

## **Managing Accident Reports: Getting the most out of your Norse Systems software.**

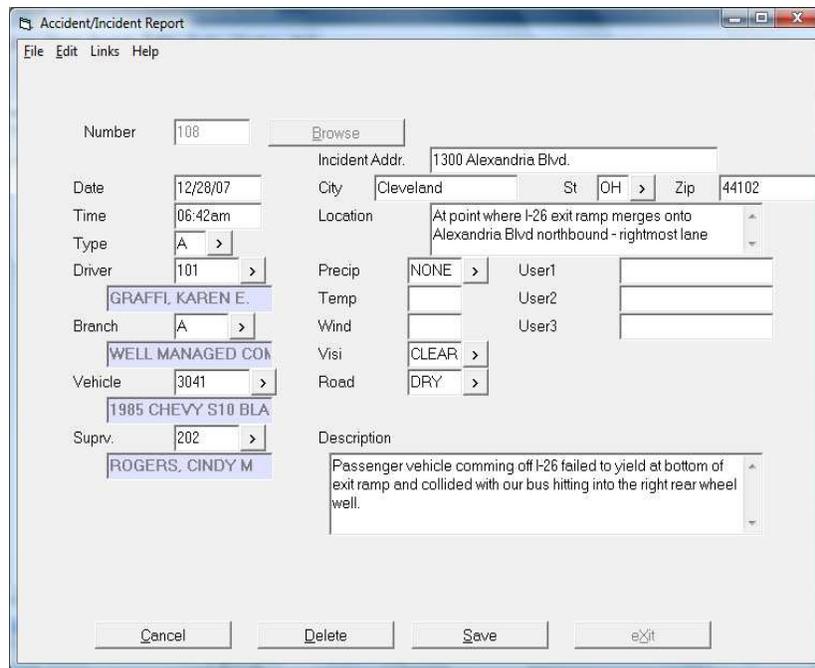
### **Introduction: Conceptual Overview.**

Dealing with incidents involving your fleet and drivers, especially dealing with all the paperwork, can be stressful. That is why Norse Systems has developed their Accident Report software to effectively gather and catalog the information your organization needs to protect itself from exploitation and minimize costly and time consuming organizational blunders commonly associated with accidents.

The guiding principle behind the Accident Report software is centralization. Norse understands the value of having all the pertinent information regarding the incident at the users' finger tips. With centralization and organization comes more efficient and effective communication within your organization. Norse's Accident Report software utilizes their easy to use Screen Driver interface to navigate between various screens and windows that contain all the essential information regarding incidences from a single overview screen. From the Accident Report screen users can access and maintain information regarding vehicles involved, parties involved, insurance claims filed, police officers involved, financials, and litigation. In addition to the formal predefined screens designed to capture specific data there are communication functions that allow for the free flow of information and documentation within your organization. Properly utilized, Norse's Accident Report software will ensure that nothing “slips between the cracks” and your organization is in a position to accelerate through and move beyond potentially damaging and costly incidences.

### **Getting Started: Gathering the Basic Information.**

When there is an accident or incident involving your organization it is essential to gather as much information as possible; think who, what, when, where and how. Norse makes this easy for you by providing specific data entry fields designed to capture the most essential information regarding the accident/incident. Your first stop should be the “Accident Records” screen, located in the “Employees” menu of Charter Order Entry. *(See sample screen below: note that this screen is fully populated with sample data)*



Now you have arrived at the epicenter for all things regarding the documentation and maintenance of accident reports. To view an existing accident report simply click the browse button to the right of record “Number” field and select from a list of existing records or enter the record number for the accident report you would like to view.

To create a new record hit enter while there is a blue highlighted “NEW” in the “Number” field. This will automatically generate an accident record number for future reference. You have now created a new accident record and can now begin to gather and enter data. Go through this screen carefully, making sure to document as much information as you can. Remember that the more complete your records are the better equipped your organization will be to deal with any subsequent complications that may arise from this incident. Don't forget to save all new entries and changes that you make to records.

