

First American Property and  
Casualty Insurance Company

First American Specialty  
Insurance Company

# Claims Diary Procedure For SIS System

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# Claims Diary Procedure

The purpose of this document is to provide a consistent procedure for claims diary management.

## 1. Set up Claim

### I. Verified Claim Set Up

**NOTE: Diaries are automatically populated at the final stage of verified claim setup. Do not manually add diaries.**

From the **SIS Main Menu**, select **[4] Claims Management System** and press **[ENTER]**.



From the **Claims Management System-Main Menu**, select **[1] Claims Maintenance Menu** and press **[ENTER]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CMSMENUS           Quality environment-14th PTF      System:  S102M5LM
HFUCINB            Claims Management System      2/23/06 14:15:13
HFUCINARQ         Main Menu

Select one of the following:

    1. Claim maintenance menu
    2. Draft maintenance menu
    3. Inquiry menu
    4. Report menu
    5. Miscellaneous utility menu

90. Sign off

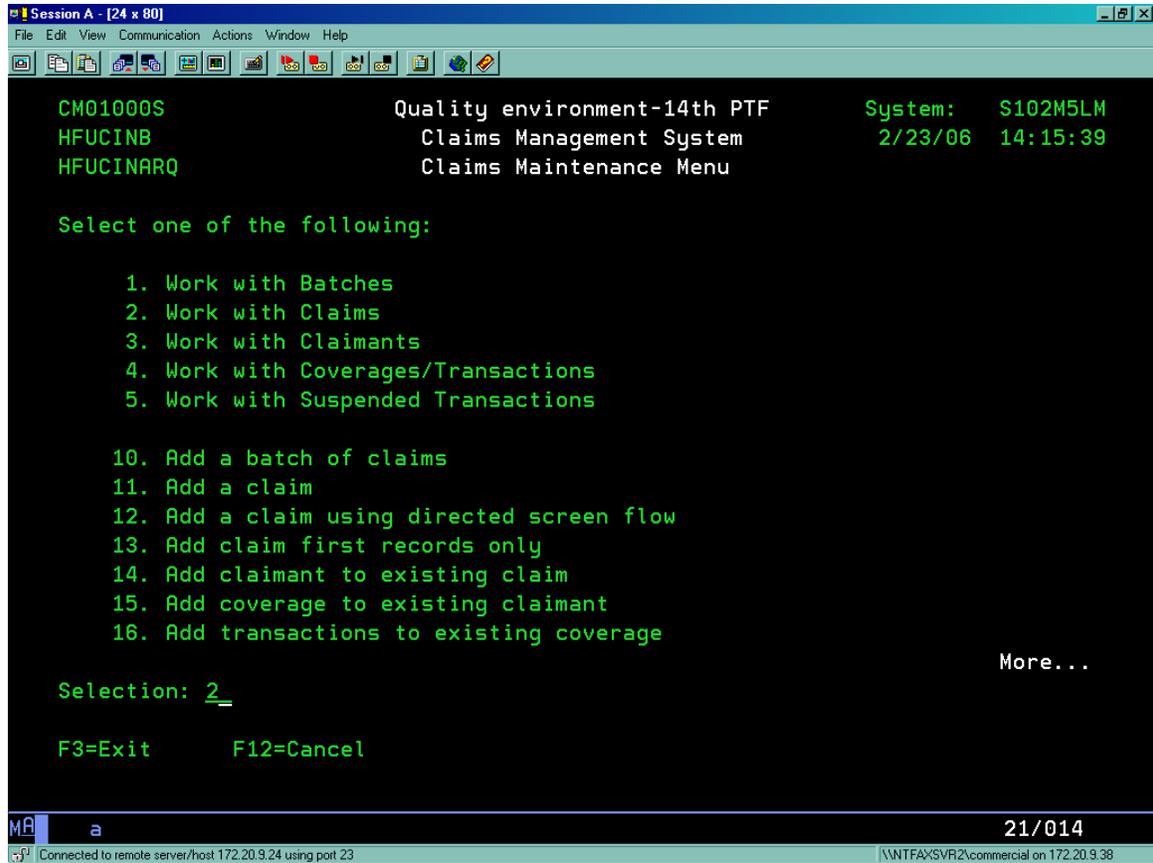
Selection: 1_

F3=Exit    F12=Cancel

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MA a                                     21/014
Connected to remote server/host 172.20.9.24 using port 23  \\WTFAX\SVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Claims Maintenance Menu** sub screen, select **[2] Work with Claims** and press **[ENTER]**.



```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01000S          Quality environment-14th PTF      System:  S102M5LM
HFUCINB          Claims Management System      2/23/06  14:15:39
HFUCINARQ        Claims Maintenance Menu

Select one of the following:

    1. Work with Batches
    2. Work with Claims
    3. Work with Claimants
    4. Work with Coverages/Transactions
    5. Work with Suspended Transactions

    10. Add a batch of claims
    11. Add a claim
    12. Add a claim using directed screen flow
    13. Add claim first records only
    14. Add claimant to existing claim
    15. Add coverage to existing claimant
    16. Add transactions to existing coverage

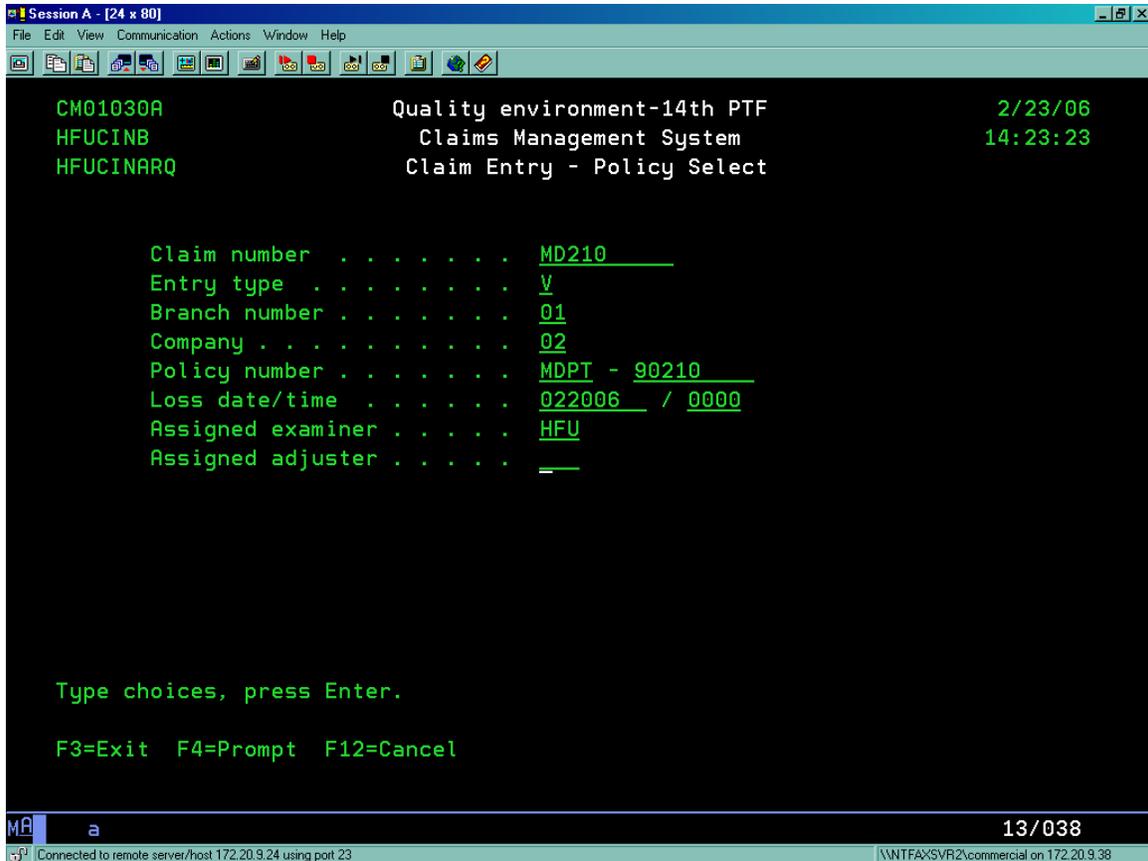
More...

Selection: 2_

F3=Exit      F12=Cancel

MA  a  21/014
Connected to remote server/host 172.20.9.24 using port 23  \\WTFAX\SVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Work with Claims** sub screen, press **[F6]** to add a new claim.



Add Instructions:

- Enter Claim Number. This is not a computer generated number. It is assigned specific to the policy prefix.
- Enter Entry Type. Prompt **[F4]**, select “V” (Verified). A verified claim is a claim that has a corresponding policy within the Policy Processing portion of the Specialty System. The CMS system will locate the policy information to include name, address and coverage information and bring it to the claims system for use in entering the claim.
- Enter Branch Number. Prompt **[F4]**, select “01” (P&C) or “33” (Specialty).
- Enter Company. Prompt **[F4]**, select “01” (Specialty) or “02” (P&C).
