

BROKER XCHANGE CLAIMS QUICK START GUIDE

V0.1

Creating a claim in Broker Xchange

Broker Xchange Claims Workflow



Claim number Add claim Policy number Client code Key words (car reg # / broker ref #) Date of loss State NF End Claims in the last 3 months Include closed claims? Search tip - You can use % as a widecard, for example: sun% will find sung, suns, sunset, sunset. Claims in the last 12 months Claims i	Search for claims				Acti	ons		
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l l l l l l l l l l l l l l l l l l l	TEST							
Select a valid policy from the search results or if no results are displayed then try searching an	TEST				ما میں مالیہ میں	سبلا مرجالا امحرر		
	TEST Select a valid p	policy from the s	earch results or	if no result	ts are displa	iyed then tr	y searchii	ng again

	This claim cannot be submitted.
A claim with this date of loss cannot be created as the policy version is currently in renewal.	Claim Number FC000052672 with the same policy number, date of loss and risk type has already been lodged with QBE.
Please select another date of loss or contact your QBE Claims Handler.	Please contact your QBE Claims Handler.
Close	
	Ok

Enter claim header information and click 'Next': 3 Claims Natural Disasters Library Contact Us Help and Support Home **Quotes and Policies** Claim header Claim detail Claim summary Add claim **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 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. Next

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Enter claim detail information and click 'Next':



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 defaulted. If there are multiple vehi from the drop down. If the vehicle is and enter required informa	e if only one vehicle and vehicle details will be cles on a policy then select the relevant vehicle s not in the list then click 'Update vehicle details' ation. The claim handler will be notified.
▼ Update vehicle details?	
Vehicle year	
Vehicle model	
	Glass only
	This drop down will be un-editable defaulted. If there are multiple vehi from the drop down. If the vehicle is and enter required information of the vehicle details?

operty claims		will be defaulte property fror property detail	d. If there are multiple n the drop down. If the s' and enter required	e properties on a policy then e property is not in the list the information. The claim hand	her will be notifie
Property details					
Sum insured		Inde	emnity / replacement	Please select	-
Property Address	Please select	Upd	ate property details?		
Situation of loss					*
					Ŧ
Items involved					*

M	arine claims	Vessel details are defaulted from requires updating then click 'Update The claim h	the policy information but if the information vessel details' and enter required information. andler will be notified.
	Marine details		
	Vessel	Update vessel details?	

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 Polici	es Claims	Natural Disasters	Library	Contact Us	Help and Suppor	t
Add claim Claim header	Claim detail	Claim summary				
Claim dotails						
Risk type Cor	tractors All Risks		D	ate of loss	01/03/2012	
Client name TEG				atue	Unsubmitted o	laim
Policy number P00	00037582CAD			aim handlor	Linda Evans	
Poriod 19/	100313020AR	10			AP/122456	
Period 13/		12		okei iei.	AD/123450	
Description	imple claim for Con	ITACL WORKS				
Parties						Edit
Third Party Tes	t Third Party					
Documentation						
Claim Form Clai	m form example do	cument.txt				
Perils						
	Sum	Insured	Appro reserv	ximate claim re	Approximate f reserve	fee Total reserve per peril
Contract Works Company Ear	thquake \$0.00		\$0.00		\$0.00	\$0.00
Contract Works	\$645,	000.00	\$50,00	0.00	\$0.00	\$50,000.00
Total approximate claim rese	erve (excl. GST ar	nd net of excess)				\$50,000.00
Claim comments:	- Clai	m reserve value => \$50K.		 Additional co 	omments for the clain	n handler are listed here
Claim will only be submitted to QB	E once 'Submit clain	n' action has been complete	ed.			
Actions					U	Intil the 'Submit claim' process has been completed no claim will be submitted to QBE
Actions						Submit claim

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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 submiss	ion 🛛
You now have the opportunity to provide additional information, The following comments will also be flagged to the claims hand - Claim reserve value => \$50K.	in support of this claim. ller:
	*
You will receive an email confirmation once the claim has been to QBE.	successfully submitted
Go back S	ubmit claim

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 a	nd Policies	Claims	Natu	ral Disasters	Libra	ary	Contact Us	Help	and Support	
Find / add claim	Claim sumn	nary Ev	ents 1	Request an up	odate	Rep	ort a develop	ment	Payment history	Documents
Claim details										
Claim number	FC00005	52884				Date	of loss		1/03/2012	
Client name	TEST					Statu	IS		Live Open Claim	
Policy number	P000037	582CAR			Г	Clair	n handler		Linda Evans	
Period	19/02/20	12 - 31/07/20	012			Brok	er ref.		AB/123456	
Description	Example	e claim for Co	ontract Wo	orks						
Parties										
Third Party	Test Thin	d Party								
Perils										
Contract Works										
	Paid to	date			O/S rese	erves			Incurred	
Claim	\$0.00				\$50,000.0	00			\$50,000.00	
Fees	\$0.00				\$0.00				\$0.00	
Total	\$0.00				\$50,000.0	00			\$50,000.00	
Recoveries	\$0.00				\$0.00					
All figures exclude GST	r									
Claim comments:	Claim res Additiona	serve value = al comments	> \$50K. from Brok	ter: Please proce	ess this c	claim A	ASAP - thanks!			
Actions										
									A	dd document

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

	laim FC000052884 for TEST has been submitted (Broker Ref. AB/123456) BE Broker Xchange to: asmith	
 1 attachment 		
Claim form examp	e 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 usi	ng QBE's Broker Xchange.	
ance – Commercial In (Confidence	P

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

Please	e add a document
Description	
Туре	Please select
File	Browse
	Save

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

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

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.

Home Quotes and	Policies Cla	ims Na	tural Disasters	Library	Contact Us	Help and	Support	
Find / add claim C	Claim summary	Events	Request an up	late F	Report a develop	ment Pa	ayment history	Documents
Claim details								
Claim number	FC000052884			Da	ate of loss	1/03/2	012	
Client name	TEST				tatue	Live O	nen Claim	
Policy number	D000037582CA	D			laim handlor	Linda	Fuana	
Policy number	10/00/2010 21	107/2012				Linua I	2450	
Period	19/02/2012 - 31	1/07/2012			IOKET TET.	AB/12	3450	
Description	Example claim	for Contract	VVOrKS					
Claim reports								
Claim history by client					Downloa	ıd	Email	to myself
Claim history by policy					Downloa	ıd	Email	to myself
Documentation	Click the file nar	ne to view t	he document		Click t	he anv of the	header text to so	tdocuments
Description		File n	ame		Туре	Wh	ere added	When added
Test Assessor Report		Test A	ssessors Report.txt		Assesso	ors Doo	cuments	01/03/2012

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

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.

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.

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Add document