

Oracle® Fusion Middleware
User's Guide for Oracle Insurance Claim
Management Process Accelerator
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ORACLE®

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Oracle Insurance Claim Management Process Accelerator

Oracle Fusion Middleware User's Guide for Oracle Insurance Claim Management Process Accelerator describes how to administer and use this process accelerator.

Audience

This document is intended for:

- Customer service representatives who use Oracle Insurance Claim Management to initialize claims
- Case managers, field adjusters, and fraud investigators who use Oracle Insurance Claim Management to process claims
- Administrators who maintain Oracle Insurance Claim Management seeded data, business rules, and reports

Related Documents

For more information, see the following Oracle resources:

Oracle Insurance Claim Management Process Accelerator

- *Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators*

Oracle Business Process Management Suite

- *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Business Rules

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*

Oracle WebCenter Content

- *Oracle WebCenter Content System Administrator's Guide for Content Server*

Oracle Fusion Middleware

- *Oracle Fusion Middleware Administrator's Guide*

Conventions

The following text conventions are used in this document:

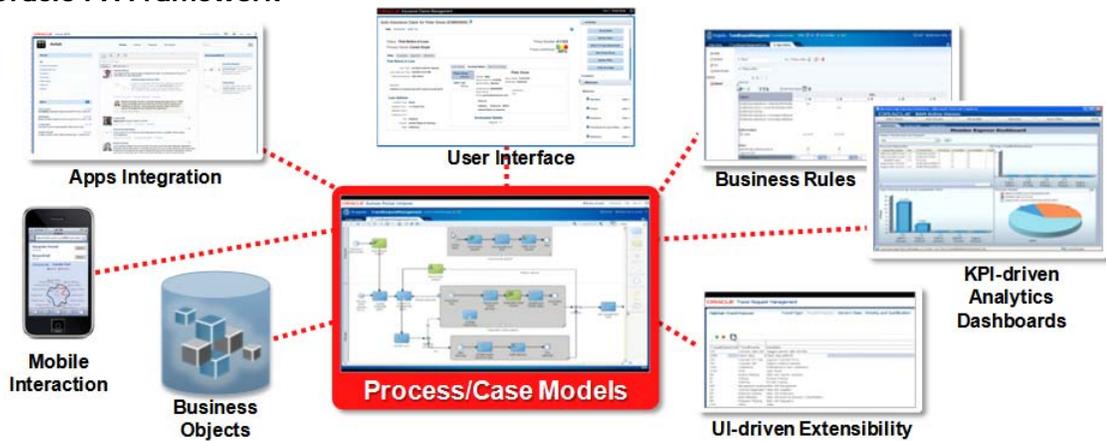
- **boldface** - Boldface type indicates graphical user interface elements or terms defined in text.

- *italic* - Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Overview of Oracle Process Accelerators

Oracle Process Accelerators (PA) are prebuilt business process solutions developed with Oracle Business Process Management (BPM) Suite or other Oracle SOA Suite components. Oracle Process Accelerators are developed to support and automate critical industry and horizontal business processes. Oracle PAs utilize best practices to accelerate time-to-value and increase quality. When needed, PAs include ready-to-use integration scenarios that extend Oracle applications. Oracle PAs can be deployed as-is or extended to meet your requirements. The Oracle PA framework diagram illustrates the basic components of a process accelerator.

Oracle PA Framework



Getting Started with Oracle Insurance Claim Management

This section is for new Oracle Insurance Claim Management (ICM) users who want a brief introduction.

Upon completion of this section, you will be able to:

- Describe the basic Oracle Insurance Claim Management process lifecycle.
- Describe the Oracle Insurance Claim Management pages and related Oracle Business Process Management Workspace pages.
- Start Oracle Insurance Claim Management.

Overview of Oracle Insurance Claim Management

Oracle Insurance Claim Management (ICM) Process Accelerator is a process solution, based on the adaptive case management framework, which enables organizations to create and process insurance claims. Oracle ICM provides dashboards to view process analytics and claim summary reports. Administrators can modify the business rules and seeded data.

Oracle ICM is a role-based solution; your role determines the activities you can perform. Oracle ICM delivers the following roles:

- The customer service representative creates a claim and dispatches emergency services, if needed.
- The case manager is the primary claim owner responsible for validating the claim, assigning a field adjuster if needed, and negotiating a settlement.
- The field adjuster assesses damage and provides estimates, if needed.
- The fraud investigator investigates fraudulent claims.

Because Oracle ICM is based on the adaptive case management framework, there is no single BPM process model to dictate claim processing. Claims are processed based on the activities performed by each role and the defined business rules. Activities are performed on an adhoc basis depending on the circumstances of a claim. Some activities are repeatable due to the adaptive case management framework; while others are performed once. The Claim Status table provides the details for each status, the case activity, the role, when the activity changes to the next phase, and if the activity is repeatable.

Claim Status

Claim Status	Case Activity	Role	Activity Changes Phase To	Repeatable Activity
N/A	Initialize New Claim	CSR	FNOL	No
FNOL	Update FNOL	CSR		Yes
FNOL	Verify Coverage	CSR		Yes
FNOL	Assign Case Manager	CSR	Evaluation	No
FNOL	Dispatch Service	CSR		Yes
Evaluation	Validate Claim	Case Manager		Yes
Evaluation	Establish Claim Reserve	Case Manager		Yes
Evaluation	Evaluate for Fast Track	Case Manager		Yes
Evaluation	Initiate Fast Track Settlement	Case Manager	Settlement	No
Evaluation	Update FNOL	Case Manager		Yes
Evaluation	Assign Field Adjuster	Case Manager	Appraisal	No
Appraisal	Examine Damage	Field Adjuster		Yes
Appraisal	Create Cost Estimates	Field Adjuster		Yes
Appraisal	Submit Appraisal	Field Adjuster	Settlement	No
Settlement	Create Settlement Offer	Case Manager		Yes
Settlement	Record Offer Outcome	Case Manager		Yes
Settlement	Create Payment	Case Manager		Yes
Settlement	Initiate Arbitration	Case Manager	Arbitration	No
Settlement	Initiate Recovery	Case Manager	Recovery	No
Fraud Review	Record Fraud Review Status	Fraud Investigator	If fraud, then the status remains in Fraud Review. If there is no fraud, then the status reverts back to whatever it was immediately before referral to Fraud Department.	Yes
Any	Run Fraud Check	All		Yes
Any	Refer to Fraud Department	All	Fraud Review	Yes
Any	Close Claim	All	Closed	No
Any	Decline Claim	All	Closed	No

Understanding the Oracle Insurance Claim Management Pages

You navigate Oracle Insurance Claim Management (ICM) through the Oracle Business Process Management Workspace. Your role within Oracle ICM determines the tasks you can perform, and the pages you can access. Some of these pages are Oracle Business Process Management Workspace, others are Oracle ICM. Understanding the pages associated to a task or role makes you more effective in your use of Oracle ICM.

This topic addresses the various Oracle Business Process Management Workspace and Oracle ICM pages you use.

Understanding the Oracle Insurance Claim Management Pages

1. The Oracle Business Process Workspace **Tasks** page appears after you log into Oracle Business Process Management Workspace. This is an Oracle Business Process Management Workspace page.

From here you can:

- Take action on a claim by executing the tasks assigned to you in **Views, My Tasks**
- Access Oracle ICM from the **Links** link

2. Use the **Manage Insurance Claims** link to access Oracle Insurance Claim Management. This is an Oracle Business Process Management Workspace page.

3. Use the **Create First Notice of Loss** page to create and submit an insurance claim. This is an Oracle Insurance Claim Management page.
4. Use the **Auto Insurance Claim for Name (number)** page to perform all activities related to a claim. This is an Oracle Insurance Claim Management page.
5. Use the **Maintain Lookup Types** page to modify the lookup type codes made available when creating claims. This is an Oracle Insurance Claim Management page.
6. Use the **Maintain Asset Details** page to replace the sample data with your own. Assets are made available when creating claims. This is an Oracle Insurance Claim Management page.
7. Use the **Maintain Policy Details** page to replace the sample data with your own. Policies are made available when creating claims. This is an Oracle Insurance Claim Management page.
8. Use the **Maintain Service Providers** page to replace the sample data with your own. Service providers are made available when creating claims. This is an Oracle Insurance Claim Management page.
9. You have completed the **Understanding the Oracle Insurance Claim Management Pages** topic.

Starting Oracle Insurance Claim Management

You need a valid Oracle Business Process Management Workspace URL, user ID, and password to access Oracle Insurance Claim Management (ICM). Contact your system administrator for the URL and your login credentials.

In this topic, you will log into Oracle Business Process Management Workspace and access Oracle ICM.

Procedure: Starting Oracle Insurance Claim Management

1. To begin, enter **http://server name:port/bpm/workspace** in your web browser.

Replace server name and port with the server name and port number you received from your administrator. The supported web browsers are: Microsoft Internet Explorer 8.x, Chrome 11.x, or Mozilla Firefox 4.x.

The Oracle Business Process Workspace **Sign In** page opens.
2. Enter your username and password in the respective fields, then click **Login**.
3. You are now logged into Oracle Business Process Management Workspace.
4. Navigate to the **Manage Insurance Claims** link.
5. Use the **Manage Insurance Claims** link to access Oracle Insurance Claim Management.
6. You have completed the **Starting Oracle Insurance Claim Management** topic.

Using Oracle Insurance Claim Management

This section is for customer service representatives who initiate a claim and other insurance personnel who process the claim.

Upon completion of this section, you will be able to:

- Initialize a claim.
- Open a claim.
- Verify coverage.
- Update a claim.
- Dispatch a service provider.
- Assign a claim to other personnel
- Validate a claim.
- Establish a claim reserve.
- Initiate a fast track settlement.
- Submit an appraisal.
- Create a settlement offer.
- Record the offer outcome.
- Create settlement payments.
- Initiate arbitration.
- Initiate recovery.
- Run fraud check.
- Refer a claim to the Fraud Department.
- Record fraud review status.
- Close a claim.
- Decline a claim.

Initializing a Claim

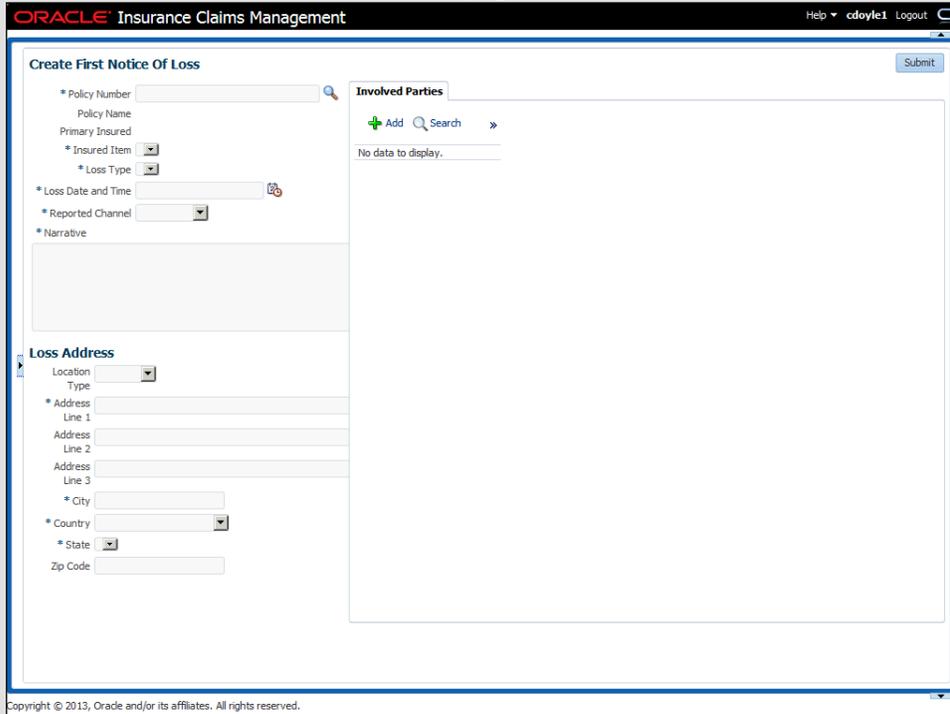
Imagine you are an insurance customer service representative and a policy owner calls you to report an incident he was in. You can use Oracle Insurance Claim Management to submit a claim on the policy holder's behalf.

In this topic, you will submit a claim.

Procedure: Initializing a Claim

1. Begin by navigating to the **Create First Notice of Loss** page.
Click the **Manage Insurance Claims** link.
2. Click the **Create First Notice Of Loss** link.
3. Close the pane to see more of the **Create First Notice of Loss** page.
Click the **Collapse** pane.

- Use the **Create First Notice of Loss** page to create and submit an insurance claim.



- Note:** All fields with an **Asterisk (*)** are required.

Click in the **Policy Number** field.

- You can search or enter a policy number.

Enter the desired information into the **Policy Number** field. Enter "**A11323**".

- Press **[Enter]**.

- The **Policy Name** and **Primary Insured** fields populate based on the policy number.

- Complete the remaining fields as necessary. In this example, the fields have been completed for you.

- Use the **Involved Parties** tab to add all parties involved in the accident.

- You can add involved parties to the First Notice of Loss, or select them from the database using the Search button. In this example, you are going to add them.

Click the **Add** button.

- Complete the Involvement and Party Details as necessary. In this example, the fields have been completed for you.

- Click the **Loss Details** tab.

- Use the **Loss Details** tab to add detailed information regarding the accident. This tab is only visible when the loss type is Accident with No Injuries.

ORACLE Insurance Claims Management Help cdoye1 Logout

Create First Notice Of Loss Submit

* Policy Number

Policy Name

Primary Insured

* Insured Item

* Loss Type

* Loss Date and Time

* Reported Channel

* Narrative
Collision with another car, no injuries, damage to front passenger side

Loss Address

Location

Type

* Address

Line 1

Address

Line 2

Address

Line 3

* City

* Country

* State

Zip Code

Loss Details Involved Parties

Number of Vehicles

Involved

Number of Witnesses

Who was Driving?

Vehicle Towed

Towing Requested

Damage Description

Injury Description

Other Vehicle(s)

Description

Police Report Filed

Police Report Filed Date

Police Report Number

Police Department

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15. Click in the **Number of Vehicles Involved** field.
16. Enter the desired information into the **Number of Vehicles Involved** field. Enter "2".
17. Complete the remaining fields as necessary. In this example, the fields have been completed for you.
18. Click the **Submit** button.
19. Click the **OK** button.
20. Your claim is created. You can now update the claim or perform other activities related to your customer service representative responsibilities.
21. You have completed the **Initializing a Claim** topic.

Opening a Claim

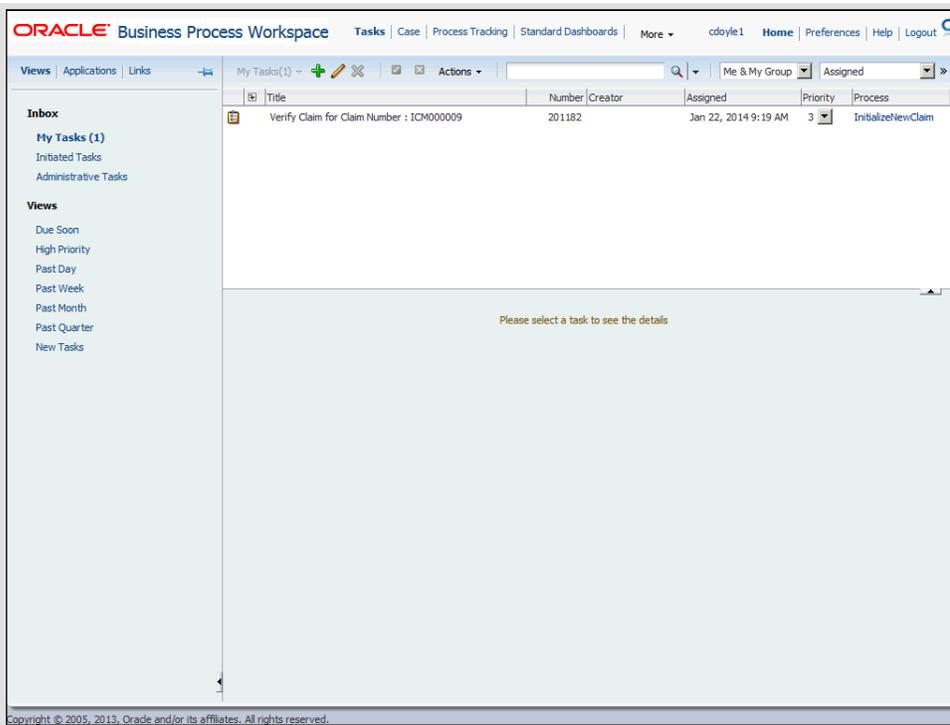
There are two ways to open a claim. You can open a claim from the My Tasks page if there is a task for the claim. You can also open a claim from the Insurance Claims page.

In this topic, you will open a claim from the My Tasks and the Insurance Claims pages.

Procedure: Opening a Claim

1. You can use the **My Tasks** page to view all claims on which you have to act.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



2. Select the claim task you want to take action on.

Click the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will click the task.

Click the **Task** object.

3. Open the claim.

Click the **claim number** link.

4. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

ORACLE Insurance Claims Management Help cdoye1

Auto Insurance Claim for Peter Snow (ICM000009)

Data Documents Audit Trail

Status **First Notice of Loss** Policy Number **A11323**
 Primary Owner **cdoye1** Fraud Likelihood **18%**

FNOL Evaluation Appraisal Settlement

First Notice of Loss

Loss Type **Accident with No Injuries**
 Loss Date and Time **1/6/2014 2:26 PM**
 Reported Channel **Agent**

Narrative
Collision with another car, no injuries, damage to front passenger side

Loss Address
 Location **Street**
 Type
 Address Line 1 **444 Market St**
 Address Line 2
 Address Line 3
 City **San Francisco**
 Country **United States of America**

Loss Details Involved Parties Service Providers

Number of Vehicles Involved 2
 Number of Witnesses 2
 Who was Driving? Peter Snow
 Vehicle Towed No
 Towing Requested No
 Damage Description Front passenger panel crunched
 Injury Description
 Other Vehicle(s) Description
 Police Report Filed No
 Police Report Filed Date
 Police Report Number
 Police Department

Activities

Available

EmailActivity
 SimpleWorkflowActivity
 Close Claim
 Decline Claim
 Refer To Fraud Department
 Run Fraud Check
 Update FNOL

Milestones

Milestones

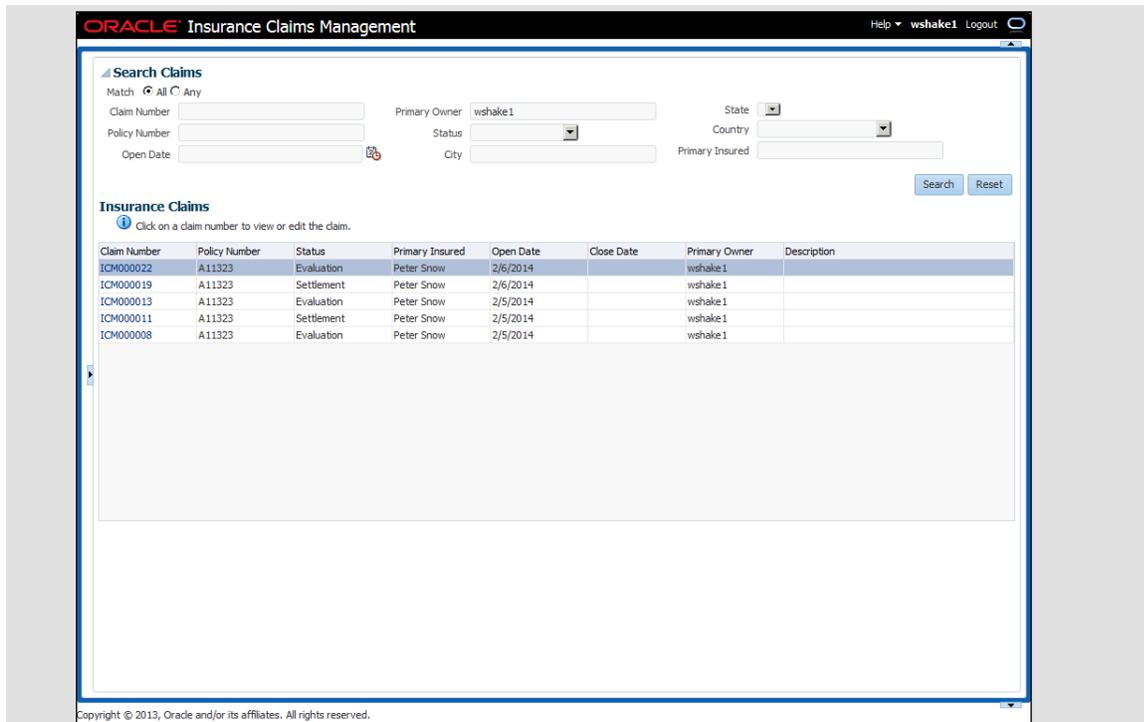
Appraisal Open
 Closed Open
 Evaluation Open
 First Notice Of Loss (FNOL) Open
 Settlement Open

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- Next, search and open a claim from the **Insurance Claims** page. Begin by navigating to the **Insurance Claims** page.

Click the **Links** link.

- Click the **Manage Insurance Claims** link.
- Click the **Expand Search Claims** pane.
- Click the **Collapse** pane.
- Use the **Search Claims** page to search for claims.



10. You can specify search criteria or click **Search** without criteria to list all claims. In this example, search criteria has been filled out for you.

