Clearview® User Manual
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For assistance, please call Client Support @ 1-800-727-3071

Clearview® Guidelines

Getting Started
Section 1.1

Go to your Web Browser and type in "www.cna.com".

Click on "Claim" at the top of the screen (just below the CNA logo).

You will see "Risk Management Accounts" in red. Enter your user name and password and click the Login button.

The Risk Management Advantage® portal page appears. Under "Clearview," click on the Clearview 4.1 link.

The CNA Financial - Application Gateway window appears. Type in your user name and password. Click Login. In the Applications window, click on the Clearview icon. Another Applications window will appear. Click on the Clearview icon. Read the contents of the user agreement window and click on OK.

The Clearview Message Center pop-up box appears containing important messages. Click OK to continue.

Clearview® Guidelines

Individual Claim Lookup
Section 2.1 – Lookup Individual Claim

The Select Account for Individual Claims pop-up box appears listing all of your accounts. Select the account desired and click OK. If you have only one account, this pop-up box will not appear.

The Clearview Functions list and Claim Search grid appear.

Click the "+" sign next to any folder under Clearview Functions to view the subset folders. Double click on a folder to view information within that folder.

The Claim Search grid allows you to view, print or export all of your claims or a subset of claims based on your search results. Click List All in order to refresh the data after using the Search feature.
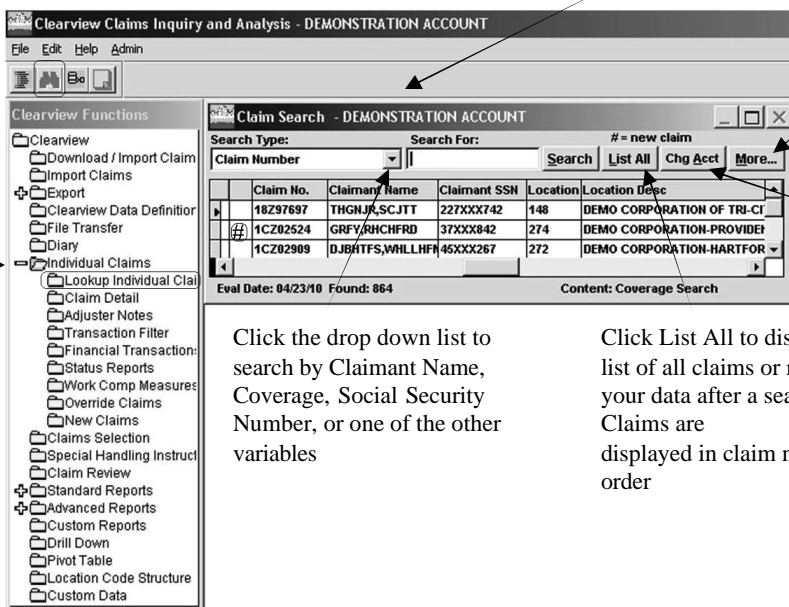
To print, preview, or export your claim list, click on More…

Click the drop down list to search by Claimant Name, Coverage, Social Security Number, or one of the other variables

Click List All to display a list of all claims or refresh your data after a search. Claims are displayed in claim number order

If you have access to multiple accounts, click here to change accounts at any time

If the Claim Search grid is not showing on the right-hand side of your screen, single click on the "+" next to the Individual Claims folder under Clearview Functions, then double click on the Lookup Individual Claim folder, or click on the binoculars button located on the tool bar.

New claims are marked with a "#" sign in the left hand column of the grid. New claims will remain in the new status until all coding has been processed.

To sort, point anywhere on the column you want to sort and right mouse click. Left click Ascending or Descending (or Exit if you do not want to sort on that column). Notice that the column selected will automatically move to the left hand side of the grid.

Clearview® Guidelines

Individual Claim Lookup
Section 2.1 – Lookup Individual Claim

In order to view information on a particular claim in the Claim Search grid, click once on that claim and then double click on the desired subfolder under Individual Claims in the Clearview Functions list.

You can filter the claims in the search grid by using the Search feature. Only the claims that meet the search criteria will show in the grid, print, and export. Click on List All to clear your filter selection and get a complete list of claims.

To print or export your claim list, click on the More... button, then select the function you wish from the Report pop-up window. See Appendix 2 for information on printing.

Note: The date that prints on your list reflects the print date, not the valuation date of your data.

To export the list, click on More…, then Export. Select the type of File by clicking on the drop down arrow. The default file type is Excel. An export may take longer if you have a large file.

Enter or Select a Filename. Click the down arrow to select a file name already created. If you enter a new file name, begin with an alpha character and limit the rest of the name to alpha or alpha-numeric characters. No other characters or spaces may be used. For the best results, keep the name short and simple.

The "Data has been exported" pop-up box notifies you when your file has been successfully created in your export directory. To transfer the file to your computer, see Section 3.5 for instructions on File Transfer.

Click OK, then Cancel the Export window and Close the Report window.
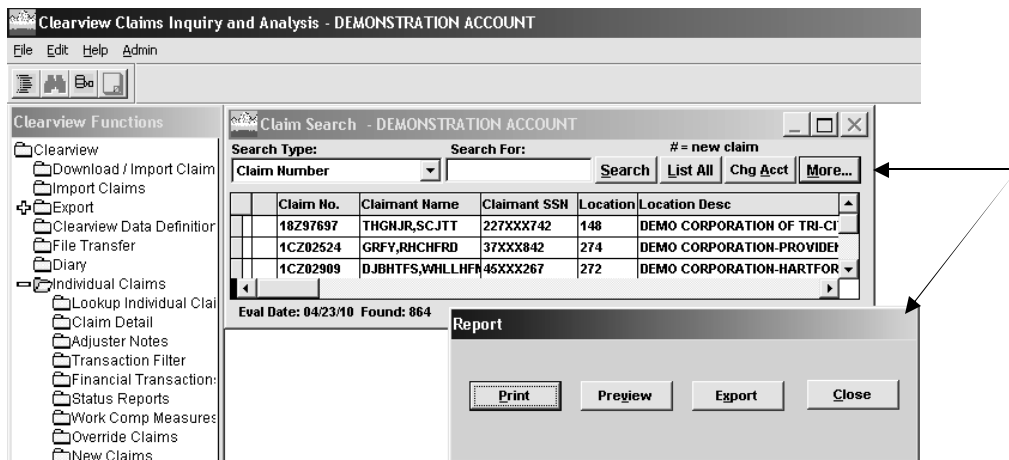
For information on the fields found in this window, see Clearview Data Definitions/Appendix 3

Clearview® Guidelines

Individual Claim Lookup
Section 2.2 – Claim Detail

Claim Detail displays detailed loss and financial information for a specified claim. Information in the top area of the screen is at accident level. The information in the scrollable area is at suffix level.

Click on a claim in the Claim Search grid, then double click Claim Detail from the list of Clearview Functions. Another option is to double click the claim on the Claim Search grid.

Click the down arrow under Suffix to view the claim suffixes and the information specific to that suffix.

Click the down arrow to view categories under Suffix Information.

Claim Detail information may be printed. If "All" is selected under Suffix Information, all information for the claim will print. If one of the other categories is selected, only information for that category will print.

See Appendix 2 for information on printing. For information on the fields found in this window, see Clearview Data Definitions/Appendix 3.

You can access the Transaction Filter by clicking on the Transaction Filter button. For more information on this function, see Section 2.4.

Clearview® Guidelines

Individual Claim Lookup
Section 2.3 – Adjuster Notes

Adjuster Notes: Click a claim in the Claim Search grid, then double click the Adjuster Notes folder under Clearview Functions.

The Adjuster Notes screen provides various ways to view and select notes by utilizing Display Order, Entry Date/Time or Topics/Keywords.

Note: Adjuster Notes are real time information. The system updates every 10 minutes.