- Enter Policy Number.
- Enter Loss Date.
- Assign Examiner. Prompt **[F4]**, select Examiner.
- Press **[ENTER]** to continue.

The system now prompts to the **Add Occurrence** screen. Some information is already generated. The Add Occurrence screen consists of three pages.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01031A          Quality environment-14th PTF          2/23/06
HFUCINB          Claims Management System           14:23:53
HFUCINARQ        Add Occurrence                                     Page 1 of 3

Claim number . . . : MD210          Company number . . : 02
Client ID . . . . : 000000001067    Policy number . . . : MDPT - 90210
Branch number . . . : 01            Claim status . . . : E - Entered

Claim entry type . . . . : V - Verified
Loss reported by . . . . : Mr. Insured
Loss date/time . . . . . : 2/20/06 / 0000
Policy type/state . . . . : H4 / MD
Policy eff/exp date . . . . : 2/25/05 / 2/25/06
Facultative reinsurance . . . . : - No Fac Reinsurance
Agent number . . . . . : 001 LM1001      MULTIFAMILY COMMUNITY
Insured name . . . . . : GARY WASHINGTON
Insured address . . . . . : 97840 DAVENPORT WAY

Insured city/state/zip . . : Ridgely          MD 21684
More...

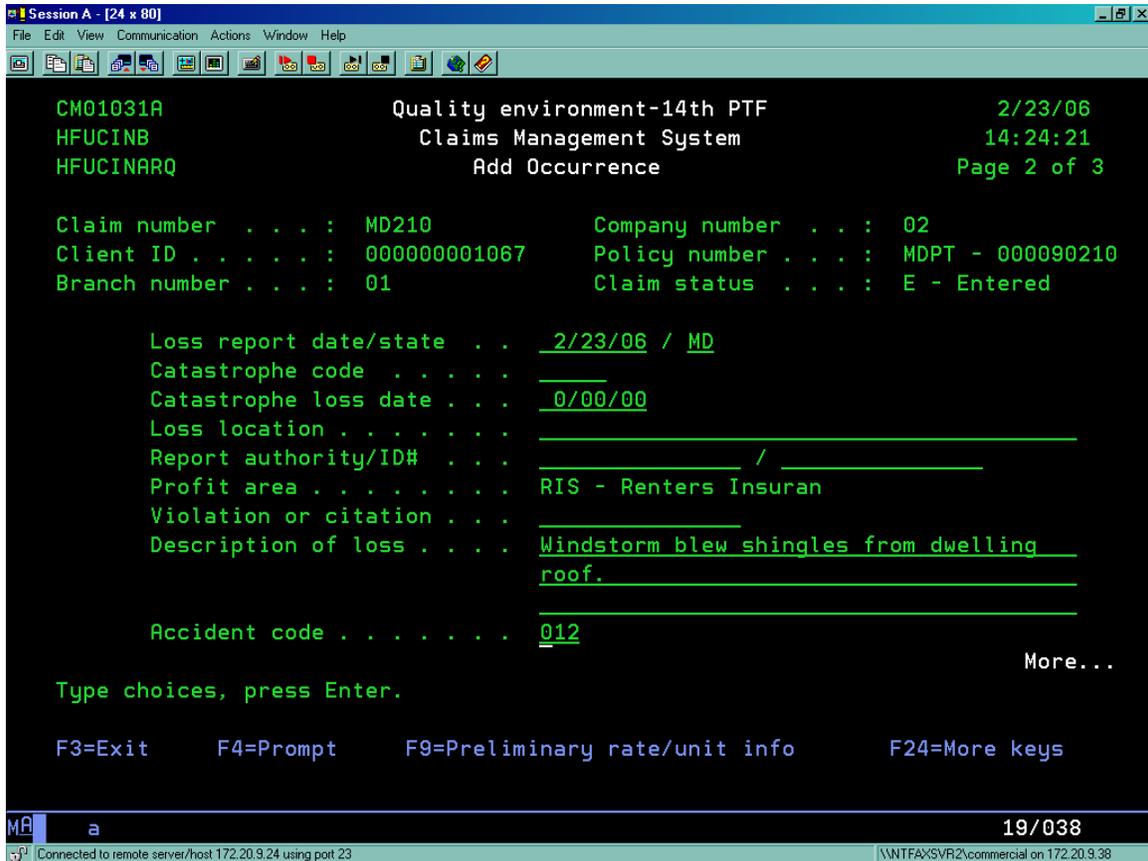
Type choices, press Enter.

F3=Exit      F4=Prompt      F9=Preliminary rate/unit info      F24=More keys

MA a 10/049
Connected to remote server/host 172.20.9.24 using port 23
\\WTFAX\SVR2\commercial on 172.20.9.38
```

Add instructions:

- Enter Loss Reported By field. This is who reported the claim (i.e. Insured, Claimant Attorney...)
- Press **[ENTER]** to continue.



Add Instructions:

- Enter Loss Report State field.
- Enter Description of Loss field.
- Enter Accident Code. Prompt **[F4]**; select the appropriate code by entering “1” under the option column. Press **[ENTER]** to populate the field.
- Press **[Page Down]** to access page 3 of 3. These fields do not need to be filled out.
- Press **[ENTER]** to continue.

From the **Claims Management System-Unit Selection** sub screen, enter “1” to select the unit which was involved in the claim. Press **[ENTER]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01811A          Quality environment-14th PTF          2/23/06
HFUCINB          Claims Management System          14:24:41
HFUCINARQ          Unit selection

Claim number . . . : MD210          Company number . . : 02
Loss date . . . . : 2/20/06         Policy number . . . : MDPT - 000090210
Branch number . . . : 01            Effective date . . : 2/25/05
                                           Expiration date . . : 2/25/06

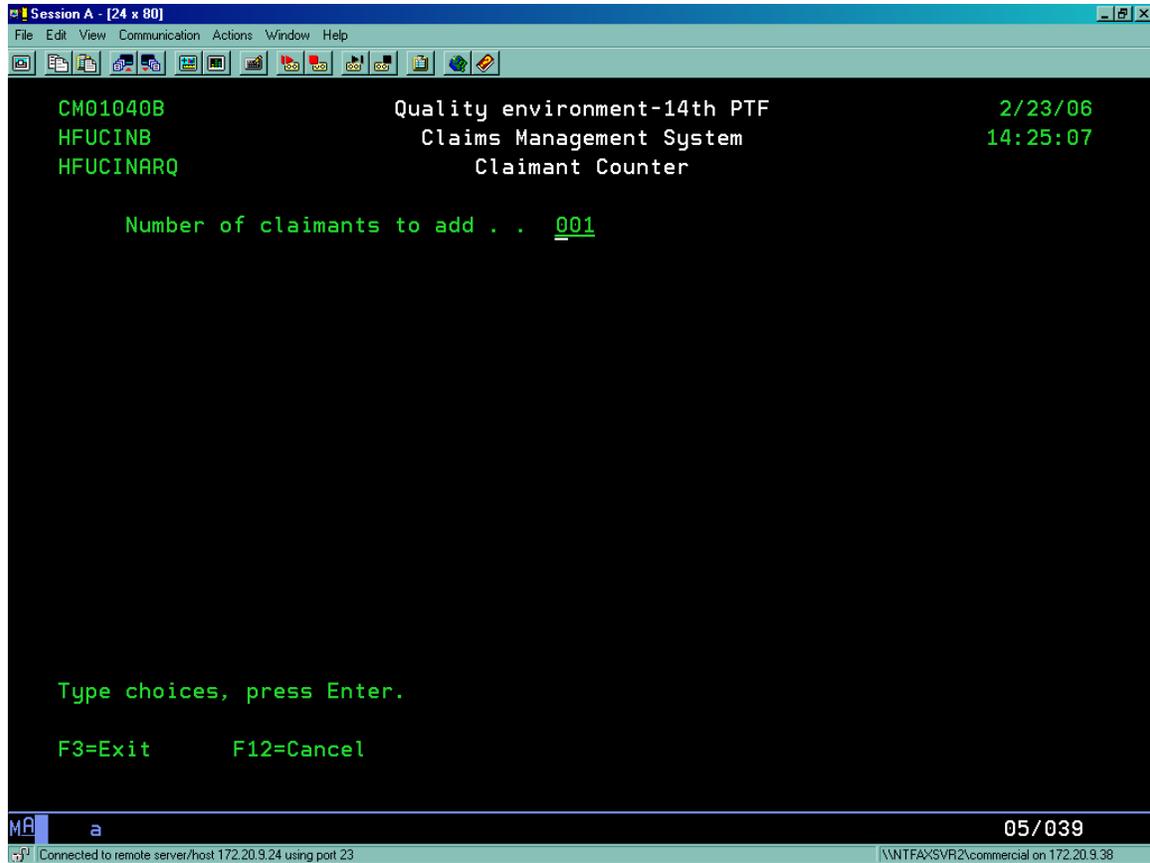
Type options, press Enter.
  1=Select

Opt  Unit  Description          Identification/Serial No.
  1  001  TENANT

F3=Exit  F12=Cancel

MA  a  14/003
Connected to remote server/host 172.20.9.24 using port 23  \\WTFAX\SVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Claimant Counter** sub screen, enter the number of claimants to be added to the claim at this time. Press **[ENTER]**.