Click the **Search** button.

11. The search lists claims that match your criteria. From here, you can click on a claim number to view or edit the claim.

12. Open the claim.

Click the **claim number** link.

13. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

14. You have completed the **Opening a Claim** topic.

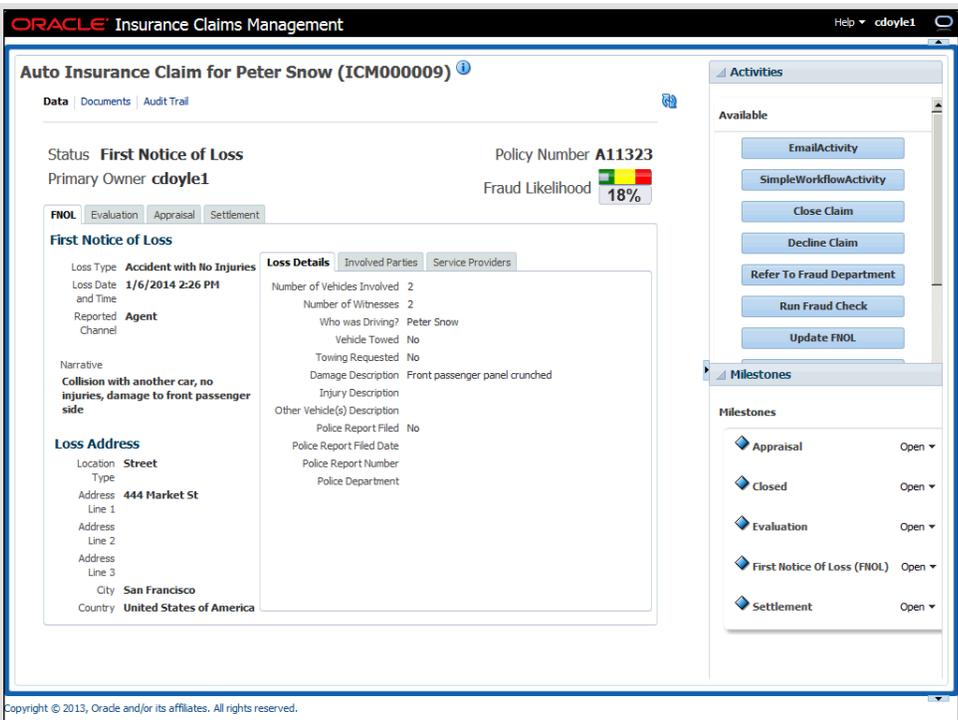
Verifying Coverage

As a customer service representative, you review a claimant's policy to ensure the damaged asset is covered by the insurance policy, and that the policy is current.

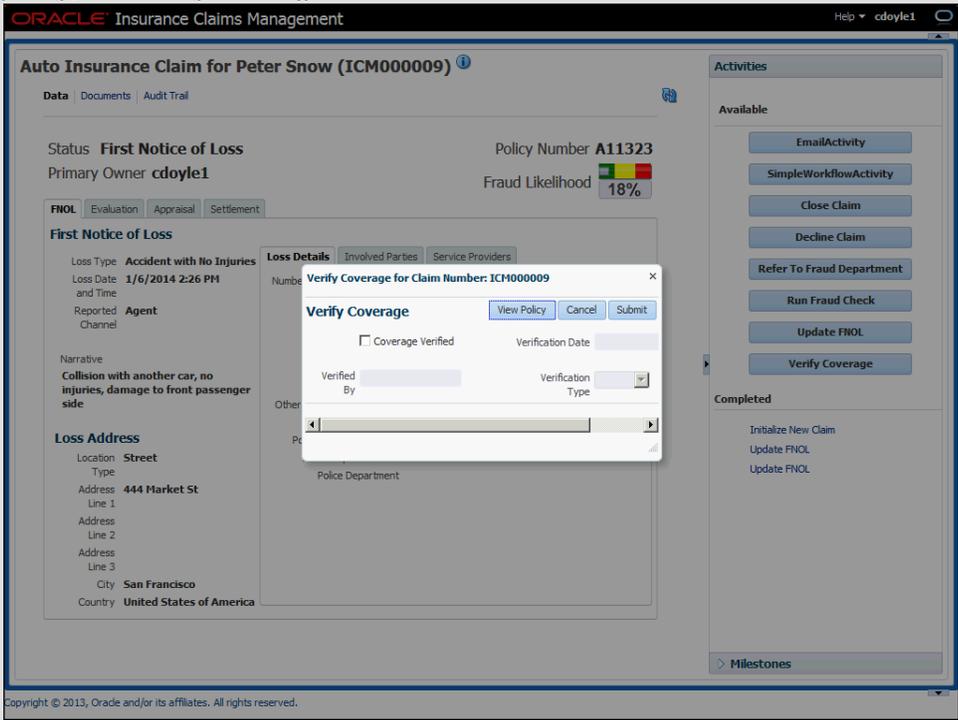
In this topic, you will verify coverage.

Procedure: Verifying Coverage

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Close the **Milestones** pane to view the available activities.
Click the **Milestones** pane.
3. Click the **Verify Coverage** button.
4. Use the **Verify Coverage for Claim Number: number** dialog box to view the claimant's policy, and verify coverage.



5. Click the **View Policy** button.

6. View each page of the policy.
- Click the **Next** button.
7. Close the policy window, and return to the previous page to verify coverage.
8. Click the **Coverage Verified** option.
9. The **Verification Date**, **Verified By**, and **Verification Type** fields populate once the **Coverage Verified** field is checked.
10. Click the **Submit** button.
11. Coverage is now verified.
12. You have completed the **Verifying Coverage** topic.

Updating a Claim

You created a claim, now you want to add a photo of the damage and add the adverse party details.

In this topic, you will update the first notice of loss (FNOL) by adding a document and the adverse party details.

Procedure: Updating a Claim

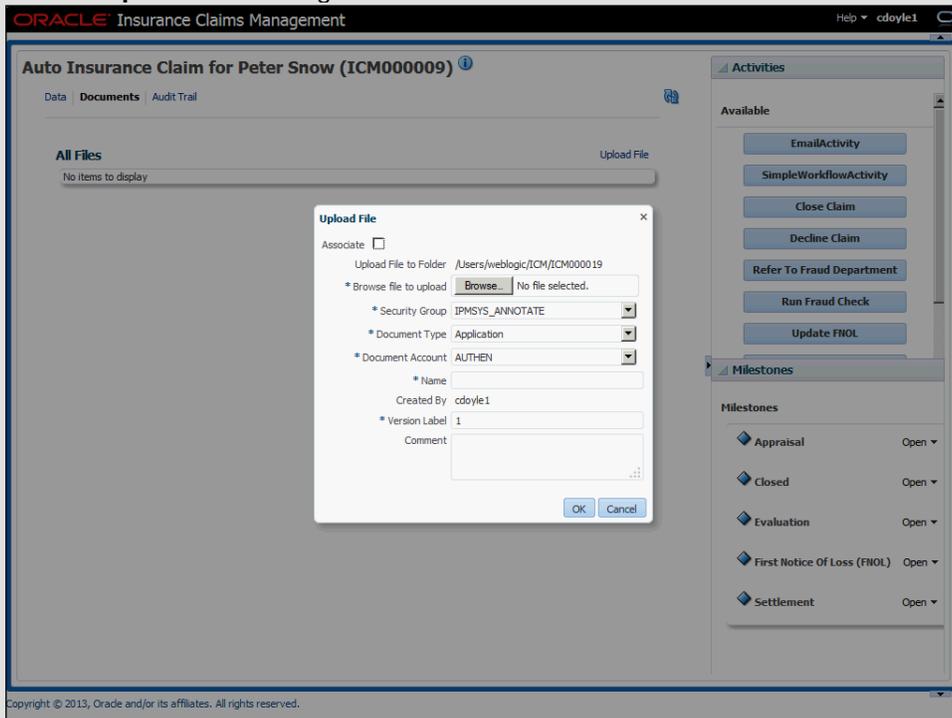
1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

The screenshot displays the Oracle Insurance Claims Management interface for an Auto Insurance Claim for Peter Snow (ICM000009). The interface is divided into several sections:

- Header:** Oracle Insurance Claims Management, Help, cdoyle1
- Claim Information:** Status: First Notice of Loss, Policy Number: A11323, Primary Owner: cdoyle1, Fraud Likelihood: 18%.
- First Notice of Loss (FNOL) Section:**
 - Loss Type:** Accident with No Injuries
 - Loss Date and Time:** 1/6/2014 2:26 PM
 - Reported Channel:** Agent
 - Narrative:** Collision with another car, no injuries, damage to front passenger side
 - Loss Address:** Street: 444 Market St, City: San Francisco, Country: United States of America
 - Loss Details:**
 - Number of Vehicles Involved: 2
 - Number of Witnesses: 2
 - Who was Driving?: Peter Snow
 - Vehicle Towed: No
 - Towing Requested: No
 - Damage Description: Front passenger panel crunched
 - Injury Description:
 - Other Vehicle(s) Description:
 - Police Report Filed: No
 - Police Report Filed Date:
 - Police Report Number:
 - Police Department:
- Activities Sidebar:** Available actions include EmailActivity, SimpleWorkflowActivity, Close Claim, Decline Claim, Refer To Fraud Department, Run Fraud Check, and Update FNOL.
- Milestones Sidebar:** A list of claim stages: Appraisal, Closed, Evaluation, First Notice Of Loss (FNOL), and Settlement, each with an 'Open' status.

2. First, upload a document.
- Click the **Documents** link.

3. Click the **Upload File** link.
4. Use the **Upload File** dialog box to attach documents to the claim.



5. In this example, the file has been selected for you.
Click the **OK** button.
6. Click the **Data** link.
7. Next, add the adverse party details.
Click the **Update FNOL** button.
8. Use the **Update First Notice of Loss** page to modify any part of the claim.

ORACLE Insurance Claims Management Help cdoyl1

Update First Notice Of Loss [Update] [Cancel]

* Loss Type: Accident with No Injuries

* Loss Date and Time: 1/6/2014 2:26 PM

* Reported Channel: Agent

* Narrative: Collision with another car, no injuries, damage to front passenger side

Loss Address

Location Type: Street

* Address Line 1: 444 Market St

Address Line 2:

Address Line 3:

* City: San Francisco

* Country: United States of America

* State: California

Zip Code: 94111

Loss Details | Involved Parties

Number of Vehicles Involved: 2

Number of Witnesses: 2

Who was Driving?: Peter Snow

Vehicle Towed: No

Towing Requested: No

Damage Description: Front passenger panel crunched

Injury Description:

Other Vehicle(s) Description:

Police Report Filed: No

Police Report Filed Date:

Police Report Number:

Police Department:

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9. Update the claim as necessary. In this example, add an adverse party.

Click the **Involved Parties** tab.

10. Use the **Involved Parties** tab to add all parties involved in the accident.

ORACLE Insurance Claims Management Help cdoyl1

Update First Notice Of Loss [Update] [Cancel]

* Loss Type: Accident with No Injuries

* Loss Date and Time: 1/6/2014 2:26 PM

* Reported Channel: Agent

* Narrative: Collision with another car, no injuries, damage to front passenger side

Loss Address

Location Type: Street

* Address Line 1: 444 Market St

Address Line 2:

Address Line 3:

* City: San Francisco

* Country: United States of America

* State: California

Zip Code: 94111

Involved Parties

Mr. Peter Snow
Claimant

Involvement Details

* Involvement Type: Claimant

Reporter Adverse Party Injured Deceased

Comments:

Party Details

Salutation: Mr.

* First Name: Peter

Middle Name:

* Last Name: Snow

Marital Status:

Gender:

Date of Birth: 7/1/1986

Government Id: 987-65-4320

Nationality: American

* Email: psnow@example.com

* Cell Phone:

Home Phone: 408-555-0101

Work Phone:

Fax:

* Address Line 1: 401 Island Parkway

Address Line 2:

Address Line 3:

* City: Redwood Shores

* Country: United States of America

* State: California

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11. You can add involved parties to the First Notice of Loss, or select them from the database using the Search button. In this example, you are going to add them.

Click the **Add** button.

12. Complete the Involvement and Party Details as necessary. In this example, the fields have been completed for you.
13. Click the **Update** button.
14. You have completed the **Updating a Claim** topic.

Dispatching a Service Provider

As a customer service representative, you can dispatch a service provider to the accident location, if needed.

In this topic, you will dispatch a service provider.

Procedure: Dispatching a Service Provider

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

The screenshot shows the Oracle Insurance Claims Management interface for a claim titled "Auto Insurance Claim for Peter Snow (ICM000023)". The page is divided into several sections:

- Header:** "ORACLE Insurance Claims Management" with a user menu for "cdoyle1".
- Claim Information:** Status "First Notice of Loss", Policy Number "A11323", Primary Owner "cdoyle1", and Fraud Likelihood "55%".
- Navigation:** Tabs for "FNOL", "Evaluation", "Appraisal", and "Settlement".
- First Notice of Loss (FNOL) Section:**
 - Loss Type:** Accident with No Injuries
 - Loss Date and Time:** 2/4/2014 5:22 PM
 - Reported Channel:** Agent
 - Narrative:** Swerved to miss a dog and hit a tree.
 - Loss Address:** Street Type, Address 488 Almaden Blvd, City San Jose, Country United States of America, State California.
 - Loss Details:**
 - Number of Vehicles Involved: 1
 - Number of Witnesses: 1
 - Who was Driving?: Peter Snow
 - Vehicle Towed: No
 - Towing Requested: Yes
 - Damage Description: Front axle bent
 - Injury Description
 - Other Vehicle(s) Description
 - Police Report Filed: No
 - Police Report Filed Date
 - Police Report Number
 - Police Department
- Activities Panel:** A list of available activities including "EmailActivity", "SimpleWorkflowActivity", "Assign Case Manager", "Close Claim", "Decline Claim", "Dispatch Service", and "Refer To Fraud Department".
- Milestones Panel:** A list of milestones including "Appraisal", "Closed", "Evaluation", "First Notice Of Loss (FNOL)", and "Settlement", each with an "Open" status.

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2. Click the **Dispatch Service** button.
3. Use the **Dispatch Service for Claim Number: number** dialog box to dispatch a service provider.

The screenshot displays the 'Dispatch Service' interface within the Oracle Insurance Claims Management system. The main area features a map with an orange flag marking the accident site and a green flag marking a service provider. To the right, the 'Available Service Providers' list includes 'Reliable Rental' (Peter Zhang, 888-231-1236, Car Rental Service), 'Speedy Taxi Company' (Freda Peters, 888-231-1235, Taxi Service), and 'ABC Towing Services' (Al Smith, 888-231-1234, Towing Service). The 'Assigned Service Providers' section is currently empty, showing 'No data to display.' The interface includes 'Cancel' and 'Submit' buttons at the top right, and 'Assign' and 'Remove' buttons on the right side of the provider lists.

4. The orange flag represents where the accident is. The green flag represents a service provider.
5. Select the service provider closest to the accident.
Click the **service provider** option.
6. Click the **Assign** button.
7. You can edit the message the system sends to the service provider.
Click the **Edit** button.
8. In this example, the message has been edited for you.
Click the **OK** button.
9. Click the **Submit** button.
10. Click the **Service Providers** tab.
11. Use the **Service Providers** tab to verify what service providers have been dispatched. You can also see the message that was sent to the service provider.

12. You have completed the **Dispatching a Service Provider** topic.

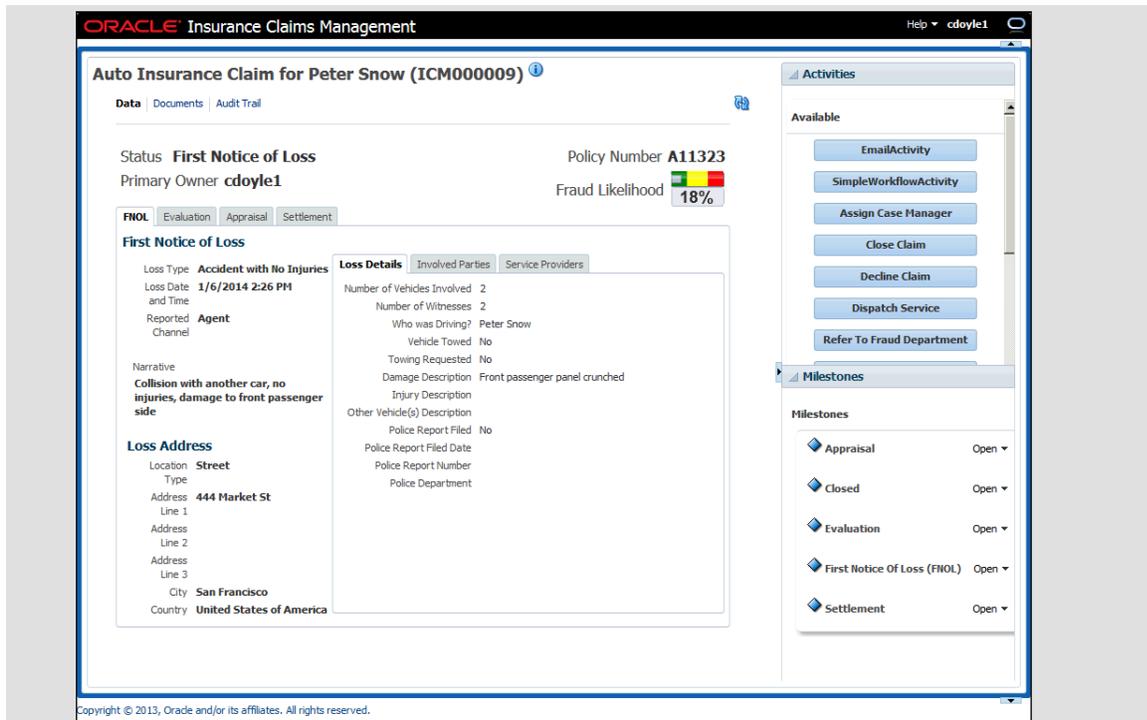
Assigning a Claim to Other Personnel

Once you have completed the activities associated to your role, you assign the claim to the next person. Customer service representatives can assign a claim to a case manager. Case managers can assign a claim to a field adjuster.

In this topic, you will assign a claim to a case manager.

Procedure: Assigning a Claim to Other Personnel

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



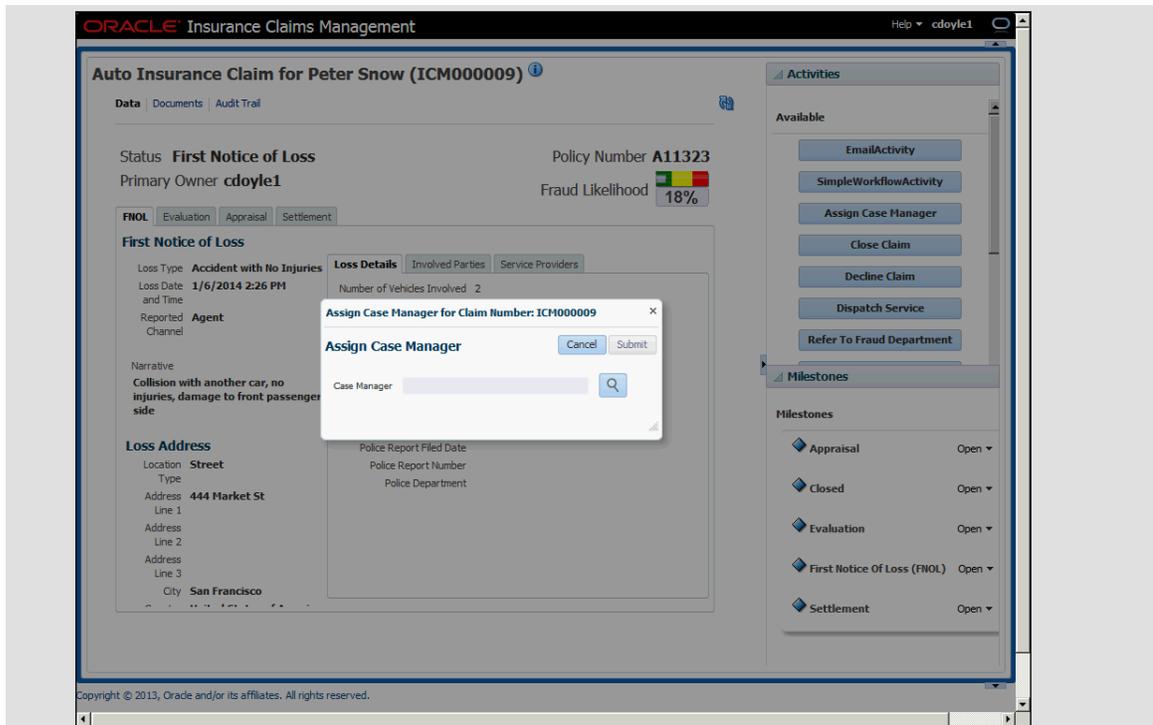
- Depending on your role, the **Assign** button displays the role of the next responsible person.

If you are a customer service representative, you can assign a claim to a case manager.

If you are a case manager, you can assign a claim to a field adjuster.

Click the **Assign Case Manager** button.

- Use the **Assign role for Claim Number: *number*** dialog box to assign the claim to the next responsible person.



4. Click the **Search** button.
5. Search for the person you want to assign the claim to. In this example, the person is selected for you.
Click the **OK** button.
6. Click the **Submit** button.
7. The claim is now assigned to the case manager. As the claim is assigned to a new person, the **Primary Owner** field is updated with the new person's name.
8. As the claim moves through the process, the **Status** field is updated.
9. Once the activities within the FNOL phase are complete, the **FNOL** milestone is set to completed.
10. You have completed the **Assigning a Claim to Other Personnel** topic.