***Note:** If at any time you have a question regarding an individual data entry field, such as “Temp” or “Road”, and need guidance as to what the entry should consist of please use the online “Help” link in the top bar. All screens associated with Accident Report are fully equipped with on line helps to assist the user as he or she encounters individual questions about specific fields and their functions.*

### **Accident Report Links: Utilizing Accident Report’s Organizational Powers to the Fullest.**

Once you have created an initial report by populating the main Accident Report screen with as much data as you can the next step will be to gather information and document other, more specific, aspects of the accident. Norse’s Screen Driver user interface uses “Link” screens that are sub-screens of the initial accident report. These screens are permanently associated with the accident record they are attached to. These link screens are individually designed to gather and catalogue important information specific to the vehicles involved, the people involved, the insurance companies involved and subsequent claims, as well as screens to document and track potential litigation as well as others. (See sample screen below for depiction of a link screen options.)

In the above sample screen you can see the list of link screen options. For some accidents or incidents you may not need to go through all of these link options to make a complete report of the accident, as some categories of information may not be applicable. But for the more serious accidents it is likely that you will want to use all of these link screens to capture and catalogue very important information about the accident itself and subsequent events associated with it. Remember, the more documented information you have about these accidents/incidents the more efficient your organization will be in dealing with the aftermath. Let's dissect the link screens one by one to go over their individual functions and explain their relevance to the smooth handling of accidents/incidents within your organization.

### Accident Report Links: Officers (Investigating Police Officers)

Use this Link Screen to document contact information for attending officer(s) to the accident/incident as well as to reference any accompanying police reports or citations that resulted. If there was more than one officer attending the accident/incident then simply append a new line to accommodate their unique contact information. To do this simply click on "lines" on the top bar of this screen and select "append" to add as many lines as needed. (See the sample "Investigating Police Offices" screen below)

LNF Name	Badge No.	Jurisdiction	Phone	Doc/Ref
EARP, WYATT	007	TOMBSTORE SHE	(655) 123-4567	

### Accident Report Links: Vehicles (Other Involved Vehicles)

This link is used to document the *other* vehicle(s) involved, your organization's vehicle information was already captured in the main Accident Report screen. This screen provides columns for essential information about the other vehicles including license plate number, and VIN#. Gather and document as much of this information as possible. This screen functions much the same way as the Investigating Officer screen, it will accommodate many different vehicle's information, simple append lines as needed, the same as described above. (See sample *Other Involved Vehicles* screen)

The screenshot shows a window titled "Other Involved Vehicles" with a menu bar (File, Edit, Lines, Help) and a table. The table has the following columns: VN/Vin#, Make, Model, Year, VehTag#, St, and Expires. The first row contains the following data:

VN/Vin#	Make	Model	Year	VehTag#	St	Expires
1 222-4225582SP	INTERNATIC	SNOMASTE	72	858999	NY	12/01/07

At the bottom of the window are "Cancel" and "Apply" buttons.

### Accident Report Links: Parties (Party to Accident)

The "Parties" link is used to document other people and their involvement in the accident/incident. Usually this screen is used to document personal information regarding other drivers involved. But this screen can also be used to gather personal and contact information regarding third parties such as eye witnesses etc. In regards to identifying each documented person's roll in the accident/incident Norse has provided a "Party's Roll" field to indicate, from a predefined browsable list of potential rolls, what roll this person may have played in this accident/incident. Go through this screen carefully and enter as much information as you can, don't forget to return to these records as more and more information comes to your organization, as it usually takes a few days for all the necessary information to surface. (See sample *Party to Accident* screen below)

The screenshot shows a window titled "'114' Party to Accident" with a menu bar (File, Edit, Links, Help) and a form. The form contains the following fields and values:

- Party No.: 2 (with a "Browse" button)
- Last Name: JOHNSON
- First Name: JAMES
- Address: 525 N. MADISON AVE
- City: PITTSBURGH
- State: PA
- Zip: 15231
- Phone: (215) 888-3333
- Lic. No.: 25857899C
- Lic. State: PA
- DateOfBirth: 03/17/79
- Party's Roll: D
- Veh. No.: 1
- Injured:  NC  Y
- Ambulance:  NC  Y
- Citation: VA54287
- Remarks: Cited for 'Careless & Reckless' as well as DUI.

At the bottom of the window are "Cancel", "Apply", and "exit" buttons.

