
PeopleSoft Enterprise Policy and Claims Presentment 9.1 PeopleBook

October 2009

Copyright © 2001, 2009, Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

Hazardous Applications Notice

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Contents

Preface

PeopleSoft Enterprise Policy and Claims Presentment 9.1 Preface	vii
PeopleSoft Enterprise CRM Application Fundamentals	vii
PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals	viii
PeopleSoft Enterprise CRM Automation and Configuration Tools	ix
PeopleSoft Enterprise CRM 9.1 Services Foundation	ix
PeopleSoft Enterprise PeopleTools Documentation	x
PeopleBooks and the Online PeopleSoft Library	x

Chapter 1

Getting Started with PeopleSoft Enterprise Policy and Claims Presentment	1
Policy and Claims Presentment Overview	1
Policy and Claims Presentment Business Processes	2
Policy and Claims Presentment Integrations	3
Policy and Claims Presentment Implementation	3

Chapter 2

Understanding Policies and Claims	5
The Policy Data Model	5
Insured Items	6
Covered Assets in P&C	6
Policy Changes	7
Claims	8
First Notice of Loss	10
Claims Submission	11
FNOL Business Projects	12
Business Project Modifications	12
Claims Management	12

Chapter 3

Working with Policies 13

Working with Policies 13

 Pages Used to Work with Policies 13

 Establishing Insurance Asset Types 15

 Viewing Insurance Financial Accounts 15

 Viewing Relationships 20

 Viewing Terms and Conditions 20

 Viewing First Notices of Loss 21

 Viewing Address and Audit History 21

 Viewing Policies 22

 Viewing Asset Details 25

 Viewing Billing History 25

 Viewing Payment History 26

Changing Policies 28

 Pages Used to Change Policies 28

 Setting Up Actions 28

 Changing Policies 29

 Running the Change Policy Script 31

Chapter 4

Working with Claims 33

Managing FNOL Through a Customer Service Representative 33

 Pages Used to Manage FNOL Through a Customer Service Representative 33

 Initiating the FNOL 34

 Confirming Policy Details 35

 Creating the FNOL 36

 Reviewing the FNOL 38

Reviewing Claims 39

 Pages Used to Review Claims 40

 Reviewing Claims 40

 Viewing Claim Details 41

 Adding Notes to Claims 42

Chapter 5

Understanding Enterprise Integration Points for Policy and Claims Presentment 45

EIPs for Policy and Claims Presentment 45

Policy Creation EIP	45
Policy Application EIP	46
Billing History EIP	46
Payment History EIP	47
Change Policy EIP	48
FNOL EIP	49
Claim Header EIP	49
Claim Detail Display EIPs	49
Chapter 6	
Working with Policy and Claims Presentment Self-Service	51
Understanding Policy and Claims Presentment Self-Service	51
Self-Service Access	51
Self-Service Management	52
Prerequisites	52
Changing Policies in Self-Service	54
Pages Used to Change Policies in Self-Service	54
Administering Policies in Self-Service	54
Reporting a FNOL in Self-Service	55
Pages Used to Report a FNOL in Self-Service	55
Reviewing Financial Account Information	55
Reviewing Insurance Policy Details	56
Reporting FNOL	57
Viewing Claims in Self-Service	59
Page Used to View Claims in Self-Service	59
Reviewing Claim Details	59
Appendix A	
Delivered Web Services and Service Operations	61
Delivered Web Services	61
Policy Web Service	61
Claims Web Service	62
Viewing the Message Elements	62
Index	65

PeopleSoft Enterprise Policy and Claims Presentment 9.1 Preface

This preface discusses:

- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleSoft Enterprise PeopleTools documentation.

PeopleSoft Enterprise CRM Application Fundamentals

The *Policy and Claims Presentment 9.1 PeopleBook* provides implementation and processing information for your PeopleSoft Policy and Claims Presentment application. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called the *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

The *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft Enterprise CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft Enterprise CRM product line.

There are six parts to the *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*:

- PeopleSoft Enterprise CRM Multi-Product Foundation.

This part discusses the design and setup of the PeopleSoft Enterprise CRM system, including security considerations.

- Workforce Management.

This part discusses the administration of the worker component used to perform tasks such as customer support or field service in PeopleSoft Enterprise CRM. This part also includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

This part discusses interaction management and the administration of the 360-Degree View, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

This part discusses the set up, administration, and use of self-service applications for customers and workers.

- Relationship Management.

This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

This part discusses setting up agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Getting Started with PeopleSoft Enterprise Customer Relationship Management 9.1 Applications"

PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals

The *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook* consists of important topics that apply to many or all industry-specific applications within the PeopleSoft Enterprise CRM product suite. Whether you are implementing a single application or multiple PeopleSoft Enterprise CRM applications, you should be familiar with the contents of this central PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*:

- Application Security.

This part discusses setting up security including the security matrix and navigation security.

- Financial Accounts.

This part discusses administration of financial accounts, legacy account systems integrations, product applications, and account default set up.

- Churn Management.

This part discusses churn scoring, churn scores, and churn rules as applied to financial accounts. This chapter also covers churn scripts and automated churn.

- Accounts Receivable and 360 - Degree View Integration.

This part discusses the integration between an Accounts Receivable system and PeopleSoft Enterprise CRM.

See Also

PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook, "Getting Started with PeopleSoft Enterprise CRM 9.1 Industry Applications"

PeopleSoft Enterprise CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple PeopleSoft Enterprise CRM applications. This is an essential companion to the application PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*:

- Correspondence management.

This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation tools.

This part discusses PeopleSoft Enterprise CRM workflow, Active Analytics Framework (AAF), business projects, and scripts.

- Configuration tools.

This part discusses configurable search pages, configurable toolbars, attributes, display templates, and industry-specific field labels and field values.

- Knowledge management.

This part discusses Verity search setup Verity search.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Getting Started with PeopleSoft CRM Automation and Application Configuration Tools"

PeopleSoft Enterprise CRM 9.1 Services Foundation

The *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise FieldService and the PeopleSoft Enterprise Call Center applications (PeopleSoft Enterprise Support, PeopleSoft Enterprise HelpDesk, and (PeopleSoft Enterprise HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*:

- Entitlement management.

This part discusses how solution management enables users to establish a set of predefined solutions that call center agents and field service technicians use to resolve customer problems.

- Transaction Billing Processor Integration.

This part discusses how PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. Also covered is how this integration enables PeopleSoft Enterprise CRM users to bill and book revenue for recurring, one-time, and on demand service.

- Environmental Systems.

This part covers the Research Institute (ESRI) integration. The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Getting Started with PeopleSoft CRM Services Foundation"

PeopleSoft Enterprise PeopleTools Documentation

Cross-references to PeopleSoft Enterprise PeopleTools documentation refer to the PeopleSoft Enterprise PeopleTools 8.50 PeopleBooks.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Chapter 1

Getting Started with PeopleSoft Enterprise Policy and Claims Presentment

This chapter provides an overview of Policy and Claims Presentment and discusses:

- Policy and Claims Presentment business processes.
- Policy and Claims Presentment integrations.
- Policy and Claims Presentment implementation.

Policy and Claims Presentment Overview

Policy and Claims Presentment utilizes the power of PeopleSoft Enterprise CRM and provides industry-specific functionality to meet your business needs. Policy and Claims Presentment enables you to provide full-featured support for all the products and services you offer to customers.

To support the unique data requirements of life, health, and property and casualty policy types, service representatives can:

- Respond to customer inquiries by accessing policy details.

This includes status, type, and coverage period, deductibles, limits, options, as well as covered people and assets.

- Make changes to a policy.
- Retrieve billing and payment history in real-time.

Policy and Claims Presentment provides the ability to work with industry-specific policy requirements including:

- Property & Casualty policies

Displays for each covered person or asset the coverage that has been selected, as well as the deductible amounts, limits, options, and exclusions.

- Health plan policies

Displays the benefits that apply to the plan, coinsurance for each service, yearly deductible, and lifetime limits.

- Life plan policies

Displays the death benefit amount and financial terms associated with the policy, insured party and beneficiaries, and current policy cash value.

- All policy type

Displays premium information, policy status, agent and broker associated with selling the policy, and the entity responsible for servicing the policy.

Regardless of the channel, Policy and Claims Presentment enables the representative to respond to customer inquiries including claim status, claimant information, assigned adjusters, assessed damages, and settlement payments processed.

A customer, or an insurer's representative on behalf of a customer, can file a first notice of loss via the web-based user interface. Policy and coverages are verified and then, based on policy type, details of the loss such as; date/time, location, policy report, injuries and damages, and other parties/property involved are captured. When submitted, the report is packaged as an XML message and is sent to the insurer's claims management system. The claims management system responds by creating and sending back a claim number that is stored in the PeopleSoft CRM database. Users can then inquire on claim status and details.

Note. This PeopleBook focuses on the set up and usage of Policy and Claims Presentment functionality and does not discuss core PeopleSoft Enterprise CRM setup or usage. It is highly recommended that you review the references that appear in each chapter before beginning the implementation.

Policy and Claims Presentment Business Processes

The following summarizes Policy and Claims Presentment business processes:

- Policy management
- Claims management.
- Self-service transactions.

We discuss these business processes in the business process chapters in this PeopleBook.

Policy Management

Policy and Claims Presentment enables users to:

- Work with covered assets.
- Manage policies, including relationships, terms and conditions, address history, asset details, manage billing history and payment history.
- Make policy changes.

Claims Management

Policy and Claims Presentment enables users to:

- Manage first notice of loss (FNOL) reporting through a customer service representative.
This includes initiating a first notice of loss (FNOL) and confirming policy details.
- Work with First Notice of Loss (FNOL).
This includes associating a first notice of loss (FNOL) to related claims.
- Work with claims, including viewing claims and claim details.

Self-Service Transactions

Policy and Claims Presentment enables self-service users to:

- Perform customer care transactions, including creating a first notice of loss (FNOL), searching for solutions, and viewing frequently asked questions and troubleshooting guides.
- Make policy changes.
- Select and apply for products.
- Report a first notice of loss (FNOL).
- View claims.

Policy and Claims Presentment Integrations

PeopleSoft provides the flexibility to address your unique requirements for integrating applications and data. PeopleSoft's Integration Broker supports real-time, two-way integration to legacy systems whether it be your ratings engine, policy administration system, claims management system, or billing system. Our pre-built integration enables users to access data in these legacy systems, without requiring them to extract, load and continuously synchronize that data into the CRM solution. The Integration Broker provides pre-built Enterprise Integration Points (EIPs) that support message triggers, message routing, and any data transformation that must take place for both inbound and outbound messages. With it, the PeopleSoft CRM for Insurance solution can retrieve data from your legacy systems at run time, unify and display that data, manipulate it, and send it back to the source. This is a huge advantage in terms of solution deployment time and cost, ongoing cost of ownership, and quality customer service.