From the **Claims Management System-Add Claimant** sub screen enter the Claimant is insrd/other field. Prompt **F4**, select "I" for insured\*. Press **[Enter]** to populate remaining fields. Press **[ENTER]** to continue.

```

Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01040D          Quality environment-14th PTF          2/23/06
HFUCINB          Claims Management System          14:25:40
HFUCINARQ          Add Claimant          Page 1 of 4

Claim number . . . : MD210          Company number . . : 02
Loss date . . . . : 2/20/06          Policy number . . . : MDPT - 000090210
Branch number . . . : 01

Claimant number . . . . . 001
Claimant is insrd/other . . I
Name title . . . . .
First/middle . . . . . GARY /
Last name/suffix . . . . . WASHINGTON /
Alternate name . . . . . GARY WASHINGTON
Address No/Street/Apt . . . 97840 DAVENPORT WAY
Address line 2 . . . . .
City/State/Zip . . . . . Ridgely MD 21684
Home/office phone . . . . . /
Best time to call . . . . .

Type choices, press Enter.
F3=Exit   F4=Prompt   F12=Cancel

More...
MA a 10/038
Connected to remote server/host 172.20.9.24 using port 23
\\NTFAXSVR2\commercial on 172.20.9.38
  
```

\*Note:

If **[I]**nsured is entered then the insured's information will be added to the address fields.

**[O]**ther is relevant only with Personal or Commercial Auto Policies.

If **[N]**either is entered the information can be entered manually. Neither is used for third party claimants.

From the **Claims Management System-Coverage Selection** sub screen, enter "1" next to applicable coverage codes for the loss. Press **[ENTER]** to continue.

```

Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01821A          Quality environment-14th PTF          2/23/06
HFUCINB          Claim Management System          14:26:13
HFUCINARQ          Coverage Selection

Claim number . . . : MD210          Company number . . : 02
Loss date . . . . : 2/20/06          Policy number . . . : MDPT - 000090210
Branch number . . . : 01
Claimant number . . : 001 - GARY WASHINGTON

Type options, press Enter.
1=Select

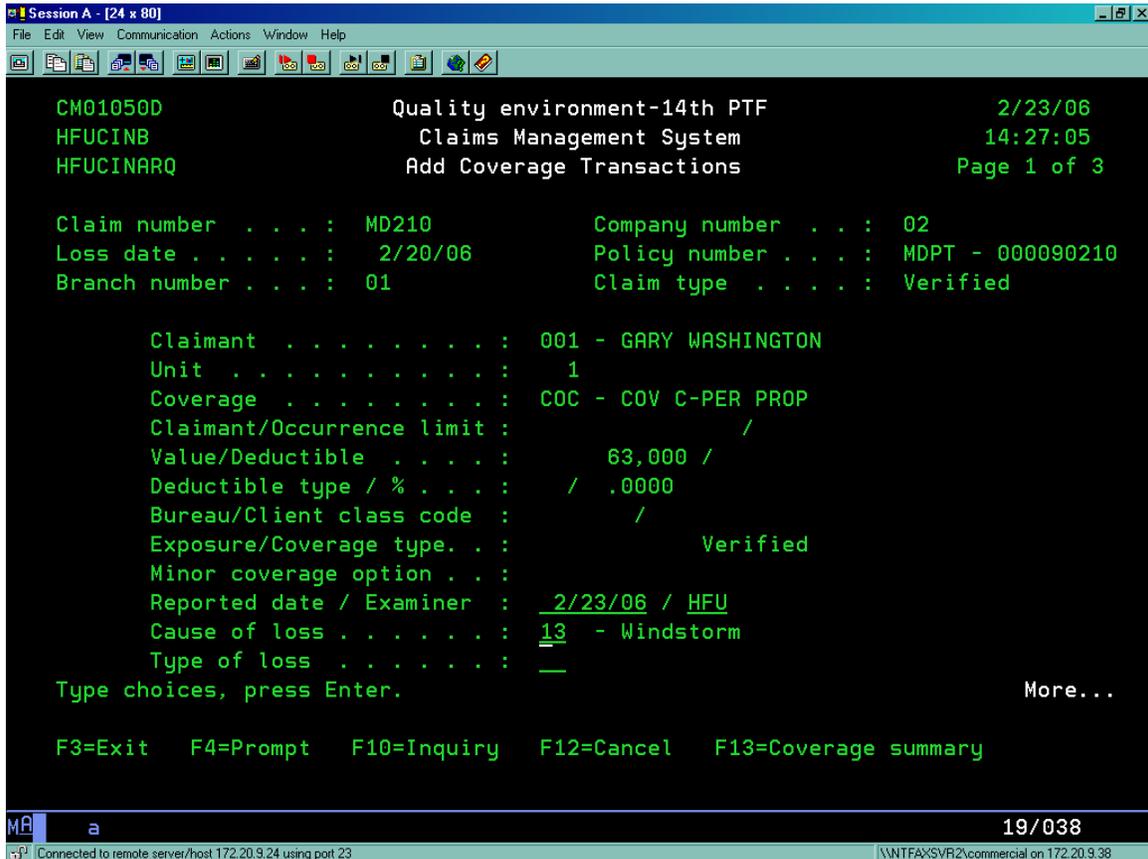
Opt  Unit          Coverage          Class  Limits          Value
-   001 - TENANT    ADR - ADD RES REN
-   001 - TENANT    BUP - BUS PURS    TEACH
-   001 - TENANT    CCI - CREDIT CARD 1000
1   001 - TENANT    COC - COV C-PER P          63,000
-   001 - TENANT    COD - COV D-LOU          25,200
-   001 - TENANT    COE - COV E-LIAB    100000
=   001 - TENANT    COF - COV F-MED    1000
-   001 - TENANT    COP - CONTENTS PL          +

F3=Exit F9=Add non-policy coverage F12=Cancel F13=Select additional units

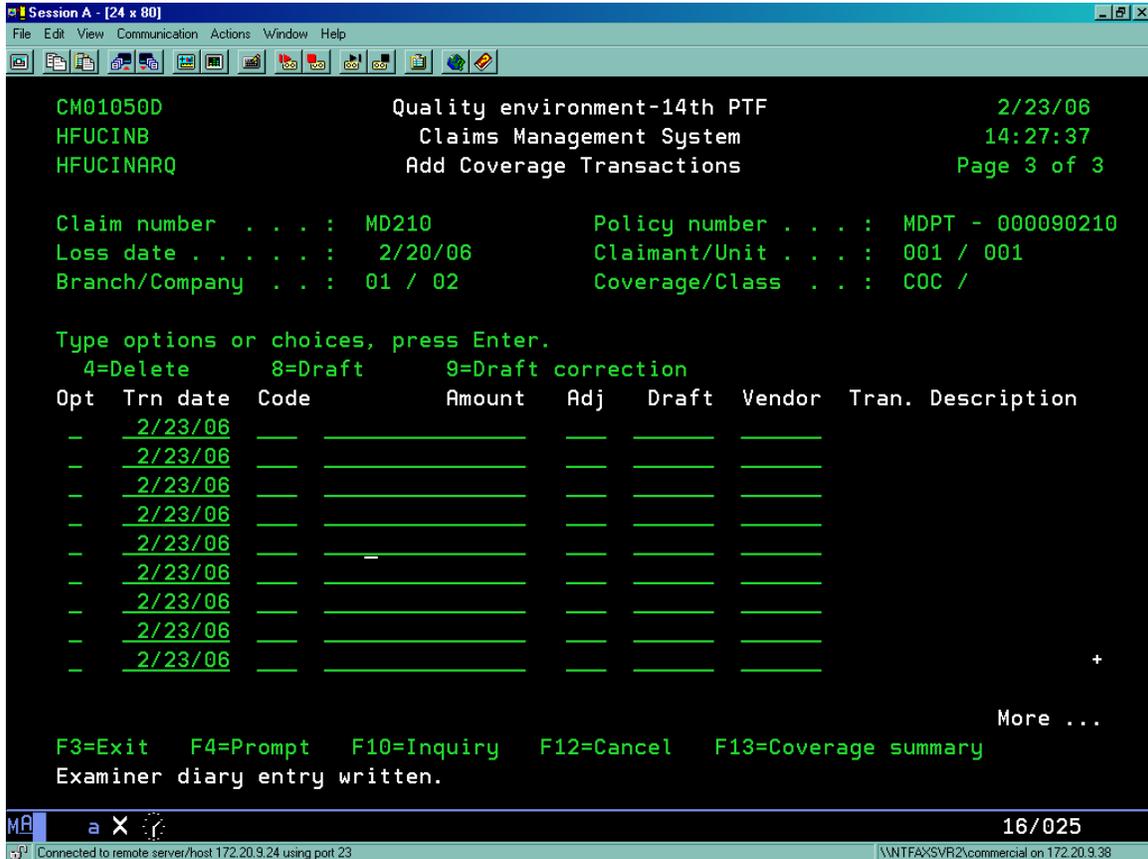
MA a 20/003
Connected to remote server/host 172.20.9.24 using port 23
\\WTFAX\SVR2\commercial on 172.20.9.38

