Chapter 11

Claims

IN THIS CHAPTER

- Adding a Claim
- * Populating the Claim form
- * Tracking the Claim
- * Delivering the Claim form
- * Closing and Reopening the Claim

Adding a Claim

When a claim is added in Nexsure, the ACORD claim form, applicable to the claims line of business, is generated. A portion of the claim form can be populated with information contained in the application. The details of the claim however, will need to be entered on the form manually. The claim form can then be submitted to the carrier.

If clients of the branch report claims directly to the carrier, a claim can be created without entering details or as desired for tracking purposes only. The adjustor's name and phone number, along with the claim number and other pertinent claim information can be entered on the **claims** tab for tracking purposes.

HOW to Add a Claim

- Locate the appropriate client through **SEARCH** and click the **SERVICING** link on the **Client** menu.
- Click the **Claims** option on the **Servicing** screen.
- A Line of Business must be selected from the drop-down box provided.
- The description field at the top of the **Servicing** menu defaults with Process Claim. If a description of the claim is desired, highlight the default text and type a new description for the claim being added. The description is displayed in the Memo field of the **Action** created by adding the claim.
- Enter the date of loss for the claim in the effective date field to the right of the description field on the Servicing screen. The Calendar icon may be used or type the date in using the required format (##/##/#####). The date of loss entered here populates the date of loss on the claim form and the date of loss field on the claims tab.
- Click the [Next] link in the upper right corner of the Servicing menu to display the policies meeting the selected criteria.
- The default filter settings include copies of the policy in history that may be applicable to the claim's date of loss.

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Select the applicable policy and click [Next] to display the underwriting tab. If the date of loss entered on the servicing screen is outside the policy term of the selected policy, a warning will display. The user may click OK to continue to the selected policy or click Cancel to return to the policy selection list.

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• The **underwriting** tab displays the policy header with the normal blue background outlined with a red border.

Note: The underwriting tab of the policy contains the Loss Notice. The claim is tracked and maintained under the claims tab.

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Notes

Populating the Claim Form

Open claims are easy to identify visually after clicking the **POLICIES** link on the **Client** menu since they are displayed with a red border. Claim forms may be populated manually or by using the assistance of the population option.

HOW to Populate the Claim Form

Using the **Populate** icon populates the claim form with the selected applicable information from the line of business application. The details of the claim can then be completed manually using the **navigation** tab on the right hand side of the underwriting screen.

• After adding the claim the underwriting screen is displayed ready to populate the claim form. To access again after interruption, select the client from the **SEARCH** page and click the **POLICIES** link

on the **Client** menu. Clicking the **Details** icon of the policy displays the underwriting screen with the pending claim form ready for completion at the top of the **navigation** tab.

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Note: Open claims are displayed with a red border.

- □ ACORD 1 Property Loss Notice: This form is used for reporting commercial and personal lines property losses.
- ACORD 2 Auto Claim: This form is used for reporting commercial and personal lines auto losses.
- □ ACORD 3 General Liability Notice of Occurrence: This form is used for reporting commercial and personal liability losses.
- □ ACORD 4 Workers Comp First Report of Injury or Illness: This form is used for reporting a first notice of a claim for injury or illness by an employee.

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• For assistance in populating the form, click the **Populate** icon on the underwriting screen. An acceptance pop-up is displayed. To accept assistance, click the **Agree** option and click the **Accept** button.

Note: The information in the line of business application(s) must be completed to populate to the claim form and other forms.

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- Click either the Vehicles or the Drivers check boxes, or click both check boxes if the loss pertains to both vehicles and drivers listed on the application.
- Click the Next button to continue with the population process. To go back to the previous page select the Back or Cancel button to abort the populate process.

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- All drivers listed on the application display. Select the **Driver** involved in the loss by clicking the appropriate option.
- Before selecting the Finish button, make sure to click the drop-down box at the bottom of the pop-up window and make all selections available. In this case Vehicles is selected.

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- All vehicles listed on the application display. Select the vehicle involved in loss by clicking the appropriate option.
- Click the **Finish** button. Click **Back** to page back, click **Cancel** to abort.
- The population process has prefilled the vehicle and/or driver information from the line of business application to the claim form.

Note: The population workflow is similar on all claim forms.

HOW to Populate the Manually Entered Claim Details

After using the **Populate** icon to populate the claim form with information contained in the line of business application, the manual claim details can be added by using the **navigation** tab on the right side of the Underwriting screen.

- To manually enter data, click the plus [+] in front of the Pending Claims form in the navigation tab to open the form. The List link may be used to quickly enter data, but make certain to click the Save Form link to keep entries.
- If entering data by using the **navigation** tab, click on each link in the navigation tree and populate the form as necessary. Make sure to use the previous and next or save changes links to keep changes.
- Once all changes have been made and saved on the applicable claim form, click the **Print** link to preview or print the form. If the form is to be delivered, proceed to the **Delivery** link or to close the form, click the **Underwriting** link in the **navigation** tab to close the form.
- See the **Keeping Track of Open Claims** section in this chapter to track all open claims.