## Accident Report Links: Companies (Insurance Company Information)

The “Companies” link is where you should document insurance company information for all parties involved. This screen will help you organize, by party, claim numbers, policy numbers, contact information etc. that is essential to maintaining a complete insurance record of the incident. This link screen is designed to accommodate multiple insurance companies’ information for the multiple claims that may be associated with this accident/incident, be those claims of your own or claims made by other parties involved. That said, it is important to assign the correct party to each insurance company record; otherwise it will not be clear as to who this insurance record is for. This assignment can easily be done by using the browse function beside the “Which Party” field and then selecting from a list of all the parties that you have previously identified in the “Party to Accident” screen. Party number ‘1’ typically is your driver. (See sample screen below)

Line No.	1	Browse	
NAIC Numb.	29424	DMV No.	084
Ins Co Name	THE HARTFORD C1-36 HARTFORD PLAZA HARTFORD, CT 06115-1703		
Policy No.	5858546AL	Expiration Date	12/31/08
Which Party	2	Contact Person	JAMES W. SMITH
Which Vehicle	2	Contact Phone	(203) 555-1212
		Contact Fax	(203) 555-2121
		Contact eMail	jwsmith@hartfordins.cor
		Claim Number	54545896-5421
		Claim Date	01/27/08

Buttons: Cancel, Delete, Apply, eXit

As you can see in the screen above, there is also a field to indicate which vehicle involved in this accident/incident this insurance record is for. Again, browse to select from a list of vehicles that you have already created by entering them into the accident/incident record “Vehicles” screen. As with all the screens related to accident reports it is important to gather as much information as possible. Remember, if at any point you are uncertain of what information to enter into a field use the help link on the top bar.

## Accident Report Links: Litigants

Capture information here regarding any litigation that resulted from this accident/incident. Particularly contact information for the law firm that is handling the litigation. To enter a new litigating party record the first step must be to assign a ‘Litigating Party’. The ‘Litigating Party Number’ is in reference to the parties to the accident, meaning that the party number assigned is the party that is being represented by the law firm (party numbers as were assigned in the ‘Parties’ link). Browse the “Litigating Party Number” field to retrieve an existing litigant record. It is never a good thing when litigation results from accidents/incidences but when it occurs you need to be ready to document it. (See sample screen below)

### Accident Report Links: Financials

A unique screen that is designed to give managers a tool to track financials associated with accidents/incidents. This screen can really be considered optional but when utilized properly provides managers with a quick overview of the cost and recoveries that resulted from this accident/incident. Costs represent expenses that your organization incurred as a result of this accident and recoveries indicate how much your company received in compensation for these costs. This screen is not intended to function as an actual accounting tool. (See sample screen below)

### Communication Tools: Effective Coordination and Management Tools

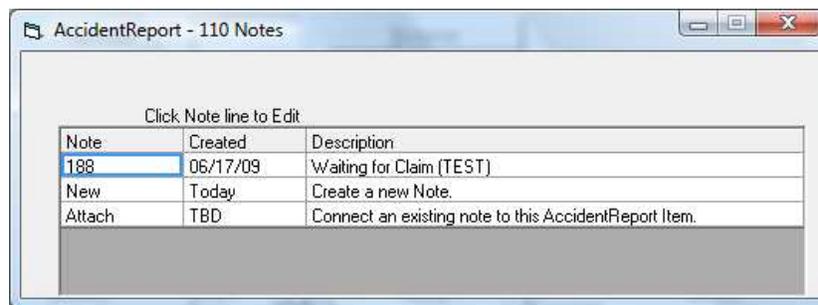
Clearly your organization needs to communicate efficiently in order to function effectively. Norse has developed communication tools that are present throughout their software and Accident Report is no

exception. Although these functions are omnipresent throughout Norse applications, and discussed in detail in Norse's Screen Driver User Manual, they warrant a discussion in this document because of their particular applicability to Accident Reporting and management. By effectively utilizing ScreenDriver's "Notes Manager", "Attachment" and "Journal/Tickler" functions users can coordinate efforts and keep each other abreast of changes and circumstances regarding records that require action or attention. The free flow of information between users facilitates cooperation and efficiency.

