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DXC Assure Claims

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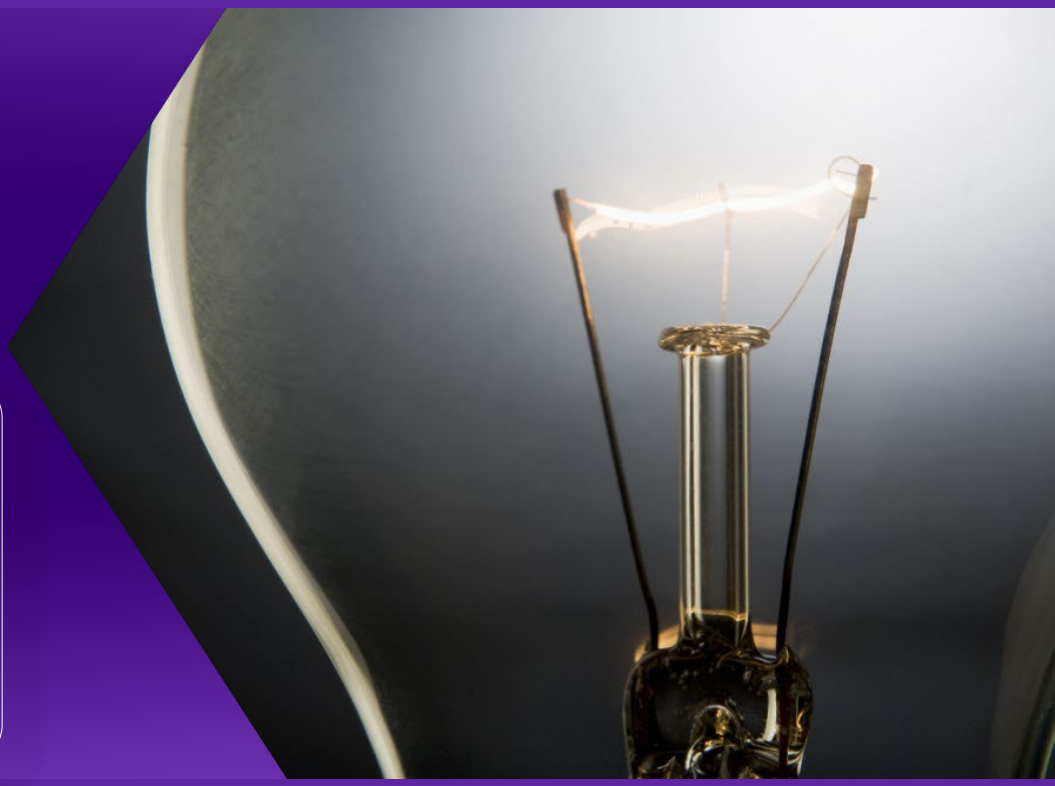

The Client Program Module

Release: **v.23.4** | December 2023

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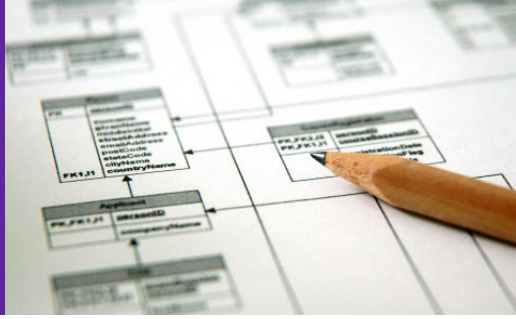

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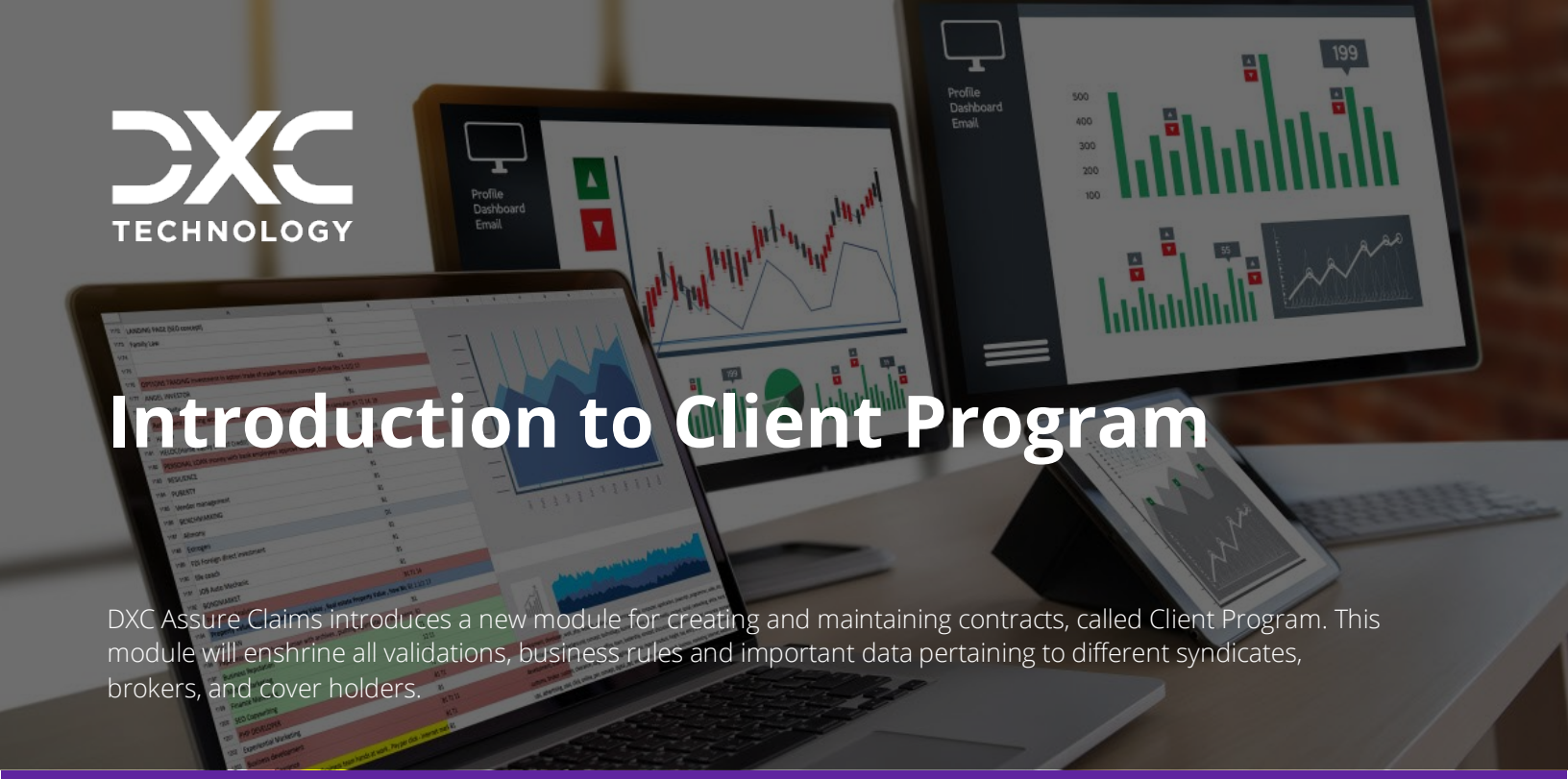

Introduction to Client Program

DXC Assure Claims introduces a new module for creating and maintaining contracts, called Client Program. This module will enshrine all validations, business rules and important data pertaining to different syndicates, brokers, and cover holders.

DXC Assure Claims | Release: v.23.4 | December 2023

Up until now, insurance companies and TPAs subscribing to DXC Assure Claims lacked the ability to track agreements/contracts with their individual clients for whom they manage claims. A system to manage all these was required as each client has a minimum of one contract with an effective and expiration dates that define many different levels and types of claims, detailed information pertaining to the client, their authority and reporting details. As such, the Assure Claims system did not support multi syndicates with different business rules, to facilitate a TPA with a single data source per contract.

DXC Assure Claims addresses this long-standing need of insurers by introducing a new module for creating and maintaining contracts, called Client Program. This module will enshrine all validations, business rules and important data pertaining to different syndicates, brokers, and cover holders.

This release version of Assure Claims has added new settings and a new screen consisting of a basic framework for the Client Program feature. The visibility of these will be subject to the SMS settings for each user.

Utilities Setting

A new checkbox labelled “Use Client Program” has been added in the Configuration Manager [Fig. 1] on the following path:

General System Parameters Setup → General System Parameters → Claims Module (tab) → Client Program (from the list of modules) → Use Client Program (checkbox).