Note: The **Populate** icon remains active and the **Insync** check box will not be checked after manually entering information on the claim form. Do not repopulate, as this will overwrite the manual changes entered on the form.

HOW to Add Adjustor and Claims Information

After an adjustor has been assigned to the claim, enter into Nexsure by accessing the client by searching and then clicking the **CLAIMS** link on the **Client** menu and the **Details** icon of the claim or from **HOME** > **CLAIMS** by clicking the white **Details** icon to display the claim details.

• The claim detail screen contains basic information about the claim such as the adjustor name, phone number and email address.

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c Laiman Details Details Details Details	Memo Date Posted nt Summary 4 3 4	Multiple injuries result wavy shipping cart w glass materials into . Reported to Carrier was assigned to han Adely Zelner Claimant Name Adely Zelner Clint Henderson Cynthia Svenson Melinda Jackson elsonpelterskimper	Ulting from run while unloading and customer vehicle, and Kevin Massa die the claim. V Contact Name Adely Zelner Clint Henderson Cynthia Swenson Melinda Jackson Neisonpeiterskimp;	Phone Number (256) 112- 5587 (256) 885- 7256) 885- 7256) 885- 7556) 887- 8859 rf (256) 837-	Fax Number (256) 237- 1122	E-Mail maryo@xdbi.com maryo@xdbi.com	[Add h Note	ew Claimant) Remove E E E E E E E E E E E	
(Jaiman Details Details Details Details	Memo Date Posted nt Summary # 1 2 3 4 5 N	¹ Multiple injuries result wavy shipping cart w glass materials into - Reported to Carrier was assigned to han a climat Name Adely Zelner Climt Henderson Cynthia Swenson Melinda Jackson elsonpelterskimper boodfellowmanship Schada (Sichar Carrier)	Ulting from run while unloading and customer vehicle, and Kevin Mason die the claim.	Phone Number (256) 112- (256) 285- (256) 285- 7225 (256) 285- 7225 (256) 237- 8699 rf (256) 237- 4444	Fax Number (256) 227- 1122	E-Mail maryo@xdti.com maryo@xdti.com	[Add h Note	ew Claimant] Remove Be Be C Be C Be C Be C Be C Be C Be C	
total P Claiman Details Details Details Details Details Details Details Details Details Details	Memo Date Posted int Summary 4 3 4 5 8	Multiple injuries result wavy shipping cart w glass materials into - Reported to Carrier was assigned to han Carrier was assigned to han Corrier was a	Ulting from run while unloading and customer vehicle. and Kevin Massa and die the claim.	Phone Number (256) 112- 5255 (256) 885- 7525 (256) 885- 7525 (256) 885- 7525 (256) 237- 4444 (256) 237- 5588	Fax Number (256) 237- 1122	E-Mail maryo@xdti.com maryo@xdti.com	[Add h Note	ew Claimant) Remove E E E E E E E E E E	
total P Claiman Details Details Details Details Details Details Details Details Details Details Details Details Details	Memo Date Posted nt Summary 4 3 4 5 N 6 5	¹ Multiple injuries resultance of the second s	Jiling from run while unloading and customer vehicle. and Kevin Massa and die the claim.	Phone Number (256) 112- 5367 (256) 885- 2225 (256) 885- 7525 (256) 825- 7525 (256) 237- 2556 rf (256) 243- 3586 t t (256) 435-	Fax Number (256) 237- 1122	E-Mail maryo@xdti.com maryo@xdti.com	[Add N Note	ew Claimant) Remove E E E E E E E E E E	
Claiman Details Details Details Details Details Details Details Details Details	Memo Date Posted nt Summary 4 5 N 6 6 7 S	Multiple injuries result wavy shipping cart w glass materials into - Reported to Carrier was assigned to han Adely Zelner Claimant Name Adely Zelner Clint Henderson Cynthia Svenson Melinda Jackson elsonpalterskimper soodfellowmanship Roberta Singleton wasana Primerholt	Ulting from run while unloading and customer vehicle, and Kevin Maximum idle the claim.	Phone Number (256) 112- (256) 2557 (256) 237- 2559 (256) 237- 259 (256) 237- 2699 af (256) 237- 2694 af (256) 237- 2588 t (256) 435- 6677	Fax Number (256) 237- 1122	E-Mail maryo@xdti.com maryo@xdti.com	[Add h Note	ew Claimant] Remove E E E E E E E E E E E	

Note: An action, with an open status, is created through the Servicing process. Nexsure tracks all open claims on **HOME** > **CLAIMS** and creates an open follow up, stored on the claims tab. Actions will be discussed in a later chapter.