You can filter notes' date ranges by clicking the Filter button and then selecting a range or inputting a start and end date of your choice. Click OK to process.

Clearview® Guidelines

Individual Claim Lookup
Section 2.3 – Adjuster Notes

Another option is to click Select Specific Notes to view notes for a particular claimant, activity type and/or date.   Click OK. To reset to all notes, select "All" under Activity Type.

Clearview® Guidelines

Individual Claim Lookup
Section 2.3 – Adjuster Notes

Click the forward and reverse arrows to scroll through notes. The Browse button allows you to view all notes in one sequential list, rather than one at a time.

Click here to access the Transaction Filter. For more information on this function, see Section 2.4.

Work Comp Measures is populated by adjusters when specified in the Special Claim Handling Instructions. See Section 2.7 for more information on this feature.

All notes will print unless you have selected a specified string via Topics/Keywords, Search, or Filter, then only that subset of the notes will print.

See previous pages for instructions on filtering notes

Clearview® Guidelines

Individual Claim Lookup
Section 2.4 – Transaction Filter

Transaction Filter provides payee information and the ability to view and filter on specific transaction types and claimants associated with a claim.

Note: Transaction Filter data updates nightly.

Click on a claim in the Claim Search grid. Double click on NEW-Transaction Filter.
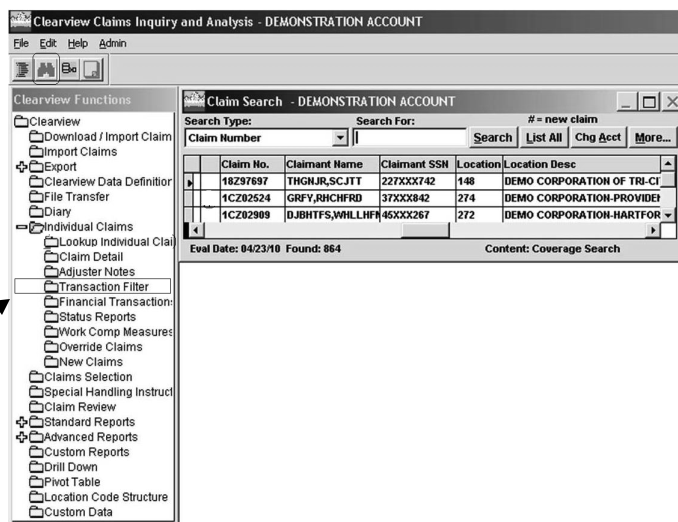
The Claim Payment Filter window will open. You can view summary information on the claim by clicking on the choices in the menu bar.
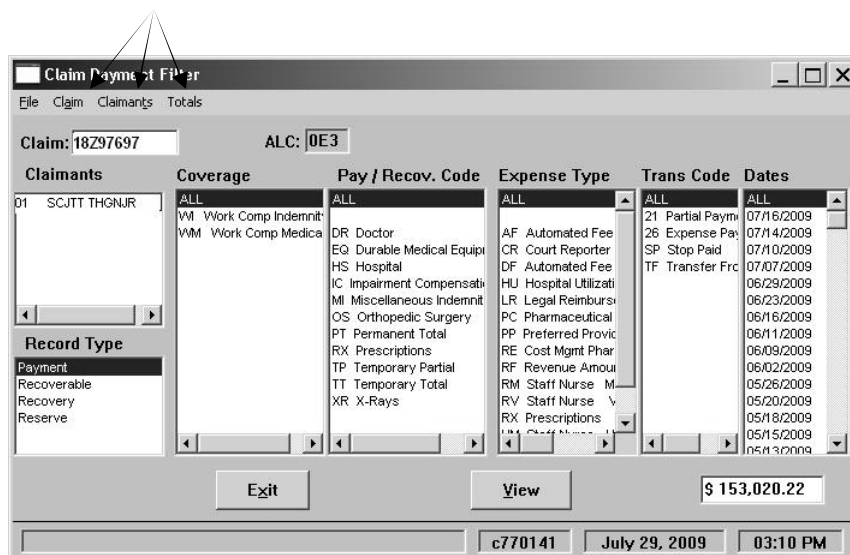
Clearview® Guidelines

Individual Claim Lookup
Section 2.4 – Transaction Filter

You can view all transactions or just certain ones by clicking on items in the various columns and then clicking on the View button.
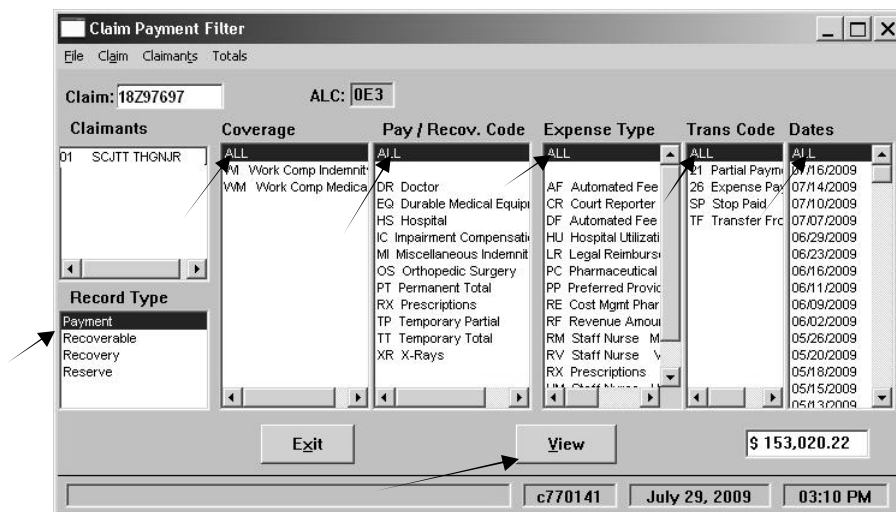
A Claim Payment Browser window will open. You can print the transactions by clicking on File in the menu bar, then Print Claims Listing. You can also use the items in the menu bar to change the sort order, search for specific items, group the transactions, add or remove columns, view summary information on the claim and view benefit totals.
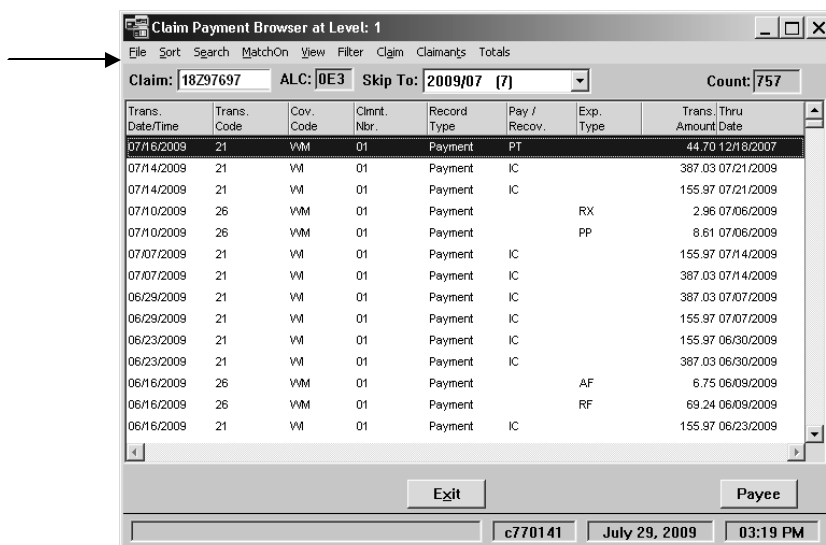
Clearview® Guidelines

Individual Claim Lookup
Section 2.4 – Transaction Filter

To view Payee information on a specific transaction, click on the transaction line and then click on the Payee button.

A Claim Payment Payee Information window will open. The Sort dropdown enables different display views of the Payee data.

