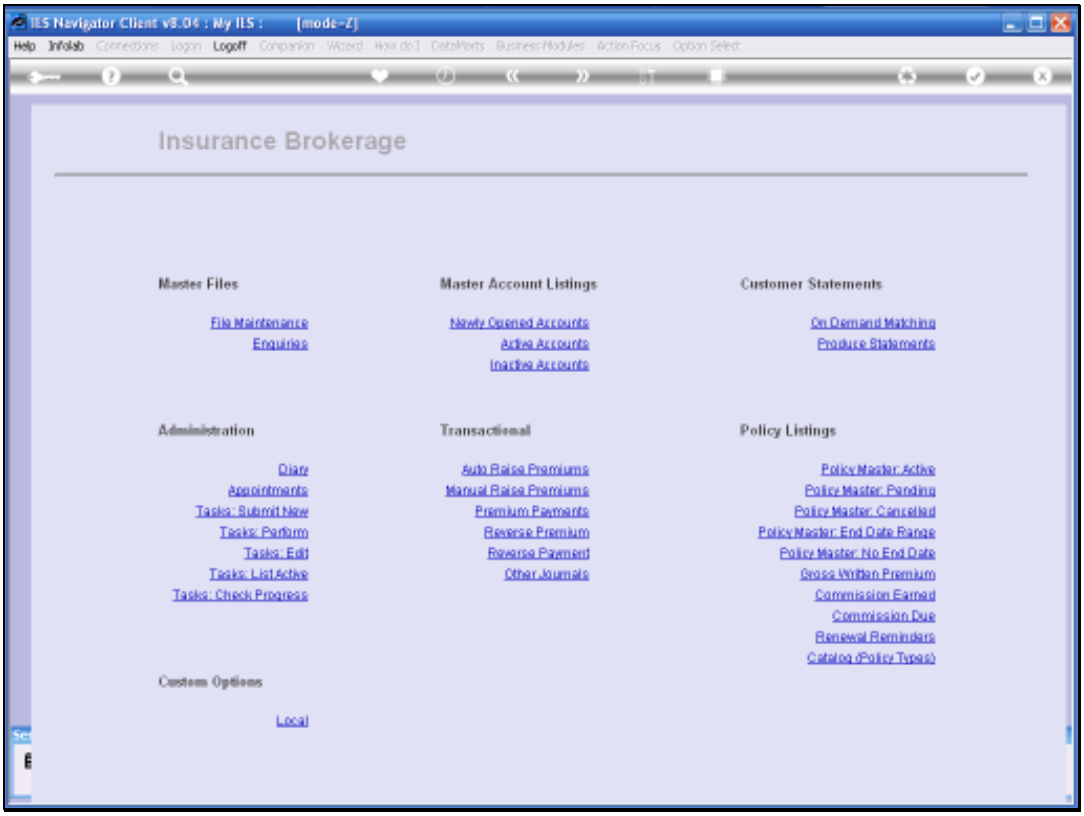
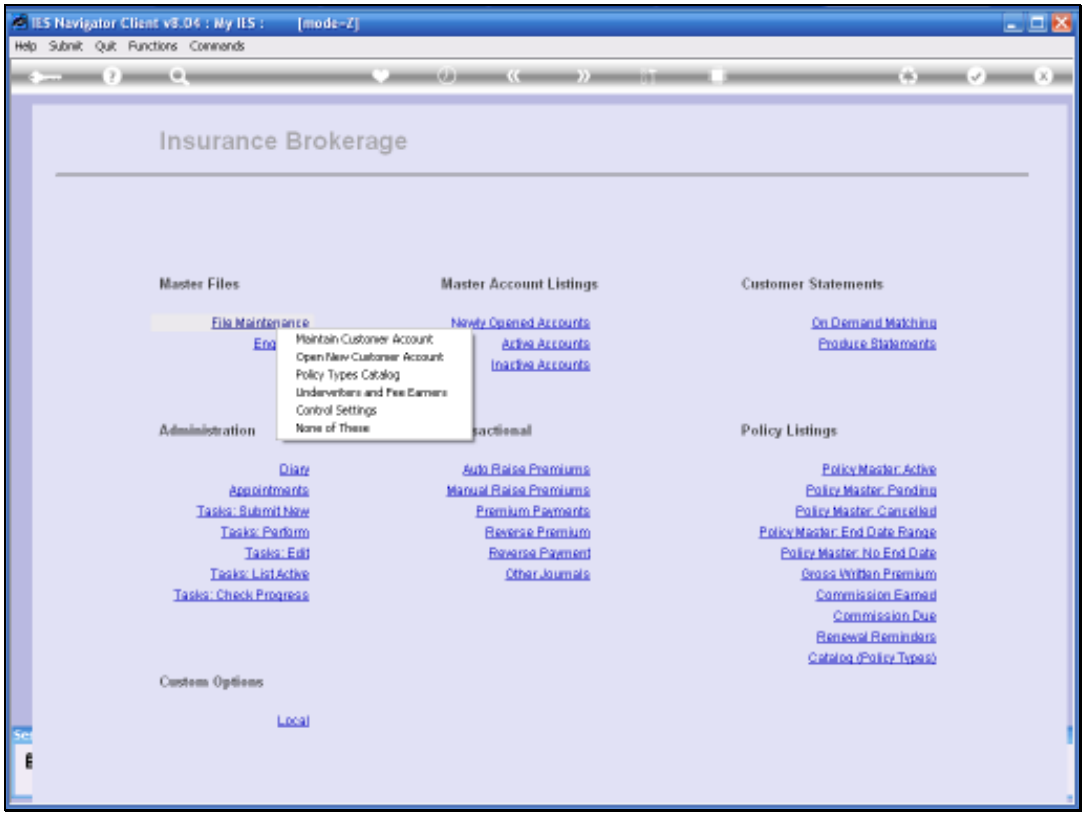
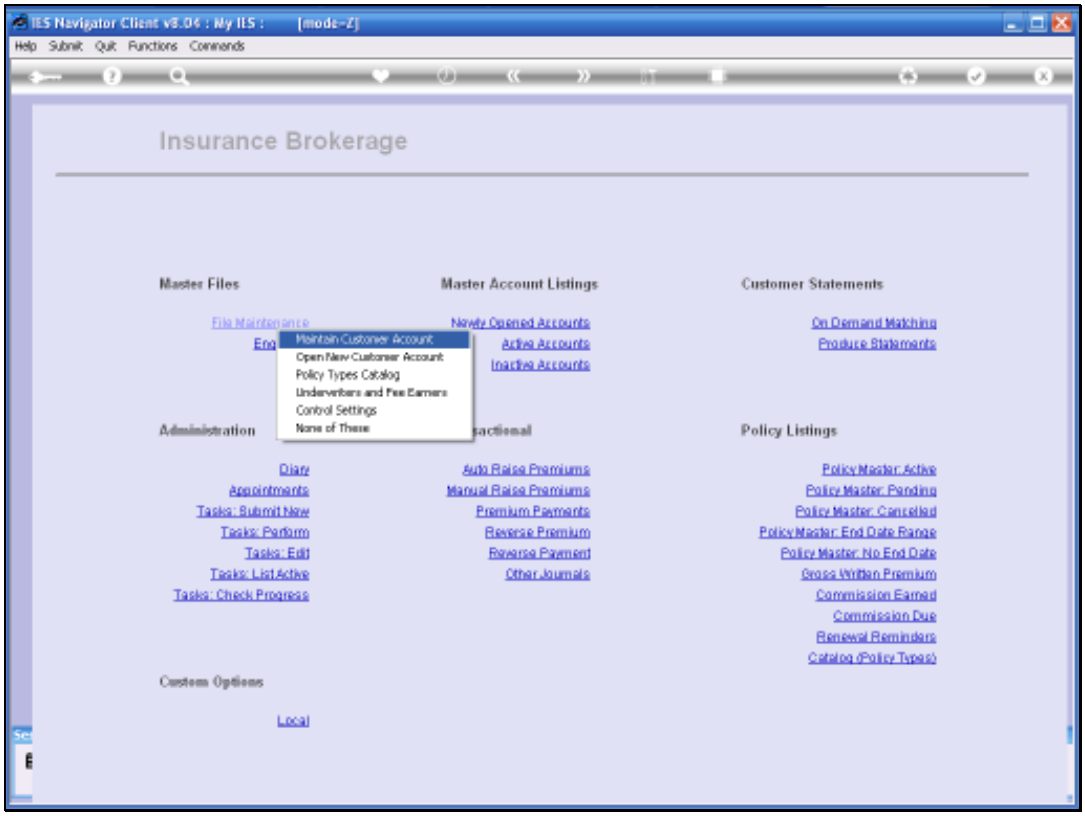


Slide 1

In this session we are going to look at an example of how we deal with Incidents and Claims.

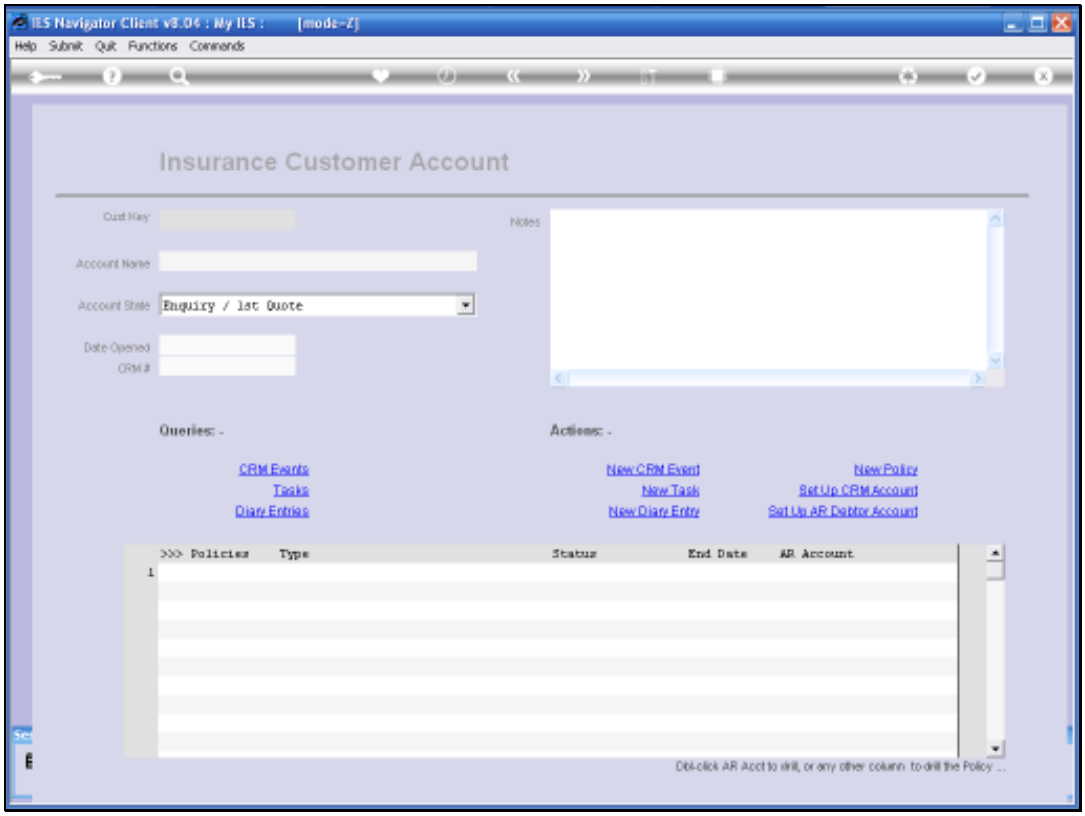

IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Brokerage
Master Files
File Maintenance
Maintain Customer Account
Open New Customer Account
Policy Types Catalog
Underwriters and Fee Earners
Control Settings
None of These
Master Account Listings
Newly Opened Accounts
Active Accounts
Inactive Accounts
Customer Statements
On Demand Matching
Produce Statements
Administration
Diary
Appointments
Tasks: Submit New
Tasks: Perform
Tasks: Edit
Tasks: List Active
Tasks: Check Progress
Auto Raise Premiums
Manual Raise Premiums
Premium Payments
Reverse Premium
Reverse Payment
Other Journals
Policy Listings
Policy Master: Active
Policy Master: Pending
Policy Master: Cancelled
Policy Master: End Date Range
Policy Master: No End Date
Gross Written Premium
Commission Earned
Commission Due
Renewal Reminders
Catalog (Policy Types)
Custom Options
Local

