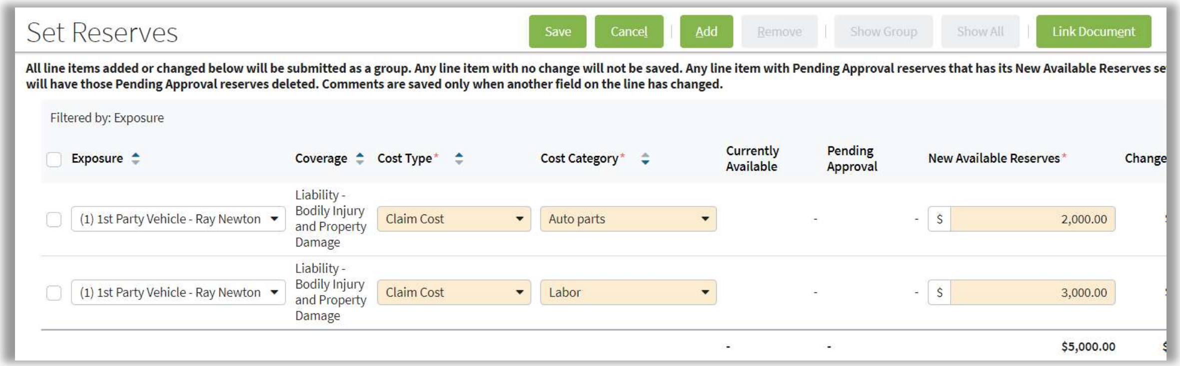
Exact details on how to complete the lab.

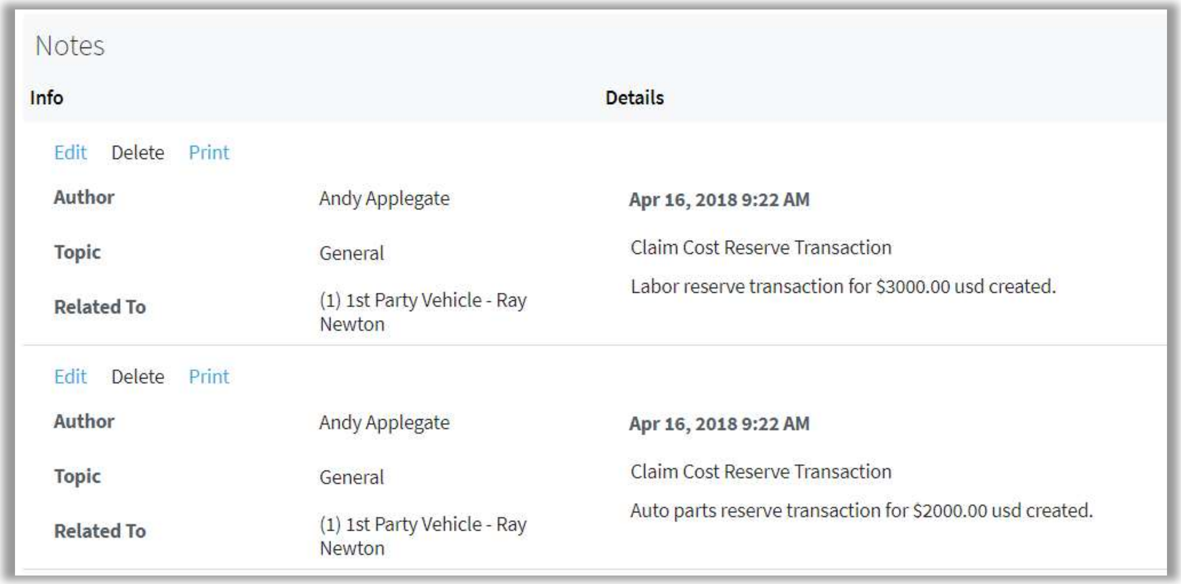
- Transaction Post-setup
  - [x] TPS01000 - Check Aggregate Limits
  - [x] TPS02000 - Check Aggregate Deductible
  - [x] TPS03000 - Add note for all new reserve transactions

```
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
```

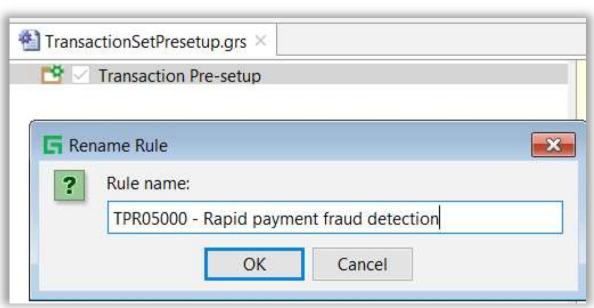
1.3.2 Test procedure





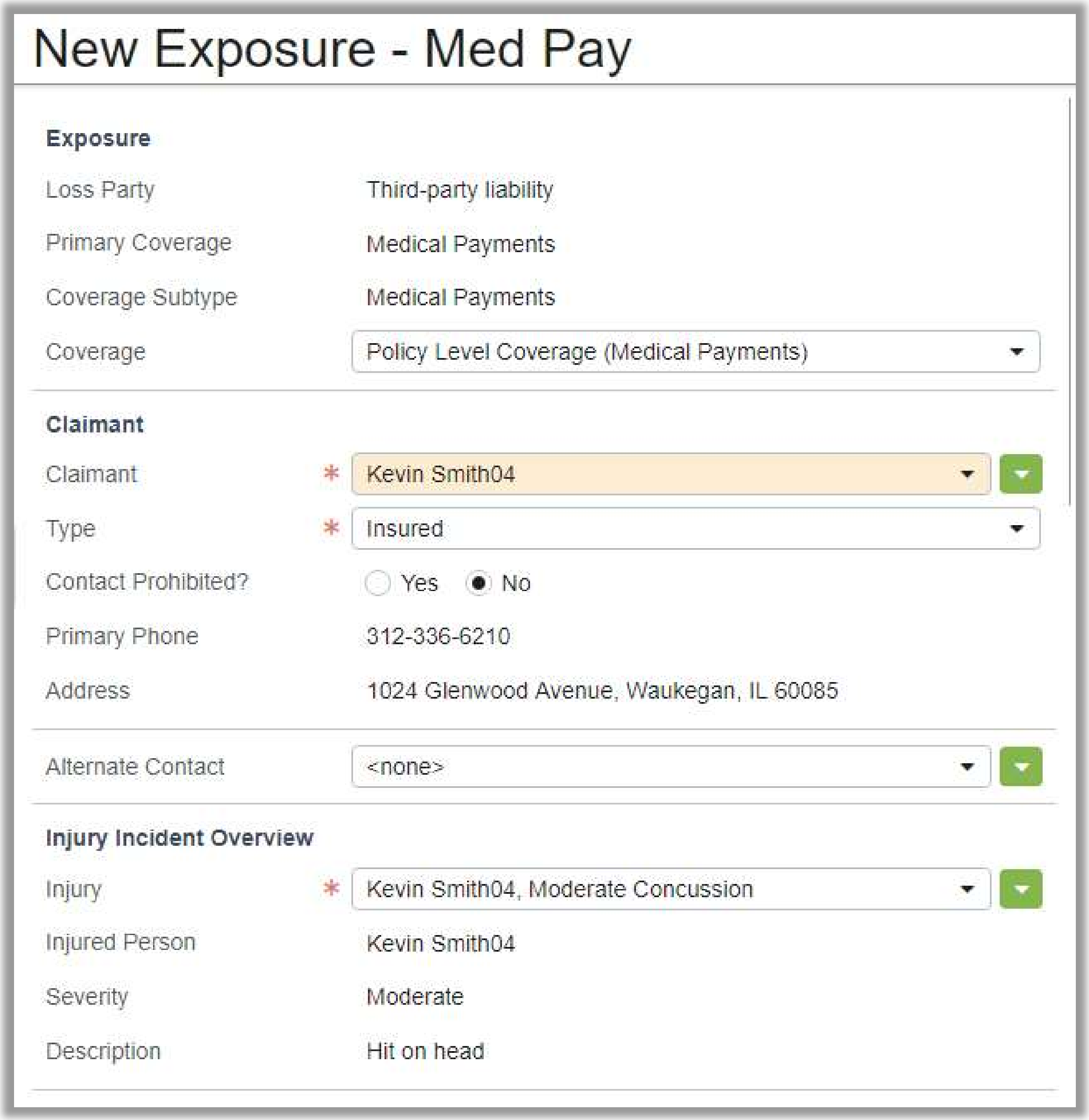


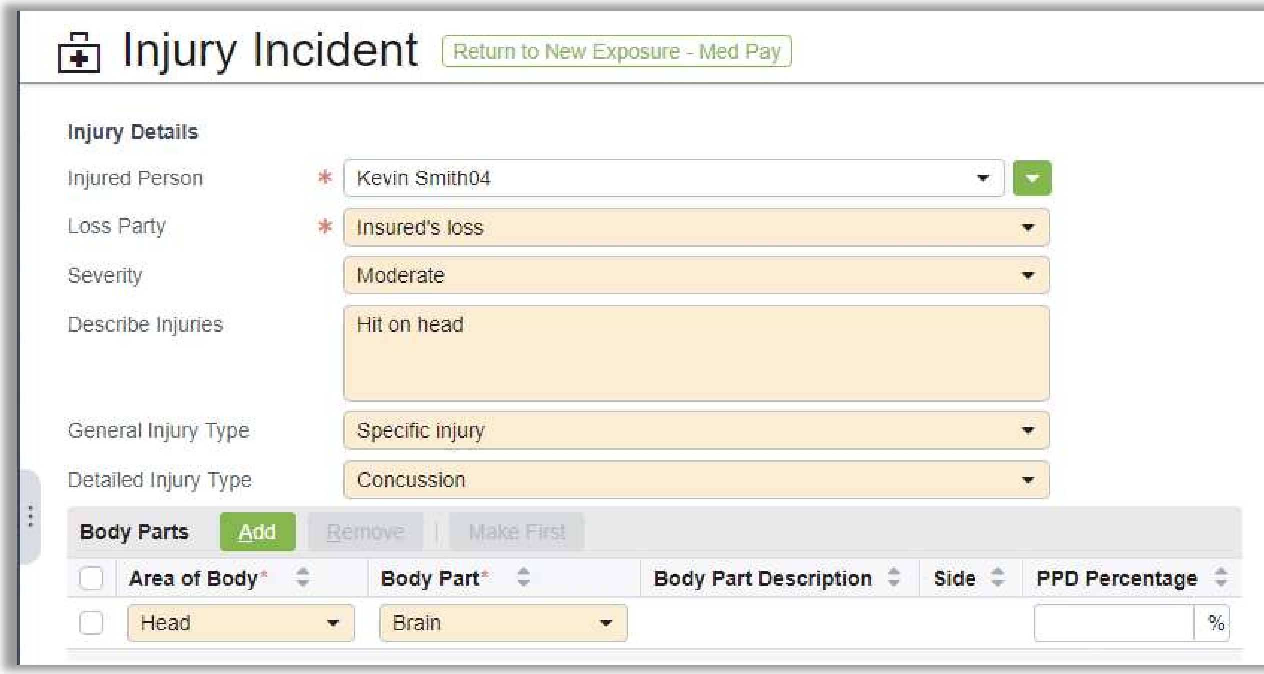
1.3.3 Payment matching reserve fraud detection



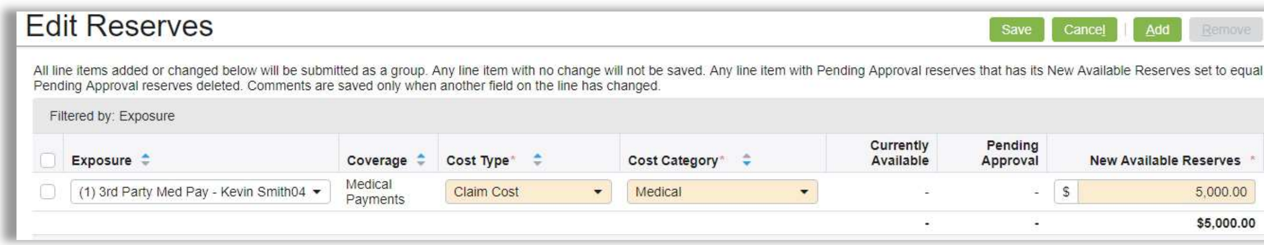
```
USES:
uses typekey.*
uses typekey.TransactionSet

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

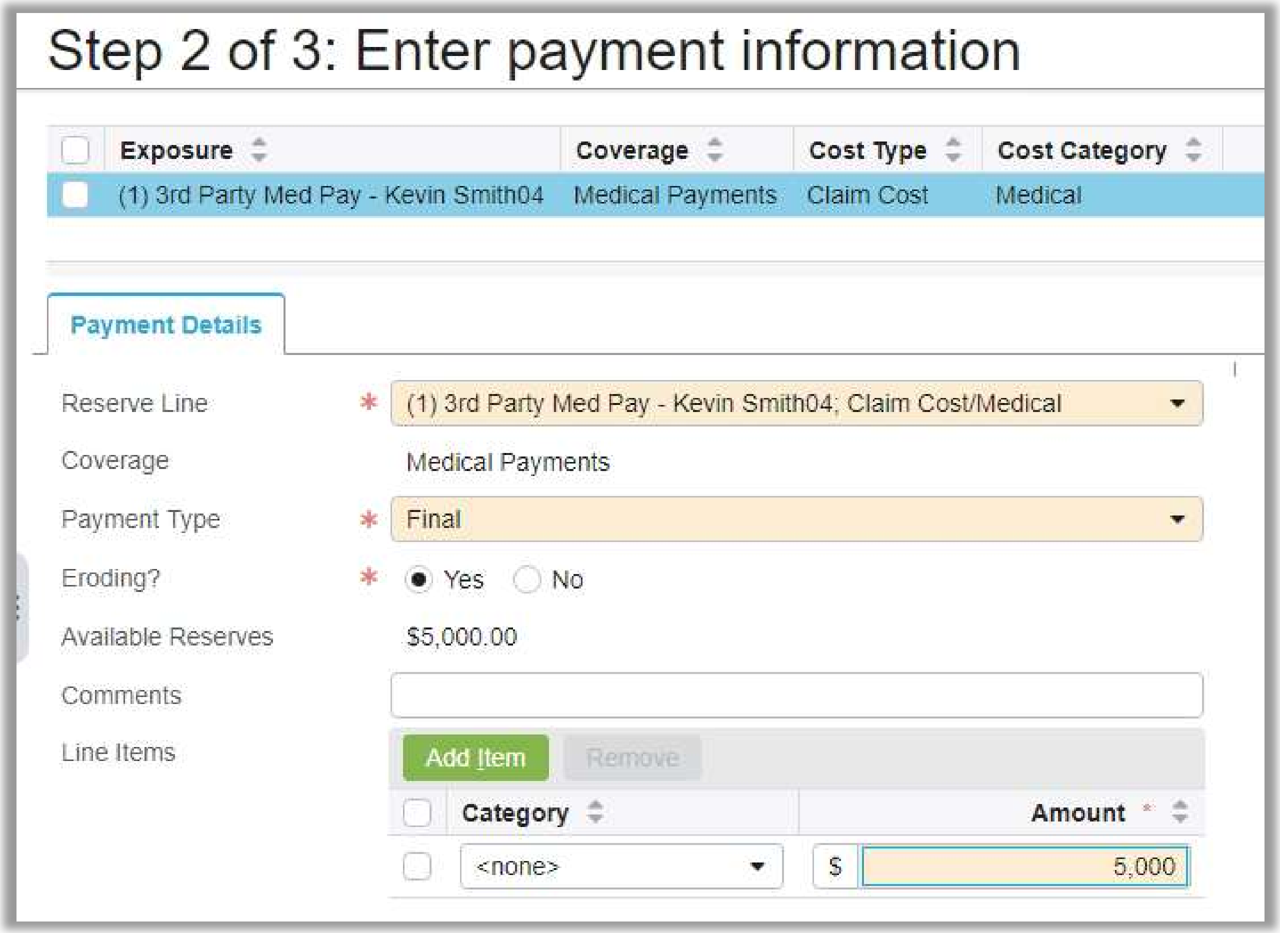


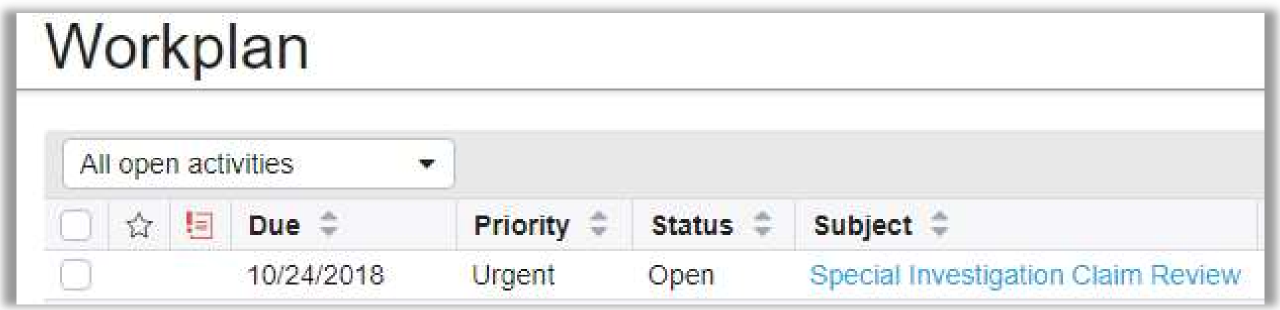


Injury Incident
Return to New Exposure - Med Pay
Injury Details
Injured Person
Kevin Smith04
Loss Party
Insured's loss
Severity
Moderate
Describe Injuries
Hit on head
General Injury Type
Specific injury
Detailed Injury Type
Concussion
Body Parts
Add
Remove
Make First
Area of Body
Body Part
Body Part Description
Side
PPD Percentage
Head
Brain
%



Edit Reserves
Save
Cancel
Add
Remove
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
No
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.

STOP

2.2 Solutions

2.2.1 Place a financial hold if a claim is in litigation

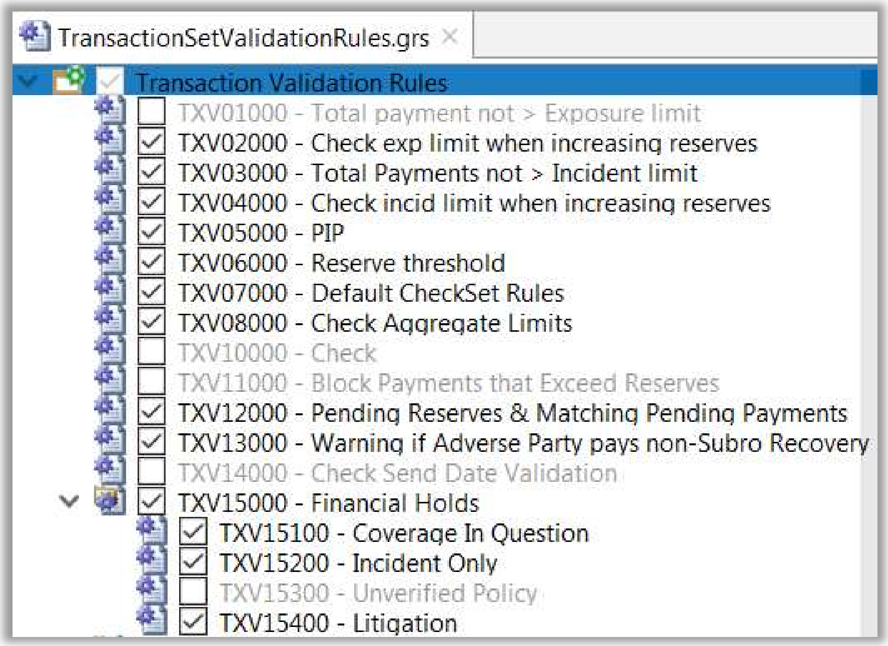
Solution

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
```