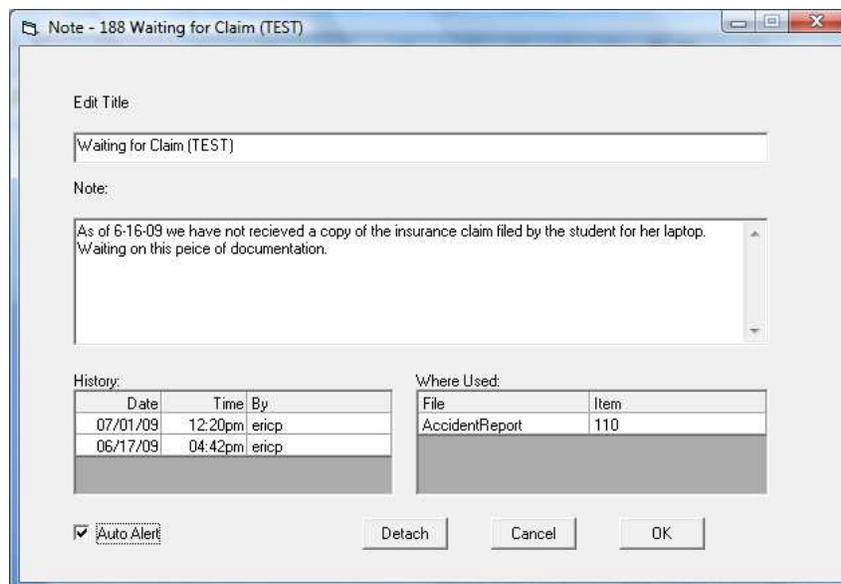
More details regarding the "Notes Manger" and "Journal" functions are documented in the ScreenDriver Users Manual but this manual will provide a brief overview of their functions and uses.

### Communication Tools: Notes

The simplest form of an item attachment is called an ItemNote. The 'Link' to Item notes will always be through the link 'NotesManager.' When you click on this link, you will see a 'Notes Index' window (See sample screen below)



The above screen shows that there is only one note attached to this accident record, Note 188. To 'See' or 'Edit' the specifics of this note the user needs only to click on the note number. The sample screen below shows the content of Note 188.



As you can see the 'Note' detail contains a Title, a note Text area, a History list, and a 'Where Used' list. You are free to edit both the Title and the Note per se, however the History and Where used are

maintained automatically by the system. The History tells you all of the people who have made changes to this note item. The 'Where Used' list shows all of the records that this note is attached to.

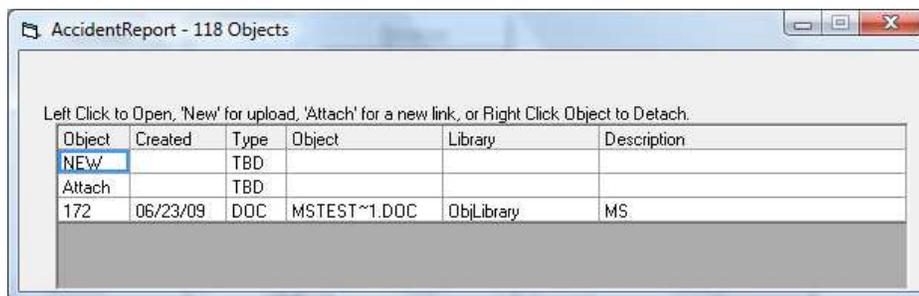
The 'Auto Alert' check box allows you to flag notes that may be critically important. This has the effect of *automatically* alerting all users that open this record for maintenance. It is important to heed these auto alerts, linking to 'NotesManager' in order to check the content of the note.

### Communication Tools: Attachments

The next form of 'Attachables' is simply called 'Attachments'. These are basically Microsoft files. The system currently supports uploading, storing, indexing, and attaching objects with 'File Type' extensions as listed below.

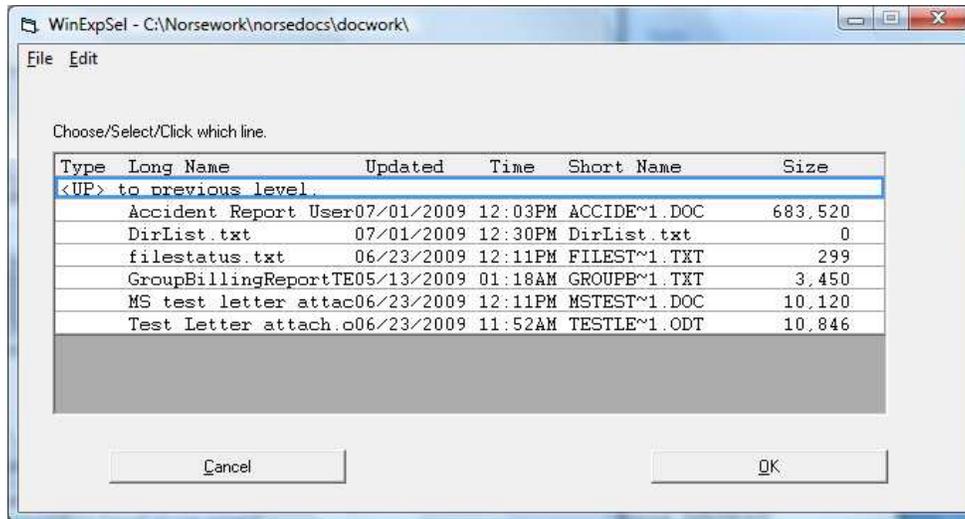
SORT ObjTypes 03:59:05pm 29 Jan 2009 PAGE 1				
Obj. Description.....	Default.....	MSOfficeOpen...		
Type	Obj Library...			
AVI Video Clips	ObjLibrary	iexplore.exe	iexplore.exe	
BAS uniVerse Basic Programs				
BMP Bit map images	ObjLibrary	paint.exe	sdraw.exe	
DOC MS Word Documents	ObjLibrary	winword.exe	writer.exe	
ITM uniVerse Dynamic Item				
JPG Digital Images	ObjLibrary	iexplore.exe	iexplore.exe	
PDF Acrobat Document	PDFLibrary	AcroRd32.exe	AcroRd32.exe	
RTF Rich Text File	ObjLibrary	wordpad.exe	writer.exe	
TXT Simple text documents	ObjLibrary	winword.exe	writer.exe	
XLS XL Spread sheets	ObjLibrary	excel.exe	scalc.exe	

