

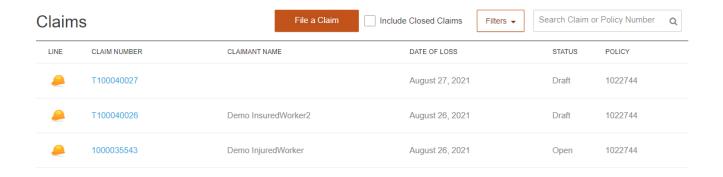
Viewing Claims

Last Updated February 1, 2022

To view Claims details, the registered user must have the Claims user permission. Upon clicking on the Claim tab, the screen will display Open claims for all lines of business, sorted by most recent Date of Loss. Claims in draft status (not yet submitted) have a claim number starting with "T." These drafts will stay in your view for 30 days.

Selecting View

Use the Filters dropdown to view only a specified line of business. You may include Closed or Draft claims by checking the appropriate tick box.



You may also use the search box in the upper right to look for a specific claim. Enter part or all of the claim number to search.

Use the directional markers at the top of the listing to advance to the next page.

Claim Details

Click on the claim number to load the Claim Details page:

Claim Summary





The Payments tab will display medical and indemnity payments made on the claim for the last 90 days.



Click on the Download to Excel link to load 38 fields of data for the selected claim into a separate spreadsheet.



You may click on the name of the assigned adjuster to send an email directly to the claim adjuster.

Running Reports

There are two different reports you may run to view claim information for your account.

Claims History

From the Claims tab, select Request Claims History button. A report will be generated and emailed to you shortly. This report will provide a detailed record of all individual claims.

Loss Runs

From the Claims tab, select the Request Loss Run button. A report will be generated and emailed to you shortly. This report will provide a historical snapshot of your organization's loss performance, as well as summarized claim information for each year.