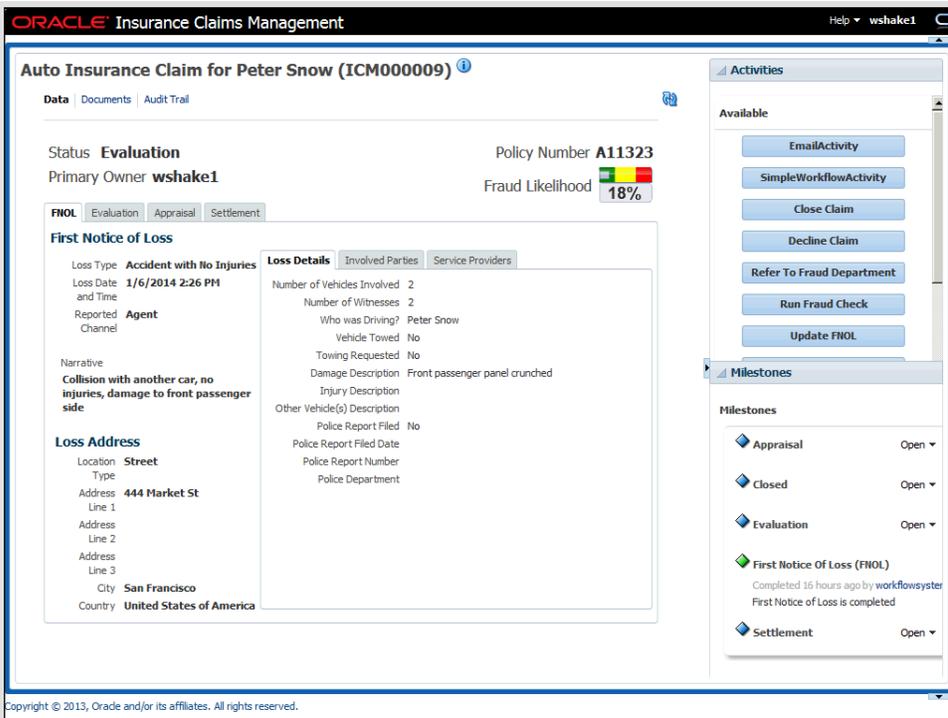
Validating a Claim

As a case manager, you evaluate whether a claim is valid and if it can be fast tracked. If the claim is valid, then you validate it. Oracle ICM uses the Evaluate for Fast Track Ruleset to determine if the claim can be fast tracked.

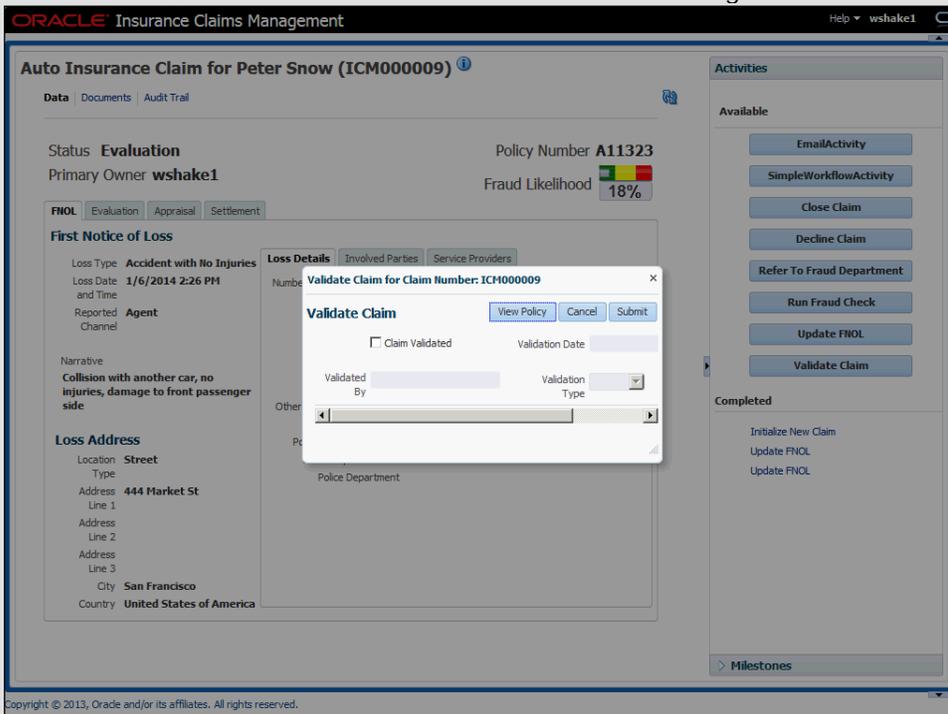
In this topic, you will validate a claim, and evaluate it for fast track.

Procedure: Validating a Claim

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Close the **Milestones** pane to view the available activities.
Click the **Milestones** pane.
3. Review the claim. If the claim is valid, then validate the claim.
Click the **Validate Claim** button.
4. Use the **Validate Claim for Claim Number: *number*** dialog box to validate the claim.



5. Click the **Claim Validated** option.
6. The **Verification Date**, **Verified By**, and **Verification Type** fields populate once the **Claim Validated** option is checked.
7. Click the **Submit** button.
8. The claim is now validated.
9. Next, you can evaluate the claim for fast track. Oracle ICM uses the Evaluate for Fast Track Ruleset to determine if the claim can be fast tracked.

Click the **Evaluate For Fast Track** button.

10. Use the **Evaluate for Fast Track for Claim Number: *number*** dialog box to evaluate a claim for fast track.

The screenshot displays the Oracle Insurance Claims Management application. The main window shows the 'Auto Insurance Claim for Peter Snow (ICM000009)' with the status 'Evaluation'. Key details include Policy Number A11323, Primary Owner wshake1, and a Fraud Likelihood of 18%. The 'First Notice of Loss' section contains the following information:

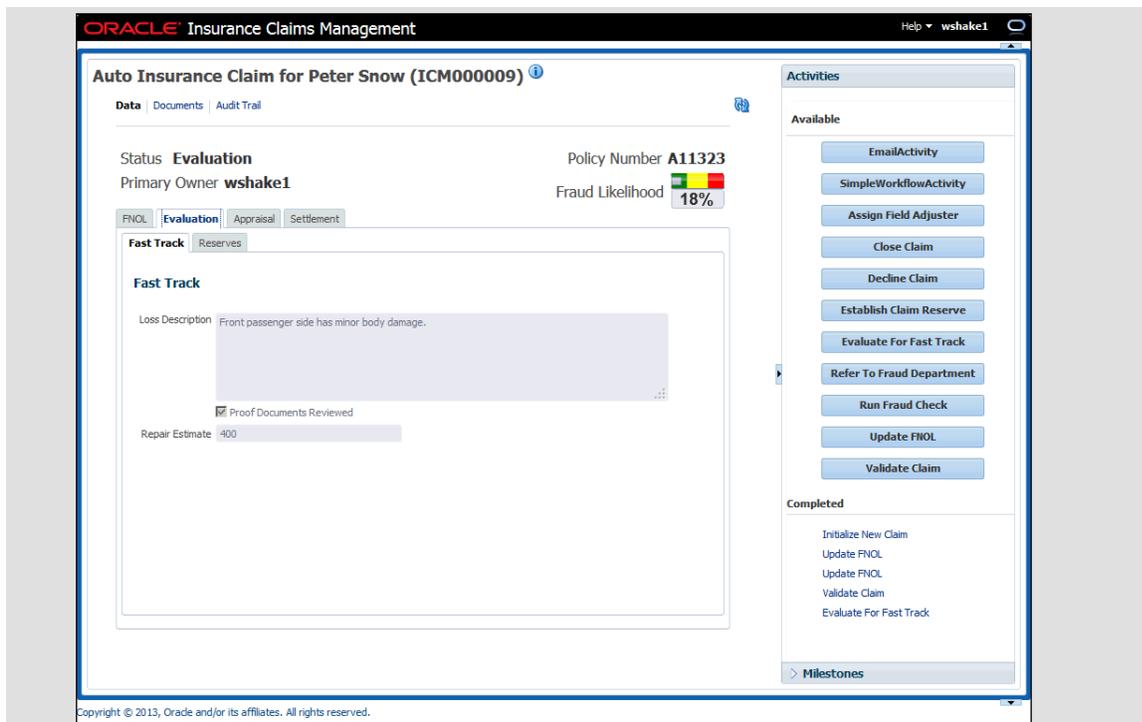
- Loss Type: Accident with No Injuries
- Loss Date and Time: 1/6/2014 2:26 PM
- Reported Channel: Agent
- Narrative: Collision with another car, no injuries, damage to front passenger side
- Loss Address: 444 Market St, San Francisco, United States of America

An 'Evaluate for Fast Track' dialog box is open in the foreground, containing the following fields:

- Loss Description (text area)
- Proof Documents Reviewed
- Repair Estimate (text field)
- Comments (text area)

The dialog box has 'Cancel' and 'Submit' buttons. The background interface also shows a list of activities on the right side, including 'EmailActivity', 'SimpleWorkflowActivity', 'Assign Field Adjuster', 'Close Claim', 'Decline Claim', 'Establish Claim Reserve', 'Evaluate For Fast Track', 'Refer To Fraud Department', 'Run Fraud Check', 'Update FNOL', and 'Validate Claim'.

11. Complete the fields as necessary. In this example, the fields have been completed for you.
- Click the **Submit** button.
12. The claim has now been evaluated for fast track.
13. Click the **Evaluation** tab.
14. Use the **Evaluation** tab to see what was entered when the Evaluate for Fast Track activity was performed.



15. Click the **Claim Summary** icon.
16. Use the **Claim Summary For *number*** dialog box to see if the claim is available for fast track.
17. This claim is eligible for fast track.
18. You have completed the **Validating a Claim** topic.

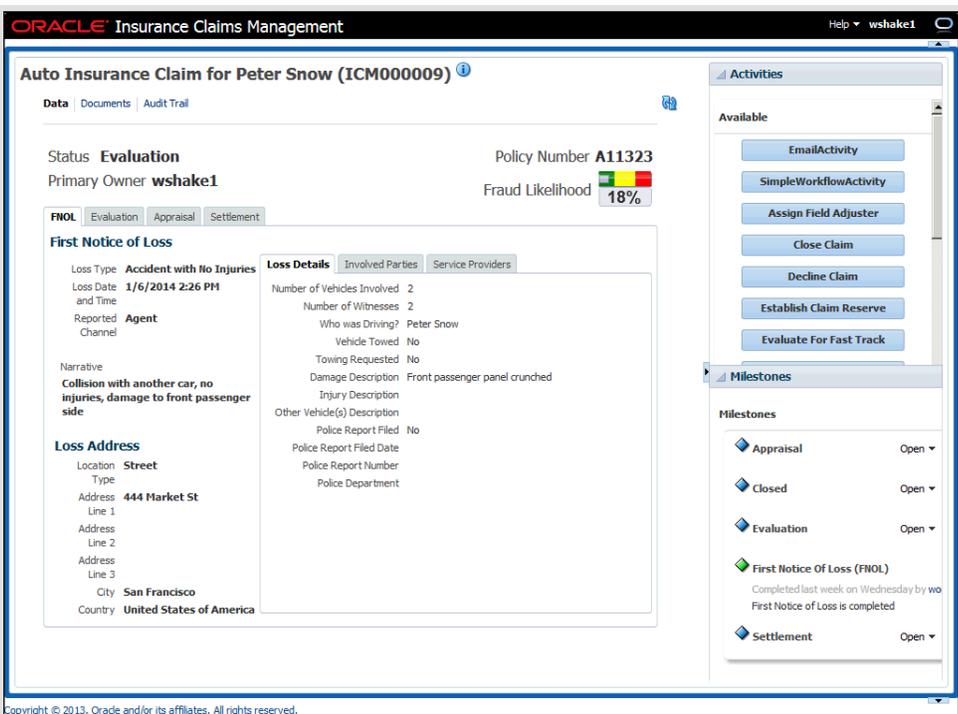
Establishing a Claim Reserve

As a case manager, you establish claim reserves for both fast track and regular claims.

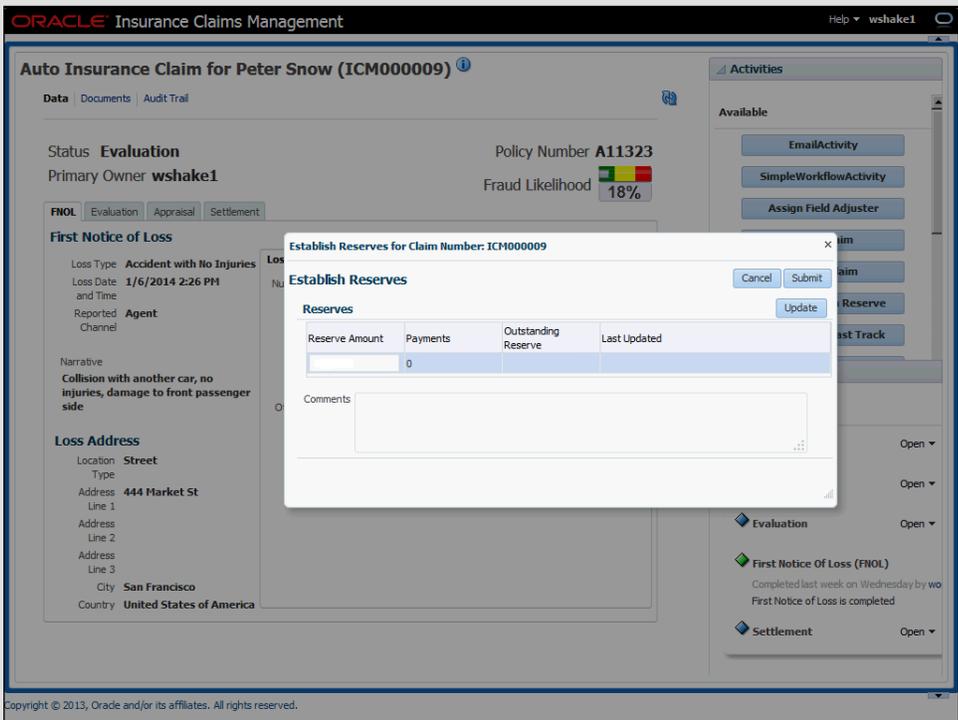
In this topic, you will establish a claim reserve.

Procedure: Establishing a Claim Reserve

1. Use the **Auto Insurance Claim for *Name (number)*** page to perform activities on the claim.



2. Click the **Establish Claim Reserve** button.
3. Use the **Establish Reserves for Claim Number: *number*** dialog box to set the reserve amount for a claim.



4. Click in the **Reserve Amount** field.
5. Enter the desired information into the **Reserve Amount** field. Enter "**1000.00**".
6. Click the **Submit** button.

7. Close the **Milestones** pane to view the completed activities to validate the claim reserve task is complete.

Click the **Milestones** pane.
8. A claim reserve is now established.
9. You have completed the **Establishing a Claim Reserve** topic.

Initiating a Fast Track Settlement

As a case manager, you can initiate a fast track settlement if the claim is available for fast track.

In this topic, you will initiate a fast track settlement.

Procedure: Initiating a Fast Track Settlement

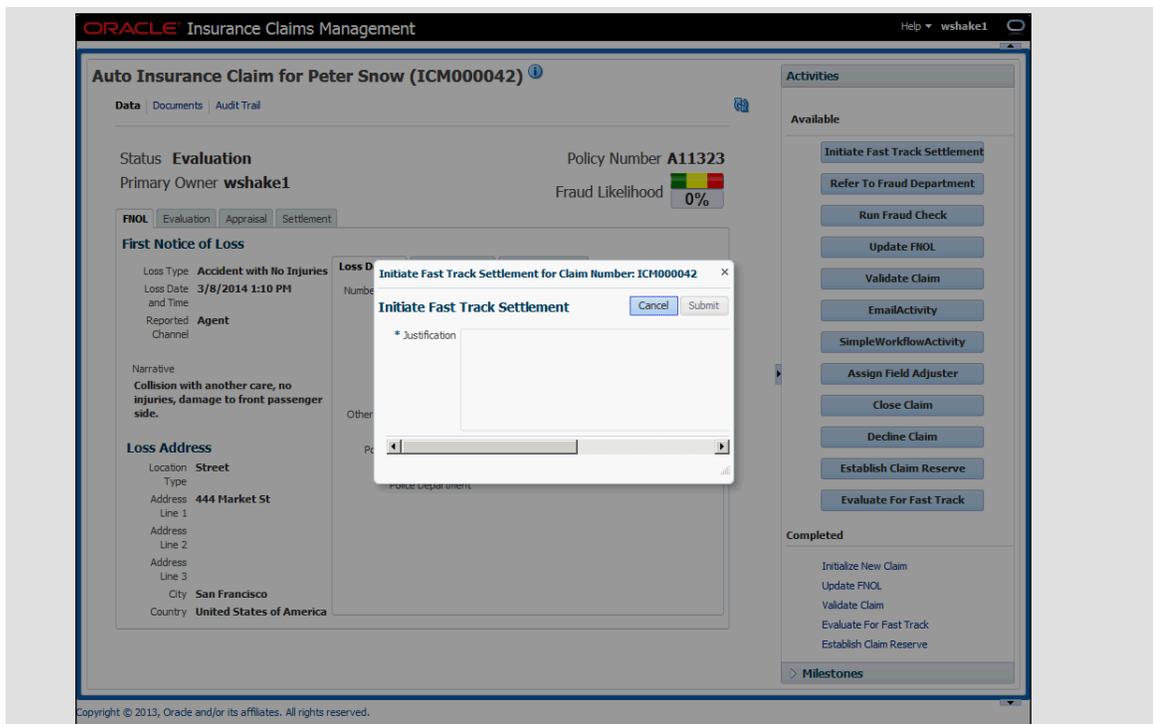
1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

The screenshot displays the Oracle Insurance Claims Management web application. The main header shows the claim title "Auto Insurance Claim for Peter Snow (ICM000042)" and the status "Evaluation". Key information includes the Policy Number "A11323" and a Fraud Likelihood of "0%". The "First Notice of Loss" section provides details such as the loss date (3/8/2014 1:10 PM), agent channel, and a narrative describing a collision with another car. The "Loss Address" is listed as 444 Market St, San Francisco, CA. The "Loss Details" section includes information about the number of vehicles and witnesses involved, and the damage description. On the right side, an "Activities" pane lists various actions available for this claim, including "Initiate Fast Track Settlement", "Refer To Fraud Department", "Run Fraud Check", "Update FNOL", "Validate Claim", "EmailActivity", "SimpleWorkflowActivity", "Assign Field Adjuster", "Close Claim", "Decline Claim", "Establish Claim Reserve", and "Evaluate For Fast Track".

2. If the claim is not eligible for fast track, the Initiate Fast Track Settlement button is not visible. This claim is available for fast track.

Click the **Initiate Fast Track Settlement** button.

3. Use the **Initiate Fast Track Settlement for Claim Number: number** dialog box to initiate a fast track settlement.



4. Click in the **Justification** field.
5. Enter the desired information into the **Justification** field. Enter "**Damage and repair costs are within reason**".
6. Click the **Submit** button.
7. Fast track for this claim is now initiated.
8. As the claim moves through the process, the **Status** field is updated from Evaluation to Settlement. When a claim is set for fast track, it skips the Appraisal phase.
9. You have completed the **Initiating a Fast Track Settlement** topic.

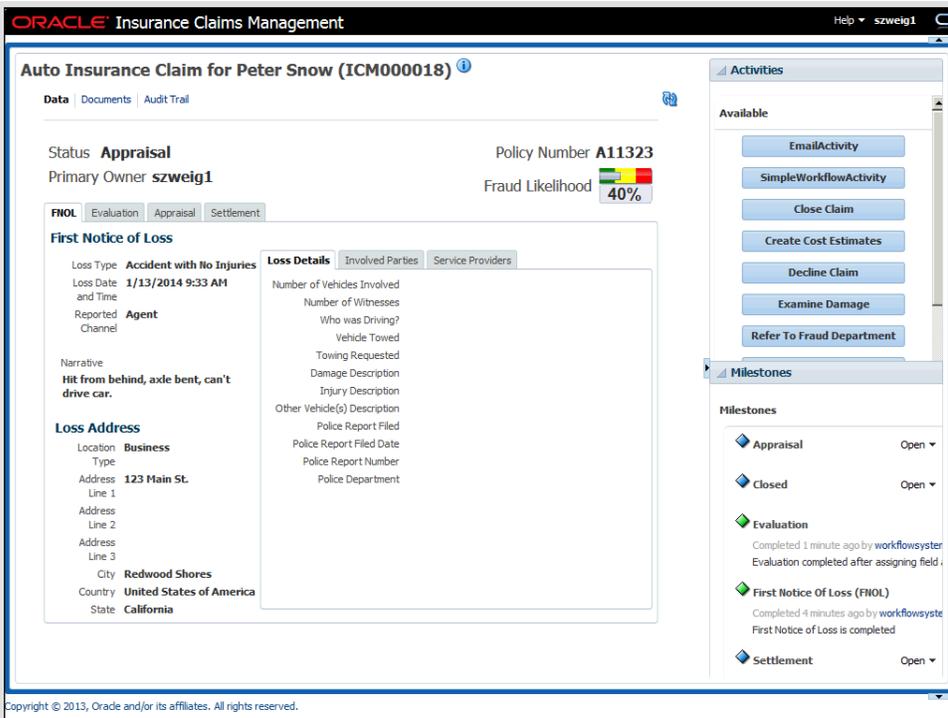
Submitting an Appraisal

The case manager assigns you, the field adjuster, to a claim. You determine if you must physically examine the damage, then you document the damages, create cost estimates, and submit an appraisal.