The access and manipulation of objects is very similar to that of Notes. When an item is loaded for maintenance, you can access it through the link 'Attachments'. An Object Index will appear similar to the one shown below



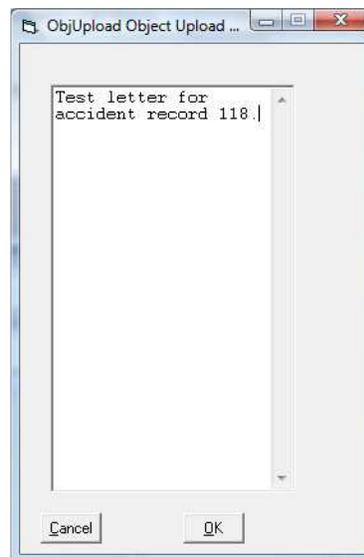
In this example, there is an item loaded for Maintenance. It is a .DOC file type and named 'MSTEST'. The user has four options from this screen: 1) left click the '152' to download/view the object, 2) left-click 'NEW' to upload, index, and attach an new object from your PC, 3) left-click 'Attach' to associate an already server-resident object to this item, or 4) right-click the '152' to detach it from this form.

The 'New' object upload process starts by spawning a browse function against your PC's file system so you can select the DOS file you want to send/attach. (See sample screen below)



The files shown above are stored on the corporate server and denoted with DOS 'Short Names.' When you select an item in this browser, it will be uploaded automatically. If an object with the same DOS Short name already exists, you will be asked if you want to over-write the file already on the server. If you are asked if it is OK to over-write the existing server object, be sure that you know if it is indeed the same file. To navigate through your organization's server for the desired file select the '<UP> to previous level' to view the previous folder, this functions much in the same way as Windows, allowing the user to search for files by moving up and down through collections of folders.

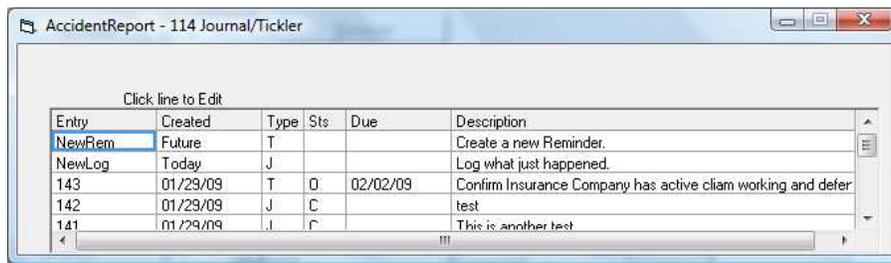
As soon as the file upload is finished, the server will automatically create and index record for it, and ask the user to enter a description of the object so it can be found later on by other users. The description entered for this uploaded object will be called upon by the 'Key Word' search function if a user decides to attach this object to another record at a later time and does not know the specific object number. (See sample screen below)



## Journals and Ticklers

The last type of Screen Driver Attachable is the 'Journal/Tickler' entry. The link item for these is