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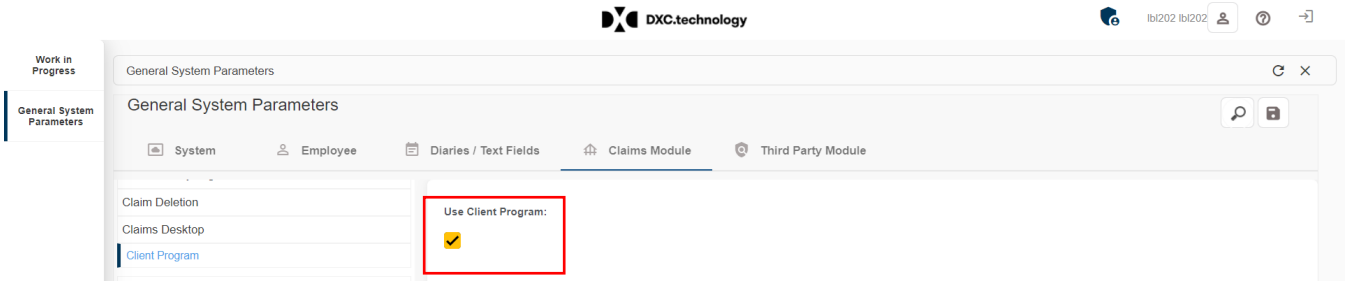
DXC Assure Claims (Configuration Manager) screen

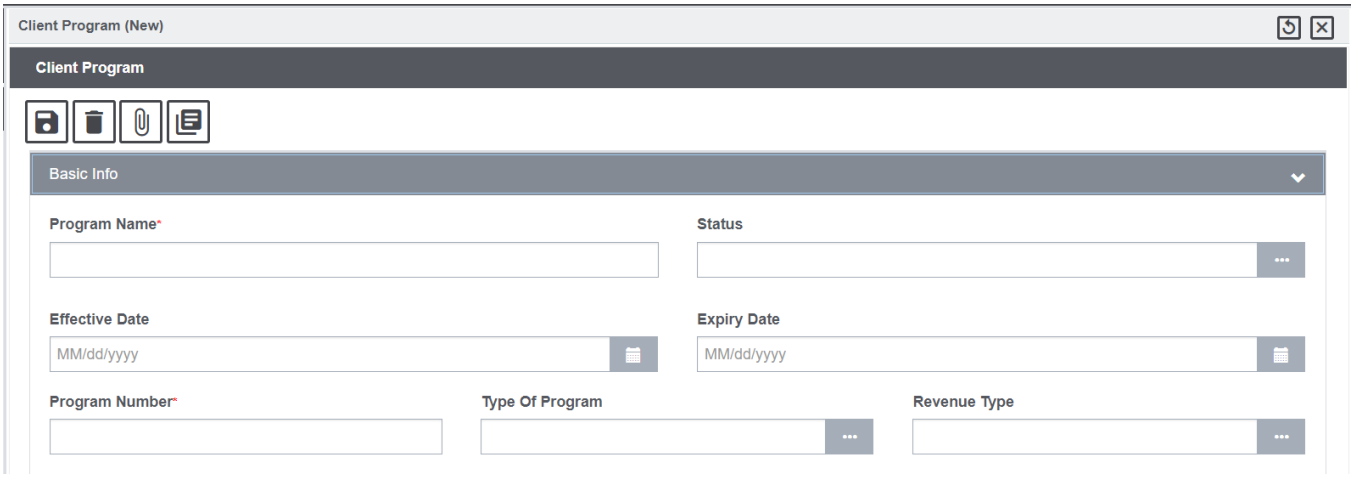


[Fig. 1]

Client Program screen – Maintenance Zone

Once this Utilities setting is enabled, the Client Program option becomes available under the Maintenance menu. [Fig.2]

DXC Assure Claims screen



[Fig. 2]

As part of phase 1 of implementation of this feature, the Client Program screen consists of two accordions – Basic Info and Supplementals.

Screen components include the following fields and buttons:

- Program Name (mandatory field)
- Status (field)
- Effective Date (date widget)
- Expiry Date (date widget)
- Program Number (mandatory field)
- Type of Program
- Revenue Type

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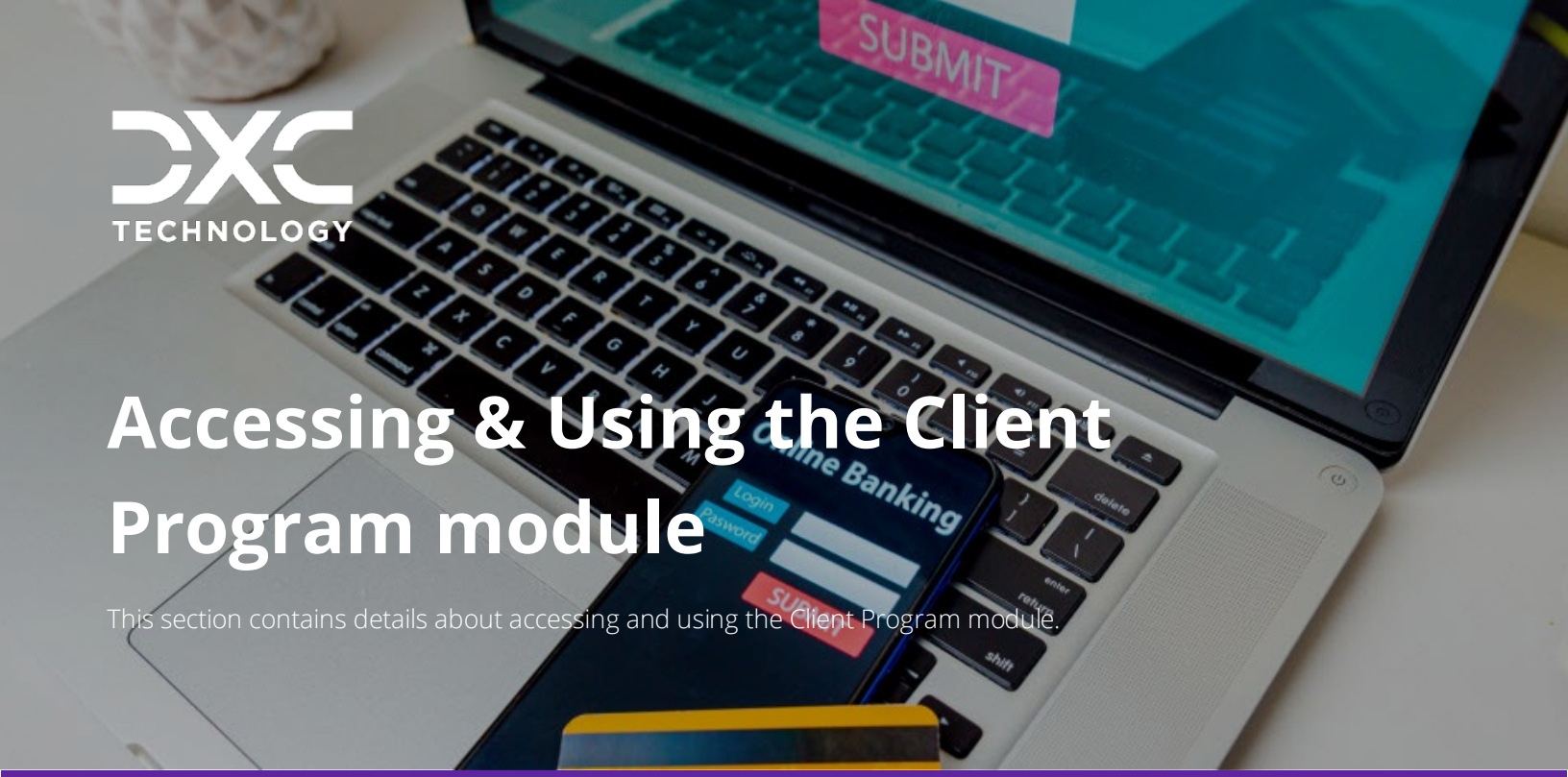
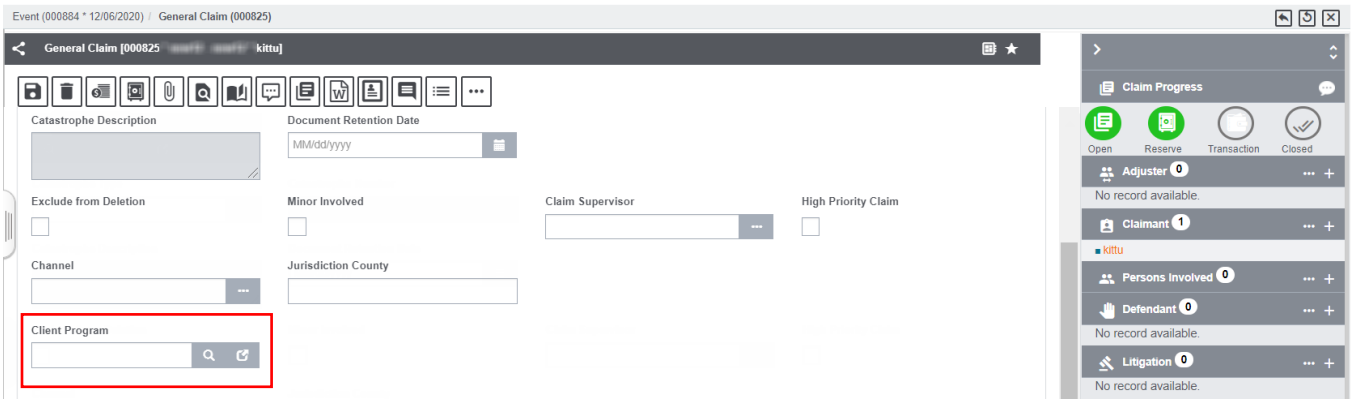


Accessing & Using the Client Program module

This section contains details about accessing and using the Client Program module.