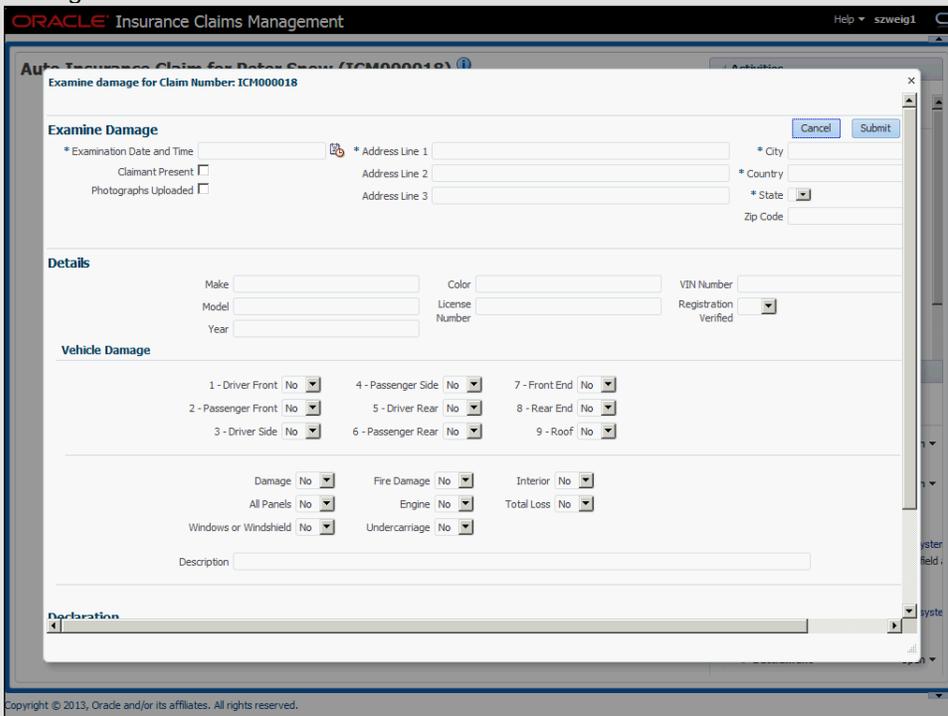
In this topic, you document the damage, create cost estimates, and submit an appraisal.

Procedure: Submitting an Appraisal

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

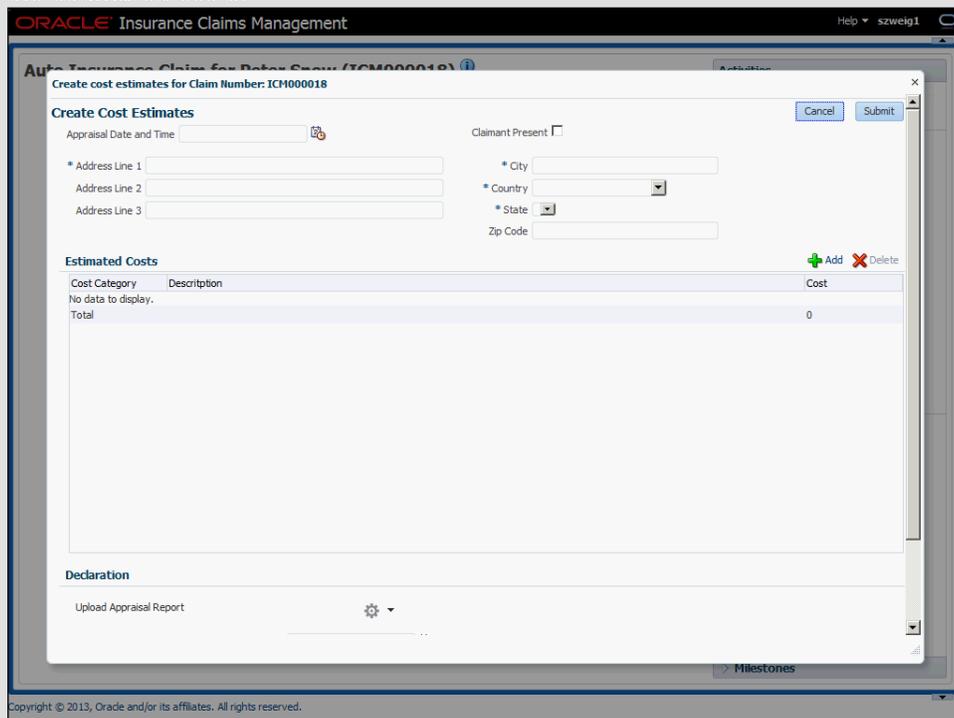


2. Click the **Examine Damage** button.
3. Use the **Examine Damage for Claim Number: *number*** dialog box to document the damage to the claimant's vehicle.



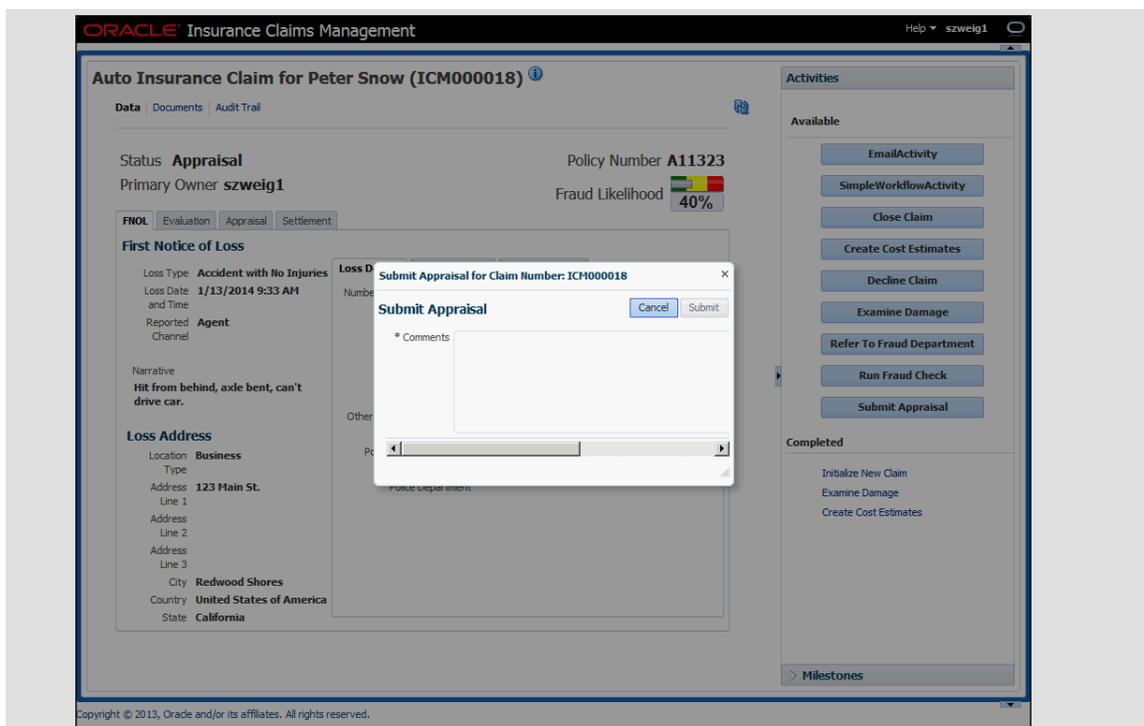
4. Complete the fields as necessary, documenting the damage to the vehicle. In this example, the fields have been completed for you.
5. Click the **vertical** scrollbar.

6. You must declare when your examination is complete.
Click the **Examination Complete** option.
7. The **Completion Date** field populates once the **Examination Complete** field is checked.
8. Click the **vertical** scrollbar.
9. Click the **Submit** button.
10. Close the **Milestones** pane to view the available activities.
Click the **Milestones** pane.
11. Next, create the cost estimates.
Click the **Create Cost Estimates** button.
12. Use the **Create cost estimates for Claim Number: *number*** dialog box to document the estimated costs.



13. Complete the fields as necessary. In this example, the fields have been completed for you.
14. Add your cost estimates.
Click the **Add** button.
15. Click an entry in the row.
16. Click the **Cost Category** list.
17. Click the **Labor** list item.
18. Click in the **Description** field.

19. Enter the desired information into the **Description** field. Enter "**Labor to fix axle**".
20. Click in the **Cost** field.
21. Enter the desired information into the **Cost** field. Enter "**800**".
22. Add all remaining cost estimates. In this example, estimates have been added for you.
23. Click the **vertical** scrollbar.
24. Attach your appraisal report and declare the appraisal complete.
Click the **Settings** list.
25. Click the **Upload File** list item.
26. Use the **Upload File** dialog box to attach your appraisal to the claim.
27. In this example, the file has been selected for you.
Click the **OK** button.
28. Click the **Appraisal Complete** option.
29. The **Completion Date** field populates once the **Appraisal Complete** field is checked.
30. Click the **vertical** scrollbar.
31. Click the **Submit** button.
32. Finally, submit your appraisal.
Click the **Submit Appraisal** button.
33. Use the **Submit Appraisal for Claim Number: *number*** dialog box to document your comments for the appraisal.



34. Click in the **Comments** field.
35. Enter the desired information into the **Comments** field. Enter "**Appraisal completed. See attached report.**".
36. Click the **Submit** button.
37. The **Completed** pane shows that you have completed the Examine Damage, Create Cost Estimates, and Submit Appraisal activities.
38. As the claim moves through the process, the **Status** field is updated.
39. Click the **Appraisal** tab.
40. Use the **Appraisal** tab to see the documented damage and cost estimates.
41. Open the **Milestones** pane to see that the claim moved to the next milestone.
Click the **Milestones** pane.
42. Once the activities within the Appraisal phase are complete, the **Appraisal** milestone is set to completed.
43. You have completed the **Submitting an Appraisal** topic.

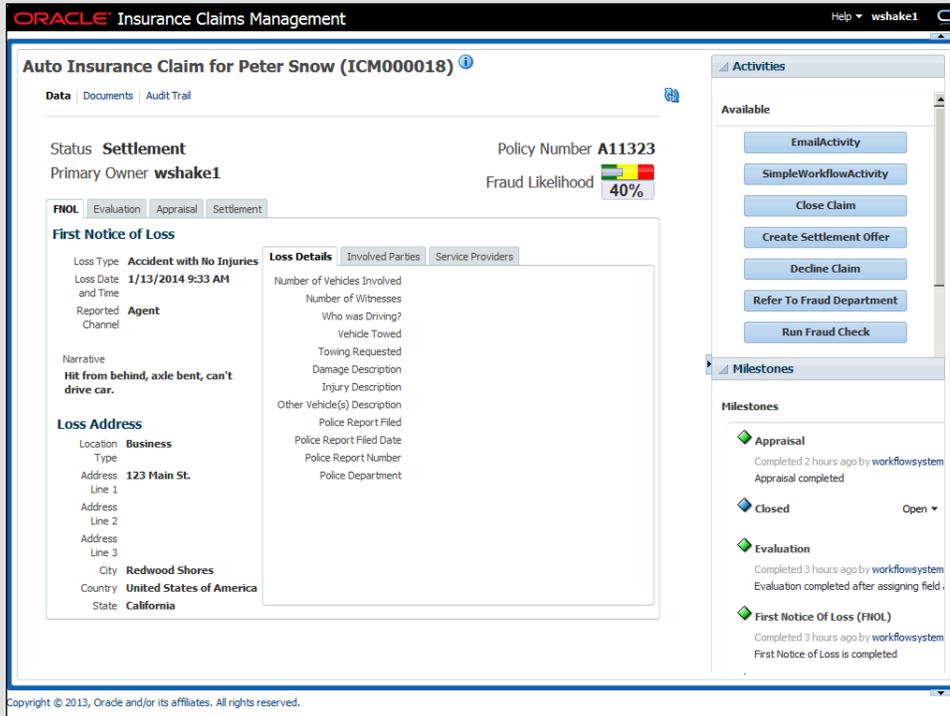
Creating a Settlement Offer

As a case manager, you create the settlement offer and present it to the claimant.

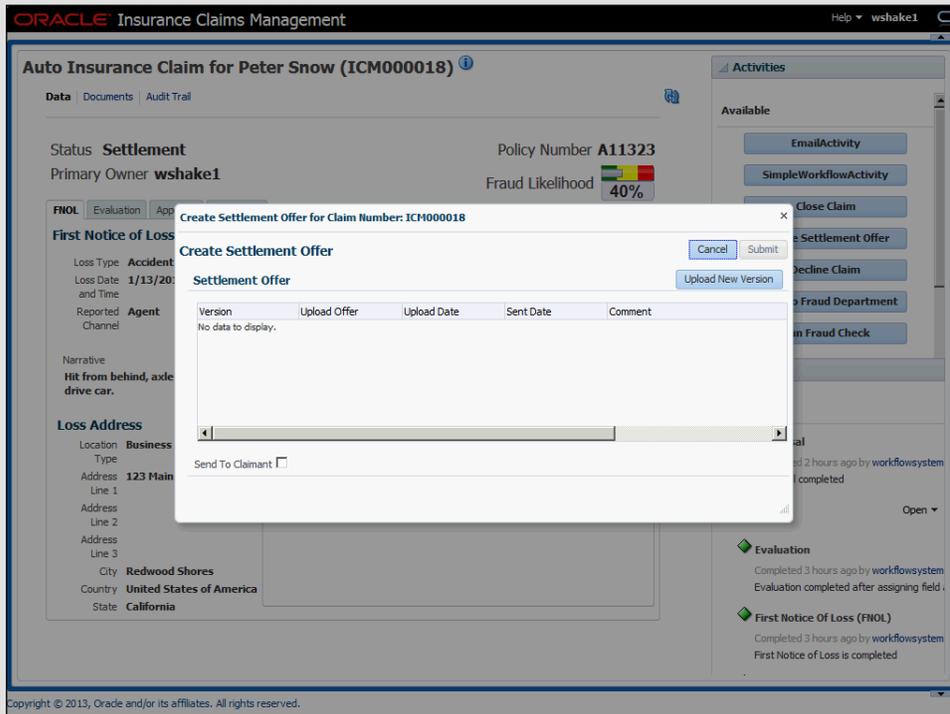
In this topic, you will create the settlement offer.

Procedure: Creating a Settlement Offer

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Create Settlement Offer** button.
3. Use the **Create Settlement Offer for Claim Number: number** dialog box to attach the settlement offer to the claim.



4. Click the **Upload New Version** button.
5. The **Version** field populates with the version number.
6. Click the **Settings** list.
7. Click the **Upload File** list item.
8. Use the **Upload File** dialog box to attach the settlement offer to the claim.
9. In this example, the file has been selected for you.

Click the **OK** button.
10. Complete the remaining fields. Check the **Send To Claimant** option to notify the claimant that an offer is ready. The settlement offer document will be included. In this example, the fields have been completed for you.
11. Click the **Submit** button.
12. Click the **Settlement** tab.
13. Use the **Settlement** tab to see if a settlement offer has been submitted. You can also see if a payment has been made on the claim.

Auto Insurance Claim for Peter Snow (ICM000018)

Status **Settlement** Policy Number **A11323**
 Primary Owner **wshake1** Fraud Likelihood **40%**

Offers | Payments

Version	Upload Offer	Upload Date	Sent Date	Comment
1	psnowsettlementoffe	1/28/2014	1/28/2014	

Activities

Available

- EmailActivity
- SimpleWorkflowActivity
- Close Claim
- Create Settlement Offer
- Decline Claim
- Refer To Fraud Department
- Run Fraud Check

Milestones

Milestones

- Appraisal**
Completed 2 hours ago by workflowsystem
Appraisal completed
- Closed** Open ▾
- Evaluation**
Completed 3 hours ago by workflowsystem
Evaluation completed after assigning field.
- First Notice Of Loss (FNOL)**
Completed 3 hours ago by workflowsystem
First Notice of Loss is completed

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14. You have completed the **Creating a Settlement Offer** topic.

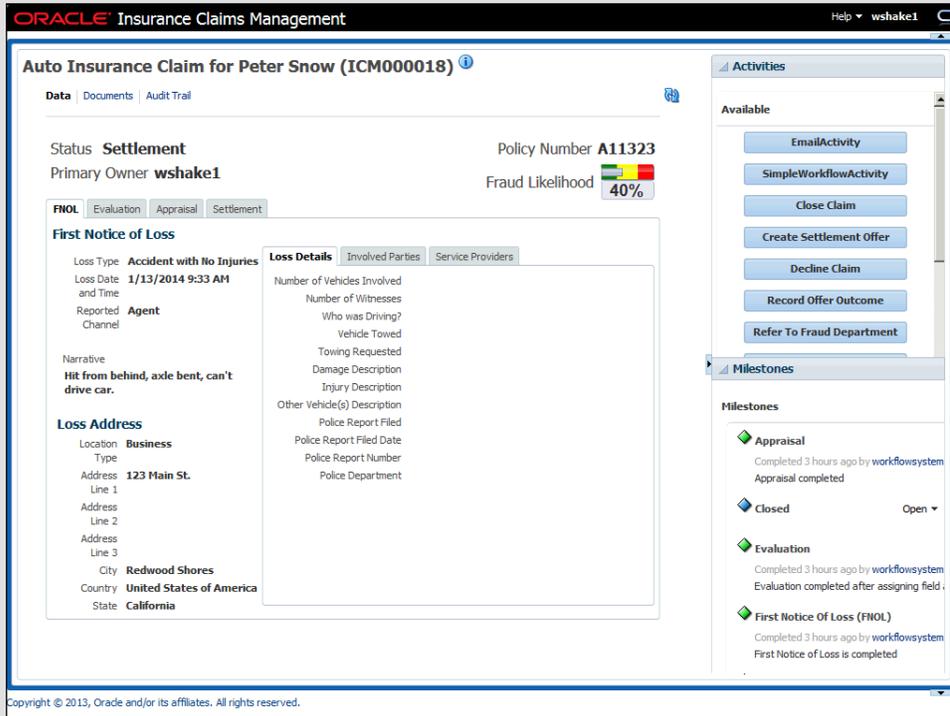
Recording the Offer Outcome

As a case manager, you record the responses to the settlement offers.

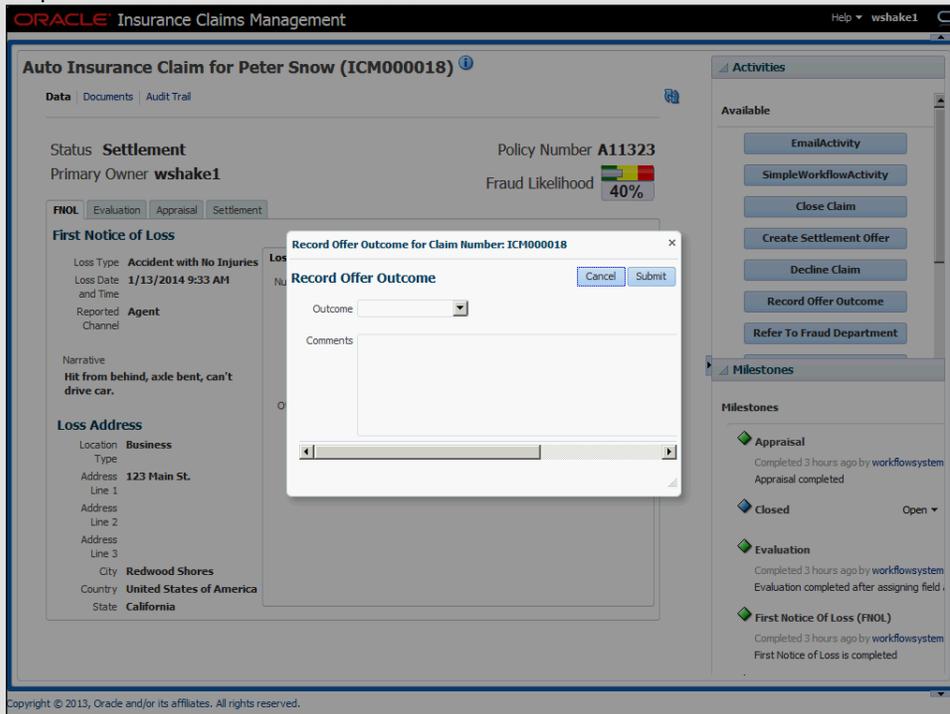
In this topic, you will record the offer outcome.

Procedure: Recording the Offer Outcome

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Record Offer Outcome** button.
3. Use the **Record Offer Outcome for Claim Number: number** dialog box to record the responses to the settlement offers.



4. Click the **Outcome** list.
5. Click the **Offer Accepted** list item.
6. Click the **Submit** button.
7. Close the **Milestones** pane to view the completed activities.
Click the **Milestones** pane.
8. The offer outcome is now recorded.
9. You have completed the **Recording the Offer Outcome** topic.