- Type in the Adjustor Name, Adjustor Phone and Adjustor Email assigned to the claim.
- The Date of Loss and Date Reported prefill from the Date of loss entered on the servicing screen. Use the Calendar icon or key the correct date in using the correct formatting if the dates need modification. The Date Closed box populates to the current date when the claim is closed or if a date is entered prior to closing, that date will remain in the field. Re-opening the claim will remove the closed date from the claim.
- Select the appropriate Claim Stage for the claim. Selections in this list are based on those set up by your Nexsure administrator and are unique to each organization.

- Enter the Claim Number, Estimated and Reserved Amounts in their appropriate fields. Total Paid Amount is calculated and entered by Nexsure as claim payments are added.
- Enter any **Memo** appropriate to the claim.
- The **Date Posted** box automatically populates with the date the claim is closed and cannot be changed by the user. If the claim is re-opened, the posted date is removed.

Note: Use the navigation tab on the right to quickly access the Claim form.

 Click the Save Changes link in the navigation toolbar under the policy header to save the changes prior to adding a claimant. Add a claimant if you are adding payments on the claim payments tab.

Note: The information on the **claims** tab can be updated on an ongoing basis, remember to click the **Save Changes** link when updating the **claims** tab.

See the **Keeping Track of Open Claims** section in this chapter to track open claims.

Claimant Summary

Claimants added to the Claimant Summary will be available to select when you add payments on the claim payments tab. Claimants include the named insured and anyone who will be recorded as receiving a claim payment. The claim payment screen requires selection of a Claimant Name from the field drop-down box. Be certain at least one claimant is added to the claim prior to adding claim payments.

Click the [Add New Claimant] link.

		_				_				D Property - Con	nmerci
ails	Торіс	Туре	Status				escription			linst	nuction
7	Claim	Annotation	Closed	GL Claim Reporte	a- Multiple inju	ries	Memo				
				Multiple injuries f	rom run away :	shipping cart being	g loaded into cu	stomer vehicle.			
of Bus	siness: Gen	eral Liability - Comme	ercial								
stor I	nformation										
Adjus	tor Name:	Kevin Mason									
Adjust	tor Phone:	205-900-0987	5								
Adius	stor Email:		-								
ms Inn	ormation:	07/22/2000									
		07/23/2009	12121 22121								
Date	Reported:	07/23/2009	82								
Da	te Closed:		191								
Cla	aim Stage:	Subrogation	~								
	Claim No:	124545456									
timate	d Amount:	50000									
eserve	d Amount:	100000									
tal Pai	d Amount:			_							
	Memo:	Multiple injuries resu away shipping cart w	ulting from run vhile unloading								
		glass materials into	customer veh	icle.							
		was assigned to han	dle the claim.	~							
Da	te Posted:										
imant !	Summary:								Add New Claimant]		
tails 4	* (laimant Name	Co	ontact Name	Phone	Fax Number	E-Mail	Note	Remove		
					Number						

- Enter the Claimant Name and other contact information on the claimant detail screen.
- Click [Save] to add the claimant to the claim and return to the Claimant Summary.

Claimant details may be updated by clicking the **Details** icon, updating information and clicking [Update] to save the changes.

laimant Si	ummary	:						[Add New Claimant]
Details	#	Claimant Name	Contact Name	Phone Number	Fax Number	E-Mail	Note	Remove
*	1	Donald Alley						B
*	2	Lawrence Fasulo						B
								claim payments 🗸 det

Claimant Names can be used to search for claims from HOME > CLAIMS and from Client menu > CLAIMS.

Adding Multiple Claim Payments

The Total Paid Amount on the Claims Detail screen is only updated by adding payments on the Claim Payments tab. To access the Claim Payments, click the claim details icon on the Client Claims summary page. Then click the Claim Payments tab. It is important to note that once a claim payment exists on the claim, the claim may not be aborted.

nexs	sure						но	me Help Setup Logout
		SEARCH ORGANIZAT	ION REPORTS	CAMPAIGNS		Book	marks: Expand	Add Remove Selected 🟾 🌮
CLIENT PRO	FILE OP	PORTUNITIES MARKETIN	G POLICIES	CLAIMS SERVICING	ATTACHMENTS ACTI	ONS TRANSACTIONS	DELIVERY	T-LOG
Client Nan	ne: Lawı	ence Fasulo						Personal Account
claims								
				Showing Page 1	of 1 🕅 📘	-		Filters: [Show]
Details	Assign	Policy Number Line Of Business Claim Number	Policy Stage Policy Status Claim Status	Mode Policy Description Claim Stage	Taken By Date Of Loss	Paid Amount Reserve Amount	Term	Issuing Carrier Adjustor
>	20	PA1491423815	Policy In Force	New			10/01/2008 10/01/2009	
		(Auto - Personal (PAUTO))	Open		Betsy Cormier 02/12/2009	\$0.00 \$0.00		Hartford Accident and Unassigned
	1	IV stopped at light. Rear	ended by OV.					
								claims

