



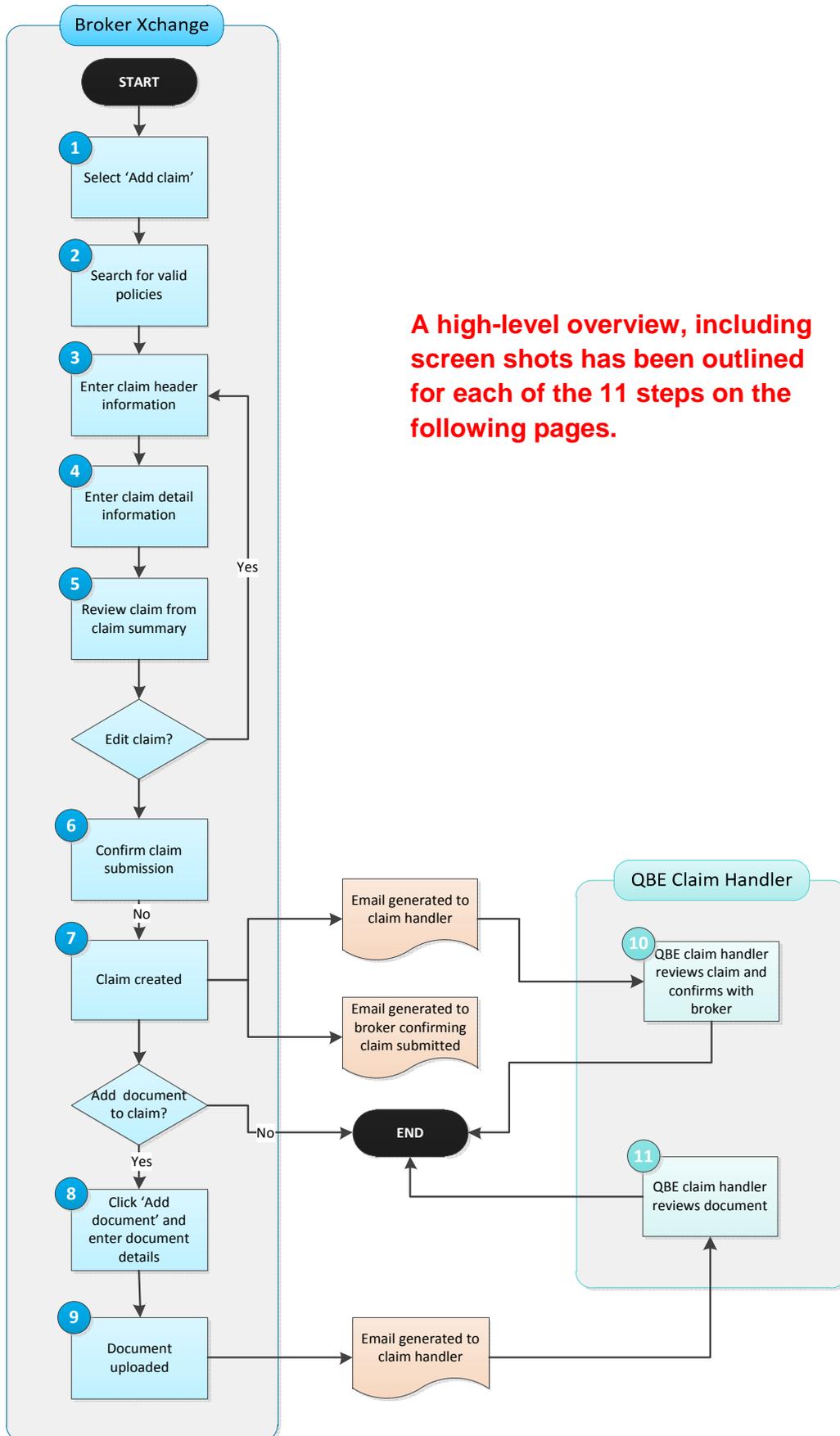
QBE

**BROKER XCHANGE
CLAIMS
QUICK START GUIDE**

V0.1

Creating a claim in Broker Xchange

Broker Xchange Claims Workflow



A high-level overview, including screen shots has been outlined for each of the 11 steps on the following pages.