Slide 2

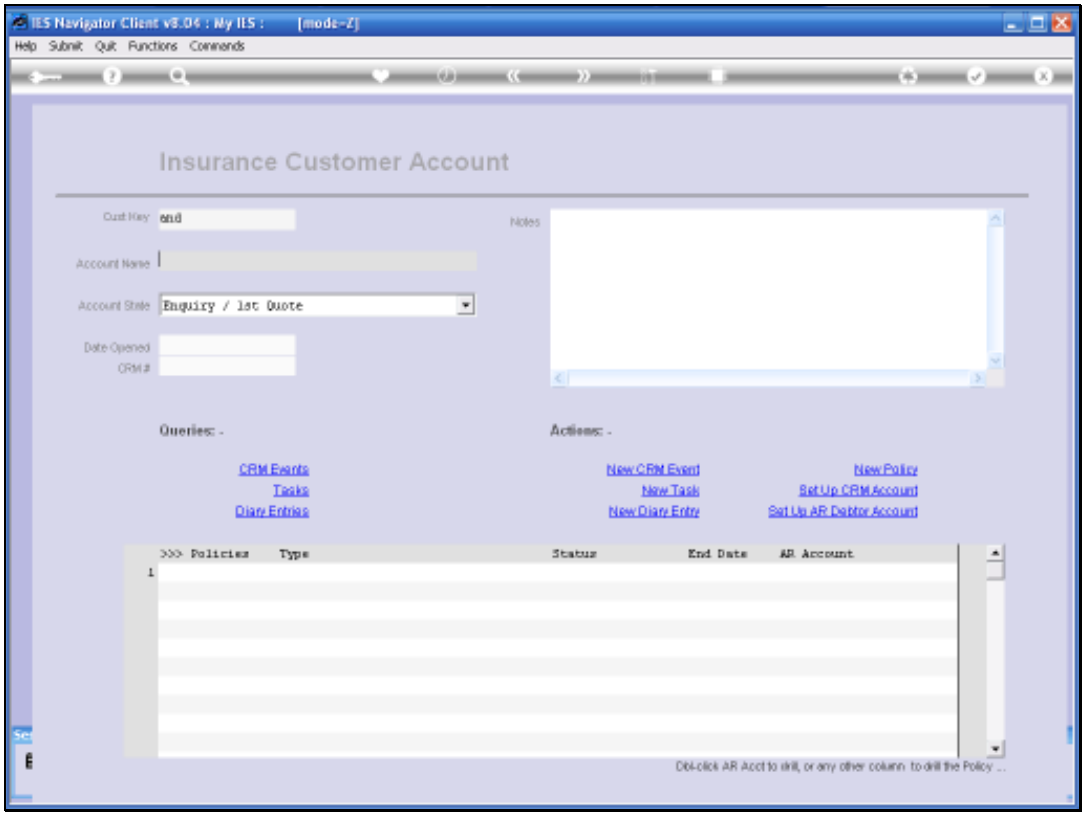


Slide 3

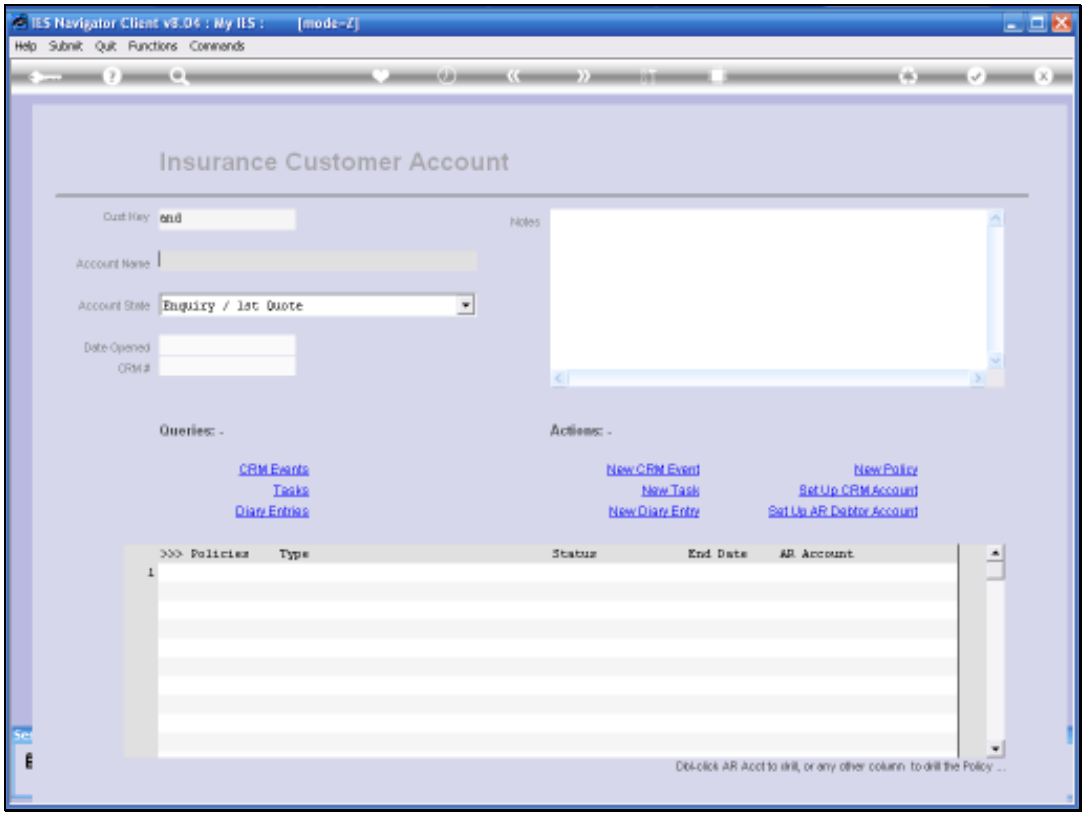
When an Incident is Reported, we Open the Customer Account and then the Policy on which this Incident has impact.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key
Account Name
Account State
Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies
Type
Status
End Date
AR Account
1
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

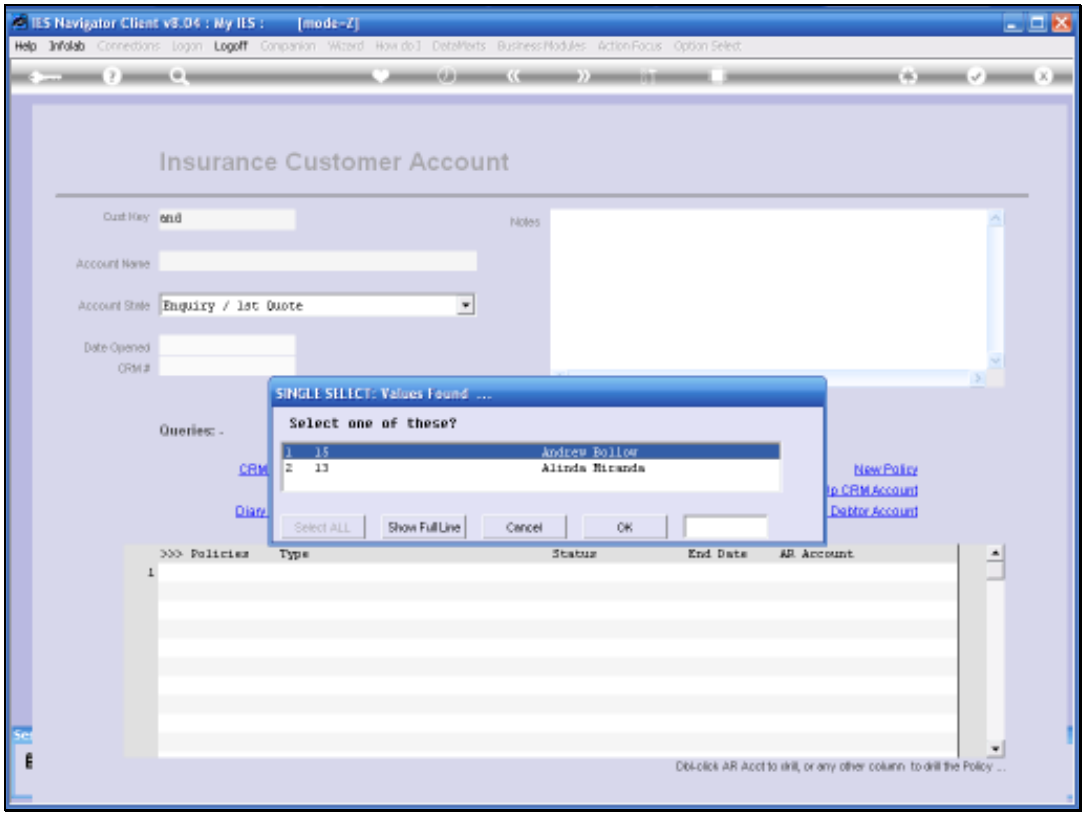
Slide 4


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key end
Account Name
Account State Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

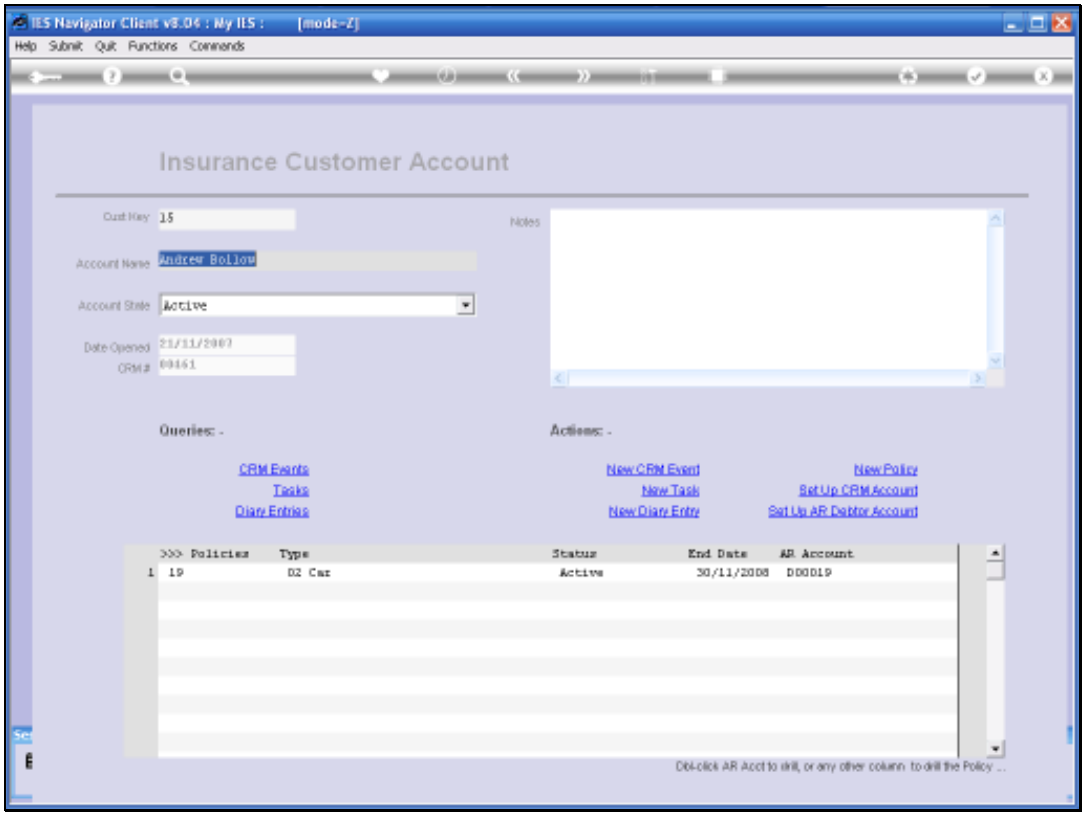
Slide 5


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key end
Account Name
Account State Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

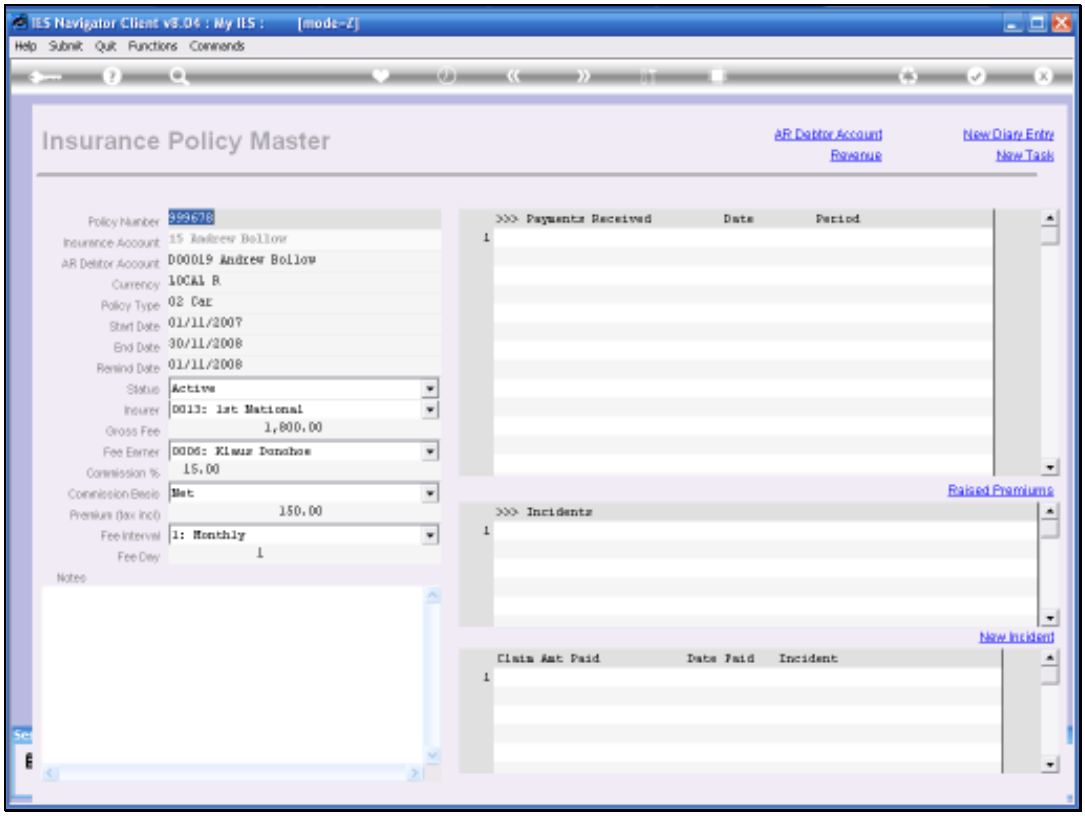
Slide 6


IES Navigator Client v8.04 : My IES : [mode=Z]
Help InfoLab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules ActionFocus Option Select
Insurance Customer Account
Cust Key end
Account Name
Account State Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
SINGLE SELECT: Values Found ...
Select one of these?
1 15 Andrew Bollar
2 13 Alinda Miranda
Select ALL
Show Full Line
Cancel
OK
New Policy
to CRM Account
Debtor Account
>>> Policies Type Status End Date AR Account
1
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