Policy and Claims Presentment Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface"

PeopleSoft Enterprise Setup Manager for CRM 9.1 PeopleBook

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Component Interfaces, "Using the Excel to Component Interface Utility"

Chapter 2

Understanding Policies and Claims

This chapter introduces the main concepts for policy and claims presentment. It discusses:

- The policy data model.
- Insured items.
- Claims
- First notice of loss (FNOL)
- Claims submission
- Claims management

The Policy Data Model

A *policy* is an insurance contract that states what is being insured, by whom, and for how much. It contains data that both the policyholder and the insurance company need to understand what the policyholder is insured for, the insured item, what coverages apply, for how long the insurance is effective, and how much the policyholder agrees to pay in premiums. In Policy and Claims Presentment, an insurance policy is a type of financial account.

A *financial account* represents a holding by the customer of a product that an insurance company provides. The financial account presents information from various legacy systems in a consistent interface. The financial account maps to the product, inheriting the terms and conditions from the product that the customer purchased.

The legacy administration systems create the financial account record and its sub-records as a policy. These accounts are not created in the PeopleSoft Enterprise CRM system. The Product Sales functionality queues up a transaction to the legacy system, which starts the process of creating a new account header record for the policy and its sub-records; the legacy system performs the actual creation of these records, and a message comes back from the legacy system to create the data structure in the PeopleSoft Enterprise CRM system.

Each financial account record represents one policy. If a business contact has two policies, there will be one financial account instance in the database for each. You can attach coverage at several levels in the data model. Coverage can be at either the policy or the covered asset level.

Use the Financial Account pages to view general account information, insurance account details, and policy information. Use the View Policy pages to view covered assets, including coverages, deductibles, limits, and options.

Insured Items

This section provides an overview of insured items and discusses:

- Covered assets in property and casualty (P&C).
- Policy changes.

Insured items, or *covered assets*, are related to a policy as the specific thing insured against loss. Policies may be written for many insured items, or for only one. For example, usually, a life policy has one insured item for a person's life while a household policy insures many items. Some companies write a car insurance policy that includes many vehicles, while other companies create a one-to-one policy to insured items. For group policies, there are many insured items.

Insured items can be a person, a place, or a thing. You must collect specific information regarding the item that is to be insured. This data includes the specific attributes that make up the item to avoid confusion regarding what or who is insured, and so you can price the policy accurately. Based on the type of insured item, you may need different types of information.

Each insurance policy has at least one covered asset. In property and casualty (P&C) lines of business, these assets are the items that the policy insures. In life or health policies, the covered asset is the insured person or persons. Covered assets can be of different types, and each can have different attributes. For example, when a car is insured, you must capture the vehicle identification number (VIN), whereas when a person is insured, you must capture the social security number. You can view a given policy's details, such as insured items for P&C, coverage, dollar limits, deductibles, options, and exclusions. The data elements that appear depend on the policy type.

Covered Assets in P&C

For P&C, insured items are assets. These assets may include a car, a boat, a home, a wine collection, and so on. Assets have a value, and the purpose of insuring them is to protect the use or enjoyment of the asset. Covered assets are insured against loss by the policy.

Generally, P&C covered assets or insured items include:

- Personal vehicles, including cars, minivans, pickup trucks, and sport utility vehicles.
- Commercial vehicles, including trucks, commercial vans, tractors, and combines.
- Boats, including sail, motor, and yachts.
- Commercial boats, including fishing boats.
- Mobile homes.
- Personal real estate, including single-family dwellings such as apartments, condominiums, townhouses, houses, duplexes, triplexes, and four-unit or fewer apartments where the owner also lives.
- Commercial real estate, including major apartment buildings, office buildings, commercial stores, shopping centers, and undeveloped, raw land.
- Personal property, including art work, jewelry, furs, computers, and wine collections.

- Commercial property, including equipment, machinery, and aircraft.

Insured items share some common characteristics. Each item:

- Is either owned or leased for use and is associated in some way to a business contact as owner, primary user, or lessor.
- Is related to insurance policies (a type of financial contract).
- Has a dollar value.
- Has a location or primary location.

For example, a boat is moored at an address, a car is garaged at an address, a house has an address, an apartment building has an address, equipment is located in a primary location (an address or maybe a site), and personal property is either at one's home or in a safe deposit box, both of which would have an address or location.

- Has attributes that are necessary to describe the item for authentication.

For example, the VIN, make, model, type, and year uniquely describe a car. A home's particular location, address, or housing tract number in the county records uniquely authenticates a house (title insurance information). The name of the producer, vineyard, or estate name; country of origin; and the year of vintage authenticate a bottle of wine.

- Can have additional attributes to provide more detail to the description.

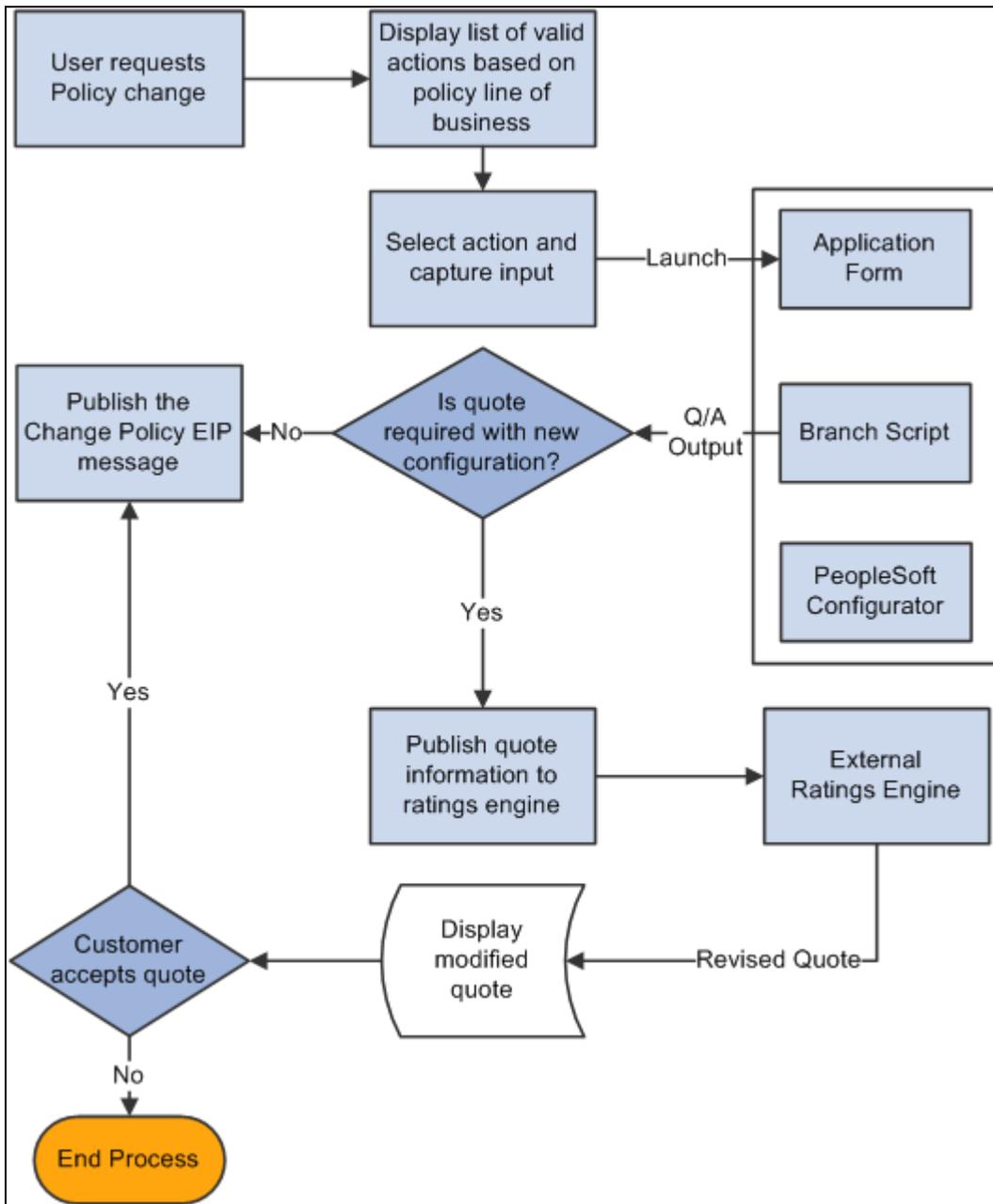
For example, attributes that may be related to risk, help the insurance company determine ratings or assess risk.

Policy Changes

An insurance policyholder may request a change to the policy. The PeopleSoft Enterprise CRM system captures all of the modification information and transmits it to the legacy system. Modifications to the policy may or may not require a quote, depending on the requested change. For example, changing the beneficiary on a life insurance policy does not require a quote because it does not impact the premium; however, a change in coverage on an automobile policy does require a quote because the premium may change. If a quote is required because of the requested change, the system returns the quote that the legacy system generates. If the user chooses to continue with the new quote, a message is sent to legacy system requesting the modification. The actual modification takes place in the legacy system.

Modification options are product-specific. The owner of an auto insurance policy may want to add a driver to the policy; however, this is not an option for a life insurance policy. Each modification is set up as an action type, and the actions are linked to the product itself. When you link the action to the product, that modification option becomes available to the policyholder. Set up the allowable actions in the Action component (for example, adding a driver is a valid action that can be linked to auto insurance product).

This diagram illustrates the process flow for policy changes, such as user requests, application form and quote information publishing:



Policy change process flow

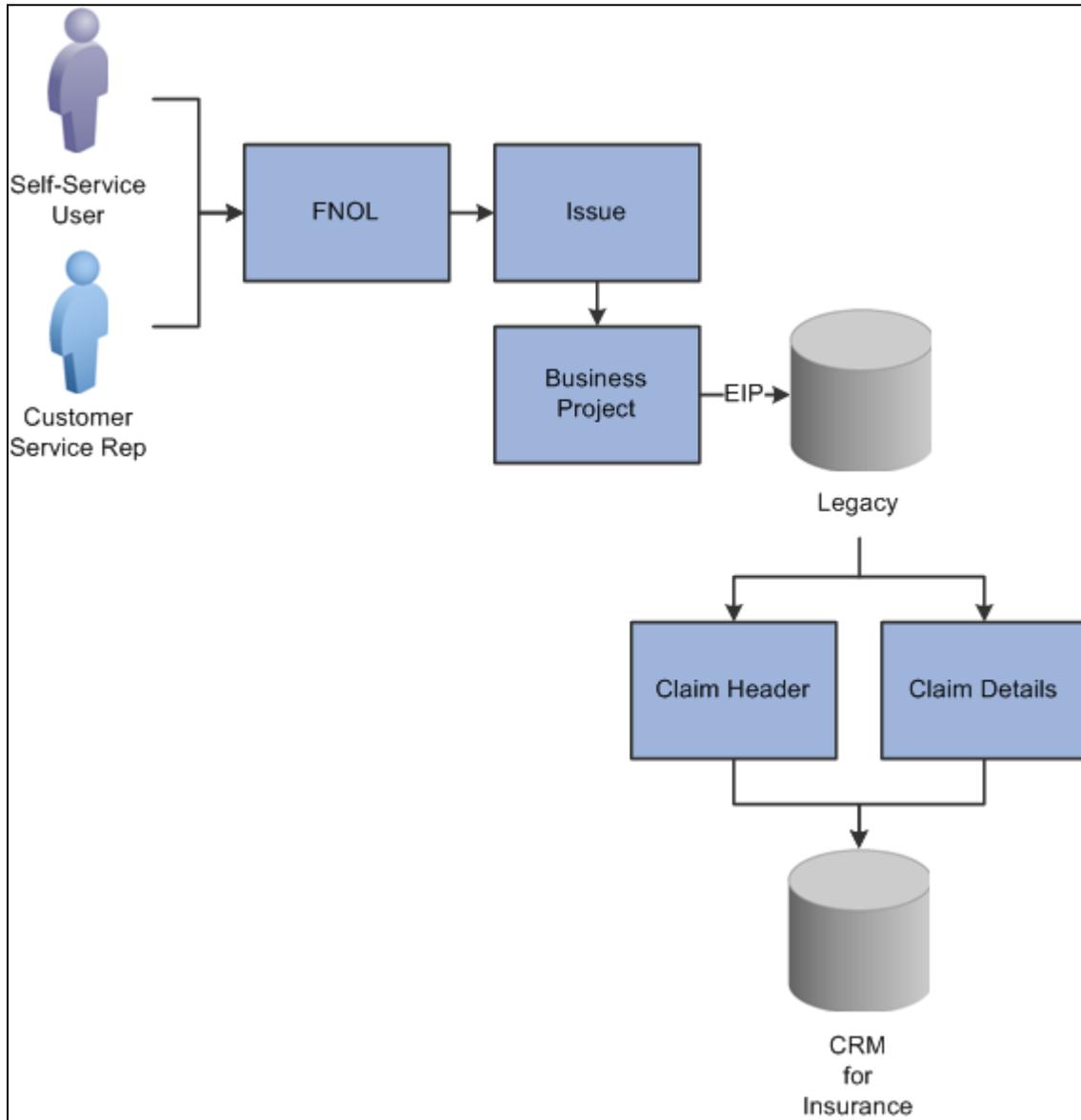
Claims

In Policy and Claims Presentment, self-service users and customer service representatives can file claims. The first notice of loss initiates the claims process by capturing the event information that eventually triggers a business project. At the end of the business project, a message is sent to the legacy system with all of the captured information.

The legacy system creates, stores, and maintains claim details. Each claim has a header and a detail section. The claim header is stored in the PeopleSoft Enterprise CRM system and is created by an asynchronous message from the legacy system to the PeopleSoft Enterprise CRM system. Claim details can be either fetched from the legacy system on request using synchronous messaging or stored in the PeopleSoft Enterprise CRM system using asynchronous messaging functionality.

The customer service representative can view the FNOL, claim header, and claim details.

This diagram illustrates the process flow for a claim, beginning with the FNOL and ending with the creation of the claim in the CRM system:



Claims process flow

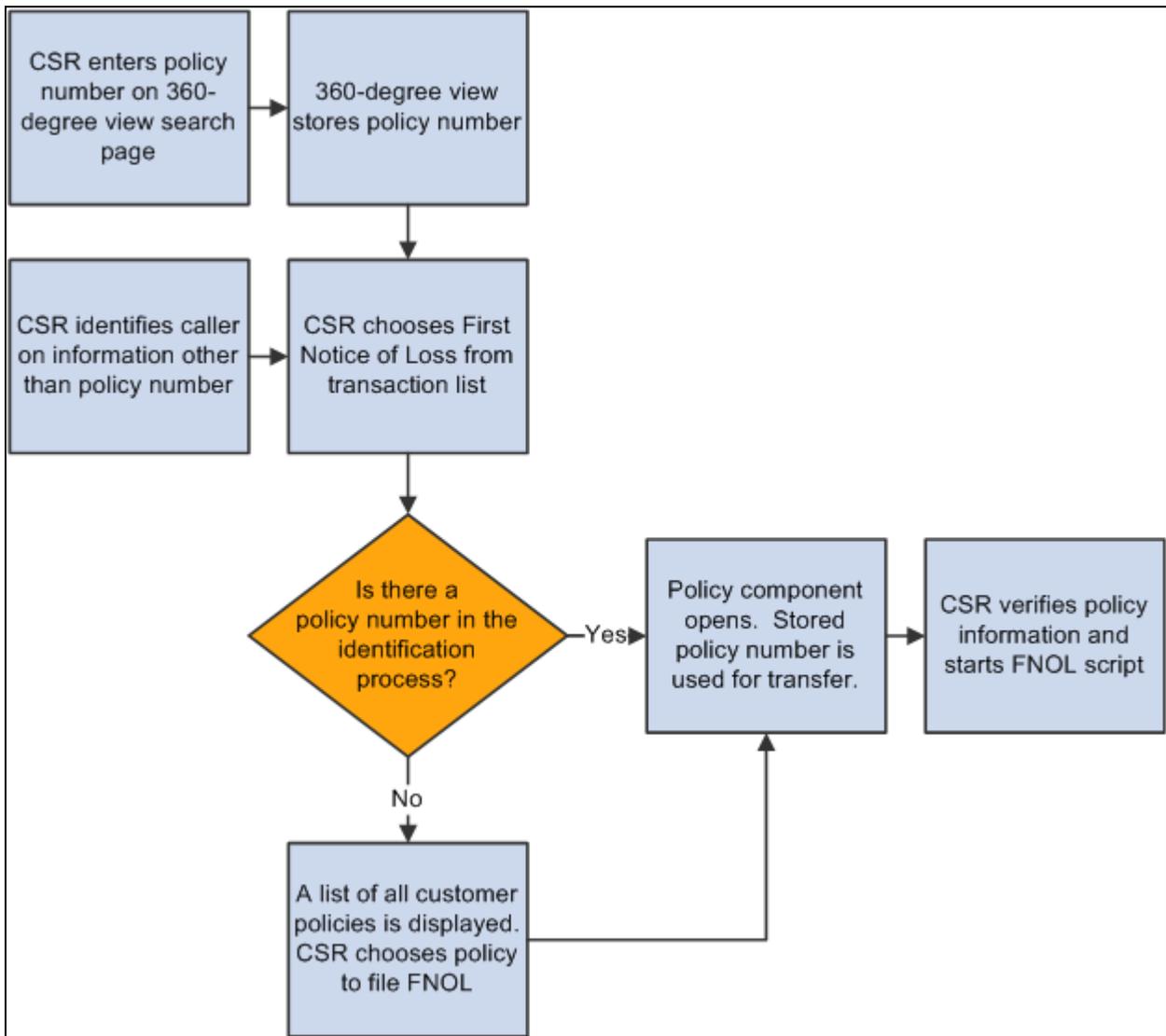
First Notice of Loss

The FNOL initiates the claims process. A policy owner can create a FNOL using a customer care transaction, or a customer service representative can do so through the 360-Degree View.

For the FNOL transaction option to be available, you must associate an action of *First Notice of Loss (code FNOL)* with the product of the policy for all of the set IDs. If you do not, you cannot launch a claim. You establish association between the policy type and the mechanism application form or branch script in the product action definition. Each action is also set ID driven; for each set ID, you must associate this action code with the product.

A FNOL results in one or more claims and the Claim Header enterprise integration point (EIP) establishes the relationship between the FNOL and claims.

This diagram illustrates the FNOL process, in which the CSR enters the customer information into the system and the customer's policy information and status is displayed and verified:



FNOL process

See Also

[Chapter 5, "Understanding Enterprise Integration Points for Policy and Claims Presentment," page 45](#)

Claims Submission

Claims processing takes place in the legacy system; Policy and Claims Presentment gathers claims data through the FNOL process and triggers a business project before data is sent to the legacy system.

This section discusses:

- FNOL business projects.

- FNOL business project modifications.

FNOL Business Projects

Once a FNOL is created, a business project is instantiated. You may have many procedural tasks to be performed before submitting FNOL for claim processing. The business project RBI_BP_FNOL is targeted for this purpose.

Policy and Claims Presentment supplies the business project as system data. The business project is triggered when the FNOL is created. Use standard Active Analytics Framework to instantiate business projects. The delivered business project contains at least one manual task that must be completed before publishing the FNOL message to claims administration. You can add or modify steps and phases to meet your business needs. However, the delivered step that publishes the message must be the business project's last step.

Note. The FNOL business project is delivered disabled and must be enabled to initiate the FNOL process and publish the message.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Setting Up Business Projects"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Business Projects"

Business Project Modifications

You can add logic to the Active Analytics Framework (AAF) as needed for the implementation:

- Define the business project.
- Define the AAF to identify the condition on which the business project will be instantiated.

Policy and Claims Presentment delivers a simplified AAF rule to initiate the business project upon save.

- Use a PeopleSoft Application Engine program to publish the message.

This program publishes the message with data from the branch script or application form and the policy number to the third-party system.

Claims Management

Once the FNOL data has been submitted to the legacy system and a claim has been processed, the customer service representative can access the claim header and claim details. All claims processing and administration takes place in the legacy system. The claim header is stored in PeopleSoft Enterprise CRM; claim details are either retrieved from the legacy system through the use of synchronous messaging or stored in PeopleSoft Enterprise CRM system using an asynchronous message.

Chapter 3

Working with Policies

This chapter discusses how to:

- Work with policies.
- Change policies.

Working with Policies

This section discusses how to:

- Establish insurance asset types.
- View insurance financial accounts.
- View relationships.
- View terms and conditions.
- View address history.
- View policies.
- View asset details.
- View billing history.
- View payment history.

To establish insurance asset types, use the RBI_ASSET_TYPE component.

Pages Used to Work with Policies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Asset Type	RBI_ASSET_TYPE	Set Up CRM, Product Related, Financial Services, Asset Type	Establish categories of assets for insurance policies.

Page Name	Definition Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT	Customer Accounts, Review Financial Accounts, Financial Account	View detailed information about the customer's financial account for insurance.
Financial Account - Relationships	RBF_ACCT_RELATIONS	Customer Accounts, Review Financial Accounts, Financial Account, Relationships	View relationships for the financial account. The account relationship message may be used to create relationships with the policy or policy owner. For example, you can establish a beneficiary relationship to the policy or you can relate the insured to the policy owner.
Terms and Conditions	RBF_ACCT_ATTR	Customer Accounts, Review Financial Accounts, Financial Account, Terms and Conditions	View the terms and conditions that are associated with the policy.
First Notices of Loss	RBI_FNOL	Customer Accounts, Review Financial Accounts, Financial Account, First Notices of Loss	View information about any FNOL on policy.
History	RBF_ACTADR_HIST	Customer Accounts, Review Financial Accounts, Financial Account, History	View the customer's address and audit history.
View Policy	RBI_POLICY	Customer Accounts, Review Financial Accounts, Financial Account Click the View Policy button on the navigation toolbar.	View details on covered assets, coverage, deductibles, limits, and options for the policy.
Asset Details	RBI_ASSET_DETAILS	Click the Details link on the View Policy page.	View specific details of a covered asset such a property name and value.
Billing History	RBI_BILL_HIST	Select the Billing History tab in the View Policy component.	View the policy's billing history. You can define the date range for the data that the legacy system returns.
Payment History	RBI_PAY_HIST	Select the Payment History tab in the View Policy component.	View the policy payment history. Policy payment history data can be viewed by a date range for the data that the legacy system returns.