1 Select the Claims tab at the top of the Home screen and click 'Add claim':

NB: You can also select 'Add claim' from the Policy Summary screen within 'Quotes and Policies' section of Broker Xchange

2 Enter loss details and click 'Find':

Search results

Client name	Policy number
TEST	P000037582CAF

Select a valid policy from the search results or if no results are displayed then try searching again with a different date of loss. You will be notified if a claim cannot be created (e.g. if the policy is lapsed, cancelled, the policy version is in renewal for the date of loss entered or a claim has already been created with same loss details). Contact your QBE Claim Handler if you cannot find any valid policies.

3

Enter claim header information and click 'Next':

Home Quotes and Policies **Claims** Natural Disasters Library Contact Us Help and Support

Add claim **Claim header** Claim detail Claim summary

Basic details

Client name	TEST	Date of loss	01/03/2012
Policy number	P000037582CAR	Reported date	01/03/2012
Period	19/02/2012 - 31/07/2012	Claim handler	Please select
Primary cause	Please select	Secondary cause	Please select
Description			
Risk type	Contractors All Risks - New house		

Next

If there are multiple risks against the policy then you will need to select one from the list. Additional details about the risk will be displayed to help you select the correct risk.

4

Enter claim detail information and click 'Next':

Home Quotes and Policies **Claims** Natural Disasters Library Contact Us Help and Support

Add claim | Claim header **Claim detail** Claim summary

General details

Client name	TEST	Trading name	
Territory of loss	New Zealand	Jurisdiction	New Zealand
Broker ref.			

Parties

No third party detail to display.

Add

Documentation

No documents to display.

Add

Perils

	Sum insured	Approximate claim reserve	Approximate fee reserve	Total reserve per peril
Contract Works Company Earthquake	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00
Contract Works	\$845,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Total approximate claim reserve (excl. GST and net of excess)				\$ 0.00

Declaration

I/We declare that

- the information and answers given above are true and correct. I/We have not withheld any information likely to affect QBE's consideration of the claim;
- I/We understand that QBE requires this information (which will be retained by QBE) to evaluate the claim. I/We understand that the Privacy Act 1993 entitles me/us to have access to and request the correction of the information;
- QBE is authorised to disclose information contained herein to QBE's advisors, reinsurers and to other insurers. I/We authorise QBE to obtain, from any other party, information that is, in QBE's view, relevant to this claim;
- I/We have the insured's permission to make this claim declaration and submit this claim on the insured's behalf;

I/We Agree

Next

Please add third party details

Third party details

Motor vehicle involved Awaiting confirmation

Fault Please select

Name

Party type Please select

Party reference

Uninsured third party Third party insurer

Contact details

Address details

Street address

Suburb

City/Town

Postcode

Country New Zealand

Home phone Office phone

Email Mobile

Other vehicle details

Vehicle registration

Year

Make

Model

Name Party type Fault

Test Third Party Third Party Disputed Delete

Add

Description Type File

Test claim form Claim Form Claim form example document.txt Delete

Add

Third party or document details are displayed once added. Click the text links to edit details or click delete to remove.

Add estimates of the claim or fee reserves excluding GST and net of excess

NB: Dependent of the claim type entered, additional details not shown in the screen shot above will need to be entered (for example motor, liability, property, marine, personal accident / redundancy and warranty) .

Some claims types have additional fields to assist you in entering claim details:-

This drop down will be un-editable if only one vehicle and vehicle details will be defaulted. If there are multiple vehicles on a policy then select the relevant vehicle from the drop down. If the vehicle is not in the list then click 'Update vehicle details' and enter required information. The claim handler will be notified.

Motor and motorcycle claims

Vehicle details	
Vehicle	Please select <input type="button" value="Update vehicle details?"/>
Vehicle registration	Vehicle year
Vehicle make	Vehicle model
Insured market value	Glass only <input type="checkbox"/>
Place of accident / theft	

Property claims

This drop down will be un-editable if only one property and situation of loss details will be defaulted. If there are multiple properties on a policy then select the relevant property from the drop down. If the property is not in the list then click 'Update property details' and enter required information. The claim handler will be notified.

Property details	
Sum insured	Indemnity / replacement Please select <input type="button" value="Update property details?"/>
Property Address	
Situation of loss	
Items involved	

Vessel details are defaulted from the policy information but if the information requires updating then click 'Update vessel details' and enter required information. The claim handler will be notified.

Marine claims

Marine details	
Vessel	<input type="button" value="Update vessel details?"/>

5 Review the claim information from the claim summary screen. Click 'Edit' to view / update information (this will take you back to the claim header).

