

MANAGING AGENCY PARTNERS

Syndicate 2791

Adapting to ECF – a practical solution



Adapting to ECF – a practical solution

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- Aidan O'Neil - DOCOsoft



Adapting to ECF – a practical solution

- Introduction to MAP & ECF
- ECF workflow solution
- Use and benefits
- Conclusions



Adapting to ECF – a practical solution

Managing Agency Partners

- Capacity £400m
- Total staff 45
- Claims staff 4
- ECF lead claims >5,000 to date
- No existing workflow solution



Adapting to ECF – a practical solution

The ECF “challenge”

- Risk of an admin quagmire
- No self regulating and visible broker queue in reception
- No surplus resource to allocate and manage incoming ECF claims manually



Adapting to ECF – a practical solution

ECF workflow solution

- Key requirements
- How it works



Adapting to ECF – a practical solution

Key requirements

- Needed a simple, cost effective solution
- In place before volumes ramped up
- A simple “to do” list, not an Adjusting Workflow
- Developed by DOCOsoft

The key factor

- Driven by Claims Team – not imposed



Adapting to ECF – a practical solution

How it works

- Fed by overnight .csv messages
- Delivered via web browser
- Allocates by class & lead or follow
- Link to MAP U/W systems – signed line & prev pos
- Prioritise by synd incurred mvt & age
- Action, Query or Pend (no repository link)
- Online & Management Info



Adapting to ECF – a practical solution

“The biggest claims change in 30 years”

- Practitioner tool
- Management tool
- Compliance



Outstanding transactions

DOCOSoft WorkItem Control - Microsoft Internet Explorer provided by Managing Agency Partners

File Edit View Favorites Tools Help

Address http://mapsql01/docoworkflow/Workflow/DOCOSoftWorkItemControl.aspx?HideHeader=0&FilterColumn=B_Status&Filter=Pending&FilterType=0

Logout [ispringett] | Home | Calendar | Change Password | Pending

Inbox View

Subject	Priority	Role	Assigned On	UCR	Status	CCY	Paid Mvt (Synd)	Inc Mvt (Synd)	Total Inc (Synd)	Movement
Claim	Green	L	12/03/2009...	B0576UKX4609AUA	Outstanding	USD	126,014.00	126,014.00	126,014.00	Small
Claim Referral	Yellow	F	11/03/2009...	B08680800709006	Outstanding	USD	0.00	389,080.00	780,915.00	Large
Claim Referral	Yellow	F	10/03/2009...	B0775TL1411080001	Outstanding	USD	0.00	988,488.00	988,488.00	Large
Claim Referral	Red	F	06/03/2009...	B0823E5019731002	Outstanding	USD	1,620.00	866,550.00	866,550.00	Large
Claim Referral	Yellow	L	06/03/2009...	B0875LF2000101	Outstanding	USD	0.00	5,663.00	853,771.00	Small
Claim Referral	Green	F	05/03/2009...	B01804162	Not Reviewed	USD	194,690.00	194,690.00	865,044.00	Small

Ready Loaded 6 of 6

Options

Actioned Queried Pending Reassign Add Notes Add Diary UCR Filter

Claim Details

Insured:	<input type="text"/>	Prev Paid (100%):	<input type="text"/> 0.00
Reinsured:	UNITRIN PROPERTY & CASUALTY	Sett Amnt (100%):	<input type="text"/> 1,054,244.07
Loss Name:	JUAN V. BERNAL	O/S (100%):	<input type="text"/> 0.00
UCR:	B0576UKX4609AUA	Incurred (100%):	<input type="text"/> 1,054,244.07
UMR:	B0576UKX4609	Original Currency:	<input type="text"/> USD
Carrier Ref:	C2205MG00366	Catastrophe Code:	<input type="text"/>
Trans Ref:	B0576002	Year Of Account:	<input type="text"/> 2005
Trans Type:	S	Risk Code:	<input type="text"/> XL

Done Local intranet



Review on Repository

Xchanging

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Market Repository (Ian Springett)

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B0576UKX4609
B0576UKX4609AUAA 13-07-2005 JUAN V. BERNAL

B0576UKX4609AUAA 13-07-2005 JUAN V. BERNAL

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Transaction Status

[B0576002 AAQ](#)
[Transaction Summary](#)
[Market Summary](#)
[Market Response](#)

B0576001

Transaction Summary

UCR

B0576UKX4609AUAA
Insured

Claimant

Loss Date (From-To)

13/07/2005

Associated UCR

UMR

B0576UKX4609

Claim Status

OPEN

Reinsured

UNITRIN PROPERTY & CASUALTY

Loss Name

JUAN V. BERNAL

DoL Qualifier

L ACTUAL LOSS DATE

Associated TR

[Conflict Of Interest](#)