Establishing Insurance Asset Types

Access the Asset Type page (Set Up CRM, Product Related, Financial Services, Asset Type).

Asset Type

Asset Type Information

Type PERS

***Description**

Asset Type page

Type Short description for the asset type. These types of assets are associated with insurance policies.

Description Long description for the asset category.

Viewing Insurance Financial Accounts

Access the Financial Account page (Customer Accounts, Review Financial Accounts, Financial Account).

Financial Account

[Save](#) | [360-Degree View](#) | [Search](#) | [View Policy](#) | [Correspond](#) | [Personalize](#)

Customer Stan Pepper **Financial Account** 21020
Currency USD **Customer Value** Platinum ★★★★★

[Financial Account](#) | [Relationships](#) | [Terms and Conditions](#) | [First Notices of Loss](#) | [Claims](#) | [History](#)

Account Information

System Source Code BSCS	Billing Account BL3004
Named Insured Stan Pepper	Status Open
Partner Name	Partner Contact
Description Homeowner's Insurance	
Begin Date 02/02/2002	End Date 02/02/2003
Account Type Insurance	Last Statement Date 09/25/2005
Registration Type Individual	National ID Type
Registration Name Home Owners	Tax ID 888-88-8081
New Nickname Pepper Home Owners	Currency Code USD
Revenue Basis	
YTD Revenue	Last Refresh 09/25/2005 12:00AM
Last Year's Revenue	Where Held
Address 1200 Lake Drive,Circle Pines,MN,55014,USA	

Financial Account page (1 of 3)

Insurance Account

Policy Type Homeowner's Insurance	Policy Name HOME OWNER INSURANCE
Policy Status Policy is issued and available for change	Policy Version 1
Insured Name STAN PEPPER	State CA
Premium Amount 150.00	Payment Terms Monthly
Carrier Name GBI INSURANCE COMPANY	Payor Name STAN PEPPER
Product Code	Line of Business Code Homeowners
NAIC Code	Line of Business Subcode Comprehensive General Liability
Beneficiary Name JENNIFER PEPPER	

Financial Account page (2 of 3)

Policy Information	
Current Term Amount 1800.00	Contract Term Duration A - 15 days
Billing Method Code Agency Billed	Contract Term Effective Date 02/02/2002
Producer Code	Contract Term Expiry Date
Group ID	Customer Servicing Code Agency Entered
Signed Date	Original Inception Date
Language Code	Mailing Responsibility Code Agency Responsibility
Payor Code Agent	Rate Effective Date 09/26/2001
Signed by Code Insured or Applicant	Other Insurance Company
Renewal Payor Code Agent	Renewal Billing Method Code Renew Automatically
Renewal Term Duration 15 days	Renewal Term Effective Date
Total Paid Loss Amount	Renewal Term Expiration Date
Number of Years Loss	Total Number of Losses
Branch Code	

Financial Account page (3 of 3)

Note. For insurance policies, the ATM Cards and Fees tabs are hidden. For other types of accounts, the First Notices of Loss tab is hidden.

Account Type Displays the type of account. Values are *Checking, Savings, Credit, Insurance, and Investment*.

Note. Two other tabs, ATM Cards and Fees, appear for all account types except *Insurance*.

Registration Type Displays the account registration type.

Under personal accounts, the values are *Individual, Joint with rights of survivorship, Tenants in common, Community property, Named beneficiary, Custodial account for minor, and Trust*.

Under business accounts, the values are *Corporation, Partnership, and LLC*.

Registration Name Displays the name that the insurer gave to the account while registering it.

Asset Type 1, Asset Type 2, Asset Type 3 Displays the type of assets linked with the account. The assets types are used to categorize the policy or the account.

Status Displays the policy's status.

Begin Date and End Date Display the policy's beginning and end dates.

Last Statement Date Displays the issue date of the last statement.

TIN Type (tax identification number type)	Displays the taxpayer identification type. Values are <i>Social Security Number</i> and <i>Federal Employer ID</i> . For personal policies, this field is named National ID Type, and the available values depend on the Country value.
Tax ID	The customer's tax identification number entered in the Consumer component.
Policy Type	Displays the specific insurance-policy type.
Policy Status	Displays the policy's current status. Values are <i>Issued and available for change</i> , <i>Not in force</i> , <i>Has been rated</i> , <i>Quoted and awaiting review</i> , <i>Submission has been quoted but not bound</i> , <i>Non renew</i> , and <i>Cancel</i> .
Insured Name	Displays the insured's name. The customer may not be the insured but a beneficiary or a contact of the insured.
Premium Amount	Displays the amount of the premium for the policy.
Carrier Name	Displays the policy carrier's name.
Product Code	Displays a company-unique code that indicates the policy's product classification.
LOB Code (line of business code)	Displays a code that identifies the line of business classification. This element uses the line of business code list.
Policy Name	Displays the name that the insurer gave to the policy.
Policy Version	Displays a number or other identifier with which the company identifies this version of the policy.
State	Displays the state in which the policy was issued.
Payment Terms	Displays the time frame, such as monthly, semiannual, or annual, for the premium payment.
Payor Name	Displays the name of the person or entity who is paying for the policy.
NAIC Code	Displays an industry code that uniquely identifies an organization that is chartered under state or provincial laws to act as an insurer.
LOB Subcode (line of business subcode)	Displays the line of business subcode, if applicable.
Current Term Amount	Displays the total gross amount including premiums, plus taxes, fees, discounts, surcharges, and so on for the current term. When a policy is issued for its normal full term, this value is the full term amount at inception.
Contract Term Duration	Displays the contract's duration in units.

Contract Term Effective Date	Displays the period for the contract, policy, binder, and so on.
Contract Term Expiry Date	Displays the period for the contract, policy, binder, and so on.
Billing Method Code	Displays a code that identifies whether the policy is to be billed directly (by company) or through an agency.
Group ID	Displays the identifier for the group or association for a policy that is written as part of group or association business.
Customer Servicing Code	Displays a code that identifies who services customer calls for the associated policy.
Signed Date	Displays the date when the application form was signed.
Original Inception Date	Displays the date when this insurer first issued a policy to the insured.
Language Code	Displays a code that indicates the language in which the policy is written.
Mailing Responsibility Code	Displays a code that identifies the organization that is responsible for mailing the policy and any related materials to the insured.
Payor Code	Displays a code that identifies the entity who is paying for the policy.
Rate Effective Date	Displays the rate's effective date.
Signed by Code	Displays a code that identifies or certifies that the signature-required application or endorsement has been signed and that the agent has the signed document.
Other Insurance Company Code	Displays a code that indicates if the insured is known to have other insurance policies with the insurer on this policy, and if additional information is available.
Renewal Payor Code	Displays a code that identifies the person or entity who is paying for the policy renewal.
Renewal Billing Method Code	Displays a code that indicates whether the renewed policy is to be billed directly (by company) or through an agency.
Renewal Term Duration	Displays the renewal policy's term.
Renewal Term Expiration Date	Displays the date that coverage under the renewal policy ends.
Renewal Term Effective Date	Displays the date that coverage under the renewal policy begins.
Total Number of Losses	Displays the total number of losses that occurred for the past number of years as you specify in the Number of Years Loss Info field. This field applies to P&C.

Total Paid Loss Amount Displays the total amount paid for the losses that are incurred during the period that you define in the Number of Years Loss Info field. This field applies to P&C.

Number of Years Loss Displays the number of years of loss information that the insurer requires. This field applies to P&C.

Note. System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM, Product Related, Financial Services, Insurance Translate Values. Insurance Translate Values enable administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This capability applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE.INS.

See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, "Setting Up Industry-Specific Functionality."

Viewing Relationships

Access the Financial Account - Relationships page (Customer Accounts, Review Financial Accounts, Financial Account, Relationships).

Financial Account - Relationships page

The Relationships page displays the relationship between financial accounts and other business objects.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer."

Viewing Terms and Conditions

Access the Financial Account - Terms and Conditions page (Customer Accounts, Review Financial Accounts, Financial Account, Terms and Conditions).

Financial Account

Save | 360 360-Degree View | Search | View Policy | Correspond | Personalize

Customer Stan Pepper Financial Account 21020
 Currency USD Customer Value Platinum ★★★★★

Financial Account | Relationships | **Terms and Conditions** | First Notices of Loss | Claims | History ▶

Insurance - General

Features Our comprehensive homeowners insurance offers premier homeowners protection and includes losses due to fire, lightning, tornadoes, wind storms, earthquakes, hail, vandalism and theft.

Terms and Conditions ** Coverage does not include protection against floods.

Financial Account - Terms and Conditions page

The system displays the terms and conditions associated with the financial account.

Viewing First Notices of Loss

Access the First Notices of Loss page (Customer Accounts, Review Financial Accounts, Financial Account, First Notices of Loss).

Financial Account

Save | 360 360-Degree View | Search | View Policy | Correspond | Personalize

Customer Stan Pepper Financial Account 21020
 Currency USD Customer Value Platinum ★★★★★

Financial Account | Relationships | Terms and Conditions | **First Notices of Loss** | Claims | History ▶

First Notices of Loss

There are no First Notice of Loss reported for this Policy.

First Notices of Loss page

Transaction Number Click to access the First Notice of Loss information.

Viewing Address and Audit History

Access the History page (Customer Accounts, Review Financial Accounts, Financial Account, History).

The screenshot displays the 'Financial Account' page for a customer named Stan Pepper. The page features a navigation toolbar with buttons for 'Save', '360 360-Degree View', 'Search', 'View Policy', 'Correspond', and 'Personalize'. Below the toolbar, customer information is shown: 'Customer Stan Pepper', 'Currency USD', 'Financial Account 21020', and 'Customer Value Platinum' with five stars. A secondary navigation bar includes 'Financial Account', 'Relationships', 'Terms and Conditions', 'First Notices of Loss', 'Claims', and 'History'. The 'History' section is active, showing 'Address History' and 'Audit History', both with the message 'No Address History found.' and 'No audit history found.' respectively.

History page

The system displays the address and audit history that is associated with the financial account.

Viewing Policies

Access the View Policy page (Customer Accounts, Review Financial Accounts, Financial Account, click the View Policy button on the navigation toolbar).

Policy
History Select One...

