

# Insurance Claims Handling

December 13, 2006

Michael Austin

Background:  
<information on industry needs filled by this offering>



Role 1: Jennifer Tibet, Customer Service Rep (CSR)

Step 1: Select her cartouche to begin her handling of the call.

Story: A call comes into the call center and is routed to Jennifer, one of the CSRs on call.

# Insurance Claims Handling



## Innovative Insurance



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Step 2: Log into Jennifer's portal location

Story: Everything Jennifer needs to process the call is handled inside of her portal.




Step 3: Go into the 'My Workplace' tab

Story: The tools Jennifer needs are all in her workplace

The screenshot shows the 'My Workplace' dashboard for Jennifer Tibet, a Customer Service Representative. The dashboard is organized into several sections:

- Header:** Includes the Innovative Insurance logo with the tagline 'thinking outside the box', user name 'Jennifer Tibet, Customer Service Rep', and navigation links for Logout, FAQs, Site Map, Edit Profile, Personalize Desktop, and Help.
- Navigation:** A horizontal menu with tabs for Home, My Workplace (highlighted with a red circle), My Tasks, My Reports, My Dashboard, Help, and My Favorites.
- Sametime:** A section for real-time communication, including 'I am Active' (listing Matthias Kramer, Scott Wayman, Maya Valentine), Client Contacts (listing Seymour Business, Colin Freeman), and an 'Open Calendar' button.
- Calendar:** A 'Todays Calendar' showing events for the current day: 9:30 am Weekly Status Meeting, 11:00 am Recognition Luncheon, and 2:00 pm All Hands Call.
- Top Stories:** A list of news items, including 'Innovative Insurance Responds to Hurricane Katrina', 'The Innovative Insurance Foundation Establishes \$1 Million Hurricane Recovery Fund', 'Social Responsibility Report', 'Going beyond what's expected', 'Quick service key to customer loyalty', 'An attitude that makes the difference', 'Fraud Investigator puts customer first', 'Community Newsletter', and 'Innovative Insurance Matching-Donation Program Raised More than \$1.5 Million for Tsunami Disaster Recovery'.
- Alerts:** A section for notifications, including two 'Attention' alerts: 'Cross-Sell Exceeds Threshold!' and 'Complete your 2007 Benefits Plan Enrollment'.
- Email:** A summary of email statistics: New Messages\*, Inbox: 25 Messages (5 new), Draft: 3 saved, Sent: 32 messages, and Trash: 32 total.

Step 4: Select the top call on the call list queue.



[Logout](#) | [FAQs](#) | [Site Map](#) | [Edit Profile](#) | [Personalize Desktop](#) | [Help](#)

**Jennifer Tibet**, Customer Service Rep

[Home](#) | **[My Workspace](#)** | [My Tasks](#) | [My Reports](#) | [My Dashboard](#) | [Help](#) | [My Favorites](#)

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Call List** Edit | ? - X

Name	Policy Number	Request Type	Time in Queue	Take Call
Mary Frazets	321456798	New Auto Claim	4min	<b>Take Call</b>
Della Horne	524317689	New Home Claim	3min	Take Call
Billie R. Kelly	983762514	Current Auto Claim	1min	Take Call
Rajiv Sanooth	264512839	Policy Update	23sec	Take Call

**Map Info** Edit | ? - X

Address or Intersection

City

State  Zip

OR  Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Matthias Kramer
  - Scott Wayman
  - Maya Valentine
- Client Contacts
  - Seymour Business
  - Colin Freeman

Step 5: Fill out the form and open the policy holder profile.

Story: Jennifer takes the information from the caller to create a new claim.

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thinking outside the box ©

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Jennifer Tibet, Customer Service Rep

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

### Calendar

Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

### Map Info

Edit | ? - X

Address or Intersection

City

State  Zip

OR  Recent Searches

Get Map Auto Fill

### Sametime

Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Matthias Kramer
  - Scott Wayman
  - Maya Valentine
- Client Contacts

### New Claim

Edit | ? - X

Date reported: 11/13/2006  
Call start: 11:04:55

Name of caller:

Date and time of occurrence:

Type of claim:  Automobile  Home  Life

Injuries:  Yes  No

First Name:

Last Name:

Where you driving:  Yes  No

Contact number:

Policy number:

[Open Policy Holder Profile](#)

Step 6: Review the information and then continue further into the claim process.

Jennifer Tibet, Customer Service Rep

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites ▾

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State

 Zip

OR Recent Searches ▾

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

Claim Agents

- Matthias Kramer
- Scott Wayman
- Maya Valentine

**New Claim** Edit | ? - X

Date reported: 11/13/2006  
Call start: 11:04:55  
Name of caller: Mary Frazets  
Date and time of occurrence: 11/13/2006, 11:04  
Type of claim:  Automobile  Home  Life  
Injuries:  Yes  No  
First Name: Mary  
Last Name: Frazets  
Where you driving:  Yes  No  
Contact number: 555-333-5252  
Policy number: 321456798

Open Policy Holder Profile

**Policy Holder Profile** Edit | ? - X

Status: Active Birth date: 22 Apr 1964 Marital status: Married Gender: Female

**Address**  
Line 1: 1234 West Main Street  
City: Naperville State/Province: IL Country: US Zip/Postal code: 60565

**Contact Method**  
Home telephone: 555-333-5252 Work telephone: 555-214-4688  
Best time to be contacted: Between 9AM - 5PM

Continue

Step 7: Select the car/drive combination for the claim from the policy information



Jennifer Tibet, Customer Service Rep

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State  Zip

OR  Recent Searches

**Sametime** Edit | ? - X

People | Meetings | Options | Help

**I am Active**

- Claim Agents
  - Matthias Kramer
  - Scott Wayman

**Policy Information** Edit | ? - X

**Prior Activity**

Date	Method	Interaction Party	Category/Type	Task
01 Jan 2003	Telephone	Mary Frazets	Policy Change/Bill Date	Yes
23 Dec 2003	Email	Mary Frazets	Location Change/Address	Yes

Vehicles and drivers listed under this policy

Vehicle	Driver
2000 HONDA CIVIC SE	Mary Frazets
2003 PONTIAC VIBE	Tom Frazets
	Mary Frazets

Step 8: Review the vehicle policy details and continue.



Jennifer Tibet, Customer Service Rep

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State  Zip

OR

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Matthias Kramer
  - Scott Wayman
  - Maya Valentine

**Policy Information** Edit | ? - X

**Prior Activity**

Date	Method	Interaction Party	Category/Type	Task
01 Jan 2003	Telephone	Mary Frazets	Policy Change/Bill Date	Yes
23 Dec 2003	Email	Mary Frazets	Location Change/Address	Yes

Vehicles and drivers listed under this policy

Vehicle	Driver
2000 HONDA CIVIC SE	Mary Frazets
2003 PONTIAC VIBE	Tom Frazets
	Mary Frazets

**Vehicle Details**  
 VIN:4P4DFH41CHDA102114  
 Policy inception date:4/20/2006  
 Expiration date:4/20/2007

**Coverage Details**  
 Bodily injury liability per occurrence:\$300,000.00  
 Property damage liability per occurrence:\$100,000.00  
 Medical payments per person:\$10,000.00  
 Uninsured motorist bodily injury liability per accident:\$300,000.00  
 Uninsured motorist property damage per accident:\$10,000.00  
 Collision deductible:\$500.00  
 Comprehensive deductible:\$100.00  
 Daily rental coverage/limit (days):\$25.00/Day 30 Days

Step 9: Fill out the accident details and continue.

Jennifer Tibet, Customer Service Rep

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites ▾

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State  Zip

OR Recent Searches ▾

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

- I am Active
  - Claim Agents
    - Matthias Kramer
    - Scott Wayman
    - Maya Valentine

**Loss Details** Edit | ? - X

**Accident Details**

Street address of accident:

City:

State:

Zip code:

Loss description: Accident, Single vehicle ▾

Accident description:

Additional Passangers: Yes  No

Front passenger  Rear Left  Rear Right

Police contacted: Yes  No

Jurisdiction:

Where is vehicle now: Loss Location ▾

Continue

Step 10: Start to take details on the damage, the insured needs a repair facility, so use the auto fill to get map info based on the accident location.

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Jennifer Tibet, Customer Service Rep

Home | My Workspace | My Tasks | My Reports | My Dashboard | Help | My Favorites

### Calendar

Open Calendar

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

### Map Info

Address or Intersection

City

State

 Zip

OR Recent Searches

Get Map | **Auto Fill**

### Sametime

People Meetings Options Help

I am Active

- Claim Agents
  - Matthias Kramer
  - Scott Wayman
  - Maya Valentine
- Client Contacts
  - Seymour Business
  - Colin Freeman

### Loss Details

Vehicle Details

Vehicle repairs required: Yes  No

Rental car required: Yes  No


Does the vehicle need towing: Yes  No

Has a tow truck been called: Yes  No

---

Vehicle Details


<input type="checkbox"/> Left Front	<input type="checkbox"/> Middle Front	<input type="checkbox"/> Right Front	Vehicle Damage Description: <input type="text"/>
<input type="checkbox"/> minor	<input type="checkbox"/> minor	<input type="checkbox"/> minor	
<input type="checkbox"/> medium	<input type="checkbox"/> medium	<input type="checkbox"/> medium	
<input type="checkbox"/> severe	<input type="checkbox"/> severe	<input type="checkbox"/> severe	



<input type="checkbox"/> Left Middle		<input type="checkbox"/> Right Middle
<input type="checkbox"/> minor		<input type="checkbox"/> minor
<input type="checkbox"/> medium		<input type="checkbox"/> medium
<input type="checkbox"/> severe		<input type="checkbox"/> severe

<input type="checkbox"/> Left Rear	<input type="checkbox"/> Middle Rear	<input type="checkbox"/> Right Rear
<input type="checkbox"/> minor	<input type="checkbox"/> minor	<input type="checkbox"/> minor
<input type="checkbox"/> medium	<input type="checkbox"/> medium	<input type="checkbox"/> medium
<input type="checkbox"/> severe	<input type="checkbox"/> severe	<input type="checkbox"/> severe