The Client Program module is accessible via the Claims and Events screens as well. A new field labelled “Client Program” has been added on the Claim Info and the Event Info accordions. [Fig. 4]

DXC Assure Claims screen



[Fig. 4]

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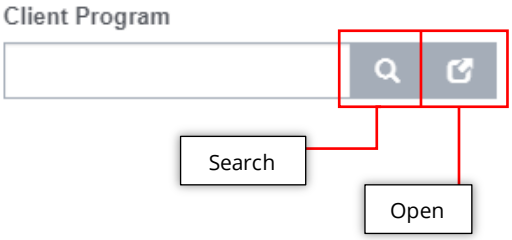
Adding a Client Program to an Event/Claim and Navigating to the Client Program screen

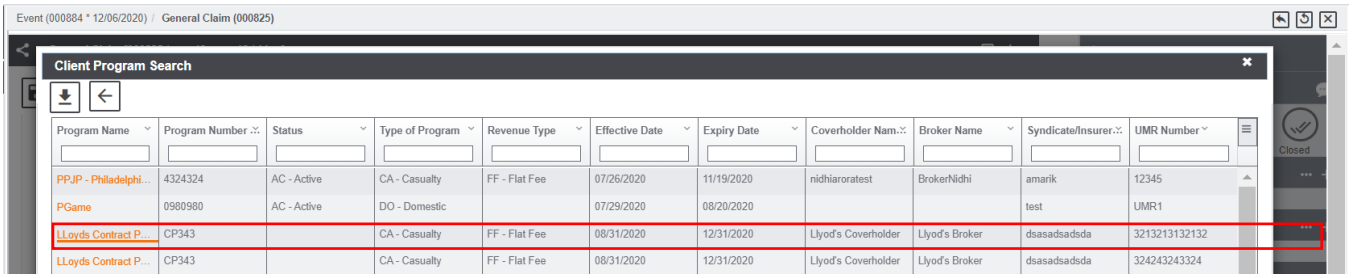


The Client Program button field has 2 buttons:

- Search
- Open

To add a new Client Program to the Claim/Event, select the Search Button to open the Entity Search window from where and appropriate option may be selected. **[Fig. 5]**

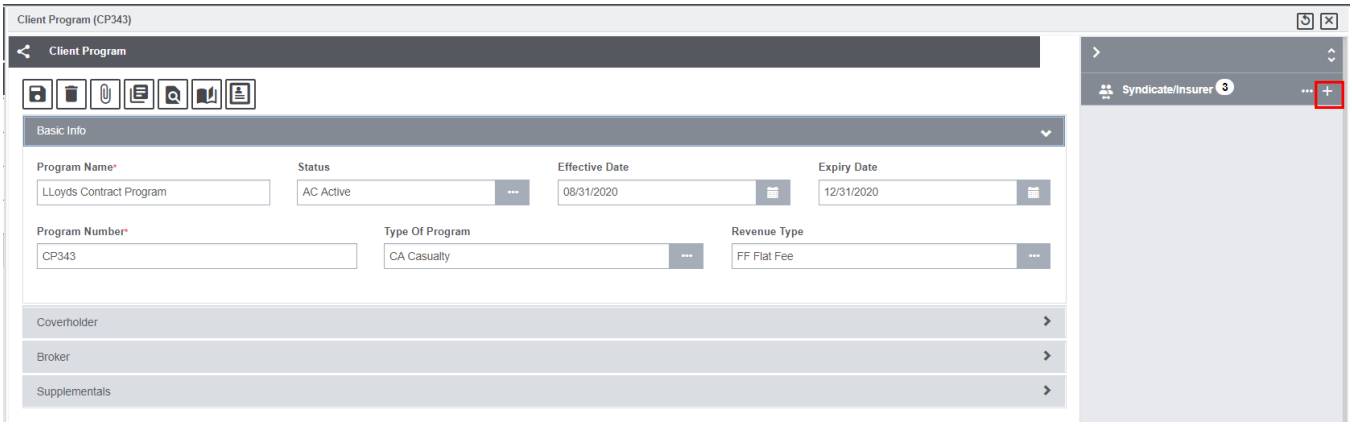
DXC Assure Claims screen



[Fig. 5]

Selecting the “Open” button will navigate to the selected Client Program screen. **[Fig. 6]**

DXC Assure Claims screen



[Fig. 6]

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Ability to associate Syndicates / Brokers / Cover Holders to Client Program

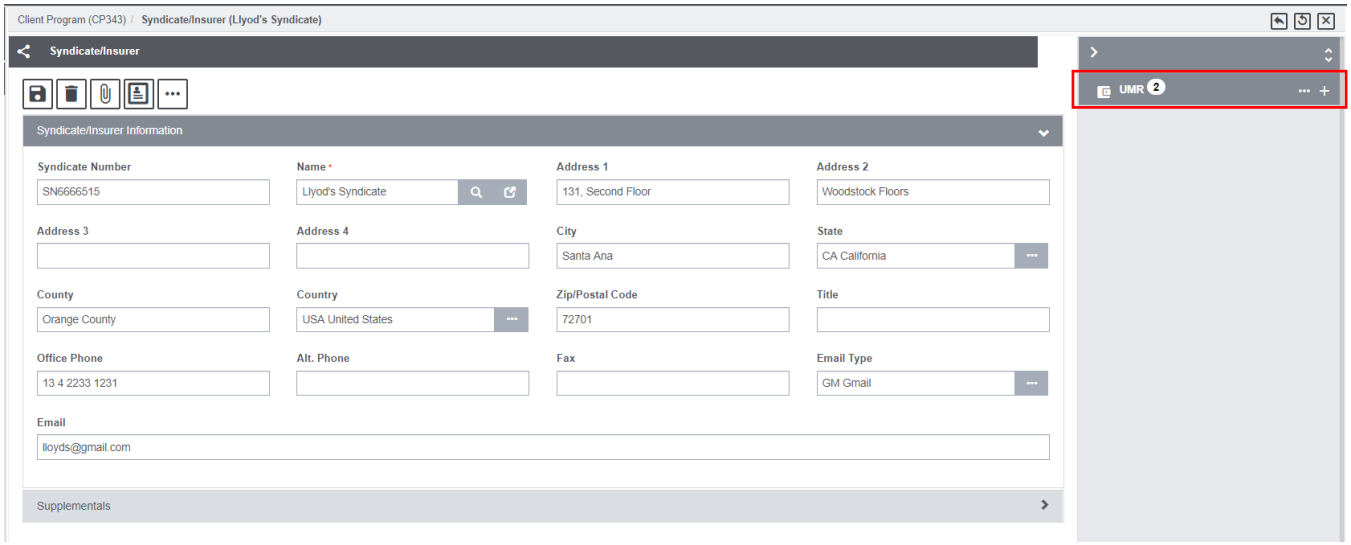
The ability to associate Syndicates/Brokers/Cover Holders has been provided via the “Add” button present on righthand pane of the Client Program screen. [Fig. 6]

Selecting the “Add” button opens the Syndicate/Insurer screen. [Fig. 7] The Syndicate/Insurer screen comprises of 2 accordions – Syndicate/Insurer Information and Supplementals.

Note

- One Client Program can have multiple Syndicates/Insurers added to it.

DXC Assure Claims screen



[Fig. 7]

All basic fields needed to capture Entity Information are available on the Syndicate/Insurer Information screen and the Syndicate Name is the only mandatory field on this screen. A Supplementals accordion is also available to capture supplemental information for the Syndicate/Insurer.