360 360-Degree View | Correspondent | Personalize

Policy 100001

Policy Status Open

Policy Owner William Brown

Expiration Date 02/01/2003

View Policy Billing History Payment History

Covered Assets
Find First 1-3 of 3 Last

Asset Type VEHICLE [Asset Type Details](#)

Asset Description 1998 Acura Integra LS

▼ Coverages Find First 1-2 of 2 Last

Coverage Code COLLISION INSURANCE	Territory Code CA
Start Date 02/02/2002	End Date 02/01/2003
Current Term	Premium Basis Code Estimated
Amount	Iteration Number 4
▶ Deductibles, Limits, and Options	

Coverage Code COMPREHENSIVE INSURANCE	Territory Code CA
Start Date 02/02/2002	End Date 02/01/2003
Current Term	Premium Basis Code Estimated
Amount	Iteration Number 5
▶ Deductibles, Limits, and Options	

View Policy page

The system displays details about coverage of policy assets or insured items. The policy creation EIP populates the fields.

Asset Type	Displays the type of covered asset or insured item.
Asset Type Details	Click to view details about the covered asset.
Asset Description	Displays a description of the covered asset.
Coverage Code	Displays the coverage type. This information comes from the Product table.
Start Date and End Date	Displays the beginning and end dates for the coverage.
Current Term Amount	Displays the current coverage under the policy.
Rate	Displays the rate for this coverage. The rate for each coverage is included in the total premium.
Premium Basis Code	Displays a code that indicates the basis for determining the premium.

Territory Code Displays the territory that is applicable to the coverage. The territory may be used in determining the rate or premium.

Iteration Number Displays the iteration of the coverage information.

The system displays the details of deductibles, limits, and options for each policy asset in the Deductibles/Limits/Options group box.

Deductible Amount Displays the portion of the claim that is not insured under the policy. The insurer is responsible for the amount over the deductible up to the policy limit. The deductible applies to each covered loss that appears in the Deductible Applies to Code column.

Currency Code Displays the currency that is used for the deductible or limit amount.

Deductible Basis Code Displays the deductible's basis, such as per loss or per year.

Deductible Type Code Displays the deductible type.

Deductible Applies to Code Displays the specific claim to which the deductible applies.

Limit Amount Displays the limit of the coverage.

Limit Basis Code Displays the limit's basis, such as the total limit of liability.

Limit Applies to Code Displays to what the limit applies, whether it is the specific coverage or the entire policy.

Valuation Code Values are *Appraisal*, *Comparable Sales*, and *Sales Receipt*.

Option Code Displays the option that is associated with the coverage.

Option Type Code Displays the option type.

Option Value Displays the value of the option.

Note.

System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM, Product Related, Financial Services, Insurance Translate Values. Insurance Translate Values enable administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This capability applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE_INS.

See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, "Setting Up Industry-Specific Functionality."

Viewing Asset Details

Access the Asset Type Details page (Click the Asset Type Details link on the View Policy page).

Property Name	Value of Property
MAKE	ACURA
MODEL	INTEGRA

Return

Asset Type Details page

Property Name The description of the type of property. Every insured asset has properties.

Value of Property Property values of the associated insured asset.

Viewing Billing History

Access the Billing History page (Select the Billing History tab in the View Policy component, specify a Start and End dates, and click the Get Billing History button).

Policy 100001
Policy Status Open

Policy Owner William Brown
Expiration Date 02/01/2003

View Policy | Billing History | Payment History

Date Range

Start Date End Date

Get Billing History

Billing History page (1 of 2)

Policy
History Select One...

360 360-Degree View | Correspond | [Personalize](#)

Policy 100001
Policy Status Open

Policy Owner William Brown
Expiration Date 02/01/2003

View Policy
Billing History
Payment History

Date Range

Start Date

End Date

Billing History
Customize | Find | | First 1-3 of 3 Last

Bill ID	Bill Status	Billing Date	Amount	Currency Code
3001	Paid	02/20/2005	345.55	USD
3002	Disputed	04/22/2005	525.55	USD
3003	Disputed	05/20/2005	565.50	USD

Get Billing History

Billing History page (2 of 2)

Start Date and **End Date** Enter the date range for the billing history information.

Get Billing History Click to retrieve the billing history.

Bill ID Displays the bill ID from the legacy system.

Bill Status Displays the bill status from the legacy system.

Currency Code Displays the currency code associated with a specific billing ID.

Viewing Payment History

Access the Payment History page (Select the Payment History tab in the View Policy component, specify a Start and End dates, and click the Get Payment History button).

Policy History

360 360-Degree View | Correspond | Personalize

Policy 100001 **Policy Owner** William Brown
Policy Status Open **Expiration Date** 02/01/2003

[View Policy](#) [Billing History](#) [Payment History](#)

Date Range

Start Date **End Date**

[Get Payment History](#)

Payment History page (1 of 2)

Policy History

360 360-Degree View | Correspond | Personalize

Policy 100001 **Policy Owner** William Brown
Policy Status Open **Expiration Date** 02/01/2003

[View Policy](#) [Billing History](#) [Payment History](#)

Date Range

Start Date **End Date**

Payment History [Customize](#) | [Find](#) | | [First](#) [Last](#)

Payment ID	Payment Status	Payment Method	Amount	Currency	Date
4002	Paid	Credit Card	420.23	USD	07/26/2005
4003	Past Due	Check	350.75	USD	09/20/2005
4001	Sent to Collection Agency	Cash	450.90	USD	12/23/2005

[Get Payment History](#)

Payment History page (2 of 2)

Start Date and **End Date** Enter the date range for the payment history.

Get Payment History Click to generate the payment history.

Payment ID Displays the company ID that is used for the payment.

Payment Status Displays the payment status.

Payment Method Displays the payment method, such as cash, credit card, or check.

Currency Displays the currency code associated with a specific payment ID.

Changing Policies

Policy owners can modify their policies. Policy changes can be made by the customer service representative through the 360-Degree View or by the policy owner as a self-service transaction. Certain types of policy changes can result in premium changes. For those types, a new quote is given to the end user following the policy change request. If the customer agrees to the new quote, then a message is sent to the legacy system to actually change the policy. For other types of changes, once all the policy change detail is captured, the message is published to the legacy system. After the policy is changed in the legacy system, an update policy message is sent to update the policy in the CRM system.

To change policies, use the Action (RBT_ACTION) component.

This section discusses how to:

- Set up actions.
- Change policies.
- Run the policy change script.

Pages Used to Change Policies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Action	RBT_ACTION	Set Up CRM, Product Related, Order Capture, Action	Define the action or changes that can be performed on specific coverages, and select the appropriate application method for the change.
Change Policy	RBI_CHG_POLICY	(first method: Customer Accounts, Change Policy, Change Policy) (second method: locate a customer using the 360-Degree View page then select <i>Change Policy</i> from the Actions field and click Go.)	Select the policy number and the modification type for the change.

Setting Up Actions

Access the Action page (Set Up CRM, Product Related, Order Capture, Action).

Action

Application Detail

SetID INS01

Action ID 4

Action Code FNOL

***Action Name**

***Action Type** **Re-Quote**

Action Reference

Do Not Publish to Billing

Application Method

Application Method

Form Name

Action page

Action Code	Displays the action code that you entered on the search page.
Action Name	Enter the name of the action or change.
Action Type	Select an action type.
Re-Quote	Select whether the action requires a re-quote for a changed premium.
Action Reference	This field does not apply to insurance.
Do Not Publish to Billing	Select if you do not want the application published to the billing system.
Application Method	Select the application method to be associated with the change. Values are <i>Application Form</i> , <i>Configurator</i> , and <i>Branch Script</i> .
Script Name	The script associated with the change when the application method value of <i>Branch Script</i> is selected.
Form Name	The form associated with the change when the application method value of <i>Application Form</i> is selected.
Description	The configurator model associated with the change when the application method value of <i>Configurator</i> is selected.

Changing Policies

Access the Change Policy page

(first method: Customer Accounts, Change Policy, Change Policy)

(second method: locate a customer using the 360-Degree View page then select *Change Policy* from the Actions field and click Go.).

The screenshot shows the '360-Degree View' interface. At the top, there are navigation links: Refresh, New Search, Notification, and Correspond. Below this, there are tabs for '360-Degree View', 'Relationship Viewer', 'Tasks', and 'Call Reports'. The main area shows a customer profile for 'Stan Pepper Household'. The 'Actions' dropdown menu is open, and 'Change Policy' is selected. A 'Go' button is next to it. The customer details include: First Name: Stan, Last Name: Pepper, Customer: Stan Pepper Household, Phone: 555/525-1023, Email: spepper@balboa_psft.com, Address: 2020 LongIsland Dr, Atlanta, GA, 30301, USA. The status is 'Active' and the customer value is visible. There are buttons for 'Apply Changes' and 'View Contact Details'.

360-Degree View page - Change Policy action (1 of 2)

The screenshot shows the 'Change Policy' page. At the top, there is a 'History' dropdown menu set to 'Select One...'. Below this, there is a breadcrumb trail: 360 360-Degree View | Correspond. The page title is 'Change Policy'. The 'Policy Owner' is listed as 'Stan Pepper'. The 'Policy Information' section contains two dropdown menus: '*Account Number' set to '21014 (Pepper Auto Policy)' and '*Modification Type' set to 'Add Driver'. A 'Change Policy' button is located at the bottom of the form.

Change Policy page (2 of 2)

Account Number Select the policy number to be changed. The system displays only those policies that the customer owns.

Modification Type Select the change request for the policy. Modification types are the action types that are attached to the policy. For example, automobile insurance policies allow you to *Add Driver*, *Change Address*, *Change Vehicle*, or *Delete Driver*.

Change Policy Click to launch the associated branch script, PeopleSoft Enterprise Advanced Configurator link, or application form.

Running the Change Policy Script

Access the Execute Script page (click Change Policy on the Change Policy page, then click Get Quote on the View Complete Terms and Conditions and Apply for the Product page).

Product Application

View Complete Terms and Conditions and Apply for the Product

Customer William Brown

Product Name Personal Auto

Description Your auto insurance is really a package of several primary coverages, which together make up a standard auto policy.

Package Components	
Name	Description

Customize | Find | View All | First 1 of 1 Last

Insurance - General

Features Auto insurance will safeguard your investment in your automobile, pay for medical expenses in case of an accident, provide financial protection from lawsuits, cover losses caused by uninsured drivers, pay for damage due to theft, vandalism, etc.

Terms and Conditions Coverage descriptions are general information and not statements of contract because policy provisions, endorsements, limits and requirements vary by state.

View Complete Terms and Conditions and Apply for the Product page (1 of 2)

1 General 2 Driver 3 Vehicle 4 Coverages 5 Summary

General Information Navigate to ...

* Denotes a required field 0% 25% 50% 75% 100%

About You

What state do you live in?*

How did you hear about us?

Do you have a valid drivers license?* No Yes

Has your license ever been suspended?* No Yes

Vehicle Overview

Zip code where you park your vehicles overnight*

Are any vehicles parked overnight at a location other than the above zip code?* No Yes

Are all vehicles registered to you and/or your spouse/domestic partner?* No Yes

Current Insurance

Years of Continuous Insurance*

Who is your current automobile insurance company?

What type of home policy do you have?

Number of claims for losses such as fire, theft, glass, or vandalism in the last 7 years*

Execute Script page (2 of 2)

The Execute Script page displays the application form, the PeopleSoft Enterprise Advanced Configurator link, or the branch script that is associated with the policy change. This example shows one model, but any change model can be used.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Running Scripts."