Step 11: Launch the map tool



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**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection  
34 Elmsdale Lane

City  
Naperville

State  
IL

Zip  
60566

OR [Recent Searches](#)

**Get Map** [Auto Fill](#)

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Matthias Kramer
    - Scott Wayman
    - Maya Valentine
- Client Contacts
  - Seymour Business
    - Colin Freeman

**Loss Details** Edit | ? - X

**Vehicle Details**

Vehicle repairs required: Yes  No

Rental car required: Yes  No  [Notify](#)


Does the vehicle need towing: Yes  No

Has a tow truck been called: Yes  No

---

**Vehicle Details**

<input type="checkbox"/> Left Front	<input type="checkbox"/> Middle Front	<input type="checkbox"/> Right Front	Vehicle Damage Description: <input type="text"/>
<input type="checkbox"/> minor	<input type="checkbox"/> minor	<input type="checkbox"/> minor	
<input type="checkbox"/> medium	<input type="checkbox"/> medium	<input type="checkbox"/> medium	
<input type="checkbox"/> severe	<input type="checkbox"/> severe	<input type="checkbox"/> severe	

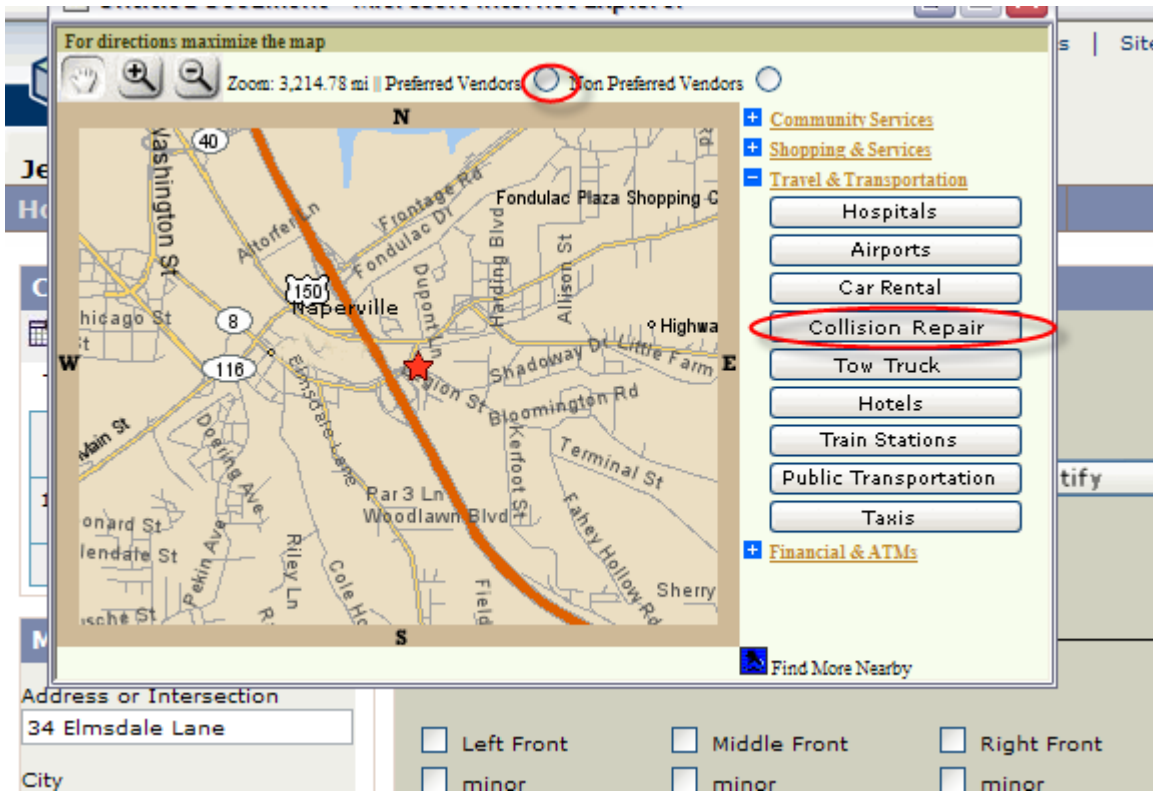


<input type="checkbox"/> Left Middle	<input type="checkbox"/> Right Middle
<input type="checkbox"/> minor	<input type="checkbox"/> minor
<input type="checkbox"/> medium	<input type="checkbox"/> medium
<input type="checkbox"/> severe	<input type="checkbox"/> severe

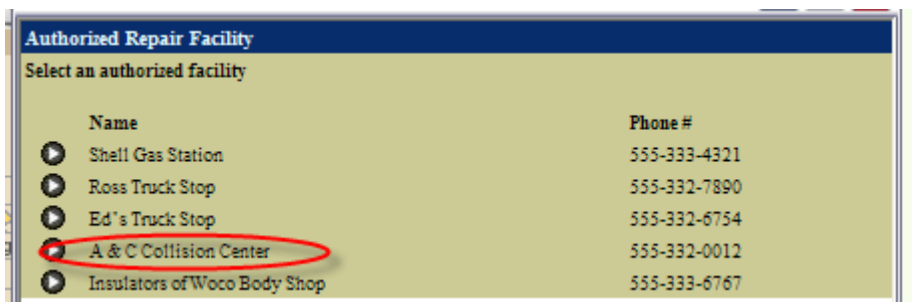
<input type="checkbox"/> Left Rear	<input type="checkbox"/> Middle Rear	<input type="checkbox"/> Right Rear
<input type="checkbox"/> minor	<input type="checkbox"/> minor	<input type="checkbox"/> minor
<input type="checkbox"/> medium	<input type="checkbox"/> medium	<input type="checkbox"/> medium
<input type="checkbox"/> severe	<input type="checkbox"/> severe	<input type="checkbox"/> severe

[Continue](#)

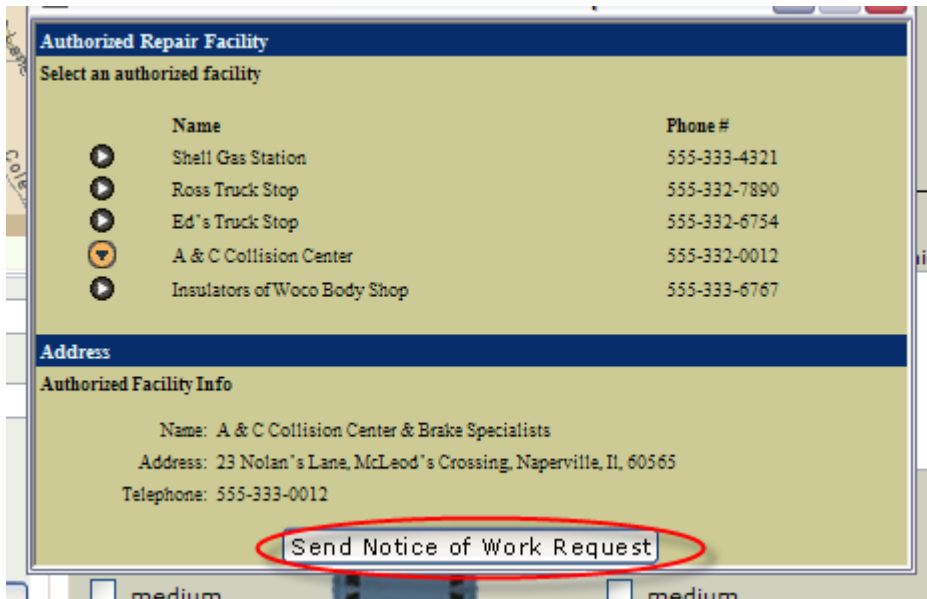
Step 12: Select preferred vendors and select the collision repair option



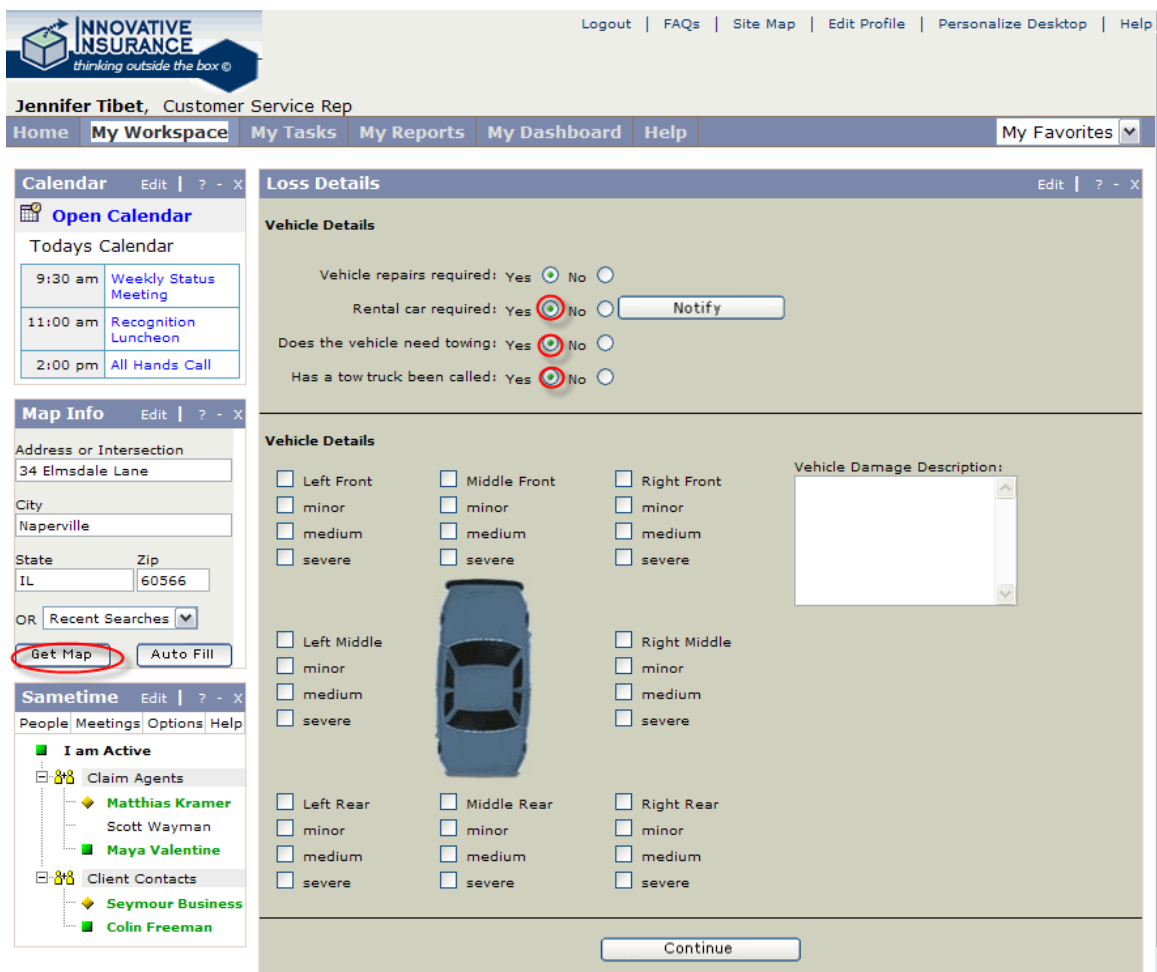
Step 13: Select information on A&C Collision Center, the Insured's choice of the nearby facilities.