Click the [Add New Payment] link to add the payment.

nexsure							HOME	e Help Setup	LOGOUT
SE	ARCH ORGANIZATION	REPORTS	CAMPAIGNS			Bookr	marks: Expand	Add Remove Sele	cted 💖
CLIENT PROFILE OPPORTU	NITIES MARKETING	POLICIES	CLAIMS SERVICING	ATTACHMENTS A	ACTIONS TRA	NSACTIONS	DELIVERY T-	LOG	
Client Name: Lawrence	Fasulo							Personal Ac	count
underwriting policy info a details claim payments	issignment attachments	actions	qualification history	transactions claims	5				
	-	н. ч	Showing Page (of 0 🕨 🕨	Filter	: [Show]		[Add New Paymer	nt]
Draft Da Details Draft i	ate # Amount	Claimant (Payee)	: Payment Type	Description	Reduce reserves? U	Last pdated By	Date Updated	Remove	

		ne sure
Payment type:	Rental	*
Draft date:	2/13/2009	
Draft#:	19184	
Payment amount: \$	400.00	*
Payee:	Dollar Rent-A-Car	*
Description:	rental deposit	
Claimant:	Lawrence Fasulo	*
Reduce reserves?		
* indicates required field		

Enter the payment information. All fields with a red * asterisk must be completed to add the payment.

Note: Payment Types are added in SETUP > Lookup Management under the Category of Policy > Claim Payment Types. These must be added prior to adding payments.

To view the payments that were added, access the **claim payments** tab.

ne	sur	е							НОМЕ	HELP SETU	P LOGOUT
		SEARCH	ORGANIZATION	REPORTS CAN	IPAIGNS			Bookma	rks: Expand A	dd Remove S	elected 🐲
CLI	NT PROFILE	OPPORTUNITIES	MARKETING	POLICIES CLA	IMS SERVICING	ATTACHMENTS	ACTIONS	TRANSACTIONS D	ELIVERY T-LO	DG	
Clie	nt Name: L	awrence Fasulo)							Personal	Account
d	etails claim	olicy info Y assignment	nt Y attachments	actions qual	ification history	transactions cla	iimsFi	lters: [Show]		[Add New Pay	ment]
	Details	Draft Date Draft #	Amount	Claimant (Payee)	Payment Type	Description	Reduce reserves?	Last Updated By	Date Updated	Remove	
	•	2/13/2009 19184	\$400.00	Lawrence Fasulo (Dollar Rent-A- Car)	Rental	rental deposit	No	Betsy Cormier	2/13/2009		A

HOW to Use the Claims Tab Summary Screen

The **claims** tab summary view will track both open and closed claims for the client at the policy level. The summary view will give you pertinent information regarding claims on a policy.

nex	sure							HOME HELP	SETUP LOGOUT
	SEARCH	ORGANIZATION	REPORTS CAP	MPAIGNS			Bookmark	s: Expand Add Remo	ve Selected 🐨
CLIENT P	ROFILE OPPORTUNITIES	MARKETING	POLICIES CLA	IMS SERVICING	ATTACHMENTS	ACTIONS	TRANSACTIONS	DELIVERY T-LOG	
Client N	ame: Jane Cooke							Perso	nal Account
underwrit	ing policy info assignme	ent attachments	actions quali	ification history	transactions cla	aims summary	of insurance cl	assifieds delivery	
Details	Policy Number Line Of Business	Policy Stage Policy Status	Policy Mode	Date Of Loss Date Taken	Paid Amount Reserve Amount	Term	Claim Status Claim Stage	Issuing Carrier Adjustor Name	Remove
	PA123456 Auto - Personal (PAUTO)	Policy Reinstated	New	2/6/2008 2/6/2008	\$755.00 \$0.00	2/4/2008 2/4/2009	Open	Hartford Fire Unassigned	E
_	delivery $igsymbol{\label{eq:classification}}$	ieds $igstyle $ summary of	insurance 人 claim	s $\sqrt{\text{transactions}}$	history $igstyle {\sf qualificat}$	tion $igstarrow$ actions $igstarrow$	attachments 🙏 a	ssignment λ policy info λ	underwriting

- Locate the appropriate client through SEARCH and click the POLICIES link on the Client menu to display all policies. To access the policy underwriting screen, click the Details icon of the appropriate policy.
- Click the **claims** tab, a summary view of all claims for the selected policy only.

