

ClaimWizard Claim Phase & Action Item Worksheet

To help get your company configured in ClaimWizard with Action Items and Phases, this worksheet has been designed to walk you through the data and workflow process. By completing this worksheet you will have a better understanding of how to transcribe your company's unique claim processing steps into a templated workflow (Action Items) in ClaimWizard.

Instructions:

Write in the steps in order that a claim takes to fulfill each Claim Phase and associated Action Items. Each Phase and associated Action Items are on one page so that you can reorder as needed.

- Prior Phase:** The Phase a claim was in before (if applicable.)
- Entry Phase:** The task that marks the start of the Phase.
- Final Task:** The task that must be successfully completed to move to next Phase.
- Exit Phase:** The Phase typically entered after successful completion of all tasks in this Phase.

While not standard across all Public Adjusting companies or even within different claim / peril types within a company, below are the typical phases that a claim may go through from pre-contract to settlement. Note that the phrasing of each Phase may be different in your company or region.

Claim Phases

Claim Originated

— contract signed, workflow initiated

Notifying Carrier

— compiled paperwork, delivery confirmation

Scheduling Inspection

— assignment of carrier adjuster, appoint set

Inspection

— inspection held, photos/paperwork collected

Negotiation

— discussions with carrier adjuster

Mortgage Processing

Recovering Depreciation

Initial Payment

— receive initial payment, start appropriate disbursements

Final Payment

— receive final payment, start appropriate disbursements

Settled

— all monies received

Ready to Close

— all monies disbursed

Under Review

— under review

Appraisal*

Coverage Dispute*

Collections*

Litigation*

Mediation*

On Hold*

* Generally Considered an Exception Phase

Use a separate sheet of paper to outline workflows for any Exception Phases based on the attached worksheets.

Default Priority

Important

- General task status

Critical

- Task status best suited to tasks with 'hard' deadlines or when missing a deadline would put the claim at risk

Due Date

- Task will be due in _____ business / calendar days after it is created.

Assign To

Select one or more groups/users to assign (multiples can be selected.) This Action Item will then appear on each assigned user's **Home / Workbench / Upcoming Action** Items list until it is completed or escalated.

- Group
- Claim Role
- Staff

Completion Actions

This is where you list the tasks that must be completed in this Action Item. Multiple actions can be defined. Actions are executed in the order specified.

Create Action Item

- Action Item must be created prior to selection

Add Log Entry

- Log entry must be selected from dropdown menu of preexisting Claim Activity Events

Send Email

- Recipient: Client / Group / Role / User

Set Claim Phase

- Entry must be selected from dropdown menu of preexisting Claim Phases

Overdue Items

If a task is not completed successfully or by the appointed deadline you can configure an escalation path to follow. Multiple actions can be defined. Actions are executed in the order specified.

Create Action Item

- Action Item must be created prior to selection

Add Log Entry

- Log entry must be selected from dropdown menu of preexisting Claim Activity Events

Assign

- Group / Role / User

Re-assign

- Group / Role / User

Send Email

- Recipient: Client / Group / Role / User

Note / Instructions

- Here any notes you may want to include on how to perform this Action Item can be included.

Claim Originated

Prior Phase: Pre-Claim

Entry Phase: Claim Originated

Urgent? Due Date: Assign To:

1.	(Sample) Policy holder info (name, loss address, phone, email, etc.)		1b day	Adjuster or Sales Rep
2.	(Sample) Preliminary policy review		1b day	Adjuster or Sales Rep
3.	(Sample) Request copy of Dec / Policy		1b day	Office Staff
4.	(Sample) Generate Proof of Loss	X	1b day	Office Staff
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

Final Task: (Sample) Generate Proof of Loss

Office Staff

Exit Phase: (Sample) Notify Carrier

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Notify Carrier

Prior Phase: Claim Originated

Entry Phase: Notify Carrier

Urgent? Due Date: Assign To:

		Urgent?	Due Date:	Assign To:
1.	(Sample) Contact policyholder for appointment	X	1b day	Office Staff
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
Final Task:	(Sample) Contact policyholder for appointment	X	1b day	Office Staff

Exit Phase: (Sample) Inspection

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Inspection

Prior Phase: Scheduling Inspection

Entry Phase: Inspection

		Urgent?	Due Date:	Assign To:
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1.	(Sample) Hold inspection	X	1b day	Office Staff
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2.	(Sample) Order roof / wall / weather etc. report		1b day	
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3.	(Sample) Draft Estimate		5b days	
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4.	(Sample) Send Estimate to Carrier for Review	X	1b day	
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5.	(Sample) Prepare Statement of Loss	X	5b days	
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6.				
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7.				
----	--	--	--	--

8.				
----	--	--	--	--

9.				
----	--	--	--	--

10.				
-----	--	--	--	--

11.				
-----	--	--	--	--

12.				
-----	--	--	--	--

Final Task:	(Sample) Receive confirmation of Statement of Loss from Carrier	X	1b day	Office Staff
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Exit Phase: (Sample) Negotiation

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Negotiation

Prior Phase: Inspection

Entry Phase: Negotiation

Urgent? Due Date: Assign To:

1. (Sample) Enter in all numbers into Settlements & Offers X 1b day Office Staff

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task: X 1b day Office Staff

Exit Phase: (Sample) Mortgage Processing

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Mortgage Processing

Prior Phase: Negotiation

Entry Phase: Mortgage Processing

Urgent?

Due Date:

Assign To:

1. (Sample) Enter in all numbers into Settlements & Offers

X

1b day

Office Staff

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) Recovering Depreciation

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Recovering Depreciation

Prior Phase: Mortgage Processing

Entry Phase: Recovering Depreciation

Urgent?

Due Date:

Assign To:

1. (Sample)

X

1b day

Office Staff

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) Initial Payment

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Initial Payment

Prior Phase: Recovering Depreciation

Entry Phase: Initial Payment

Urgent?

Due Date:

Assign To:

1.	(Sample)	X	1b day	Office Staff
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2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) Final Payment

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Final Payment

Prior Phase: Initial Payment

Entry Phase: Final Payment

Urgent?

Due Date:

Assign To:

1.	(Sample)	X	1b day	Office Staff
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2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) Settled

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Settled

Prior Phase: Final Payment

Entry Phase:	Settled	Urgent?	Due Date:	Assign To:
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1.	(Sample)	X	1b day	Office Staff
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2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) Closed

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Ready to Close

Prior Phase: Settled

Entry Phase: Ready to Close

Urgent?

Due Date:

Assign To:

1. (Sample)

X

1b day

Office Staff

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) N/A

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email

Under Review

Prior Phase: Ready to Close

Entry Phase: Under Review

Urgent?

Due Date:

Assign To:

1. (Sample)

X

1b day

Office Staff

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

Final Task:

Exit Phase: (Sample) N/A

Escalation Path: Action Item / Log Entry / Assign / Re-Assign / Email