The screen has the standard toolbar buttons including:

- Save
- Delete
- Attach Document
- Record Summary
- Lookup

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Fields included in the Syndicate/Insurer screen are:

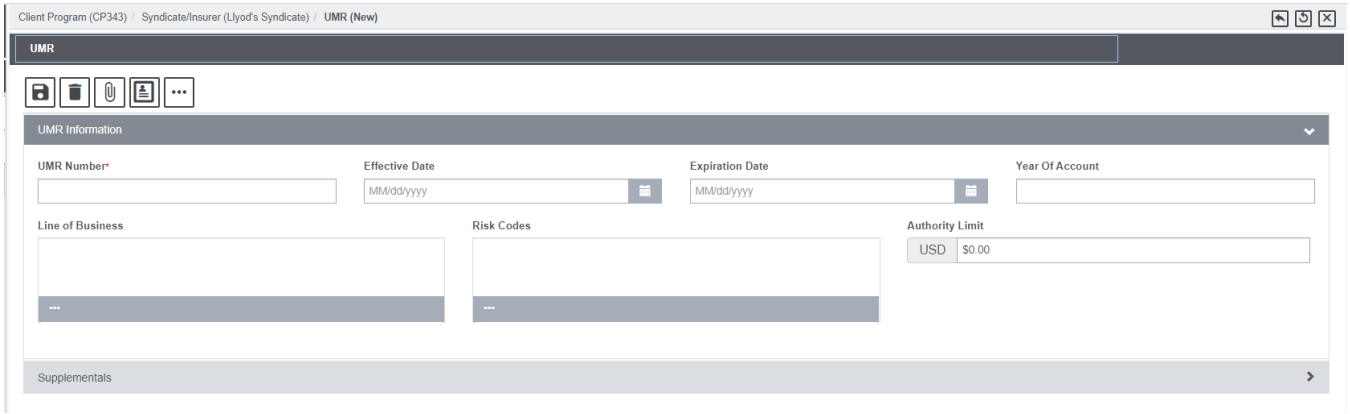
- Syndicate Number
- Name
- Address 1
- Address 2
- Address 3
- Address 4
- City
- State
- County
- Country
- Zip/Postal Code
- Title
- Office Phone
- Alt. Phone
- Fax
- Email Type
- Email

Ability to Create UMRs to Syndicates

The ability to create a UMR or Unique Market Reference Number is available on the right-hand pane of the Syndicate/Insurer screen. A UMR is a unique contract reference number for Syndicates assigned to the binding authority by the Lloyd's market. The UMR includes a reference to the London broker. The UMR should always be stated if known.

To add a new UMR, select the "Add" + button on the right-hand pane of the Syndicate/Insurer screen [Fig. 7] to open the UMR screen [Fig. 8]

DXC Assure Claims screen



[Fig. 8]

Fields available on the URM screen are:

- UMR Number
- Line of Business
- Effective Date
- Expiration Date
- Year of Account (the year in which the UMR is tied to the program)
- Risk Code (risks covered under the UMR)
- Authority Limit (threshold limit for the contract)

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Besides these, standard toolbar buttons on the screen include:

- Save
- Delete
- Attach Document
- Record Summary
- Lookup

Note

- UMR Number is a mandatory field
- There can be multiple UMRs added to a Syndicate/Insurer

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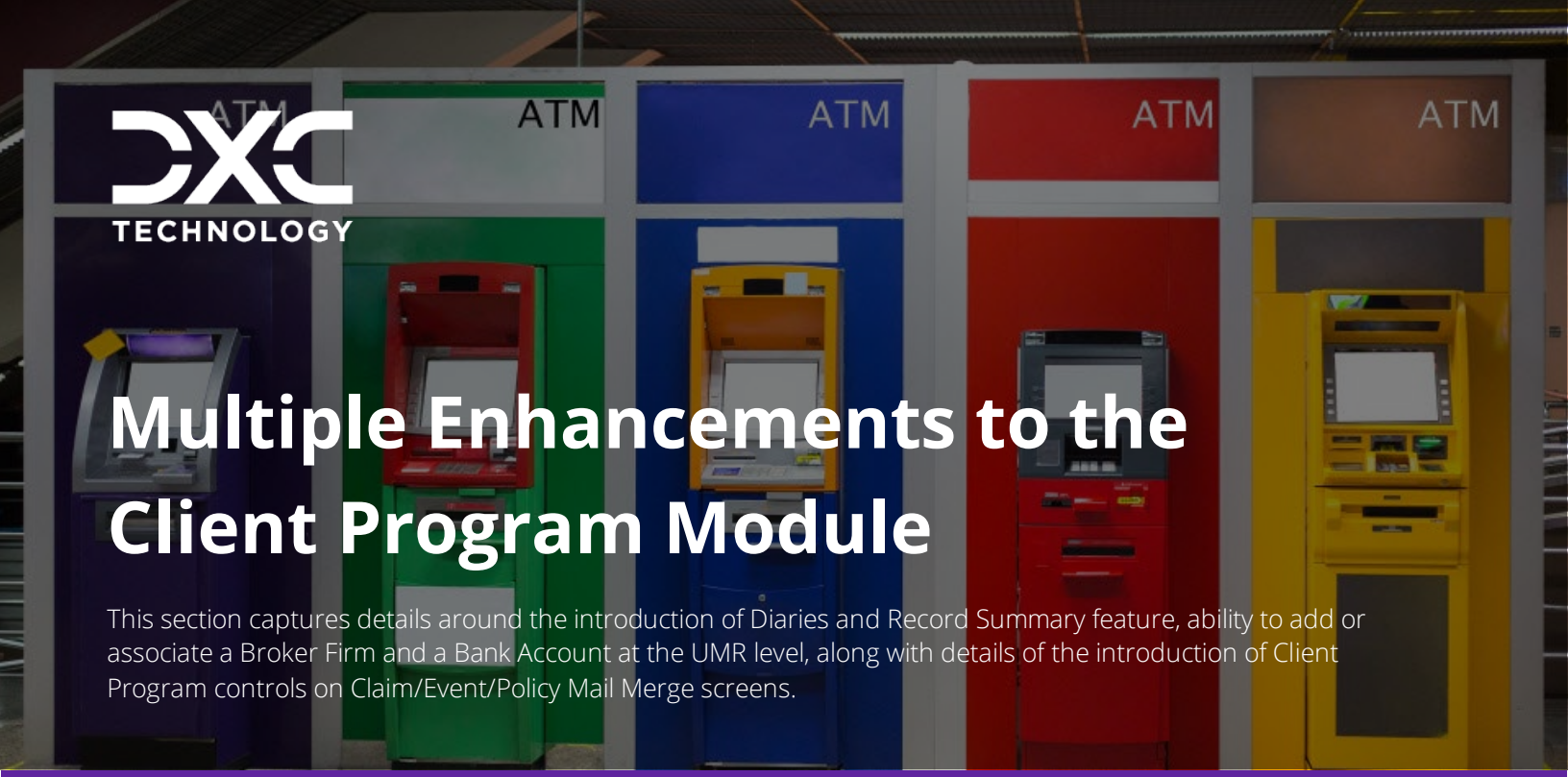

Multiple Enhancements to the Client Program Module

This section captures details around the introduction of Diaries and Record Summary feature, ability to add or associate a Broker Firm and a Bank Account at the UMR level, along with details of the introduction of Client Program controls on Claim/Event/Policy Mail Merge screens.

Introduction of Diaries and Record Summary feature in the Client Program module

The **Diary** and **Record Summary** buttons have been added on the Client Program screen. All functionalities around **Diaries** such as Create, Delete, Complete, Roll, Route etc. can be easily performed via the Diary toolbar button.

Similarly, selecting the **Record Summary** button displays Nodes/Data specific to the Client Program being worked upon. [Fig. 9]

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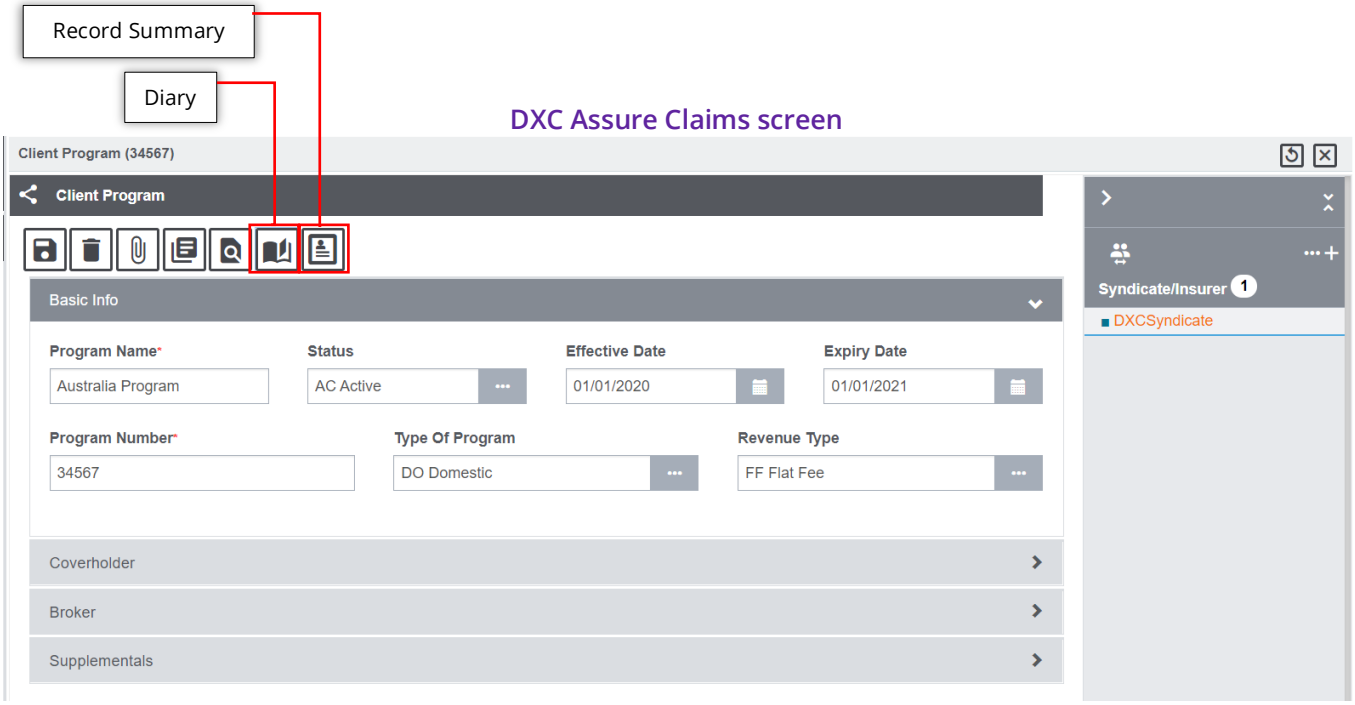

[Fig. 9]

Note

- Diaries created on a Client Program by the user will be reflected in the Diary List screen in the Claims zone for that user.
- Client Program Diaries reflect the Client Program Number they're linked to.
- The Client Program Number reflecting on the Diary Details screen is hyperlinked and selecting it will navigate to the Client Program record.
- Similarly, it is also possible to navigate to the Client Program record by selecting the Client Program number displayed on the Diary Calendar screen.