Heading Label	Description
Policy Number and Line of Business	The policy number and line of business for this claim.
Policy Stage, Status and Mode	This information defines important information about the policy itself.
Date of Loss and Date Taken	As long as these dates have been entered on the Claim detail screen, these dates are populated
Paid and/or Reserve Amount	If these amounts are entered on the Claim detail screen an amount other than 0.00 is displayed. Enter these amounts as this data is received.
Policy Term	The term of the policy is important when identifying claims.
Claim Status and Claim Stage	The status shows the claim is either Open or Closed. Claims may only be closed and reopened on the Claims detail screen. Claim Stage is determined by the agency and is an optional selection on the claim details screen.
Issuing Carrier and Adjustor Name	The issuing carrier comes from the policy the claim was added to and the Adjustor name only displays if entered on the Claims detail screen.

Notes

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Tracking the Claim

Policies with a claim, in an open or closed status, can be tracked from the **Home** menu or the **Client > CLAIMS** menu. The **HOME > CLAIMS** screen displays (depending on your filter settings) all open and/or closed claims for the agency. The **Client > CLAIMS** menu only displays claims applicable to the selected client.

HOW to Keep Track of Claims from the Home Menu

The **HOME** > **CLAIMS** screen serves as a way to keep track of all policies with an open claim by default, however, closed claims may be displayed as desired by using the filters at the top of the page. The **Home** menu is accessible by clicking on the **HOME** link on the **Utility** menu in the upper right corner of the screen. The **HOME** > **actions** tab will be the first screen displayed. Click the **CLAIMS** link to display the **claims** tab.

Note: All claims, open or closed can be found on the **HOME > CLAIMS** page. The default setting configured in the [Show] filter option determines what is displayed.

Hello, Mar	y Oberlei	itner							► Home
claims									
All			*	Showin	g Page 1 of 1 🕨 🕅	1 🗸	24	[Export]	Filters: [Show]
Details	Assign	Client Name Line Of Business Claim Number	Date Of Loss Claim Status	Mode Claim Stage	Taken By Updated By	Claimant	Paid Amount Reserve Amount	Policy Term	Issuing Carrier Adjustor
2		Nunnally's Glass & Framing I							
	20	General Liability - Commercial	07/23/2009 Open	New Subrogation	Mary Oberleitner Mary Oberleitner	20	\$0.00 \$100,000.00	07/06/2009 07/06/2010	Auto-Owners Insuranc Kevin Mason
		GL Claim Reported- Multiple in	njuries						
	1	Multiple injuries from run awa	ay shipping cart being lo	aded into customer ve	ehicle.				
•		Cable One (Commercial Lines	;)						
>	20	Workers Compensation	10/02/2009 Open	Renew	Mary Oberleitner	20	\$100.00 \$0.00	07/23/2009 07/23/2010	Auto-Owners Insuranc Unassigned
		Nancy Donahue fell at work a	and hurt wrist						
	(Nancy Donahue fell at work a	and hurt wrist						
>	20	Workers Compensation	12/15/2009 Open	Renew	Mary Oberleitner Mary Oberleitner		\$0.00 \$0.00	07/23/2009 07/23/2010	Auto-Owners Insuranc Unassigned
		Clyde Henderson lost right in	dex finger when rolling o	able on truck					
		Clyde Henderson lost right in	dex finger when rolling o	able on truck					
	20	Auto - Commercial	02/24/2010 Open	New	Mary Oberleitner Mary Oberleitner	20	\$0.00 \$0.00	06/01/2009 06/01/2010	AIG National Insuranc Nelson Gregs
		Driver ran red light hitting an	other vehicle						
	(Driver ran red light hitting an	other vehicle						
7		Oxford Airport (Commercial	Lines)						
	20	Property - Commercial	12/26/2009 Open	Renew	Mary Oberleitner Mary Oberleitner	20	\$10,000.00 \$0.00	08/20/2009 08/20/2010	AIG National Insuranc Unassigned
		Property damage claim							
	ø	Property damage claim							

- All claims that meet the search criteria are displayed in a summary view. Each client is displayed with at least two Details icons. If there is more than one claim, each claim will have its own Details icon.
 - Clicking the filters [Show] link displays the search criteria defaults set by Nexsure or specified by the user. The search results are based off the defaults setup in this filter. The defaults can be changed on an individual basis, or the filter can be saved according to the user's specifications by entering the search criteria and clicking the Save Filter Settings check box.
- Clicking the first Details ricon, with the dark blue border, will display the card file for the client.
- Clicking the second **Details** icon displays the **claims details** for the claim selected.

Clicking the Claimant icon displays the list of claimants added to the claim. If no claimants are added, the icon will not be displayed.