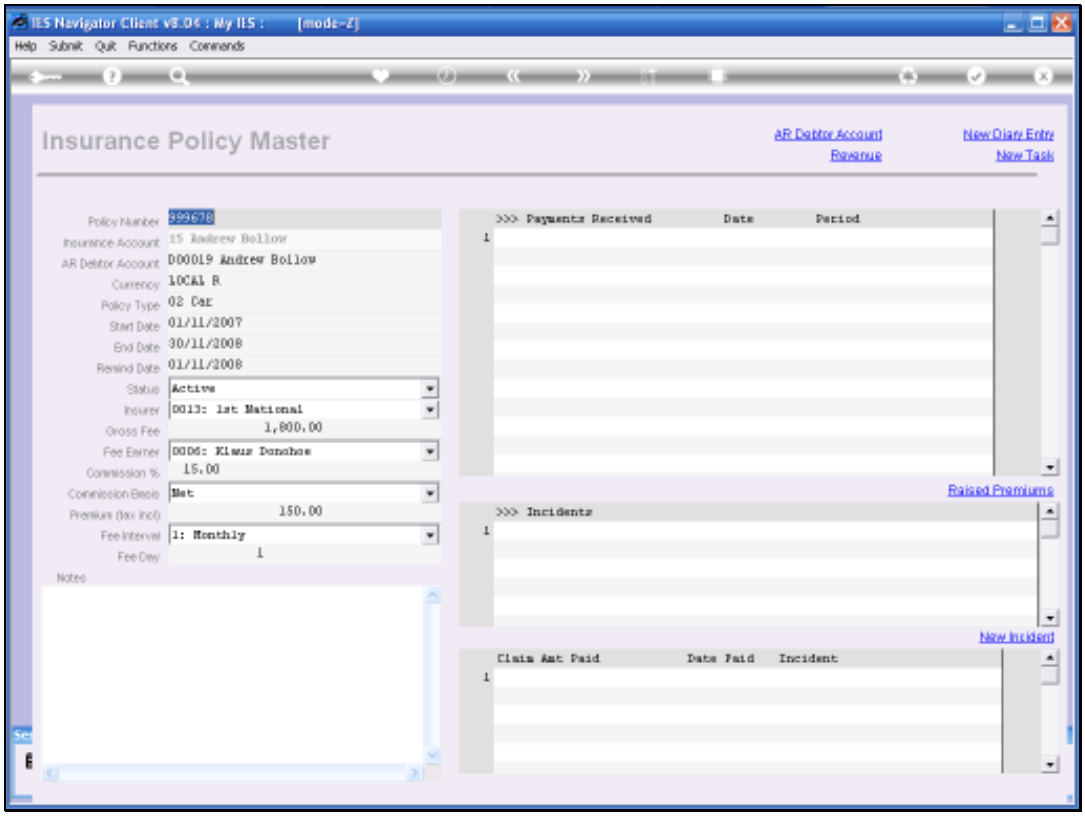
Slide 7


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 15
Account Name Andrew Bollow
Account State Active
Date Opened 21/11/2007
CRM # 00461
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 19 02 Car Active 30/11/2008 D00019
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 8

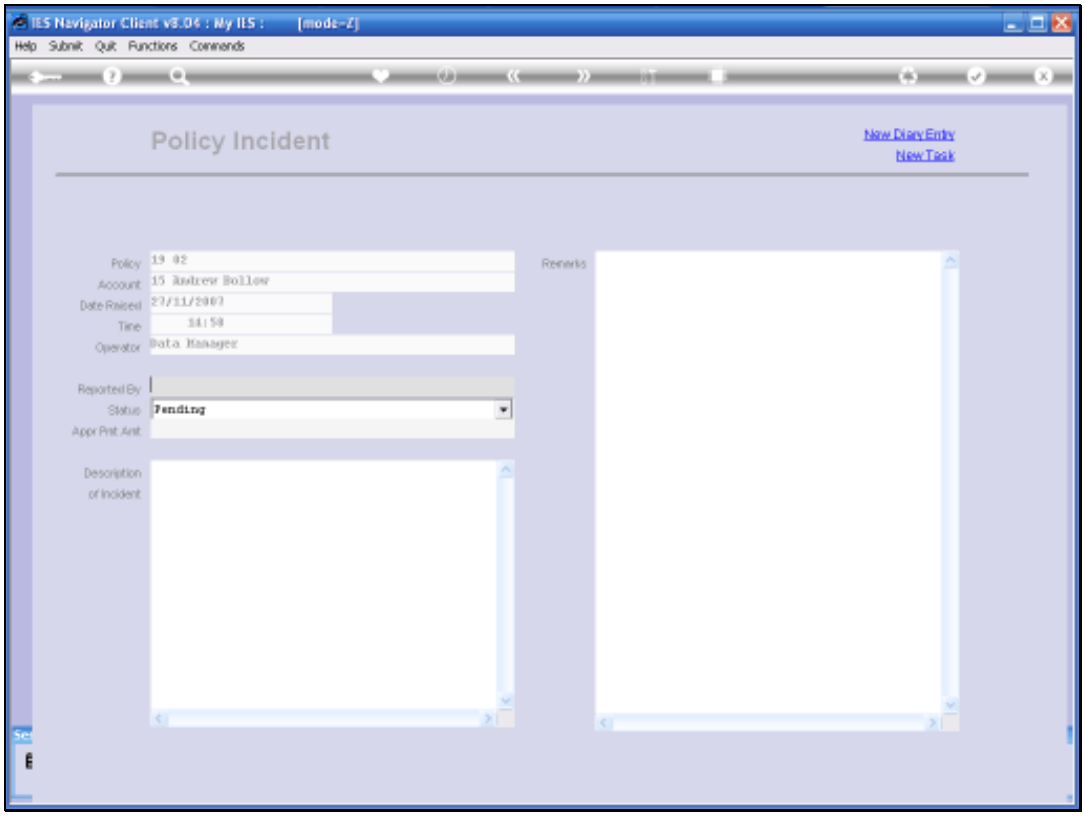

IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
New Incident
Claim Amt Paid Date Paid Incident

Slide 9

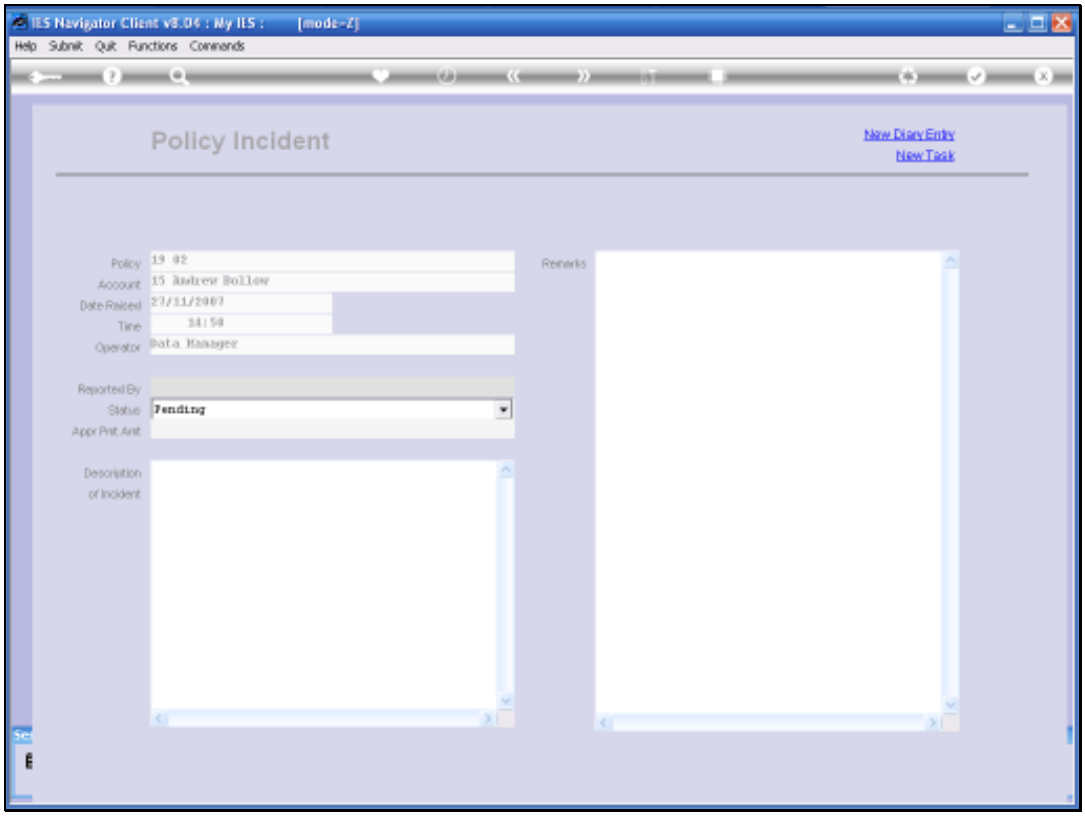


Slide 10

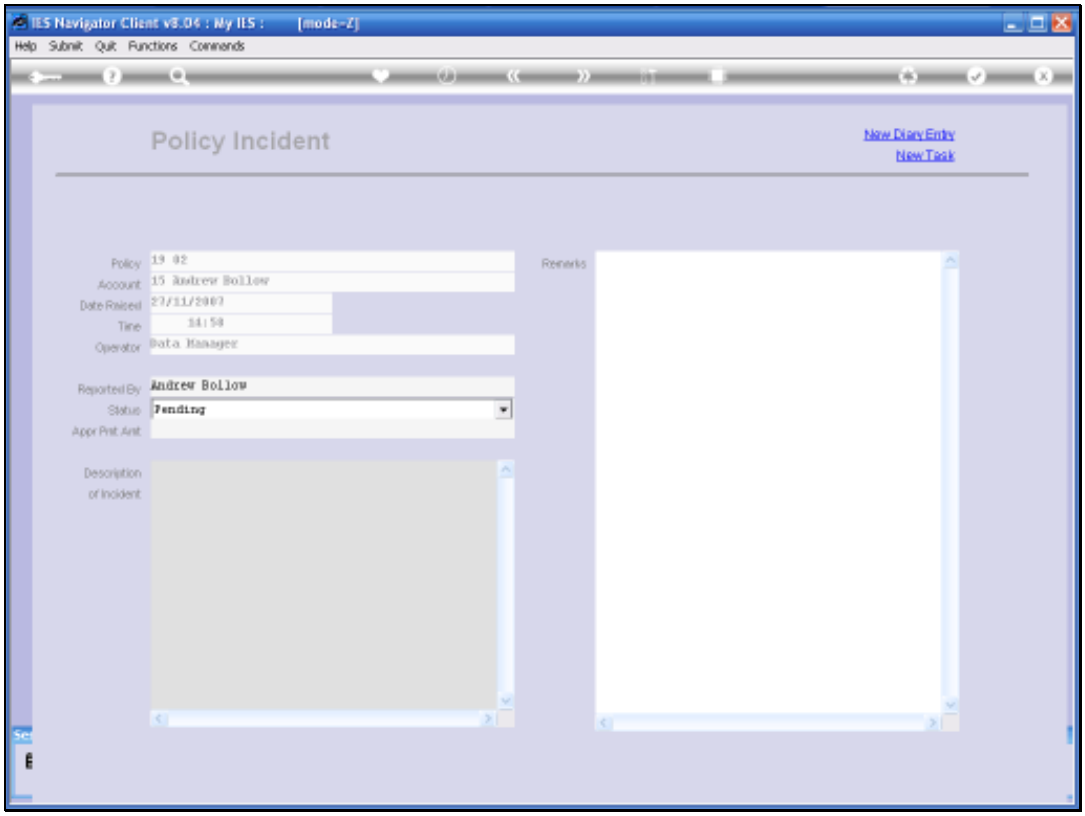
We can use the New Incident Function to Record an Incident Initially.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By
Status Pending
Appr Pnt Amt
Description of Incident
Remarks

Slide 11

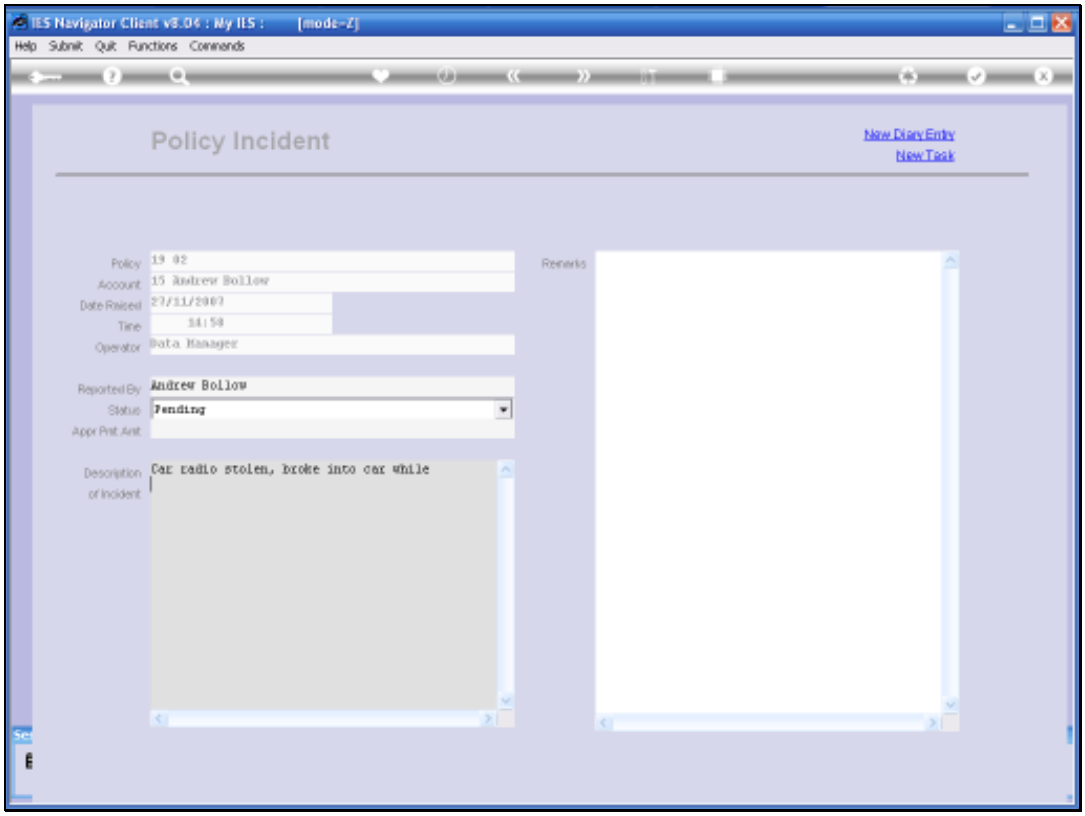

IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By
Status Pending
Appr Pnt Amt
Description of Incident
Remarks