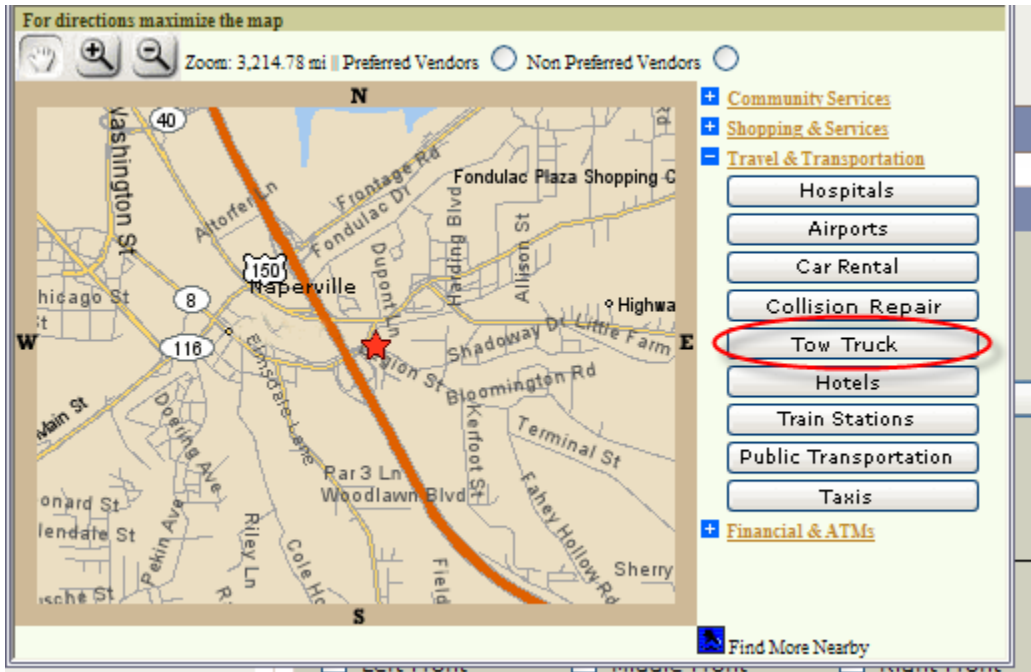
Step 14: Send a notice of work request, then close the map.



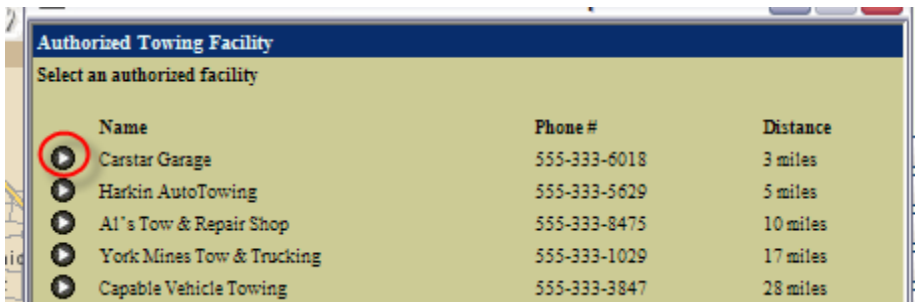
Step 15: Continue filling out the loss details, and then launch the map again to find a tow service.



Step 16: Select Tow trucks from the map feature.



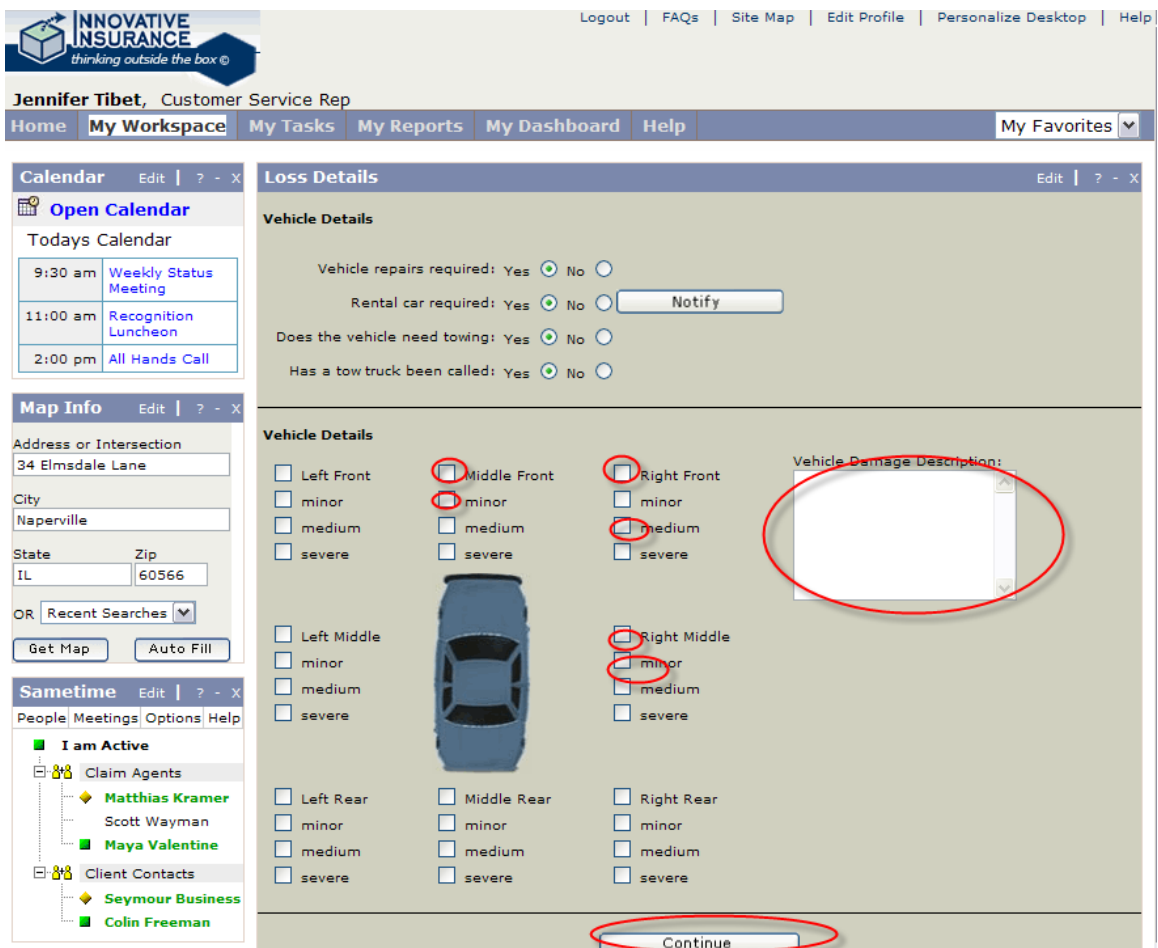
Step 17: Get details on Carstar Garage



Step 18: Then dispatch the tow truck to the scene and then close the map features.



Step 19: Complete the vehicle details of the claim and continue.





Step 20: Complete the 3<sup>rd</sup> party loss section, assign a property appraiser and continue the claim.

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Jennifer Tibet, Customer Service Rep

Home | My Workspace | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X  
Open Calendar  
Today's Calendar  
9:30 am Weekly Status Meeting  
11:00 am Recognition Luncheon  
2:00 pm All Hands Call

**Map Info** Edit | ? - X  
Address or Intersection  
34 Elmsdale Lane  
City  
Naperville  
State Zip  
IL 60566  
OR Recent Searches  
Get Map Auto Fill

**Sametime** Edit | ? - X  
People Meetings Options Help  
I am Active  
Claim Agents  
Matthias Kramer  
Scott Wayman  
Maya Valentine  
Client Contacts  
Seymour Business  
Colin Freeman

**Loss Details** Edit | ? - X  
Third Party Damage Details  
Other Damage: Yes  No   
Damage Category: Accident: Hit Parked Car  
Name of Property Owner:  
Location of Property:  
Was Other Party Notified: Yes  No   
Third Party Damage Description:  
Assign Property Appraiser  
Continue

Step 21: Review the claim summary and submit.