Introduction of an ability to add a Broker Firm on a UMR

The ability to add a Broker Firm on a UMR gets introduced in this release version of Assure Claims. To this end, a new lookup field – Broker has been added on the UMR screen. [Fig. 10]

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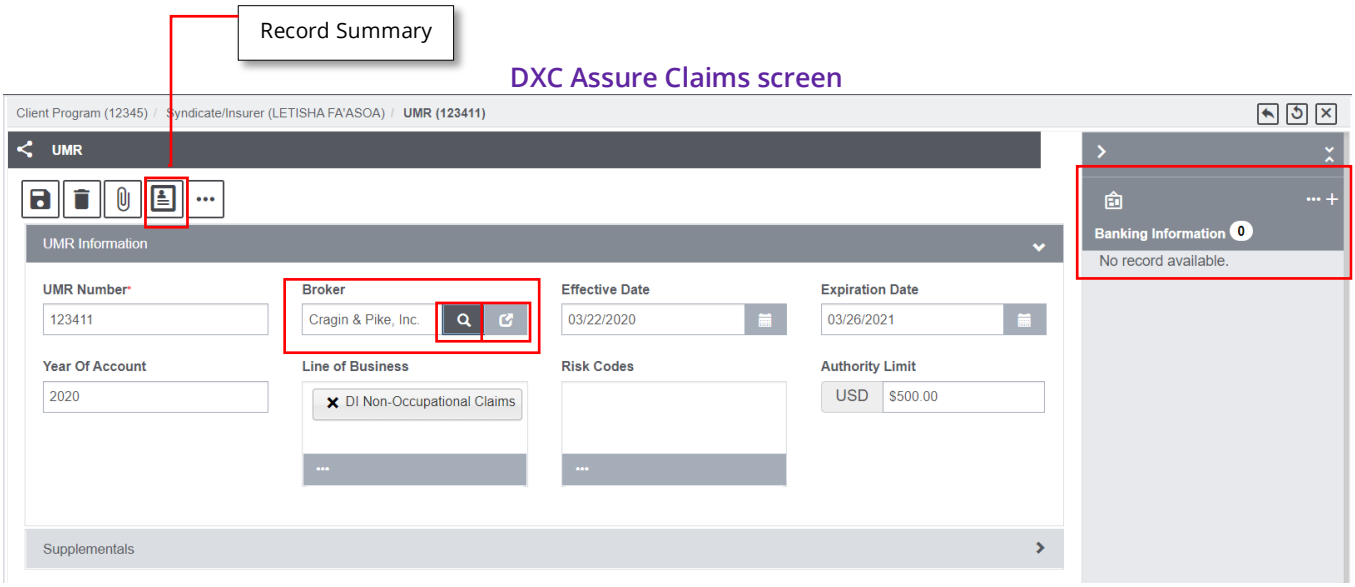
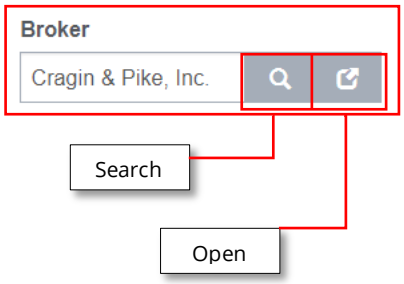


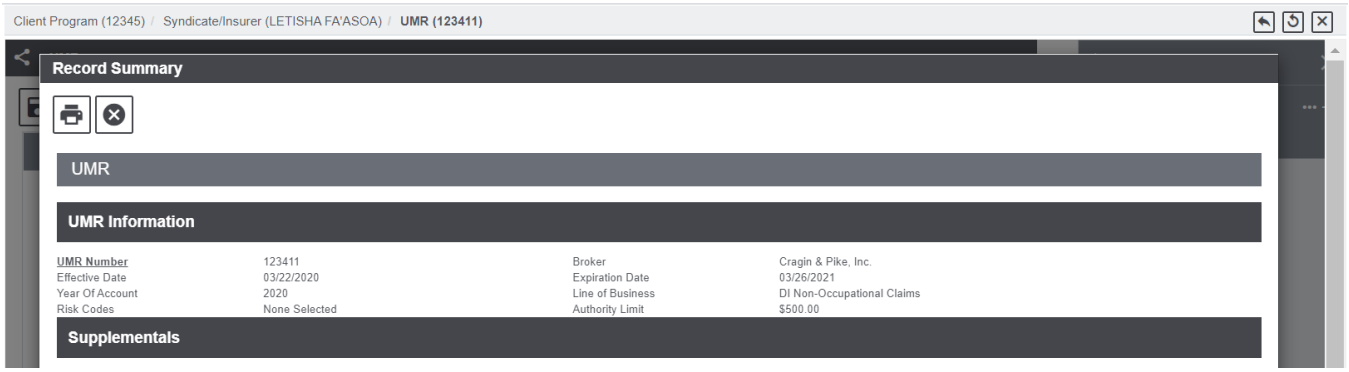
[Fig. 10]



Note

- Selecting the Open button navigates to the Broker (Entity) screen.
- Selecting the Record Summary toolbar button opens the Record Summary window displaying a comprehensive view of the UMR including the Broker Firm (Entity) data. **[Fig. 11]**

DXC Assure Claims screen



[Fig. 11]

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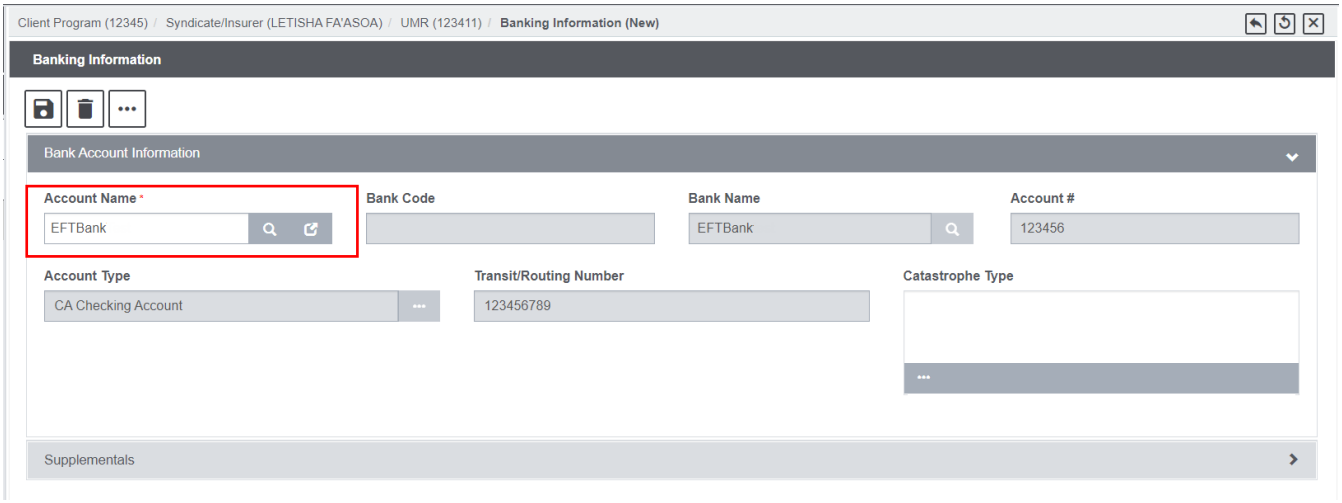
Introduction of an ability to associate a Bank Account at the UMR level

Selecting the Save button on the UMR screen [Fig. 10] makes the **Banking Information** node available on the right-hand side menu. Selecting the "Add" (+) icon opens the Banking Information screen. [Fig. 12]

DXC Assure Claims screen



[Fig. 12]

Note

- On the Bank Account Information accordion, selecting the Account Name populates data in the read only fields – Bank Code, Bank Name, Account #, Account Type and Transit/Routing Number.
- Selecting the Save button on the Banking Information screen followed by navigating back to the UMR screen shows that a Bank Account has been added.
- More Bank Accounts can be linked to the UMR by selecting the "Add" button and following steps as mentioned above.