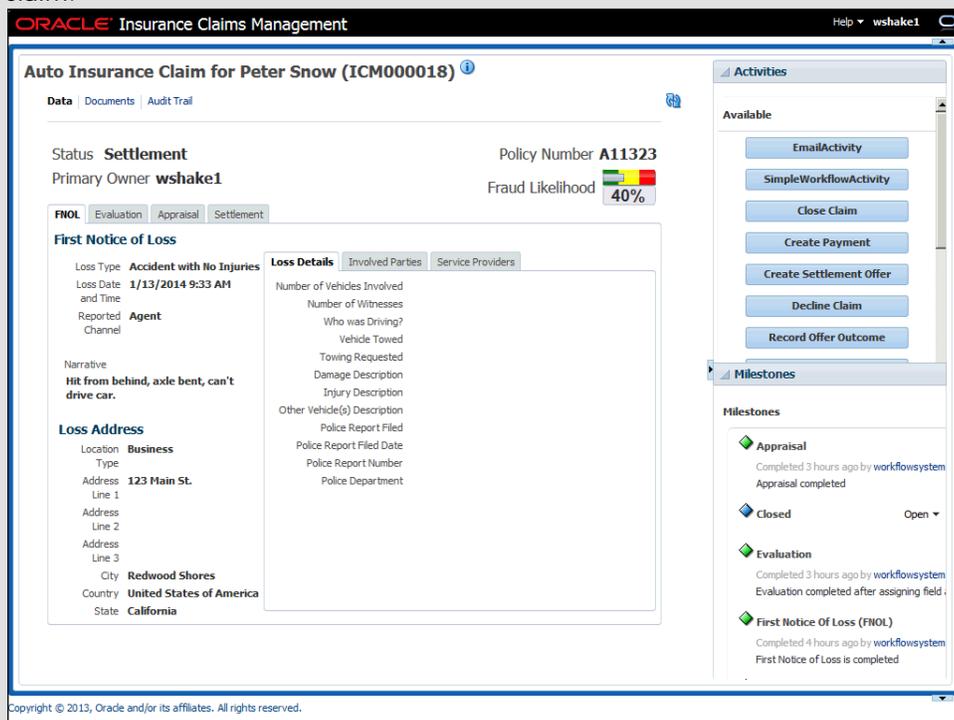
Creating Settlement Payments

As a case manager, you create and send any payments due to the parties involved in the claim.

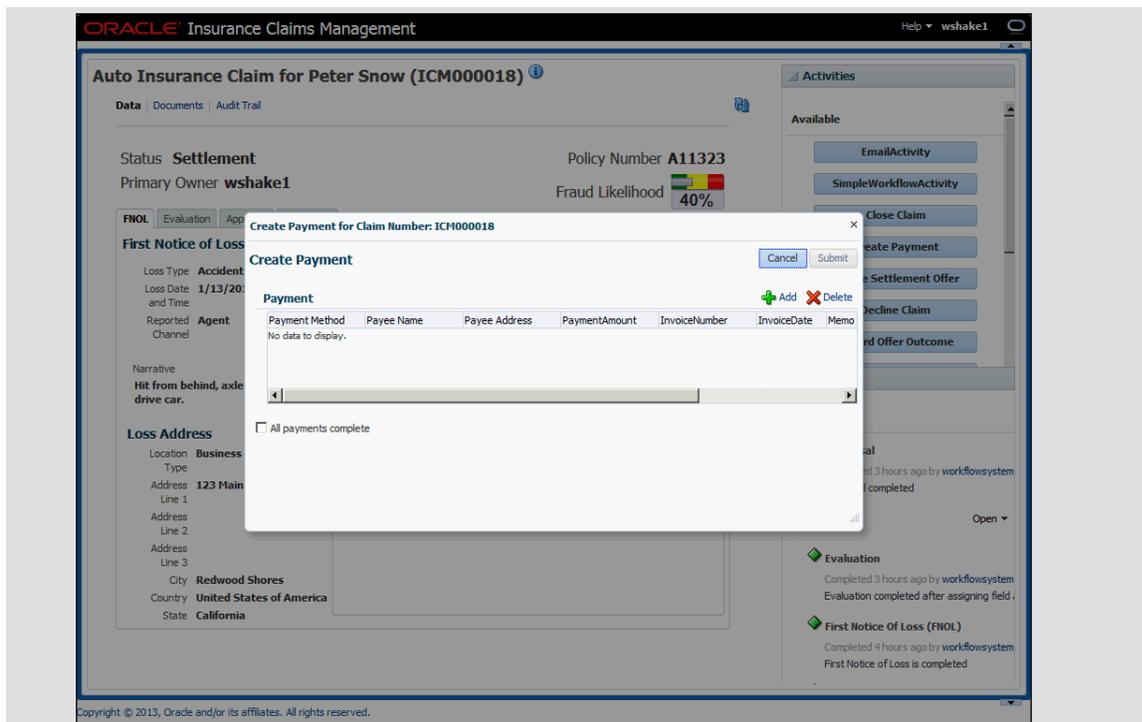
In this topic, you will create a settlement payment.

Procedure: Creating Settlement Payments

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Create Payment** button.
3. Use the **Create Payment for Claim Number: number** dialog box to record the payments submitted to the involved parties.



4. Click the **Add** button.
5. Click an entry in the row.
6. Click the **Payment Method** list.
7. Click the **Check** list item.
8. Click the **horizontal** scrollbar.
9. Complete the remaining fields as necessary. Multiple payments can be added to a claim. Check the **All payments complete** option when the final payment is made. In this example, the fields have been completed for you.
10. Click the **Submit** button.
11. Click the **Settlement** tab.
12. Click the **Payments** tab.
13. Use the **Payments** tab to see what payments have been made on the claim.

ORACLE Insurance Claims Management

Auto Insurance Claim for Peter Snow (ICM000018)

Data Documents Audit Trail

Status **Settlement** Policy Number **A11323**
 Primary Owner **wshake1** Fraud Likelihood **40%**

FNOL Evaluation Appraisal **Settlement**

Offers **Payments**

Payments

Payment Method	Payee Name	Payee Address	PaymentAmount	InvoiceNumber	InvoiceDate
Check	Peter Snow	401 Island Parkway	3000	ICM_INVOICE_2	1/28/2014

All payments complete

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Activities

Available

- EmailActivity
- SimpleWorkflowActivity
- Close Claim
- Create Payment
- Create Settlement Offer
- Decline Claim
- Record Offer Outcome

Milestones

Milestones

- Appraisal**
Completed 3 hours ago by workflowsystem
Appraisal completed
- Closed** Open
- Evaluation**
Completed 3 hours ago by workflowsystem
Evaluation completed after assigning field.
- First Notice Of Loss (FNOL)**
Completed 4 hours ago by workflowsystem
First Notice of Loss is completed

14. You have completed the **Creating Settlement Payments** topic.

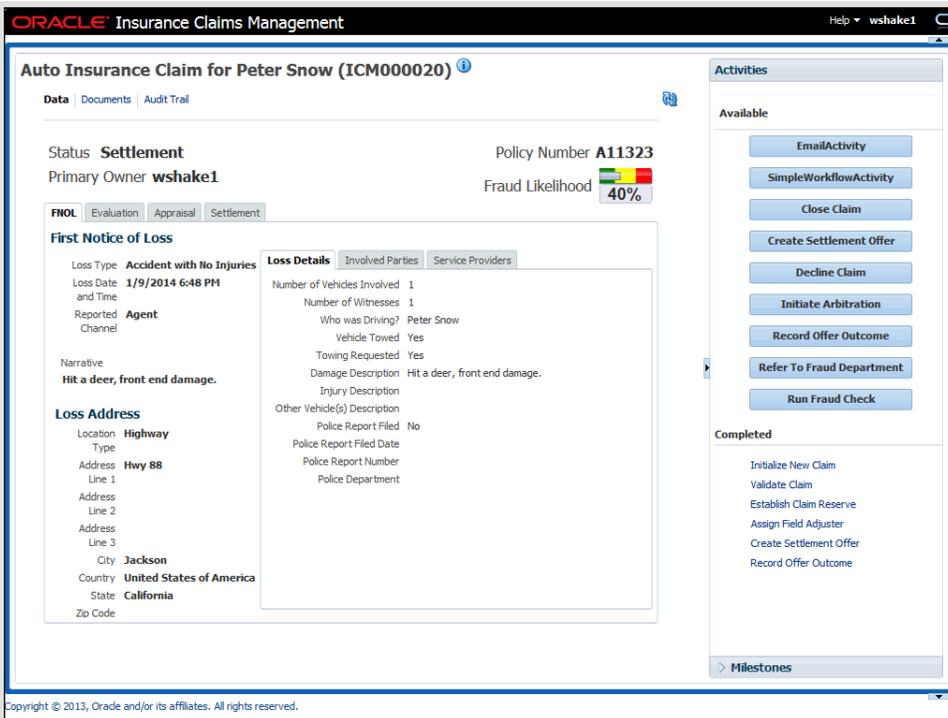
Initiating Arbitration

A claimant does not always accept the settlement offered. If this occurs, you as the case manager, initiate arbitration.

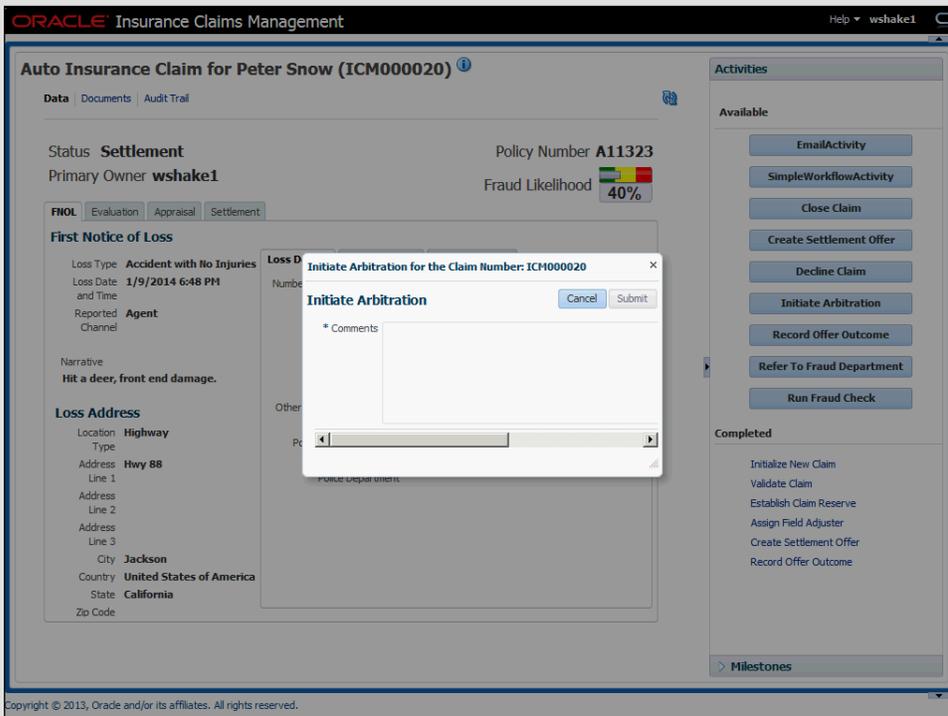
In this topic, you will initiate arbitration.

Procedure: Initiating Arbitration

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Initiate Arbitration** button.
3. Use the **Initiate Arbitration for Claim Number: *number*** dialog box to initiate arbitration.



4. Click in the **Comments** field.
5. Enter the desired information into the **Comments** field. Enter "**Mediator contacted to arbitrate claim.**".

6. Click the **Submit** button.
7. Arbitration is now initiated for this claim.
8. As the claim moves through the process, the **Status** field is updated.
9. You have completed the **Initiating Arbitration** topic.

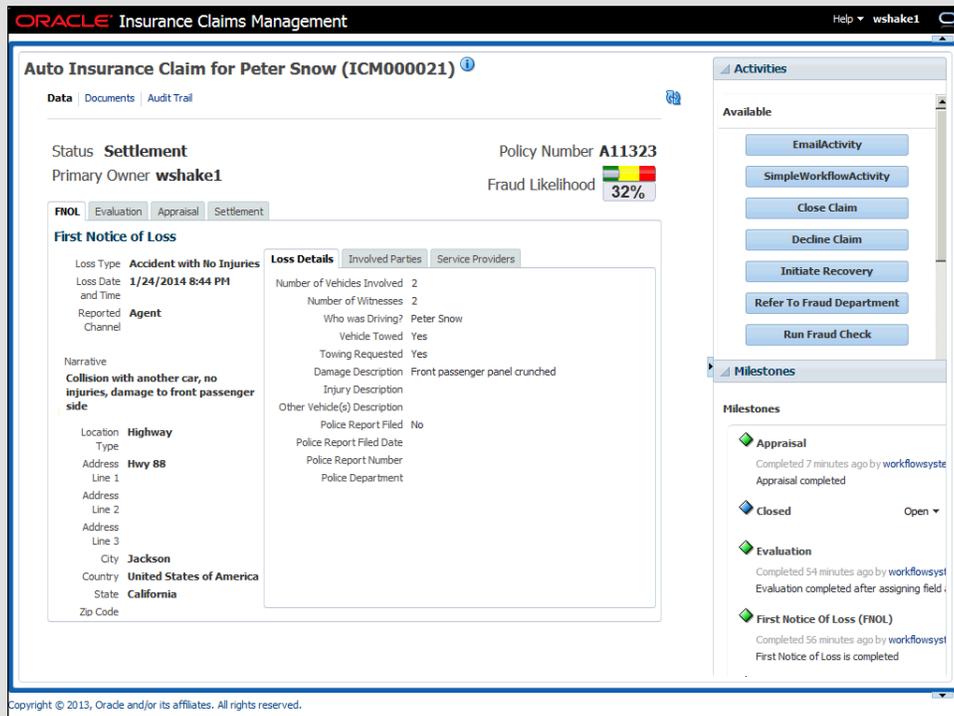
Initiating Recovery

Your claimant was not responsible for the accident. As a case manager, you can initiate recovery from the insurance company of the party at fault.

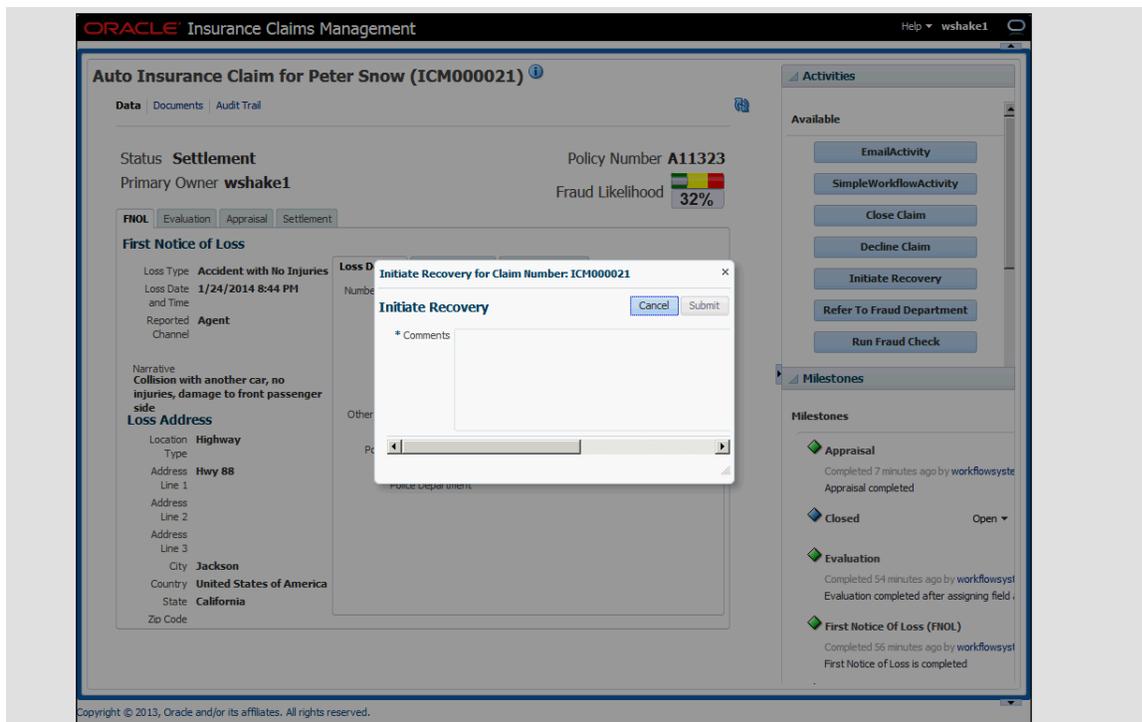
In this topic, you will initiate the recovery process.

Procedure: Initiating Recovery

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Initiate Recovery** button.
3. Use the **Initiate Recovery for Claim Number: number** dialog box to initiate recovery.



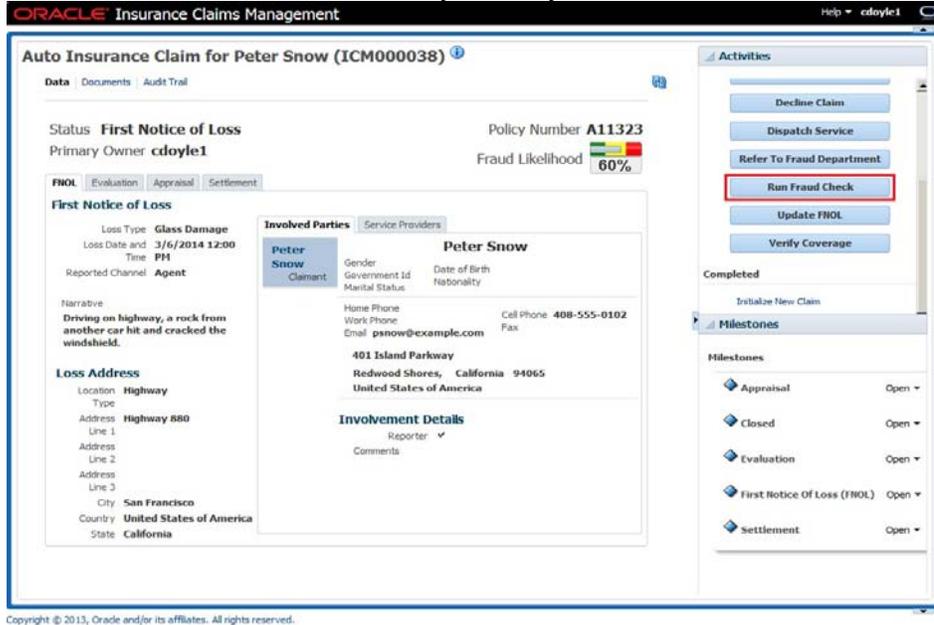
4. Click in the **Comments** field.
5. Enter the desired information into the **Comments** field. Enter "**Contacted other insurance.**".
6. Click the **Submit** button.
7. Close the **Milestones** pane to view the completed activities.
Click the **Milestones** pane.
8. Recovery is now initiated for this claim.
9. As the claim moves through the process, the **Status** field is updated.
10. You have completed the **Initiating Recovery** topic.

Run Fraud Check

Any role can run a fraud check if they suspect the claim is fraudulent. Oracle Insurance Claim Management by default uses the Determine Fraud Likelihood Percentage Ruleset to determine the likelihood of fraud. If Oracle ICM is configured with R based predictive analytics, then the predictive model is used to determine the likelihood of fraud. Contact your system administrator to understand how your environment is configured.

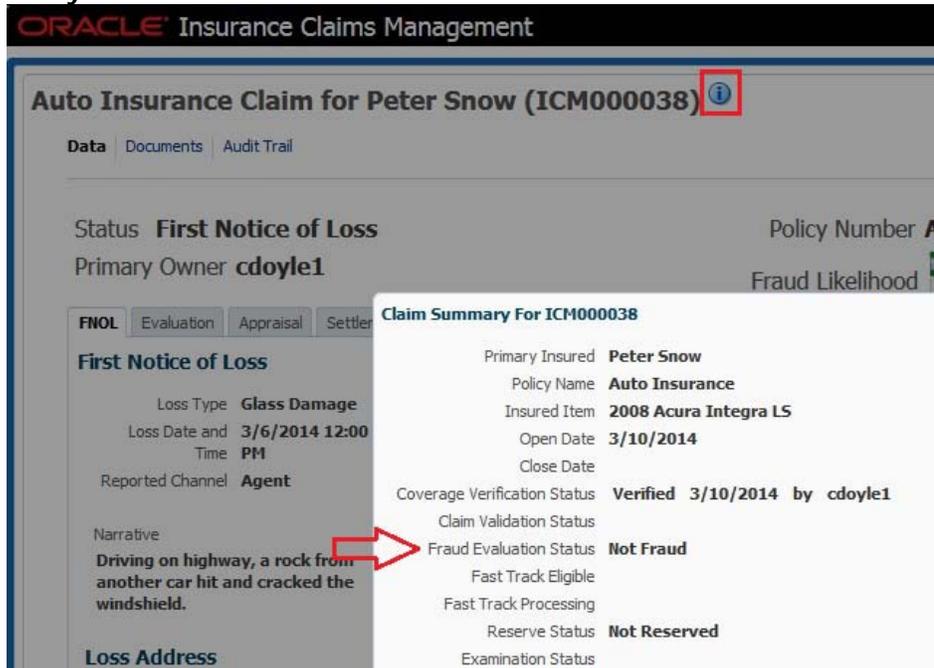
To run a fraud check, click **Run Fraud Check** from the Auto Insurance Claim for Name (number) UI. See the Auto Insurance Claim for *Name (number)* UI diagram.

Auto Insurance Claim for *Name (number)* UI



To determine the results of the fraud check, click **Information** on the Auto Insurance Claim for *Name (number)* page. The Claim Summary For *number* dialog box displays with claim details. Review the **Fraud Evaluation Status** field to see the fraud check results. See the Verify Fraud Check diagram.