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

**Jennifer Tibet**, Customer Service Rep

[Home](#) | [My Workspace](#) | [My Tasks](#) | [My Reports](#) | [My Dashboard](#) | [Help](#) | [My Favorites](#)

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection  
34 Elmsdale Lane

City  
Naperville

State Zip  
IL 60566

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

I am Active

- Claim Agents
  - Matthias Kramer
    - Scott Wayman
    - Maya Valentine
- Client Contacts
  - Seymour Business
    - Colin Freeman

**Loss Summary** Edit | ? - X

**Insurer Information**

Policy 321456798  
Name Mary Frazets  
Address 1234 West Main Street, Naperville, Illinois 60565  
Phone number 555-333-5252  
Claim number 1234

**Policy Information**

Type of claim Automobile  
Date of loss 11/13/2006  
Coverage Bodily Injury per occurrence/\$300,000.00 Property damage liability per occurrence/\$100,000.00 Medical payments per person/\$10,000.00 Uninsured motorist bodily injury liability per accident/\$10,000.00 Collision deductible/\$500.00 Comprehensive deductible/\$100.00 Deductible \$250.00  
Car rental \$25.00/Day 30 Days

**Vehicle Information**

Make / Model Honda / Civic  
Year 2000  
Body Type Sedan SE  
VIN Number 4P4DFH41CHDA102114

**Accident Information**

Driver Name Mary Frazets  
Address of Accident 34 Elmsdale Lane, Naperville, Illinois 60566  
Accident Description Vehicle left road, continued through fence before coming to stop.  
Authorities contacted Naperville Illinois Police Department  
Services Requested Towing: Carstar Garage, 153 Tenth Street Naperville. Hertz Car Rental  
Repair Shop C&C Collision Ctr LLC TRLR, 733 S McLennan Dr, Elm Mott Naperville.  
Third Party Damage Fence located at 34 Elmsdale Lane. Julie Smith assigned.

**Next Steps**

An Insurance Handler will contact Insured within two hours. Telephone Mary Frazets at 555-333-5252

Step 22: We've finished with this role so logout of Jennifer's portal

**INNOVATIVE INSURANCE** *thinking outside the box* [Logout](#) [FAQs](#) [Site Map](#) [Edit Profile](#) [Personalize Desktop](#) [Help](#)

**Jennifer Tibet**, Customer Service Rep

[Home](#) [My Workspace](#) [My Tasks](#) [My Reports](#) [My Dashboard](#) [Help](#) [My Favorites](#)

### Calendar

[Open Calendar](#)

**Today's Calendar**

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

### Map Info

Address or Intersection  
34 Elmsdale Lane

City  
Naperville

State  
IL

Zip  
60566

OR [Recent Searches](#)

[Get Map](#) [Auto Fill](#)

### Sametime

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**I am Active**

- Claim Agents
  - Matthias Kramer
    - Scott Wayman
    - Maya Valentine
- Client Contacts
  - Seymour Business
    - Colin Freeman

### Call List

Name	Policy Number	Request Type	Time in Queue	Take Call
Rajiv Sanooth	264512839	Policy Update	3min	<a href="#">Take Call</a>
Kim Storm	827645321	Property Damage Claim	1min	<a href="#">Take Call</a>

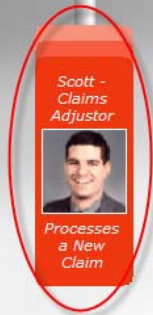
Role 2: Scott Wayman, Claims Agent

Step 1: Select Scott Wayman's cartouche to enter the claims agent role.

# Insurance Claims Handling



## Innovative Insurance



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Step 2: Log into Scott's portal

The screenshot shows the top navigation bar of the Innovative Insurance portal. The logo "INNOVATIVE INSURANCE" with the tagline "thinking outside the box" is on the left. On the right, there are links for "Logout", "FAQs", "Site Map", "Edit Profile", "Personalize Desktop", and "Help". Below the navigation bar is a menu with "Home", "My Workspace", "My Tasks", "My Reports", "My Dashboard", "Help", and "My Favorites". The main content area displays a "Login" dialog box with the following elements:

- A "User ID:" label followed by a text input field, circled in red.
- A "Password:" label followed by a text input field, circled in red.
- A link "Not registered? [Sign up](#)".
- Two buttons: "Log in" (circled in red) and "Cancel".

Step 3: Go to Scott's workplace

INNOVATIVE INSURANCE  
thinking outside the box

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Scott Wayman, Scott - Claims Adjustor

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Sametime** Edit | ? - X  
People Meetings Options Help

**I am Active**

- Claim Agents
  - Matthias Kramer  
Scott Wayman
  - Maya Valentine
- Client Contacts
  - Seymour Business
  - Colin Freeman

**Calendar** Edit | ? - X  
**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Top Stories** Edit | ? - X

- Innovative Insurance Responds to Hurricane Katrina
- The Innovative Insurance Foundation Establishes \$1 Million Hurricane Recovery Fund
- Social Responsibility Report
- Going beyond what's expected
- Quick service key to customer loyalty
- An attitude that makes the difference
- Fraud Investigator puts customer first
- Community Newsletter
- Innovative Insurance Matching-Donation Program Raised More than \$1.5 Million for Tsunami Disaster Recovery

**Alerts** Edit | ? - X

New Alerts: 2

- Attention:** Cross-Sell Exceeds Threshold!
- Attention:** Complete your 2007 Benefits Plan Enrollment

**Email** Edit | ? - X

New Messages\*

Inbox:	25 Messages (5 new)
Draft:	3 saved
Sent:	32 messages
Trash:	21 total

Step 4: Open his new claims

INNOVATIVE INSURANCE  
thinking outside the box

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Scott Wayman, Scott - Claims Adjustor

Home | My Workspace | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X  
Open Calendar  
Todays Calendar  
9:30 am Weekly Status Meeting  
11:00 am Recognition Luncheon  
2:00 pm All Hands Call

**Work Activity** Edit | ? - X  
Claims  
32 New Claims  
97 Open Claims

**My Team** Edit | ? - X  
Auto Appraiser  
Stephen Neil  
Telephone: 333-867-5410  
Accounts Manager  
Janet McLean  
Telephone: 333-832-0097  
Claims Adjuster  
Paul Hernandez  
Telephone: 356-232-4321

**Map Info** Edit | ? - X  
Address or Intersection  
City  
State Zip  
OR Recent Searches  
Get Map Auto Fill


**Team Directory** Edit | ? - X  
Search  
Go  
Advanced Search

**Lookup** Edit | ? - X  
By Policy Number  
Go  
Advanced Search

**Sametime** Edit | ? - X  
People Meetings Options Help  
I am Active  
Claim Agents  
Evan Keel  
Ben Good  
Billing  
Agency CSRs

**Information** Edit | ? - X  
Insurance Manuals  
National Automotive Policy Handbook  
Claims Risk Analysis  
Banking Green Pages  
Weather

Step 5: Select Worksheet from the dropdown and open up the first claim in his queue.


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

**Scott Wayman, Scott - Claims Adjustor**

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Work Activity** Edit | ? - X

Claims

32 New Claims  
97 Open Claims

**New Claims** Edit | ? - X

New Claims

Claim Number	Insurer Name	Date of Loss
1234	Mary Frazets	11/13/2006
SIC9023	Della Horne	11/13/2006
AUT8901	Billie R. Kelly	11/13/2006
AUT7463	Rajiv Sanooth	11/13/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410  
Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097  
Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

[Advanced Search](#)

**Information** Edit | ? - X

[Insurance Manuals](#)  
[National Automotive Policy Handbook](#)  
[Claims Risk Analysis](#)  
[Banking Green Pages](#)

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR


**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing

Step 6: Open up the loss snapshot for this claim.


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop

**Scott Wayman, Claims Agent**

[Home](#) | [My Workspace](#) | [My Tasks](#) | [My Reports](#) | [My Dashboard](#) | [Help](#) [My Favor](#)

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

**New Claims** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
1234 Loss Snapshot	Mary Frazets West Main Street, Naperville	11/13/2006		
1234 FNOL Record	Mary Frazets West Main Street, Naperville	11/13/2006		

**My Team** Edit

Auto Appraiser

[Stephen Neil](#)

Telephone: 333-867-5410

Accounts Manager

[Janet McLean](#)

Telephone: 333-832-0097

Claims Adjuster

[Paul Hernandez](#)

Telephone: 356-232-4321

**Team Directory** Edit

Search

[Advanced Search](#)

**Lookup** Edit

By Policy Number

[Advanced Search](#)

**Information** Edit

[Insurance Manuals](#)

[National Automotive Po Handbook](#)

[Claims Risk Analysis](#)

[Banking Green Pages](#)

[Weather](#)

Step 7: Close the loss Snapshot, then open up the FNOL Record



INSURANCE  
thinki

1234

**Policy Holder Information**

Policy	321456798
Name	Mary Frazets
Address	1234 West Main Street, Naperville, Illinois 60565
Phone number	555-333-5252
Claim number	1234

**Policy Information**

Type of claim	Automobile
Date of loss	11/13/2006
Coverage	Bodily Injury per occurrence/\$300,000.00 Property damage liability per occurrence/\$100,000.00 Medical payments per person/\$10,000.00 Uninsured motorist bodily injury liability per accident/\$10,000.00 Collision deductible/\$500.00 Comprehensive deductible/ \$100.00 Deductible \$250.00
Car rental	\$25.00/Day 30 Days

**Vehicle Information**

Make	Honda
Model	Civic
Year	2000
Body Type	Sedan SE
VIN Number	4P4DFH41CHDA102114


**Accident Information**

Address of Accident	34 Elmsdale Lane, Naperville, Illinois 60566
Accident Description	Vehicle left road, continued through fence before coming to stop.
Authorities contacted	Naperville Illinois Police Department
Services Requested	Towing: Carstar Garage, 153 10th Street Naperville. Hertz Car Rental
Repair Shop	A&C Collision Center & Brake Specialists 23 Nolan's Lane, McLeod's Crossing, Naperville
Third Party Damage	Fence located at 34 Elmsdale Lane. Adjustor assigned.

