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].

🗏 Session A - [24 x 80]			_ 8 ×
File Edit View Communication Actions Window Help			
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SISMENU HFUCINB HFUCINARQ	Quality environment-14th PTF SIS Main Menu	System: 2/23/06	S102M5LM 14:12:14
Select one of the follo	wing:		
 Client Data Bas Policy Administ Insurance Billi Claims Manageme Statistical Rep Casualty Inform Change Job data Sign off 	e System CDB ration System ALP ng System IBS nt System CMS orting System SRS ation System CIS for Testing		
Selection: <u>4</u>			
F3=Exit F6=Display	messages F12=Cancel		
M <u>A</u> a			21/014
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From the **Claims Management System-Main Menu**, select **[1] Claims Maintenance Menu** and press **[ENTER]**.

Bession A - [24 x 80] File Edit View Communication Actions Window Help			
CMSMENUS HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Main Menu	System: 2/23/06	S102M5LM 14:15:13
Select one of the follow	ing:		
1. Claim maintenanc	e menu		
 Draft maintenanc 	e menu		
3. Inquiry menu			
4. Report menu			
5. Miscellaneous ut	ility menu		
90. Sign off			
Selection: <u>1</u>			
F3=Exit F12=Cancel			
	(C) Copyright Specialty I	nsurance Servi	ce 1996
M <mark>A</mark> a			21/014
🖞 Connected to remote server/host 172.20.9.24 using port 23		\\NTFAXSVR2\co	mmercial 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 Communi	cation Actions Window Help		
CM01000S HFUCINB HFUCINAR	Quality environment-14th PTF Claims Management System Q Claims Maintenance Menu	System: 2/23/06	S102M5LM 14:15:39
Select o	ne 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
Selectio	n: <u>2</u>		
F3=Exit	F12=Cancel		
M <mark>A</mark> a			21/014

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

Session A - [24 x 80] File Edit View Communication Actions Window Help		_BX
CM01030A HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Claim Entry - Policy Select	2/23/06 14:23:23
Claim number Entry type Branch number Company Policy number Loss date/time . Assigned examiner Assigned adjuster	<pre>MD210 MD210 MD210 MD210 MD210 MD21 MD2 MD2 MD2 MD2 MD2 MD2 MD2 MD2 MD2 MD2</pre>	
Type choices, press Enter F3=Exit F4=Prompt F12=	r. Cancel	
MA a		13/038

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.

Image: Session A - [24 x 80] File Edit View Communication Actions Window Help Image: Session Report File Image: Session Report File <th></th> <th>_ @ X</th>		_ @ X
CM01031A Q HFUCINB HFUCINARQ	uality environment-14th PTF Claims Management System Add Occurrence	2/23/06 14:23:53 Page 1 of 3
Claim number : MD2 Client ID : 000 Branch number : 01	10 Company number 000001067 Policy number Claim status	: 02 : MDPT - 90210 : E - Entered
Claim entry type . Loss reported by . Loss date/time Policy type/state . Policy eff/exp date Facultative reinsur Agent number Insured name Insured address	: V - Verified <u>Mr. Insured</u> <u>2/20/06</u> / <u>0000</u> : H4 / MD : 2/25/05 / 2/25/06 ance . : - No Fac Reinsurance : 001 LM1001 MUL : GARY WASHINGTON : 97840 DAVENPORT WAY	TIFAMILY COMMUNITY
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

Add instructions:

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

Page 2 of 3 of the Add Occurrence Screen.

💵 Session A - [24 x	80]		
File Edit View Com	munication Actions Window Help		
CM0103 HFUCINI HFUCINI	1A Quality en B Claims M ARQ Add	vironment-14th PTF anagement System Occurrence	2/23/06 14:24:21 Page 2 of 3
Claim Client Branch	number : MD210 ID : 000000001067 number : 01	Company number : Policy number : Claim status :	02 MDPT - 000090210 E - Entered
	Loss report date/state Catastrophe code Catastrophe loss date Loss location Report authority/ID#	<u>2/23/06</u> / <u>MD</u> <u>0/00/00</u> <u>/</u> RIS - Benters Insuran	
	Violation or citation Description of loss	<u>Windstorm blew shingles fr</u> roof.	om dwelling
	Accident code	<u>012</u>	More
Type cl	noices, press Enter.		
F3=Exi	t F4=Prompt F9=Prelim	inary rate/unit info	F24=More keys
м <mark>А</mark> а			19/038
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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]**.