Hello, Mar	y Oberle	itner							► Home
All			*	I Showing Pa	ge1of1 ▷ 🕅	1 🗸		Export]	Filters: [Show]
Details	Assign	Client Name Line Of Business Claim Number	Date Of Loss Claim Status	Mode Claim Stage	Taken By Updated By	Claimant	Paid Am Reserve Am	ount ount Policy Term	Issuing Carrier Adjustor
>		Nunnally's Glass & Framing Inc	. (Commercia						
P	۵	General Liability - Commercial	07/23/2009 Open	New Subrogation	Mary Oberleitr Mary Oberleitr	ier 🌆	\$ \$100,00	0.00 07/06/2009 0.00 07/06/2010	Auto-Owners Insurant Kevin Mason
	6	GL Claim Reported- Multiple inj Multiple injuries from run away	uries shipping cart being	Chttp://dev1web2.nex	sure.com/?clair	nid=1084 - Claimar	nts - Microsoft Inter	net E 🔳 🗖 🔀	
>		Cable One (Commercial Lines)		Chimant List					
*	۵	Workers Compensation	10/02/2009 Open	Claimant List	me	Contact First Name	Last Name	Phone #	Auto-Owners Insuran: Unassigned
	1	Nancy Donahue fell at work an Nancy Donahue fell at work an	d hurt wrist d hurt wrist	Adely Zelner		Adely	Zelner	(256) 112-5587	
>	2	Workers Compensation	12/15/2009 Open	Clint Henderson		Clint	Henderson	(256) 885-2255	Auto-Owners Insurant Unassigned
		Clyde Henderson lost right inde	ex finger when rolling	Cynthia Swenson		Cynthia	Swenson	(256) 885-7525	-
	1	Clyde Henderson lost right inde	ex finger when rolling	Melinda Jackson		Melinda	Jackson	(256) 237-8899	
>	2	Auto - Commercial	02/24/2010 Open	Nelsonpelterskimper Goo	dfellowmanship	Nelsonpelterskimper	Goodfellowmanship	(256) 237-4444	AIG National Insuranc Nelson Gregs
	~	Driver ran red light hitting ano	ther vehicle	Roberta Singleton		Roberta	Sngleton	(256) 435-5588	
	(Driver ran red light hitting ano	ther vehicle nes)	Susanna Primerholt		Susanna	Primerholt	(256) 435-6677	
	2	Property - Commercial	12/26/2009 Open	Xazavier Victrilium		Xazavier	Victrilium	(256) 885-2211	AIG National Insuranc Unassigned
		Property damage claim						Close	
	1	Property damage claim							

HOW to View Claims from the Client Menu

- Access the appropriate client through **SEARCH.**
- Click the CLAIMS link on the Client menu. All claims for the client will be displayed. All open and closed claims are displayed when this link is selected.

n	exsi	ıre							HOME HEL	.p Setup Support Logout
			SEARCH ORGANIZATION R	EPORTS CAMPAIGNS	ELINKS				Bookmarks: Expa	ind Add Remove Selected 💖
CL	CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVERY T-LOG									
Cli	ent Name	e: Nunna	lly's Glass & Framing Inc.							Commercial Account
cla	ims									
					I Showing	Page 1 of 1 🕨 🕅	1 🛩			Filters: [Show]
	Details	Assign	Policy Number Line Of Business Claim Number	Policy Stage Policy Status Claim Status	Mode Policy Description Claim Stage	Taken By Date Of Loss	Claimant	Paid Amount Reserve Amount	Term	Issuing Carrier Adjustor
	Þ	2	CPP-76000	Policy In Force	New Package Policy				07/06/2009 07/06/2010	
	>		(General Liability - Commercial	Open	Subrogation	Mary Oberleitner 07/23/2009	2	\$0.00 \$100,000.00		Auto-Owners Insurant Kevin Mason
			GL Claim Reported- Multiple in	juries						
		(Multiple injuries from run awa	y shipping cart being	loaded into customer vehi	icle.				
_										claims

- If the claim is not displayed, click the [Show] filter, change the search criteria and click the Search button to initiate a new search.
- All claims that meet the search criteria display in a summary view. Each claim is displayed with two Details ricons.
 - Clicking the filters [Show] link displays the search criteria defaults set by Nexsure.
- Clicking the first **Details** icon, with the dark blue border displays the **underwriting** tab for the policy with the claim.
- Clicking the second **Details** icon displays the **claims detail** for the claim selected.

HOW to Use the Claims Summary Screen

There can be numerous claims displayed for a client. The default set up in the **[Show]** filter will determine what is displayed. The summary view will give you pertinent information regarding the claim.