Click on Exit to close the window.

Clearview® Guidelines

Individual Claim Lookup
Section 2.4 – Transaction Filter

To view benefit totals, click on Totals in the menu bar, then Benefit Amounts.

A Benefit Totals window will open.

Click on Exit to close the windows.

Clearview® Guidelines

Individual Claim Lookup
Section 2.5 – Financial Transactions

Financial Transactions allows you to view or print claim payment information such as payment issued date, payee and draft number. Click on a claim in the Claim Search grid, then double click Financial Transactions in the Clearview Functions list.

Note: Financial Transactions in this view are real time information. The system updates every 10 minutes.

A limited number of transactions (reserve changes and the most current payments) are displayed. If you need to view older transactions, refer to Section 2.4-Transaction Filter.

If a claim has multiple claimants, a drop down arrow can be found next to the claimant name. To view payments for other claimants, click the drop down arrow by the claimant's name and select another claimant. Double click on the newly selected claimant in order to view transactions for that claimant.

Clearview® Guidelines

Individual Claim Lookup
Section 2.5 – Financial Transactions

The financial transactions that you can view on the screen are printable. Click Print. The Print pop-up box appears and provides the option to print the List of Payments and/or the Totals, which will provide only financial information. You have the choice to print transactions for all payees, if applicable, or the current payee (the one whose transactions are currently on the screen).

Make your selection(s) and click Print.

Note: Financial transactions will only print directly to your default printer. Refer to Printing (Appendix 2) for instructions on changing your default printer. If you need to print older transactions, refer to Section 2.4-Transaction Filter.
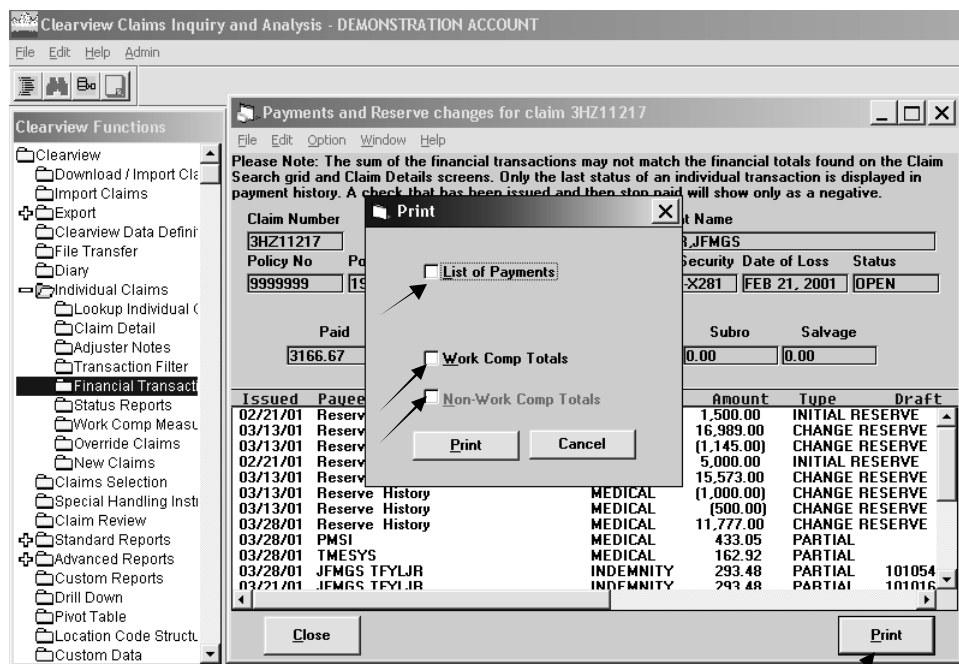
Clearview® Guidelines

Individual Claim Lookup
Section 2.6 – Status Reports

Status Reports are created by the adjuster based on your Special Claim Handling Instructions. Click on a claim in the Claim Search grid, then double click Status Reports in the Clearview Functions list.

Note: This function may take longer to open. Please be patient.

The Select Report pop-up box shown below appears only if a Status Report has been prepared and approved. Select the most recent report and click Open.

If a Status Report has not been created, a pop-up box appears indicating "There are NO approved reports for Claim: [claim number]".
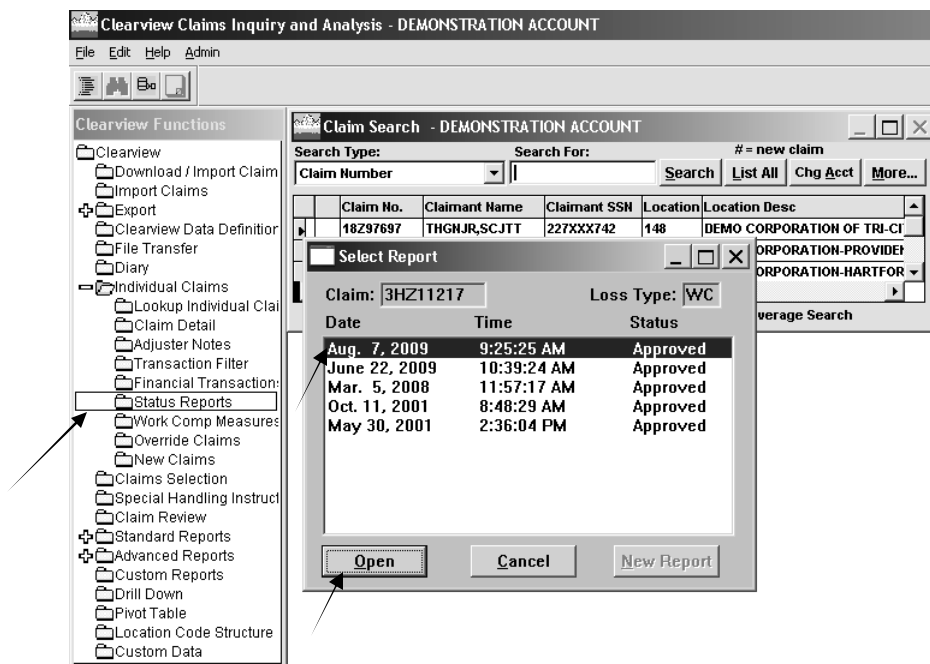
Clearview® Guidelines

Individual Claim Lookup
Section 2.6 – Status Reports

Select a category in the Title box and click Open.

Workers' Compensation Status Report

File Selection Order Colors Claim Claimants

Claim Number: 3HZ11217	ALC: 999
Policy Holder: DEMO CORPORATION	
Doing Business As: DEMO CORPORATION	
Location Address: 6805 W. RJFD STRGGT	
City, State, Zip: ELIZABETHTOWN, NC 28337	

Date Initiated: Oct. 11, 2001
Report As Of: Oct. 11, 2001

☑ Approved

Employee: TFYLJR, JFMYS E	Date of Birth: Aug. 5, 1957
Social Security #: XXX-XX-X281	Date of Hire: Jan. 3, 2000
Policy Number: 189XXX783	Date of Loss: Feb. 21, 2001
Location Code: 205	Date CNA Notified: Feb. 21, 2001
Teamworks Indicator: N	Date Employer Notified: Feb. 21, 2001

- Required
- ✓ Updated

Title
- ✓ Financial Summary:
- ✓ Case Estimate:
- ✓ Description of Loss:
- ✓ Nature of Injury:
- ✓ Investigation / Compensability:

Open...

Click the Next button to view the next category.