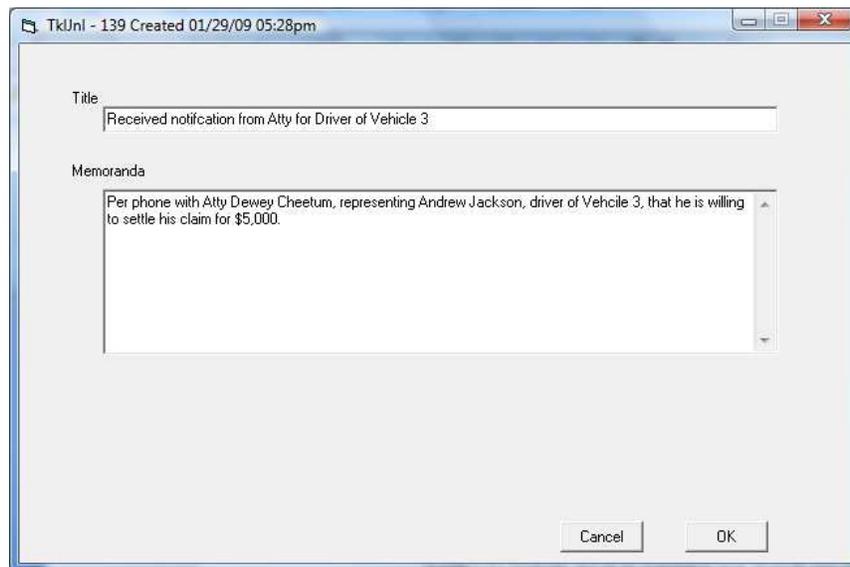
‘JournalManager’. Just as with ‘ItemNotes’, and ‘Attachments’, the process begins with an index window. (See sample screen below)



Entry	Created	Type	Sts	Due	Description
NewRem	Future	T			Create a new Reminder.
NewLog	Today	J			Log what just happened.
143	01/29/09	T	D	02/02/09	Confirm Insurance Company has active claim working and defer
142	01/29/09	J	C		test
141	01/29/09	J	C		This is another test

As the name suggests, Journal/Tickler attachments are more ‘Action’ oriented than the other Attachables. There are two kinds of entries: 1) the Journal or “Log”, which allows you make notes as to some action which has already happened relative to the Item you have open for edit, or 2) a Tickler entry, which allows you to create a reminder to yourself, or to someone else, that at some future point in time something should happen. In the first case, you click the word ‘NewLog’ and in the later case you click the word ‘NewRem.’

Entering a ‘NewLog’ will produce a very simple screen. These ‘Log’ type entries become a part of our records relative the Accident in question. Note that there is no option to ‘delete’ either Log type entries or Tickler type entries. (See sample Journal screen below)



Titel

Received notification from Atty for Driver of Vehicle 3

Memoranda

Per phone with Atty Dewey Cheetum, representing Andrew Jackson, driver of Vehicle 3, that he is willing to settle his claim for \$5,000.

Cancel OK

If you click on ‘NewRem’, to create a Tickler, the entry screen is a little more involved. In addition to the ‘Title’ and ‘Mission’ statement, you will need to define the person (User ID or Department) who should be acting on this Tickler, the Date and Time when they should be ‘Tickled’ to take the action, a specific ‘Task’ they are to perform, and lastly references or instructions which might be helpful to the ‘addressee’ in the performance of the task. As a general rule, state the ‘mission’ as a goal-oriented objective. There may be many ‘Tasks’ taken toward reaching the goal. You’re immediate addressee may be frustrated at the first step – Verify Receipt. They may process the tickler on schedule and have to record ‘Task Complete’, but mission ‘Not Complete.’ In this case, the tickler will be rescheduled, and perhaps re-directed to different addressees. As this sequence of goal-oriented steps are taken, the system will be keeping, and documenting all of the efforts made. (See sample screen below)

TkInl - 143 Created 01/29/09 06:15pm

Title  
Confirm Insurance Company has active clam working and defending us on this accident

Mission  
Contact 'The Hartford' - Claims adjuster James Baker, who took the claim notification verbally over the phone and pledged to mail receipt confirmation. It has not been received and we do not want to be exposed for 'Failure to Notify.'

TO: leifp  
DUE: 02/02/09 08:00am  
TASK: VERDEL - Verity delivery - Unkn  
INFO: 800-555-1212 Clm# 55244783 (?)  
INST:

Mission Accomplished  
TASK:  
NEXT:  
DUE:  
INFO:  
INST:

Task Complete

History Cancel OK