Slide 12

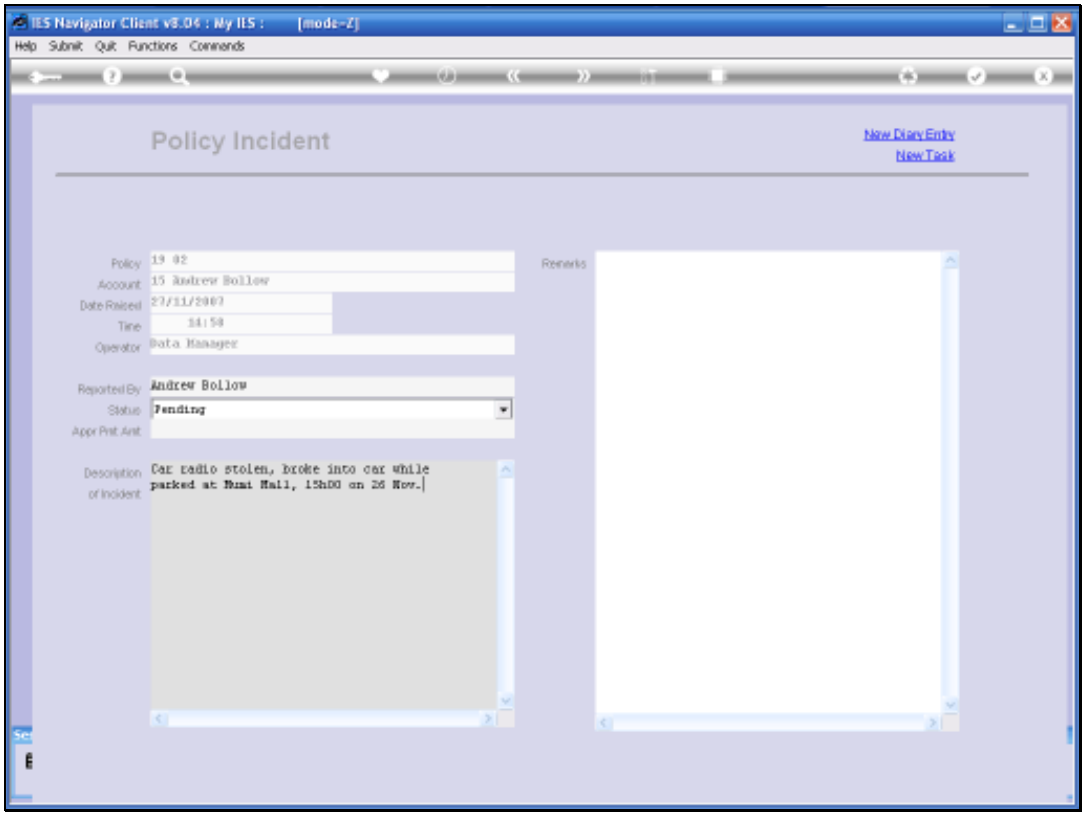


Slide 13

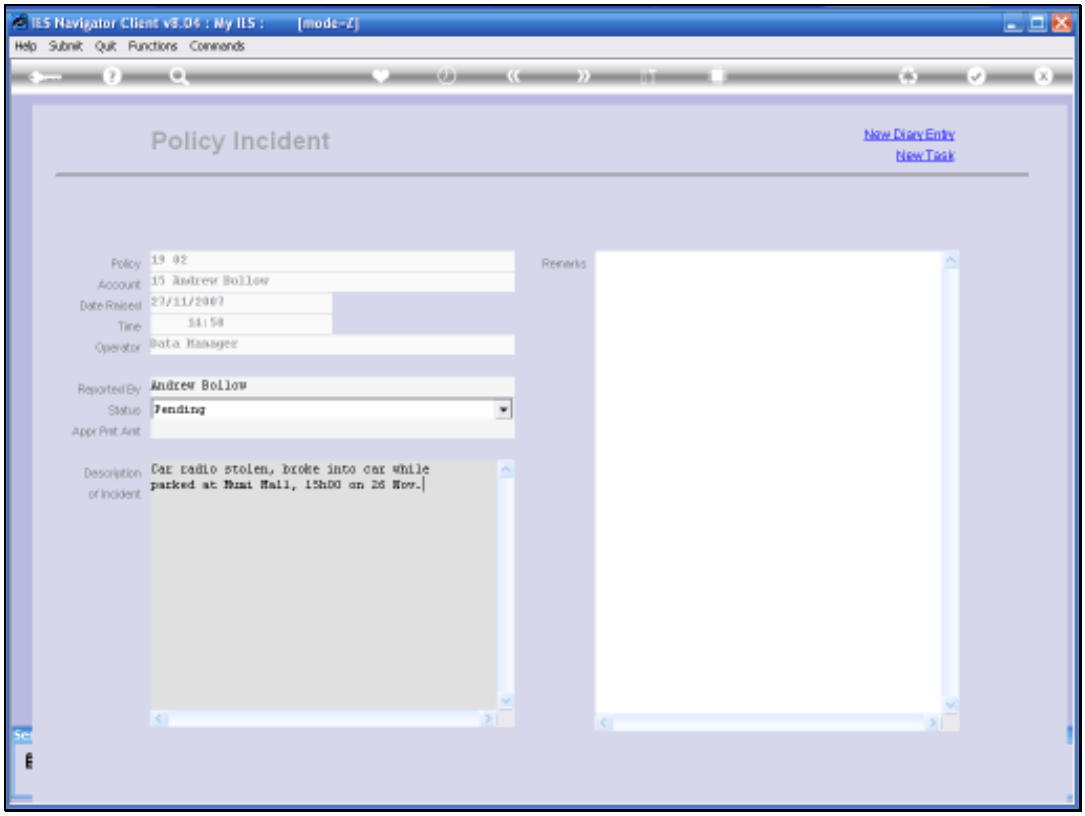
We make a note of who Reported the Incident and then the Details that we have about the incident.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pnt Amt
Description of Incident Car radio stolen, broke into car while
Remarks

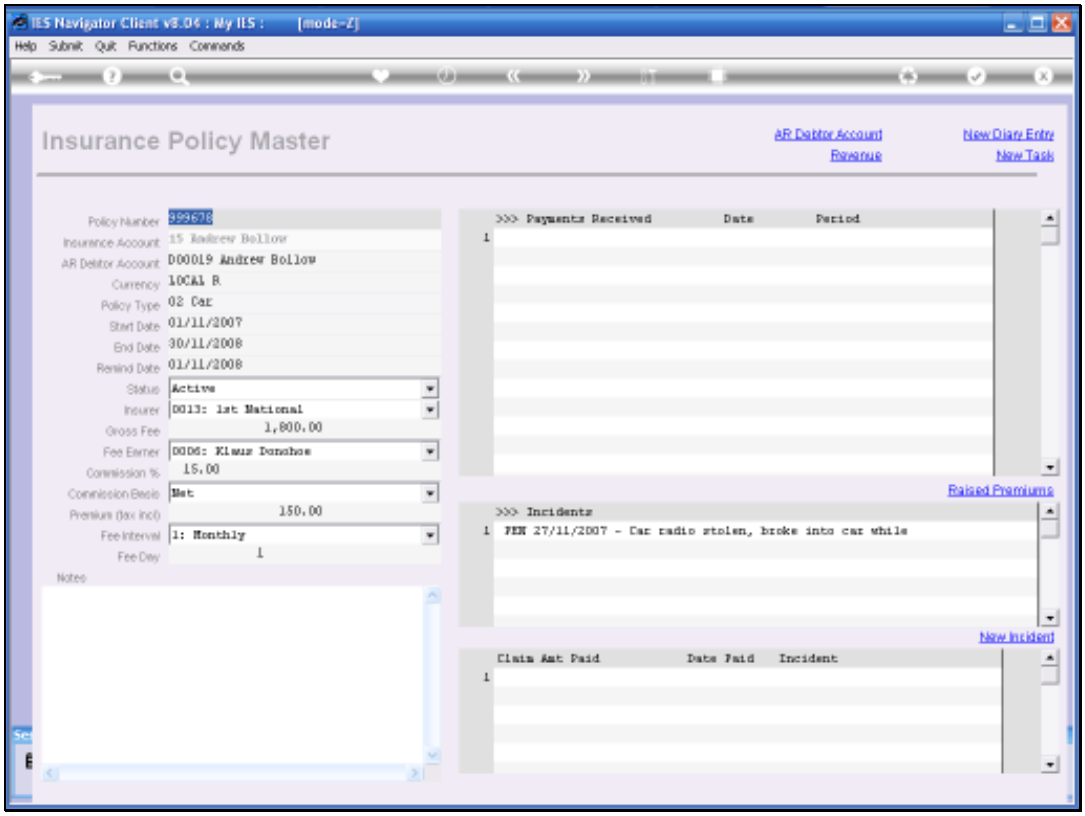
Slide 14


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:50
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt
Description of Incident
Car radio stolen, broke into car while parked at Nuni Mall, 15h00 on 26 Nov.
Remarks

Slide 15

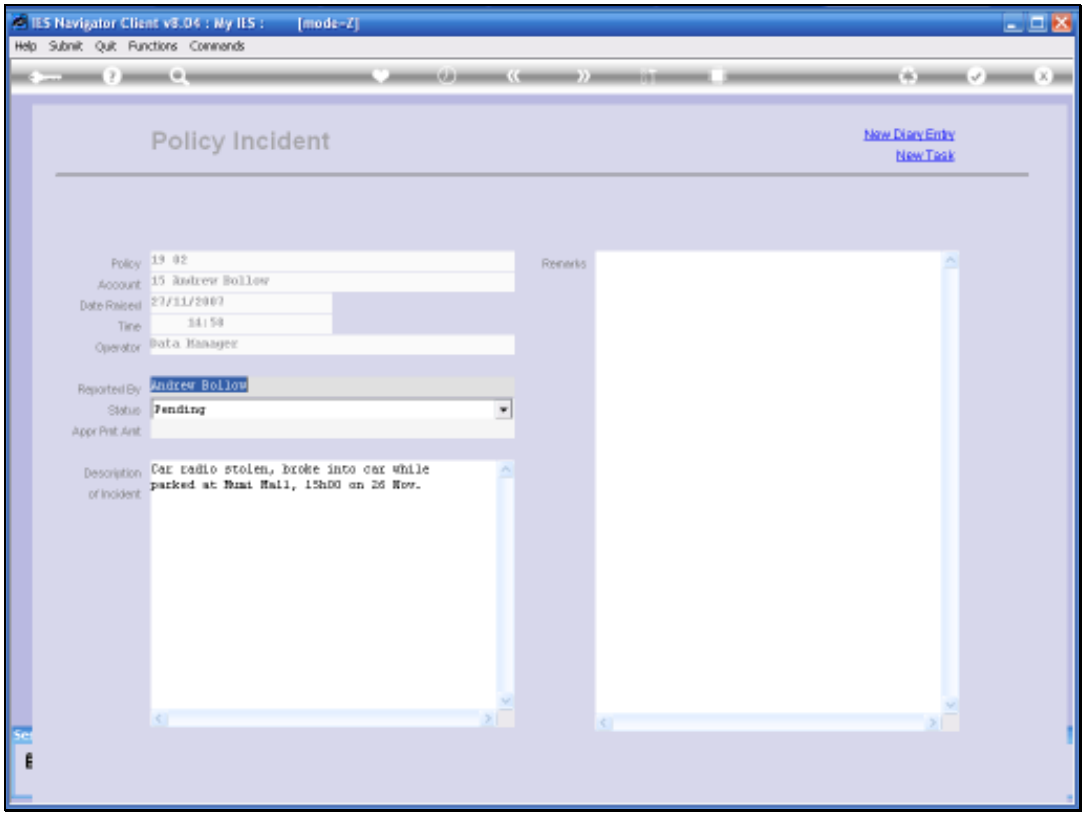

IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:50
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt
Description of Incident
Car radio stolen, broke into car while parked at Numi Mall, 15h00 on 26 Nov.
Remarks