Workers' Compensation Financial Summary:

Claim Number: 3HZ11217   As of: Oct. 11, 2001   Date Initiated: Oct. 11, 2001

Loss Coverage	Pending Current Reserve Estimate *	Total Paid Loss *	Total Paid plus Pending Current Reserve / Estimate*	Total Paid Expenses	SI Fund / Supplemental Benefits*
Indemnity	$ 7,675	$ 9,685	$ 17,360	$ 0	$ 0
Medical	$ 3,544	$ 28,811	$ 32,355	$ 874	$ 0
Total	$ 11,219	$ 38,496	$ 49,715	$ 874	$ 0
Emp Liab.	$ 0	$ 0	$ 0	$ 0	$ 0

Exit   Prev Next

* Rounded to the nearest whole dollar.

Clearview® Guidelines

Individual Claim Lookup
Section 2.6 – Status Reports

Click File, Select Report, to choose a Status Report created on another date/time.

Click File, Browse, to view all categories for the status report in one screen. You can also print reports.

Additional information on the claim can be viewed by clicking on Claim or Claimants in the toolbar.

To exit Status Reports, click File, Exit.

See Appendix 2 for information on printing.

Clearview® Guidelines

Individual Claim Lookup
Section 2.7 – Work Comp Measures

Work Comp Measures entered by the adjuster are available in Clearview. To view Work Comp Measures, click on a claim number in the Claim Search grid and double click the Work Comp Measures folder. Click on the Loss button to access additional date-related information.

You can also access Work Comp Measures by double clicking on the Adjuster Notes folder and then selecting the Work Comp Measures tab as shown below.

Clearview® Guidelines

Individual Claim Lookup
Section 2.8 – Override Claims

Override Claims enables you to view an individual claim's transactions, Adjuster Notes and Status Reports. If you have access to more than one account, this function can be used to search for claims on **any** account. Double click Override Claims in the Clearview Functions list.

The Enter an Override Claim Number pop-up box appears. Type in a claim number, then select Transaction Filter, Adjuster Notes, or Status Reports by clicking on the appropriate button.

Note: Transaction Filter, Adjuster Notes and Status Reports work the same as previously described in Sections 2.3 through 2.6.
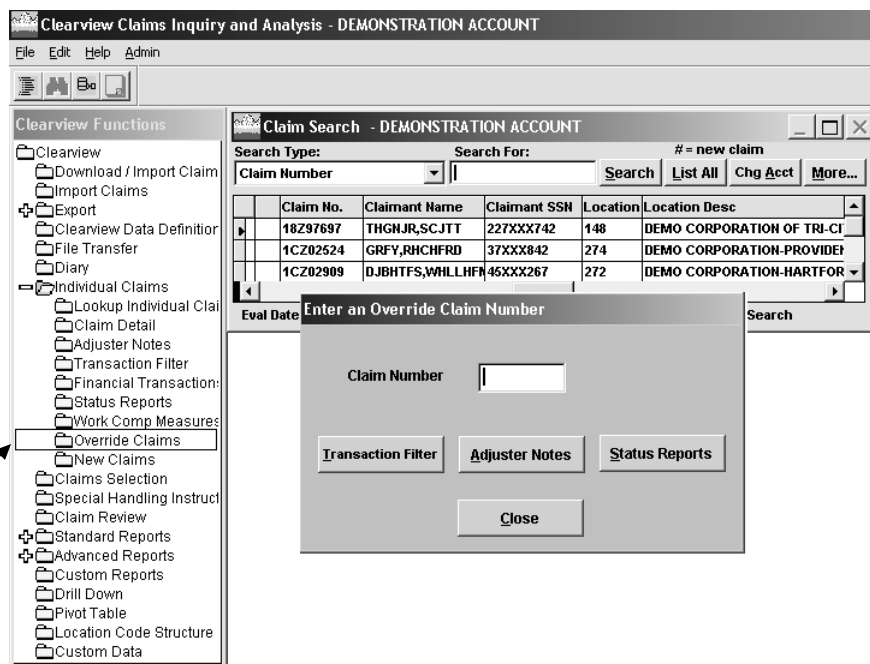
Clearview® Guidelines

Individual Claim Lookup
Section 2.9 – New Claims

New Claims displays a list of claims that have not yet gone through coding. These claims are available in the New Claims screen, the Claim Search grid (where they are identified by a "#" sign), and if included in the download, in reports and exports. Since these claims are new, only the Financial Transactions and Adjuster Notes are available for viewing from the Claim Search grid or New Claims screen. You can right click on any column to sort in ascending or descending order. **Note: New Claims are listed by Claimant/Coverage (suffix level), not by accident.**
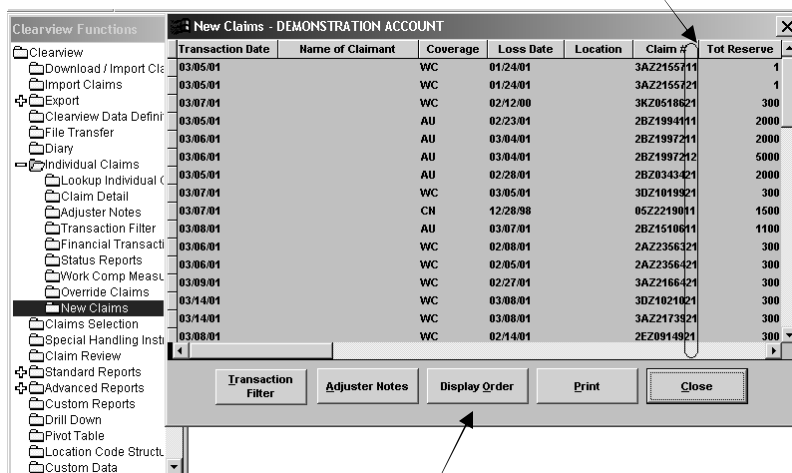
For more advanced sorting, click on Display Order. A pop up box will appear. Double click on each field on which you wish to sort to move it to the Selected box on the right or click on the field and click on the top arrow to move it to the right. Within the Selected box, you can change the order of the sort by clicking and dragging the button to the left of the item up or down. You can also change the direction of the sort (ascending or descending) by double clicking on the field name in the Selected box.
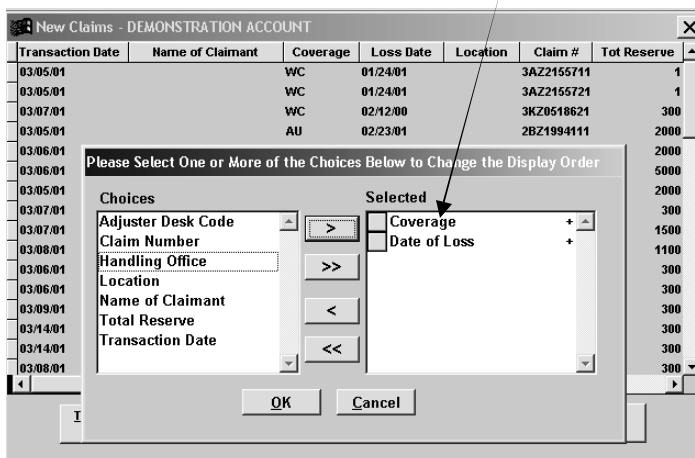
See Appendix 2 for information on printing.

Clearview® Guidelines

Report Information
Section 3.1 – Download/Import Claims

Download/Import Claims allows you to refresh data in Clearview.   It is not necessary to perform a new download if you are reviewing information on individual claims (for example, adjuster notes, status reports, claim payments). However, when producing reports or exporting, a new download should be performed for up to date reporting. A Clearview update schedule is available on the Risk Management Advantage® portal under Month End Schedule.

Be sure to delete downloads you no longer need to conserve space for future downloads. See Section 3.2 for further information on deleting downloads.