**Next Steps**

Insurance Handler	Contact Mary Frazets at 555-333-5252 within two hours
Initial Reserve	\$2500.00

Microsoft Internet Explorer



[Logout](#) | [FAQs](#) | [Site Map](#) | [Edit Profile](#) | [Personalize Desktop](#)

**Scott Wayman**, Claims Agent

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**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	<a href="#">Weekly Status Meeting</a>
11:00 am	<a href="#">Recognition Luncheon</a>
2:00 pm	<a href="#">All Hands Call</a>

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR [Recent Searches](#)

[Get Map](#) [Auto Fill](#)

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel**
  - Ben Good**
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet



Policy Number 321456798 Claim Number 1234  
 Insurer Innovative Insurance Policy Holder Mary Frazets  
 Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)  
[Conduct followup with Vehicle Repair](#)  
[Tow Truck services](#)  
[Rental car agreement](#)  
[Add other...](#)

**Claim Actions and Status**

**New Claims** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
	1234 Loss Snapshot	Mary Frazets West Main Street, Naperville	11/13/2006	
	234 FNOL Record	Mary Frazets West Main Street, Naperville	11/13/2006	

**My Team** Edit

Auto Appraiser  
[Stephen Neil](#)  
 Telephone: 333-867-5410  
 Accounts Manager  
[Janet McLean](#)  
 Telephone: 333-832-0097  
 Claims Adjuster  
[Paul Hernandez](#)  
 Telephone: 356-232-4321

**Team Directory** Edit

Search

[Advanced Search](#)

**Lookup** Edit

By Policy Number

[Advanced Search](#)

**Information** Edit

[Insurance Manuals](#)  
[National Automotive Pc Handbook](#)  
[Claims Risk Analysis](#)  
[Banking Green Pages](#)  
[Weather](#)

Step 8: Close the FNOL Record


1234

### Loss Notice

DATE (MM/DD/YYYY)  
11/13/2006

PRODUCER	PHONE [A/C, NO, EXT]	MISCELLANEOUS INFO [SITE & LOCATION CODE]	LOSS DATE, TIME	PREVIOUSLY REPORTED?
Innovative Insurance Call Center	TL 5895	NVIL 167-45-59	11/13/2006, 11:08	No
		POLICY TYPE	COMPANY AND POLICY NAME	NAIC CODE
		PROP/HOME	CO: Innovative Insurance	IIHA
		FLOOD	POL: Home/Auto	EFF: 011504
		WIND	CO:	EXP: 011505
			POL:	EFF:
			CO:	EXP:
			POL:	EXP:
AGENCY CUSTOMER ID				
IIHA0121234				
<b>INSURED</b>		<b>CONTACT</b> <input checked="" type="checkbox"/> CONTACT INSURED		
INSURED NAME, ADDRESS		BIRTH DATE	INSURED NAME, ADDRESS	
Mary Frazets 1234 West Main Street Naperville, Illinois 60565		April 22, 1964	Mary Frazets 1234 West Main Street Naperville, Illinois 60565	
RESIDENCE PHONE [A/C, NO]		SOC SEC #/FEIN	RESIDENCE PHONE [A/C, NO]	
555-333-5252		136429-01	555-333-5252	
BUSINESS PHONE [A/C, NO, EXT.]			BUSINESS PHONE [A/C, NO, EXT.]	
555-214-4688			555-214-4688	
SPOUSE NAME, ADDRESS		BIRTH DATE	WHERE TO CONTACT	
Tom Frazets 1234 West Main Street Naperville, Illinois 60565		Jan 11, 1959	Quality Builder Inc.	
		SOC SEC #/FEIN	WHEN TO CONTACT	
		683412-01	8:30 - 18:00	
<b>LOSS</b>				
LOCATION OF LOSS			POLICE OR FIR DEPT TO WHICH REPORTED	
34 Elmsdale Lane, Naperville, Illinois			Naperville Illinois Ploice Department	
TYPE OF LOSS	FIRE	LIGHTNING	WIND	OTHER [EXPLAIN]
THEFT		FLOOD	HAIL	Vehide single vehicle accident
DESCRIPTION OF LOSS AND DAMAGE			PROBABLE AMOUNT ENTIRE LOSS	

Step 9: Click on 'add other...' to add some actions required.


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop

**Scott Wayman, Scott - Claims Adjustor**

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**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234  
Insurer Innovative Insurance Policy Holder Mary Frazets  
Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)  
[Conduct followup with Vehicle Repair](#)  
[Tow Truck services](#)  
[Rental car agreement](#)  
[Add other...](#)

**Claim Actions and Status**

**New Claims** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
1234 Loss Snapshot	Mary Frazets West Main Street, Naperville	11/13/2006		
1234 FNOL Record	Mary Frazets West Main Street, Naperville	11/13/2006		

**My Team** Edit

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit

Search

[Advanced Search](#)

**Lookup** Edit


By Policy Number

[Advanced Search](#)

**Information** Edit

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[Weather](#)

Step 10: Check on Accident Report and Vehicle Repair Invoice. Click 'add'



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---

**Scott Wayman, Scott** - Claims Adjustor

[Home](#) | [My Workspace](#) | [My Tasks](#) | [My Reports](#) | [My Dashboard](#) | [Help](#) | [My Favorites](#)

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Add Action** Edit | ? - X

Select Actions to Add to Worksheet

<input type="checkbox"/> Accident Report	<input type="checkbox"/> Property Appraisal	<input type="checkbox"/> Witness Report
<input type="checkbox"/> Property Damage Invoice	<input type="checkbox"/> Medical Injury Invoice	<input checked="" type="checkbox"/> Vehicle Repair Invoice
<input type="checkbox"/> Call: <input type="text"/>	<input type="checkbox"/> Contact Fraud Unit	
<input type="checkbox"/> Other: <input type="text"/>		

**My Team** Edit

Auto Appraiser

[Stephen Neil](#)  
Telephone: 333-867-5410

Accounts Manager

[Janet McLean](#)  
Telephone: 333-832-0097

Claims Adjuster

[Paul Hernandez](#)  
Telephone: 356-232-4321

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234  
 Insurer Innovative Insurance Policy Holder Mary Frazets  
 Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)  
[Conduct followup with Vehicle Repair](#)  
[Tow Truck services](#)  
[Rental car agreement](#)  
[Add other...](#)

**Claim Actions and Status**

**Team Directory** Edit

Search

[Advanced Search](#)

**Lookup** Edit

By Policy Number

**Information** Edit

[Insurance Manuals](#)  
[National Automotive F Handbook](#)  
[Claims Risk Analysis](#)  
[Banking Green Pages](#)  
[Weather](#)

**Sametime** Edit | ? - X

People Meetings Options Help


**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**New Claims** Edit | ? - X

Name	Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
1234 Loss Snapshot		Mary Frazets West Main Street, Naperville			11/13/2006
1234 FNOL Record		Mary Frazets West Main Street, Naperville			11/13/2006

Step 11: Logout



[Logout](#) | [FAQs](#) | [Site Map](#) | [Edit Profile](#) | [Personalize Desktop](#)

**Scott Wayman, Scott - Claims Adjustor**

[Home](#) | [My Workspace](#) | [My Tasks](#) | [My Reports](#) | [My Dashboard](#) | [Help](#) | [My Favorites](#)

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

I am Active

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

Accident Report

Vehicle Repair Invoice

**New Claims** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
1234 Loss Snapshot	Mary Frazets West Main Street, Naperville	11/13/2006		
1234 FNOL Record	Mary Frazets West Main Street, Naperville	11/13/2006		

**My Team** Edit

Auto Appraiser [Stephen Neil](#)

Telephone: 333-867-5410

Accounts Manager [Janet McLean](#)

Telephone: 333-832-0097

Claims Adjuster [Paul Hernandez](#)

Telephone: 356-232-4321

**Team Directory** Edit

Search

[Advanced Search](#)

**Lookup** Edit

By Policy Number

[Advanced Search](#)

**Information** Edit

[Insurance Manuals](#)

[National Automotive P Handbook](#)

[Claims Risk Analysis](#)

[Banking Green Pages](#)

[Weather](#)

Role 3: Kevin Newman, Claims Manager

Step 1: Select the claims manager cartouche

# Insurance Claims Handling



## Innovative Insurance



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### Step 2: Log in to Kevin's portal

The screenshot shows the Innovative Insurance portal interface. At the top left is the logo "INNOVATIVE INSURANCE" with the tagline "thinking outside the box ©". To the right are links for "Logout", "FAQs", "Site Map", "Edit Profile", "Personalize Desktop", and "Help". Below this is a navigation bar with "Home", "My Alerts", "My Tasks", "My Reports", "My Dashboard", "Help", and "My Favorites" (with a dropdown arrow). The main content area features a "Login" dialog box. The "User ID:" and "Password:" fields are circled in red. Below the fields, there is a link "Not registered? Sign up" and two buttons: "Log in" (circled in red) and "Cancel".

Step 3: Go to Kevin's dashboard

**INNOVATIVE INSURANCE**  
thinking outside the box

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Kevin Newman, Claims Manager

Home | My Alerts | My Tasks | My Reports | **My Dashboard** | Help | My Favorites

**Sametime** Edit | ? - X  
People Meetings Options Help

**I am Active**

- Claim Agents
  - Matthias Kramer
  - Scott Wayman
  - Maya Valentine
- Client Contacts
  - Seymour Business
  - Colin Freeman

**Calendar** Edit | ? - X  
**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Top Stories** Edit | ? - X

- Innovative Insurance Responds to Hurricane Katrina
- The Innovative Insurance Foundation Establishes \$1 Million Hurricane Recovery Fund
- Social Responsibility Report
- Going beyond what's expected
- Quick service key to customer loyalty
- An attitude that makes the difference
- Fraud Investigator puts customer first
- Community Newsletter
- Innovative Insurance Matching-Donation Program Raised More than \$1.5 Million for Tsunami Disaster Recovery

**Alerts** Edit | ? - X  
New Alerts: 2


- Attention:** Cross-Sell Exceeds Threshold!
- Attention:** Complete your 2007 Benefits Plan Enrollment

**Email** Edit | ? - X  
New Messages\*

Inbox:	25 Messages (5 new)
Draft:	3 saved
Sent:	32 messages
Trash:	41 total

Step 4: Review the dashboard and decide to look into why one area has gone into the red.