Slide 16

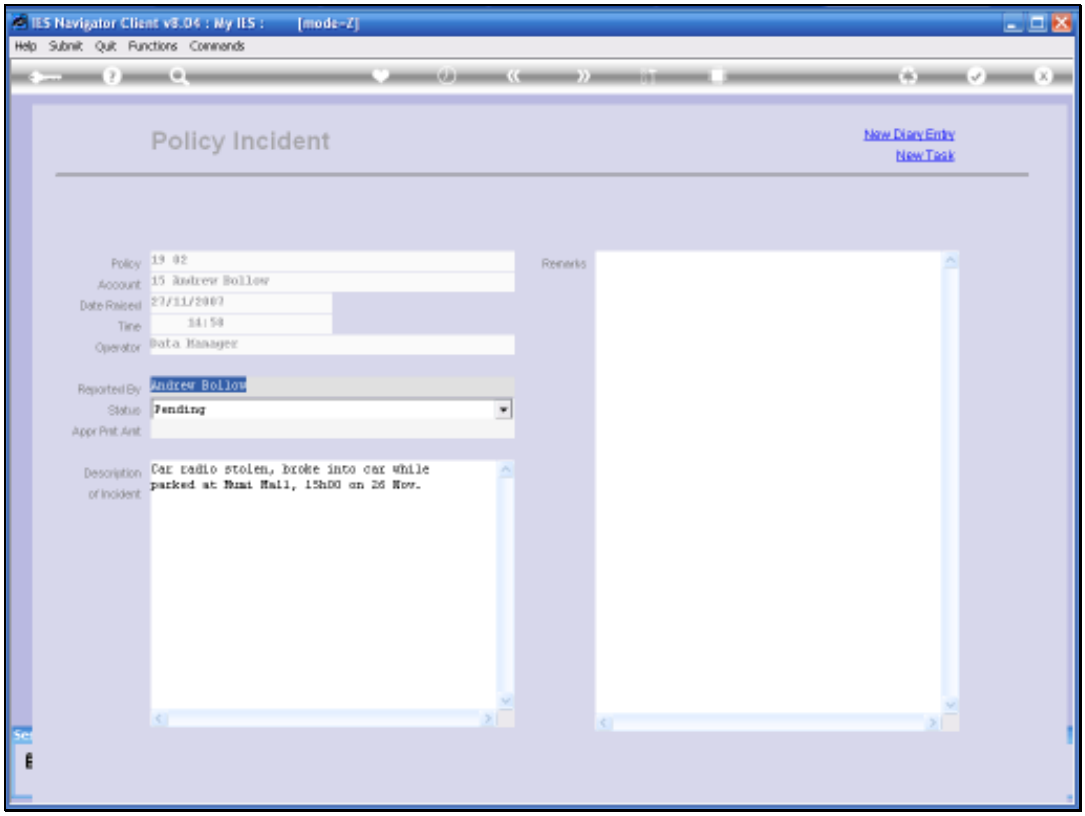


Slide 17

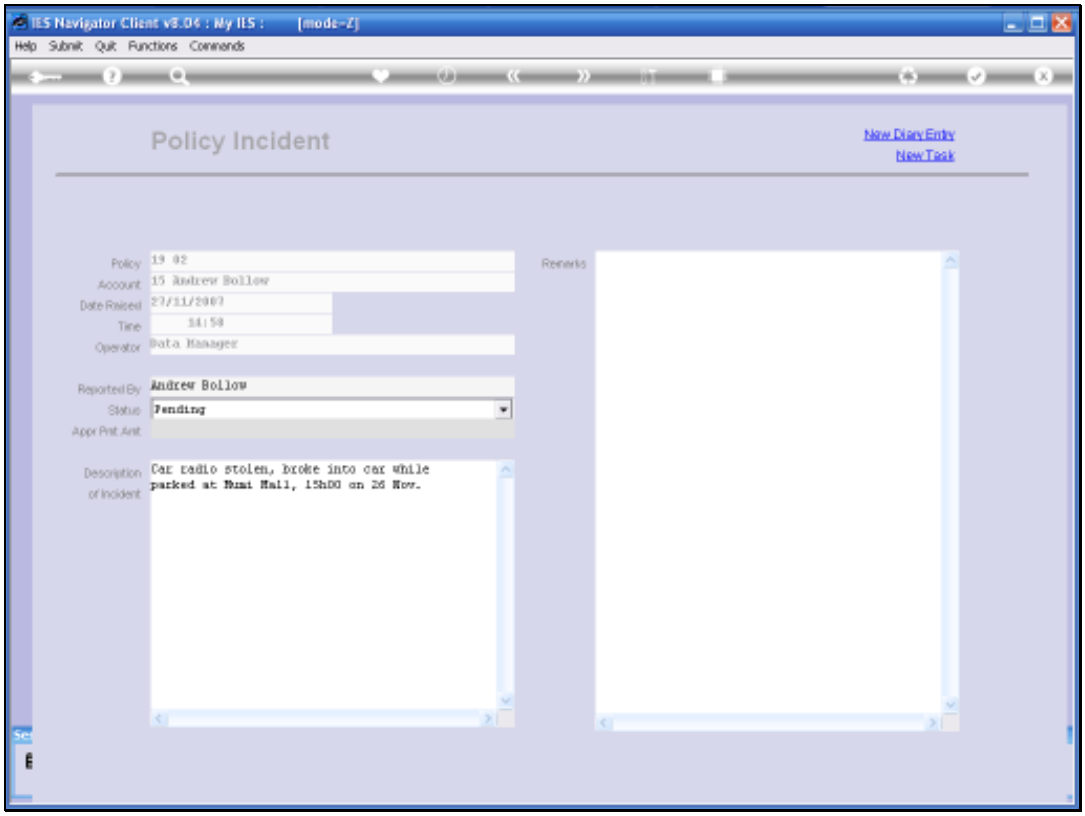
The Incident is initially Pending and as we can see it is listed as Pending and we can Re-visit this Incident as it develops, as many times as we have to and we will only make it Final once a Claim is Paid or Not Paid.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:50
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pnt Amt
Description of Incident Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

Slide 18


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:50
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pnt Amt
Description of Incident Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

Slide 19

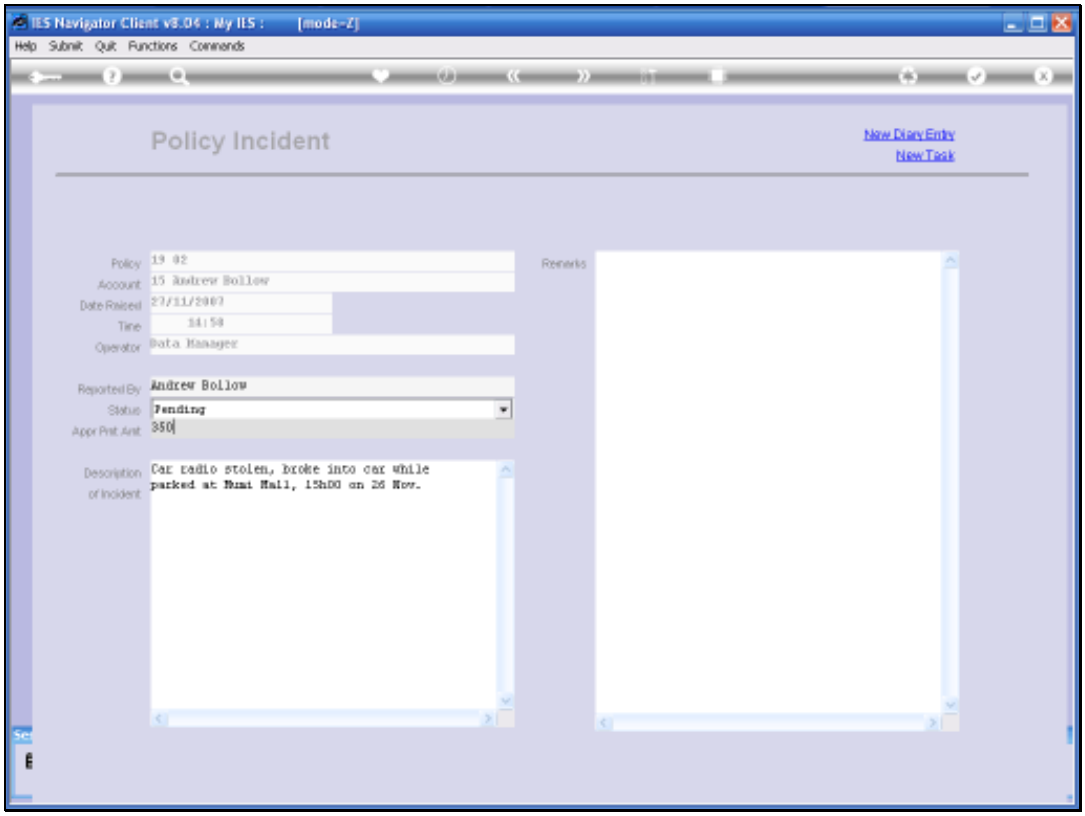


Slide 20

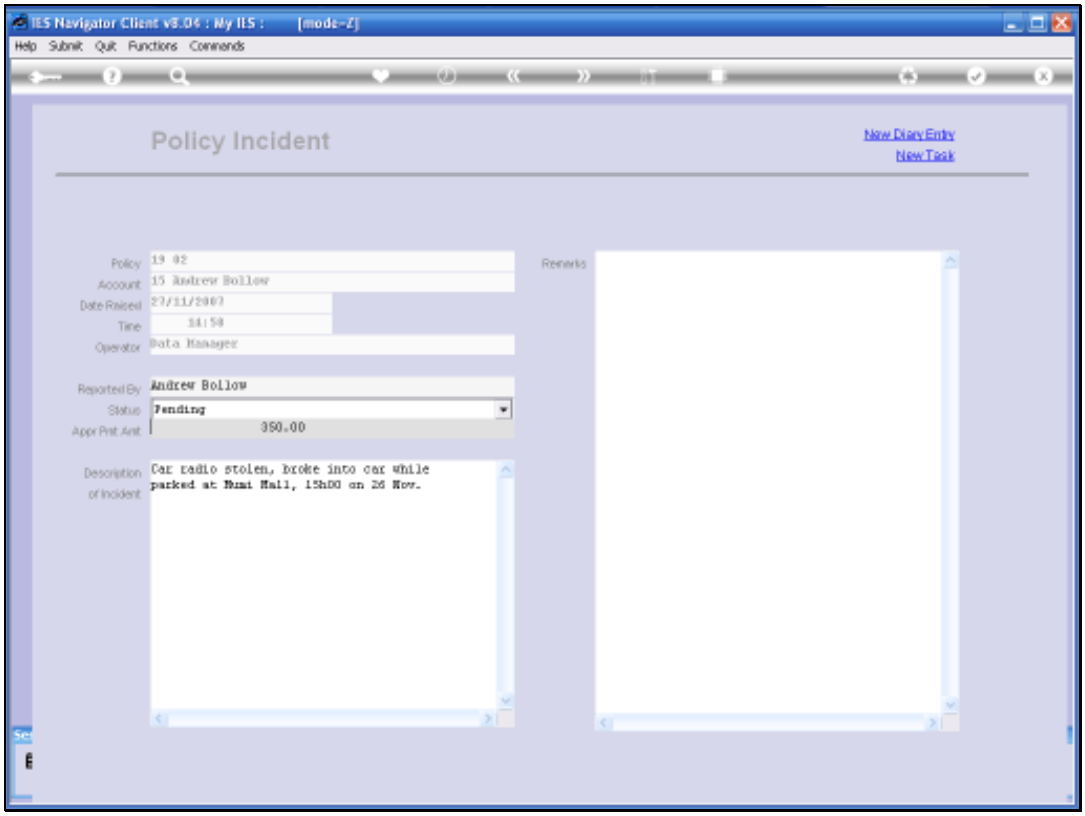
In this example I am now going to Record an Amount of $350 that is approved in Settlement of this Claim.

The actual Payment is not done here. I am only Recording the fact.

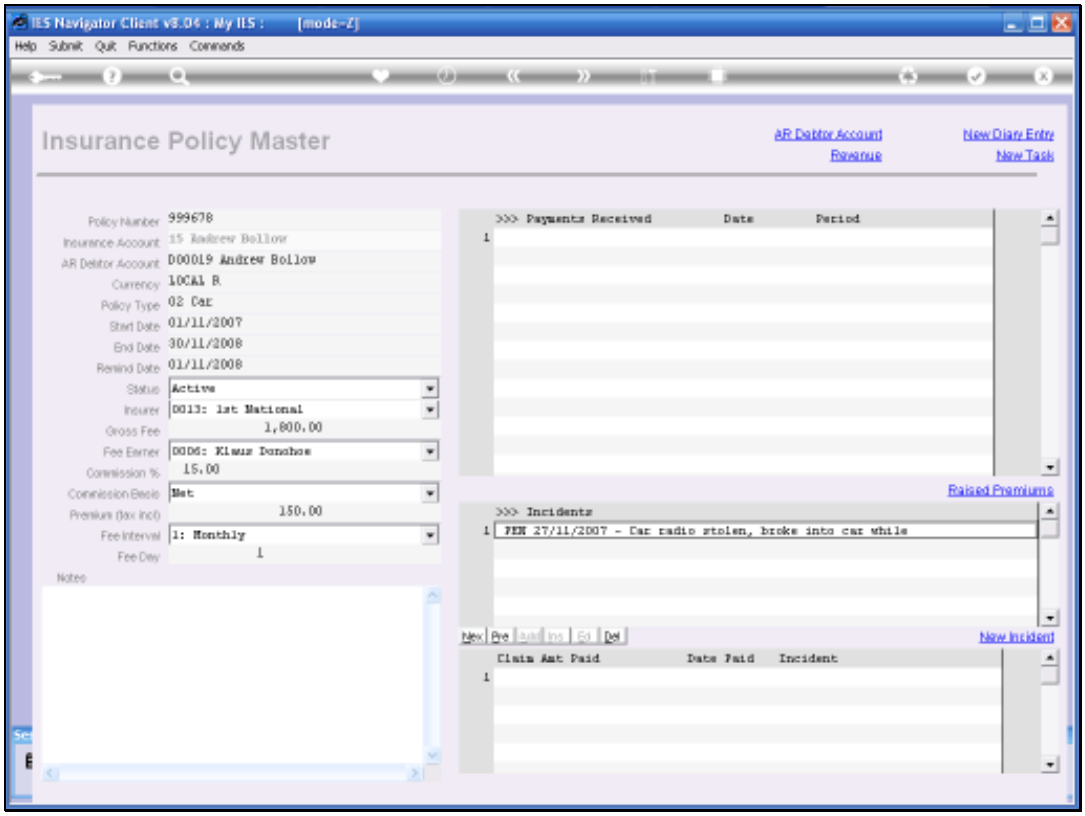
The Payment will be done by Normal Standard Journals and any other Provisions or Amounts in connection with this incident will also be dealt with by Normal Standard Journals.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt 350
Description of Incident Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

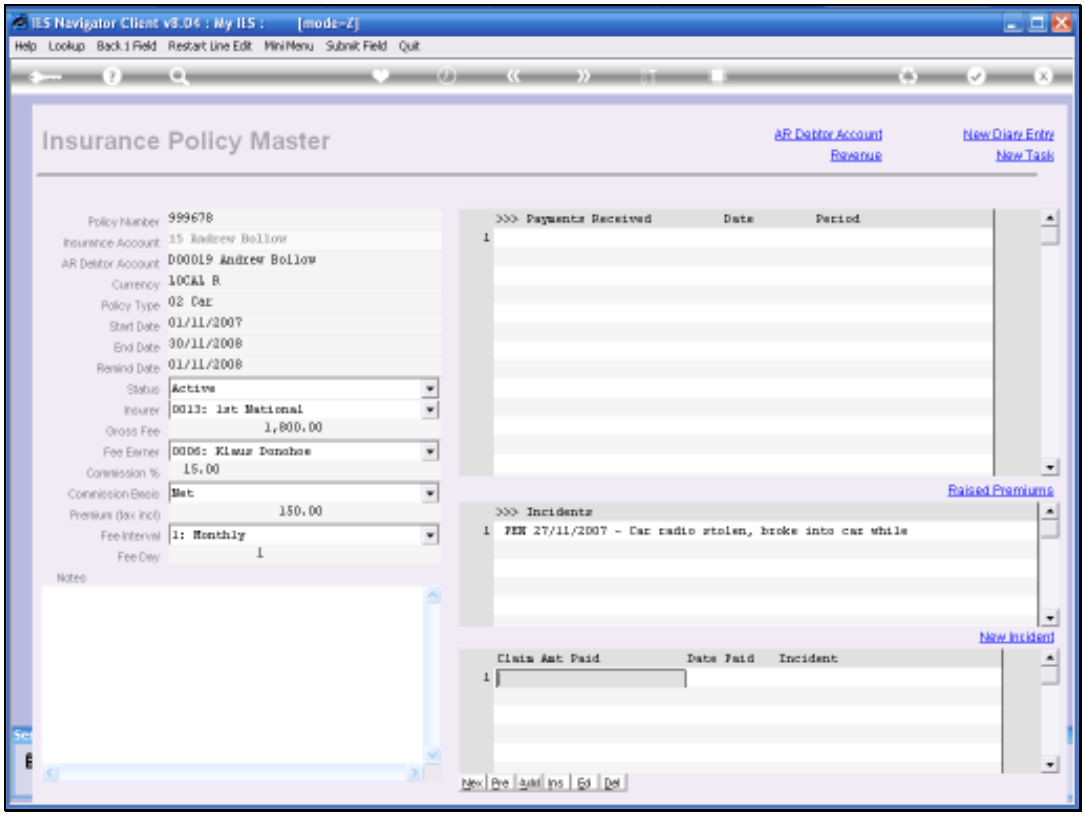
Slide 21


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt 350.00
Description of Incident Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