Chapter 4

Working with Claims

This chapter discusses how to:

- Manage first notice of loss (FNOL) through a customer service representative.
- View claims.

See Also

Chapter 2, "Understanding Policies and Claims," Claims Submission, page 11

Managing FNOL Through a Customer Service Representative

This section discusses how to:

- Initiate the FNOL.
- Confirm policy details.
- Create the FNOL.
- Review the FNOL.

See Also

Chapter 6, "Working with Policy and Claims Presentment Self-Service," page 51

Pages Used to Manage FNOL Through a Customer Service Representative

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
360-Degree View	RB_TD_AGENT_VIEW	Enter the customer's name, contact's name, social security number or tax identification number, or policy number on the 360-Degree View search page.	Review customer information.

Page Name	Definition Name	Navigation	Usage
View Policy	RBI_POLICY	Customer Accounts, Review Financial Accounts, View Policies On the 360-Degree View page, select a <i>Policy</i> from the Policies grid.	Confirm the details of the policy, including covered assets, coverages, limits, deductibles, and options before creating the FNOL.
First Notice of Loss	RBI_FNOL_PG	On the 360-Degree View page, select <i>Add First Notice of Loss</i> from the Actions field and click Go. Select the policy. On the Policy page, click the Create FNOL button. Financial Services, First Notice of Loss	Report a new FNOL including loss details.

Initiating the FNOL

Access the 360-Degree View page (enter the customer's name, contact's name, social security number or tax identification number, or policy number on the 360-Degree View search page).

360-Degree View

Refresh | New Search | Notification | Correspond | >> Personalize

360-Degree View | Relationship Viewer | Tasks | Call Reports

*Role: Individual Consumer | Actions: Add Case | Go

Summary

First Name: William | Last Name: Brown
 Phone: 770/343-4654 | Extension:
 Email: crmq@yaho.com | Churn Actions: ☺
 Status: Active | Customer Value: Gold ★★★★★
 Address: 2316 Main St., Atlanta, GA, 30344, USA

Apply Changes | View Consumer Details

Activities

*Date Filter: 6 - Last Year | First | Previous | Next | Last | Left | Right

Overview of - William Brown

- Global Cases
- Accounts - (0)
- Orders - (0)
- Quotes - (0)
- Business Process - (0)
- Installed Product - (0)
- Group Offers
- Commitments - (0)
- Service Management - (0)
- Bills - (0)
- Agreements - (0)
- Recommendations - (0)
- Service Orders - (0)
- Leads - (0)
- Opportunities - (0)
- Support Cases - (0)
- Interactions - (7)

† Date filter does not apply to this node

Global Cases (Related)

No Global Cases (Related) to display.

Add Interaction Note

Current Actions

360-Degree View page

Actions

Select *Add First Notice of Loss* to access the Policy Details page to confirm details. Click the Create FNOL button on the toolbar to access the FNOL script.

First Notice of Loss

Click the First Notice of Loss link in the Activities tree to access an existing FNOL.

See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, "Understanding the 360-Degree View for Industries."

Confirming Policy Details

Access the View Insurance Policy page (Customer Accounts, Review Financial Accounts, View Policies).

Insurance Policy

[View Billing History](#)
[View Payment History](#)
[Change Policy](#)
[Create First Notice of Loss](#)

Policy Number POL5001 **Policy Type** Auto Insurance

Covered Assets Find First 1 of 1 Last

Asset Type [Asset Type Details](#)
Asset Description BMW Car Fully Loaded

Coverages Find First 1 of 1 Last

Coverage Code MEDICAL COVERAGE **Territory Code** CA
Start Date 03/04/2004 **End Date**
Current Term Amount 2000.00 USD **Premium Basis Code** Estimated
Rate 3.00 **Iteration Number** 1

Deductibles, Limits, and Options

Options Customize Find 1 of 1 Last			
Option Code	Type Code	Value	Currency
I	A	2350.00	USD

[Return to Account](#)

View Insurance Policy page

A customer service representative can view the covered assets on the policy and the details about assets, coverages, deductibles, limits, and options.

Creating the FNOL

Access the Create First Notice of Loss page (select *Add First Notice of Loss* from the Actions field on the 360-Degree View page and click Go.).

Create First Notice of Loss

1 2 Next

Personal Details

Policy Information

Policy Number POL5001

Policy Name WILLIAM BROWN AUTO

Policy Status ISSUED

Beneficiary Name Mary Brown

Insured Name William Brown

Registration Name Auto Policy acct

Owner Name William Brown

State CA

Create First Notice of Loss page (1 of 2)

Create First Notice of Loss

1 2 Previous

Additional Information

Driver and Loss Information

Driver's License A0000000

Expire Date 05/05/2001

Accident Date 01/12/2001

Details Single vehicle accident.

Create First Notice of Loss page (2 of 2)

Note. These examples show a completed FNOL. You must set up an application form or branch script to create a FNOL. The name of this Application form page is RBI_FNOL_APFOR_PG1.

The system displays customer and policy information under Personal Details on the Create First Notice of Loss page.

Policy Number Enter the policy number, which comes from the Financial Account component.

Policy Name	Enter the policy name, which comes from the Financial Account component.
Policy Status	Enter the policy status, which comes from the Financial Account component.
Beneficiary Name	Enter the beneficiary who is designated for the policy, if applicable.
Insured Name	Enter the name of the insured, who may or may not be the policy owner.
Registration Name	Enter the name that the insurer gave to the account while registering it.
Owner Name	Enter the policy owner's name.
State	Enter the state of issue for the policy.
Policy Number	Enter the policy number, which comes from the Financial Account component.
Save for Later	This field should not be used when you create a FNOL.
Driver's License	Enter the insured driver's license number.
DL Expiry Date (driver's license expiry date)	Enter the driver's license expiration date.
Accident Date	Enter the date of the accident.
Details	Enter details of the loss.

Note. The fields under Additional Information on the Create First Notice of Loss page are delivered as sample data. You can modify the page to meet your business needs.

At the end of the FNOL process, a FNOL number is given to the customer. It appears on the First Notice of Loss page. The FNOL number is mapped to one or more claim numbers.

Reviewing the FNOL

Access the First Notice of Loss page (Financial Services, First Notice of Loss).

First Notice of Loss

Refresh | Correspond | 360 360-Degree View |
Personalize

FNOL Number NEXT
Status Open

Customer

Transaction Information

Transaction Type First Notice of Loss

Policy Number

Transaction Status Open

[Review Information](#)

Claims

No Claims Found

Audit History

Created	By
Modified	By

First Notice of Loss page

Transaction Type	Indicates the type of transaction, such as <i>First Notice of Loss</i> .
Policy Number	Policy number associated with the FNOL
Transaction Status	Indicates the status of the FNOL
Review Information	Link to application form or branch script completed to create this FNOL.
Related Actions	Business Project and actions associated with the claim. At the successful completion of all the tasks of this business project, a message is sent to the legacy system to create the claims.
Claims	Claims created as a result of this FNOL being created.

Reviewing Claims

This section discusses how to:

- Review claims.
- View claim details.
- Add notes to claims.

Pages Used to Review Claims

Page Name	Definition Name	Navigation	Usage
Review Claim	RBI_CLAIM_HEADER	Financial Services, Review Claim Click the Claim link on the 360-Degree View page.	View basic claim information, including claims resulting from reported FNOLs. Claim headers are created in PeopleSoft CRM using an inbound asynchronous EIP message from the legacy system. The claim header is saved in the PeopleSoft Enterprise CRM system.
Review Claim Details	RBI_CLAIM_HEADER	Click View Claim Details link on the Claim page.	View current details about the claim. Retrieve claim details from the legacy system through asynchronous messaging using the claim details EIP or using a synchronous message. The system can be configured to use the preferred mechanism.
Claim Notes	RBI_CLAIM_NOTES	Click Claim Notes tab on the Claim page.	Add notes or attachments to the claim.

Reviewing Claims

Access the Review Claim page (Financial Services, Review Claim).

Claim Details
Claim Notes

Claim Header

Claim Number GC-647-89	Claim Date 09/09/2002
Status Open	Description Claim filed for auto accident
Account Number 100001	Auto Insurance Policy
Customer William Brown	
Contact Name	

First Notice of Loss

No First Notice of Loss Found

View Claim Details

Review Claim page

Claim Number	Displays the unique identifier for the claim.
Status	<p>The system displays the current status for the claim. The claim status is updated by the EIP.</p> <p>Claim status is set up in Set Up CRM, Product Related, Financial Services, Claim Status. (To set up claim status, use the RBI_CLAIM_STATUS component.)</p> <p>Delivered values are <i>Open</i>, <i>Closed</i>, and <i>Paid</i>. These values are system data and must not be deleted.</p>
Account Number	Displays the policy number for the claim.
Customer	Displays the customer's name. This should be the policy owner.
Contact Name	Displays the name of the contact who represents the customer, if applicable. This could be a contact for a consumer, company, partnership, or alternate capacity.
Claim Date	Displays the date when the claim was filed.
Description	Displays a brief description of the claim.
First Notice of Loss	FNOL that triggered the creation of the claim.
View Claim Details	Click to view detailed information about the claim.

Viewing Claim Details

Access the Claim - Claim Details page (click View Claim Details link on the Claim page).

Claim

Save | 360 360-Degree View | Search | Previous | Next | Correspond | Personalize

Customer Stan Pepper

Claim Details | Claim Notes

Claim Header

Claim Number 314	Claim Date 09/09/2002
Status Paid	Description Claim filed for Auto Policy
Account Number 21014	Pepper Auto Act
Customer Stan Pepper	
Contact Name	

First Notice of Loss

No First Notice of Loss Found

[View Claim Details](#)

Details Find | View All First 1 of 1 Last

Customer's windshield on F150 Pickup (Account Number 21014) was severely cracked by flying debris on RTE 10. Comprehensive Coverage permits replacement windshield up to \$1500.00

Claim - Claim Details page

This page includes claim details, adjuster information, and payment information. The claim details EIP retrieves the information from the legacy system. The setup of the claim details EIP determines what information appears on the Review Claim Details page.

See [Chapter 5, "Understanding Enterprise Integration Points for Policy and Claims Presentment," page 45.](#)

Adding Notes to Claims

Access the Claim Notes page (click Claim Notes tab on the Claim page).

Claim

Save | 360 360-Degree View | Search | Previous | Next | Correspond | Personalize

Customer Stan Pepper

Claim Details | Claim Notes

Notes Summary

No Notes and Attachments for Claims

Add a Note

Added 08/17/2009 3:14PM Stu Marx

***Subject** Windshield Replacement Bill

Description Received bill for windshield replacement of 1379.46. Check issue to customer 03/09/2006.

Start Date 03/09/2006 **End Date**

Visibility Internal

Apply Note | Add an Attachment

Claim Notes page

This page enables the agent to add notes and attachments to the claim.

Chapter 5

Understanding Enterprise Integration Points for Policy and Claims Presentment

This chapter discusses enterprise integration points (EIPs) for Policy and Claims Presentment.