```

From the **Claims Management System-Add Coverage Transactions** sub screen enter the Cause of Loss. Prompt **[F4]**, select appropriate option and press **[ENTER]** twice to populate field. Press **[ENTER]** twice more to access page 3 of 3 of the Add Coverage Transactions screen.



From page 3 of 3 of the **Claims Management System-Add Coverage Transactions** sub screen open the reserve for the claim or press **[ENTER]** to automatically set up the diaries\*.



\* At the bottom of the screen the system will indicate that the diaries are being written. Because the adjuster/examiner and supervisor diaries populate at this time there is no need to manually enter additional diaries.

## II. Report Only Claim Set Up

**Note: Diaries will not automatically populate during a Report Only Claim Set Up. The diaries will be manually entered as discussed at the end of this section. Use manual diary set up only when necessary and only with a Report Only Claim.**

From the **SIS Main Menu**, select **[4] Claims Management System** and press **[ENTER]**.



```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
SISMENU          Quality environment-14th PTF      System:  S102M5LM
HFUCINB          SIS Main Menu          2/26/06  13:16:16
HFUCINARQ

Select one of the following:

  1. Client Data Base System . . . . . CDB
  2. Policy Administration System . . . . . ALP
  3. Insurance Billing System . . . . . IBS
  4. Claims Management System . . . . . CMS
  5. Statistical Reporting System . . . . . SRS
  6. Casualty Information System . . . . . CIS
  7. Change Job data for Testing

 90. Sign off

Selection:  4_

F3=Exit      F6=Display messages      F12=Cancel

MA a 21/015
Connected to remote server/host 172.20.9.24 using port 23  WNTFA.XSVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Main Menu**, select **[1] Claims Maintenance Menu** and press **[ENTER]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CMSMENUS          Quality environment-14th PTF      System:  S102M5LM
HFUCINB           Claims Management System      2/26/06  13:21:07
HFUCINARQ        Main Menu

Select one of the following:

    1. Claim maintenance menu
    2. Draft maintenance menu
    3. Inquiry menu
    4. Report menu
    5. Miscellaneous utility menu

90. Sign off

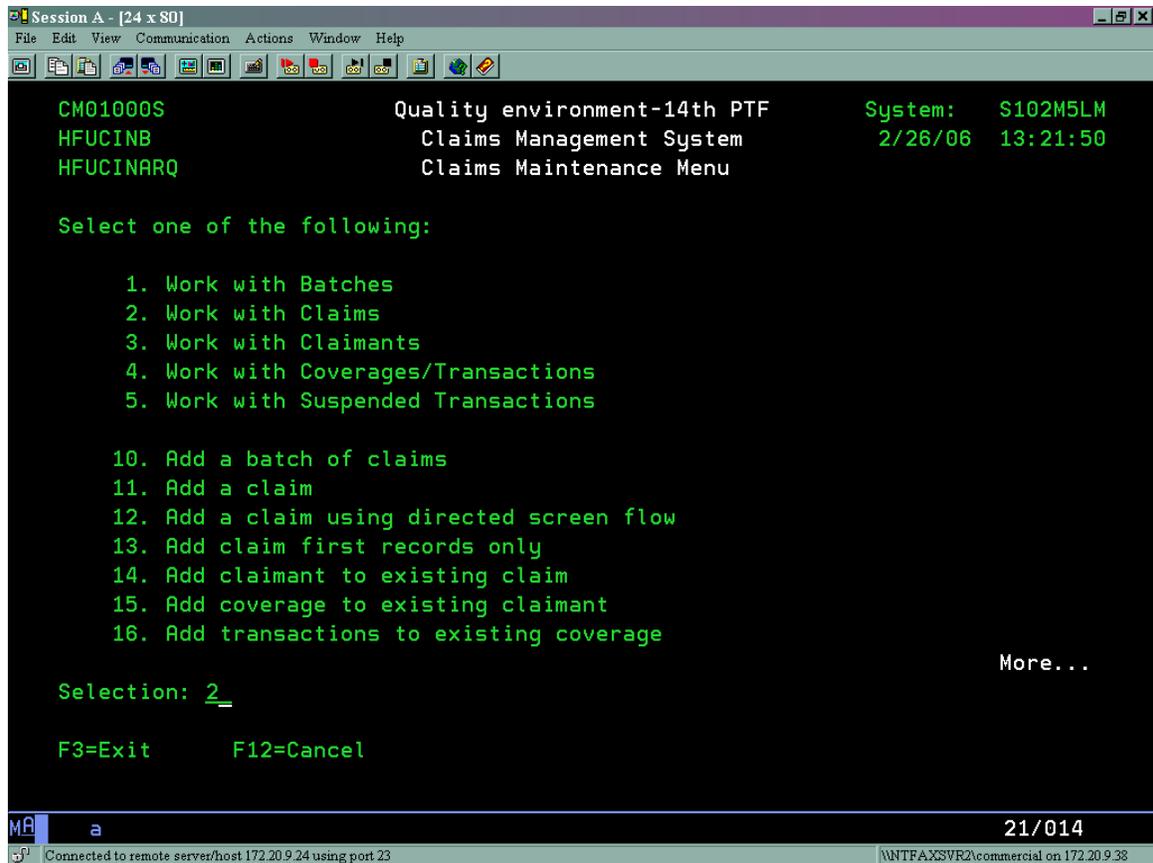
Selection: 1_

F3=Exit      F12=Cancel

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MA a 21/014
Connected to remote server/host 172.20.9.24 using port 23
\\NTFA.XSVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Claims Maintenance Menu** sub screen, select **[2] Work with Claims** and press **[ENTER]**.