Broker Advised Date

09/03/2009

Broker Number

0576

Broker Reference 1

Slip Lead Advised Date

11/03/2009

Broker Contact

LEE ELLISTON

Date Added

11/03/2009

Broker Phone

01473 223701

Broker Reference 2



Action, Query or Pend

DOCOSoft WorkItem Control - Microsoft Internet Explorer provided by Managing Agency Partners

Address: http://10.182.3.22/DOCOWorkflowTest/Workflow/DOCOSoftWorkItemControl.aspx?HideHeader=0&FilterColumn=B_Status&Filter=Pending&FilterType=0

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Inbox View

Subject	Priority	Role	Assigned On	UCR	Status	CCY	Paid Mvt (Synd)	Inc Mvt (Synd)	Total Inc (Synd)	Movement \$
Claim Referral	Yellow	F	06/01/2009...	B0901BZ0800624001	Outstanding	USD	0.00	2,082,743.00	2,082,743.00	Large
Claim	Green	L	06/01/2009...	B0595CV16547S	Outstanding	USD	0.00	2,292.00	13,751.00	Small
Claim	Green	L	05/01/2009...	B0676US0000027182	Outstanding	USD	0.00	0.00	0.00	Small
Claim Referral	Red	F	31/12/2008...	B0676US0000028179	Outstanding	USD	0.00	1,000,000.00	1,000,000.00	Large
Claim	Red	L	12/11/2008...	B0868NA0700015ACA	Outstanding	USD	142,600.00	163,990.00	163,990.00	Small

Ready

Actioned | Queried | Pending

Insured: ANDREW WOLSZCZAK
 Reinsured: HEALTHCARE UNDERWRITING GROUP FLORIDA
 Loss Name: ANDREW WOLSZCZAK
 UCR: B0595CV16547S
 UMR: B0595RE000257V
 Carrier Ref: G1006EG00303
 Trans Ref: B0595006
 Trans Type: A

Catastrophe Code:
 Year Of Account: 2006
 Risk Code: GP

Microsoft Internet Explorer

The following claim will be Actioned.

UCR : B0595CV16547S
 Carrier Reference : G1006EG00303
 Insured : ANDREW WOLSZCZAK
 Reinsured : HEALTHCARE UNDERWRITING GROUP FLORIDA

*This claim does not have any Notes attached.

Do you want to continue?

OK Cancel

Done Local intranet



Add / review notes & diary

DOCOSoft WorkItem Control - Microsoft Internet Explorer provided by Managing Agency Partners

Address: http://mapsq01/docoworkflow/Workflow/DOCOSoftWorkItemControl.aspx?HideHeader=0&FilterColumn=B_Status&Filter=Pending&FilterType=1

Logout [ispringett] | Home | Calendar | Change Password | Outstanding

Inbox View

Subject	Priority	Role	Assigned On	UCR	Status	CCY	Paid Mvt (Synd)	Inc Mvt (Synd)	Total Inc (Synd)	Movement
Claim	●	L	18/04/2008...	B0676US0000022747	Pending	USD	0.00	0.00	1,125,000.00	Small
Claim	●	L	18/04/2008...	B0676US0000022873	Pending	USD	0.00	0.00	153,795.00	Small
Claim	●	L	18/04/2008...	B0676US0000022871	Pending	USD	0.00	0.00	153,795.00	Small

Ready Loaded 3 of 3

Options

Claim Notes

Current Notes:	Previous Notes:
	*** ispringett - 31/10/2008 *** sjp asked this to be broked back in july !

Claim Details

Insured: BHP BILLITON	Prev Paid (100%): 0.00
Reinsured: AXIS RE LIMITED	Sett Amnt (100%): 0.00
Loss Name: BHP BILLITON	O/S (100%): 15,000,000.00

Done Local intranet



A management tool

DOCOSoft - Summary Report - Microsoft Internet Explorer provided by Managing Agency Partners

File Edit View Favorites Tools Help

Address http://mapsq01/docoworkflow/Workflow/DOCOSoftSummaryReport.aspx

Logout [ispringett] | Home | Calendar | Change Password

DOCOSoft Workflow Activity Summary Report

Current Tasks			
User	Task	Priority \ Count	
dwood	ReviewTask (2)	2	
gmorris	ReviewTask (2)	2	
ispringett	ReviewTask (1)	1	
spattison	ReviewTask (54)	5	12
ispringett	Referred (5)	1	3

Completed Tasks			
User	Task	Count	Priority
aduggleby	ErrorInClaim	5	Low
dwood	ReviewTask	96	High
dwood	ReviewTask	263	Medium
dwood	ReviewTask	1376	Low
gmorris	ReviewTask	137	High
gmorris	ReviewTask	206	Medium
gmorris	ReviewTask	164	Low
ispringett	ReviewTask	49	High
ispringett	ReviewTask	150	Medium
ispringett	ReviewTask	625	Low
pending	ReviewTask	1	Low
spattison	ReviewTask	417	High
spattison	ReviewTask	1437	Medium
spattison	ReviewTask	1195	Low
gmorris	Referred	11	High
gmorris	Referred	11	Medium
gmorris	Referred	12	Low
ispringett	Referred	36	High
ispringett	Referred	44	Medium
ispringett	Referred	9	Low
rtrubshaw	Referred	3	High
rtrubshaw	Referred	2	Low
smallfollow	SmallFollowInfo	10699	Low