Verify Fraud Check



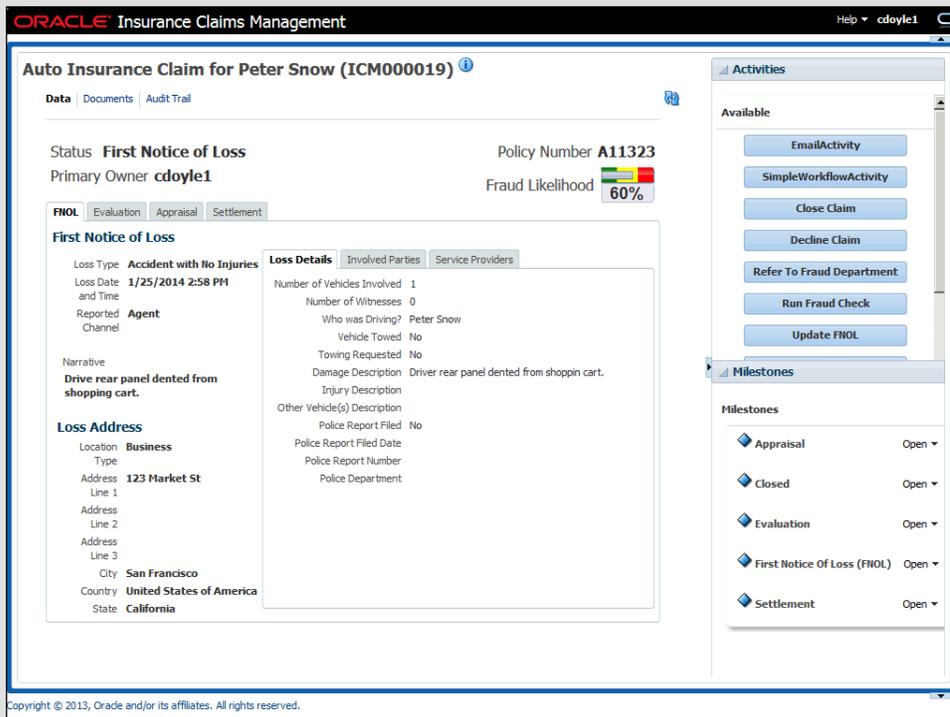
Refer a Claim to the Fraud Department

Any role can refer a claim to the Fraud Department if they suspect the claim is fraudulent.

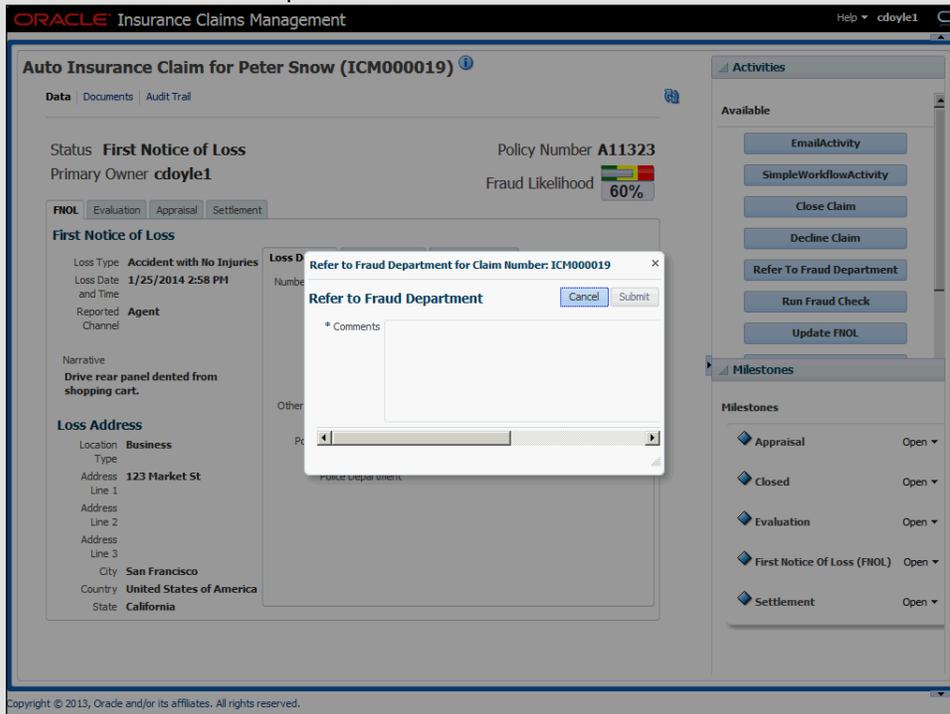
In this topic, you will refer a claim to the Fraud Department.

Procedure: Refer a Claim to the Fraud Department

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Refer To Fraud Department** button.
3. Use the Refer to **Fraud Department for Claim Number: number** dialog box to submit a claim to the Fraud Department.



4. Click in the **Comments** field.
5. Enter the desired information into the **Comments** field. Enter "**Please investigate. The photo showing the damage looks suspicious.**".
6. Click the **Submit** button.
7. Close the **Milestones** pane to view the completed activities.
Click the **Milestones** pane.
8. The claim has now been referred to the Fraud Department.
9. As the claim moves through the process, the **Status** field is updated.
10. You have completed the **Refer a Claim to the Fraud Department** topic.

Recording Fraud Review Status

As a fraud investigator, you record the outcome of your fraud claim review.

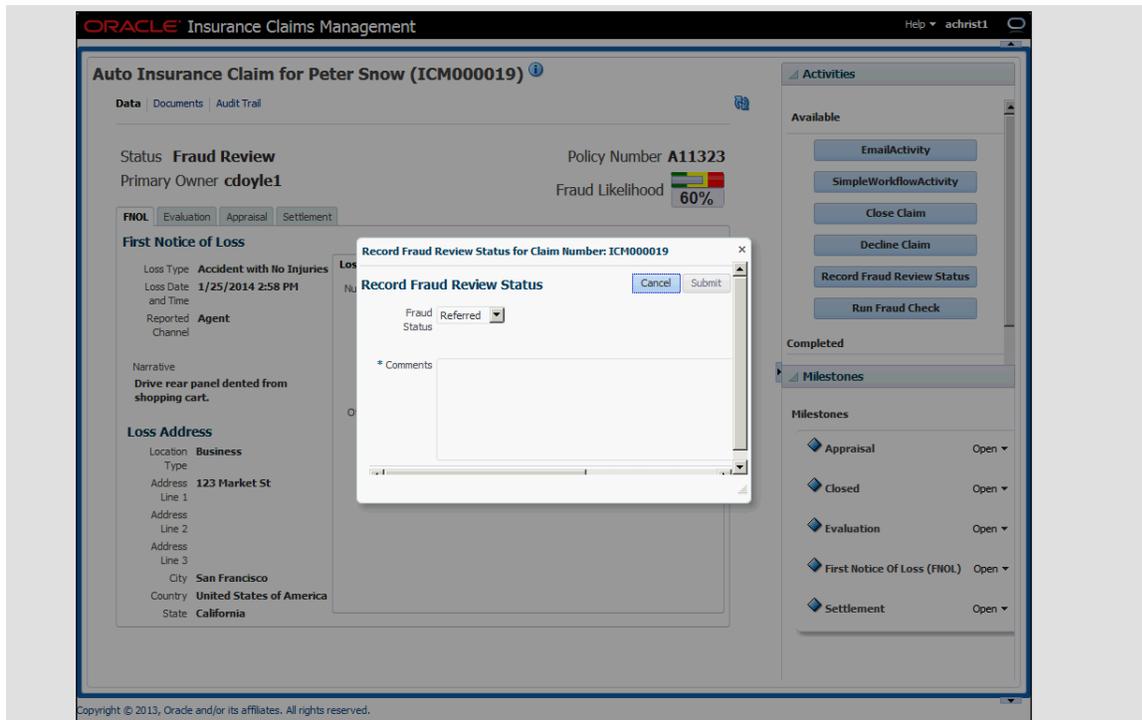
In this topic, you will record the fraud status for a claim.

Procedure: Recording Fraud Review Status

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

The screenshot shows the Oracle Insurance Claims Management interface for a claim titled "Auto Insurance Claim for Peter Snow (ICM000019)". The status is "Fraud Review" and the policy number is "A11323". The fraud likelihood is shown as 60%. The "First Notice of Loss" (FNOL) section indicates an "Accident with No Injuries" on 1/25/2014 at 2:58 PM, with a narrative stating "Drive rear panel dented from shopping cart." The loss address is in San Francisco, California. The "Loss Details" section shows 1 vehicle involved and 0 witnesses. The "Involved Parties" section lists Peter Snow as the driver. The "Service Providers" section shows no police reports filed. On the right, the "Activities" pane lists available actions, including "Record Fraud Review Status". The "Milestones" pane shows a list of milestones: Appraisal, Closed, Evaluation, First Notice Of Loss (FNOL), and Settlement, all with an "Open" status.

2. Click the **Record Fraud Review Status** button.
3. Use the **Record Fraud Review Status for Claim Number: number** dialog box to record your fraud review status.



4. Click the **Fraud Status** list.
5. Click the **Fraud** list item.
6. Click in the **Comments** field.
7. Enter the desired information into the **Comments** field. Enter "**Claim is fraudulent. Looks like a baseball bat created the damage.**".
8. Click the **Submit** button.
9. Close the **Milestones** pane to view the completed activities.
Click the **Milestones** pane.
10. The fraud review status is now recorded.
11. You have completed the **Recording Fraud Review Status** topic.

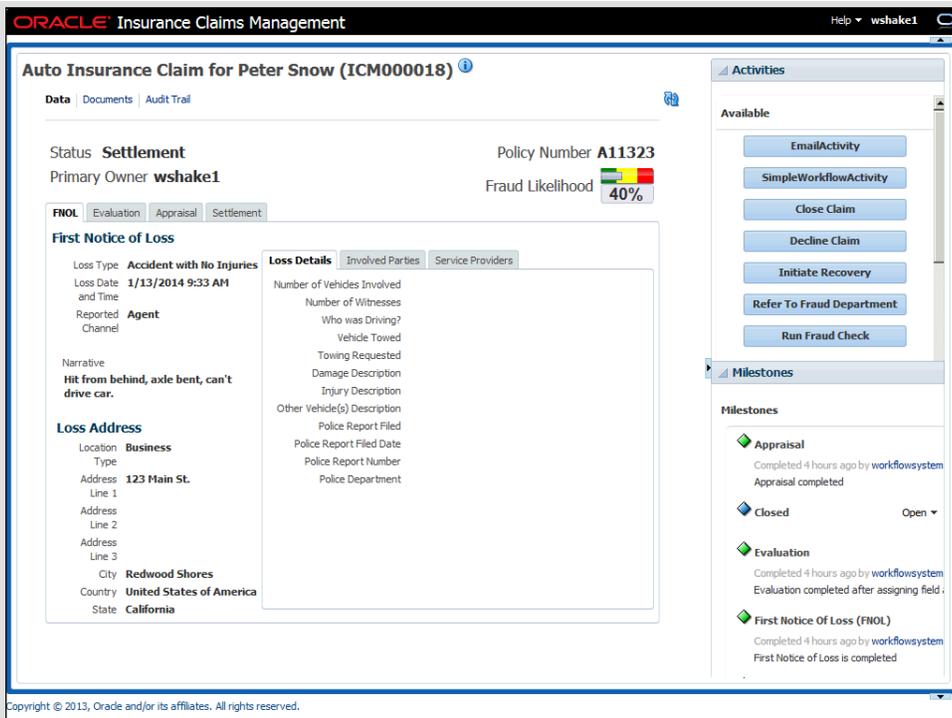
Closing a Claim

Any role can close a claim at any time, provided the claim is not already closed.

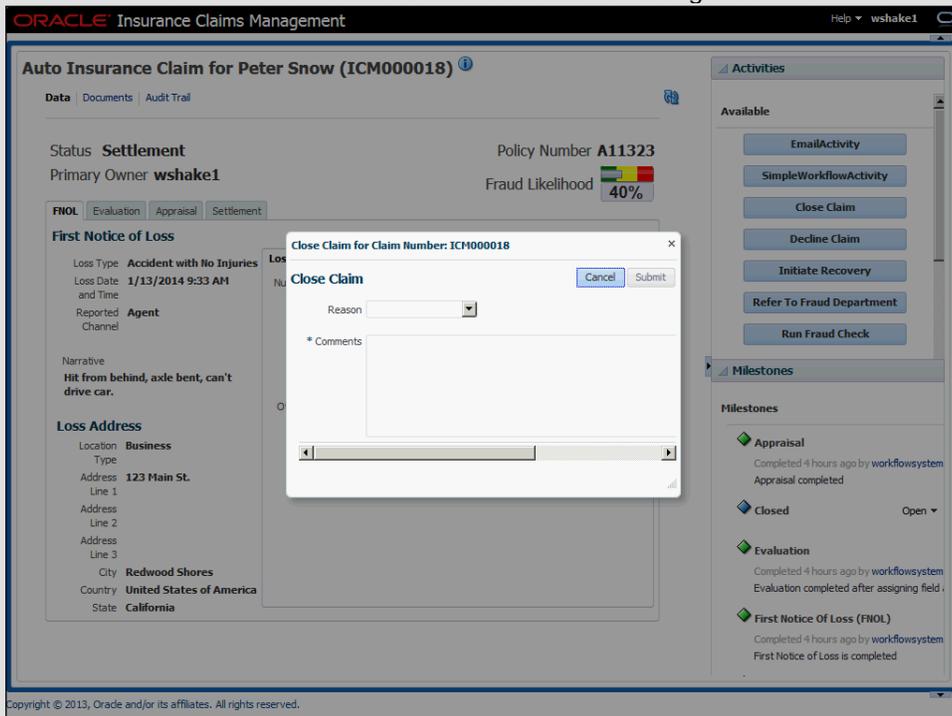
In this topic, you will close a claim.

Procedure: Closing a Claim

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.



2. Click the **Close Claim** button.
3. Use the **Close Claim for Claim Number: *number*** dialog box to close the claim.



4. Click the **Reason** list.
5. Click the **Paid** list item.
6. Click in the **Comments** field.

7. Enter the desired information into the **Comments** field. Enter "**Claim settled and all payments sent.**".
8. Click the **Submit** button.
9. As the claim moves through the process, the **Status** field is updated.
10. Once the claim is closed, the **Closed** milestones is set to closed.
11. You have completed the **Closing a Claim** topic.

Declining a Claim

Any role can decline a claim if they find something wrong.

In this topic, you will decline a claim.

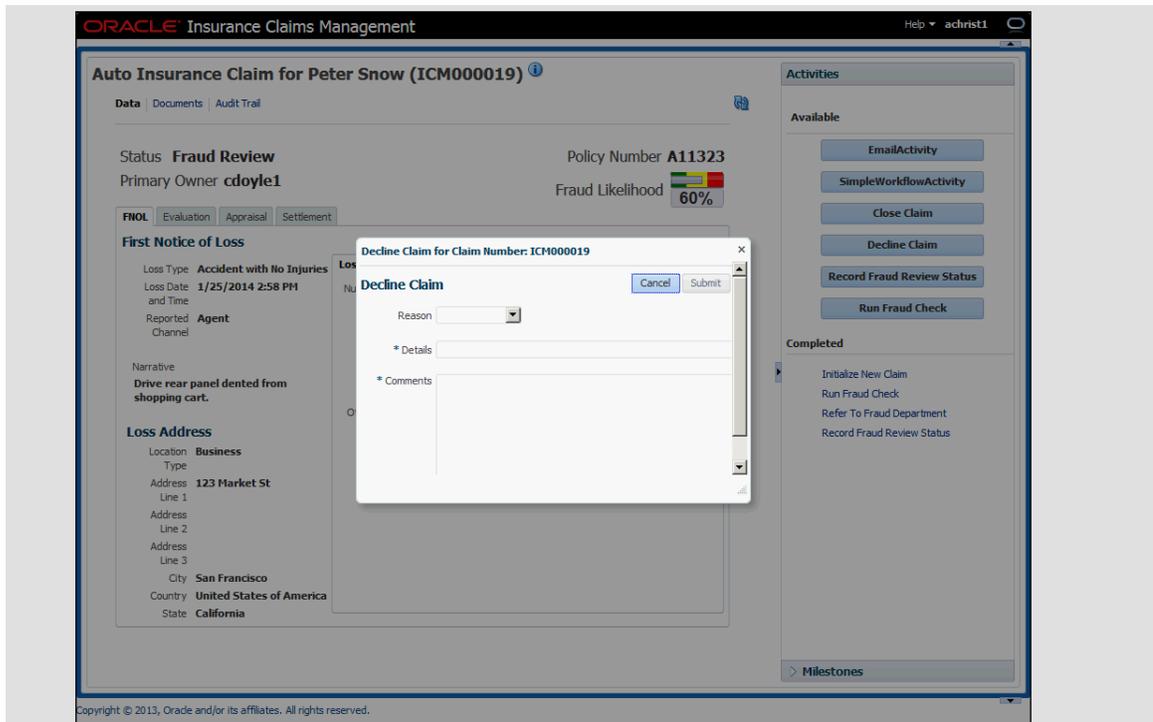
Procedure: Declining a Claim

1. Use the **Auto Insurance Claim for Name (number)** page to perform activities on the claim.

The screenshot displays the Oracle Insurance Claims Management interface for an Auto Insurance Claim for Peter Snow (ICM000019). The interface is divided into several sections:

- Header:** Oracle Insurance Claims Management, Help, adchrist1
- Claim Title:** Auto Insurance Claim for Peter Snow (ICM000019)
- Navigation:** Data, Documents, Audit Trail
- Status:** Fraud Review
- Policy Number:** A11323
- Primary Owner:** cdoyle1
- Fraud Likelihood:** 60%
- Loss Details:** FNOL, Evaluation, Appraisal, Settlement
- Loss Information:**
 - Loss Type: Accident with No Injuries
 - Loss Date and Time: 1/25/2014 2:58 PM
 - Reported Channel: Agent
 - Narrative: Drive rear panel dented from shopping cart.
 - Loss Address: Business, 123 Market St, San Francisco, United States of America, California
- Loss Details:**
 - Number of Vehicles Involved: 1
 - Number of Witnesses: 0
 - Who was Driving?: Peter Snow
 - Vehicle Towed: No
 - Towing Requested: No
 - Damage Description: Driver rear panel dented from shopping cart.
 - Injury Description:
 - Other Vehicle(s) Description:
 - Police Report Filed: No
 - Police Report Filed Date:
 - Police Report Number:
 - Police Department:
- Activities:**
 - Available: EmailActivity, SimpleWorkflowActivity, Close Claim, Decline Claim, Record Fraud Review Status, Run Fraud Check
 - Completed: Initialize New Claim, Run Fraud Check, Refer To Fraud Department, Record Fraud Review Status
 - Milestones

2. Click the **Decline Claim** button.
3. Use the **Decline Claim for Claim Number: number** dialog box to decline the claim.



4. Click the **Reason** list.
5. Click the **Fraud** list item.
6. Click in the **Details** field.
7. Enter the desired information into the **Details** field. Enter "**Damage was a result of a baseball bat, not a shopping cart.**".
8. Click in the **Comments** field.
9. Enter the desired information into the **Comments** field. Enter "**Claimant notified claim is being denied.**".
10. Click the **Submit** button.
11. The claim is now declined.
12. As the claim moves through the process, the **Status** field is updated.
13. Open the **Milestones** pane to see that the claim moved to the next milestone.
Click the **Milestones** pane.
14. Once the claim is closed, the **Closed** milestone is set to closed.
15. You have completed the **Declining a Claim** topic.

Administering Oracle Insurance Claim Management

This section is for administrators who maintain Oracle Insurance Claim Management (ICM). Use Oracle ICM as delivered or modify it to meet your requirements. This section covers the data elements you can modify.

Upon completion of this section, you will be able to:

- Maintain the seeded data.
- Describe the Determine Fraud Likelihood Percentage Ruleset.
- Describe the Fast Track Eligibility Ruleset.
- Describe the Insurance Claim Management Rules Ruleset.

Maintaining the Seeded Data

Oracle ICM ships with seeded data for the drop-down lists. This section covers the seeded data you can modify.

Upon completion of this section, you will be able to:

- Maintain lookup types.
- Maintain assets.
- Maintain policies.
- Maintain service providers.