```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01000S          Quality environment-14th PTF      System:  S102M5LM
HFUCINB          Claims Management System      2/26/06  13:21:50
HFUCINARQ       Claims Maintenance Menu

Select one of the following:

    1. Work with Batches
    2. Work with Claims
    3. Work with Claimants
    4. Work with Coverages/Transactions
    5. Work with Suspended Transactions

    10. Add a batch of claims
    11. Add a claim
    12. Add a claim using directed screen flow
    13. Add claim first records only
    14. Add claimant to existing claim
    15. Add coverage to existing claimant
    16. Add transactions to existing coverage

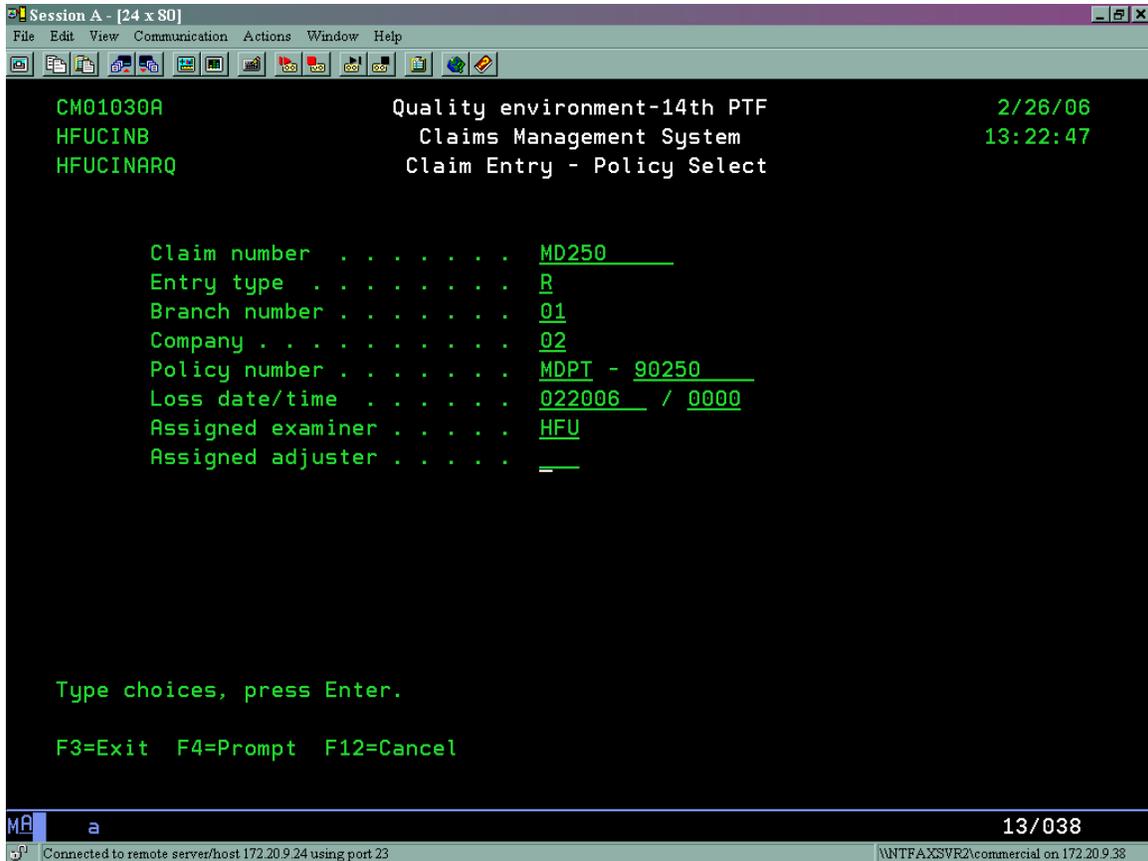
More...

Selection: 2_

F3=Exit      F12=Cancel

MA  a  21/014
Connected to remote server/host 172.20.9.24 using port 23  \\NTFAX.SVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Work with Claims** sub screen, press **[F6]** to add a new claim.



Add Instructions:

- Enter Claim Number. This is not a computer generated number. It is assigned specific to the policy prefix.
- Enter Entry Type. Prompt **[F4]**; select “R” (Report Only). A Report Only Claim is a claim that will have no transactions (reserves, payments...) posted against it. Report Only Claims are against actual policies stored in the Policy Processing portion of the system.
- Enter Branch Number. Prompt **[F4]**, select “01” (P&C) or “33” (Specialty).
- Enter Company. Prompt **[F4]**, select “01” (Specialty) or “02” (P&C).
- Enter Policy Number.
- Enter Loss Date.
- Assign Examiner. Prompt **[F4]**, select Examiner.
- Press **[ENTER]** to continue.

The system now prompts to the **Add Occurrence** screen. Some information is already generated. The Add Occurrence screen consists of three pages.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help

CM01031A Quality environment-14th PTF 2/26/06
HFUCINB Claims Management System 13:24:45
HFUCINARQ Add Occurrence Page 1 of 3

Claim number . . . . : MD250 Company number . . . : 02
Client ID . . . . . : 000000001109 Policy number . . . : MDPT - 90250
Branch number . . . . : 01 Claim status . . . . : E - Entered

Claim entry type . . . . : R - Report Only
Loss reported by . . . . : Mr. Insured
Loss date/time . . . . . : 2/20/06 / 0000
Policy type/state . . . . : H4 / MD
Policy eff/exp date . . . . : 1/01/06 / 1/01/07
Facultative reinsurance . : - No Fac Reinsurance
Agent number . . . . . : 001 LM1001 MULTIFAMILY COMMUNITY
Insured name . . . . . : DANIEL COLUMBUS
Insured address . . . . . : 97445 LANDY AVENUE

Insured city/state/zip . . : Ridgely MD 21683
More...

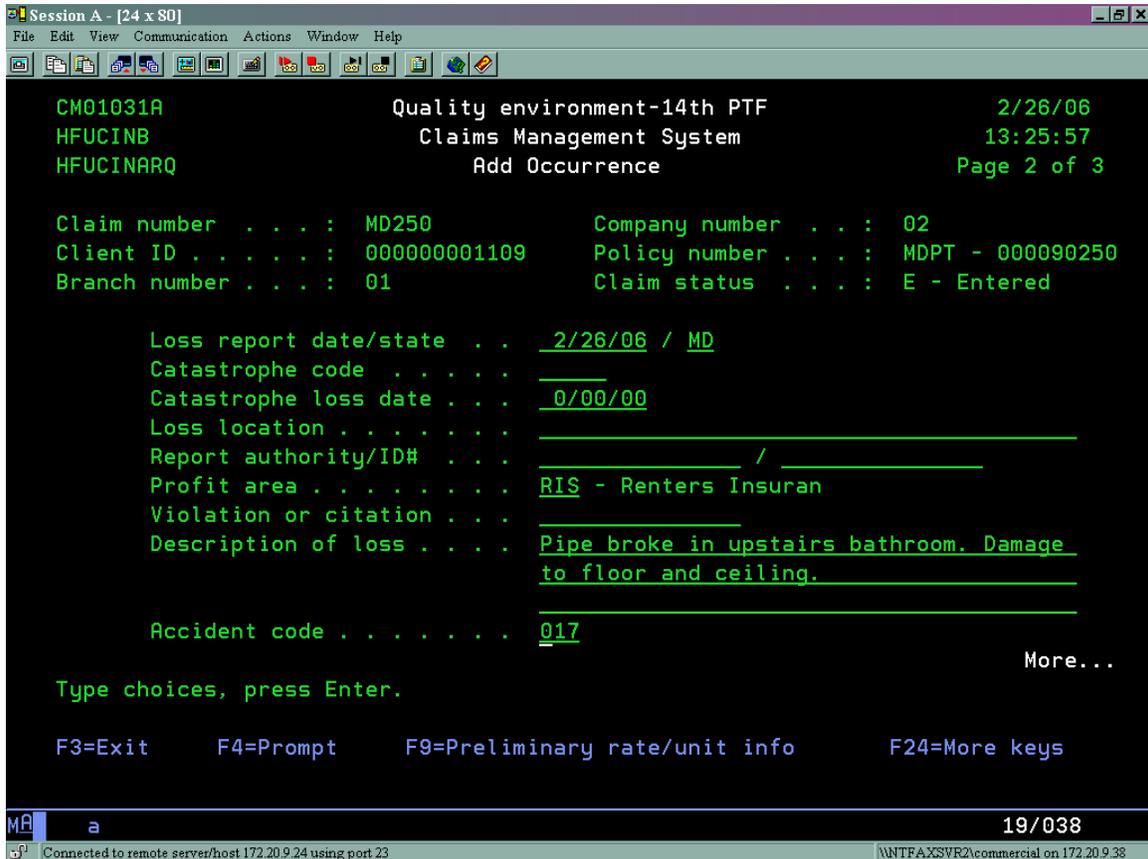
Type choices, press Enter.