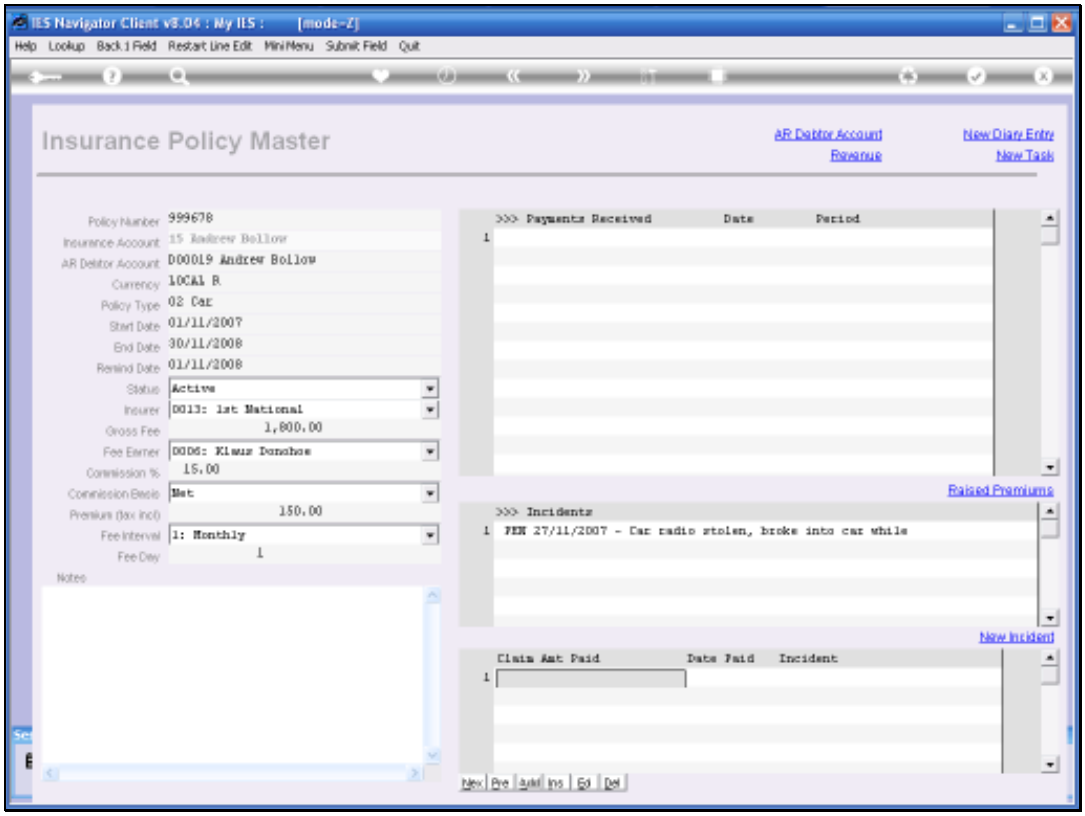
Slide 22


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident

Slide 23


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Lookup Back 1 Field Restart Line Edit MiniMenu Submit Field Quit
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident
New Pre Add Ins Ed Del

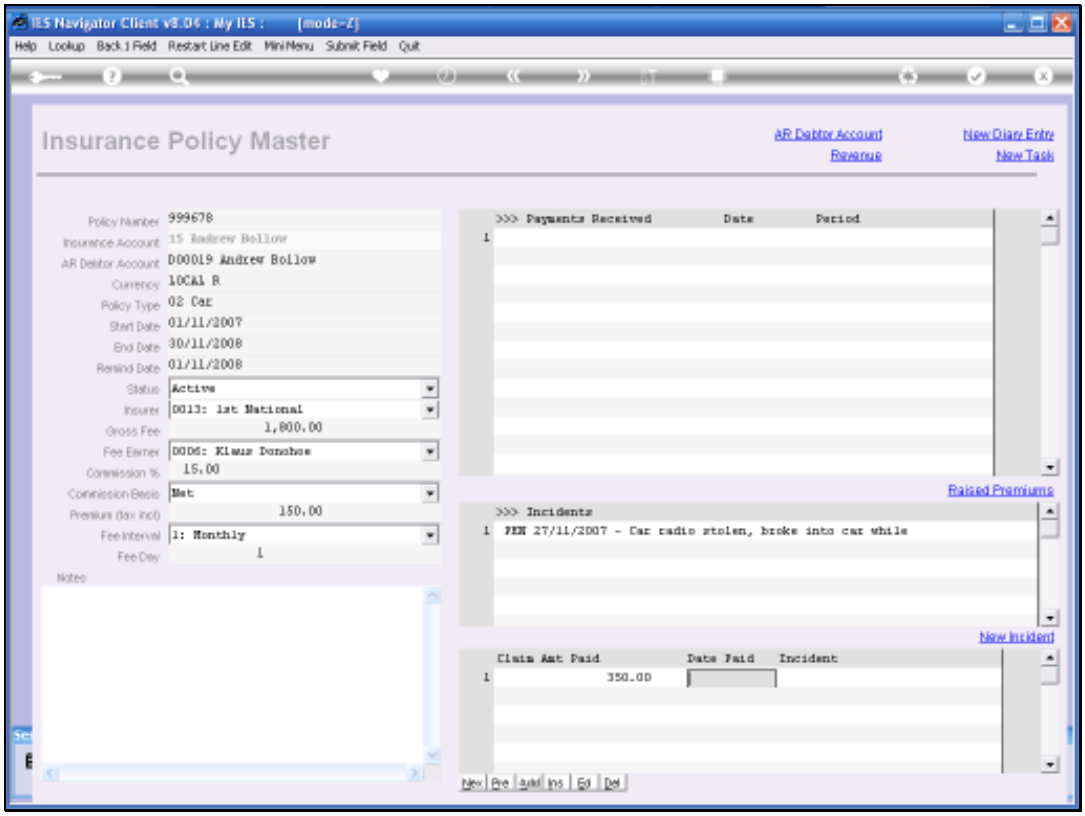
Slide 24



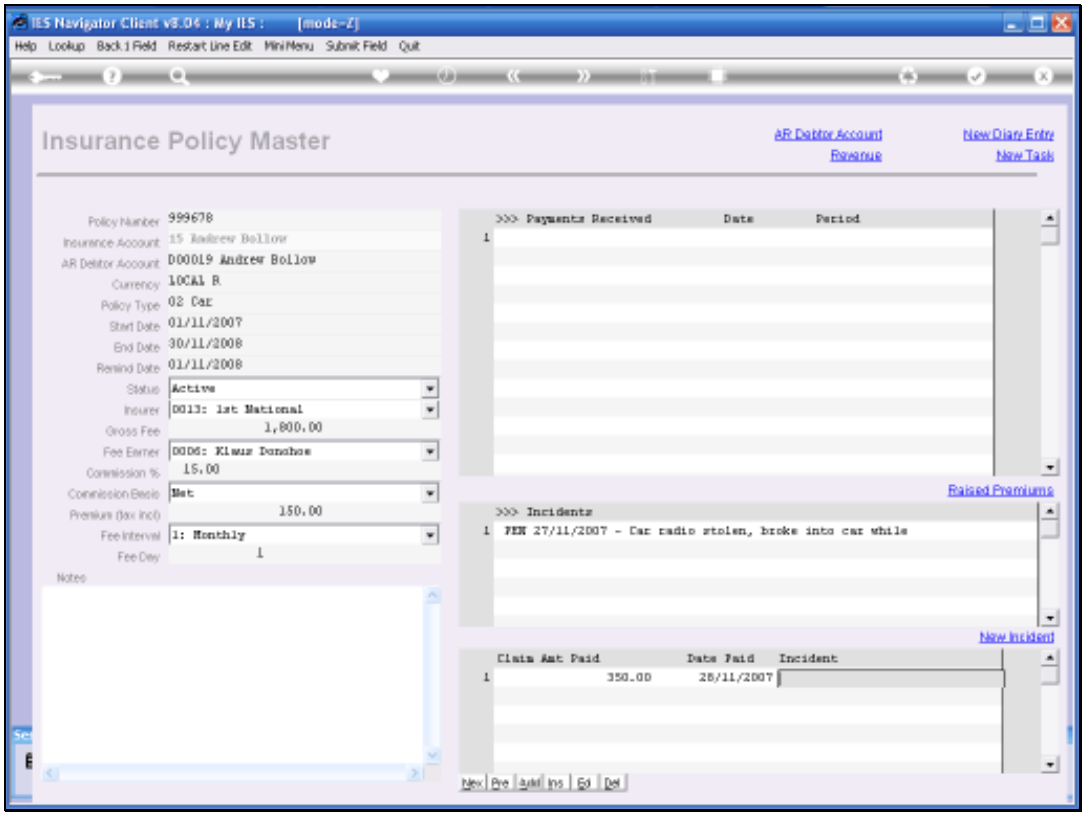
Slide 25

When a Claim is Paid, as in this example, then that will also be Recorded as a Claim Paid with the Date and Reference to the Incident.

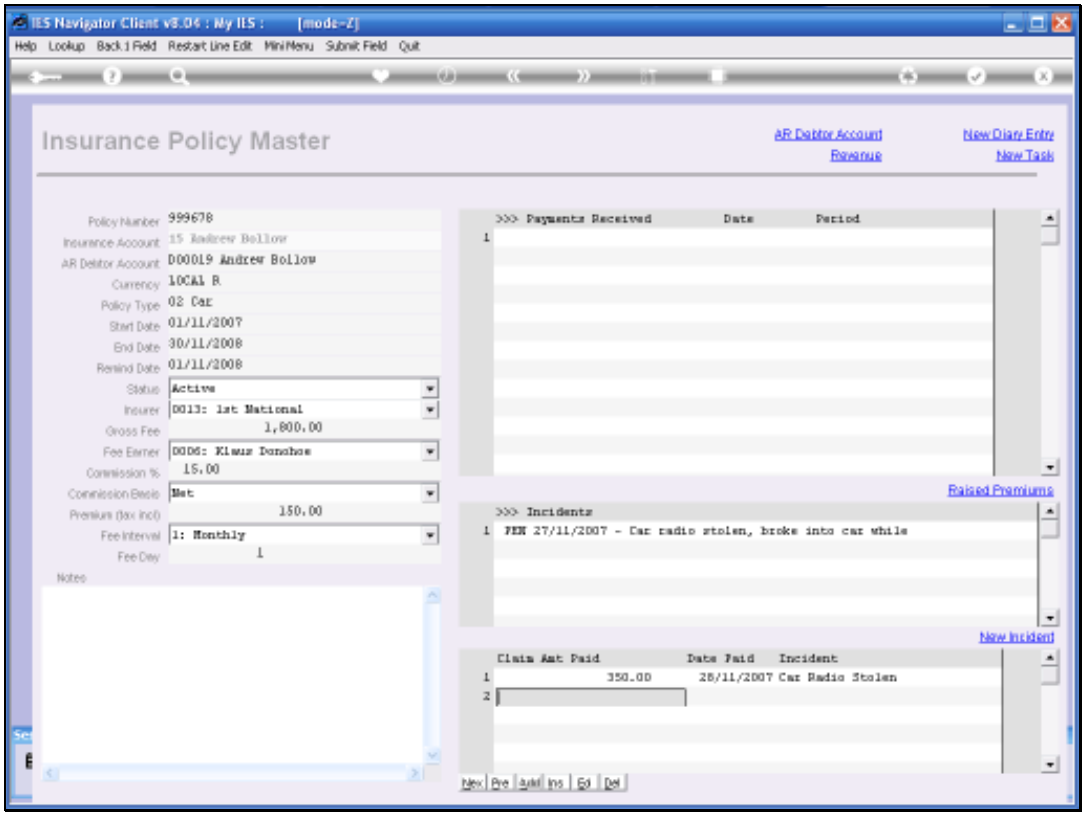
The Journals for the Payment and any other Administrational Accounting in connection therewith, is done by Standard Journals and here we are only Recording the event.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Lookup Back 1 Field Restart Line Edit MiniMenu Submit Field Quit
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident
1 350.00
New Pre Add Ins Ed Del

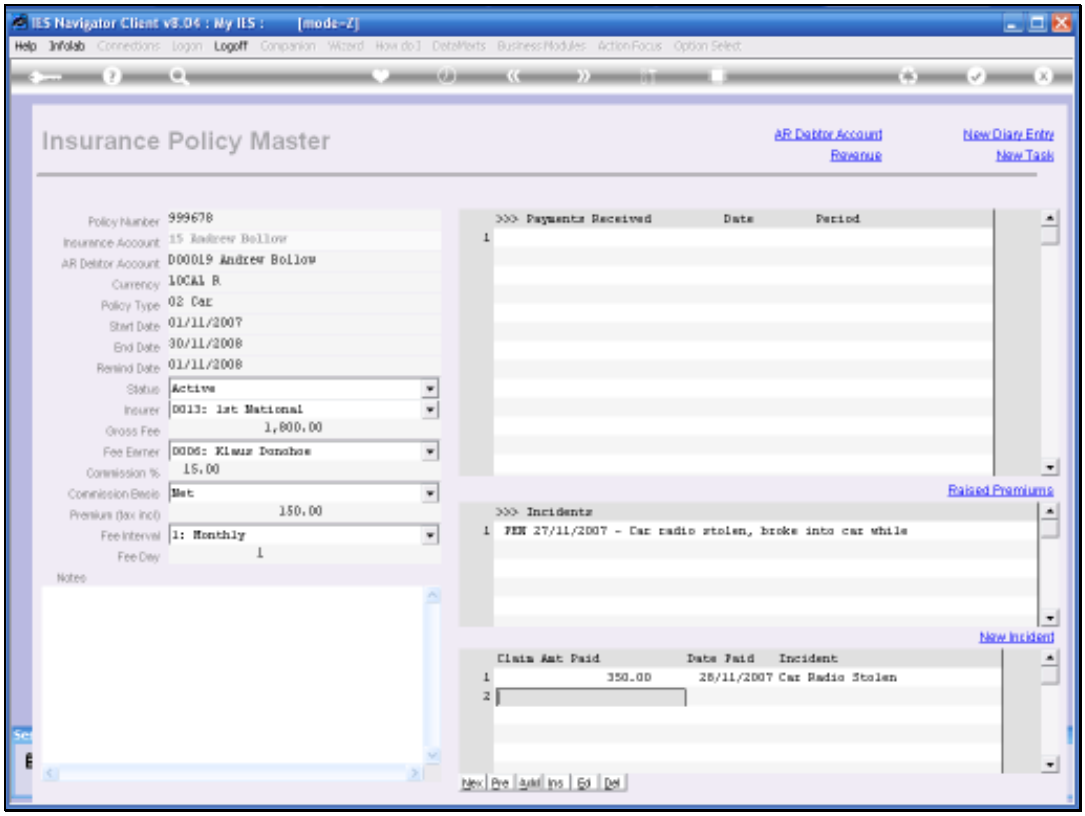
Slide 26


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Lookup Back 1 Field Restart Line Edit MiniMenu Submit Field Quit
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident
1 350.00 28/11/2007
Nav Pre Add Ins Ed Del