Double click on Download/Import Claims in the Clearview Functions list.
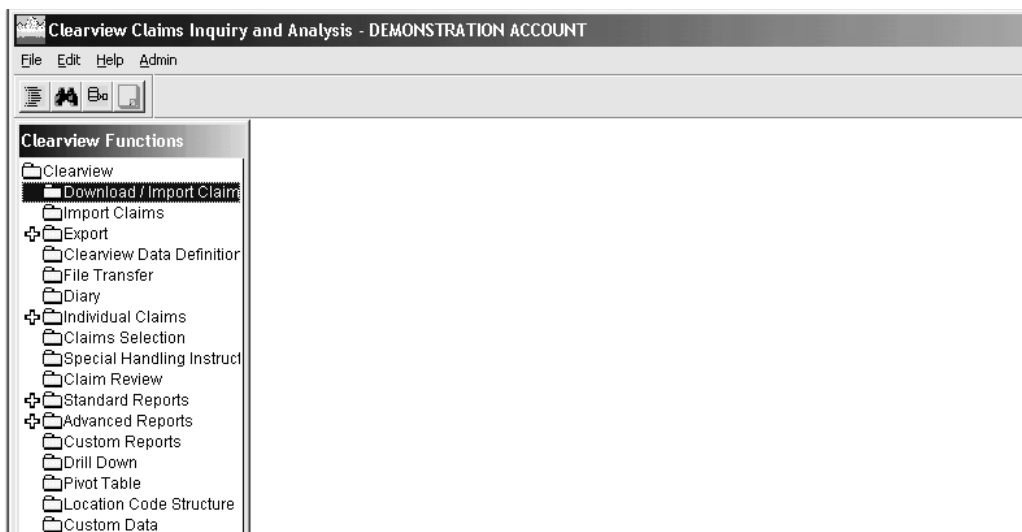
Clearview® Guidelines

Report Information
Section 3.1 – Download/Import Claims

The Request Status screen appears. This screen provides a log of the download/imports that have been processed.

You can import a previous download (to run reports using that valuation date) by selecting that file in the Request Status screen and clicking on the Import button or by double clicking on Import Claims in Clearview Functions. See Section 3.2 for more information on using the Import Claims function.

To submit a new download request, click the New button.

Account Name	Status	File Name	Submit Date	Row Count
DEMONSTRATION ACCOUNT	Imported	DemoAcct.dat	01/07/2002	217

Accounts

Description

New   Delete   Import   Close

Clearview® Guidelines

Report Information
Section 3.1 – Download/Import Claims

The New Download Request pop-up box appears.

Double click an account under Accounts Available or click an account and click the right arrow to move the account to Accounts Selected.

You can also Download Claims for **multiple accounts** if applicable. When multiple accounts are selected, they will be merged into one download/import file with a name you specify. This will result in the ability to perform consolidated analysis across your entire loss experience, not just account by account.

If more than one account has been selected for download, highlight one to select as the dominant account and press the Dominant Account button. This will direct which account's location structure will be applied in reports and exports. This can result in some claims appearing in the "Undefined" location category.

Note: If multiple accounts are selected for combined download, only the dominant account's data will be included in Advanced Reports. Using a multiple account download is not recommended for Advanced Reports.

Clearview® Guidelines

Report Information
Section 3.1 – Download/Import Claims

You can choose to include other Claim Types in your download. Double click a claim type under Claim Types Available or click on the claim type and click the right arrow to move the account to Claim Types Selected. See Appendix 1 for explanation of claim types.

The default Claim Status is Open and Closed Claims. You can also elect to download only Open or only Closed claims in the Claim Status box.

Note: If you select Open & Closed claims, you still have the option in Claims Selection to use only open or only closed claims for reporting purposes.

A Description of the data set may be entered but is not required.

Type a file name under Save As. Use alpha, alpha-numeric or numeric characters. No other characters or spaces may be used. Limit file name to 25 characters or less. Skip this step if you are using the Point in Time download feature.

Click Submit button to initiate download.

If you wish to use data valued as of a previous point in time in your reports, you can use the Point in Time feature. Click on the drop-down arrow next to Point in Time and choose the year/month valuation that you would like to use. This feature goes back to January 2007. Follow the above steps, but do skip the Save As step.

Clearview® Guidelines

Report Information
Section 3.1 – Download/Import Claims

The Request Status pop-up box appears. The Status column will be updated to show you the processing stage. When the download is complete, the Status column will display "Importing".
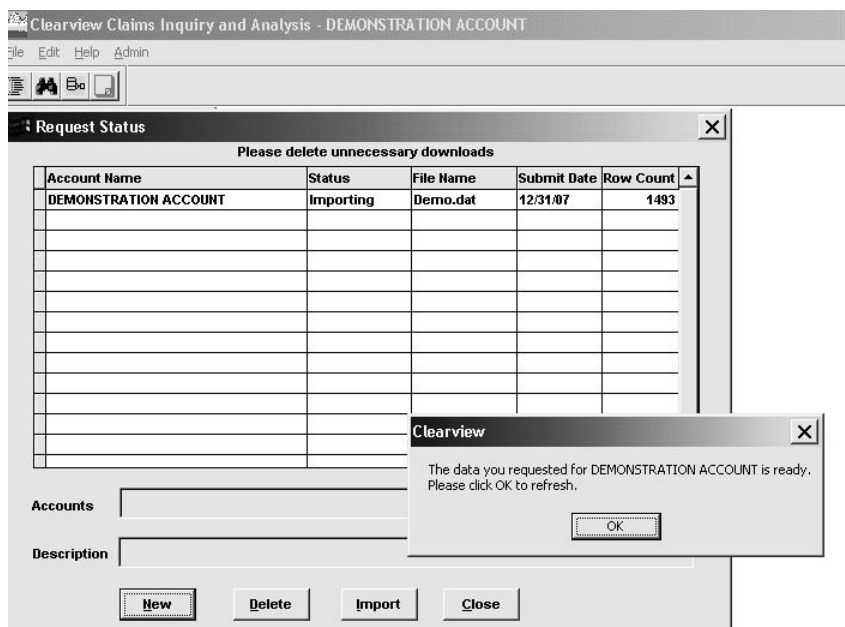
A pop-up box appears to indicate that loss information for the selected account is ready and you will be prompted to refresh your data. Click OK.

Note: You will be returned to the main Clearview Claims Inquiry and Analysis screen with the most recently evaluated data. Claim information can now be exported and reports, graphs and pivot tables can be created.

Clearview® Guidelines

Report Information
Section 3.2 – Import Claims

Import Claims allows you to refresh your download dataset utilizing files previously downloaded. Double click on the Import Claims folder. Highlight a file from the list displayed and either click the OK button or double click on the selected file. The data will automatically be loaded into the Claim Review grid and can be used in an export or to create reports, graphs and pivot tables.

You can delete the prior downloads on this screen by highlighting the specific download and clicking the Delete button. This provides good housekeeping of files that will not be used in the future.
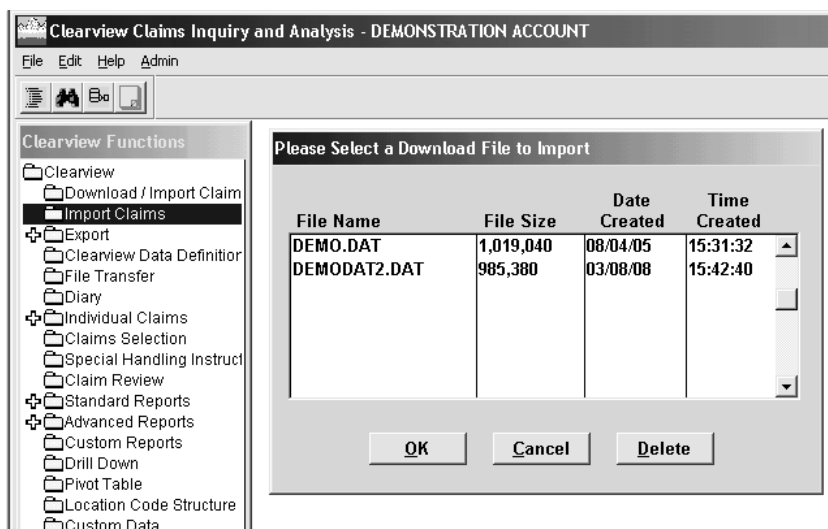
Clearview® Guidelines

Report Information
Section 3.3 – Export Claims

Export Claims provides the capability to copy the claim data currently in the download dataset to a user selected file type. Click the "+" sign next to Export to view the subset folders. Double click the Export Claims folder.