F3=Exit F4=Prompt F9=Preliminary rate/unit info F24=More keys

MA a 10/049
Connected to remote server/host 172.20.9.24 using port 23 \\NTFA.XSVR2\commercial on 172.20.9.38
```

Add instructions:

- Enter Loss Reported By field. This is who reported the claim (i.e. Insured, Claimant Attorney...)
- Press **[ENTER]** to continue.



Add Instructions:

- Enter Loss Report State field.
- Enter Description of Loss field.
- Enter Accident Code. Prompt **[F4]**; select the appropriate code by entering "1" under the option column. Press **[ENTER]** to populate the field.
- Press **[Page Down]** to access page 3 of 3. These fields do not need to be filled out.
- Press **[ENTER]** to continue.

From the **Claims Management System-Claimant Counter** sub screen, enter the number of claimants to be added to the claim at this time. Press **[ENTER]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CM01040B Quality environment-14th PTF 2/26/06
HFUCINB Claims Management System 13:26:19
HFUCINARQ Claimant Counter

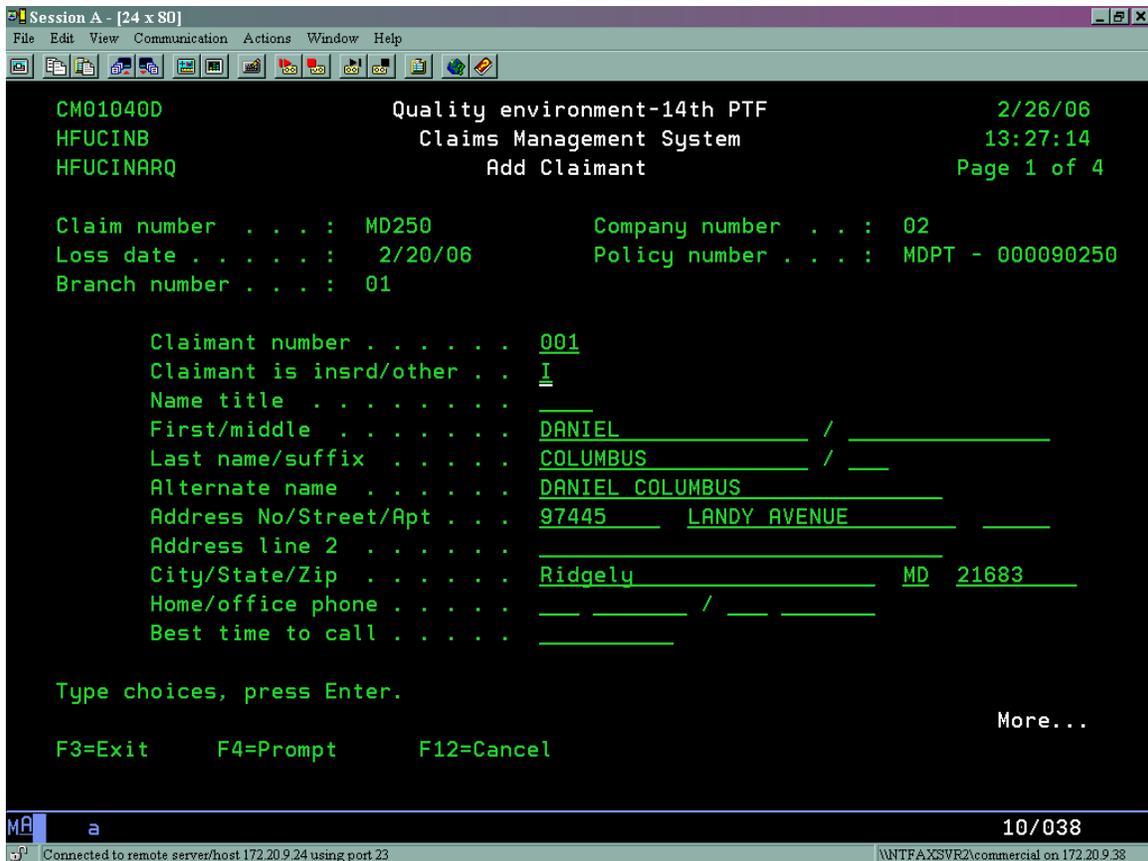
Number of claimants to add . . 001

Type choices, press Enter.
F3=Exit F12=Cancel

MA a 05/039
Connected to remote server/host 172.20.9.24 using port 23 \\NTFAXSVR2\commercial on 172.20.9.38
```

From the **Claims Management System-Add Claimant** sub screen enter the Claimant is insrd/other field. Prompt **F4**, select "I" for insured\*. Press **[Enter]** to populate remaining fields. Press **[ENTER]**.

**Note: The new claim will now be successfully added. No diaries will populate. If a diary is necessary consult Manual Diary Add section on page 21.**



\*Note:

If **[I]**nsured is entered then the insured's information will be added to the address fields.

**[O]**ther is relevant only with Personal or Commercial Auto Policies.

If **[N]**either is entered the information can be entered manually. Neither is used for third party claimants.

## Manual Diary Add-Report Claim Only

**Note: Use this feature only with Report Only Claims. Do not manually add a diary to a Verified Claim Set Up.**

From anywhere within the claim, select **[ESC]** to prompt the **CIS Workplace Shell**. Select **[5] Notepad** and press **[ENTER]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help

CM01031A
HFUCINB
HFUCINARQ

Claim number . . .
Client ID . . . .
Branch number . . .

Claim entry
Loss reporte
Loss date/ti
Policy type/
Policy eff/e
Facultative
Agent number
Insured name
Insured addr

Insured city

Press Enter to cont

F3=Exit    F11=Wor

2/26/06
13:33:27
Page 1 of 3

02
MDPT - 90250
E - Entered

IFAMILY COMMUNITY

21683

More...

F24=More keys

CIS Workplace Shell

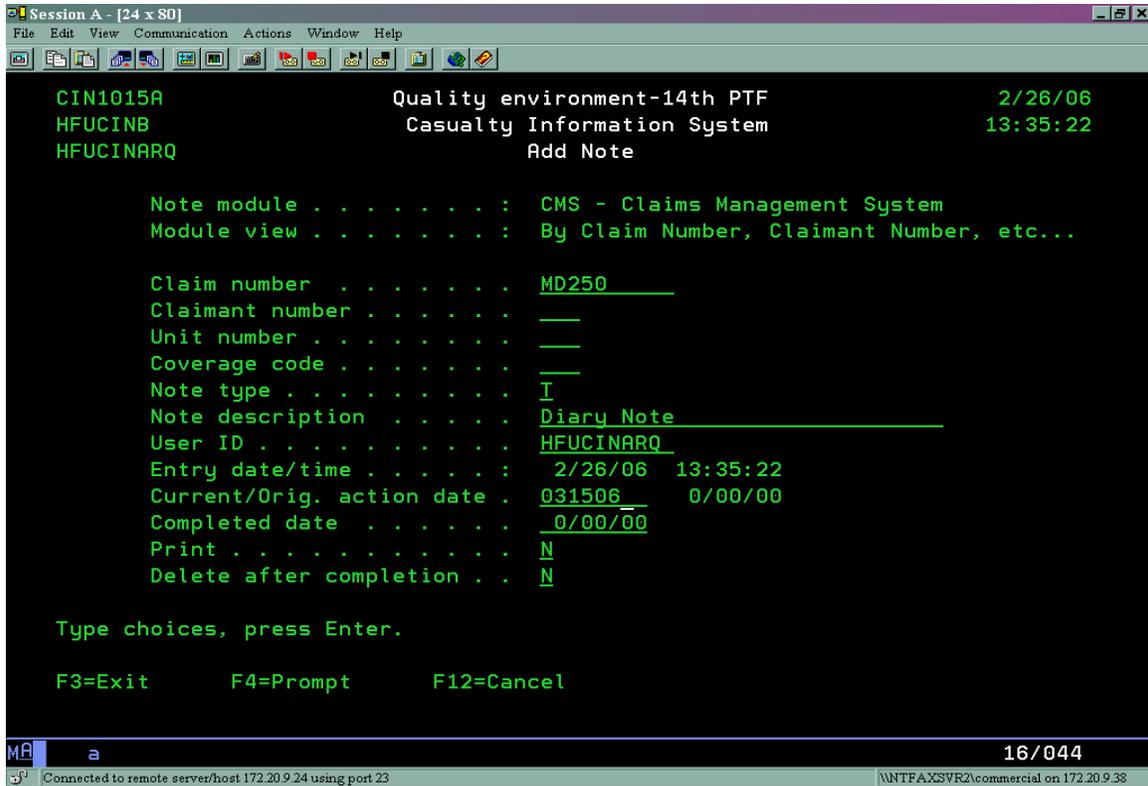
Select one of the following:
> 0. Main Job
  1. Policy Administration System
  2. Insurance Billing System
  3. Claims Management System
  4. Utility Menu
  5. Notepad
  6. WORK WITH SUBMIT JOB