- Access the appropriate client through **SEARCH**.
- Click the **CLAIMS** link on the **Client** menu.

~~~~									
		SEARCH   ORGANIZATION   R	EPORTS   CAMPAIGNS	i   ELINKS				Bookmarks: Exp	and   Add   Remove Selected
IENT PROFI	LE   OPPC	RTUNITIES   MARKETING   PC	LICIES   CLAIMS	SERVICING   ATTACHMENTS	5   ACTIONS   TRANSACT	IONS   DELIVERY	T-LOG		
ent Name	e: Nunna	lly's Glass & Framing Inc							Commercial Accou
ims									
				I Showing I	Page 1 of 1 ▷ 🕅	1 🗸			Filters: [ Show ]
Details	Assign	Policy Number Line Of Business Claim Number	Policy Stage Policy Status Claim Status	Mode Policy Description Claim Stage	Taken By Date Of Loss	Claimant	Paid Amount Reserve Amount	Term	Issuing Carrier Adjustor
Þ	20	CPP-76000	Policy In Force	New Package Policy				07/06/2009 07/06/2010	
<b>&gt;</b>		(General Liability - Commercial	Open	Subrogation	Mary Oberleitner 07/23/2009	2	\$0.00 \$100,000.00		Auto-Owners Insuranc Kevin Mason
		GL Claim Reported- Multiple in	ijuries						
	1	Multiple injuries from run awa	y shipping cart being	loaded into customer vehic	cle.				

- Clicking the second Details right icon will display the claims tab for the selected claim.
- Holding the cursor over the Policy Number, Line of Business and Claim Number fields will display the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information.
- Holding the cursor over the Policy Stage, Policy Status and Claim Status fields will display the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information. The Claim Status is displayed as either Open or Closed.
- The **Mode** and **Policy Description** pertain to the policy with the claim. **Claims Stage** is determined by the agency and selected on the claim details.
- The Taken By will display the name of the person who entered the claim in Nexsure along with the Date of Loss entered on the servicing screen.
- Clicking the Claimant icon displays the list of Claimants added to the claim. If no claimants are added, the icon will not be displayed.

n	exsl	ire							HOME   HELP	SETUP   SUPPORT   LOGOUT
			SEARCH   ORGANIZATION   R	EPORTS   CAMPAIGNS	ELINKS				Bookmarks: Expand	i   Add   Remove Selected 🚿
CL	IENT PROFIL	E   OPPO	RTUNITIES   MARKETING   PO	LICIES   CLAIMS   SE	RVICING   ATTACHMENTS	ACTIONS   TRANSAC	TIONS   DELIVERY	T-LOG		
Cli	ent Name	: Nunnal	ly's Glass & Framing Inc.							Commercial Account
cla	ms									
					I Showing P	age 1 of 1 ⊨ 🕅	1 🗸			Filters: [ Show ]
	Details	Assign	Policy Number Line Of Business Claim Number	Policy Stage Policy Status Claim Status	Mode Policy Description Claim Stage	Taken By Date Of Loss	Claimant	Paid Amount Reserve Amount	Term	Issuing Carrier Adjustor
	Þ	2	CPP-76000	Policy In Force	New Package Policy				07/06/2009 07/06/2010	
	<b>&gt;</b>		(General Liability - Commercial	Open	Subrogation	Mary Oberleitner 07/23/2009	2	\$0.00 \$100,000.00		Auto-Owners Insurant Kevin Mason
		<b>Ø</b>	GL Claim Reported- Multiple in Multiple injuries from run awa	ijuries y shipping cart being loa	aded 🌈 http://dev1we	b2.nexsure.com/?clai	mid=1084 - Claimar	nts - Microsoft Inter	net E 💶 🗖 🔀	
-					Claimant List					claims
					Clair	mant Name	Contact First Name	Last Name	Phone #	
					Adely Zelner		Adely	Zelner	(256) 112-5587	
					Clint Henderson		Clint	Henderson	(256) 885-2255	
					Cynthia Swenson		Cynthia	Swenson	(256) 885-7525	
					Melinda Jackson		Melinda	Jackson	(256) 237-8899	
					Nelsonpelterskim	nper Goodfellowmanship	Nelsonpelterskimper	Goodfellowmanship	(256) 237-4444	
					Roberta Singleto	n	Roberta	Sngleton	(256) 435-5588	
					Susanna Primerh	olt	Susanna	Primerholt	(256) 435-6677	
					Xazavier Victriliur	π	Xazavier	Victrilium	(256) 885-2211	
									Close	

- The **Paid Amount** will display the dollar amount paid out entered on the **claims** tab.
- The **Reserve Amount** will display the dollar amount set up as a reserve entered on the **claims** tab.
- The Issuing Carrier and Adjustor's Name display.
- There is no Remove icon for claims in the summary view. An open claim will need to be aborted to remove it from the summary view.

#### Notes



# Delivering the Claim Form from Nexsure

The claim form may be delivered from Nexsure via e-mail or fax. Entering required information and attaching the claim as follows queues the form for delivery and tracking from Nexsure.

Steps for Delivery:

Locate the appropriate client through SEARCH and click the DELIVERY link on the Client menu. The defaults configured in the [Show] filters option will determine what is displayed in the summary view when clicking the DELIVERY link. The Nexsure defaults are as follows:

Nexsure Search Filter Defaults	Default
Title	None
Regarding	None
Created By	User logged on
Sent By	None
Date Created From	Current Date
Date Created To	None
Client Name	Client
Via	Both Email and Fax
Date Delivered From	None
Date Delivered To	None
Sent To	None
Status	Not Successful

Nexsure Sort Filter Defaults	Default
Sort Field 1	Date Created
Sort Order 1	Descending
Sort Field 2	None
Sort Order 2	None
Files per Page	50

nexsure						Home   Help   Setup   Logout
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Note: If the Nexsure default is changed by clicking the Save Filter Settings check box and clicking Search, the new default settings will be present each time the page is accessed until a new setting is added or the check box is removed and Search is selected. Use Date Variable icons to set a continuous date range to be used with Save Filter Settings. Enter + or - and the number of days up to three digits. The date will then be + (after) or - (before) the current date.