EIPs for Policy and Claims Presentment

This section discusses:

- Policy creation EIP.
- Policy application EIP.
- Billing history EIP.
- Payment history EIP.
- Change policy EIP.
- First notice of loss (FNOL) EIP.
- Claim header EIP.
- Claim detail display EIP.

These EIPs are designed for the insurance industry.

Policy Creation EIP

When a customer completes the policy application, the PeopleSoft CRM system sends the completed application information to the legacy system. The legacy system then creates the policy in its own system and performs all the checks and business processes that are required. Next, the legacy system sends a message to Integration Broker to create the policy in the CRM system. Translation is not required for the incoming message, but a subscription code is required to read the message content and create the policy and associated records in the PeopleSoft CRM table structure. The code uses the policy number to determine whether this is a new or existing policy. For a new policy, the system inserts new sets of data into the CRM tables. For existing policies, the system issues an update statement on the account header part and deletes and reinserts policy detail and coverage data in the remaining tables. The message structure includes policy information, covered assets, covered asset details, coverages, deductibles, options, and limits.

This table describes the Create Policy EIP:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Create Policy	Receive policy information.	RBI_POLICY	CRM ← External System	Integration Broker

Policy Application EIP

The policy application EIP is used to send the information captured in the application process to the legacy system where the policy is created.

This table describes the Request Policy Creation EIP:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Request Policy Creation	Send accepted quote to legacy system for policy creation.	RBF_SALES_ENTRY	CRM → External System	Integration Broker

Billing History EIP

Billing data is stored and maintained in an external system. The billing history EIPs request and receive billing history information from external systems.

This table describes the Billing History EIPs:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Billing History	Synchronous request to obtain the billing history from the external system.	RBI_BILLING_HISTORY_REQ	CRM → External System	Integration Broker
Billing History	Synchronous reply to billing history request from the external system.	RBI_BILLING_HISTORY_RES	External System → CRM	Integration Broker

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Billing History	If the customer chooses to store billing data in the CRM system as well, then this asynchronous message is used. It is indicated by clearing the synchronous messaging check box in Account Options under Set Up CRM, Product Related, Financial Services, FSI Options. This message is asynchronous.	RBI_BILLING_HISTORY	External System → CRM	Integration Broker.

Payment History EIP

Payment data is stored and maintained in an external system. The payment history EIPs request and receive payment history information from external systems. Payment history is available in the Financial Account record.

This table describes the Payment History EIPs:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Payment History	Synchronous request to obtain payment history from external system.	RBI_PAYMENT_HISTORY_REQ	CRM → External System	Integration Broker
Payment History	Synchronous Reply to payment history request from external system.	RBI_PAYMENT_HISTORY_RES	External System → CRM	Integration Broker

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Payment History	If the customer chooses to store payment data in the CRM system as well, then this asynchronous message is used. It is indicated by clearing the synchronous messaging check box in Account Options under Set Up CRM, Product Related, Financial Services, FSI Options This message is asynchronous.	RBI_PAYMENT_HISTORY	External System → CRM	Integration Broker

Change Policy EIP

The change policy EIP is used to communicate the policy modification messages to the legacy system. If the Policy Modification requires a new quote, then a quote is generated and it follows the sales entry process.

This table describes the Change Policy EIPs:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Change Policy Request	Asynchronous request to change policy to external system.	RBF_SALES_ENTRY	CRM → External System	Integration Broker
Update Change Policy Status	Asynchronous reply to Policy change request from external system.	RBI_CHANGE_POLICY_STATUS	External System → CRM	Integration Broker

FNOL EIP

The FNOL EIP is used to publish the message when a FNOL is saved in the PeopleSoft CRM system and the associated business project tasks are completed. The message consists of the FNOL number, policy number, and the questions and answers from the branch script or application form. The FNOL number is stored and mapped to a claim in the PeopleSoft CRM system.

This table describes the FNOL EIP:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Publish FNOL Details	Sends the FNOL information from the PeopleSoft CRM system to the claims administration system.	RBI_ISSUE_PUBL ISH	CRM → External System	Integration Broker

Claim Header EIP

The claim header EIP is used to create the claim header in the Policy and Claims Presentment system. This one-way message creates the claims in the CRM system that was created in the legacy system as a result of a FNOL . One or more claims may be generated from a FNOL. The subscription code creates the claim records and establishes the relationship between the FNOL and the claim.

This table describes the Claim Header EIP:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Get Claim Header	Receive claim information.	RBI_CLAIM_HDR	CRM← External System	Integration Broker

Claim Detail Display EIPs

The claim detail display EIPs retrieve claims data from the claims system and display the data on the View Claim page. This synchronous message retrieves the claim header number and claim detail.

This table describes the Claim Detail EIPs:

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
Get Claim Details	Synchronous request to obtain claim details from external system.	RBI_CLAIMNO_REES	CRM ← External System	Integration Broker
Get Claim Details	Synchronous reply to claim details request from the external system. This synchronous message retrieves real-time claim information.	RBI_CLAIMNO_SYNC	External System → CRM	Integration Broker
Get Claim Details	If the customer chooses to store claim data in the CRM system as well, then this asynchronous message is used. It is indicated by clearing the synchronous messaging check box in Account Options under Set Up CRM, Product Related, Financial Services, FSI Options. This message is asynchronous.	RBI_CLAIM_DETAILS	External System → CRM	Integration Broker

Chapter 6

Working with Policy and Claims Presentment Self-Service

This chapter provides an overview of Policy and Claims Presentment self-service, lists prerequisites, and discusses how to:

- Change policies in self-service.
- Report a First Notice of Loss (FNOL) in self-service.
- View claims in self-service.

Understanding Policy and Claims Presentment Self-Service

This section discusses:

- Self-service access.
- Self-service management.

Self-Service Access

Two types of self-service users can access the site:

- Guest users.
- Registered users.

Guest User Access

When users first access the site, they are automatically logged in using the INSGUEST ID that is identified in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access.

Then, users can sign in with their own user ID and password to further identify themselves and get additional access. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics, such as the site language.

If you have more than one guest ID, users can switch to a different one by selecting a value from the drop-down list box on the page. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics.

Registered User Access

Visitors can register as personal users by clicking the Personal User Registration link on the Sign In page and establishing a personal user ID. This sign-in prompts the system to create a consumer record for that person, and the registration causes the system to create a user ID that is associated with the new consumer record. The visitor can use this ID to sign in on subsequent visits to the site. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options and, in some cases, page appearance depend on the user's role or roles.

Users who forget their passwords can click the Password Hint link to request a new password.

Self-Service Management

This table describes the self-service menu items:

<i>Menu Item</i>	<i>Description</i>
Policy Administration	Modify policies.
Find Products	View or search product catalogs, view information about product offerings, and request quotes online.
Profile	Change the username, password, default address, phone number, and email address; view and maintain an address book; and view internal contact information.
Customer Selection	Select the role for the current transaction.
Contact Us	Create an email that will be directed to the appropriate area in the organization.
Customer Care	Create an FNOL, update claims, and log complaints.

Prerequisites

Self-service functionality for Policy and Claims Presentment is based on core functionality for case and product catalogs. This table lists chapters in this PeopleBook in which you can find detailed information about setting up and managing self-service:

Process	Details	More Information
Setting up customer self-service	<ul style="list-style-type: none"> • Define guest IDs. • Set up user registration features. • Set up Contact Us features. 	See <i>PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Customer Self-Service."
Working with customer self-service	<ul style="list-style-type: none"> • Sign in to PeopleSoft self-service. • Register as a personal user. • Maintain name and sign-in information. • Maintain a customer's contact and address information. • Maintain a customer's address book. • View internal contacts. • Send messages. 	See <i>PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook</i> , "Working with Customer Self-Service Transactions."
Configuring self-service	<ul style="list-style-type: none"> • Hide specific fields in self-service case components. • Configure 'Contact me' notifications. • Associate solutions with reasons that self-service users provide for closing cases. • Update descriptions of the predefined searches that the users of self-service components use. • Set up FAQs and troubleshooting guides. 	See <i>PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook</i> , "Configuring Self-Service Applications."
Working with self-service transactions	<ul style="list-style-type: none"> • Create an FNOL. • Manage existing FNOL. • Search for solutions. • Use FAQs and troubleshooting guides. 	See <i>PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook</i> , "Working with Self-Service Application Transactions."

Changing Policies in Self-Service

The self-service user can make changes to policies online.

This section discusses how to administer policies in self-service.

Pages Used to Change Policies in Self-Service

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Policy Administration	RBI_CHG_POLICY_SS	Click the Policy Administration link on the main menu in self-service.	Access the Change Policy component.
Change Policy	RBF_PROD_APPLY_SA	Click the Change Policy button on the Policy Administration page in self-service.	Modify policies.

Administering Policies in Self-Service

Access the Policy Administration page (click the Policy Administration link on the main menu in self-service).

Policy Administration

Policy Information

*Account Number

*Modification Type

Change Policy

* Required Field

Policy Administration page

Account Number

Select a policy number that is associated with the user's role. You can modify only those policies that are authorized for the user in the security matrix.

Modification Type

Select the action that is associated with the product.

This field defines the changes a policy owner can make to a policy.

Change Policy

Click to submit the policy change request. When the user clicks this button, more information will be captured to complete the change and a confirmation number is returned. If the Policy change requires re-quoting, a new quote provided. After the quote is accepted and purchased, a change policy request is sent to the legacy system to modify the policy. The legacy system updates the policy and sends the changes back to the PeopleSoft Enterprise CRM system. The PeopleSoft Enterprise CRM system subscribes to the published changes to the policy and eventually updates the policy.

Reporting a FNOL in Self-Service

Access the policy through the My Policies pagelet to create a FNOL.

This section discusses how self-service users:

- Review financial account information.
- Review insurance policy details.
- Report FNOL.

Pages Used to Report a FNOL in Self-Service

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Financial Account	RBF_FIN_ACCOUNT_SS	Click the policy number link on the My Policies pagelet in self-service.	Review policy details.
Insurance Policy	RBI_POLICY_SS	Click the View Policy button on the Financial Account page in self-service.	Review covered assets, coverages, deductibles, limits, and options for the selected policy.

Reviewing Financial Account Information

Access the Financial Account page (click the policy number link on the My Policies pagelet in self-service).

Financial Account	
View Policy View Claim Summary	
Account Information	
System Source Code BSCS	Billing Account
Named Insured William Brown	Status Open
Partner Name Lopez and Lee LLP	Partner Contact Maria Lopez
Description Personal Auto	
Begin Date	End Date
Account Type Insurance	Last Statement Date 09/25/2005
Registration Type Individual	National ID Type
Registration Name Auto Policy acct	Tax ID 102003000
New Nickname My Auto Policy	Currency Code USD
Revenue Basis	
YTD Revenue 346.45	Last Refresh 09/25/2005 12:00AM
Last Year's Revenue 345.34	Where Held PeopleBank
Address 3445 Amador Plaza Road, Dublin, CA, USA	
Insurance Account	
Policy Type Auto Insurance	Policy Name WILLIAM BROWN AUTO
Policy Status Policy is issued and available for change	Policy Version 1
Insured Name William Brown	State CA
Premium Amount 573.34	Payment Terms Monthly
Carrier Name All State Indemnity Company	Payor Name
Product Code	Line of Business Code Automobile - Personal
NAIC Code	Line of Business Subcode Comprehensive General Liability
Beneficiary Name Mary Brown	
Policy Information	

Financial Account page

View Policy Click to access the Insurance Policy page.