Maintaining Lookup Types

Lookup type codes specify values used in claims. Oracle Insurance Claim Management ships with seeded values for lookup type codes. The seeded values are:

Appraisal Status

- Completed
- In Progress

Asset Type

- Electronics
- Vehicle

Claim Status

- Appraisal
- Arbitration
- Closed
- Evaluation
- First Notice of Loss
- Fraud Review
- Recovery

- Settlement

Claim Validation Status

- Not Validated
- Validated

Claim Validation Type

- Manual

Closure Reason

- Declined
- Duplicate
- In Error
- Paid
- Recovery Complete

Cost Category Type

- Labor
- Miscellaneous
- Other
- Parts
- Replacement

Coverage Code Type

- Collision
- Comprehensive
- Towing

Coverage Verification Status

- Not Verified
- Verified

Coverage Verification Type

- Manual

Declined Reason

- Expired Policy
- Fraud
- No Coverage

Examination Status

- Completed
- In Progress

Fraud Evaluation Status

- Fraud
- Not Fraud
- Referred

Involvement Type

- Adverse Party
- Claimant
- Insurance Agent
- Lawyer
- Witness

Line of Business

- Auto

Location

- Business
- Highway
- Home
- Street

Loss Type

- Accident with Injuries
- Accident with No Injuries
- Fire Damage
- Glass Damage
- Theft

Payment Method

- Cash
- Check
- Wire Transfer

Policy Role Type

- Primary
- Secondary

Reporter Channel

- Agent
- Call Center
- Cell Phone
- Website

Reserve Status

- Not Reserved
- Reserved

Service Providers

- Car Rental Service
- Taxi Service
- Towing Service

Settlement Status

- Fully Paid
- Partially Paid
- Offer Accepted
- Offer Created
- Offer Negotiation
- Offer Not Accepted

Status

- Approve
- Reject

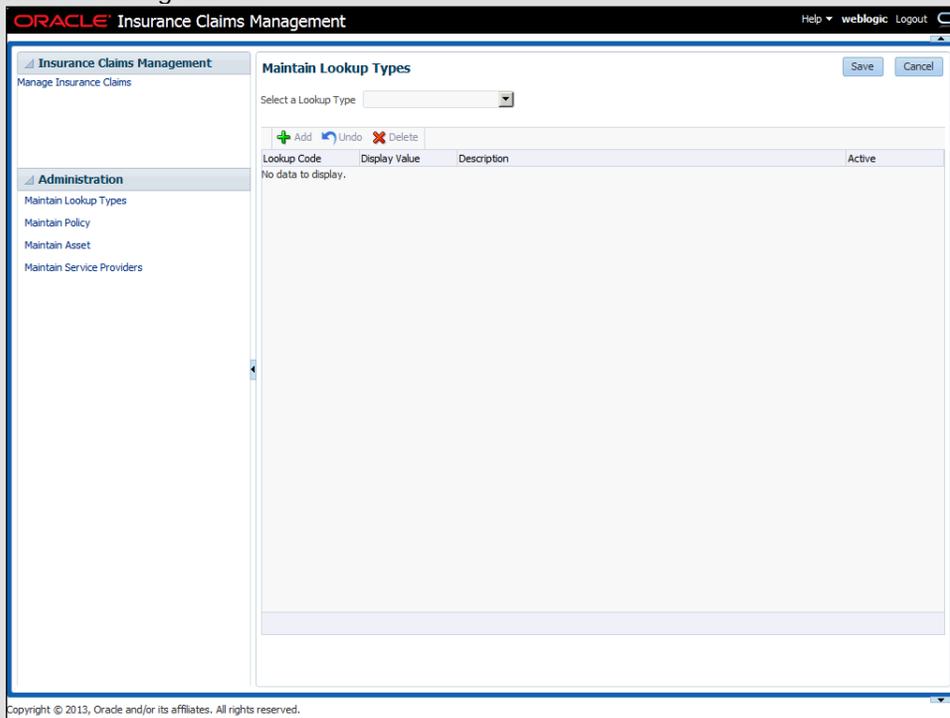
You can add additional lookup type codes to meet your organization's needs.

In this topic, you will modify lookup type code options.

Procedure: Maintaining Lookup Types

1. Click the [Links](#) link.
2. Click the [Manage Insurance Claims](#) link.
3. Click the [Maintain Lookup Types](#) link.

4. Use the **Maintain Lookup Types** page to modify the lookup type codes made available when creating claims.



5. Click the **Select a Lookup Type** list.
6. These are the lookup types shipped with Oracle ICM. You modify all lookup types using the same steps. In this topic, you will modify **Location**.

Click the **Location** list item.
7. First, add a lookup type code.

Click the **Add** button.
8. **Lookup Codes** are unique keys in the data tables and built into the logic of Oracle ICM.

Click in the **Lookup Code** field.
9. A **Lookup Code** can be upper or lower case.

Enter the desired information into the **Lookup Code** field. Enter "**PRK**".
10. Next, specify a short display value. Display values appear when a claim is created.

Click in the **Display Value** field.
11. Enter the desired information into the **Display Value** field. Enter "**Parking Lot**".
12. Use the **Description** field to add an optional description.

Click in the **Description** field.
13. Enter the desired information into the **Description** field. Enter "**Public Parking Lot**".
14. Saving the lookup type code makes it available when you create claims.

Click the **Save** button.

15. The lookup type code **PRK** is now added.

16. Next, modify the **PRK** lookup type code by editing the description.

Click in the **Description** field.

17. Enter the desired information into the field. Enter "**Parking Lot**".

18. You can reverse any modifications to a single selected row using the **Undo** button. To save the modification, you would click **Save** instead.

Click the **Undo** button.

19. There are two types of delete, a hard delete and soft delete.

A hard delete removes the lookup type code from the database table, provided it is not used in a claim.

First, perform a hard delete on the code **PRK**.

Click an entry in the row.

20. Click the **Delete** button.

21. Confirm that you want to delete the lookup type code.

Click the **Yes** button.

22. Click the **Save** button.

23. The lookup type code **PRK** is now deleted.

24. Click an entry in the row.

25. A soft delete inactivates a lookup type code already used in claims. Inactivated codes are not displayed as options for creating or updating claims.

Next, perform a soft delete on the **STR** code.

Click the **Active** option.

26. Click the **Save** button.

27. The lookup type code **STR** is now inactive.

28. You have completed the **Maintaining Lookup Types** topic.

Maintaining Assets

Oracle ICM enables you to add assets. You add these assets to a policy when you create the policy. Set up assets prior to creating policies and claims. Oracle Insurance Claim Management ships with sample data for assets. The sample data are:

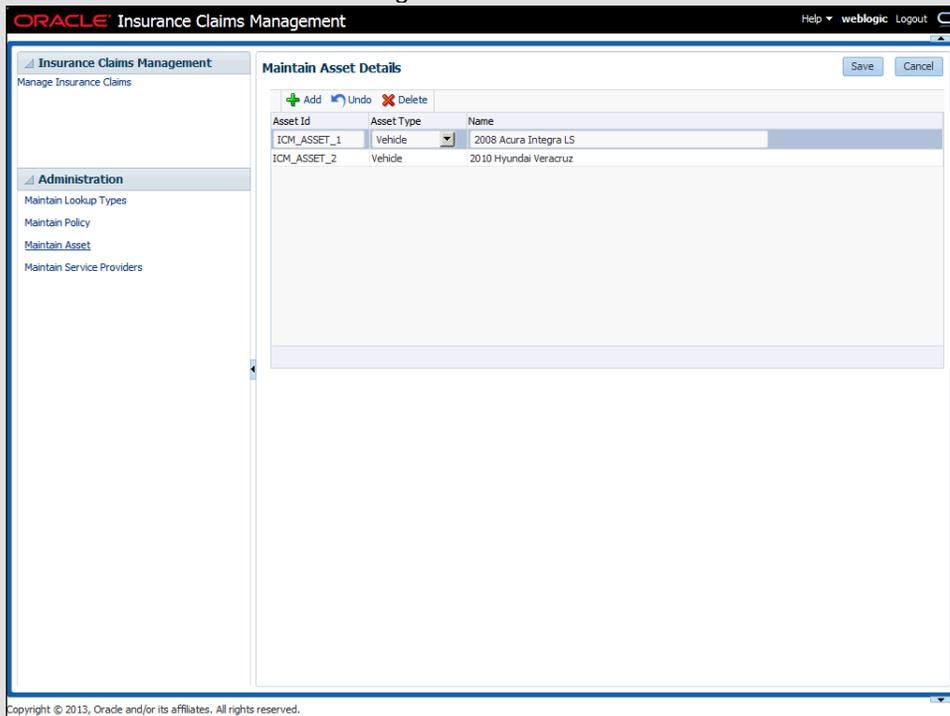
- 2008 Acura Integra LS
- 2010 Hyundai Veracruz

You must add assets that meet your organization's needs.

In this topic, you will modify assets.

Procedure: Maintaining Assets

1. Click the **Links** link.
2. Click the **Manage Insurance Claims** link.
3. Click the **Maintain Asset** link.
4. Use the **Maintain Asset Details** page to replace the sample data with your own. Assets are made available when creating claims.



5. First, add an asset.
Click the **Add** button.
6. The **Asset ID** field automatically populates.
7. Click the **Asset Type** list.
8. Click the **Vehicle** list item.
9. The asset name appears when used in a policy or claim.
Click in the **Name** field.
10. Enter the desired information into the **Name** field. Enter "**2013 Audi R8**".
11. Saving the asset makes it available when you create policies or claims.
Click the **Save** button.

12. The asset **2013 Audi R8** is now added.
13. Next, modify the **2013 Audi R8** asset by editing the name.
Click in the **Name** field.
14. Enter the desired information into the **Name** field. Enter "**2012 Audi R8**".
15. You can reverse any modifications to a single selected row using the **Undo** button. To save the modification, you would click **Save** instead.
Click the **Undo** button.
16. Delete the **2013 Audi R8** asset. Ensure the row you want to delete is selected.
Click an entry in the row.
17. Click the **Delete** button.
18. Confirm that you want to delete the asset.
Click the **Yes** button.
19. Click the **Save** button.
20. The asset **2013 Audi R8** is now deleted.
21. You have completed the **Maintaining Assets** topic.

Maintaining Policies

Oracle ICM enables you to add policy information such as: policy type, policyholder names, covered assets, and coverage type for your policy holders. Set up policies prior to creating claims. Oracle Insurance Claim Management ships with sample data for policies. The sample data are:

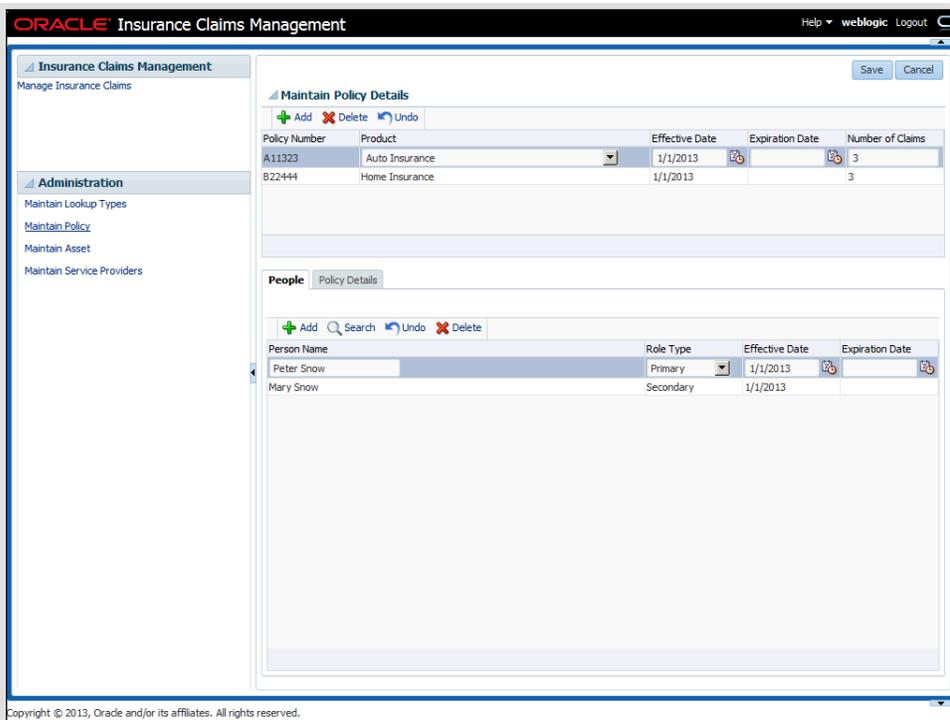
- Auto Insurance
- Home Insurance

You must add policies that meet your organization's needs.

In this topic, you will modify policies.

Procedure: Maintaining Policies

1. Click the **Links** link.
2. Click the **Manage Insurance Claims** link.
3. Click the **Maintain Policy** link.
4. Use the **Maintain Policy Details** page to replace the sample data with your own. Policies are made available when creating claims.



- Adding policies is a three phase process. You add the policy, then add the associated people and policy details. First, add a policy.

Click the **Add** button.

- Specify a policy number.

Enter the desired information into the **Policy Number** field. Enter "**C55678**".

- Click the **OK** button.

- Click the **Product** list.

- Click the **Auto Insurance** list item.

- Complete the remaining fields as necessary. In this example, the fields have been completed for you.

- Save the policy before adding people and policy details.

Click the **Save** button.

- Use the **People** tab to add all persons associated to the selected policy.

- Click the **Add** button.

- Use the **Enter the Person details** dialog box to add contact information for the insured party.

- Complete the fields as necessary. In this example, the fields have been completed for you.

- Click the **OK** button.

17. Complete the remaining fields as necessary. In this example, the fields have been completed for you.

18. Finally, add the policy details.

Click the **Policy Details** tab.

19. Use the **Policy Details** tab to add assets and coverage types covered by the policy.

The screenshot shows the Oracle Insurance Claims Management web application. The main window is titled "Insurance Claims Management" and has a "Maintain Policy Details" tab selected. The interface includes a sidebar with navigation options like "Administration", "Maintain Lookup Types", "Maintain Policy", "Maintain Asset", and "Maintain Service Providers". The main content area shows a table of existing policies and sections for adding assets and coverage types.

Policy Number	Product	Effective Date	Expiration Date	Number of Claims
C55678	Auto Insurance	12/2/2013	12/2/2014	0
A11323	Auto Insurance	1/1/2013		3
B22444	Home Insurance	1/1/2013		3

Below the table, there are two sections for adding new data:

- Add the assets covered by selected policy:** This section has a table with columns "Asset", "Effective Date", and "Expiration Date". It currently displays "No data to display."
- Add the coverage type for selected asset:** This section has a table with columns "Coverage", "Effective Date", and "Expiration Date". It also displays "No data to display."

At the bottom of the window, there is a copyright notice: "Copyright © 2013, Oracle and/or its affiliates. All rights reserved."

20. First, add all assets covered by the policy.

Click the **Add** button.

21. Complete the fields as necessary. In this example, the fields have been completed for you.

22. Add the coverage types for each asset.

Click the **Add** button.

23. Complete the fields as necessary. In this example, the fields have been completed for you.

24. Save the policy again to include the additional details.

Click the **Save** button.

25. The policy **C55678** is now added.

26. Next, modify the expiration date for the asset. You modify any aspect of a policy in a similar manner.

Click in the **Expiration Date** field.

27. Enter the desired information into the field. Enter "**12/4/2014**".

28. You can reverse any modifications to a single selected row using the **Undo** button. To save the modification, you would click **Save** instead.

Click the **Undo** button.

29. To delete a policy, you must first delete all associated people and policy details. Ensure the policy you want to delete is selected before removing the associated details. In this example, the policy has been selected.

Click the **People** tab.

30. Click an entry in the row.

31. Click the **Delete** button.

32. Confirm you want to delete **Blake Chen**.

Click the **Yes** button.

33. Click the **Policy Details** tab.

34. Click an entry in the row.

35. Click the **Delete** button.

36. Confirm you want to delete the coverage type.

Click the **Yes** button.

37. Next, delete the asset.

Click an entry in the row.

38. Click the **Delete** button.

39. Confirm you want to delete the asset.

Click the **Yes** button.

40. With the associated policy details removed, and the policy already selected, delete the policy.

Click the **Delete** button.

41. Confirm you want to delete the policy.

Click the **Yes** button.

42. Click the **Save** button.

43. Policy **C55678** is now deleted.

44. You have completed the **Maintaining Policies** topic.

Maintaining Service Providers

Oracle ICM enables you to add service providers. Service providers can be dispatched for a claim. Oracle Insurance Claim Management ships with sample data for service providers. The sample data are:

- ABC Towing Services
- Speedy Taxi Company
- Reliable Rental

You must add service providers that meet your organization's needs.

In this topic, you will modify service providers.

Procedure: Maintaining Service Providers

1. Click the **Links** link.
2. Click the **Manage Insurance Claims** link.
3. Click the **Maintain Service Providers** link.
4. Use the **Maintain Service Providers** page to replace the sample data with your own. Service providers are made available when creating claims.

The screenshot displays the 'Maintain Service Providers' interface. On the left, a navigation pane shows 'Administration' with 'Maintain Service Providers' selected. The main area features a table of existing providers and a form for adding a new one. The form fields are populated with the following data:

Field	Value
Service Provider Name	ABC Towing Services
Service Provider Type	Towing Service
Title	(dropdown menu)
First Name	Al
Last Name	Smith
Middle Name	(empty)
Phone	888-231-1234
Email	Cpt.Smith@PSIR.com
Address Line 1	455 7th St
Address Line 2	(empty)
Address Line 3	(empty)
City	Oakland
Country	United States of America
State	California
Zip Code	94607

5. Add a service provider.
Click the **Add** button.
6. Click in the **Service Provider Name** field.
7. Enter the desired information into the **Service Provider Name** field. Enter "**ABC Taxi Company**".
8. Complete the remaining fields as necessary. In this example, the fields have been completed for you.
9. Saving the service provider makes it available when you update claims.

Click the **Save** button.

10. The service provider **ABC Taxi Company** is now added.

11. Next, modify the service provider details.

Click the **Taxi Service** object.

12. Click in the **Address Line 1** field.

13. Update the remaining fields as necessary. In this example, the fields have been updated for you.

14. To save the modifications, click **Save**. You can reverse any modification using the **Undo** button instead.

Click the **Save** button.

15. The **ABC Taxi Company** details are now modified.

16. Delete the **ABC Taxi Company** service provider. Ensure the service provider you want to delete is selected.

Click the **ABC Taxi Company** object.

17. Click the **Delete** button.

18. Confirm you want to delete the service provider.

Click the **Yes** button.

19. Click the **Save** button.

20. The service provider **ABC Taxi Company** is now deleted.

21. You have completed the **Maintaining Service Providers** topic.

Understanding the Determine Fraud Likelihood Percentage Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Insurance Claim Management uses Calculate Fraud For Lower Claimant Age and Calculate Fraud For Higher Claimant Age rules in the Determine Fraud Likelihood Percentage Ruleset, each of which includes a condition (IF) statement and an action (THEN) statement. By default, this ruleset determines the likelihood of fraud. If Oracle ICM is configured to use a predictive model, then the predictive model is used instead.

The condition of Calculate Fraud For Lower Claimant Age rule specifies that the claimant is under 30 years of age. The action sets the fraud likelihood to 60 percent.

The condition of Calculate Fraud For Higher Claimant Age rule specifies that the claimant is 30 or older. The action sets the fraud likelihood to 40 percent.

For example, a claimant is 25 years of age. The fraud likelihood for his claim is set to 60 percent because he is under 30 years of age.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action; it can require source code changes. Claim processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

Understanding the Fast Track Eligibility Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Insurance Claim Management uses the Set Fast Track Eligible Flag Rule, in the Evaluate For Fast Track Ruleset, which includes a condition (IF) statement and an action (THEN) statement. The condition statement sets the following:

- Claim loss type is Accident with No Injuries, and
- Repair estimate is 500 or less, and
- Proof that all documentation has been reviewed is true, and
- Repair estimate is more than zero

The action statement sets the fast track eligible flag to true.

For example, a policy holder reports he has been in an accident, his passenger was injured, and the whole right side of his car is crunched. The claim is not eligible for fast track because all the conditions for a fast track claim are not met.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action; it can require source code changes. Claim processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

Understanding the Insurance Claim Management Rules Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Insurance Claim Management uses the ICM Action Activation Rules and the ICM State Transition Rules Decision Tables in the Insurance Claim Management Rules Ruleset to determine how to process a claim based on specific conditions. These decision tables include conditions and actions as the rows and rules as the columns. The rules test the values of the conditions and set corresponding values for the actions. The rules must account for all possible combinations of values of all conditions in the table. A dash means "this value doesn't matter." Bucketsets are used to set pre-defined values for certain rules.

Oracle Insurance Claim Management Process Accelerator

Upon submission of a claim, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The ICM Action Activation Rules and the ICM State Transition Rules Decision Tables below provide the details for each condition, its rules, and the actions to execute. Following each table is an example scenario explaining how a claim is processed based on a given condition for that decision table.