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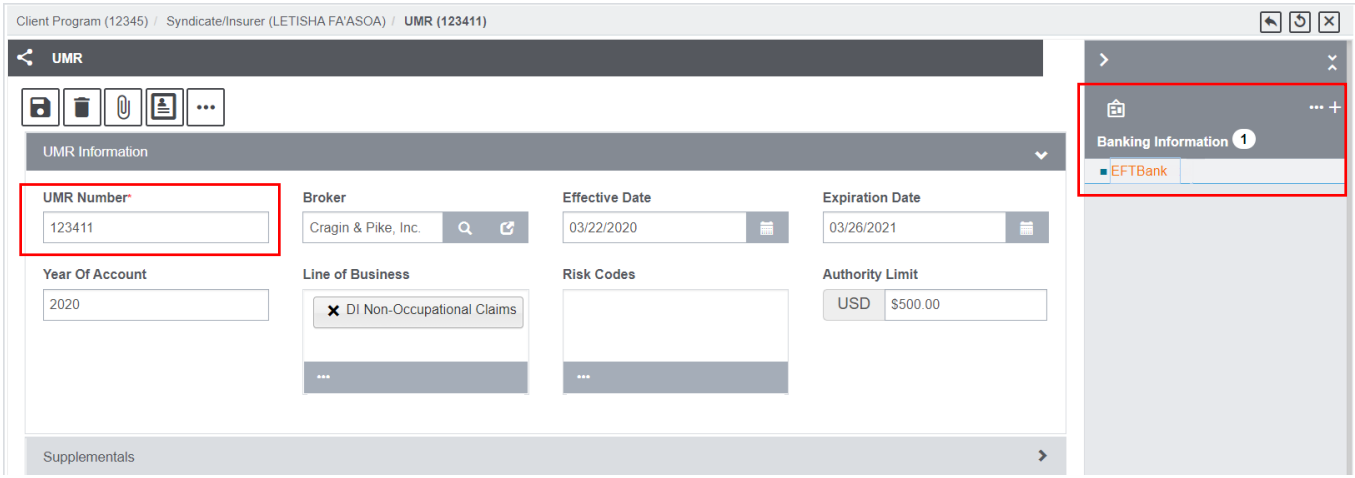
DXC Assure Claims screen

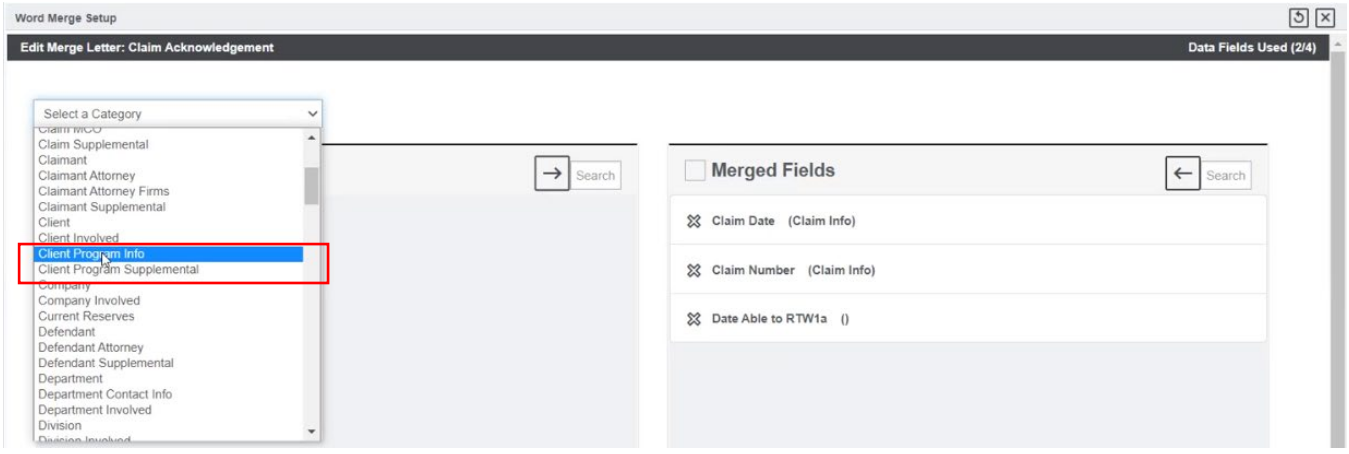


[Fig. 13]

Introduction of Client Program controls on Claim/Event/Policy Mail Merge screens

The Client Program related controls – Client Program Info and Client Program Supplementals have been added to the dropdown **Select a Category** [Fig. 14] on the Edit Merge Litter screen of the Word Merge Setup. Going forward, details such as the **Client Program Info** and **Client Program Supplementals** will be displayed on the Word Merge Letter for a Claim, Event and Policy.

DXC Assure Claims screen



[Fig. 14]

Note

- Client Program details will be displayed on Mail Merge Letters only when the Client Program module is enabled.
- There is no change in the way a Mail Merge Letter is configured and created.

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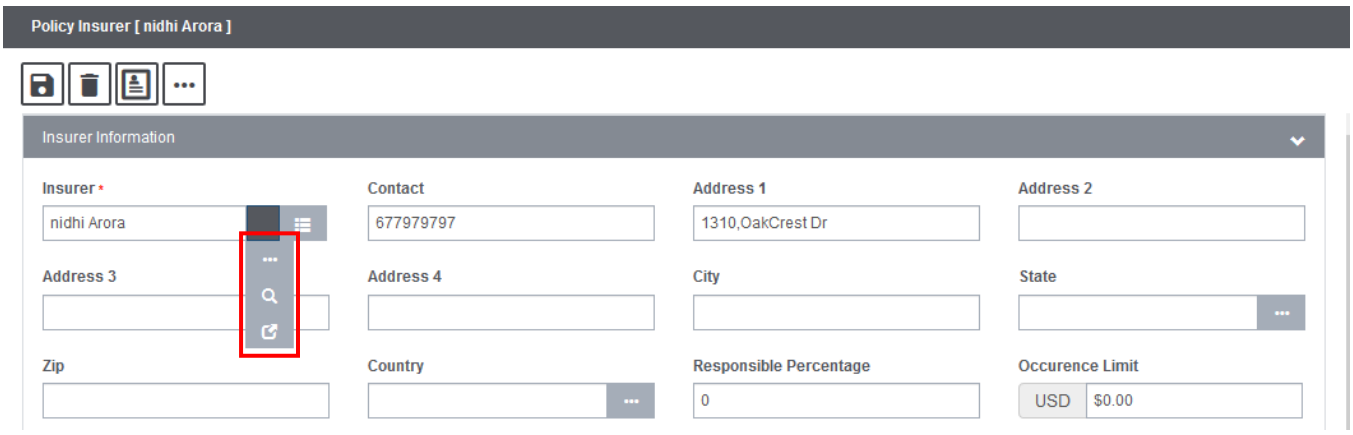
Enhancements around Policy handling and Validation Rules

This section captures details of the enhancements around Policy Handling and Validation Rules.

Ability to refer Insurer(s) associated with a Client Program in Policy

Previously, the Insurer Entity lookup table available on the Policy screen lacked the ability to list the Syndicates/Insurers associated to a Client Program. Now, three new controls namely, **Lookup**, **Entity Search** and **Open Entity**, have been added in the Insurer field of the Policy Tracking screen of the Maintenance zone. Hovering the mouse over the Insurer lookup icon displays the 3 new options. [Fig. 15]

DXC Assure Claims screen



[Fig. 15]

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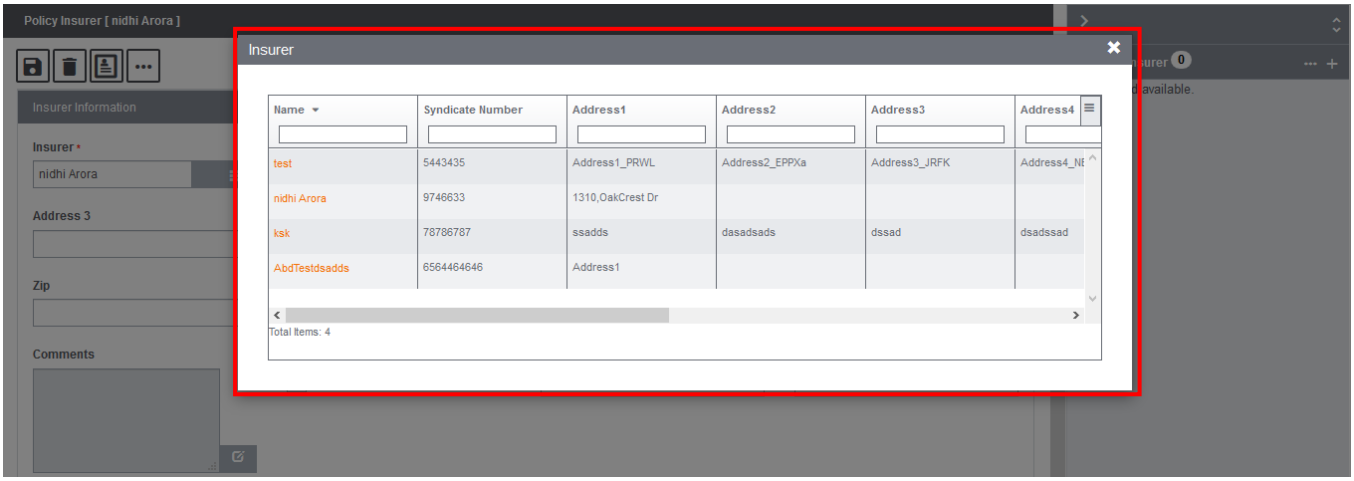
Select the **Lookup** option to pop open the Insurer lookup table that lists out the Insures of the selected Client Program. **[Fig. 16]**