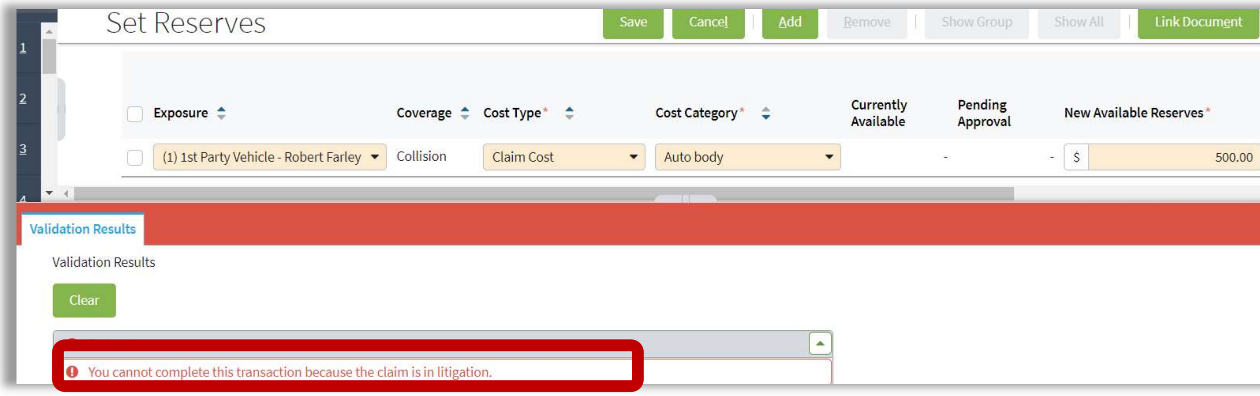
FinancialHoldsImpl.gs

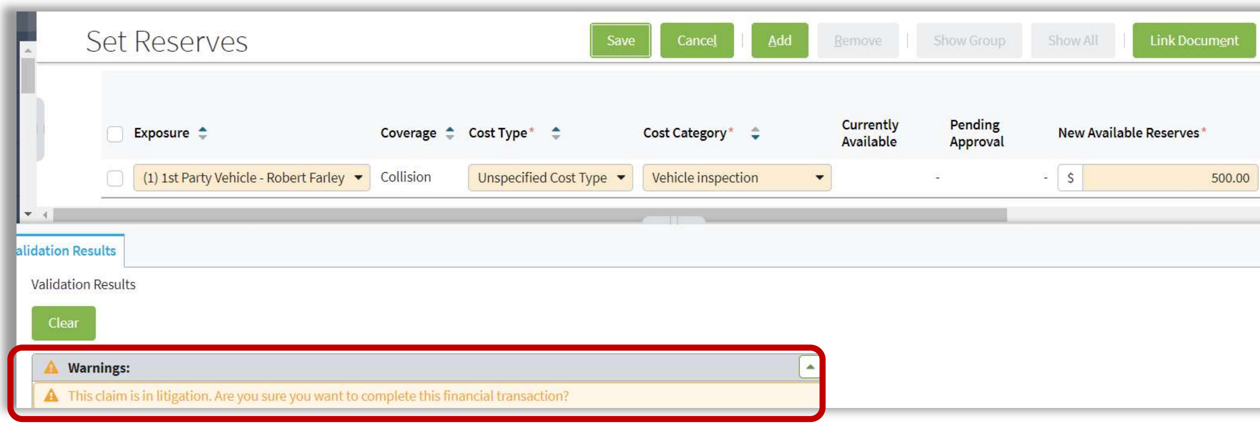
```
package gw.api.financials

@Export
class FinancialHoldsImpl implements FinancialHolds {

  private var _claim: Claim

  construct(claim: Claim) { _claim = claim }

  override function applyFinancialHolds() : Boolean {
    return _claim.CoverageInQuestion
        or _claim.IncidentReport
        or not _claim.Policy.Verified
        or _claim.LitigationStatus == LitigationStatus.TC_LITIGATED
  }
}
```