The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Yes, or click No to retain the current download. If you do not want this pop-up box to appear, click the box next to "Do not display this message again." See Section 3.1 for information on downloading.
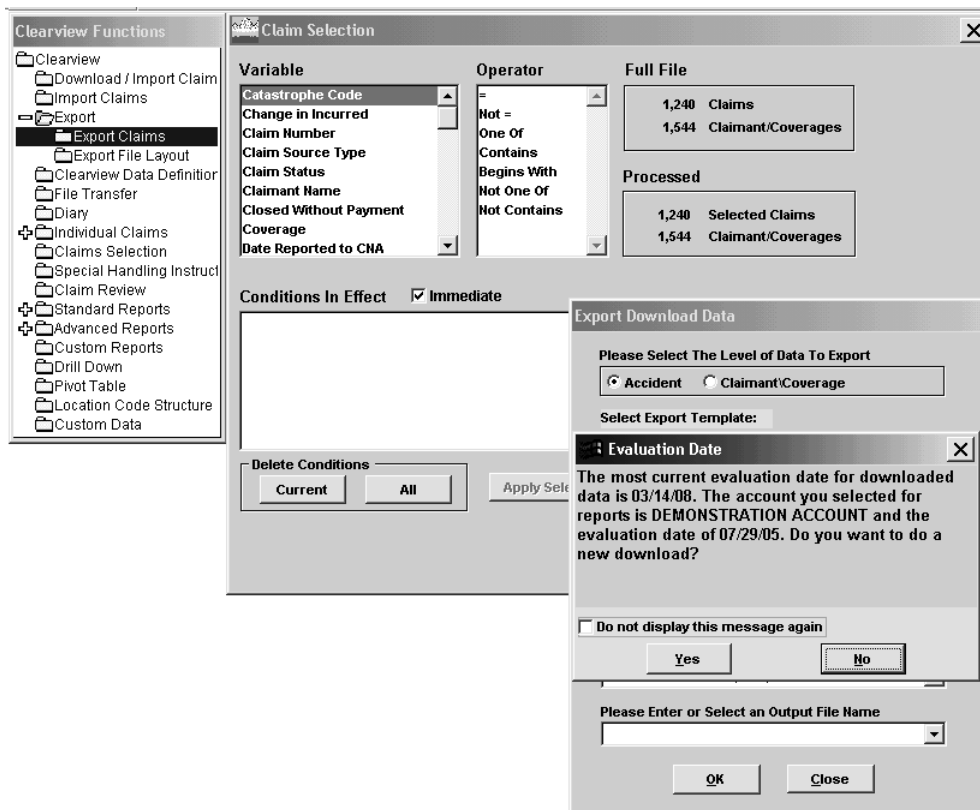
The Claim Selection pop-up box (partially shown above) may appear to remind you of any selections you may have in place. You may keep, delete or change current conditions. Click close when finished. See Section 3.6 for instructions on using Claims Selection.

Clearview® Guidelines

Report Information
Section 3.3 – Export Claims

The Export Download Data pop-up box appears.

Choose the Level of Data to Export, either Accident or Claimant/Coverage. If you want all data fields, click on "All Fields" in the Select Export Template box.

To create your customized template, click the New button. The Field Selection for Export window will appear.

See Appendix 1 for more information on Accidents vs. Claimant/Coverage.

Clearview® Guidelines

Report Information
Section 3.3 – Export Claims

To select specific columns for your export, double click on each desired element in the Choices box, or click on each element and then click on the ">" button to move it to Fields to Include in Export.

Field Selection for Export

By default, ALL data columns are exported. To select specific columns, make your choices by clicking on each desired element in the 'Choices' box, then clicking on the '>' button. Click 'OK' when done with selection.

Choices		Fields to Include in Export
Social Security No.	>	Adjuster Email
State		Adjuster First Name
Subrogation Indicator		Adjuster Last Name
Suplemental Indicator	>>	Adjuster Phone
TT,PT Payment		Claim Number
Time of Day		Claim Status
Total Salvage	<	Total Expense
Total Subrogation		Total Incurred
Tracking Indicator		Total Paid
Type of Loss	<<	Total Reserve
Type of Loss - Code Only		

Template Name: EXAMPLE TEMPLATE

OK   Cancel

Once your field selections are complete, highlight and delete the default title in the Template Name field. Rename the template to a name that is meaningful to you.

Click OK when done with selection. A pop-up box will appear, asking if you want to save the selection as a template. Click Yes.

You can create as many templates as you wish, which can be used with other data selections in current or future sessions.

See Appendix 1 for more information on fields in the Export function.

Clearview® Guidelines

Report Information
Section 3.3 – Export Claims

After clicking on the OK button, the screen will return to the Export Download Data box. The new template is listed.

If you wish to change a template, highlight the template you want to change and click on the Edit button; make the desired changes and click on OK. A pop-up box will appear, asking if you want to save the selection as a template. Click Yes.

Clearview® Guidelines

Select the type of File by clicking on the drop down arrow. The default file type is Excel.

Enter or Select an Output File Name. Click the down arrow to select a file name already created. If you enter a new file name, begin with an alpha character and limit the rest of the name to alpha or alpha-numeric characters. No other characters or spaces may be used. For the best results, keep the name short and simple.

An export may take longer if you have a large file.

The Export Successful pop-up box notifies you when your file has been successfully created in your export directory. To transfer the file to your computer, see Section 3.5 for instructions on File Transfer.

Click OK.

Clearview® Guidelines

Report Information
Section 3.4 – Export File Layout

Export File Layout contains links to access Export Layout information and Export Data Definitions. Click the "+" sign next to Export to see the subfolders.

Double click Export File Layout.

Click on the Export Data Definitions or Export Layout link.

To close the HTML Help window, click on the X in the upper right hand corner.
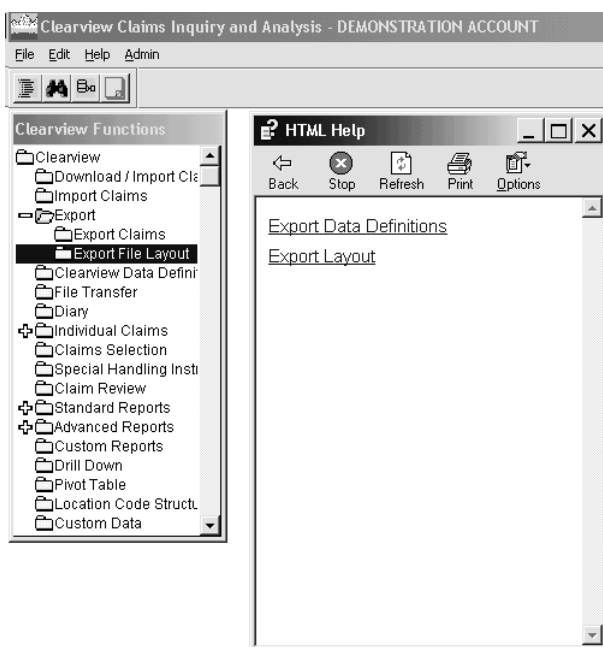
Clearview® Guidelines