DXC Assure Claims screen



[Fig. 16]

Not just this, the **Entity Search** option enables the user to view all the existing Entity Insurer irrespective of the Client Program. Additionally, the Entity can be opened/edited with the help of **Open Entity** icon. Select the same to get redirected to the corresponding Entity screen of the Insurer.

Note

- In case, Multiple Insurers for Policy option in the Utilities zone is disabled, then, the newly added controls can be used on the Insurer Information accordion of the Policy Tracking screen.
- If the option is enabled, then, all the three controls will appear in read-only mode of the Insurer Information accordion of the Policy Tracking screen.

Ability to map the Insurer with UMR on Policy

The mapping of **UMRs** (Unique Market Reference) and **Policy Percentages** is now possible based on the selected Client Program and Syndicate/Insurer. The UMR information on the Policy screen will aid in identifying the right Bank Account of the Syndicate/Insurers (associated with UMR's) while processing payments on Claims. The inclusion of the UMR also helps to decide the percentage share of each Insurer while processing the payment.

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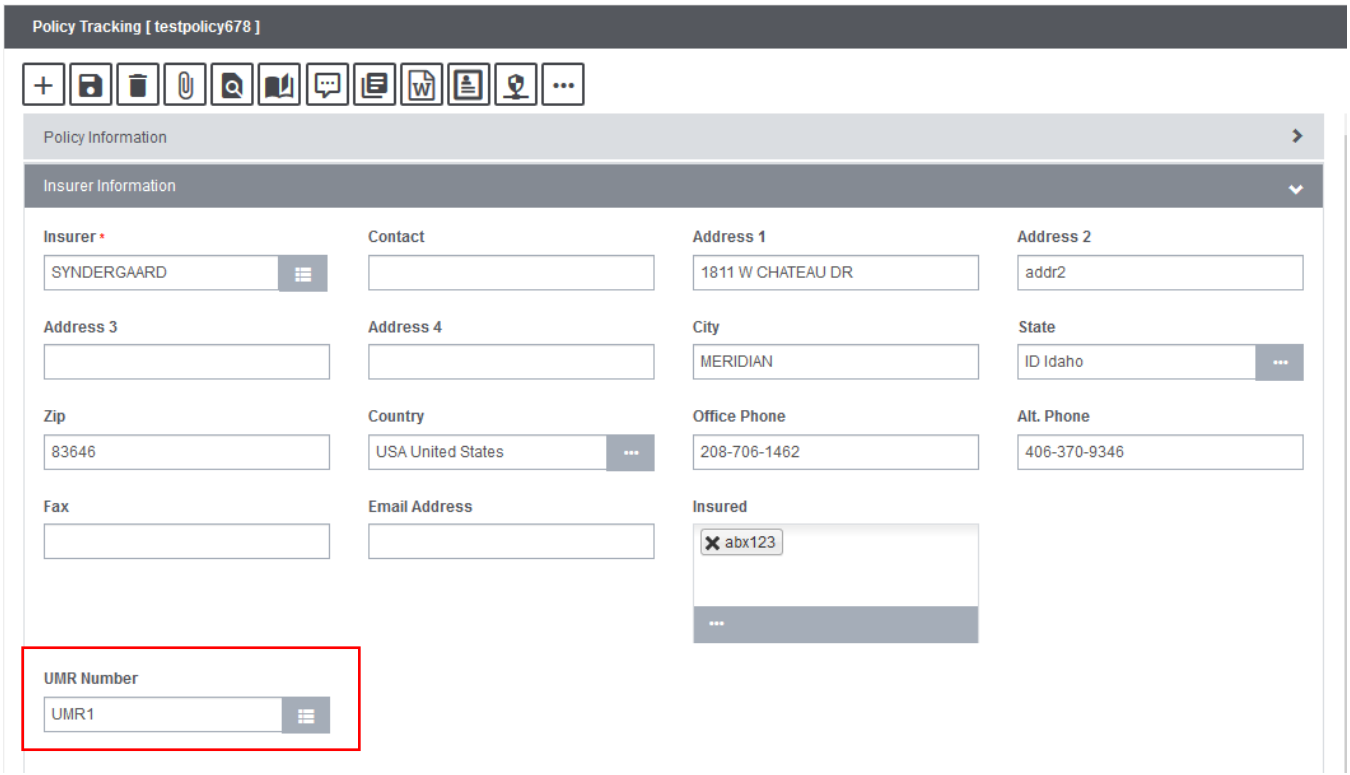
The Insurer information accordion of Policy Tracking and Policy Insurer screen now displays a new UMR Number field. [Fig. 17] However, the newly introduced field will be displayed only if the **Client Program** setting in the **Utilities** zone is enabled. Furthermore, it will be displayed in the editable mode only if the selected Insurer is linked to the Client program. In case the selected Insurer is not linked to the Client Program, then, the UMR number field will appear in read-only mode.

DXC Assure Claims screen



[Fig. 17]

Similarly, moving forward UMR Number will be displayed in Record Summary screen and Policy Insurer grid of the Policy Insurer window as well.

Additionally, select the UMR lookup button to open the window displaying UMRs associated with the Insurer. The data is filtered based on the Policy Expiration Date. That is, if the Policy Expiration Date of a Policy lies between the Effective and Expiration Date of a UMR, then, the UMR will filtered and displayed in the lookup table. [Fig. 18]

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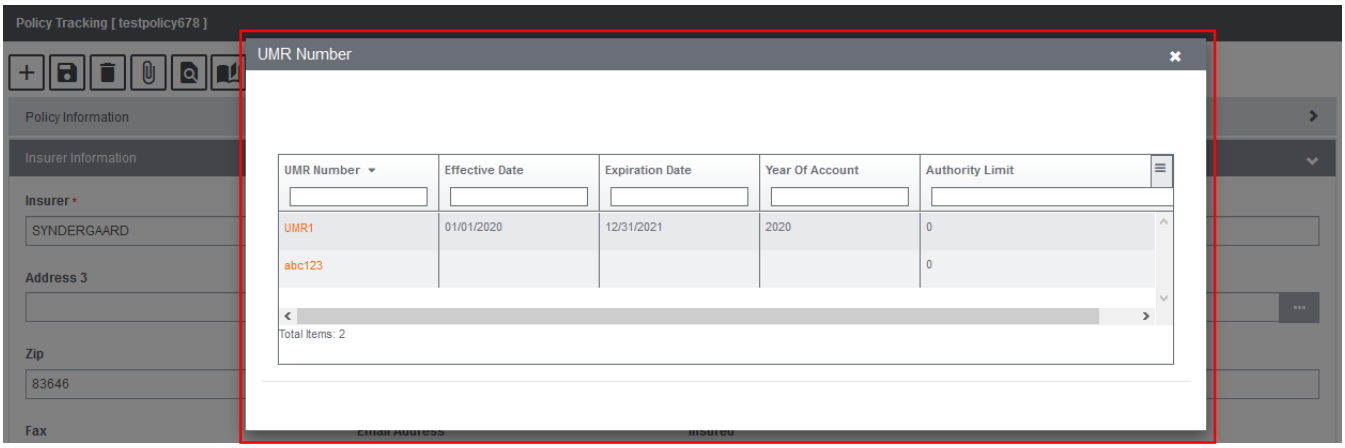
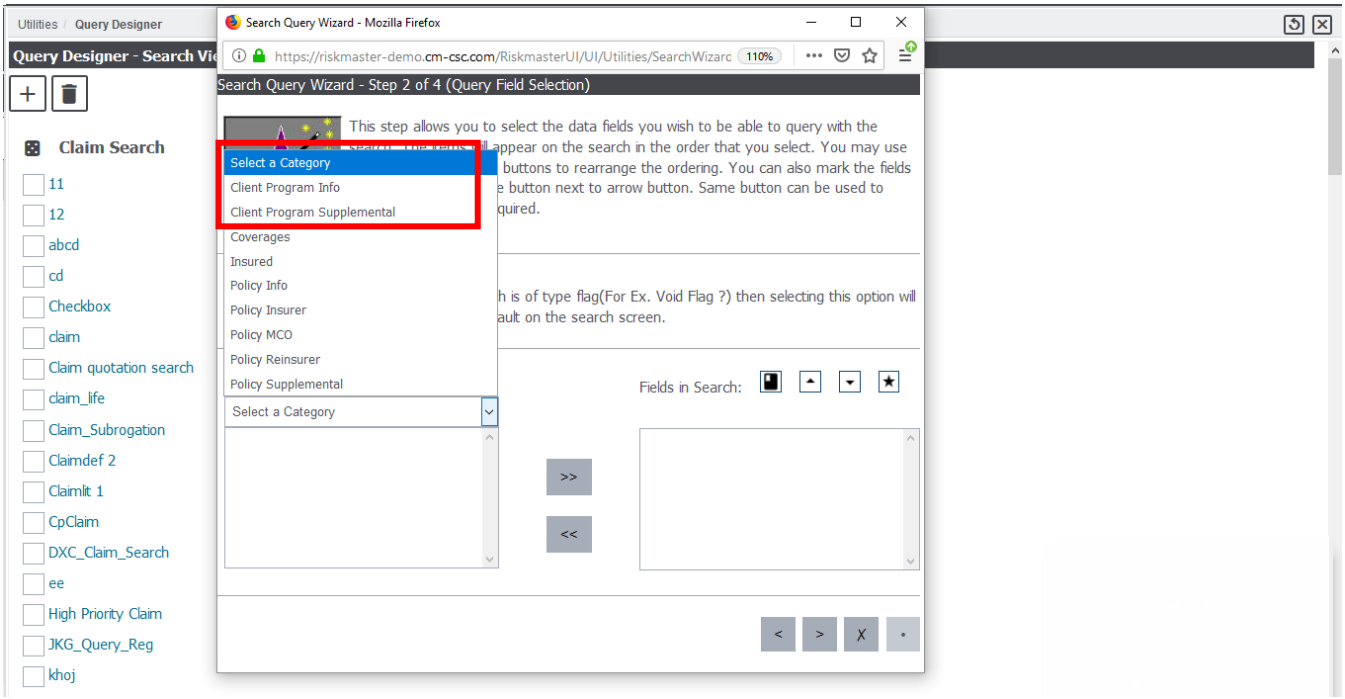
DXC Assure Claims screen