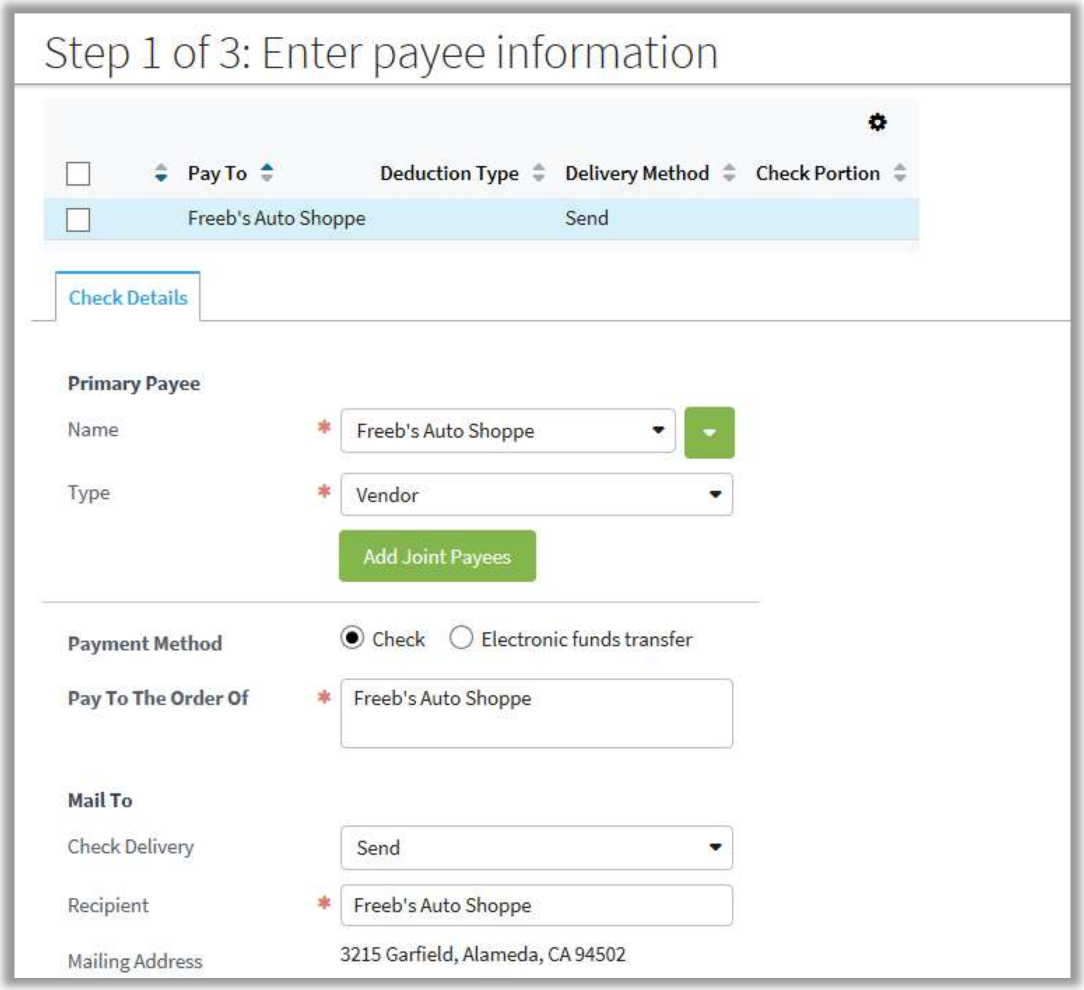


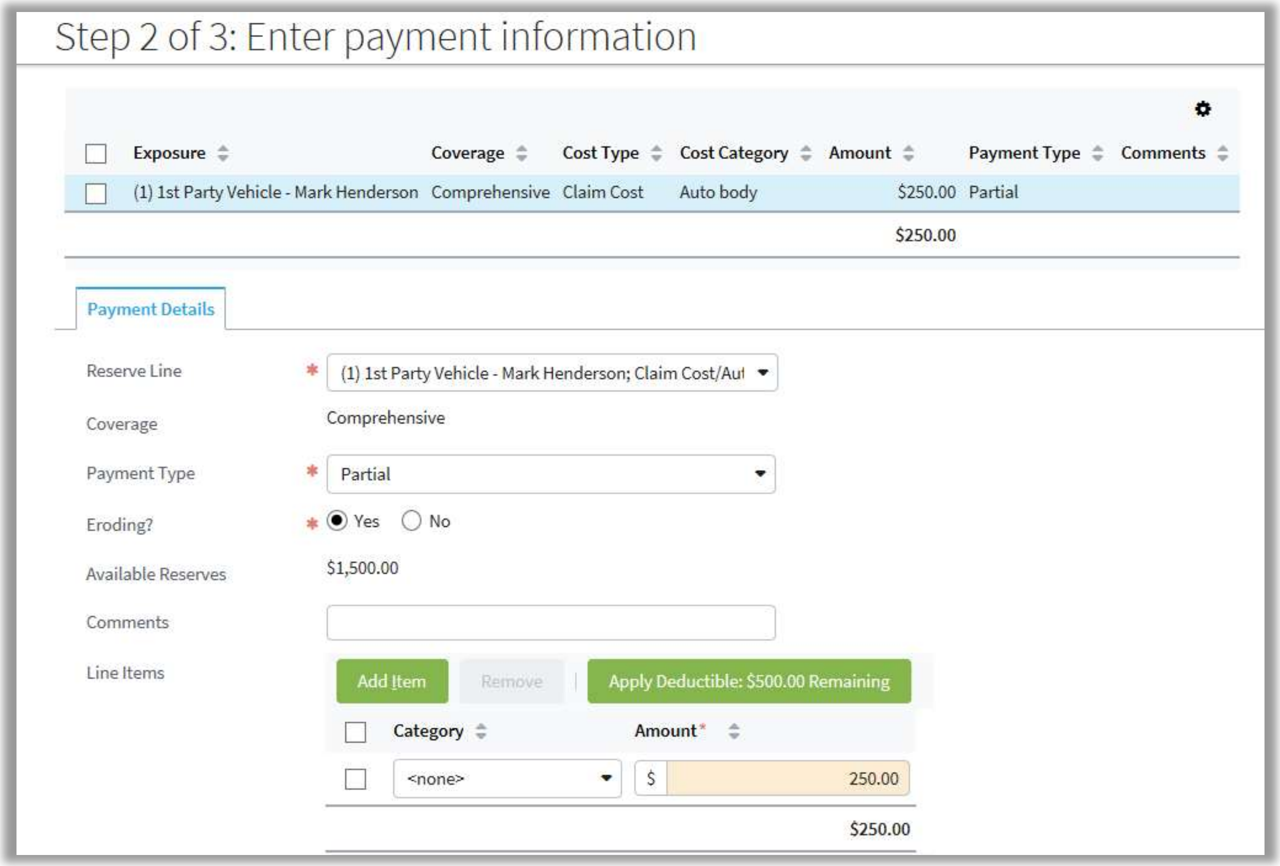

```
USES:
uses gw.api.locale.DisplayKey

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

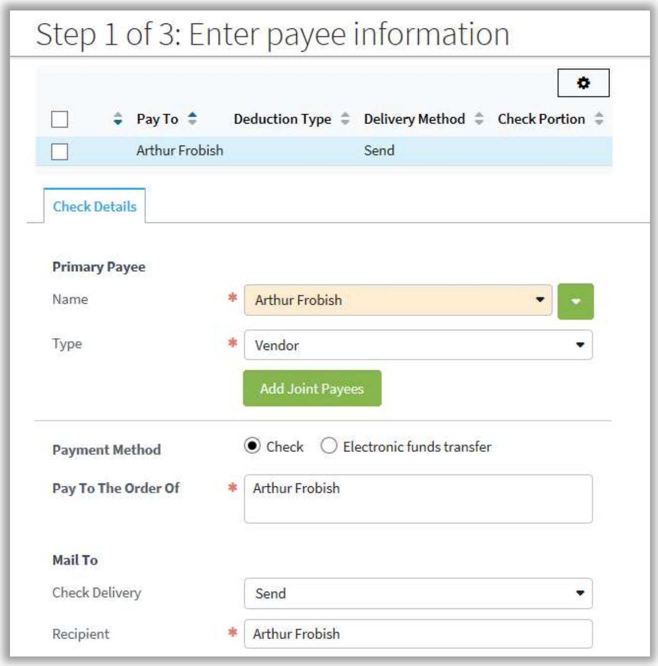


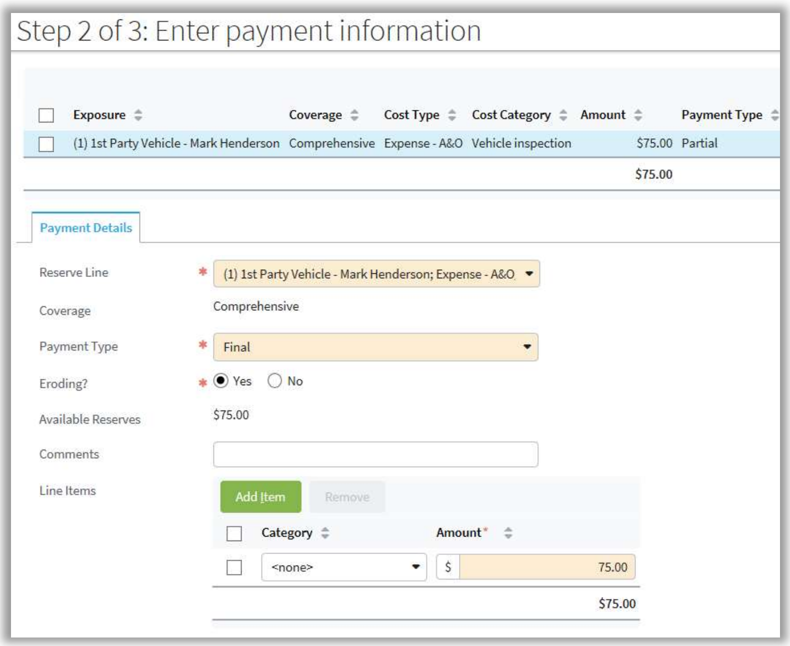


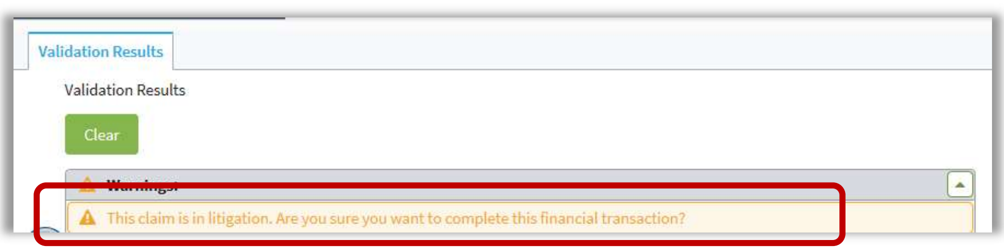

Step 1 of 3: Enter payee information
Pay To
Deduction Type
Delivery Method
Check Portion
Freeb's Auto Shoppe
Send
Check Details
Primary Payee
Name
Freeb's Auto Shoppe
Type
Vendor
Add Joint Payees
Payment Method
Check
Electronic funds transfer
Pay To The Order Of
Freeb's Auto Shoppe
Mail To
Check Delivery
Send
Recipient
Freeb's Auto Shoppe
Mailing Address
3215 Garfield, Alameda, CA 94502

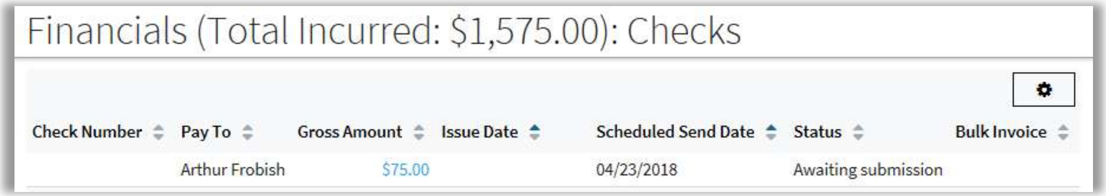

Step 2 of 3: Enter payment information
Exposure
Coverage
Cost Type
Cost Category
Amount
Payment Type
Comments
(1) 1st Party Vehicle - Mark Henderson
Comprehensive
Claim Cost
Auto body
$250.00
Partial
$250.00
Payment Details
Reserve Line
(1) 1st Party Vehicle - Mark Henderson; Claim Cost/Aut
Coverage
Comprehensive
Payment Type
Partial
Eroding?
Yes
No
Available Reserves
$1,500.00
Comments
Line Items
Add Item
Remove
Apply Deductible: $500.00 Remaining
Category
Amount
<none>
$
250.00
$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
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
(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
Category
Amount
<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?

STOP

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).**

STOP

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**.

STOP

3.4 Solutions

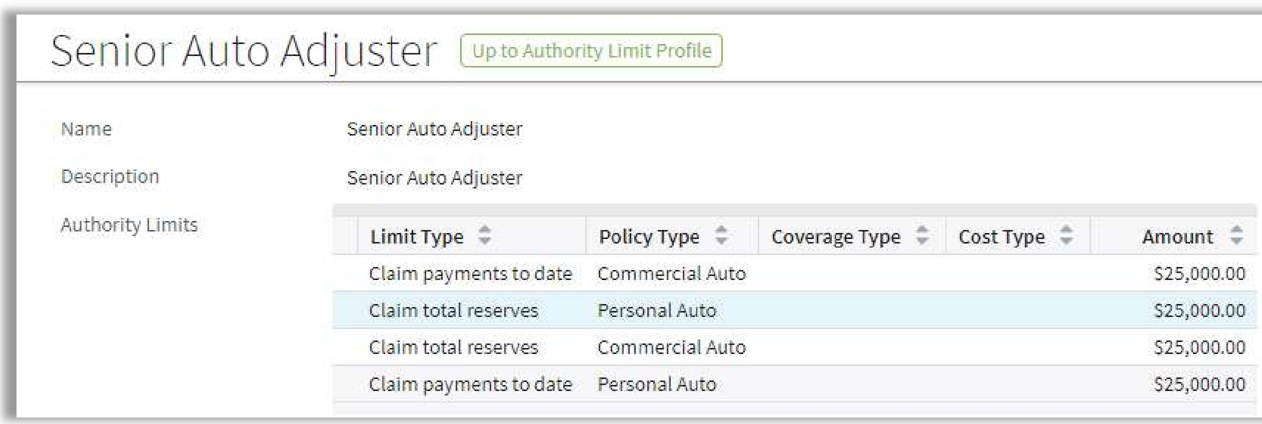
Solution

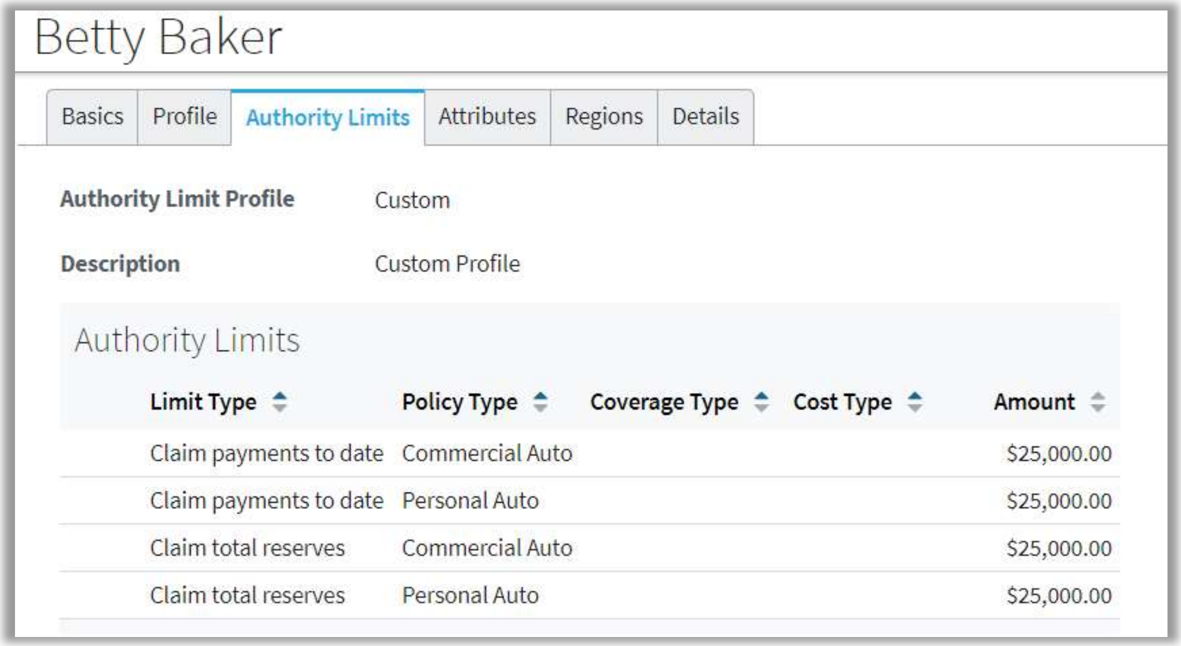
Exact details on how to complete the lab.

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*




Betty Baker

Basics | Profile | Authority Limits | Attributes | Regions | Details

Authority Limit Profile	Custom
Description	Custom Profile

Authority Limits

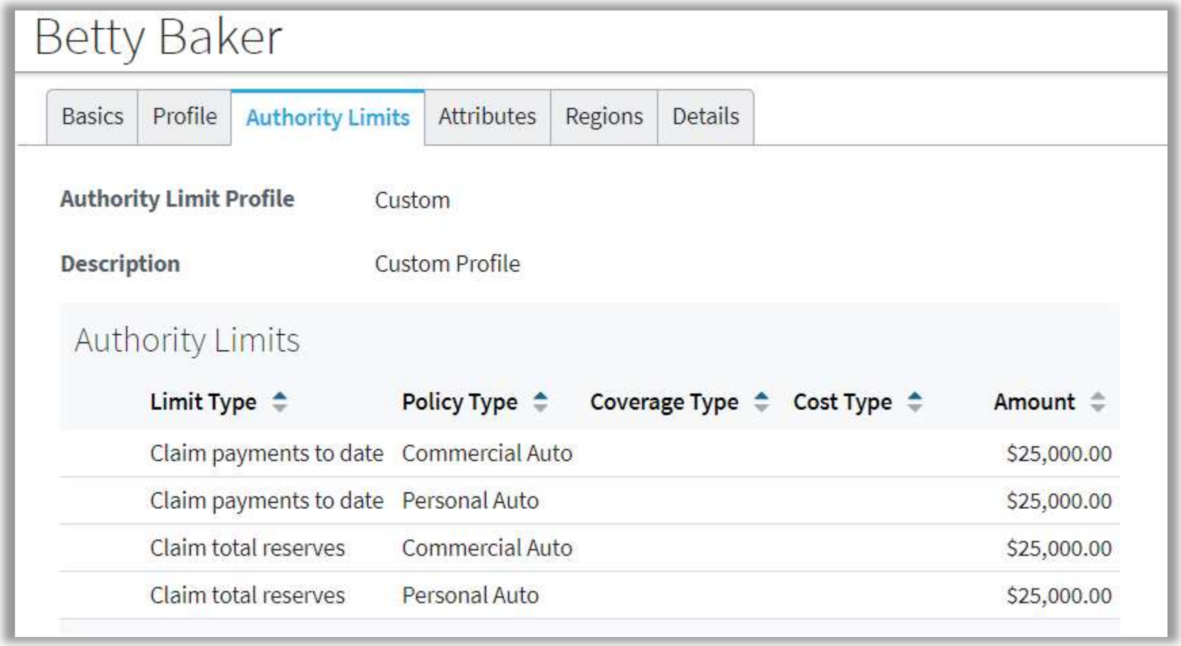
Limit Type	Policy Type	Coverage Type	Cost Type	Amount
Claim payments to date	Commercial Auto			$25,000.00
Claim payments to date	Personal Auto			$25,000.00
Claim total reserves	Commercial Auto			$25,000.00
Claim total reserves	Personal Auto			$25,000.00

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



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.**

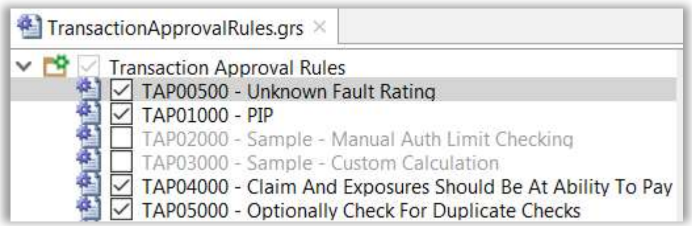
a) Note that you have a **Review and approve new payment** activity on the Brittany Turner claim. Open and approve it. What happens?

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?

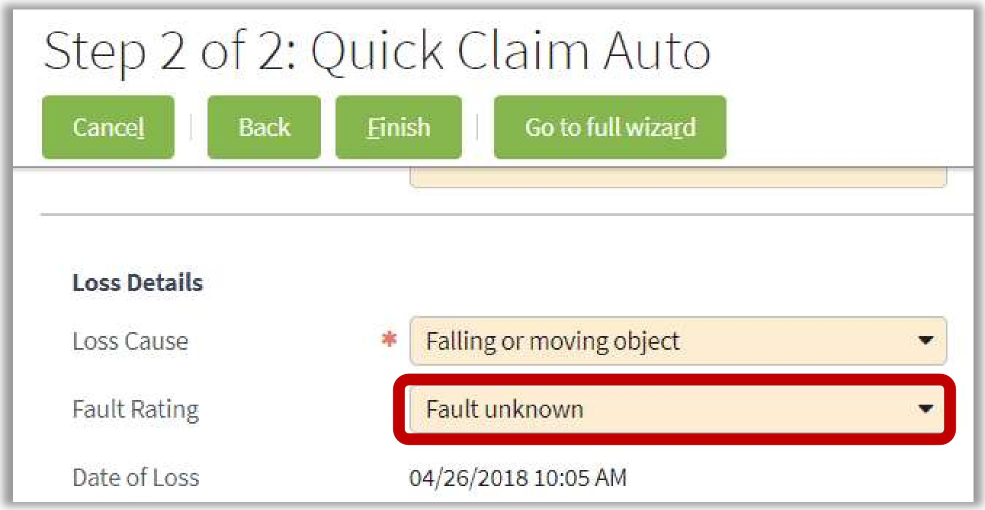
The check I sPending approval

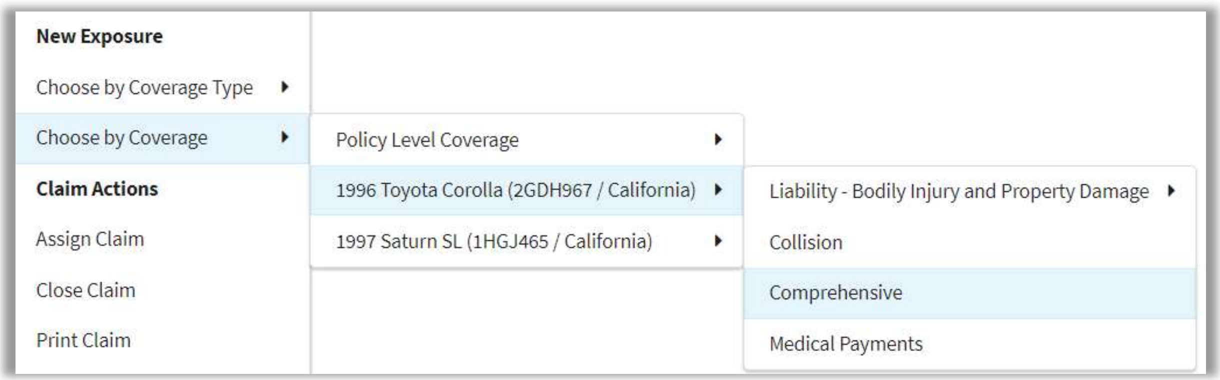
3.4.3 Approval for reserves when fault rating is unknown

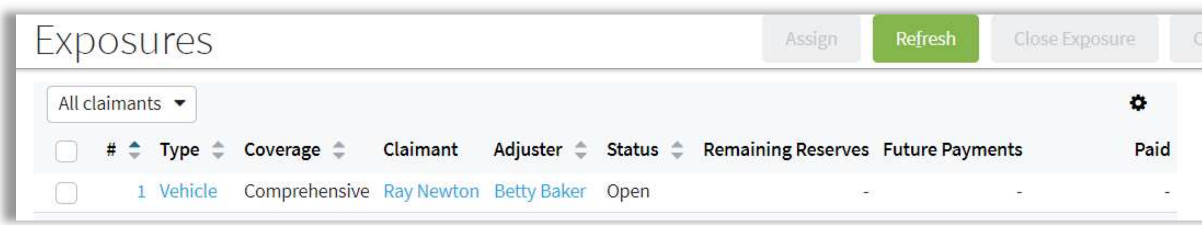


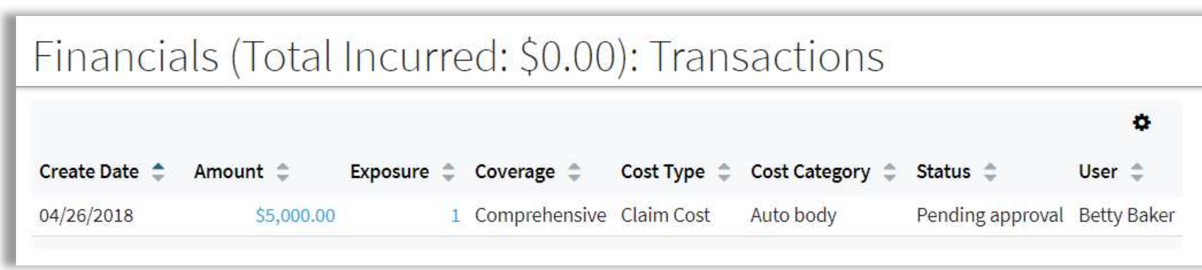