Report Information
Section 3.5 – File Transfer

File Transfer allows you to transfer and rename your export and pdf files to your C: drive and to delete unnecessary transfer files. Double click File Transfer.
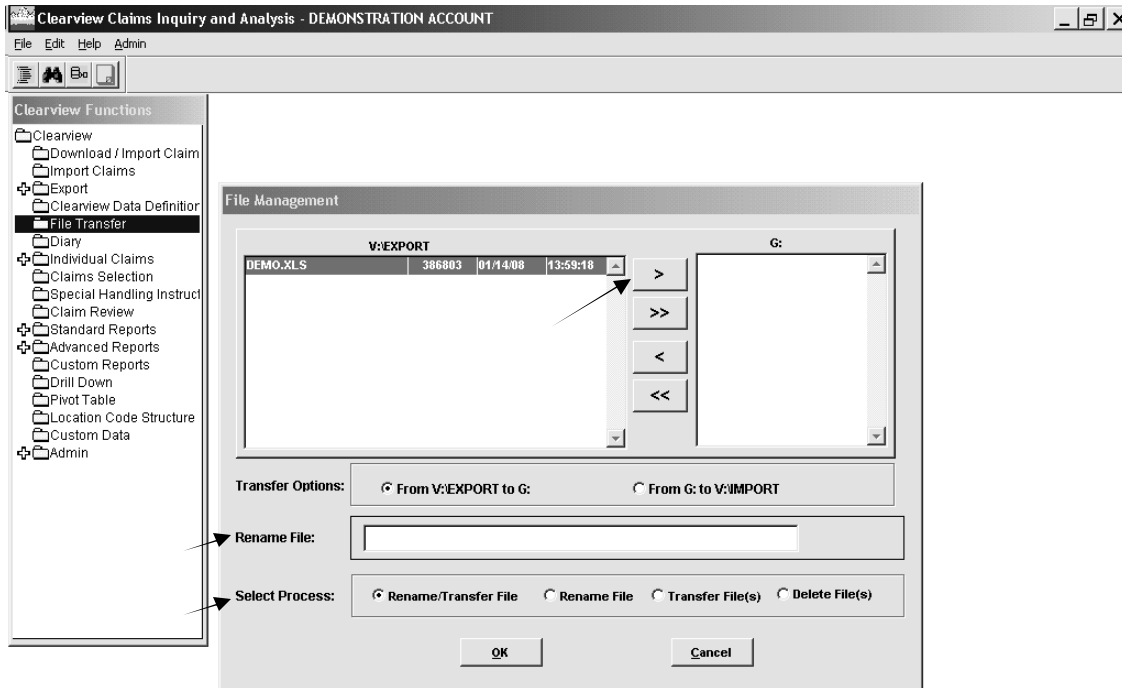
Double click the desired file under V:\EXPORT or click on the file and click the top arrow to move the file to G:. (Please note: G: is actually your C: drive.)

If you wish to rename your file, type the new name in the Rename File box. The name must begin with an alpha character and should be kept short and simple. You do not need to include the file extension (i.e., .pdf or .xls).

The Select Process options allow you to rename and transfer your file in a single click, to rename the file without transferring it to your computer, to transfer the file without renaming it, or to delete unwanted files.

Clearview® Guidelines

Report Information
Section 3.5 – File Transfer
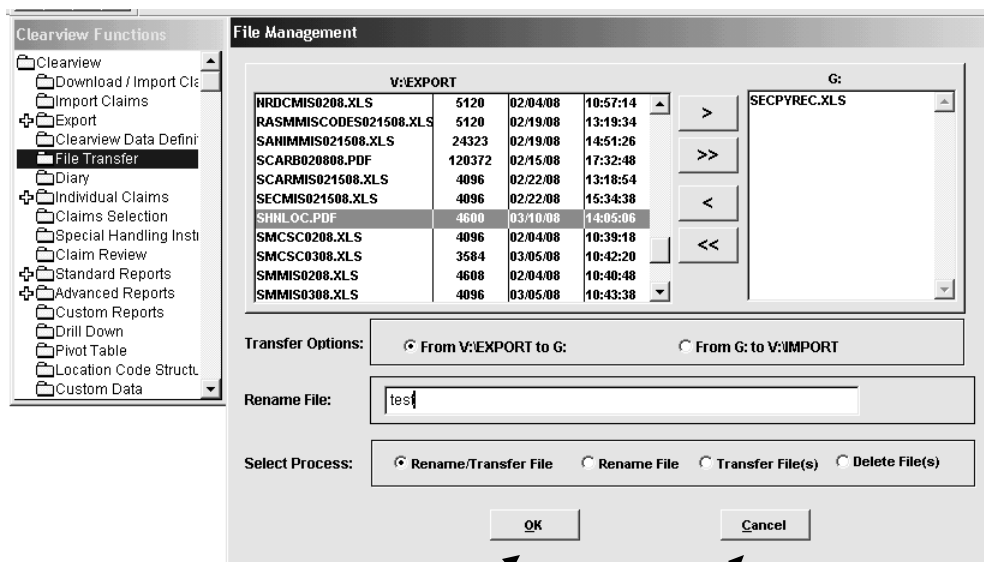
Click OK.

The File Transfer Completed pop-up box appears indicating that the selected file has been successfully transferred to your C: drive (the message will say G: drive). Click OK.

To exit File Transfer, click Cancel.

You will find the file on the root of C:

Note: If you are restricted from transferring files to your C: drive, contact Client Support (800-727-3071) for assistance.

Clearview® Guidelines

Report Information
Section 3.6 – Claims Selection

Claims Selection allows you to create a subset of claims. You can change the selection at any time by repeating this process. Double click Claims Selection.

To select more than one condition, click on the checkmark next to Immediate to remove it. When Immediate is not checked, all Conditions will be processed at once, saving time. When Immediate is checked, each Condition will be processed separately. The default is for Immediate to be checked.

Select a field from the Variable list by single clicking. Use the arrows to scroll through the list of variables. See Clearview Data Definitions/Appendix 3 for definitions of the variables.

Select an option under Operator by double clicking. A window will pop-up with a list of values for the variable. **The selections available under Operator will change based on the Variable you select.** Repeat this process until all conditions are selected.

Clearview® Guidelines

Report Information
Section 3.6 – Claims Selection

If the Immediate box is not checked, click the Apply Selection to process all your conditions at one time.

See Appendix 1 for more information on items that you see in this screen.

Notes:
Conditions selected in Claims Selection will not carry through to Advanced Reports. These reports have a Rollup tab where criteria can be defined.

The maximum number of Conditions in Effect that you can choose is 20.

The Conditions you have chosen will remain in your download for reporting and exporting analysis until you either complete a new download/import or return to the above Claim Selection menu and delete selected Conditions.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports

Standard Reports: Click the "+" sign next to Standard Reports to view available reports.

Single click on any report and a pop-up box will appear with a description of the report.
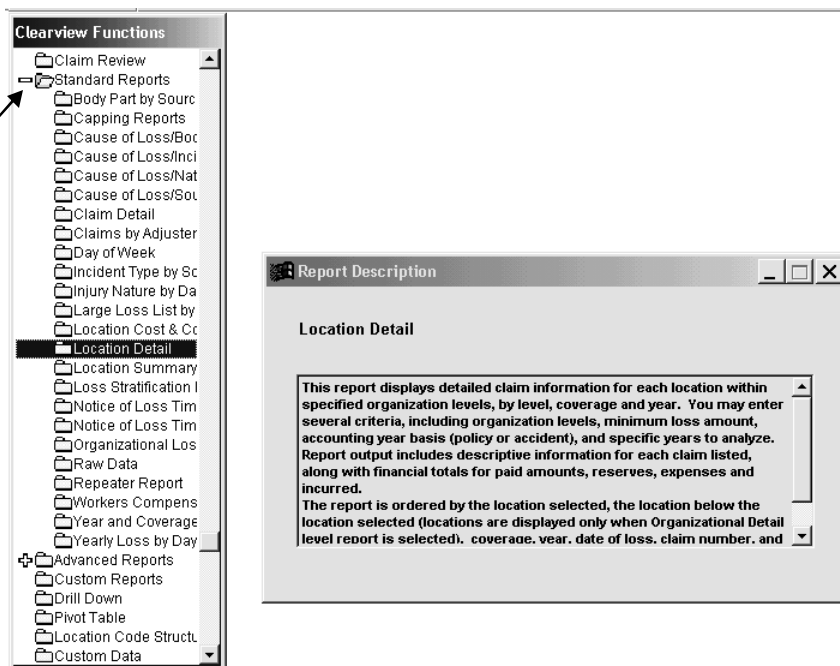
Double click on the report to run it.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports

The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Yes or click No to retain the current download. If you do not want this pop-up box to appear, click the box next to "Do not display this message again." See Section 3.1 for instructions on downloading.