Logout | FAQs | Site Map | Edit Profile | Personalize D

**Kevin Newman**, Claims Manager

[Home](#) | [My Alerts](#) | [My Tasks](#) | [My Reports](#) | **[My Dashboard](#)** | [Help](#)
My F

---


**Kevin Newman** View Information

Dennis Michaels  
 Kevin Newman  
 Scott Wayman  
 Francis Meriwether  
 Elizabeth Nahm  
 Minh Li  
 Matthias Kramer  
 Stan Carrow  
 Raimundo Martin

Search by:

Search for:

[Advanced Search](#)

My Alerts ?

Sep 28, 2006  
[A linked item has been deleted for increase the number of claims handled by each adjuster.](#)

Sep 27, 2006  
[Your score card has been sent back to you by Dennis Michaels.](#)


### Scorecard for Kevin Newman

Scorecard st

Display r

Objective	Status	Milestone Target	Actual	Variance	Change	Fir
<b>Open Claims</b>						
▶ 0 - 30 Days	↑	90%	85%	-5%	-5%	90
▶ 31 - 45 Days	↓	90%				90
Over 46 Days	↑	100%	99%			10
<b>Open Reserves</b>						
Over \$10 K	↓	\$0.5 M	\$8.0 M	7.5%		\$0
▶ Over \$25 K	↑	\$0.5 M	\$8.0M	\$7.5M		\$0
<b>Claim Payments</b>						
Home Owners	→	100%	90%	10%	-10%	10
Auto	→	0	1	1	1	0
<b>Learning and Growth</b>						
Managed attrition rate of 6%	↕	600	595	5	-5	60
Mentoring of high potential candidates	↑	60	61	1	1	60
▶ World Class Employer	↕	100%	88%	-12%	0%	10

Step 5: Review that it's Scott Wayman, who is out on medical leave, that is causing the situation. Right click on his name in the org-tree and select the click-to-action 'tasks' to get his work queue.


Logout | FAQs | Site Map | Edit Profile | Personalize

**Kevin Newman, Claims Manager**

Home | My Alerts | My Tasks | My Reports | **My Dashboard** | Help

**Kevin Newman**  
 View Information

- Dennis Michaels
- Kevin Newman**
- Scott Wayman
- Francis Meriwether
- Elizabeth Nahm
- Minh Li
- Matthias Kramer
- Stan Carrow
- Raimundo Martin

Search by: Name  
 Search for:  Search  
[Advanced Search](#)

**My Alerts**

Sep 28, 2006  
 A linked item has been deleted for increase the number of claims handled by each adjuster.

Sep 27, 2006  
 Your score card has been sent back to you by Dennis Michaels.

### Heat Chart for Kevin Newman


Show: All linkages | Status type: All

<b>Kevin Newman</b> <b>Objective:</b> Open Claims Percentage	Milestone Target: 10% Actual: 6.8% Variance: 6.8% Change: 1.2% Final Target: 10%
--	--

**Initiatives**

- Francis Meriwether**  
 Open Claims Percentage  
 2 ↑ 1 ↓ 0 → 12%
- Scott Wayman**  
 Open Claims Percentage  
 15%
- Kevin Newman**  
 Open Claims Percentage  
 2 ↑ 2 ↓ 1 → 6.8%
- Raimundo Martin**  
 Open Claims Percentage  
 7.2%
- Jane Harold**  
 Open Claims Percentage  
 1 ↑ 3 ↓ 1 → -8.2%
- Stan Carrow**  
 Build customer sati...  
 7.4%

Step 6: Select the claims in his personal queue and escalated tasks and use the transfer option


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

**Kevin Newman, Claims Manager**

Home | My Alerts | My Tasks | My Reports | **My Dashboard** | Help | My Favorites

### Work at a Glance for Scott Wayman

Global Queue | Task Type: All | Total Items 250

Received From	Type	Received Date	Prty	Source	Action
Jones and Kline	Property Claim	August 20, 06, 10:03 am	2	Paper	
Miranda Leeky	Home Claim	August 20, 06, 10:04 am	3	Email	
Case Number: 2357 Escalated By: Ivan Watching Reason: Cancel/Save special handling					
Morose and Toomey	Auto Claim	August 19, 06, 11:45	4	Xfer from FC	

**Personal Queue** | Unclaim Tasks

Received From	Type	Received Date	Prty	Reason	Action
Mary Frazerts	Automotive Claim	November 13, 06, 11:04 am	1	Wait for Payment	
Mimi Docile	home Claim	August 18, 06, 11:58 am	2	Wait for Form	
Belinda Freund	Auto Claim	November 17, 06, 1:45 pm	1	Wait for Callback	

**Escalated Tasks** | Show: Time Sensitive | Total Items 20

Received From	Type	Received Date	Assigned To	Prty	Reason	Action
Atlanta	Auto Claim	August 20, 06, 10:10 am	I. Halpin	1	Pending Police Report	
Dunbridge and Denver	Property Claim	August 19, 06, 09:47 am	GAHOME	1	Pending Estimate	
Anderson and Baker	Property Claim	August 18, 06, 10:42 am	GAHOME	1	Pending Estimate	
Lally and Tines	Auto Claim	August 18, 06, 2:48 pm	GAAUTO	1	Pending Invoice	

Step 7: Select Matthias Kramer and transfer the tasks to him

Transfer Tasks

Transfer to Group : Select

Transfer to User : Select

Reason for Transfer :

Transfer Cancel

Work at a Glance for Scott Wayman

Global Queue Task Type: All Advanced Total Items 250

Received From	Type	Received Date	Prty	Source	Action
Jones and Kline	Property Claim	August 20, 06, 10:03 am	2	Paper	[Action Icons]
Miranda Leeky	Home Claim	August 20, 06, 10:04 am	3	Email	[Action Icons]

Step 8: Log out of the managers portal

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Kevin Newman, Claims Manager

Home | My Alerts | My Tasks | My Reports | My Dashboard | Help | My Favorites

Work at a Glance for Scott Wayman

Global Queue Task Type: All Advanced Total Items 250

Received From	Type	Received Date	Prty	Source	Action
Jones and Kline	Property Claim	August 20, 06, 10:03 am	2	Paper	[Action Icons]
Miranda Leeky	Home Claim	August 20, 06, 10:04 am	3	Email	[Action Icons]
Case Number: 2357 Escalated By: Ivan Watching Reason: Cancel/Save special handling					
Morose and Toomey	Automotive Claim	August 19, 06, 11:45	4	Xfer from FC	[Action Icons]

Personal Queue Claim Tasks Unclaim Tasks

Received From	Type	Received Date	Category	Prty	Reason	Action
---------------	------	---------------	----------	------	--------	--------

Escalated Tasks Show Time Sensitive Advanced Total Items 20

Received From	Type	Received Date	Category	Assigned To	Prty	Reason	Action
---------------	------	---------------	----------	-------------	------	--------	--------

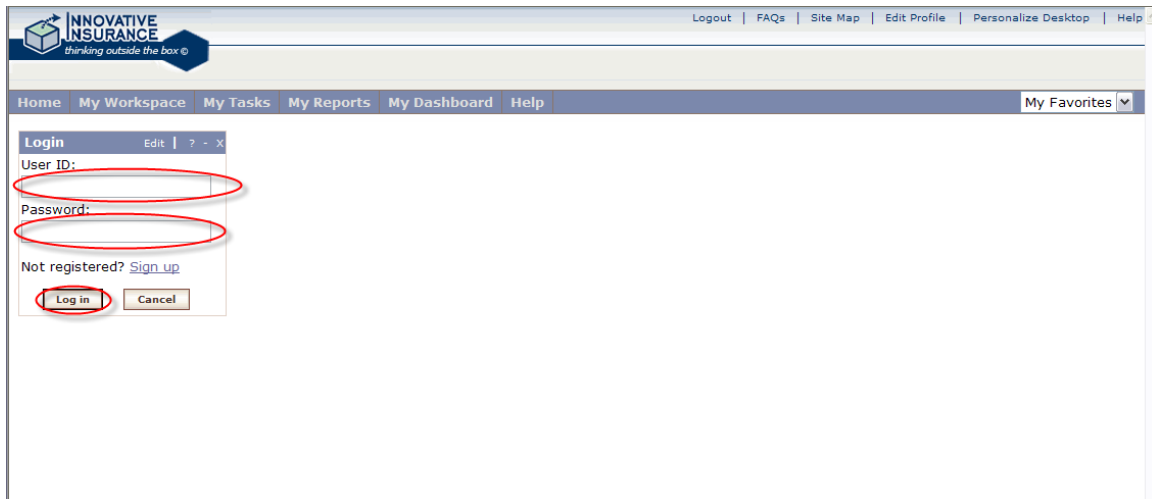
Role 4: Matthias Kramer, Claims Agent

Step 1: Select Matthias' cartouche

# Insurance Claims Handling



Step 2: Log into Matthias' portal



Step 3: Go to his workspace

**INNOVATIVE INSURANCE**  
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Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Matthias Kramer, Matthias - Claims Adjustor

Home **My Workspace** My Tasks My Reports My Dashboard Help My Favorites

**Sametime** Edit | ? - X  
People Meetings Options Help  
I am Active  
Claim Agents  
Matthias Kramer  
Scott Wayman  
Maya Valentine  
Client Contacts  
Seymour Business  
Colin Freeman

**Top Stories** Edit | ? - X  
Innovative Insurance Reponds to Hurricane Katrina  
The Innovative Insurance Foundation Establishes \$1 Million Hurricane Recovery Fund  
Social Responsibility Report  
Going beyond what's expected  
Quick service key to customer loyalty  
An attitude that makes the difference  
Fraud Investigator puts customer first  
Community Newsletter  
Innovative Insurance Matching-Donation Program Raised More than \$1.5 Million for Tsunami Disaster Recovery