File Edit View Communication Actions Window Help	
CM01811A Quality environment-14th PTF HFUCINB Claims Management System HFUCINARQ Unit selection	2/23/06 14:24:41
Claim number : MD210Company number : 02Loss date : 2/20/06Policy number : MDPTBranch number : 01Effective date : 2/25Expiration date : 2/25	- 000090210 5/05 5/06
Type options, press Enter. 1=Select	
Opt Unit Description Identification/Serial M <u>1</u> 001 TENANT	No.
F3=Exit F12=Cancel	14/003

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]		
	3 <u>9 40</u>	
CM01040B HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Claimant Counter	2/23/06 14:25:07
Number of claimants	to add <u>001</u>	
Tupe choices, press Ente	r.	
igpe chordes, piess chee		
F3=Exit F12=Cancel		
M <u>A</u> a		05/039
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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 HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Add Claimant	2/23/06 14:25:40 Page 1 of 4
Claim number : M Loss date : Branch number : O	ID210Company number :2/20/06Policy number :01	02 MDPT - 000090210
Claimant number . Claimant is insrd Name title First/middle Last name/suffix Alternate name . Address No/Street Address line 2 . City/State/Zip . Home/office phone Best time to call		-
Type choices, press Ente F3=Exit F4=Prompt	er. F12=Cancel	More
M <mark>A</mark> a		10/038
GP 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 Image: Imag					
CM01821A HFUCINB HFUCINARQ	Quality environme Claim Managemen Coverage Sele	ent-14th it Syste ection	PTF m	2 14	!/23/06 !:26:13
Claim number : Loss date : Branch number : Claimant number :	MD210 Co 2/20/06 Po 01 001 - GARY WASHINGT	ompany n olicy nu ⁻ ON	umber mber	: 02 : MDPT - 0	00090210
Type options, press En 1=Select	ter.				
Opt Unit _ 001 - TENANT	Coverage ADR - ADD RES REN	Class	Limits		Value
_ 001 - TENANT _ 001 - TENANT 1 001 - TENANT	BUP - BUS PURS CCI - CREDIT CARD COC - COV C-PER P	TEACH	1000		63,000
001 - TENANT 001 - TENANT 001 - TENANT	COD - COV D-LOU COE - COV E-LIAB		100000		25,200
OOI - TENANT OOI - TENANT	COP - CONTENTS PL		1000		+
F3=Exit F9=Add non-po	licy coverage F12=C	ancel	F13=Select	additional	units
Connected to remote server/host 172.20.9.24 using port 23				\\NTFAXSVR2\comme	20/003 rcial 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.

CI Session A - [24 x 80] File Edit View Communication Actions Window Help DI File A Rev Ro Hell III III Rev Ro III Rev	X
CM01050D Quality of	environment-14th PTF 2/23/06
HFUCINB Claims	Management System 14:27:05
HFUCINARQ Add Cove	erage Transactions Page 1 of 3
Claim number : MD210	Company number : 02
Loss date : 2/20/06	Policy number : MDPT - 000090210
Branch number : 01	Claim type : Verified
Claimant	: 001 - GARY WASHINGTON : 1 : COC - COV C-PER PROP : / 63.000 /
Deductible type / %	: / .0000
Bureau/Client class code :	: /
Exposure/Coverage type	: Verified
Minor coverage option	:
Reported date / Examiner	: <u>2/23/06</u> / <u>HFU</u>
Cause of loss	: <u>1</u> 3 - Windstorm
Type of loss	:
Type choices, press Enter.	More
F3=Exit F4=Prompt F10=Inquiry	F12=Cancel F13=Coverage summary
MA a	19/038 \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\

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*.

₽ <mark>.</mark> Session A - [24 x 80]		
File Edit View Communication Actions Wind	ow Help 9 🛃 🔊 🖪 🗊 💓 🔗	
CM01050D HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Add Coverage Transactions	2/23/06 14:27:37 Page 3 of 3
Claim number Loss date Branch/Company .	. : MD210 Policy number : . : 2/20/06 Claimant/Unit : . : 01 / 02 Coverage/Class :	MDPT - 000090210 001 / 001 COC /
Type options or ch 4=Delete 8= Opt Trn date Coc	noices, press Enter. =Draft 9=Draft correction de Amount Adj Draft Vendor Tra	n. Description
<u>2/23/06</u> <u>2/23/06</u> 2/23/06		·
<u>2/23/06</u> <u>2/23/06</u>		
2/23/06 2/23/06		+
<u></u>		More
Examiner diary ent	ry written.	Jammer g
MA a X ()		16/025

* 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].