Home | Quotes and Policies | **Claims** | Natural Disasters | Library | Contact Us | Help and Support

Add claim | Claim header | Claim detail | **Claim summary**

Claim details

Risk type	Contractors All Risks	Date of loss	01/03/2012
Client name	TEST	Status	Unsubmitted claim
Policy number	P000037582CAR	Claim handler	Linda Evans
Period	19/02/2012 - 31/07/2012	Broker ref.	AB/123456
Description	Example claim for Contract Works		

Parties

Third Party	Test Third Party
-------------	------------------

Documentation

Claim Form	Claim form example document.txt
------------	---------------------------------

Perils

	Sum Insured	Approximate claim reserve	Approximate fee reserve	Total reserve per peril
Contract Works Company Earthquake	\$0.00	\$0.00	\$0.00	\$0.00
Contract Works	\$645,000.00	\$50,000.00	\$0.00	\$50,000.00
Total approximate claim reserve (excl. GST and net of excess)				\$50,000.00

Claim comments: - Claim reserve value => \$50K. ← Additional comments for the claim handler are listed here

Claim will only be submitted to QBE once 'Submit claim' action has been completed.

Until the 'Submit claim' process has been completed no claim will be submitted to QBE

Actions

Submit claim

6 To submit the claim to QBE, click 'Submit claim'. Add any additional information in support of the claim (e.g. preferred assessor etc.) and click 'Submit claim':

Please confirm claim submission

You now have the opportunity to provide additional information, in support of this claim. The following comments will also be flagged to the claims handler:

- Claim reserve value => \$50K.

You will receive an email confirmation once the claim has been successfully submitted to QBE.

Go back **Submit claim**

7 Once the claim has been successfully submitted, the claim summary screen will appear indicating a claim number, claim handler and any additional comments entered.

Home	Quotes and Policies	Claims	Natural Disasters	Library	Contact Us	Help and Support
Find /add claim	Claim summary	Events	Request an update	Report a development	Payment history	Documents
Claim details						
Claim number	FC000052884	Date of loss	1/03/2012			
Client name	TEST	Status	Live Open Claim			
Policy number	P000037582CAR	Claim handler	Linda Evans			
Period	19/02/2012 - 31/07/2012		Broker ref.	AB/123456		
Description	Example claim for Contract Works					
Parties						
Third Party	Test Third Party					
Perils						
Contract Works						
	Paid to date	O/S reserves	Incurred			
Claim	\$0.00	\$50,000.00	\$50,000.00			
Fees	\$0.00	\$0.00	\$0.00			
Total	\$0.00	\$50,000.00	\$50,000.00			
Recoveries	\$0.00	\$0.00				
<i>All figures exclude GST</i>						
Claim comments:	Claim reserve value => \$50K. Additional comments from Broker: Please process this claim ASAP - thanks!					
Actions						
						Add document

You will also receive an email confirming the claim number and information (including attachments) provided to QBE.

	Claim FC000052884 for TEST has been submitted (Broker Ref. AB/123456) QBE Broker Xchange to: asmith Please respond to levans
▼ 1 attachment	
	Claim form example document.txt
Dear Broker	
Claim No.	FC000052884
Client	TEST
Description	Example claim for Contract Works
Risk type	Contractors All Risks
Broker Ref.	AB/123456
The above claim has been submitted to Linda Evans at QBE, who will contact you within 24 working hours.	
Thank you for using QBE's Broker Xchange.	

8 To add new documents to a claim, click 'Add document' from either the 'Claim summary' or 'Documents' page. The following screen will appear:

Enter document details and click 'Save'. The below message will be displayed while the file loads (this may take some time depending on the size of the file). Refresh the page by clicking to another tab and then back to 'Documents'.

Actions

Your file has been uploaded. It may take a few minutes to appear on our list as it passes through our security scans.

[Add document](#)

9 Once the document has been uploaded, it will appear in the documentation list on the 'Documents' page and the QBE Claim Handler will receive email confirmation.

Description	File name	Type	Where added	When added
Test Assessor Report	Test Assessors Report.txt	Assessors	Documents	01/03/2012
Test claim form	Claim form example document.txt	Claim Form	Add claim	01/03/2012

NB: Documents added on the 'Request an update' or 'Report a development' page will also appear in this list.

10 Once a new claim is submitted the QBE Claim Handler selected in step 3 will be notified and will review the claim and confirm progress or if additional detail is required.

11 Any documents added through Broker Xchange will be reviewed by the QBE Claim Handler. See the 'Events' or 'Payment history' page also for additional detail.