View Claim Summary Click to access the Claim Summary page.

See [Chapter 3, "Working with Policies," page 13.](#)

Reviewing Insurance Policy Details

Access the Insurance Policy page (click the View Policy button on the Financial Account page in self-service).

The screenshot shows the 'Insurance Policy' page. At the top, there are four buttons: 'View Billing History', 'View Payment History', 'Change Policy', and 'Create First Notice of Loss'. Below these buttons, the policy details are displayed: 'Policy Number POL5001' and 'Policy Type Auto Insurance'. A section titled 'Covered Assets' contains a table with one row: 'Asset Type' (with a link to 'Asset Type Details') and 'Asset Description BMW Car Fully Loaded'. Below the table is a 'Coverages' section. At the bottom left, there is a link 'Return to Account'.

Insurance Policy page

- View Billing History** Click to access detailed billing history by date range.
- View Payment History** Click to access detailed payment history by date range.
- Change Policy** Click to initiate a policy modification request such as changing an address or adding an authorized driver.
- Create First Notice of Loss** Click to create a new FNOL.
- Details** Click to access asset information details.

Reporting FNOL

Access the Create First Notice of Loss page (Financial Services, First Notice of Loss).

Create First Notice of Loss

1 2 Next

Personal Details

Policy Information

Policy Number	POL5001
Policy Name	WILLIAM BROWN AUTO
Policy Status	ISSUED
Beneficiary Name	Mary Brown
Insured Name	William Brown
Registration Name	Auto Policy acct
Owner Name	William Brown
State	CA

Create First Notice of Loss page (1 of 2)

Create First Notice of Loss

1 2 Previous

Additional Information

Driver and Loss Information

Driver's License	A0000000
Expire Date	05/05/2001
Accident Date	05/05/2001
Details	

Create First Notice of Loss page (2 of 2)

- Policy Number** Enter the policy number.
- Policy Name** Enter the policy name.
- Policy Status** Enter the policy status.
- Beneficiary Name** Enter the beneficiary who is designated for the policy, if applicable.

Insured Name	Enter the name of the insured, who may or may not be the policy owner.
Registration Name	Enter the name that the insurer gave to the account while registering it.
Owner Name	Enter the policy owner's name.
State	Enter the state of issue for the policy.
Save for Later	Do not use this field when you create a FNOL.
Driver's License	Enter the insured driver's license number.
DL Expiry Date (driver's license expiration date)	Enter the driver's license expiration date.
Accident Date	Enter the date of the accident.
Details	Enter details of the loss.

Viewing Claims in Self-Service

The self-service user can view claims information using the Claims link on the self-service homepage.

This section discusses how to review claim details.

Page Used to View Claims in Self-Service

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review Claim	RBI_CLAIMHDR_SS_PG	Click the claim number link on the My Claims pagelet in self-service.	Review claim details and access the FNOL that is associated with the claim.

Reviewing Claim Details

Access the Review Claim page (click the claim number link on the My Claims pagelet in self-service).

Review Claim

Claim Header

Claim Number GC-647-89	Claim Date 09/09/2002
Status Open	Description Claim filed for auto accident
Account Number 100001	Auto Insurance Policy
Customer William Brown	
Contact Name	

First Notice of Loss

No First Notice of Loss Found

[View Claim Details](#)

Details Find | View All First **1 of 1** Last

CLAIM STATUS DATE: 04-04-2002
 REPORTED DATE: 01-23-2002
 LOSS DATE: 01-22-2002
 LOSS TIME: 11:30 AM
 WHERE OCCURRED: Northbound I-93 Burlington exit ramp.
 PREVIOUSLY REPORTED: No
 INCIDENT DESCRIPTION: Vehicle 1 driven by insured party John Smith struck Vehicle 2 driven by Matthew Jones at the north bound Interstate 93 exit ramp in Burlington, MA. Vehicle 1 sustained front-end body and engine damage, and driver 1 sustained a broken right leg. Vehicle 2 sustained rear-end body damage and suspension and drive train damage. Driver 2 was not apparently injured. State Police were notified. Both vehicles were towed to Al's Body Shop in Arlington. Driver 2 claims that personal property he left in his car was missing when he went back to the body shop to retrieve it.
 ADDITIONAL CLAIM INDICATOR: Yes
 VIOLATIONS/CITATIONS INDICATOR: Yes
 PROBABLE INCURRED AMOUNT: 32000 USD

 ADJUSTER SECTION: (Section may repeat)
 Adjuster ID 1: HC-9938

Review Claim page

- Claim Number** Displays the unique identifier for the claim.
- Account Number** Displays the policy number for the claim.
- Customer** Displays the customer's name, which should be the policy owner.
- Contact Name** Displays the name of the contact who represents the customer, if applicable. This name could be a contact for a consumer, company, partnership, or someone in an alternate capacity.
- Claim Date** Displays the date when the claim was filed.
- Description** Displays a brief description of the claim.
- First Notice of Loss** FNOL that triggered the creation of the claim.
- View Claim Details** Click to view detailed information about the claim.

60

Copyright © 2001, 2009, Oracle and/or its affiliates. All Rights Reserved.

Appendix A

Delivered Web Services and Service Operations

This appendix discusses the delivered web services and service operations for policies and claims.

Delivered Web Services

This section discusses:

- The policy web service.
- The claims web service.
- How to view the message elements.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Policy Web Service

A web service is available with the following operations:

- **Create Policy**
Takes insurance policy data as input and creates an insurance policy record and associated child records in the CRM system.
- **Get Policy**
Returns a policy record and its associated child record based on a passed unique identifier.
- **Search Policy**
Returns a list of policy records and their associated child records based on criteria field values passed via the input message.
- **Update Policy**
Modifies the attributes of the policy structure.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Policy (RBI_POLICY_CREATE)	Synchronous	RBI_POLICY_CREATE_REQ	RBI_POLICY_CREATE_RES
Get Policy (RBI_POLICY_GET)	Synchronous	RBI_POLICY_GET_REQ	RBI_POLICY_GET_RES
Search Policy (RBI_POLICY_SEARCH)	Synchronous	RBI_POLICY_SEARCH_REQ	RBI_POLICY_SEARCH_RES
Update Policy (RBI_POLICY_UPDATE)	Synchronous	RBI_POLICY_UPDATE_REQ	RBI_POLICY_UPDATE_RES

Claims Web Service

A web service is available with the following operations:

- Create Claim

Takes claim related data as input and creates a claim record and associated child records in the CRM system

- Update Claim

Takes claim information as input and updates the claim data in the CRM system.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Claim (RBI_CLAIM_CREATE)	Synchronous	RBI_CLAIM_CREATE_REQ	RBI_CLAIM_CREATE_RES
Update Claim (RBI_CLAIM_UPDATE)	Synchronous	RBI_CLAIM_UPDATE_REQ	RBI_CLAIM_UPDATE_RES

Viewing the Message Elements

You can view the elements and fields that are included in each operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.

2. Enter *RBF* or *RBI* in the Message Name field and click Search.

The system lists all the messages that are related to financial services or insurance.

3. Select the message you want to view.
4. Click the message name link under the Parts grid.

The system opens the Message Definition page in a new browser.

5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

Index

Numerics/Symbols

360-Degree View page 34

360 - Degree View page 33

A

access

self-service 52

Action page 28

actions 7

setting up 28

action type 7

Assert Details page 14

assets

property and casualty (P&C) 6

Asset Type Details page—View Policy 25

Asset Type page 15

B

Billing History page 14

Billing History page-View Policy 25

business processes 2

claims management 2

policy management 2

self-service 3

business projects

first notice of loss (FNOL) 12

modifying 12

C

Change Policy page 28, 29, 54

self-service 54

change policy script 31

Claim Details EIP 42

Claim Details page

agent facing 41

Claim Notespage

agent facing 40

claims

managing 12

process flow 9

self-service 59

self-service, viewing 59

submitting 11

viewing 59

covered assets, understanding 6

Create First Notice of Loss page

agent facing 36

customers

self-service 51

E

EIP. *See* enterprise integration point (EIP)

enterprise integration point (EIP) 45

Execute Script page 31

F

Financial Account page 14, 15

self-service 55

financial accounts

address and audit history 21

relationships 20

relationship to policy 5

self-service 55

terms and conditions 20

viewing 15

first notice of loss (FNOL)

business process flow 10

business project modifications 12

creating 36

EIP 49

initiating 34

pages, agent facing 33

reporting 55

reviewing 38

self-service 55, 56

self-service pages used for reporting 55

self-service reporting 57

understanding 10

working with 33

First Notice of Loss page

agent facing 34, 38

FNOL. *See* first notice of loss (FNOL)

FNOL (first notice of loss) 36

FNOL EIP *See Also* first notice of loss (FNOL)

G

guest user, self-service 51

H

History page - Financial Account 14, 21

I

Insurance Asset Type page 13

insurance asset types

establishing 15

Insurance Policy page

self-service 55

Insurance Translate Values 20

insured items, understanding 6

integration

- billing history EIP 46
- change policy EIP 48
- claim detail display EIP 49
- claim header EIP 49
- first notice of loss EIP 49
- payment history EIP 47
- policy application EIP 46
- policy creation EIP 45

items, insured 6

P

P&C. *See* property and casualty. (P&C)

Payment History page 14

Payment History page-View Policy 26

PeopleSoft Enterprise Policy and Claims
overview 1

policies

- asset detail 25
- automated request process 31
- billing history 25
- changing 28, 29, 54
- confirming details 35
- customer care, changing 54
- data model 5
- modification options 7
- pages used to change 28
- pages used to work with 13
- payment history 26
- self-service administration 54
- self-service pages used to change 54
- understanding 5
- viewing 22

policy administration, self-service 54

Policy Administration page

self-service 54

Policy and Claims Presentment

implementing 3

policy and claims presentment application

understanding 8

policy change pages 28

policy changes 7

policy changes, self-service 54

property and casualty (P&C) 6

R

registered user, self-service 52

relationships

financial account 20

Relationships page - Financial Account 14, 20

Review Claim Details page

agent facing 40

Review Claim page

agent facing 40

self-service 59

Review Claims

agent facing pages 40

S

scripts, changing policy 31

self-service

- accessing 51
- configuring 53
- guest user 51
- management 52
- prerequisites 52
- registered user 52
- transactions 53
- understanding 51
- users 51

T

Terms and Conditions page - Financial Account
14, 20

Translate Values

- financial account pages 20
- policy pages 20

V

View Insurance Policy page

agent facing 35

View policy page 14

View Policy page 22

agent facing 34

W

web services 61