ICM Action Activation Rules Decision Table (1 of 3)

		R1	R2	R3	R4	R5	R6
Conditions	ClaimType.statuscode	FNOL	FNOL	FNOL	EVALUATION	EVALUATION	EVALUATION
	StatusType.coverageVerificationStatus	VERIFIED	NOT_VERIFIED	Null	-	-	-
	StatusType.claimValidationStatus	-	-	-	VALIDATED	VALIDATED	NOT_VALIDATED
	StatusType.settlementStatus	-	-	-	-	-	-
	ClaimType.fastTrackEligibleFlag	-	-	-	true	false	-
	StatusType.appraisalStatus	-	-	-	-	-	-
	StatusType.examinationStatus	-	-	-	-	-	-
Actions	call activateActivity	✓		✓	✓	✓	
	activityName:String	"AssignCaseManager"		"VerifyCoverage"	"InitiateFastTrackSettlement"	"EstablishClaimReserve"	
	call activateActivity	✓		✓		✓	
	activityName:String	"DispatchService"		"UpdateFirstNoticeofloss"		"EvaluateForFastTrack"	
	call activateActivity			✓		✓	
	activityName:String			"RunAutoFraudCheck?"		"AssignFieldAdjuster"	
	call activateActivity			✓			
	activityName:String			"ReferToFraudDepartment"			
	call activateActivity			✓			
	activityName:String			"CloseClaim"			
	call activateActivity			✓			
	activityName:String			"DeclineClaim"			
	call withdrawActivity						✓
	activityName:String						"InitiateFastTrackSettlement"
	call withdrawActivity			✓			✓
	activityName:String		"AssignCaseManager"				"EstablishClaimReserve"
call withdrawActivity			✓			✓	
activityName:String		"DispatchService"				"EvaluateForFastTrack"	
call withdrawActivity						✓	
activityName:String						"AssignFieldAdjuster"	
call withdrawActivity	✓		✓	✓	✓	✓	
activityName:String	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	

ICM Action Activation Rules Decision Table (2 of 3)

		R7	R8	R9	R10	R11	R12
Conditions	ClaimType.statuscode	EVALUATION	APPRAISAL	APPRAISAL	APPRAISAL	APPRAISAL	SETTLEMENT
	StatusType.coverageVerificationStatus	-	-	-	-	-	-
	StatusType.claimValidationStatus	null	-	-	-	-	-
	StatusType.settlementStatus	-	-	-	-	-	OFFER_CREATED
	ClaimType.fastTrackEligibleFlag	-	-	-	-	-	-
	StatusType.appraisalStatus	-	COMPLETED	IN_PROGRESS	null	-	-
	StatusType.examinationStatus	-	COMPLETED	-	null	IN_PROGRESS	-
Actions	call activateActivity	✓	✓		✓		✓
	activityName:String	"ValidateClaim"	"SubmitAppraisal"		"ExamineDamage"		"RecordOfferOutcome"
	call activateActivity				✓		
	activityName:String				"CreateCostEstimates"		
	call activateActivity						
	activityName:String						
	call activateActivity						
	activityName:String						
	call activateActivity						
	activityName:String						
	call activateActivity						
	activityName:String						
	call withdrawActivity			✓		✓	✓
	activityName:String			"SubmitAppraisal"		"SubmitAppraisal"	"InitiateRecovery"
	call withdrawActivity						✓
	activityName:String						"InitiateArbitration"
call withdrawActivity						✓	
activityName:String						"CreatePayment"	
call withdrawActivity							
activityName:String							
call withdrawActivity	✓	✓	✓	✓	✓	✓	
activityName:String	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	

ICM State Transition Rules Decision Table (1 of 2)

Conditions	R7	R8	R9	R10	R11
CaseActivityEvent:activityEvent	COMPLETED	COMPLETED	COMPLETED	COMPLETED	COMPLETED
CaseActivityEvent:activityName	"SubmitAppraisal"	"InitiateRecovery"	"CloseClaim"	"DeclineClaim"	"AssignFieldAdjuster"
modify ClaimType					
status:ClaimStatus:ClaimStatusCodeEnum	ClaimStatusCodeEnum:SETTLEMENT	ClaimStatusCodeEnum:RECOVERY	ClaimStatusCodeEnum:CLOSED	ClaimStatusCodeEnum:CLOSED	ClaimStatusCodeEnum:APPRAISAL
Call withdrawActivity		✓	✓	✓	✓
activityName:String		"CreateSettlementOffer"	"UpdateFirstNoticeofLoss"	"UpdateFirstNoticeofLoss"	"UpdateFirstNoticeofLoss"
Call withdrawActivity		✓	✓	✓	✓
activityName:String		"RecordOfferOutcome"	"VerifyCoverage"	"VerifyCoverage"	"ValidateClaim"
Call withdrawActivity		✓	✓	✓	✓
activityName:String		"CreatePayment"	"AssignCaseManager"	"AssignCaseManager"	"EstablishClaimReserve"
Call withdrawActivity		✓	✓	✓	✓
activityName:String		"InitiateArbitration"	"ValidateClaim"	"ValidateClaim"	"EvaluateForFastTrack"
Call withdrawActivity		✓	✓	✓	✓
activityName:String			"InitiateFastTrackSettlement"	"InitiateFastTrackSettlement"	"InitiateFastTrackSettlement"
Call withdrawActivity	✓		✓	✓	✓
activityName:String	"ExamineDamage"		"CreateSettlementOffer"	"CreateSettlementOffer"	
Call withdrawActivity	✓		✓	✓	
activityName:String	"CreateCostEstimates"		"RecordOfferOutcome"	"RecordOfferOutcome"	
Call withdrawActivity			✓	✓	
activityName:String			"CreatePayment"	"CreatePayment"	
Call withdrawActivity			✓	✓	
activityName:String			"InitiateArbitration"	"InitiateArbitration"	
Call withdrawActivity			✓	✓	
activityName:String			"RunAutoFraudCheck"	"RunAutoFraudCheck"	
Call withdrawActivity			✓	✓	
activityName:String			"ReferToFraudDepartment"	"ReferToFraudDepartment"	
Call withdrawActivity			✓	✓	
activityName:String			"DispatchService"	"DispatchService"	
Call withdrawActivity			✓	✓	
activityName:String			"EstablishClaimReserve"	"EstablishClaimReserve"	
Call withdrawActivity			✓	✓	
activityName:String			EvaluateForFastTrack"	EvaluateForFastTrack"	
Call withdrawActivity			✓	✓	
activityName:String			"AssignFieldAdjuster"	"AssignFieldAdjuster"	
Call withdrawActivity			✓	✓	
activityName:String			"ExamineDamage"	"ExamineDamage"	
Call withdrawActivity			✓	✓	
activityName:String			"CreateCostEstimates"	"CreateCostEstimates"	
Call withdrawActivity			✓	✓	
activityName:String			"SubmitAppraisal"	"SubmitAppraisal"	
Call withdrawActivity			✓	✓	
activityName:String			InitiateRecovery"	InitiateRecovery"	
Call withdrawActivity			✓	✓	
activityName:String			"RecordFraudReviewStatus"	"RecordFraudReviewStatus"	
Call withdrawActivity			✓	✓	
activityName:String			"DeclineClaim"	"CloseClaim"	
Call reachMilestone	✓	✓	✓	✓	✓
milestoneName:String	"Appraisal"	"Settlement"	"Closed"	"Closed"	"Evaluation"
Comments:String	"Appraisal completed"	"Settlement completed after recovery initiated"	"Claim is closed"	"Claim is declined"	"Evaluation completed after assigning field adjuster"

For example, a CSR assigns a case manager to the claim. The status of the claim is now set to Evaluation. The conditions for rule R2 are now met, as a result, the Verify Coverage and Dispatch Service activities are withdrawn. A new set of activities may get activated based on evaluation of the R4, R5, R6 and R7 rules in the Action Activation Rule Decision Table.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action; it can require source code changes. Claim processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

Understanding the Oracle Insurance Claim Management Reports

This section is for insurance personnel reviewing reports on submitted claims. Use Oracle BAM Active Viewer to view the reports delivered with Oracle Insurance Claim Management (ICM).

You must have a solid working knowledge of Oracle Business Activity Monitoring (BAM) before creating or editing reports. For information on creating and editing Oracle BAM reports, see "Creating and Managing Reports," in *Oracle Fusion Middleware User's Guide for Oracle Business Activity Monitoring*.

Oracle Insurance Claim Management includes two dashboards, ICM Operational Dashboard, and ICM Performance Dashboard, with twelve views. These views use information from the claims submitted in Oracle ICM. Information from saved claims is not used in the views.

ICM Operational Dashboard

The ICM Operational Dashboard consists of eight views. The first four are listed under Today's Activities report. These display the number of new claims, declined claims, paid claims, and amount paid out on a claim. The remaining views provide information on open claims. The following provides an explanation and a sample image of the views.

Today's Activities

New Claims

The New Claims view is a collapsed list that displays the number of new claims created within the day.

New Claims
1

Declined Claims

The Declined Claims view is a collapsed list that shows the number of claims that went to a Closed status with a Declined close reason within the day.

Declined Claims
3

Paid Claims

The Paid Claims view is a collapsed list that displays the number of claims that went to a Closed status with a Paid close reason within the day.

Paid Claims
13

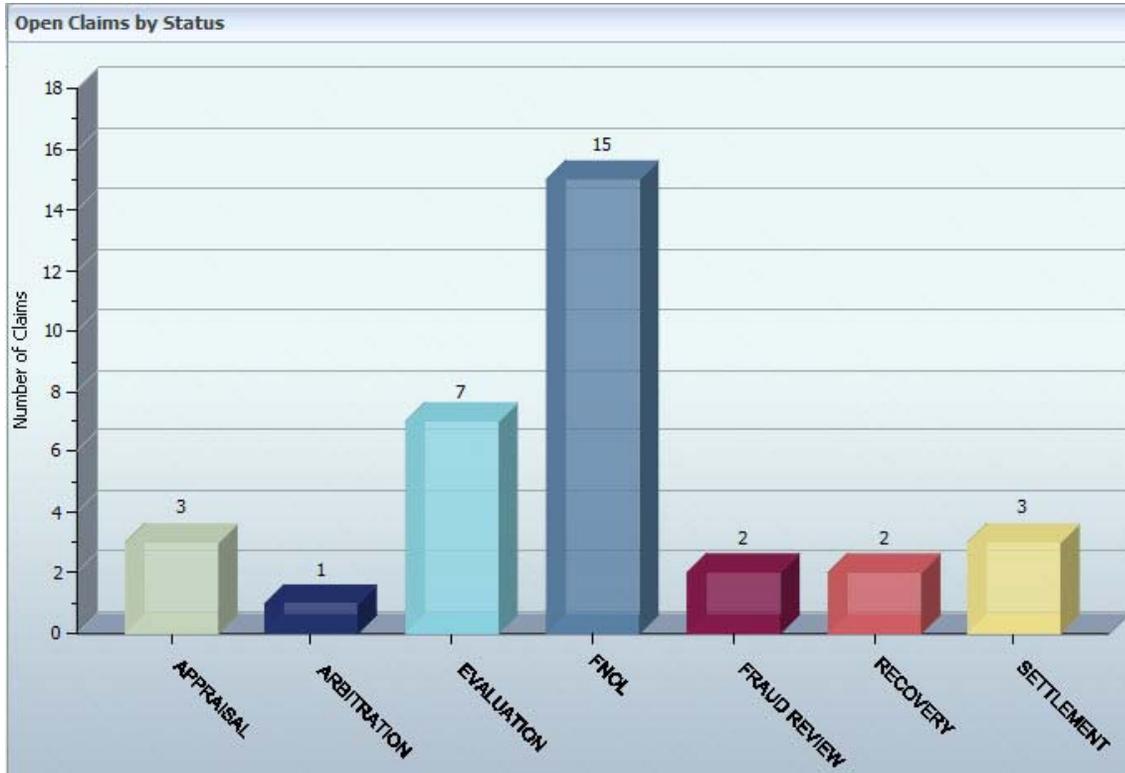
Amount Paid

The Amount Paid view is a collapsed list that displays the total dollar amount paid out on claims that went to a Closed status with a Paid close reason within the day.

Amount Paid (\$)
11888

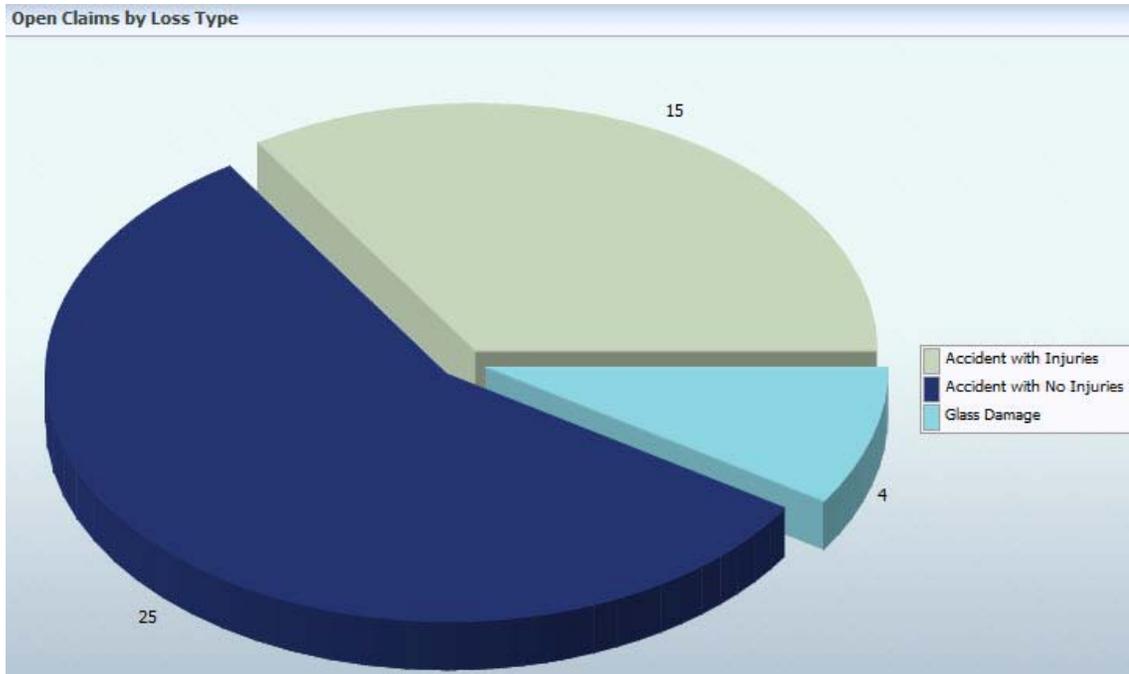
Open Claim by Status

The Open Claim by Status view is a 3D bar chart summarizing the number of claims by status on the X-axis. The statuses vary based on what is set up in Oracle ICM. The total number of claims appears on top of each bar. The Y-axis shows the total number of claims in increments of two, from zero to infinity.



Open Claims by Loss Type

The Open Claims by Loss Type view is a 3D pie chart summarizing the number of claims by loss type. The loss types vary depending on what is set up in Oracle ICM. Each slice displays the number of claims for that slice.



Participant Workload

The Participant Workload view is a collapsed list summarizing the total number of claims by role.

Participant Workload	
Case Manager	10
Customer Service Representative	15
Field Adjuster	3
Fraud Investigator	2

Alerts

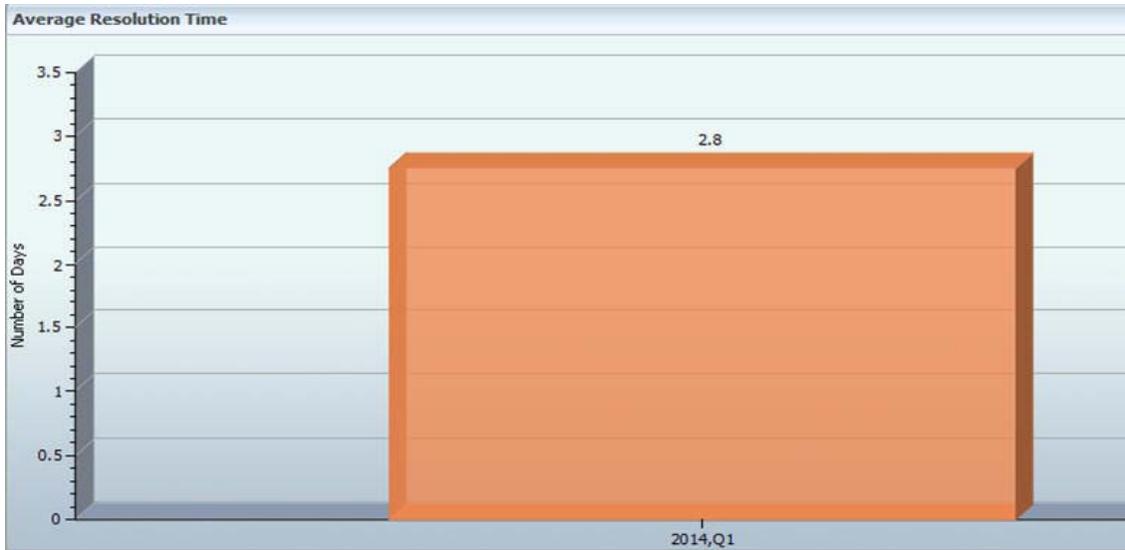
Alerts is an updating ordered list view that displays alert messages when a claim has been open for more than 30 days, or when a claim has a fraud likelihood of 90% or higher. The left column displays the alert message. The right column specifies the time the alert was received.

ICM Performance Dashboard

The ICM Performance Dashboard consists of four views pertaining to the historical analysis of processed claims. You can filter the views using the report parameters Period and Line of Business. The following provides an explanation and a sample image of the views.

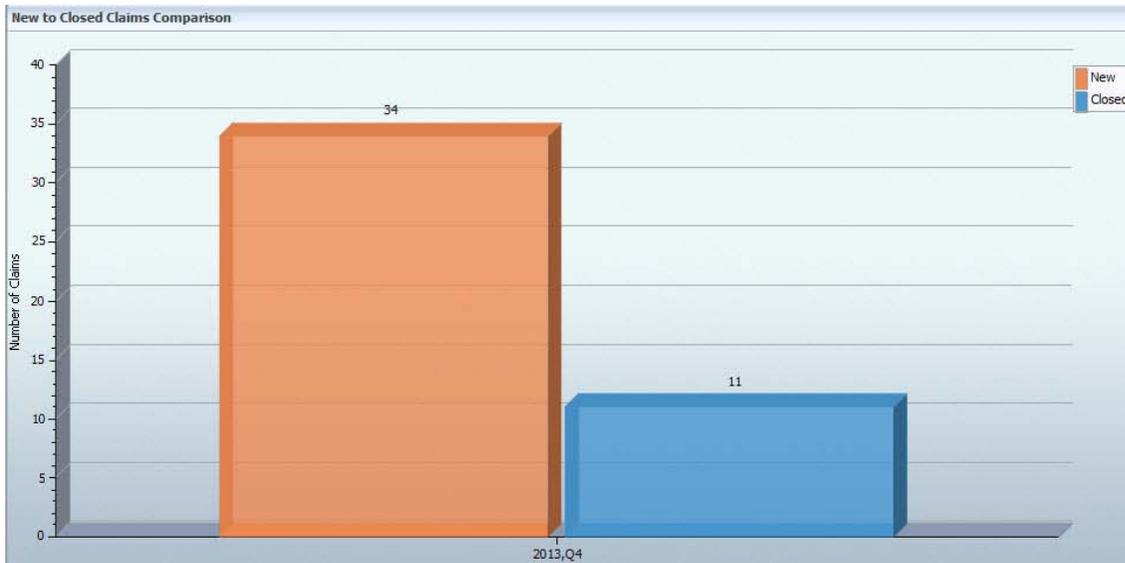
Average Resolution Time

The Average Resolution Time is a 3D bar chart summarizing the average time it takes to resolve a claim. The X-axis displays the time period by year and quarter for the resolution. The average resolution time is displayed on the top of the bar. The Y-axis displays the number of days to resolve the claim from zero to infinity. You can click a bar to see the details.



New to Closed Claims Comparison

The New to Closed Claims Comparison view is a 3D bar chart summarizing the number of new claims to closed claims. The X-axis displays the time period by year and quarter for new and closed claims. The Y-axis displays the number of claims from zero to infinity, in increments of five.



Total Payments

The Total Payments view is a line chart summarizing the total payments paid out on claims for a period of time. The X-axis displays the time period by year and quarter. The Y-axis displays

the payment amount in dollars from zero to infinity.



Fraudulent Claims

The Fraudulent Claims view is a line chart summarizing the percentage of fraudulent claims for a period of time. The X-axis displays the time period by year and quarter. The Y-axis displays the percentage of fraud from zero to 100 percent.



Delivered Documentation

This section provides a complete list of the delivered documentation for Oracle Insurance Claim Management (ICM).

The delivered documents are:

Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators - This content provides instructions for installing any Oracle Process Accelerator.

Oracle Fusion Middleware Extensibility Guide for Oracle Process Accelerators - This content provides information about customizing and extending Oracle Process Accelerators.

Oracle Process Accelerators Known Issues - This content provides information about the known issues with any Oracle Process Accelerator.

Oracle Fusion Middleware User's Guide for Oracle Insurance Claim Management Process Accelerator - This content provides information on how to use and modify Oracle Insurance Claim Management Process Accelerator. The content of this manual is also available in the following formats:

- Process Accelerator Help system
- User Productivity Kit (UPK) demo
- UPK source content

Process Accelerator Help System - The Help system is available when you launch the  or the **User Productivity Kit** link from the process accelerator Help menu.

UPK Demo - You can use the User Productivity Kit demo for training or presentation purposes while installing the process accelerator. To utilize the UPK demo, unzip the **<PA acronym>UPK.zip** file and distribute the PlayerPackage directory and its contents to those who need training; or place the PlayerPackage directory and its contents on a web server and provide the URL to its location. The **play.exe** file launches the UPK Player.

UPK Source Content - If you have a licensed version of Oracle User Productivity Kit you can modify the UPK content using the **UPKSource.zip** file. Use the following steps to deploy your modified UPK content as the Help for the Process Accelerator.

1. Unzip **UPKsource.zip**.
2. In UPK Developer, import the **<PA acronym>UPKsrc.odarc** file you want to modify.
3. Modify and publish your updated content to the Player.
4. Rename the **PlayerPackage** directory to **<PA acronym>UPK**.
5. Convert the **<PA acronym>UPK** directory and its contents into a web application archive (war) file called **<PA acronym>UPK.war**.
6. On your Oracle WebLogic Server, navigate to **\$PA_HOME/pa/src/<PA acronym>/UPKObjects**, rename **<PA acronym>UPK.war** to **<PA acronym>UPK.warORIG**.
7. Copy your new **<PA acronym>UPK.war** to **\$PA_HOME/pa/src/<PA acronym>/UPKObjects**.
8. Navigate to **\$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/<PA acronym>UPK/app**, rename **<PA acronym>UPK.war** to **<PA acronym>UPK.warORIG**.
9. Copy your new **<PA acronym>UPK.war** to **\$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/<PA acronym>UPK/app**.
10. In Oracle WebLogic Server Administration Console, navigate to the **Domain Structure** navigation tree, click **Deployments**.

11. On the **Summary of Deployments** page, select the **<PA acronym>UPK** check box, and click **Update**.
12. On the **Update Application Assistant** page, change the **Source Path** to the location you extracted the **<PA acronym>UPK.war** file to.
13. Click **Next**, **Next**, then **Finish**.
14. Launch the Process Accelerator Help to view the updated documentation.