**Alerts** Edit | ? - X  
New Alerts: 2  
Attention: Cross-Sell Exceeds Threshold!  
Attention: Complete your 2007 Benefits Plan Enrollment

**Email** Edit | ? - X  
New Messages\*  
Inbox: 25 Messages (5 new)  
Draft: 3 saved  
Sent: 32 messages  
Trash: 24 total

**Calendar** Edit | ? - X  
Open Calendar  
Todays Calendar  
9:30 am Weekly Status Meeting  
11:00 am Recognition Luncheon  
2:00 pm All Hands Call

Step 4: Open his 'open claims'

**INNOVATIVE INSURANCE**  
thinking outside the box

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

Matthias Kramer, Matthias - Claims Adjustor

Home My Workspace My Tasks My Reports My Dashboard Help My Favorites

**Calendar** Edit | ? - X  
Open Calendar  
Todays Calendar  
9:30 am Weekly Status Meeting  
11:00 am Recognition Luncheon  
2:00 pm All Hands Call

**Map Info** Edit | ? - X  
Address or Intersection  
City  
State Zip  
OR Recent Searches  
Get Map Auto Fill

**Sametime** Edit | ? - X  
People Meetings Options Help  
I am Active  
Claim Agents  
Evan Keel  
Ben Good  
Billing  
Agency CSRs

**Work Activity** Edit | ? - X  
Claims  
27 New Claims  
11 Open Claims


**My Team** Edit | ? - X  
Auto Appraiser  
Stephen Neil  
Telephone: 333-867-5410  
Accounts Manager  
Janet McLean  
Telephone: 333-832-0097  
Claims Adjuster  
Paul Hernandez  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X  
Search  
Go  
Advanced Search

**Lookup** Edit | ? - X  
By Policy Number  
Go  
Advanced Search

**Information** Edit | ? - X  
Insurance Manuals  
National Automotive Policy Handbook  
Claims Risk Analysis  
Banking Green Pages  
Weather

Step 5: Select the recently updated claim


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

**Matthias Kramer, Matthias - Claims Adjustor**

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

- 9:30 am Weekly Status Meeting
- 11:00 am Recognition Luncheon
- 2:00 pm All Hands Call

**Work Activity** Edit | ? - X

New Claims

27 New Claims

110 Open Claims

**Open Claims** Edit | ? - X

1-6 of 110

Claim Number	Insurer Name	Status	Date of Loss
SIC5693	Kate Smith		11/13/2006
SIC9023	Della Horne		11/13/2006
AUT8901	Billie R. Kelly		11/13/2006
AUT7463	RAjiv Sanooth		11/13/2006
1234	Mary Frazets	Updated	11/13/2006
REC8943	Ester Rollius		11/14/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410  
Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097  
Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

[Advanced Search](#)

**Information** Edit | ? - X

- [Insurance Manuals](#)
- [National Automotive Policy Handbook](#)
- [Claims Risk Analysis](#)
- [Banking Green Pages](#)
- [Weather](#)

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches


**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

### Step 6: Review the accident report


Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

**Matthias Kramer, Matthias - Claims Agent**

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

- 9:30 am Weekly Status Meeting
- 11:00 am Recognition Luncheon
- 2:00 pm All Hands Call

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

Accident Report

Vehicle Repair Invoice

**Virtual Claims File** Edit | ? - X

Name	Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
1234 Loss Snapshot		Mary Frazets West Main Street, Naperville			11/13/2006
1234 FNOL Record		Mary Frazets West Main Street, Naperville			11/13/2006
Accident Report		Naperville Illinois Police Department			11/14/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410  
Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097  
Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

[Advanced Search](#)

**Information** Edit | ? - X

- [Insurance Manuals](#)
- [National Automotive Policy Handbook](#)
- [Claims Risk Analysis](#)
- [Banking Green Pages](#)
- [Weather](#)

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

**Sametime** Edit | ? - X


People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

Step 7: Close the accident report, check it off, and then go to the property damage tab of the virtual claim file.

The screenshot shows a Microsoft Internet Explorer window titled "eDocument Viewer - Microsoft Internet Explorer". The browser's address bar contains "1234". The main content area displays an "Accident Report" form. At the top, the title "Accident Report" is centered. Below the title, the form contains two fields: "Witness Name: Robin Waggoner" and "Accident Date: 11/13/2006". The main body of the report contains a handwritten note: "Car 1 was driving past intersection, lost control and drove into wooden fence before coming to a stop." Below the text is a hand-drawn diagram of a T-junction. A horizontal road on the left meets a vertical road on the right. A car is shown on the horizontal road, having crossed the vertical road and is now positioned against a wooden fence. A large arrow points from the car towards the intersection. A stop sign is drawn at the top of the vertical road, and another stop sign is drawn at the bottom of the vertical road. To the right of the document viewer, a sidebar contains a "My Team" section with a list of names and contact information: "Auto Ap", "Stephe", "Telepho", "Account", "Janet I", "Telepho", "Claims /", "Paul He", "Telepho". Below this is a "Team" section with a "Search" field and a "By Poli" dropdown menu. Further down are sections for "Looku" and "Infor" with various links like "Insura", "Nation", "Handb", "Claims", "Bankin", and "Weath".



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**Matthias Kramer**, Claims Agent

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**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

I am Active

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

Accident Report

Vehicle Repair Invoice

**Virtual Claims File** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
1234 Loss Snapshot	Mary Frazets West Main Street, Naperville	11/13/2006		
1234 FNOL Record	Mary Frazets West Main Street, Naperville	11/13/2006		
Accident Report	Naperville Illinois Police Department	11/14/2006		

**My Team** Edit | ? - X

Auto Appraiser

[Stephen Neil](#)

Telephone: 333-867-5410

Accounts Manager

[Janet McLean](#)

Telephone: 333-832-0097

Claims Adjuster

[Paul Hernandez](#)

Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

Go

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

Go

[Advanced Search](#)

**Information** Edit | ? - X

[Insurance Manuals](#)

[National Automotive Policy Handbook](#)


[Claims Risk Analysis](#)

[Banking Green Pages](#)

[Weather](#)

Step 8: Review the repair invoice and the damage photo, closing the viewers after each.




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**Matthias Kramer**, Claims Agent

[Home](#) | [My Workspace](#) | [My Tasks](#) | [My Reports](#) | [My Dashboard](#) | [Help](#)
My Favorites

---

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	<a href="#">Weekly Status Meeting</a>
11:00 am	<a href="#">Recognition Luncheon</a>
2:00 pm	<a href="#">All Hands Call</a>

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR [Recent Searches](#)

[Get Map](#) [Auto Fill](#)

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - [Evan Keel](#)
  - [Ben Good](#)
- [Billing](#)
- [Agency CSRs](#)

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

Accident Report Higher Authorization Required

Vehicle Repair Invoice

**Virtual Claims File** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
<a href="#">A &amp; C Collision Center: Vehicle Repair Invoice</a>				12/18/2006
<a href="#">Accident Photo: Vehicle damage, front and side view</a>				12/11/2006
<a href="#">Adjuster Report: Third party property damage</a>				12/11/2006
<a href="#">Automated Vehicle Repair Estimate</a>				12/13/2006
<a href="#">Vehicle Titles: Search results</a>				12/11/2006

**My Team** Edit | ? - X

Auto Appraiser

[Stephen Neil](#)

Telephone: 333-867-5410

Accounts Manager

[Janet McLean](#)

Telephone: 333-832-0097

Claims Adjuster

[Paul Hernandez](#)

Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Go](#)

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

[Go](#)

[Advanced Search](#)

**Information** Edit | ? - X

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Step 9: Check off on the Invoice, and go to get authorization for the out of range claim

**Matthias Kramer**, Claims Agent

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	<a href="#">Weekly Status Meeting</a>
11:00 am	<a href="#">Recognition Luncheon</a>
2:00 pm	<a href="#">All Hands Call</a>

**Map Info** Edit | ? - X

Address or Intersection

City

State

Zip

OR  Recent Searches

[Get Map](#) [Auto Fill](#)

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - [Evan Keel](#)
  - [Ben Good](#)
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234  
 Insurer Innovative Insurance Policy Holder Mary Fazrets  
 Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)  
[Conduct followup with Vehicle Repair](#)  
[Tow Truck services](#)  
[Rental car agreement](#)  
[Add other...](#)

**Claim Actions and Status**

Accident Report Higher Authorization Required

Vehicle Repair Invoice

**Virtual Claims File** Edit | ? - X

Name  Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
A & C Collision Center: Vehicle Repair Invoice				12/18/2006
Accident Photo: Vehicle damage, front and side view				12/11/2006
Adjuster Report: Third party property damage				12/11/2006
Automated Vehicle Repair Estimate				12/13/2006
Vehicle Titles: Search results				12/11/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
 Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
 Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
 Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

[Advanced Search](#)

**Information** Edit | ? - X

[Insurance Manuals](#)