[Fig. 18]

On the similar line, on the **Query Designer** screen of the **Utilities** zone, search views can be created with 3 new categories namely, **Client Program Info**, **Client Program Supplemental** and **UMR**. [Fig. 19]

DXC Assure Claims screen



[Fig. 19]

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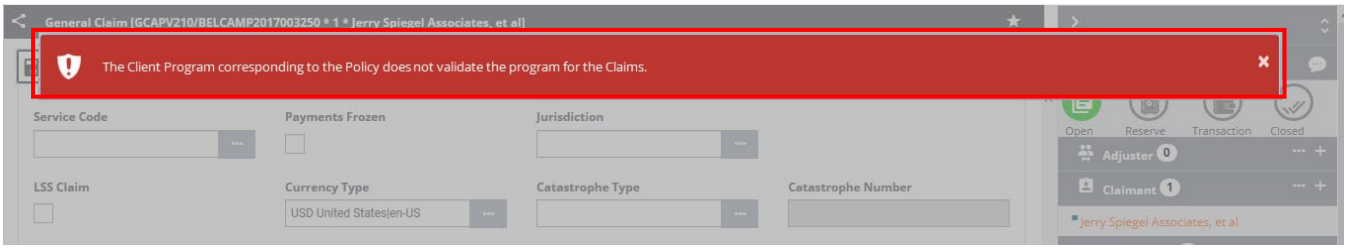
Introduction of new Validation Rules

Three new default validation rules have been added to the Client Program module in this release. The default system validations not only make it easier to meet business requirements of the users, but also help in identifying discrepancies on the Client Program, Claims and Policy screens.

if the **Claim** is associated to any **Policy** and **Client Program**, then, the Client Program on the Policy should match with that of the Claim. In case, the Client Program attached to the Policy and Claim are different, then, an error message will be displayed. **[Fig. 20]**

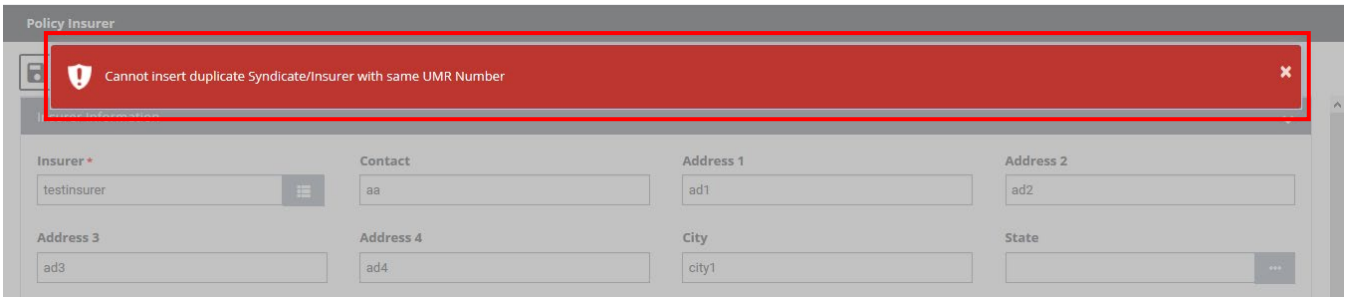
DXC Assure Claims screen



[Fig. 20]

The latest release prevents **duplication** in the **Policy Insurer record**. Moving forward, an error message will be displayed when a new Insurer is added to a Policy if the combination of Insurer and UMR number is repetitive. **[Fig. 21]**

DXC Assure Claims screen



[Fig. 21]

In case, the new Insurer is repetitive, but the associated UMR number is different, then, the data will be saved, and no error message will be displayed.

Additionally, if a **Policy** has a **Client Program** as well as **Insurers** that are linked to the Client Program, then, a confirmation popup will be displayed whenever an attempt to change the Client Program is made. **[Fig. 22]**

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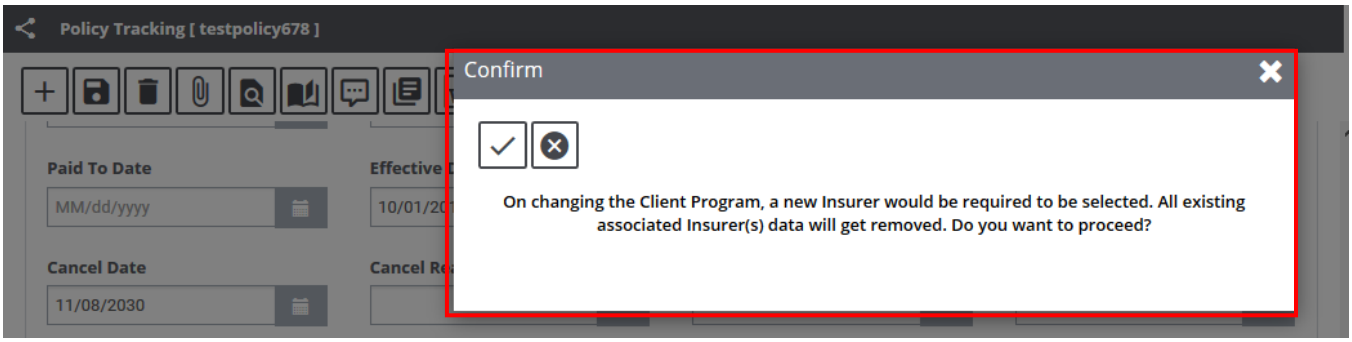
DXC Assure Claims screen



[Fig. 22]

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DXC Assure Claims

DXC Assure Claims is an integrated Claims Administration Platform that consolidates multiple functions into one cohesive solution to provide accurate and up-to-date business functions using the latest technology.

This browser-based software provides real-time analytics to help you spot trends and mitigate future losses. It gives your staff a highly efficient system that simplifies workflows and promotes best practices throughout your organization. It helps ensure that your claimants receive first-class service, besides providing your management team with a means to track key metrics to control costs and improve performance.

READ MORE ON THE DXC CLAIMS MICROSITE

DXC BLOG – INSURANCE & TECHNOLOGY

Thousands of Risk and Claim professionals rely on DXC Assure Claims to manage all types of Claims, making it one of the industry's leading Claims Management Systems. This active client community ensures that DXC Assure Claims is continually supported and enhanced – keeping your Claims processing running smoothly today and in the future.

Contact Us

The Assure Claims Support Center provides manned telephone support services at these times –

8:00 AM – 8:30 PM, EST, Monday through Friday.

Additional and after-hours coverage may be available upon request.

risksupp@dxc.com

1-877-275-3676

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DXC TECHNOLOGY

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Assure Claims Support Helpdesk

Phone: 1-877-275-3676
Email: risksupp@dxc.com

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