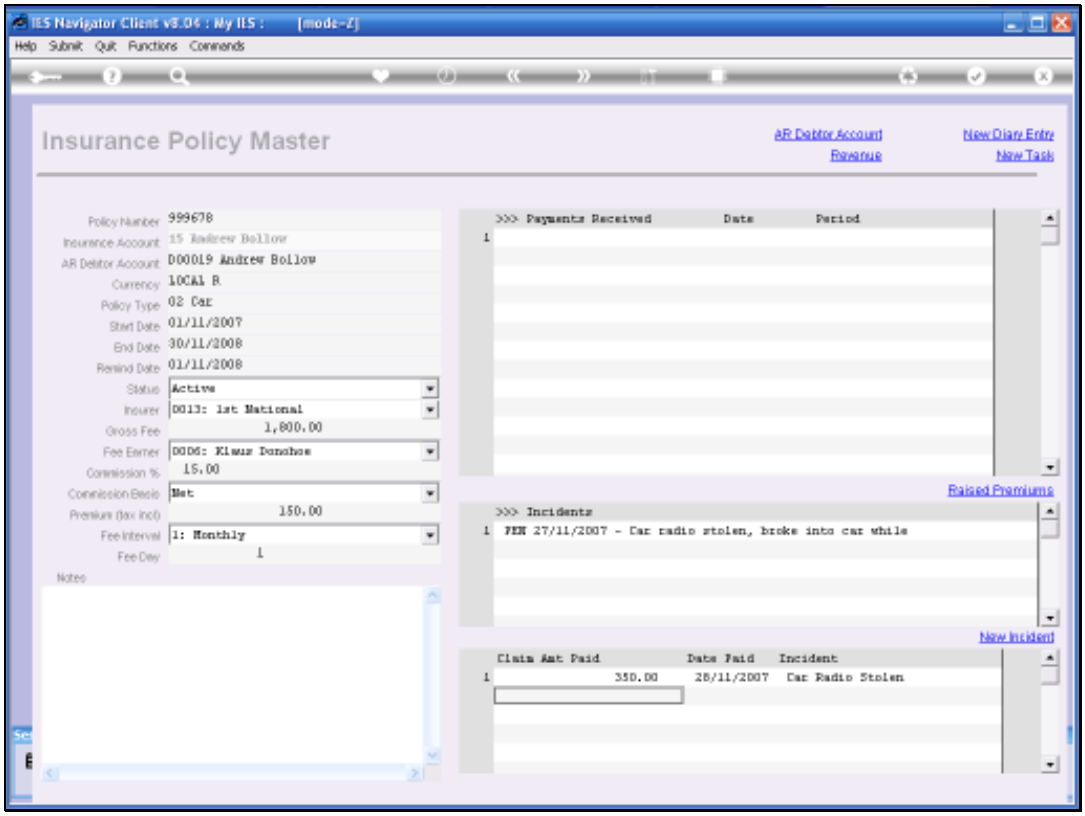
Slide 27


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Lookup Back 1 Field Restart Line Edit MiniMenu Submit Field Quit
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident
1 350.00 28/11/2007 Car Radio Stolen
New Pre Add Ins Ed Del

Slide 28


IES Navigator Client v8.04 : My IES : [mode=Z]
Help InfoHub Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules ActionFocus Option Select
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
End Date 30/11/2008
Remind Date 01/11/2008
Status Active
Insurer D013: 1st National
Gross Fee 1,800.00
Fee Earner D006: Klaus Donohoe
Commission % 15.00
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident
1 350.00 28/11/2007 Car Radio Stolen
New Pre Add Ins Ed Del

Slide 29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Help Submit Quit Functions Commands
Insurance Policy Master
AR Debtor Account
Revenue
New Diary Entry
New Task
Policy Number 999678
Insurance Account 15 Andrew Bollow
AR Debtor Account D00019 Andrew Bollow
Currency 10CAl R
Policy Type 02 Car
Start Date 01/11/2007
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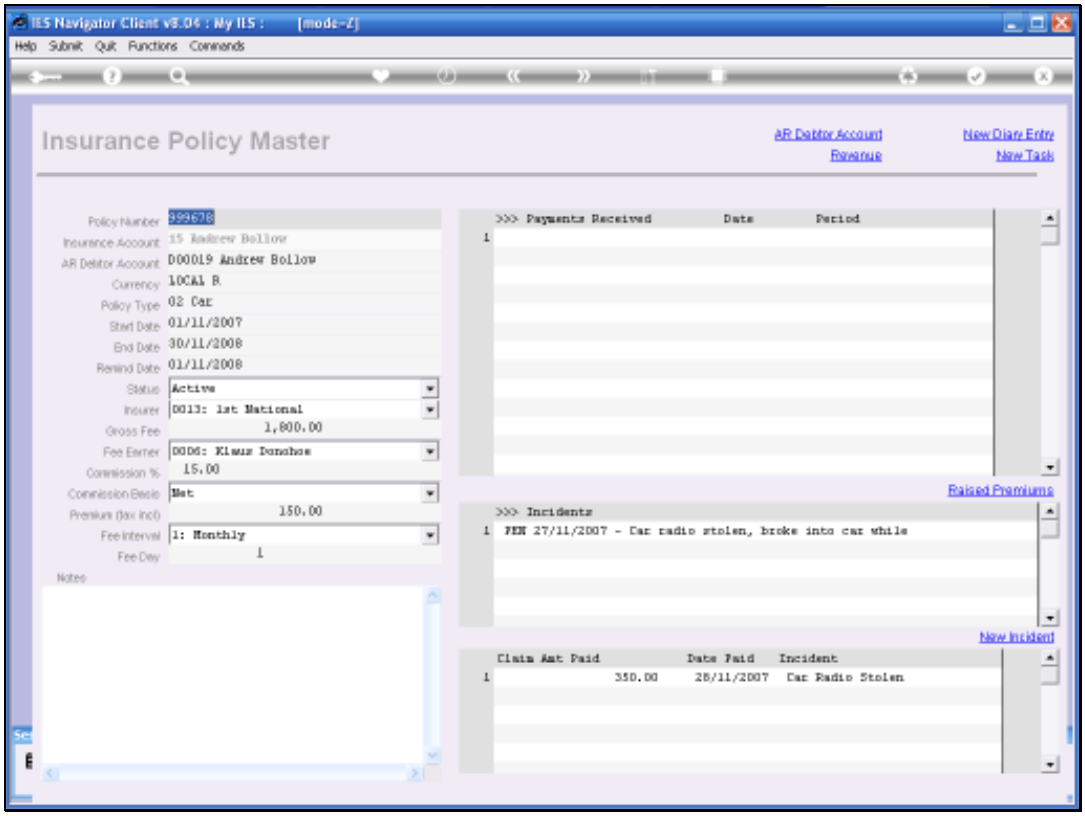
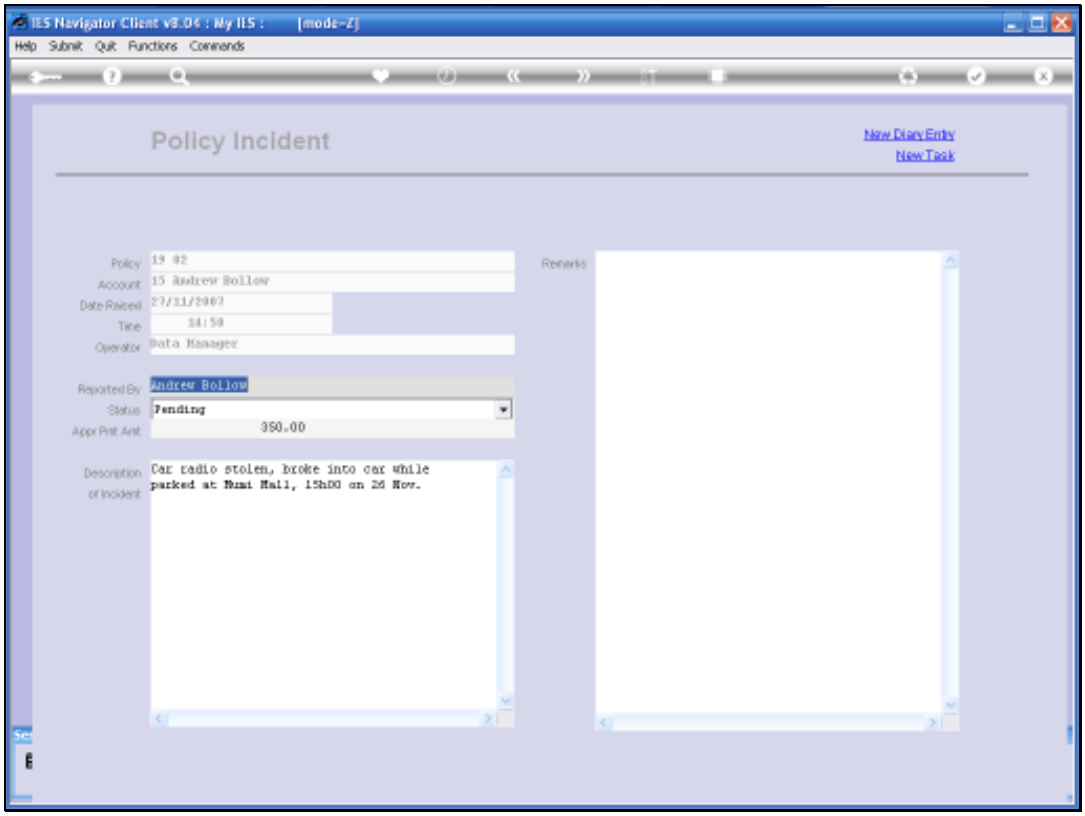
Commission Basis Net
Premium (tax incl) 150.00
Fee Interval 1: Monthly
Fee Day 1
Notes
>>> Payments Received Date Period
1
Raised Premiums
>>> Incidents
1 PEN 27/11/2007 - Car radio stolen, broke into car while
New Incident
Claim Amt Paid Date Paid Incident
1 350.00 28/11/2007 Car Radio Stolen

Slide 30

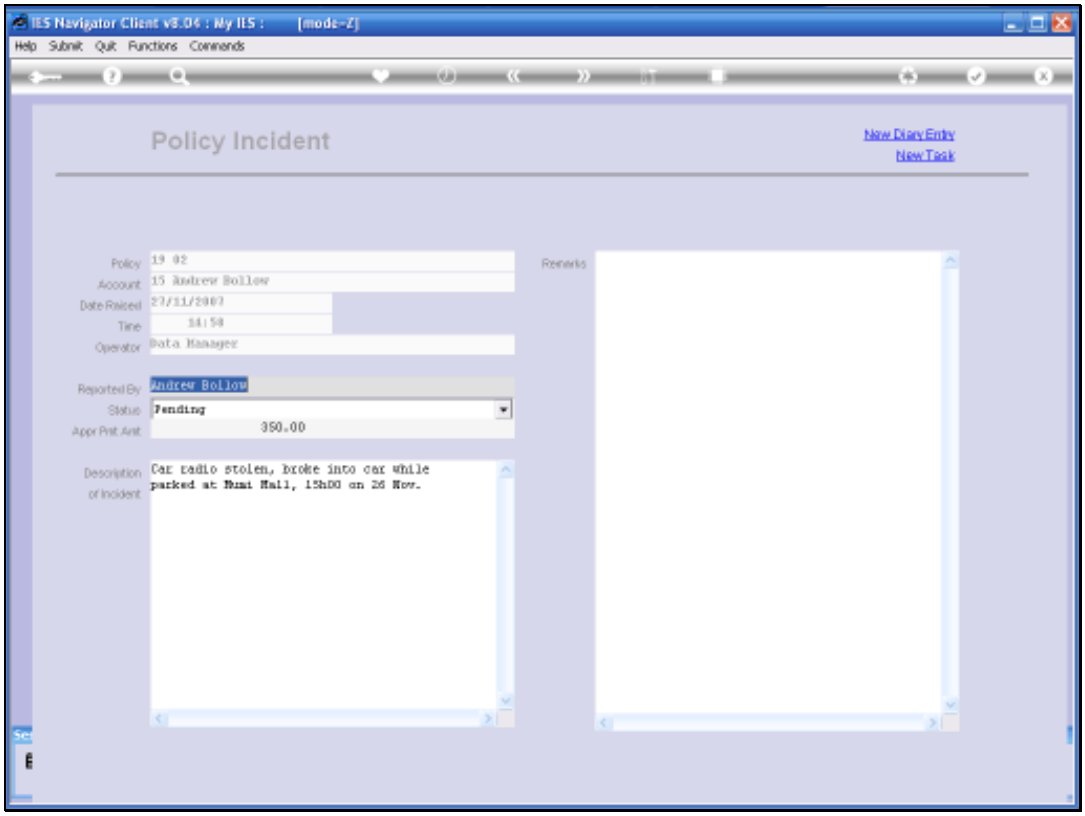


Slide 31

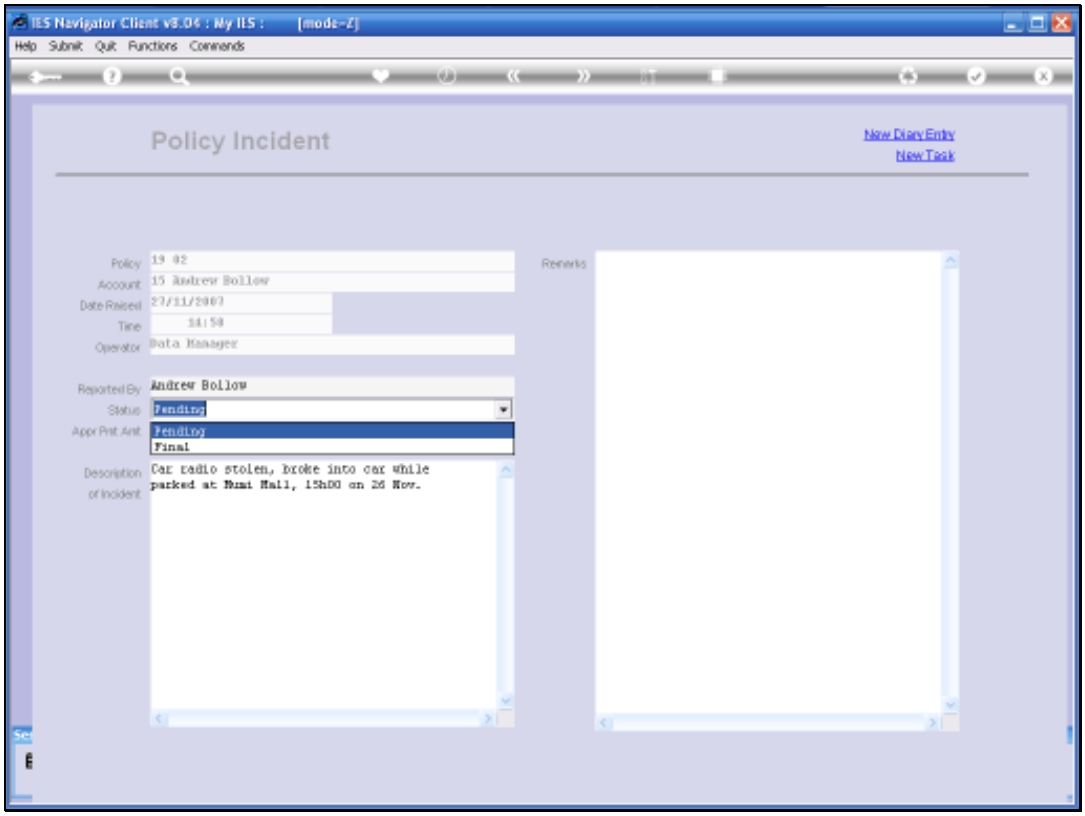
To conclude this particular Incident, I will go and select the Status as FINAL.