```
USES:
uses gw.api.locale.DisplayKey
uses typekey.*
uses typekey.TransactionSet

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









Workplan

Assign | Skip | Complete | Approve | Reject

All open activities

(1 - 1 of 1)

	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.
```

TransactionApprovalRules.grs

- Transaction Approval 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

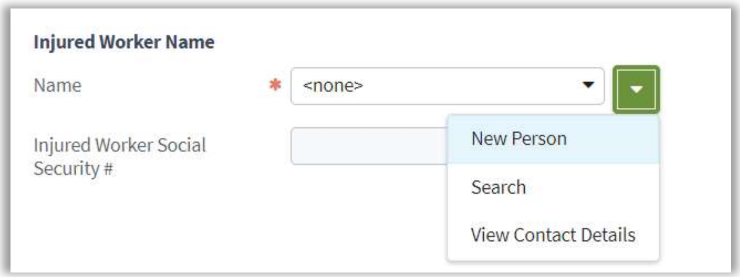
```
USES:
uses ...
CONDITION (transactionSet  :  entity.TransactionSet):
return transactionSet.Claim.FatalityClaimIndicator.IsOn and
    transactionSet.LastApprovingUser != (RuleGroups.instance.getHeadquartersSupervisor())
        and transactionSet typeis CheckSet
ACTION (transactionSet  :  entity.TransactionSet,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

END
```

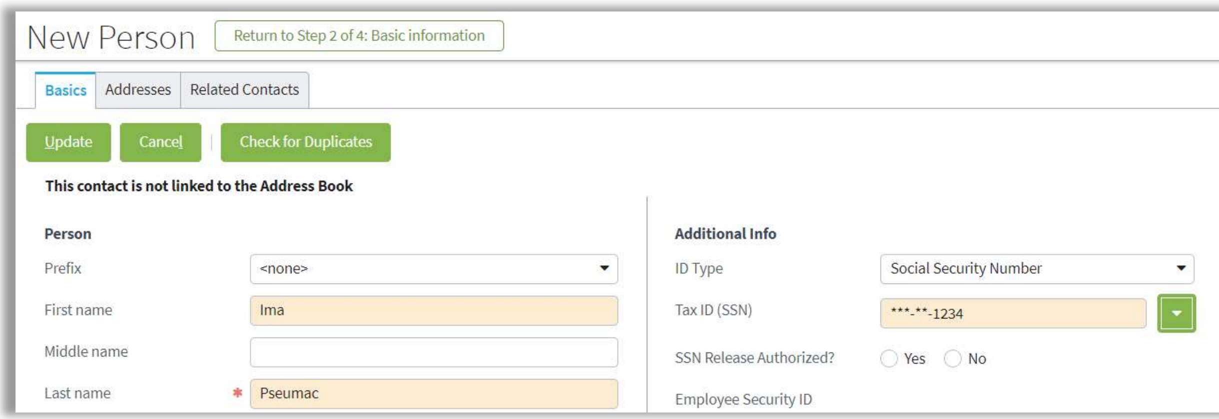
ApprovalRules.grs

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

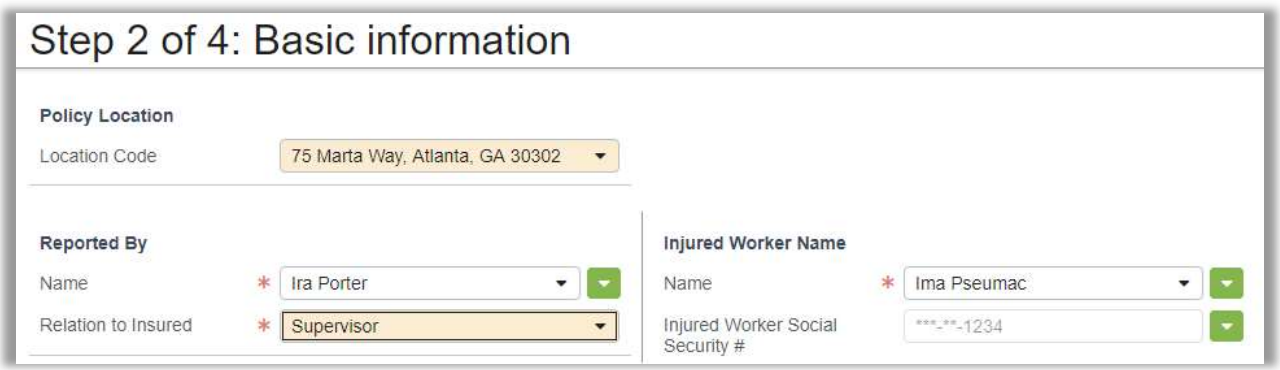
```
USES:

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
```

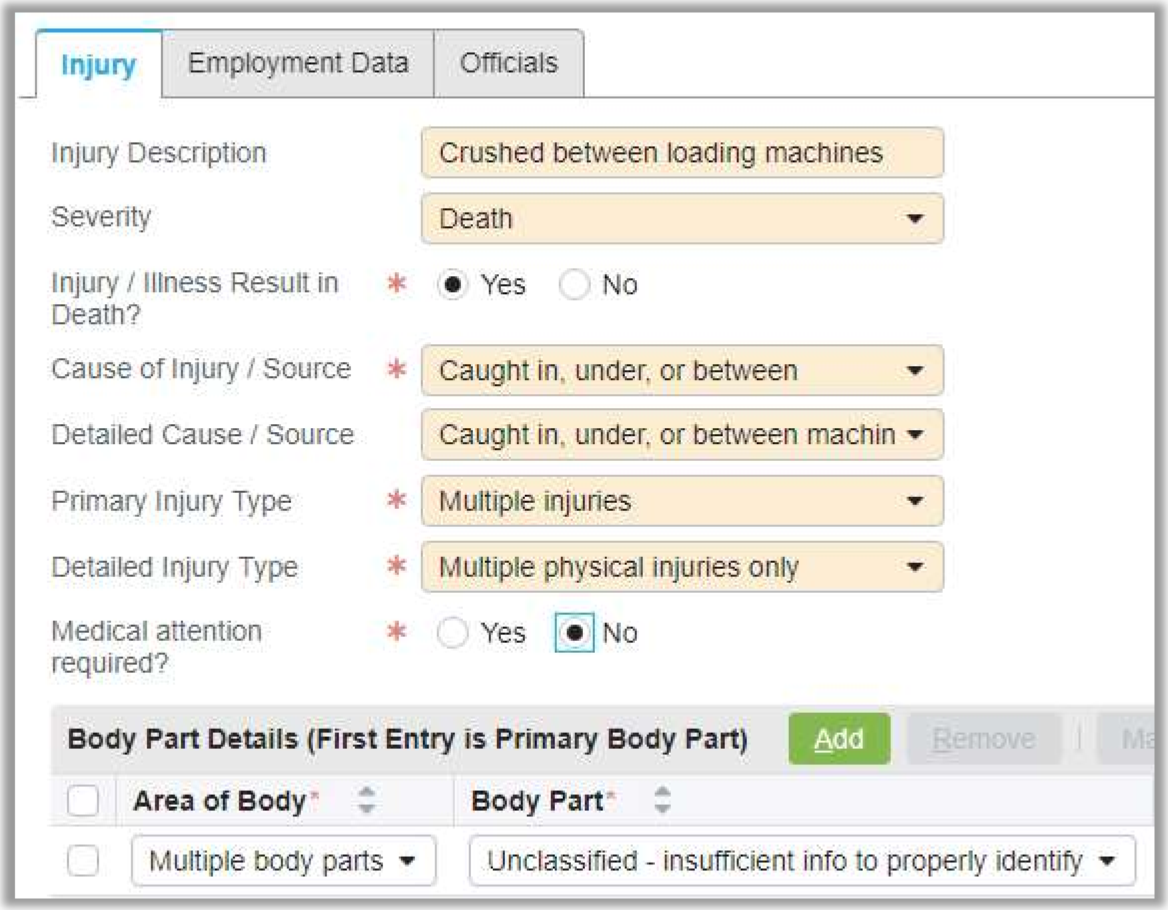
3.4.6 Test procedure

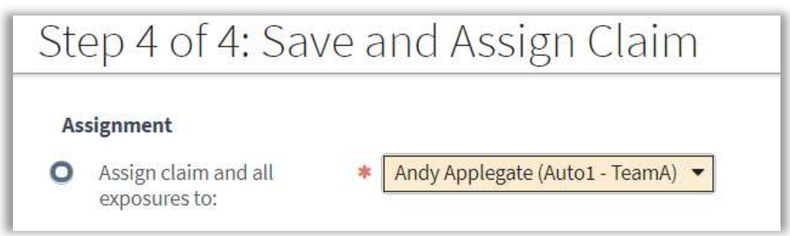


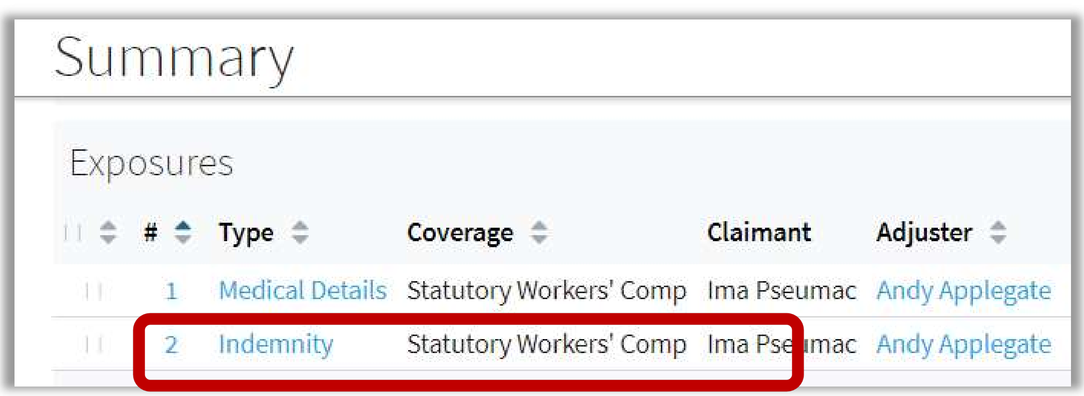


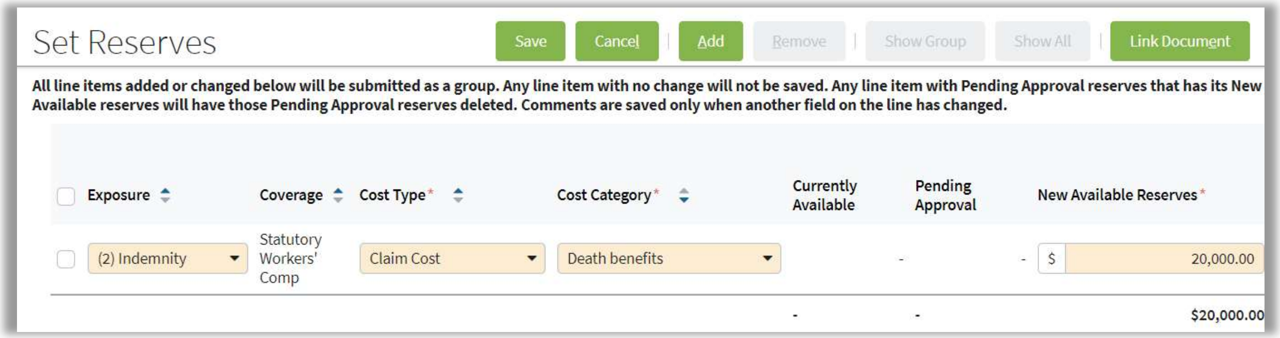

Primary Address
Country
United States
Address 1
1313 Mockingbird Heights
Address 2
Address 3
City
Alpharetta
County
State
Georgia
ZIP Code
30005-####

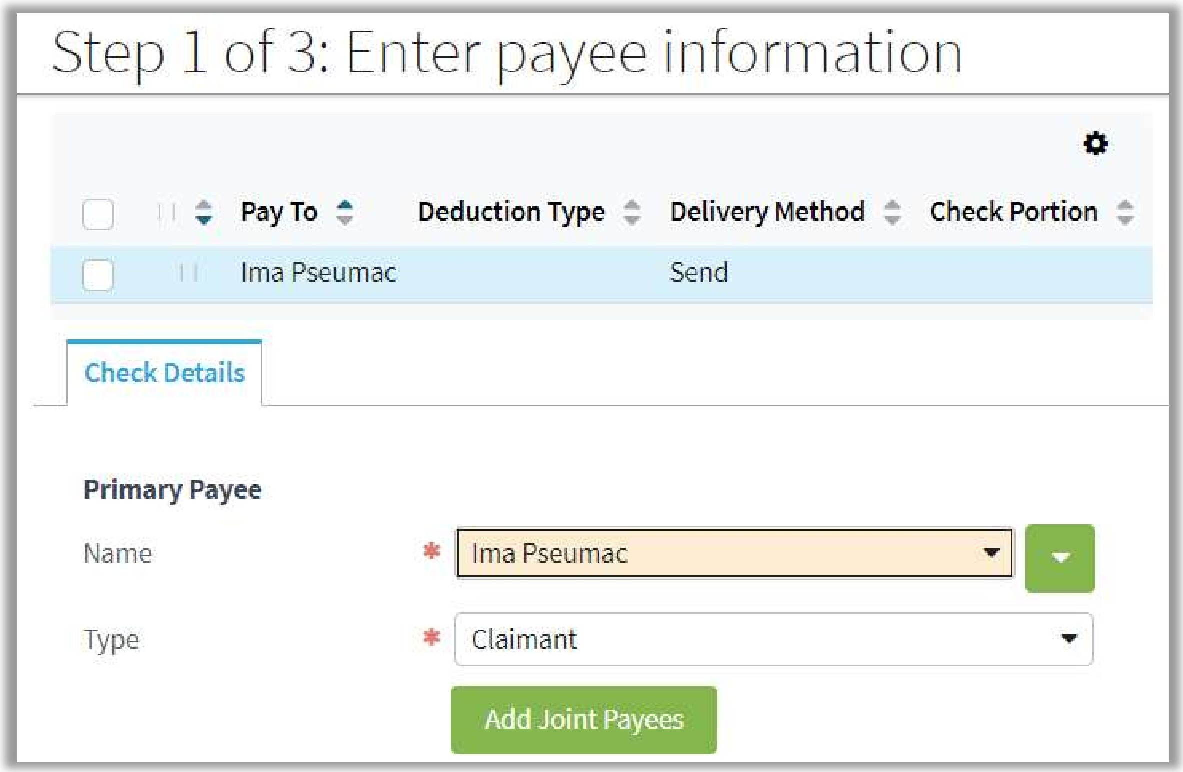

Step 2 of 4: Basic information
Policy Location
Location Code
75 Marta Way, Atlanta, GA 30302
Reported By
Name
Ira Porter
Relation to Insured
Supervisor
Injured Worker Name
Name
Ima Pseumac
Injured Worker Social Security #
***-**-1234

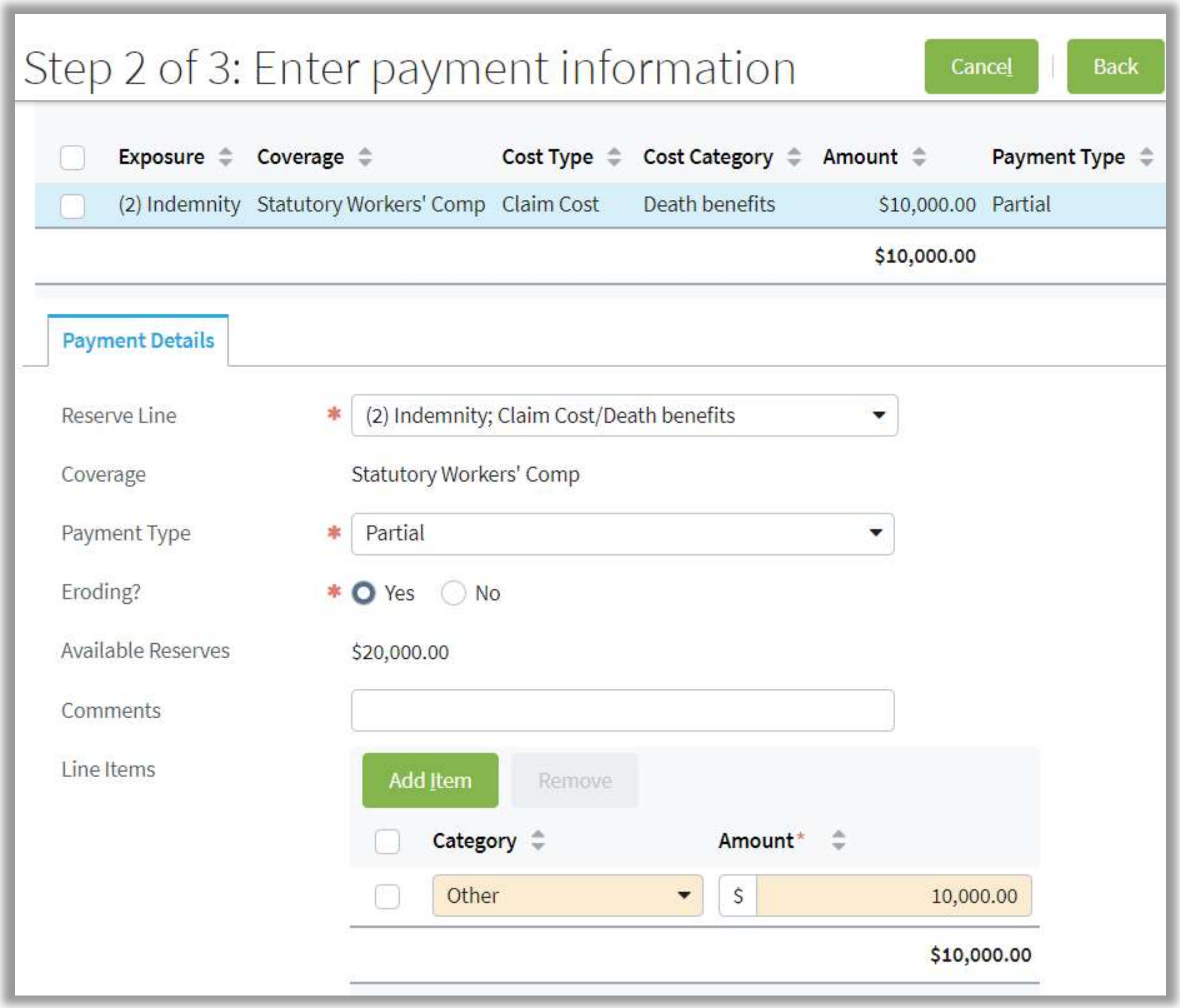

Injury
Employment Data
Officials
Injury Description
Crushed between loading machines
Severity
Death
Injury / Illness Result in Death?
Yes
No
Cause of Injury / Source
Caught in, under, or between
Detailed Cause / Source
Caught in, under, or between machin
Primary Injury Type
Multiple injuries
Detailed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

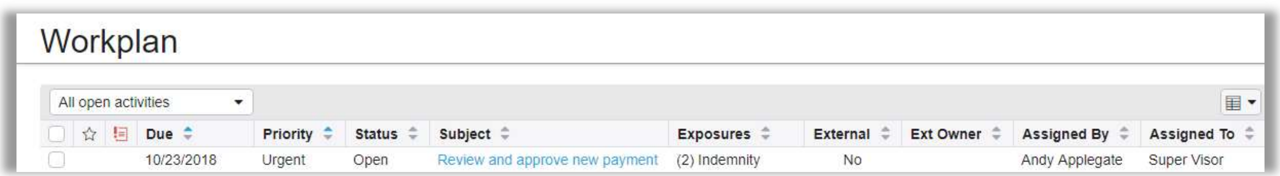

Step 4 of 4: Save and Assign Claim
Assignment
Assign claim and all exposures to:
Andy Applegate (Auto1 - TeamA)

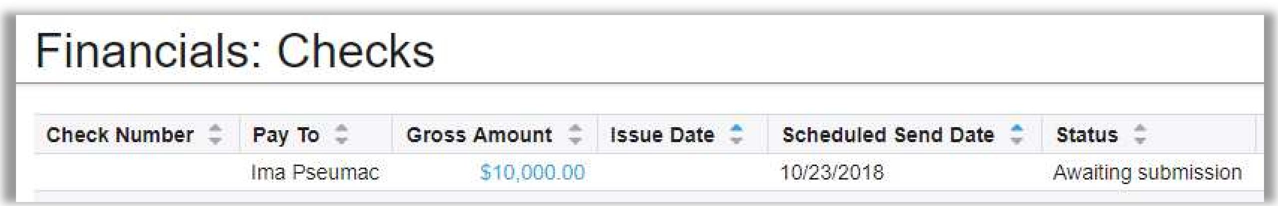

Summary
Exposures
Type Coverage Claimant Adjuster
1 Medical Details Statutory Workers' Comp Ima Pseumac Andy Applegate
2 Indemnity Statutory Workers' Comp Ima Pseumac Andy Applegate


Set Reserves
Save
Cancel
Add
Remove
Show Group
Show All
Link Document
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*
(2) Indemnity
Statutory Workers' Comp
Claim Cost
Death benefits
$
20,000.00
$20,000.00


Step 1 of 3: Enter payee information
Pay To
Deduction Type
Delivery Method
Check Portion
Ima Pseumac
Send
Check Details
Primary Payee
Name
Ima Pseumac
Type
Claimant
Add Joint Payees


Step 2 of 3: Enter payment information
Cancel
Back
Exposure
Coverage
Cost Type
Cost Category
Amount
Payment Type
(2) Indemnity
Statutory Workers' Comp
Claim Cost
Death benefits
$10,000.00
Partial
$10,000.00
Payment Details
Reserve Line
(2) Indemnity; Claim Cost/Death benefits
Coverage
Statutory Workers' Comp
Payment Type
Partial
Eroding?
Yes
No
Available Reserves
$20,000.00
Comments
Line Items
Add Item
Remove
Category
Amount*
Other
$
10,000.00
$10,000.00


Workplan
All open activities
Due
Priority
Status
Subject
Exposures
External
Ext Owner
Assigned By
Assigned To
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\sampledata\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.

STOP

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.

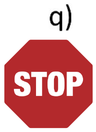
4.2.1 Lab

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

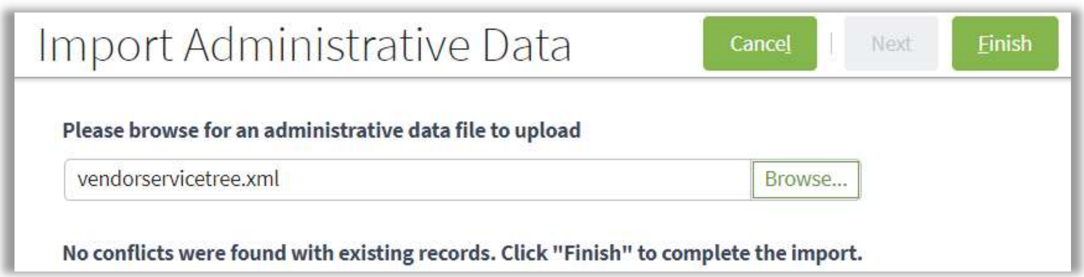
Exact details on how to complete the lab.

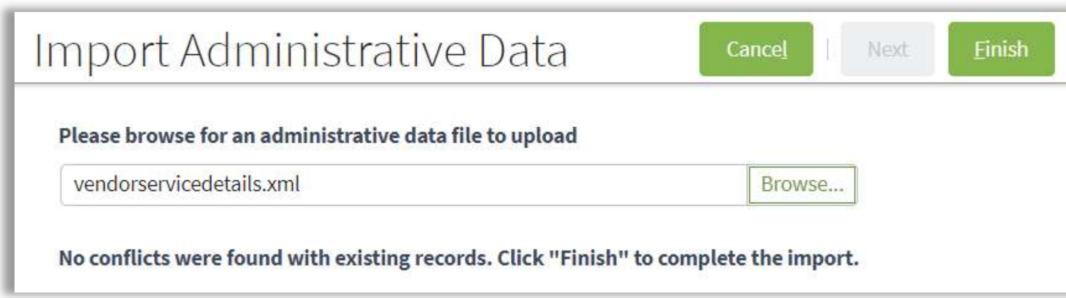
4.3.1 Adding services