User options:
  6. WORK WITH SUBMIT JOB

Selection: 5_

F3=Exit    F12=Cancel    F16=Options
```

From the **Casualty Information System-Work with Notes** sub screen, press **[F6]** to add a new diary note.



Add Instructions:

- Only the Claim Number should be populated at this point. If the Claimant Number, Unit Number or Coverage Code is populated delete the information.
- Enter the Note Type. Prompt **[F4]**; select “T” (Tickler Note).
- Enter the Note Description field. Example: “Diary Note”. This gives it a distinction from the file notes.
- Select the User ID. This will assign the correct adjuster to the diary note.
- Set Current/Orig. action date. This sets up the action date of the diary note.
- Press **[ENTER]** to access the Add Note field screen. Enter any notes such as your initials, followed by the date and the initials of the assigned adjuster.
- Press **[ENTER]** to add note.

\*Press **[F5]** to refresh the screen and view the newly added note.

### III. Populating the File Note

This is a note that can be accessed by anyone to enter general notes on the claim. This note should be set up after the new claim has been entered. The example below is set up in a Verified Claim.

From anywhere within the claim, select **[ESC]** to prompt the **CIS Workplace Shell**. Select **[5] Notepad** and press **[ENTER]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help

CM01031A
HFUCINB
HFUCINARQ

Claim number . . . .
Client ID . . . . .
Branch number . . .

Claim entry
Loss reporte
Loss date/ti
Policy type/
Policy eff/e
Facultative
Agent number
Insured name
Insured addr

Insured city

Press Enter to cont

F3=Exit    F11=Wor

2/23/06
14:28:15
Page 1 of 3

02
MDPT - 90210
E - Entered

IFAMILY COMMUNITY

21684

More...

F24=More keys

CIS Workplace Shell

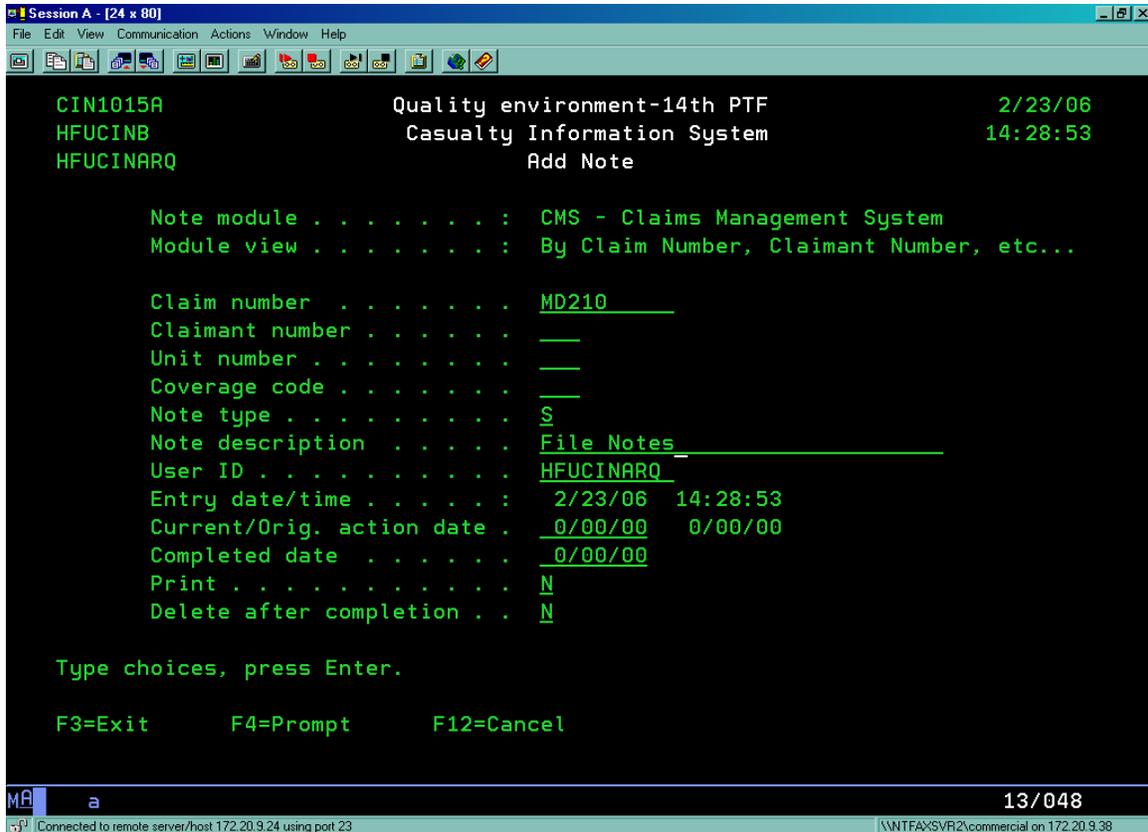
Select one of the following:
> 0. Main Job
  1. Policy Administration System
  2. Insurance Billing System
  3. Claims Management System
  4. Utility Menu
  5. Notepad
  6. WORK WITH SUBMIT JOB

User options:

Selection: 5_

F3=Exit    F12=Cancel    F16=Options
```

From the **Casualty Information System-Work with Notes** sub screen, press **[F6]** to add a new file note.



Add Instructions:

- Only the Claim Number should be populated at this point. If the Claimant Number, Unit Number or Coverage Code is populated delete the information.
- Enter the Note Type. Prompt **[F4]**, select “S” (Simple/Sticky Note).
- Enter the Note Description field. Example: “File Notes”. This gives it a distinction from the diary notes.
- Press **[ENTER]** to access the Add Note field screen. Enter any notes such as your initials, followed by the date and the initials of the assigned adjuster.
- Press **[ENTER]** to add note.

\*Press **[F5]** to refresh the screen and view the newly added note.

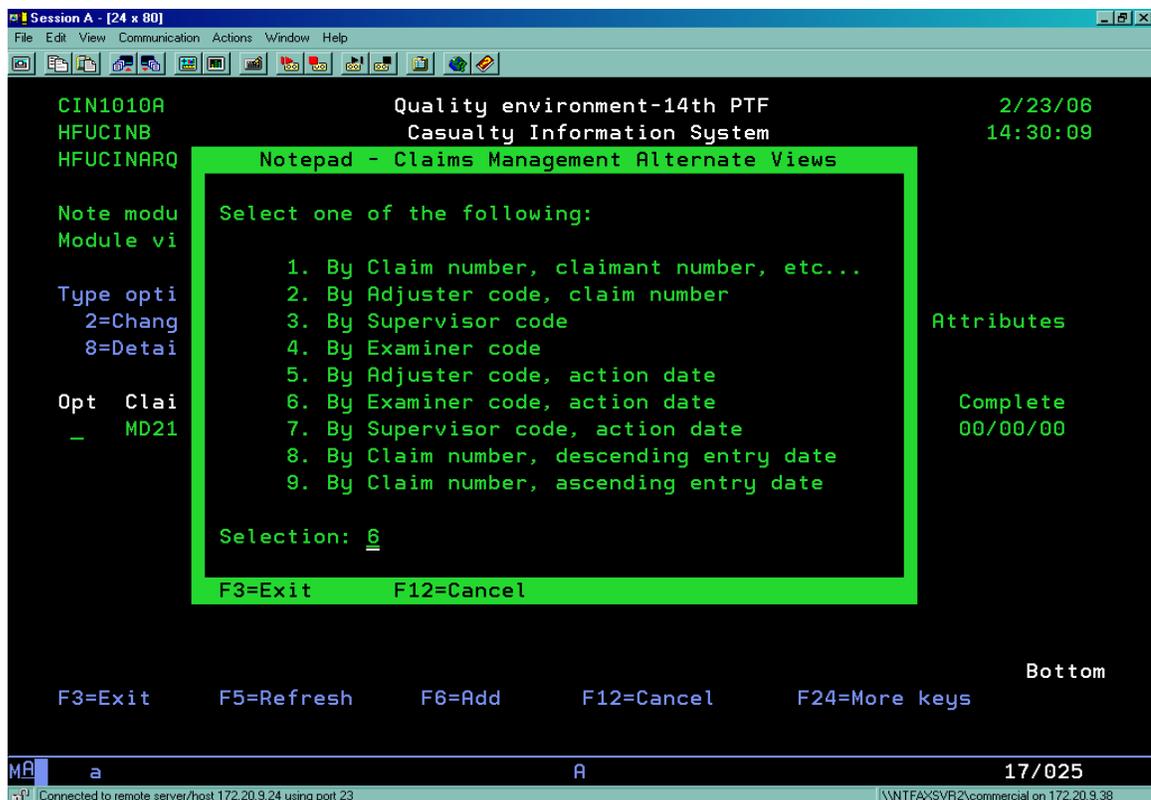
## 2. Claims Diary Management

### I. Changing/Viewing Diaries

The following will explain the process for viewing or changing the diary notes.