3 Session A - [24 x 80] File Edit View Communication Actions Window	Help		_ <u>-</u>
	🛃 🧾 🌒 🔗		
SISMENU HFUCINB HFUCINARQ	Quality environment-14th PT SIS Main Menu	F System: 2/26/06	S102M5LM 13:16:16
Select one of the follo	wing:		
 Client Data Bas Policy Administ Insurance Billi Claims Manageme Statistical Rep Casualty Inform Change Job data Sign off 	e System C ration System A ng System nt System C orting System S ation System C for Testing	DB LP BS MS RS IS	
Selection: <u>4</u>			
F3=Exit F6=Display	messages F12=Cancel		
M <u>A</u> a			21/015
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From the **Claims Management System-Main Menu**, select **[1] Claims Maintenance Menu** and press **[ENTER]**.

Session A - [24 x 8 File Edit View Com	80]	<u>_ 8 ×</u>
CMSMENUS HFUCINB HFUCINAR	GQuality environment-14th PTFSystem:Claims Management System2/26/06RQMain Menu	S102M5LM 13:21:07
Select o	one of the following:	
1. 2. 3. 4. 5. 90.	Claim maintenance menu Draft maintenance menu Inquiry menu Report menu Miscellaneous utility menu Sign off	
Selectio	on: <u>1</u>	
F3=Exit	F12=Cancel (C) Copyright Specialty Insurance Servi	ce 1996
MA a		21/014
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From the **Claims Management System-Claims Maintenance Menu** sub screen, select [2] Work with Claims and press [ENTER].

Ed. Edd Hirms (Assumption Astrono Blinders Hale		
File Edit View Communication Actions Window Help		
CM01000S Quality environment-14th PTF S HFUCINB Claims Management System HFUCINARQ Claims Maintenance Menu	ystem: 2/26/06	S102M5LM 13:21:50
Select one of the following:		
 Work with Batches Work with Claims Work with Claimants Work with Coverages/Transactions 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 Selection: <u>2</u> F3=Exit F12=Cancel		More
MB a	WATEA XSVE2	21/014

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

CISession A - [24 x S0] File Edit View Communication Actions Window H	lelp	_ <u>_</u> 5X
CM01030A HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Claim Entry - Policy Select	2/26/06 13:22:47
Claim number Entry type Branch number Company Policy number Loss date/time . Assigned examiner Assigned adjuster	<pre>MD250 MD250 R MD250 R MD250 N MD250 N MDPT - 90250 N MDPT - 9025 N MDPT - 902 N MDPT - 902 N MDPT - 902 N M MDPT - 902 N M M M M M M M M M M M</pre>	
F3=Exit F4=Prompt F12=0	Cancel	
	a	13/038

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 S0] File Edit View Communication	Actions Window Help		_ 5 X
CM01031A HFUCINB HFUCINARQ	Quality en Claims M Add	vironment-14th PTF anagement System Occurrence	2/26/06 13:24:45 Page 1 of 3
Claim number Client ID Branch number	: MD250 : 000000001109 : 01	Company number : Policy number : Claim status :	02 MDPT - 90250 E - Entered
Claim Loss r Loss d Policy Policy Facult Agent Insure Insure	entry type : eported by ate/time type/state eff/exp date ative reinsurance . : number d name d address	R - Report Only <u>Mr. Insured</u> <u>2/20/06</u> / <u>0000</u> <u>H4</u> / <u>MD</u> <u>1/01/06</u> / <u>1/01/07</u> - No Fac Reinsurance <u>001 LM1001</u> MULT <u>DANIEL COLUMBUS</u> <u>97445 LANDY AVENUE</u>	IFAMILY COMMUNITY
Insure	d city/state/zip	Ridgely <u>MD</u>	<u>21683</u> More
Type choices, F3=Exit F	press Enter. 4=Prompt F9=Prelim	inary rate/unit info	F24=More keys
MA a	st 172 20 9 24 using port 23		10/049

Add instructions:

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

Page 2 of 3 of the Add Occurrence Screen.