```xml
  <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>
```

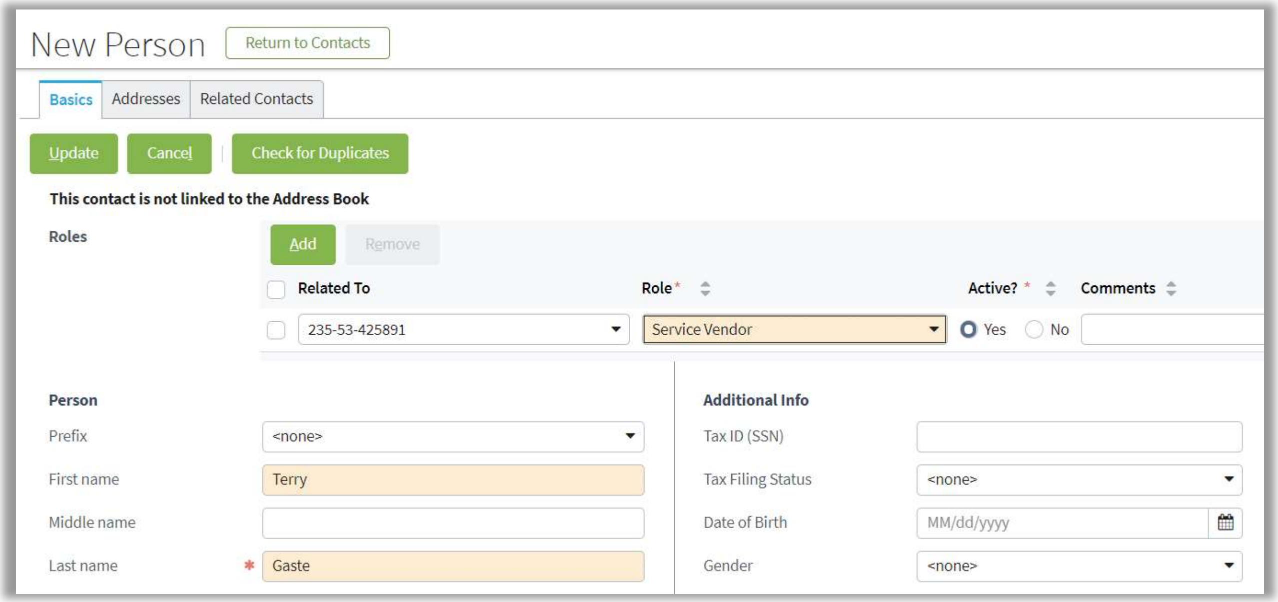
```xml
  <SpecialistServiceCompatibleServiceRequestKind public-id="cc:82">
    <Kind>quoteandservice</Kind>
    <Service public-id="svc:pers_interp"/>
  </SpecialistServiceCompatibleServiceRequestKind>
```

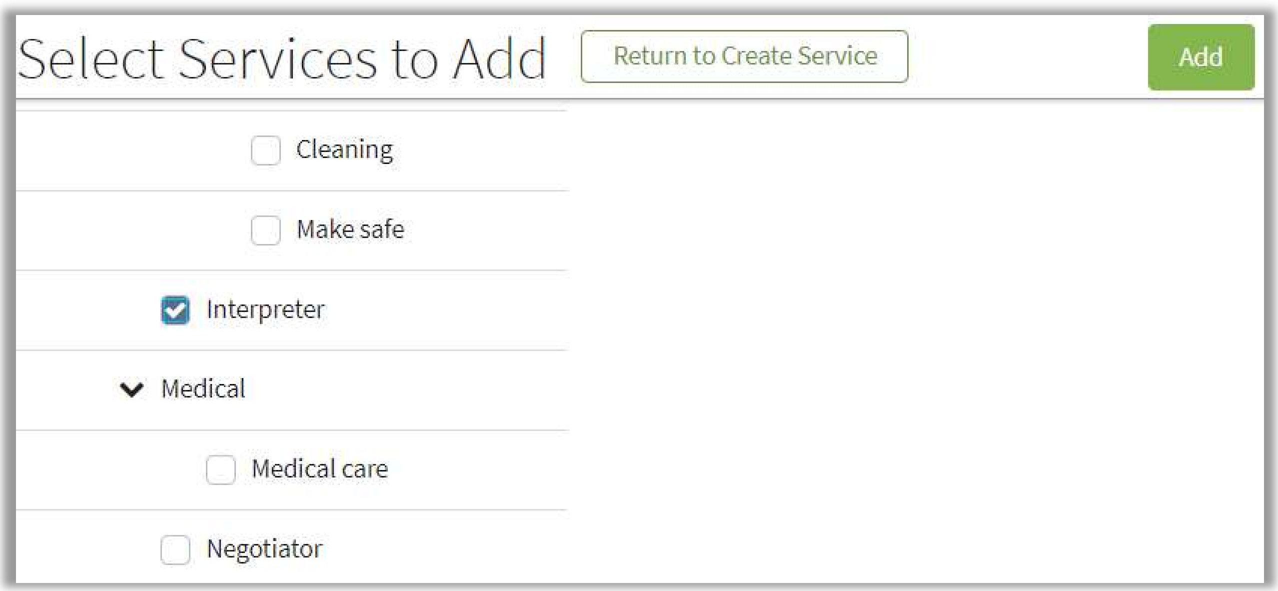
```xml
  <SpecialistServiceCompatibleIncidentType public-id="cc:27">
    <IncidentType>InjuryIncident</IncidentType>
    <Service public-id="svc:pers"/>
  </SpecialistServiceCompatibleIncidentType>
  <SpecialistServiceCompatibleIncidentType public-id="cc:28">
    <IncidentType>VehicleIncident</IncidentType>
    <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>
```





4.3.2 Test procedure



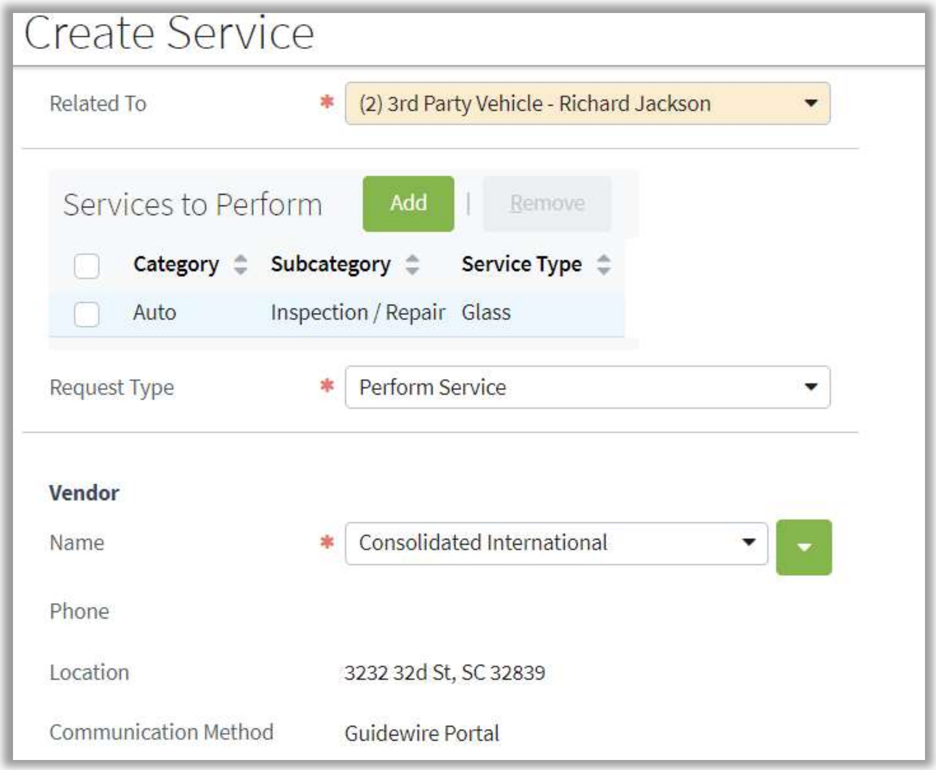


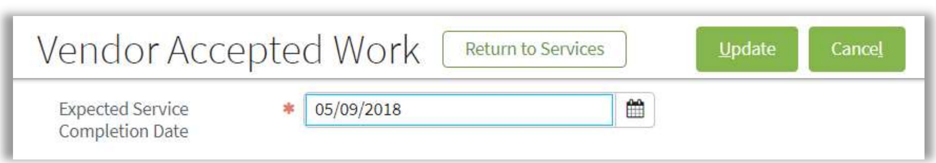
4.3.3 Invoices on flagged claims

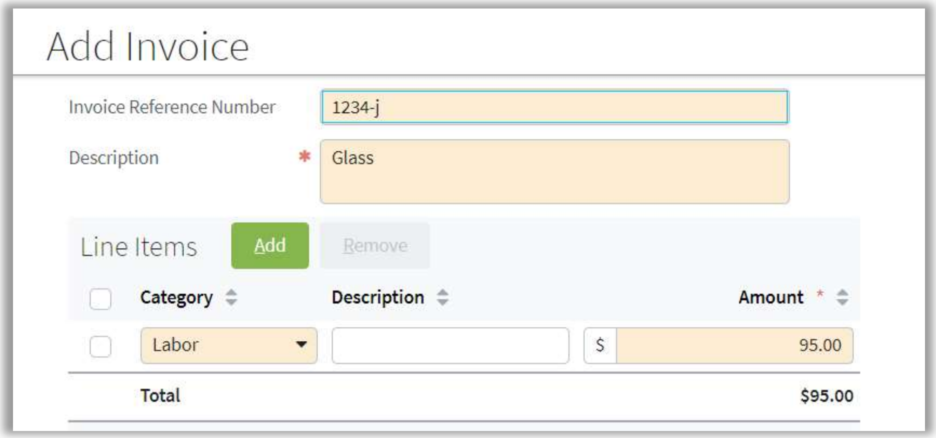
```
SI.Web.Plugin.InvoiceAutoApproveAutoPayPlugin.ClaimIsFlagged = The claim is currently flagged
```

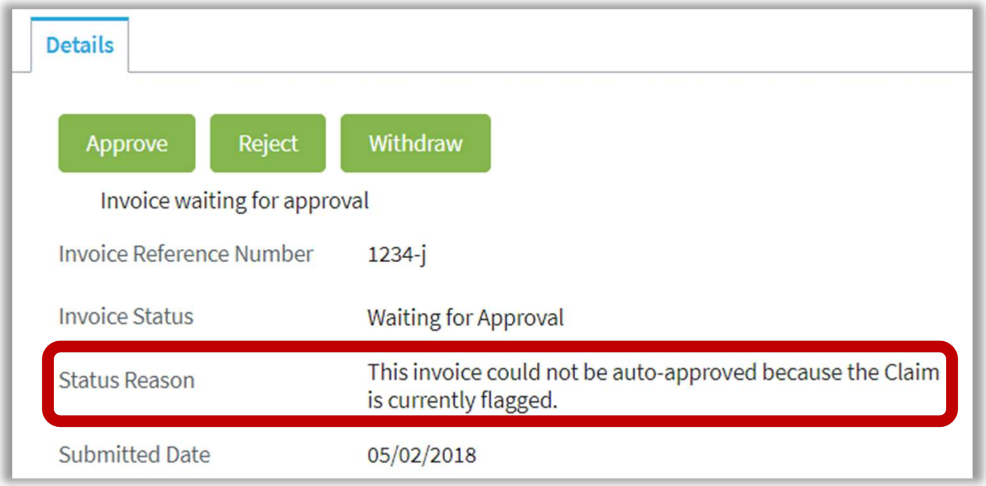
```
var failureReasons: List<String> = {}

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






Add Invoice
Invoice Reference Number
1234-j
Description
Glass
Line Items
Add
Remove
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.**

name	**PercentComplete_SI**
type	**percentagedec**
nullok	**false**
desc	**Percentage of claim that is complete**
Default	**50**

2. **Add the PercentComplete_SI field to ClaimSearchCritera.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.**
   a) Add it to the ClaimSearchCriteria <CriteriaDef> whose targetEntity is **Claim**.
   b) 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.mathBigDecimal**

   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 | search-config.xml

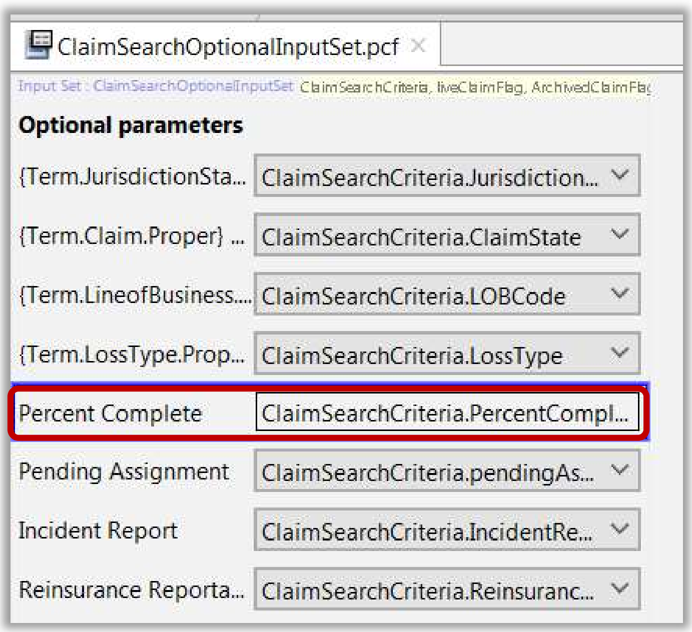
columnParam | Show All

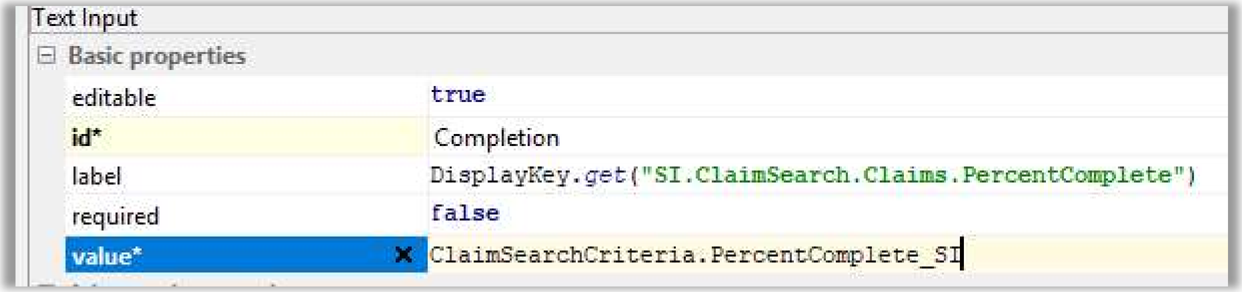
Element	Primary Value	Secondary Value
extension	ClaimSearchCrite...	
column	Fault	percentagedec
column	PercentComplete...	percentagedec
implementsI	gw.cc.claim.entit...	com.guidewire.c...

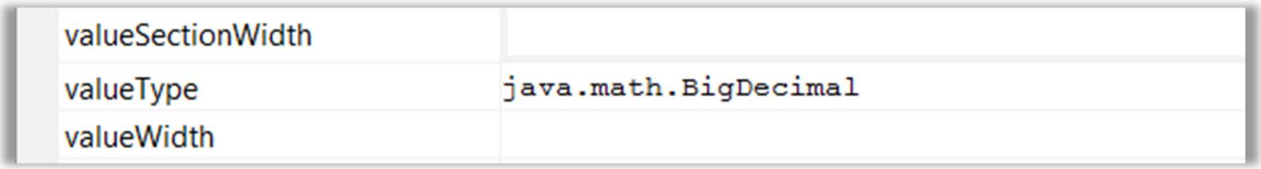
Name	Value
name	PercentComplete_SI
type	percentagedec
nullok	true
desc	Percent of claim that is completed

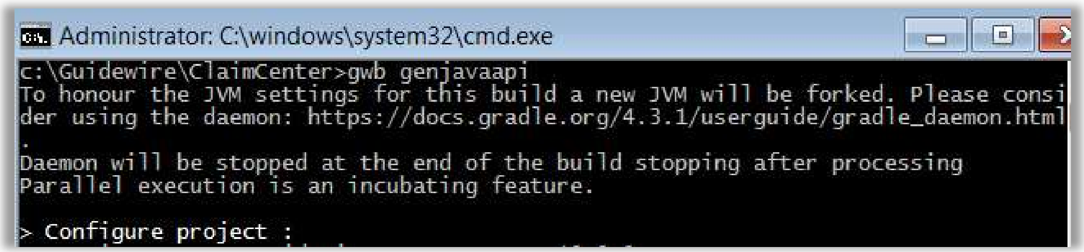
```
<CriteriaDef entity="ClaimSearchCriteria" targetEntity="Claim">

  <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"/>
```

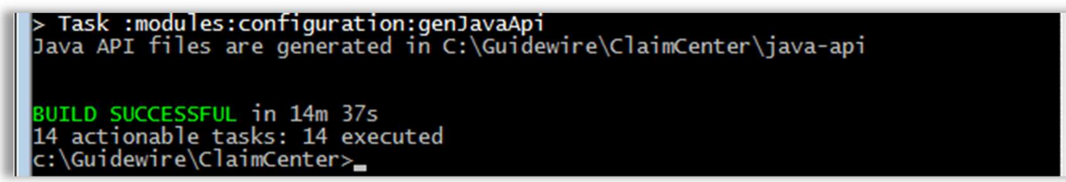
```
SI.ClaimSearch.Claims.PercentComplete = Percent Complete
```





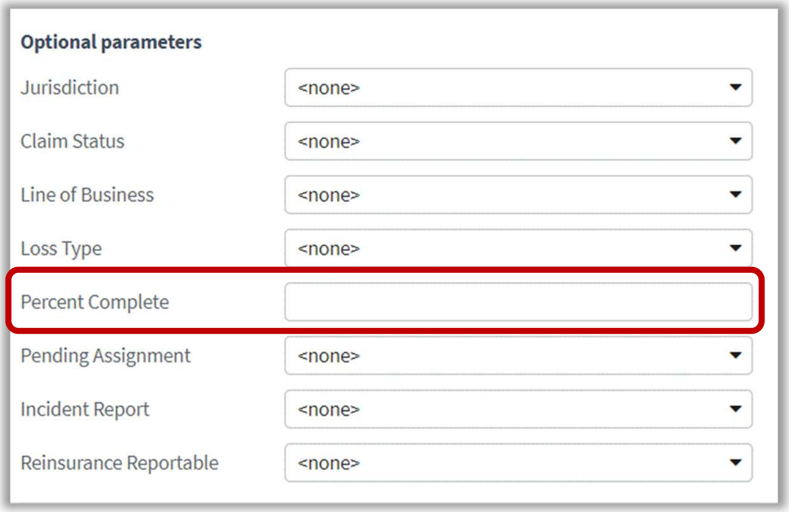






5.2.2 Test procedure

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.**



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.**

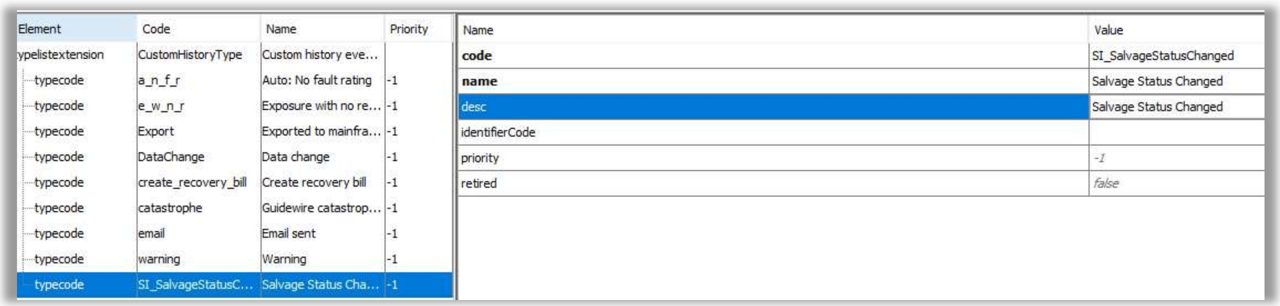
7. **Click Update.**
8. **In the sidebar, select History.**
9. **Verify that the “Salvage status changed” entry is present at the top of the History list.**