This option can be used to change the assigned adjuster/examiner or supervisor, action date, and subject heading of the diary/file note.

From anywhere within the claim, select **[ESC]** to prompt the **CIS Workplace Shell**. Select **[5] Notepad** and press **[ENTER]**. Select **[F11]\*** to prompt the **Claims Management Alternate Views** box. Select **[6] By Examiner code, action date\*\*** and press **[ENTER]** twice to continue.



\*The **[F11]** option can be made visible by **[SHIFT] [F12]**. This will prompt additional keys to show on the bottom of the screen.

\*\*To change the supervisor note, select **[7] By Supervisor code, action date** instead of **[6]**.

\*\*To view both the File Note and Diary Notes, select **[8] By Claim number, descending entry date**.

Select option **[8] Details** next to the note that is to be changed. Press **[ENTER]** to continue.

```

Session A - [24 x 80]
File Edit View Communication Actions Window Help
CIN1010A      Quality environment-14th PTF      2/23/06
HFUCINB      Casualty Information System      14:30:34
HFUCINARQ    Work with Notes

Note module . . . : Claims Management System
Module view . . . : By Branch, Examiner, Action Date

Type options, press Enter.
  2=Change  3=Copy  4=Delete  5=Display  6=Print  7=Print Attributes
  8=Details  9=Complete

Opt  Brnch  Exm  Claim No.  Description  Action  Complete
 8    01   HFU  MD210     New claim issued  03/09/06  00/00/00

F3=Exit  F5=Refresh  F6=Add  F12=Cancel  F24=More keys

Bottom

MA  a  A  13/003
Connected to remote server/host 172.20.9.24 using port 23  \\NTFAX\SVR2\commercial on 172.20.9.38
  
```

Make any desired changes to the note information, such as action date, assigned adjuster or subject heading of note. Press **[ENTER]** to continue. Press **[F5]** to refresh the screen and view changes.

```

Session A - [24 x 80]
File Edit View Communication Actions Window Help
CIN1015A      Quality environment-14th PTF      2/23/06
HFUCINB      Casualty Information System      14:31:59
HFUCINARQ

Note module . . . . . : CMS - Claims Management System
Module view . . . . . : By Branch, Examiner

Branch number . . . . . 01
Claim number . . . . . MD210
Examiner code . . . . . HFU
Note type/Description . . . I New claim issued
User ID . . . . . HFUCINARQ
Reviewed/Aging . . . . . 0
Last reviewed date . . . . . 0/00/00
Entry date/time . . . . . 2/23/06 14:27:36
Current/Orig. action date . 3/09/06 0/00/00
Completed date . . . . . 0/00/00
Print . . . . . N
Delete after completion . . N

Type choices, press Enter.

F3=Exit  F4=Prompt  F12=Cancel

MA  a  A  08/038
Connected to remote server/host 172.20.9.24 using port 23  \\NTFAX\SVR2\commercial on 172.20.9.38
  
```

## II. Assigning Diaries to Adjuster/Supervisor

The user has the ability to assign adjuster/examiner or supervisor. This will route the diary to the correct recipient.

From anywhere within the claim, select **[ESC]** to prompt the **CIS Workplace Shell**. Select **[5] Notepad** and press **[ENTER]**. Select **[F11]** to prompt the **Claims Management Alternate Views** box. To change the adjuster/examiner, select **[6] By Examiner code, action date** and press **[ENTER]** twice to continue. To change the supervisor note, select **[7] By Supervisor code, action date** instead of **[6]**.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CIN1010A          Quality environment-14th PTF          1/03/05
HFUCINB          Casualty Information System          07:47:07
HFUCINARQ
Note modu
Module vi
Type opti
  2=Chang
  8=Detai
Opt Clai
  _ MD21
Attributes
Complete
00/00/00
Bottom
F3=Exit F5=Refresh F6=Add F12=Cancel F24=More keys
MA a 17/025
Connected to remote server/host 172.20.9.24 using port 23
\\WNTFA.XSVR2\commercial on 172.20.9.38
```

Select option **[8] Details** next to the note that is to be changed. Press **[ENTER]** to continue.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
CIN1010A          Quality environment-14th PTF          1/03/05
HFUCINB          Casualty Information System          07:48:22
HFUCINARQ          Work with Notes

Note module . . . : Claims Management System
Module view . . . : By Branch, Supervisor, Action Date

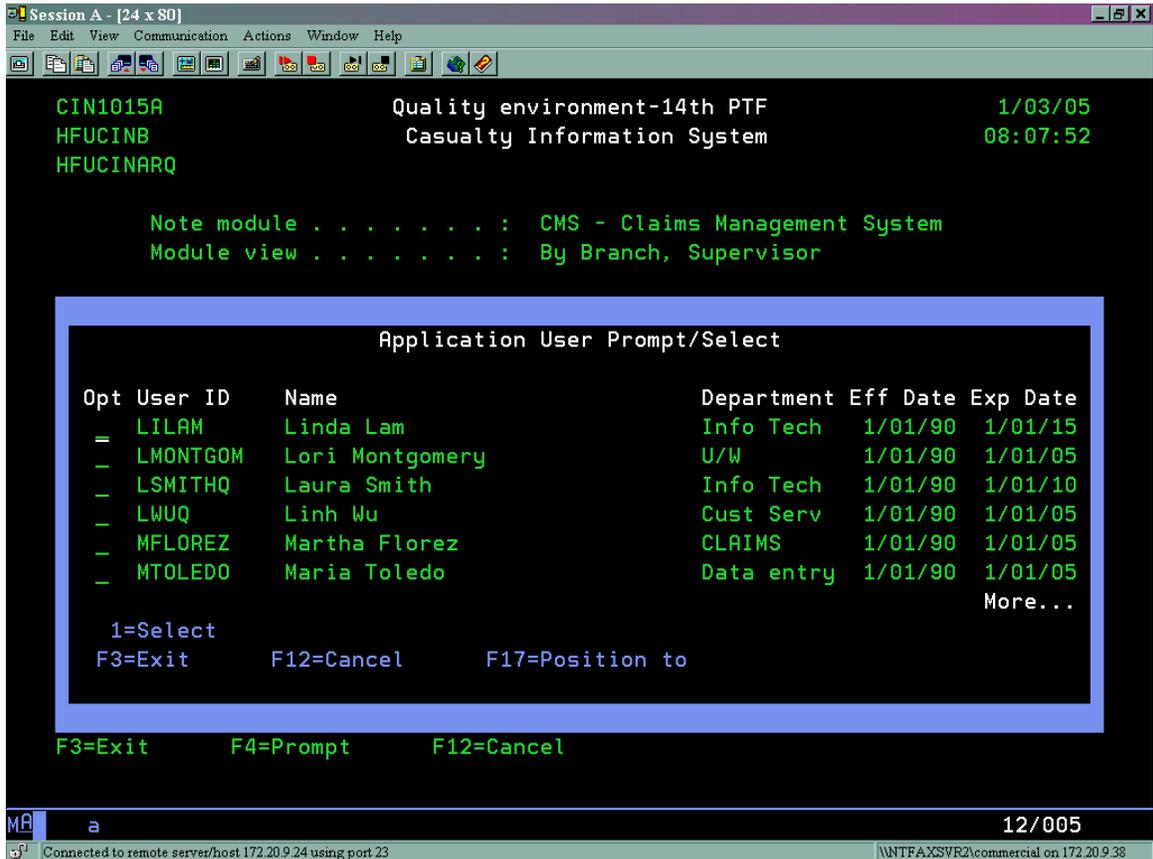
Type options, press Enter.
  2=Change  3=Copy  4=Delete  5=Display  6=Print  7=Print Attributes
  8=Details  9=Complete

Opt Brnch Spr Claim No. Description Action Complete
8  01  RDA  MD210  New claim issued  03/09/06  00/00/00

Bottom
F3=Exit  F5=Refresh  F6=Add  F12=Cancel  F24=More keys

MA a 13/003
Connected to remote server/host 172.20.9.24 using port 23
\\NTFAX.SVR2\commercial on 172.20.9.38
```

To assign a different adjuster/examiner or supervisor than is defaulted on the note, prompt **[F4]** on the User ID field and choose the correct adjuster.\* Press **[ENTER]** to make change. The diary note should now show on the chosen adjuster/examiner or supervisor's Display Action Notes screen.



\*Choose **[F17]** (**[SHIFT]** **[F5]**) to position to the name by entering the first initial or user ID.