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt 350.00
Description of Incident Car radio stolen, broke into car while parked at Nuni Mall, 15h00 on 26 Nov.
Remarks

Slide 32


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt 350.00
Description of Incident Car radio stolen, broke into car while parked at Nuni Mall, 15h00 on 26 Nov.
Remarks

Slide 33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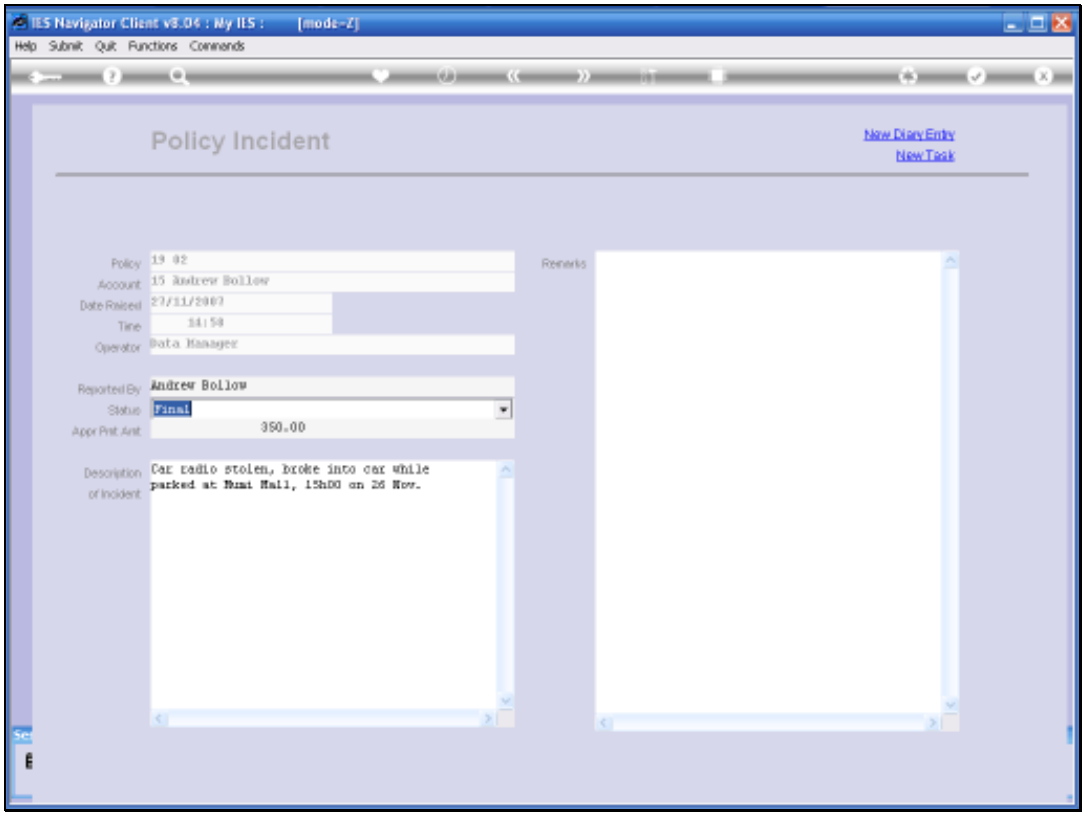
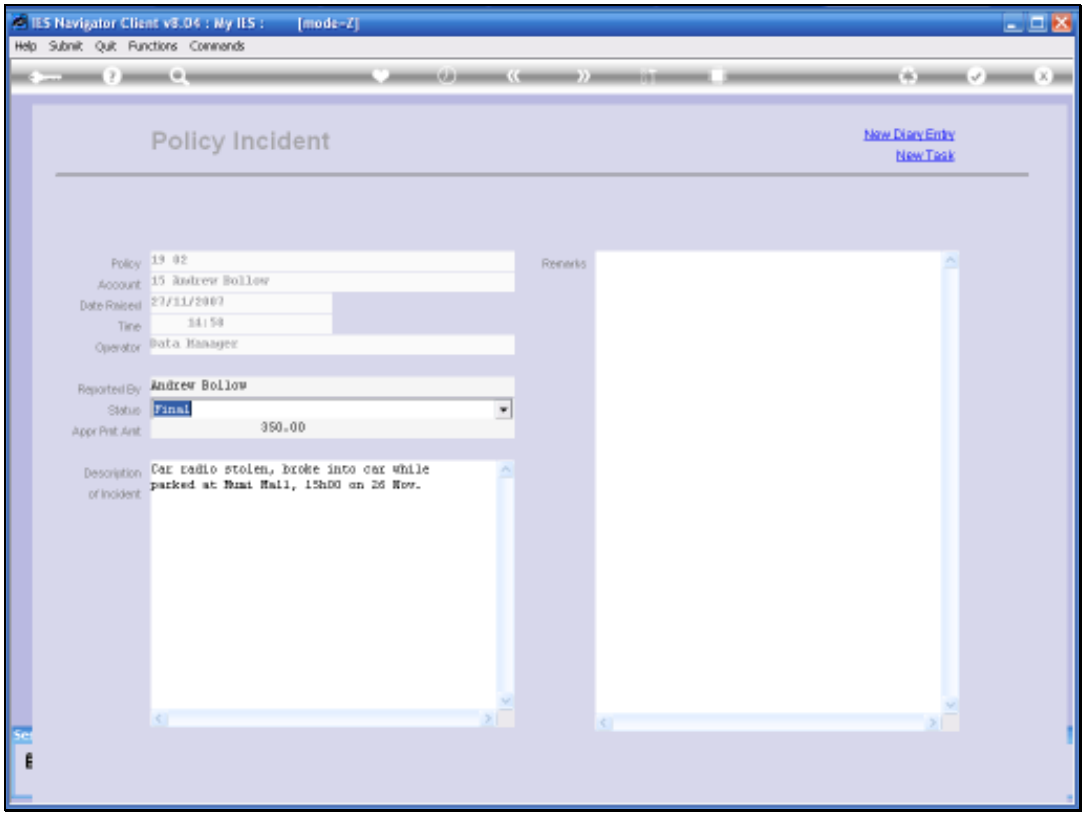
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Pending
Appr Pmt Amt
Pending
Final
Description of Incident
Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

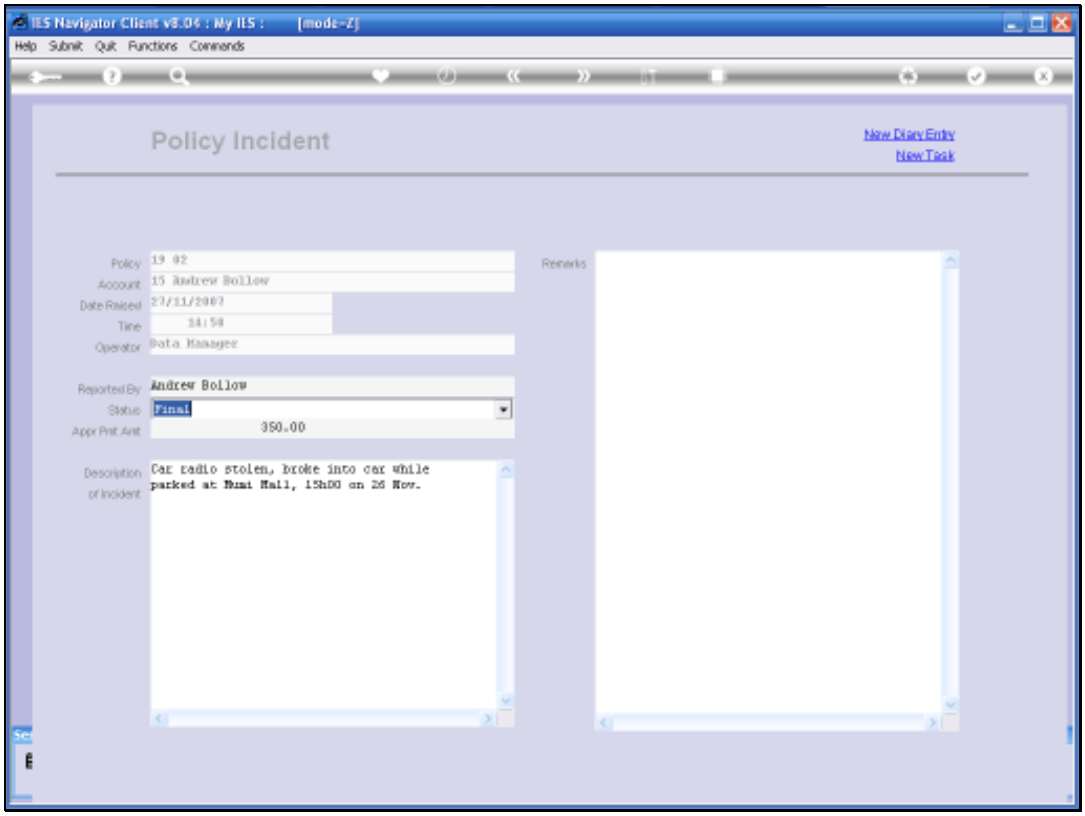
Slide 34


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Final
Appr Pmt Amt 350.00
Description of Incident Car radio stolen, broke into car while parked at Nuni Mall, 15h00 on 26 Nov.
Remarks

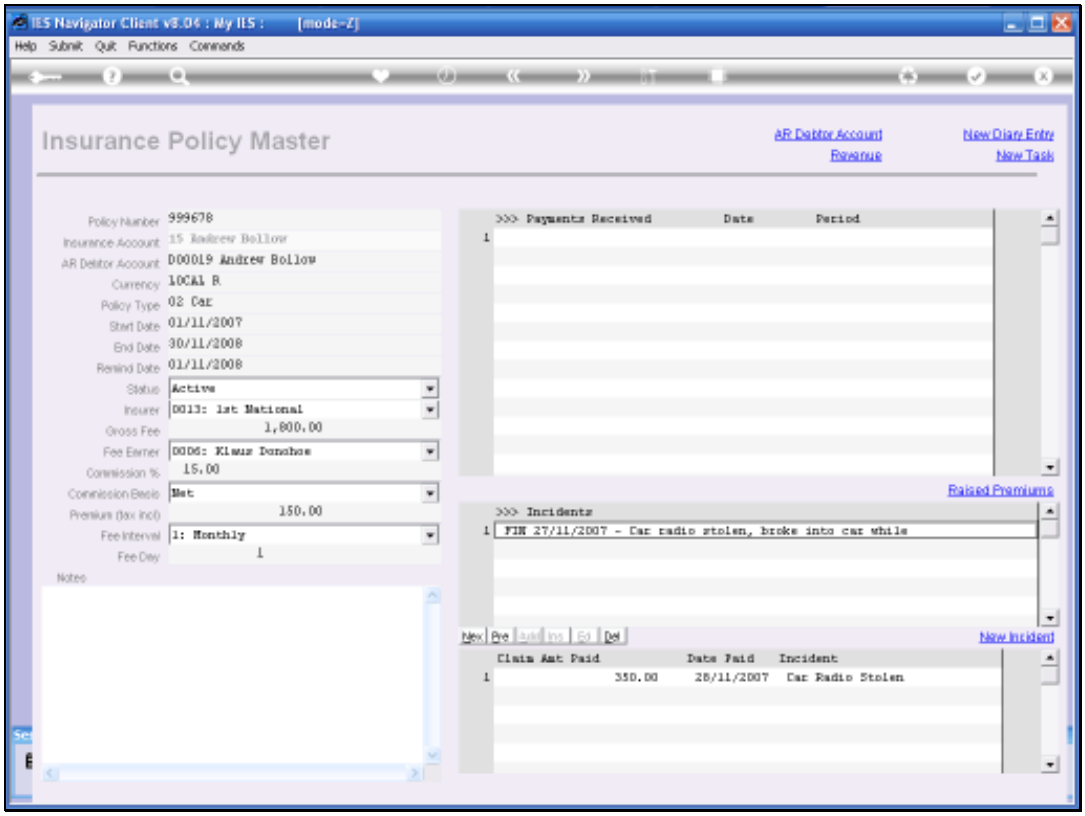
Slide 35


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Final
Appr Pmt Amt 350.00
Description of Incident Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

Slide 36


IES Navigator Client v8.04 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Policy Incident
New Diary Entry
New Task
Policy 19 02
Account 15 Andrew Bollow
Date Raised 27/11/2007
Time 14:58
Operator Data Manager
Reported By Andrew Bollow
Status Final
Appr Pmt Amt 350.00
Description of Incident Car radio stolen, broke into car while parked at Mumi Mall, 15h00 on 26 Nov.
Remarks

Slide 37



Slide 38

And the Incident on the Policy is now listed as FINAL.