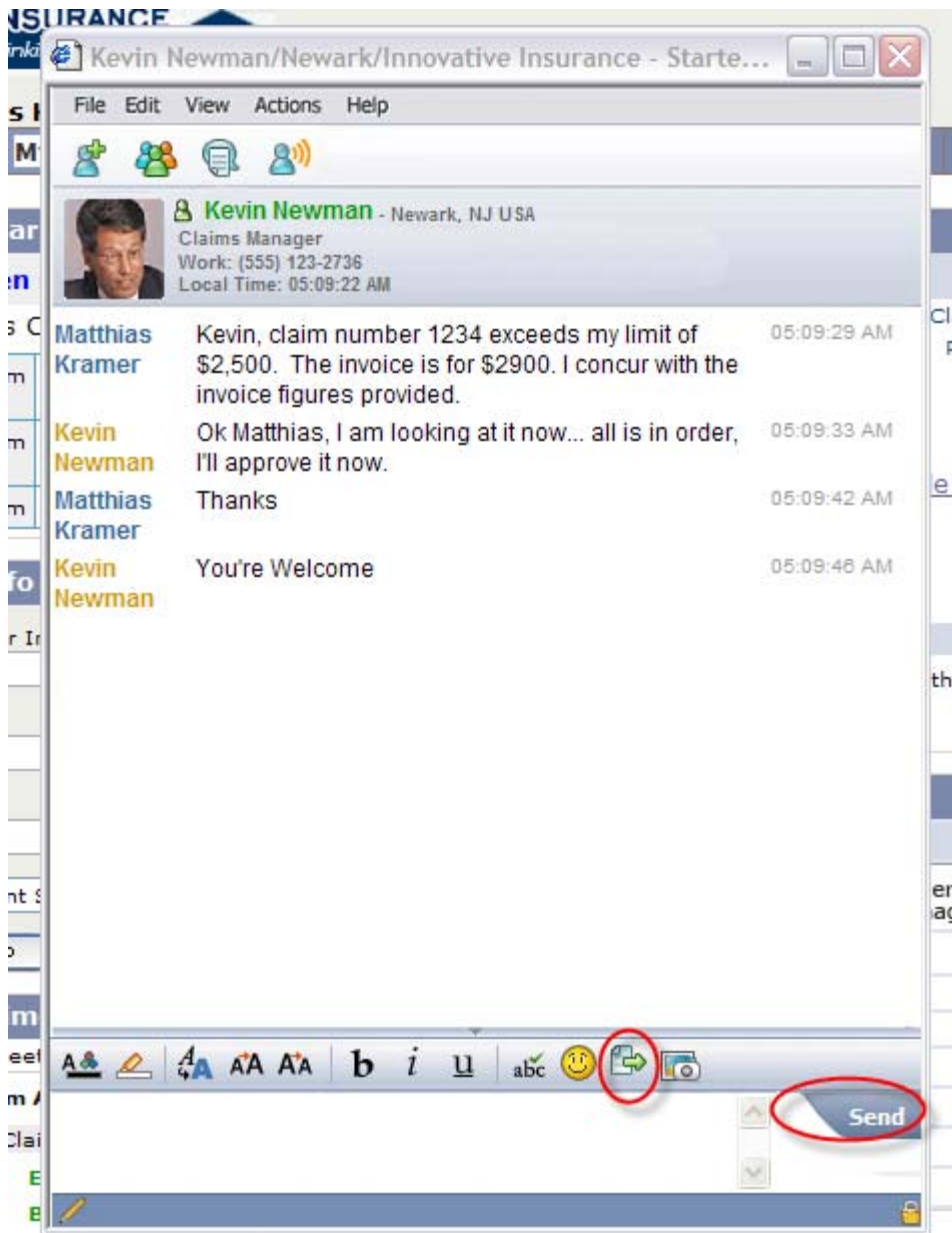
[National Automotive Policy Handbook](#)

[Claims Risk Analysis](#)


[Banking Green Pages](#)

[Weather](#)

Step 10: Hold the conversation with Kevin, and save it.



Step 11: Go to the correspondence tab of the virtual file, note that the conversation is now part of the permanent record.


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**Matthias Kramer**, Claims Agent

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My Favorites ▾

---

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	<a href="#">Weekly Status Meeting</a>
11:00 am	<a href="#">Recognition Luncheon</a>
2:00 pm	<a href="#">All Hands Call</a>

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR [Recent Searches](#) ▾

[Get Map](#) [Auto Fill](#)

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel**
  - Ben Good**
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet ▾

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

Accident Report Higher Authorization Required

Vehicle Repair Invoice

**Virtual Claims File** Edit | ? - X

Name ▾ Search

Investigation	Policy/Contract	Financials	Property/Damages	<b>Correspondence</b>
A & C Collision Center: Vehicle Repair Invoice				12/18/2006
Accident Photo: Vehicle damage, front and side view				12/11/2006
Adjuster Report: Third party property damage				12/11/2006
Automated Vehicle Repair Estimate				12/13/2006
Vehicle Titles: Search results				12/11/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Go](#)

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number ▾

[Go](#)

[Advanced Search](#)

**Information** Edit | ? - X

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[Banking Green Pages](#)

[Weather](#)

Step 12: Go to settle the claim and make payments.

Matthias Kramer, Claims Agent

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234  
 Insurer Innovative Insurance Policy Holder Mary Frazets  
 Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)  
[Conduct followup with Vehicle Repair](#)  
[Tow Truck services](#)  
[Rental car agreement](#)  
[Add other...](#)

**Claim Actions and Status**

Appraisal action completed. May approve invoice All vehicle repair actions have been completed. You may proceed to settlement.

Accident Report

Vehicle Repair Invoice

**Virtual Claims File** Edit | ? - X

Name Search

	Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
Matthias Kramer	Vehicle Repair: higher authorization			e-message	11/25/2006
Hertz	copy of Rental vehicle agreement			fax	11/18/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
 Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
 Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
 Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number


 

[Advanced Search](#)

**Information** Edit | ? - X

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[Claims Risk Analysis](#)  
[Banking Green Pages](#)  
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Step 13: Send payment for A&C Collision


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**Matthias Kramer**, Claims Agent

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**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Work Sheet** Edit | ? - X

Service Supplier: Worksheet

Carstar Garage	Send Payment
A & C Collision Center & Brake Specialists	Send Payment
Hertz Car Rental	Send Payment
Third Party Property Damage	Send Payment

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Virtual Claims File** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
Matthias Kramer	Vehicle Repair; higher authorization		e-message	11/25/2006
Hertz	copy of Rental vehicle agreement		fax	11/18/2006

**Team Directory** Edit | ? - X

Search

Advanced Search

**Sametime** Edit | ? - X

People Meetings Options Help

I am Active

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Lookup** Edit | ? - X

By Policy Number

Advanced Search

**Information** Edit | ? - X

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[Weather](#)

Step 14: Review the payment transaction and submit.

Matthias Kramer, Claims Agent

Home **My Workspace** My Tasks My Reports My Dashboard Help My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	<a href="#">Weekly Status Meeting</a>
11:00 am	<a href="#">Recognition Luncheon</a>
2:00 pm	<a href="#">All Hands Call</a>

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR  Recent Searches

**Sametime** Edit | ? - X

People Meetings Options Help

**I am Active**

- Claim Agents
  - [Evan Keel](#)
  - [Ben Good](#)
- [Billing](#)
- [Agency CSRs](#)

**Work Sheet** Edit | ? - X

Service Supplier Worksheet

Carstar Garage	<input type="button" value="Send Payment"/>
A & C Collision Center & Brake Specialists	<input type="button" value="Send Payment"/>
Hertz Car Rental	<input type="button" value="Send Payment"/>
Third Party Property Damage	<input type="button" value="Send Payment"/>

**Payment**

Type	Collision Repair
Payee	A & C Collision Center & Brake Specialists
Address	23 Nolans Lane, McLeods Crossing, Naperville, IL 60565
Method	EFT
Reserve	\$3,000.00
Deductible	\$500.00
Amount	\$2402.98 <a href="#">Adjust</a>
Reason	Collision

**Virtual Claims File** Edit | ? - X

Name Search

Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
<a href="#">Matthias Kramer</a>	Vehicle Repair; higher authorization		e-message	11/25/2006
<a href="#">Hertz</a>	copy of Rental vehicle agreement		fax	11/18/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

[Advanced Search](#)

**Information** Edit | ? - X

- [Insurance Manuals](#)
- [National Automotive Policy Handbook](#)
- [Claims Risk Analysis](#)
- [Banking Green Pages](#)
- [Weather](#)

Step 15: This concludes action on this claim. So logout of Matthias' portal.

**INNOVATIVE INSURANCE** thinking outside the box ©

Logout | FAQs | Site Map | Edit Profile | Personalize Desktop | Help

**Matthias Kramer**, Claims Agent

Home | **My Workspace** | My Tasks | My Reports | My Dashboard | Help | My Favorites

**Calendar** Edit | ? - X

**Open Calendar**

Today's Calendar

9:30 am	Weekly Status Meeting
11:00 am	Recognition Luncheon
2:00 pm	All Hands Call

**Map Info** Edit | ? - X

Address or Intersection

City

State Zip

OR Recent Searches

Get Map Auto Fill

**Sametime** Edit | ? - X

People Meetings Options Help

I am Active

- Claim Agents
  - Evan Keel
  - Ben Good
- Billing
- Agency CSRs

**Work Sheet** Edit | ? - X

Worksheet

Policy Number 321456798 Claim Number 1234

Insurer Innovative Insurance Policy Holder Mary Frazets

Loss Date 11/13/2006 [Printable Summary](#)

Diary [Contact claimant](#)

[Conduct followup with Vehicle Repair](#)

[Tow Truck services](#)

[Rental car agreement](#)

[Add other...](#)

**Claim Actions and Status**

Payment sent to A&C Collision for Vehicle repairs/2000 Honda Civic

**Virtual Claims File** Edit | ? - X

Name	Investigation	Policy/Contract	Financials	Property/Damages	Correspondence
Matthias Kramer	Vehicle Repair; higher authorization			e-message	11/25/2006
Hertz	copy of Rental vehicle agreement			fax	11/18/2006

**My Team** Edit | ? - X

Auto Appraiser  
[Stephen Neil](#)  
Telephone: 333-867-5410

Accounts Manager  
[Janet McLean](#)  
Telephone: 333-832-0097

Claims Adjuster  
[Paul Hernandez](#)  
Telephone: 356-232-4321

**Team Directory** Edit | ? - X

Search

Go

[Advanced Search](#)

**Lookup** Edit | ? - X

By Policy Number

Go

[Advanced Search](#)

**Information** Edit | ? - X

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[Claims Risk Analysis](#)

[Banking Green Pages](#)

[Weather](#)

This concludes the Insurance Claims Handling Day in the Life Demo