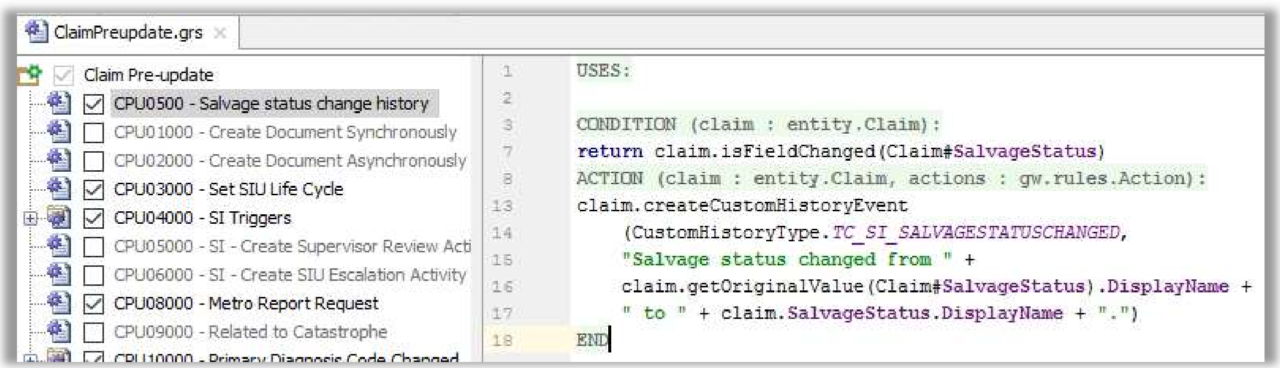
6.2 Solutions

Solution

Exact details on how to complete the lab.

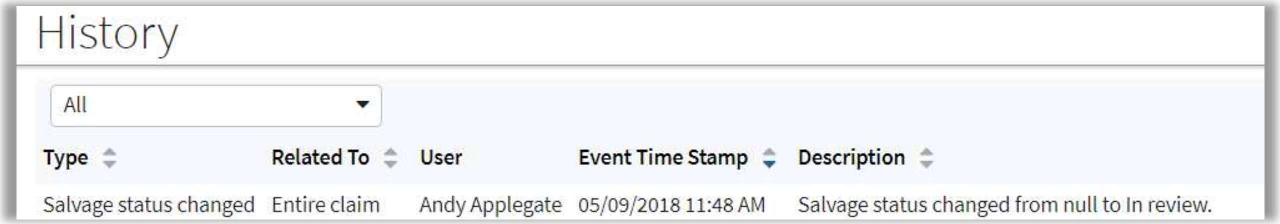
6.2.1 Track changes to salvage status field





6.2.2 Test procedure

GUIDEWIRE


History
All
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.

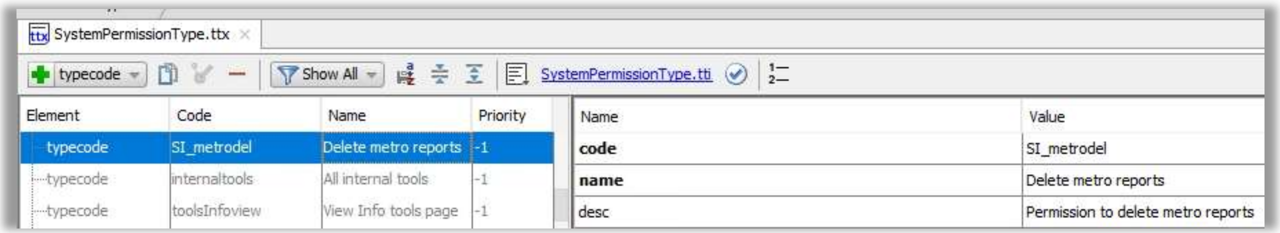
STOP

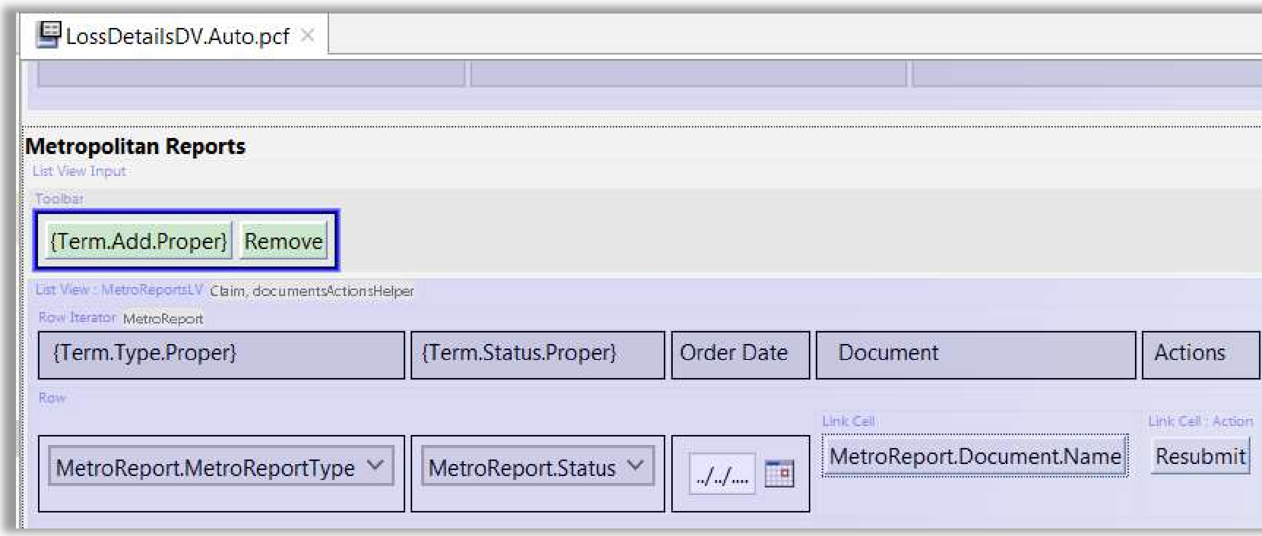
7.3 Solution

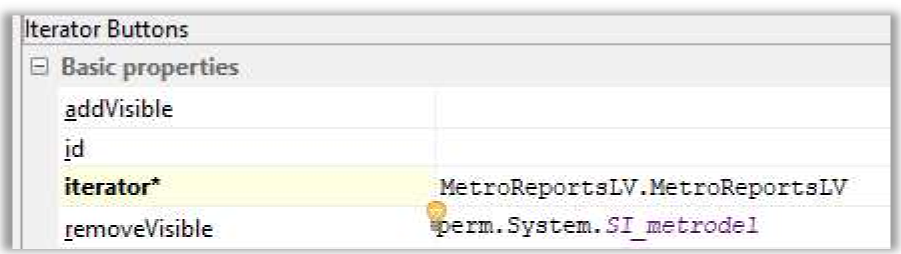
Solution

Exact details on how to complete the lab.

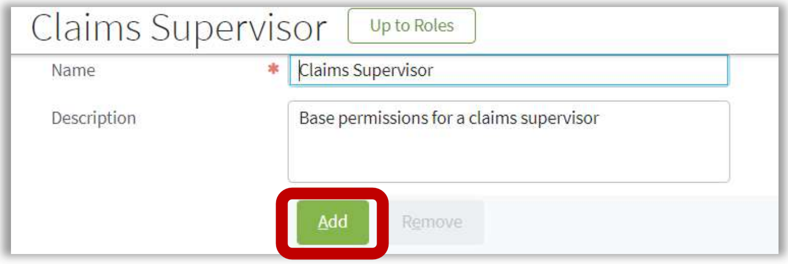
7.3.1 Limit ability to remove Metro Reports

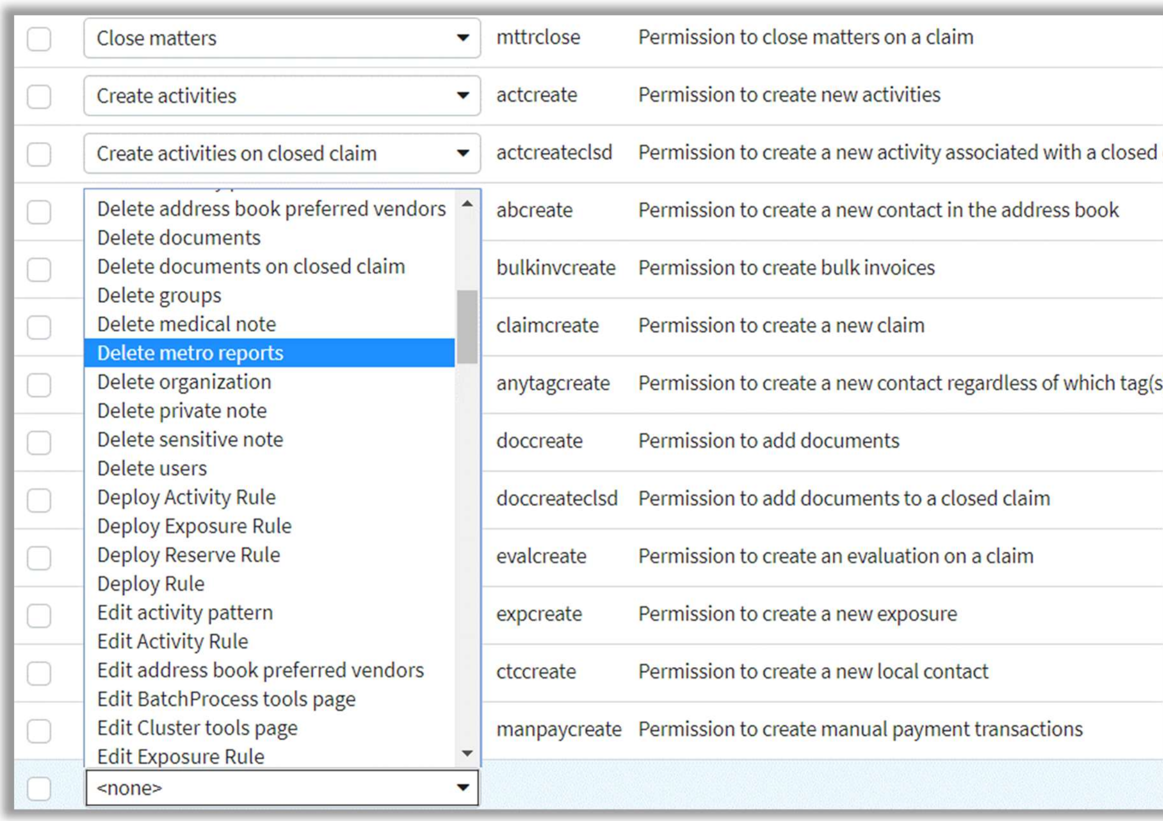




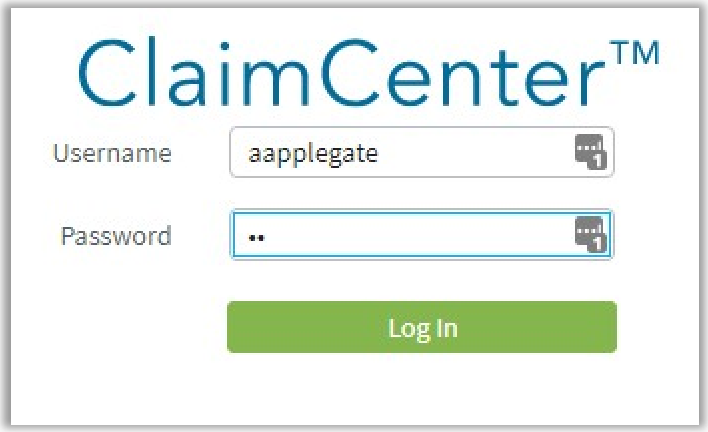


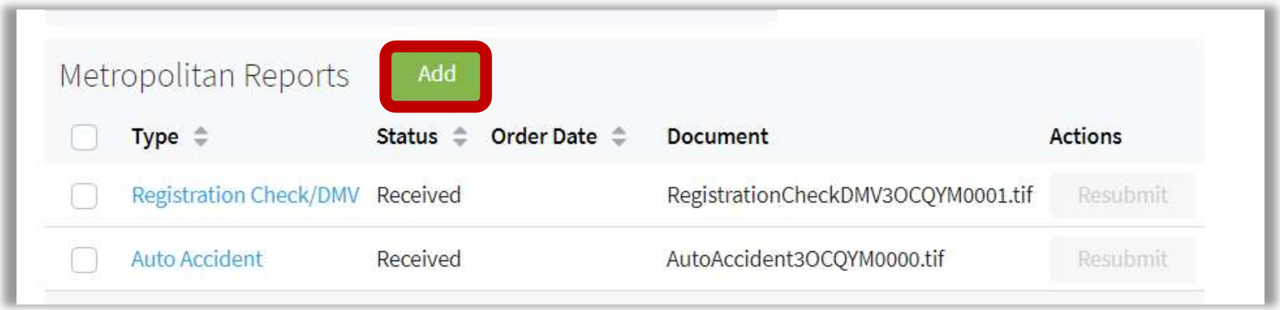

Claims Supervisor
Up to Roles
Edit
Basics
Users
Role
Name
Claims Supervisor
Description
Base permissions for a claims supervisor

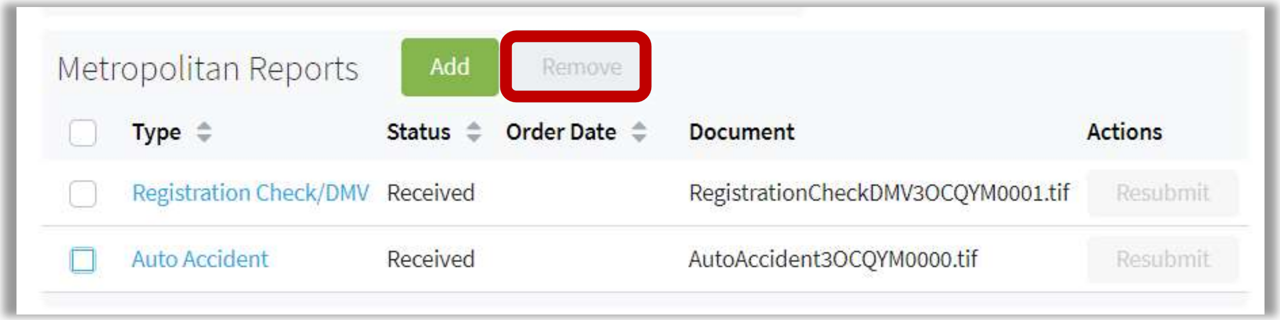

Claims Supervisor
Up to Roles
Name
Claims Supervisor
Description
Base permissions for a claims supervisor
Add
Remove


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

7.3.2 Test procedure







7.3.3 Bonus task

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 Student*XX*, 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.