Pending Tasks	
User	Task
dwood	ReviewTask (18)
ispringett	ReviewTask (3)
spattison	ReviewTask (16)

High Medium Low

Done Local intranet

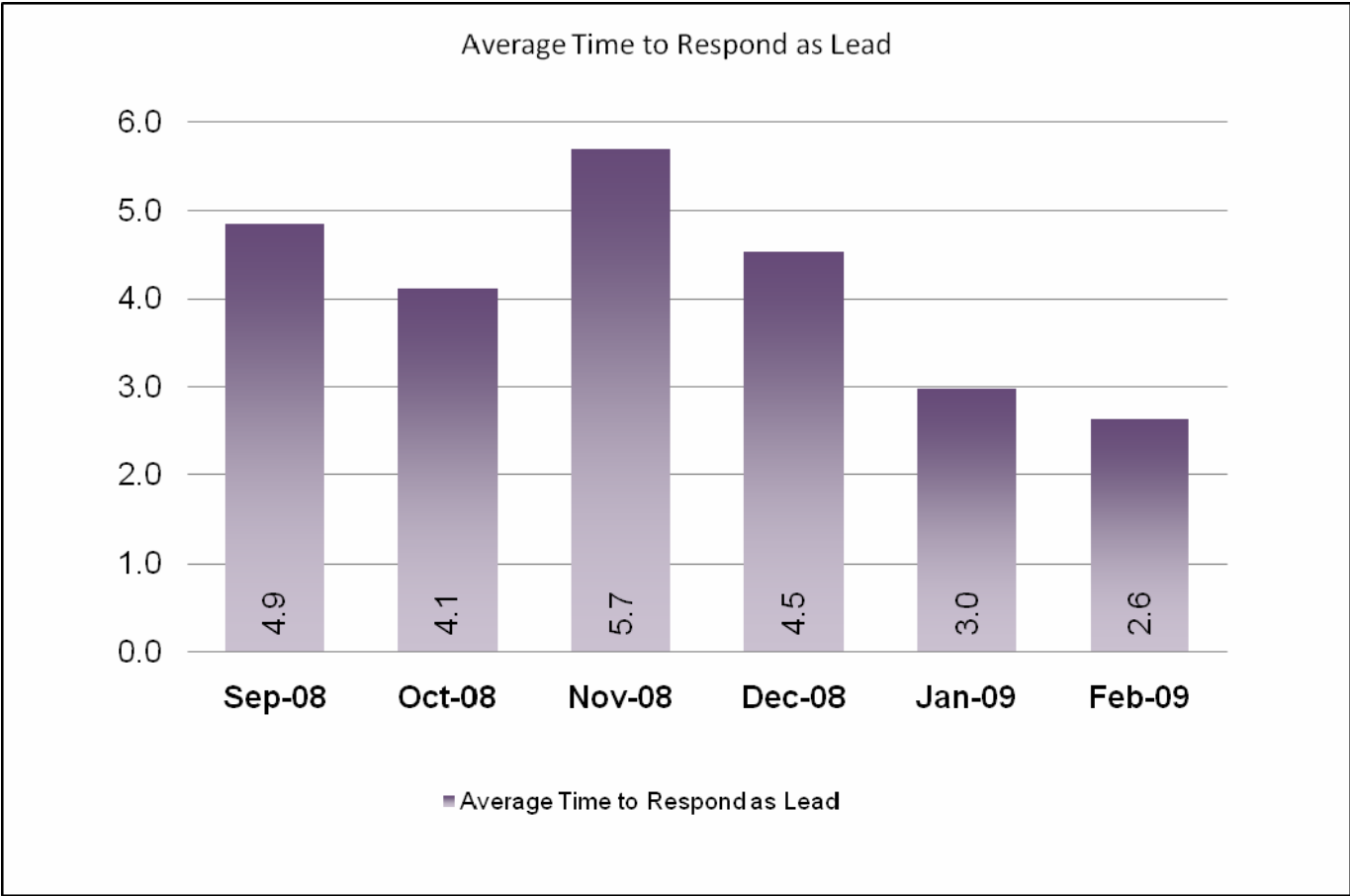


A management tool

- Real time information
- Managing expertise & resource
- Referrals & authority limits
- Reassignment & holiday cover
- Response times & service standards



Compliance, KPI's & the Franchise



Adapting to ECF – a practical solution

Conclusions

- Simple solution
- Effective with current daily triggers
- Measurable benefit
- Can't make a bad claims person good
- Can make a good claims person better!



Adapting to ECF – a practical solution

More information

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