Session A - [24 x SO] File Edit View Communication Actions Window Help		_[5]X
CM01031A Quality e HFUCINB Claims HFUCINARQ Add	nvironment-14th PTF Management System Occurrence	2/26/06 13:25:57 Page 2 of 3
Claim number : MD250 Client ID : 00000000110 Branch number : 01	Company number : 9 Policy number : Claim status :	02 MDPT - 000090250 E - Entered
Loss report date/state Catastrophe code Catastrophe loss date Loss location Report authority/ID# Profit area Violation or citation Description of loss	<u>2/26/06</u> / <u>MD</u> <u>0/00/00</u> <u>/</u> <u>RIS</u> - Renters Insuran <u>Pipe broke in upstairs bat</u> to floor and ceiling.	hroom. Damage
Accident code	<u>017</u>	More
F3=Exit F4=Prompt F9=Preli	minary rate/unit info	F24=More keys
MA a	lu lu	19/038 NTFAXSVR2\commercial on 172,20.9.38

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]	Window Uste	
CM01040B HFUCINB HFUCINARQ	Quality environment-14th PTF Claims Management System Claimant Counter	2/26/06 13:26:19
Number of cla	imants to add <u>001</u>	
Type choices, pres	s Enter.	
F3=Exit F12=C	ancel	
	14	05/039
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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.

₽ <mark>1</mark> S File	ession A - [24 x 80] Edit View Communication Actions Window Help E A G S E E E G S C Actions Window Help	X
	CM01040D Quality environment-14th PTF HFUCINB Claims Management System HFUCINARQ Add Claimant	2/26/06 13:27:14 Page 1 of 4
	Claim number : MD250Company number. :Loss date : 2/20/06Policy number :Branch number : 01	02 MDPT - 000090250
	Claimant number	<u>MD</u> <u>21683</u>
	Type choices, press Enter. F3=Exit F4=Prompt F12=Cancel	More
м <mark>А</mark>	а	10/038
۵'	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.

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]**.



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

Session A - [24 x 80] File Edit View Communication Actions Window Help Image:	
CIN1015A Quality environment-14th PTF HFUCINB Casualty Information System HFUCINARQ Add Note	2/26/06 13:35:22
Note module : CMS - Claims Management S Module view : By Claim Number, Claimant	ystem Number, etc
Claim number <u>MD250</u> Claimant number <u>—</u> Unit number <u>—</u>	
Coverage code <u>—</u> Note type <u>T</u> Note description <u>Diary Note</u> User ID HFUCINARO	
Entry date/time : 2/26/06 13:35:22 Current/Orig. action date . <u>031506</u> 0/00/00 Completed date <u>0/00/00</u>	
Print <u>N</u> Delete after completion <u>N</u>	
Type choices, press Enter.	
F3=Exit F4=Prompt F12=Lancel	
ML a S ⁷ Connected to remote server/host 172.20.9.24 using port 23	16/044 \\NTFAXSVR2\commercial on 172.20.9.38

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]**.



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

Session A - [24 x 80] File Edit View Communication Actions Window Help Image: Imag	
CIN1015A Quality environment-14th PTF HFUCINB Casualty Information System HFUCINARQ Add Note	2/23/06 14:28:53
Note module : CMS - Claims Mana Module view : By Claim Number, U	gement System Claimant Number, etc
Claim number MD210 Claimant number	3 0
Print <u>N</u> Delete after completion <u>N</u>	
Type choices, press Enter.	
F3=Exit F4=Prompt F12=Cancel	
MD a	13/048

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.

Session A - [24 x 80]	s Astisses Villedon Hole				
CIN1010A HFUCINB HFUCINARQ	Quality environment-14th PTF Casualty Information System Notepad - Claims Management Alternate Views	2/23/06 14:30:09			
Note modu Module vi	Select one of the following: 1. By Claim number, claimant number, etc				
2=Chang 8=Detai	2. By Hojuster code, claim number 3. By Supervisor code 4. By Examiner code 5. By Adjuster code, action date	Attributes			
Opt Clai _ MD21	6. By Examiner code, action date 7. By Supervisor code, action date 8. By Claim number, descending entry date 9. By Claim number, ascending entry date	Complete 00/00/00			
	Selection: <u>6</u>				
	F3=Exit F12=Cancel				
F3=Exit	F5=Refresh F6=Add F12=Cancel F24=More	Bottom keys			
M <u>A</u> a	A	17/025			

*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.