- Click the [Add New] link to start the delivery process.
- Since the claim can be sent from Nexsure as an e-mail or fax make sure to click the appropriate tab. The e-mail tab will default but if faxing the claim make sure to click the fax tab.
- Complete the required e-mail or fax information on the left side of the screen.
- The right side of the delivery screen is used to attach forms and documents to the e-mail or fax. Click the Add link in the gray claims line.
- The Attach Claim pop-up window and **claims** tab is displayed.
- Click the appropriate claim option.

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- Click the **Attach** button. Click **Close** to abort.
- The attachment(s) will display, with the total number of items attached, on the right side of the delivery screen.
- Click the **send** link to send the e-mail or fax.
- The Delivery Summary View Screen is displayed with the stage of the e-mail or fax. The stage will update as the screen is refreshed.
- If the e-mail is unsuccessful, the sender will receive an unsuccessful e-mail message in their mailbox. If the fax is unsuccessful, the sender will receive a Delivery Failure Notification in their mailbox.
- Each delivery will have its own **Details** icon. To view the details, perform the following steps:
  - Click the **Details** icon to display the e-mail or fax information, the forms included, and the total number of attachments.
  - Click the viewer tab and each form included in the e-mail or fax is displayed with a Magnifying Glass (1) icon.
  - Click the Magnifying Glass (Q) icon to view the information contained in the form that was sent.

**Note:** The **Delivery Summary View** screen can be accessed from the **Home** menu, or the **Client** menu. The **Home** menu will display a summary of all deliveries sent by the user. The client level will only display deliveries for the specified client.

#### Notes

# Closing and Reopening the Claim

A claim should remain open until notified by the carrier it has been closed. Claims are unusual in the fact that they alone, once posted, can still be tracked on the **Home** and **Client** menus depending on how the **[Show]** filter defaults are set up. A closed claim can be reopened if needed.

### HOW to Close a Claim

- The open claim can be accessed from the **CLAIMS** link on either the **Home** menu or **Client** menu.
- Click the CLAIMS link on the Home menu. All claims, which fall within the search criteria, will appear in a summary view. The client is displayed with at least two Details ricons, if there is more than one claim for the client each claim will have its own Details ricon.
- Clicking the **Details** icon to the left of the claim to be posted displays the claims tab of the open claim.

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- Click the **Post Claim** link in the navigation toolbar under the header to post.
- To populate the Date Closed with the current date, click OK in the pop-up window and to enter a date other than the current date, click Cancel. Clicking Cancel, aborts the posting of the claim to allow the closed date to be entered manually. Enter the date in the Date Closed box and then click the Post Claim link. The claim will post with the date entered and the Date Posted located just below the Memo box will populate with the current date. The posted date cannot be modified by the user. This box is used to identify when the claim was posted.
- Once the claim is posted the information in the claims tab will be locked, no further changes can be made, nor can the claim be aborted.

Note: The claim's Action can be updated at any time on both open and closed claims.



### HOW to Reopen a Closed Claim

Once a claim is closed the information in the **claims** tab will be locked, no further changes can be made, nor can the claim be aborted. When the claim is posted, the **Reopen Claim** link will become active.

- The closed claim can be accessed from the CLAIMS link on either the Home menu or Client menu depending on how the [Show] filter defaults are set.
- Click the CLAIMS link on the Home menu. All claims, which fall within the search criteria, will appear in a summary view. If the claim is not displayed, click the [Show] filter, change the search criteria and click the Search button to initiate a new search.
- Each client will display with at least two Details icons, if there is more than one claim each claim will have its own Details of icon.
- Click the **Details** icon to the left of the closed claim that needs to be reopened.

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The **claims** tab of the closed claim is displayed.

- Click the **Reopen Claim** link in the navigation toolbar under the header to reopen the claim.
- The claim will remain open until closed.
- Both the Date Closed and Date Posted boxes are cleared when the claim is re-opened. So, if re-opening the claim to modify the screen, make sure to write down the closed date so it can be re-entered when the claim is closed again. Keep in mind that the Date Posted box will change to the current date when the Post Claim link is clicked.

**Note:** The information on the **claims** tab can be updated if the claim is reopened, remember to click the **Save Changes** link when updating the **claims** tab.

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### Notes