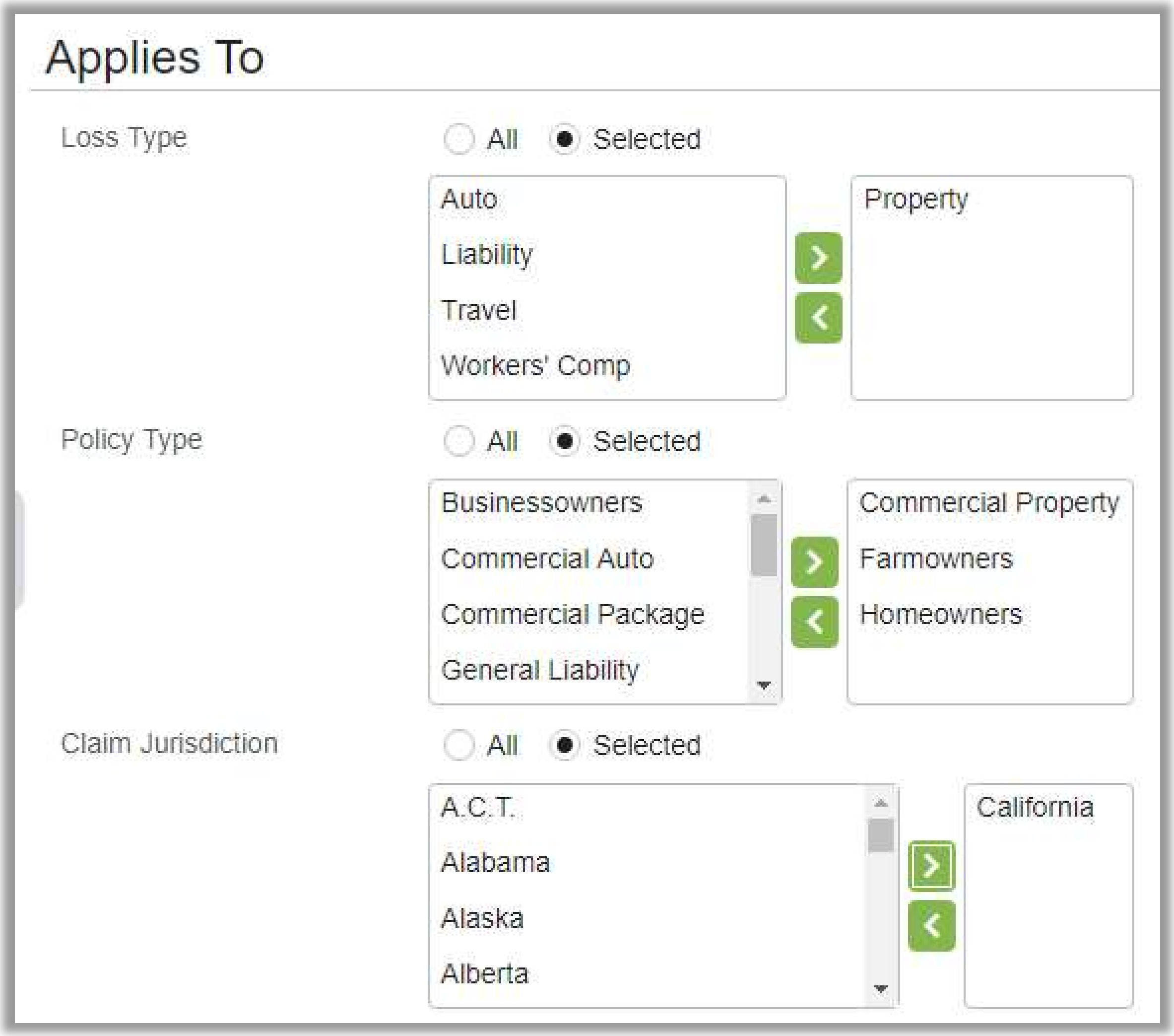
STOP

8.2 Solution

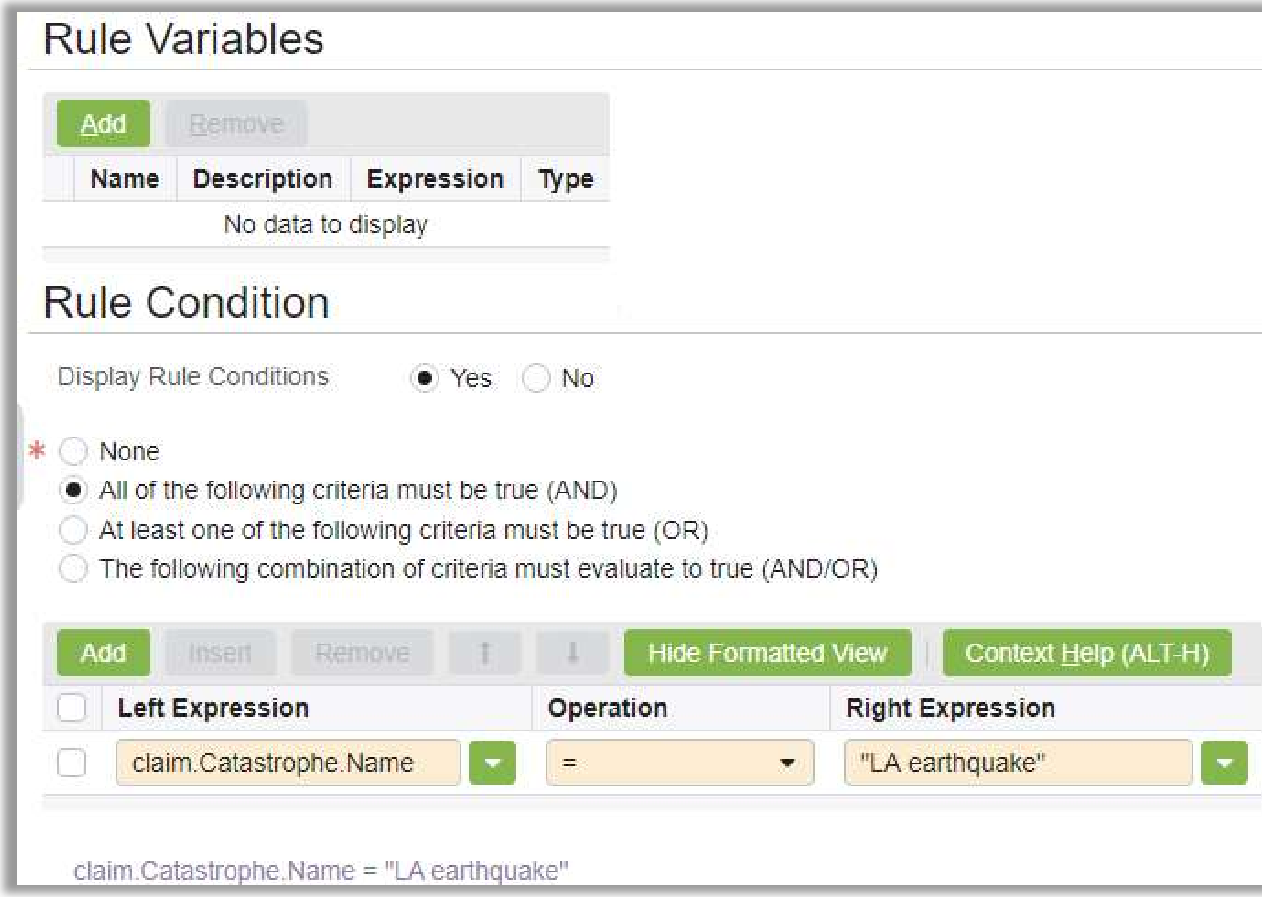
Solution

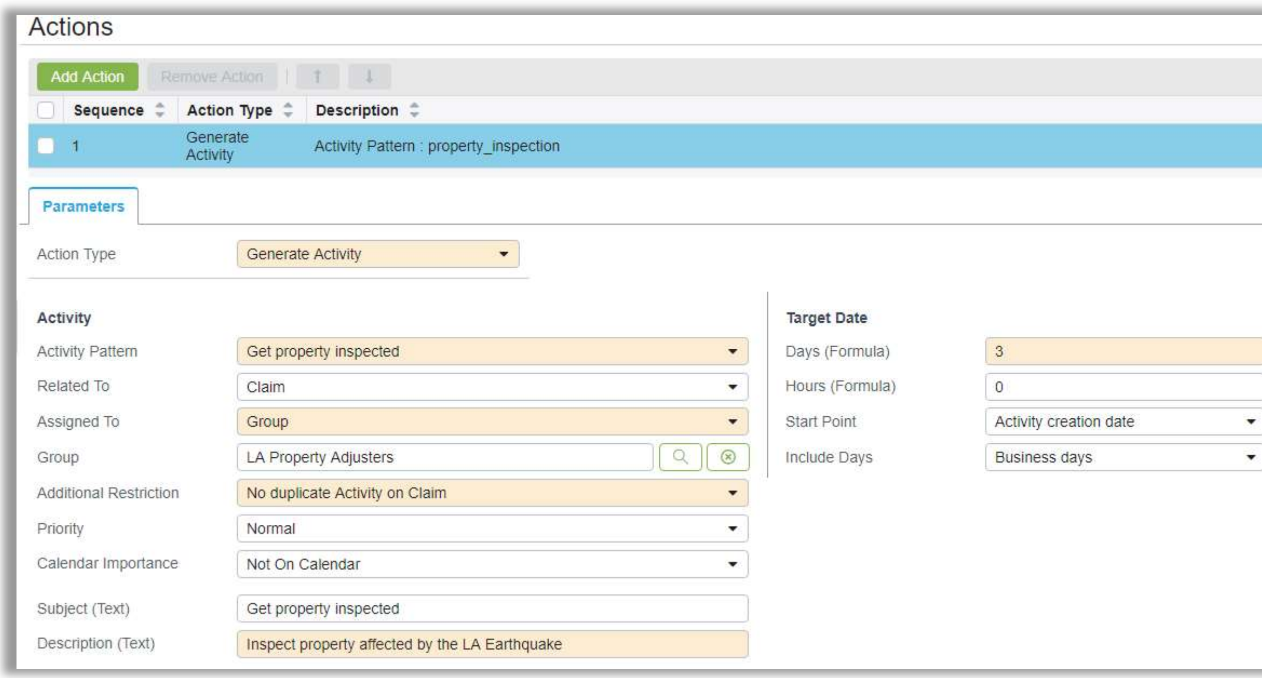
Exact details on how to complete the lab.

8.2.1 Catastrophe rule

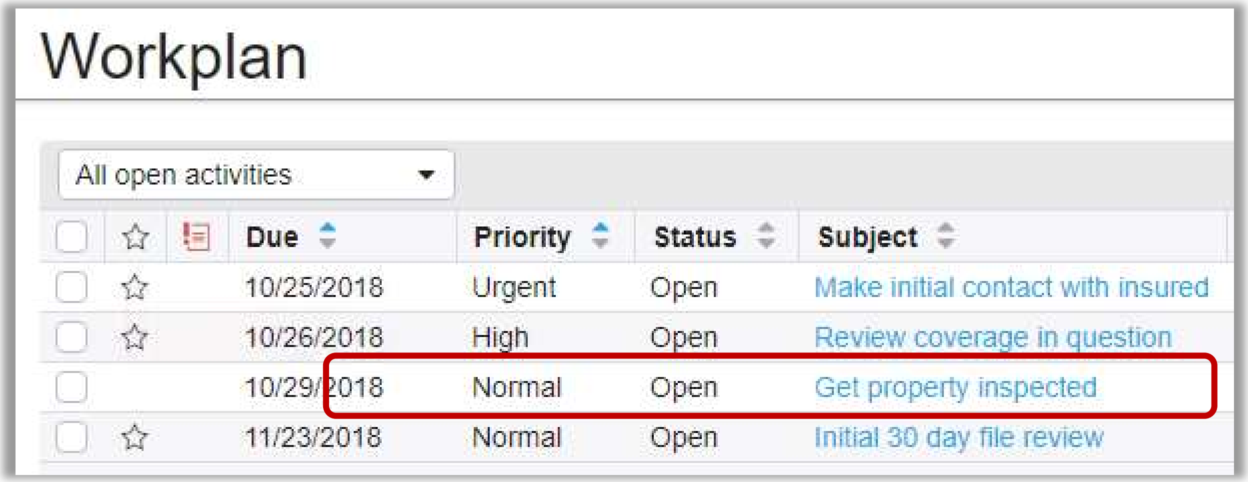

Applies To
Loss Type
All
Selected
Auto
Liability
Travel
Workers' Comp
Property
Policy Type
All
Selected
Businessowners
Commercial Auto
Commercial Package
General Liability
Commercial Property
Farmowners
Homeowners
Claim Jurisdiction
All
Selected
A.C.T.
Alabama
Alaska
Alberta
California

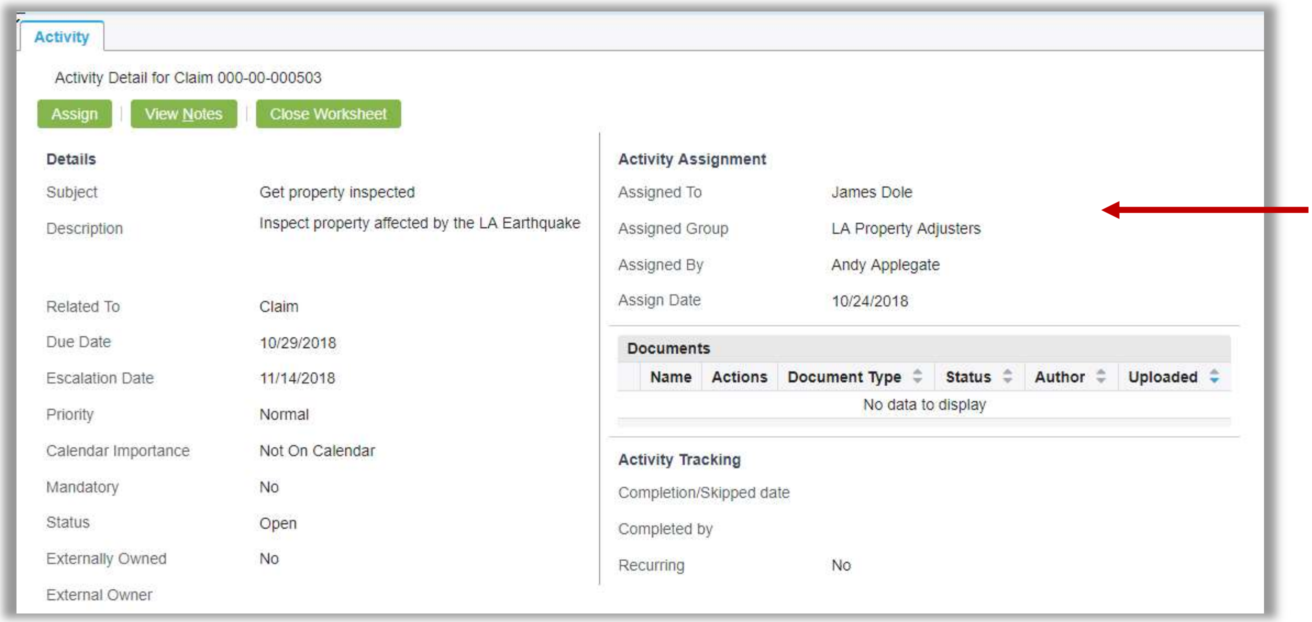
GUIDEWIRE


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)
Left Expression
Operation
Right Expression
claim.Catastrophe.Name
=
"LA earthquake"
claim.Catastrophe.Name = "LA earthquake"


Actions
Add Action
Remove Action
Sequence
Action Type
Description
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





GUIDEWIRE