■ <mark>■</mark> Session A - [24 x 80]				_ & ×
Edit View Communication Actions	: Window Help ■ 150 - 50 - 51 - 51 - 50 - 50 - 50 - 50			
CIN1010A HFUCINB HFUCINARQ	Quality enviro Casualty Info Work wi	onment-14th PTF ormation System ith Notes		2/23/06 14:30:34
Note module Module view	: Claims Management : By Branch, Examine	System er, Action Date		
Type options, p 2=Change 3= 8=Details 9=	press Enter. =Copy 4=Delete 5=Dig =Complete	splay 6=Print	7=Print Attr	ibutes
Opt Brnch Exm <u>8</u> 01 HFU	n Claim No. Descriptic J MD210 New claim	on issued	Action Co 03/09/06 00	mplete //00/00
F3=Exit F5=	=Refresh F6=Add	F12=Cancel	F24=More keys	Bottom
M <mark>A</mark> a		A		13/003
Connected to remote server/host 172.20	0.9.24 using port 23		\\NTFAXSVR2\co	mmercial 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.

C _ Session A - [24 x 80]		
E E E E E E E		
CIN1015A HFUCINB HFUCINARQ	Quality environment-14th PTF Casualty Information System	2/23/06 14:31:59
Note modu Module vi	lle : CMS - Claims Management System ew : By Branch, Examiner	n
Branch nu Claim num Examiner Note type User ID . Reviewed/ Last revi Entry dat Current/O Completed Print . Delete af	mber 01 mber M0210 code HFU code T vDescription T New claim issued	
Type choices, pr	ress Enter.	
F3=Exit F4=	Prompt F12=Cancel	
M <u>A</u> a	A	08/038

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]**.

³ Session A - [24 x 80]		_ B ×
File Edit View Communic	ration Actions Window Help	
CIN1010A	Quality environment-14th PTF	1/03/05
HFUCINB	Casualty Information System	07:47:07
HFUCINARQ	Notepad - Claims Management Alternate Views	
Note modu	Select one of the following:	
Module vi	4 Du Olein number eleinet number etc	
Tuna anti	I. By claim number, claimant number, etc 2. By Odiuston code, claim number	
2=Chang	2. By Hujuster Code, Ctalm Humber 3. Bu Supervisor code	Attributes
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0-betai	5. Bu Adjuster code, action date	
Opt Clai	6. Bu Examiner code, action date	Complete
MD21	7. Bu Supervisor code, action date	00/00/00
	8. By Claim number, descending entry date	
	9. By Claim number, ascending entry date	
	Selection: <u>7</u>	
	E2-Exit E12-Cancel	
		Bottom
F3=Exit	F5=Refresh F6=Add F12=Cancel F24=More	keys
мА а		17/025
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Select option **[8] Details** next to the note that is to be changed. Press **[ENTER]** to continue.

Session A - [24 x 80]	ion Astions Window Usta			_ 6	×
	E M b to d c	1 🔌 🤌			
CIN1010A HFUCINB HFUCINARQ	Qu	uality environment-1 Casualty Informatior Work with Note	L4th PTF n System es	1/03/05 07:48:22	
Note module Module view	: Claims : By Bra	s Management System anch, Supervisor, Ac	tion Date		
Type options 2=Change 8=Details	s, press Enter. 3=Copy 4=Do 9=Complete	elete 5=Display	6=Print 7=F	Print Attributes	
Opt Brnch <u>8</u> 01	Spr Claim No. RDA MD210	Description New claim issued	Ad 037	ction Complete /09/06 00/00/00	
F3=Exit	F5=Refresh	F6=Add F12=Car	ncel F24=M	Bottom More keys	
MA a				13/003	
Connected to remote server	/host 172.20.9.24 using port 23			\\NTFAXSVR2\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.

₽ <mark>1</mark> S File	ession A - [24 x 80] Edit View Communication Ac	tions Window Help			_	. 8 ×
	CIN1015A HFUCINB HFUCINARQ	Quality environment-14 Casualty Information	th PTF System		1/03/05 08:07:52	
	Note module : CMS - Claims Management System Module view : By Branch, Supervisor					
		Application User Prompt	/Select			
	Opt User ID LILAM LMONTGOM LSMITHQ LWUQ MFLOREZ MTOLEDO	Name Linda Lam Lori Montgomery Laura Smith Linh Wu Martha Florez Maria Toledo	Department Info Tech U/W Info Tech Cust Serv CLAIMS Data entry	Eff Date 1/01/90 1/01/90 1/01/90 1/01/90 1/01/90 1/01/90	Exp Date 1/01/15 1/01/05 1/01/10 1/01/05 1/01/05 More	
	F3=Exit F3=Exit F4	F12=Cancel F17=Position to				
ME S ^{P1}	a Connected to remote server/host 172	2.0.9.24 using port 23		WNTFAXSVR2	12/005 commercial on 172.20.9	9.38

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