The Claim Selection pop-up box (not shown) may appear to remind you of Conditions In Effect. See Section 3.6 for instructions on using Claims Selection. You may keep, delete or change Current Conditions. Click Close when finished.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports

Criteria for Standard Reports is defined by using this pop-up. Data can be filtered to pertain to specific Organizations, Coverages, Years or Incurred Amount limits. You can specify whether the report should include Organizational Detail or be at the Corporate Summary Level and whether the Accounting Basis should be applied by policy year or accident year (the Capping reports and Loss Stratification Reports will have a slightly different window).

Click the Compressed box to eliminate page breaks after each location. This will also save paper when printing.

If you have more than one level in your structure, click the down arrow under Organizational Level to select a different level. If you do not want the data broken down into the next lower level, click the Limit to Selected Org Level box. This feature is available only if you have selected Organization Detail under Report Type.

Click next to Incurred and enter a dollar amount if you want to view only claims greater than or equal to a certain amount.

Refer to Appendix 1 for more information on the choices available in this screen.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports

Click on any of the data elements under Organization(s), Coverage, and/or Year, and claim information will be retrieved based on your selection. In the example below, Location 10 has been selected along with WC coverage. If you would like to select more than one item from a list, hold down the Ctrl key while you click on the additional items, or the Shift key to select consecutive items from the same list.

If you would like to restore all of the claim data, right mouse-click on the data elements that you have selected. The Clear Selection option will appear. Left mouse-click on Clear Selection and the claim data will be restored.

For information on printing and/or previewing your report, see Appendix 2. For more information on the choices in this window, see Appendix 1.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports/Capping Reports

Capping Reports identify the impact on insurance and reinsurance costs at varying retention levels. It allows you to compare totals of claim loss amounts, limited to a loss amount you specify, with total unlimited claim loss amounts. Double click Capping Reports.

The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Ye" or click No to retain the current download. If you do not want this pop-up box to appear, click the box next to "Do not display this message again". For information on downloading, see Section 3.1.

The Claim Selection pop-up box may appear to remind you of Conditions In Effect (screen print not shown). You may keep, delete or change current conditions. Click Close when finished. See Section 3.6 for instructions on using Claims Selection.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports/Capping Reports

Criteria for Capping Reports is defined by using this pop-up screen.

If you have more than one level in your location structure, click the down arrow next to Organizational Level to select a different level. If you do not want the data broken down to the next lower level, click the box next to Limit to Selected Org. Level.
This feature is available only if you have selected Organization Detail under Report Type.

See Appendix 1 for information on the choices in this window.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports/Capping Reports

Enter the Limiting/Capping Amount that you would like to apply to the data. The resulting report will apply the limit to the Total Incurred.

Click on any of the data elements under Organization(s), Coverage, and/or Year, and claim information will be retrieved based on your selection. In the example below, Location 10 and Policy Year 2000 were selected. If you would like to select more than one item from a list, hold down the Ctrl key while you click on the additional items, or the Shift key to select consecutive items from the same list.

If you would like to restore all of the claim data, right mouse-click on the data elements that you have selected. The Clear Selection option will appear. Left mouse-click on Clear Selection and the claim data will be restored.

See Appendix 1 for more information on the choices in this window. For instructions on printing/previewing the report, refer to Appendix 2.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports/Loss Stratification Reports

Loss Stratification Reports provide the ability to view claim counts and dollars within claim loss size ranges.
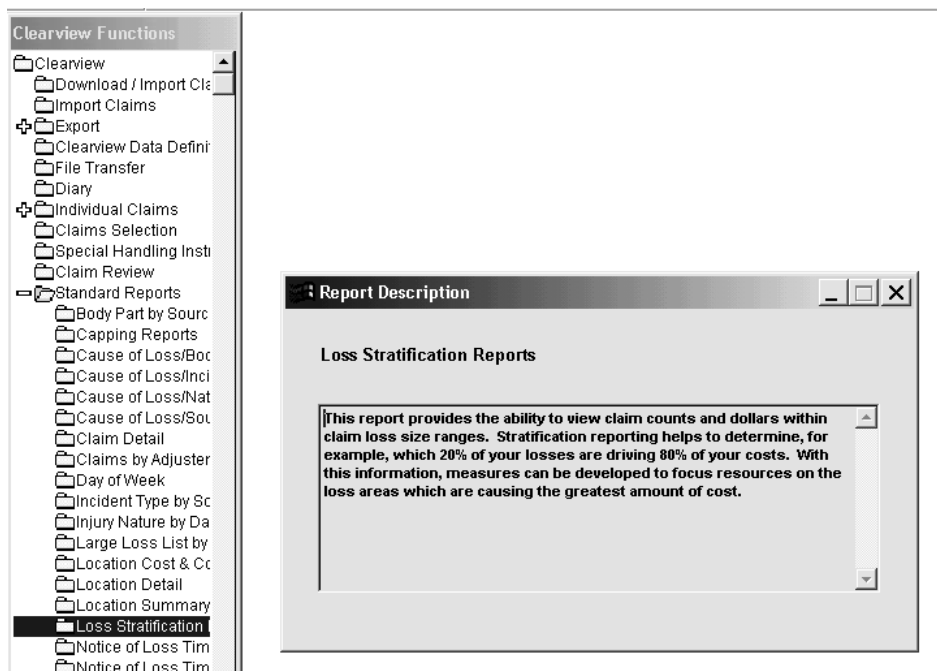
The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading (screen print not shown). You may perform a new download by clicking Yes or click No to retain the current download. Refer to Section 3.1 for instructions on downloading. If you do not want this pop-up box to appear, click the box next to Do not display this message again.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports/Loss Stratification Reports

The Claim Selection pop-up box may appear to remind you of Conditions In Effect. You may keep, delete or change current conditions. Click Close when finished. See Section 3.6 for instructions on using Claim Selection.

Criteria for Loss Stratification Reports is defined by using this pop-up screen.

If you have more than one level in your location structure, click the down arrow next to Organizational Level to select a different level. If you do not want the data broken down to the next lower level, click the box next to Limit to Selected Org. Level.   This feature is available only if you selected Organization Detail under Report Type.

See Appendix 1 for more information on the choices in this window.

Clearview® Guidelines

Report Information
Section 3.7 – Standard Reports/Loss Stratification Reports

Click on any of the data elements under Organization(s), Coverage, and/or Year, and claim information will be retrieved based on your selection. In the example below, WC coverage and Policy Year 2000 were selected. If you would like to select more than one item from a list, hold down the Ctrl key while you click on the additional items, or the Shift key to select consecutive items from the same list.

If you would like to restore all of the claim data, right mouse-click on the data elements that you have selected. The Clear Selection option will appear. Left mouse-click on Clear Selection and the claim data will be restored.

Enter up to seven stratification levels.

See Appendix 1 for more information on the choices in this window. For instructions on printing/previewing the report, refer to Appendix 2.

Note: When entering Stratification Levels, any incurred amount above the highest level entered will show on the report as Total Incurred Above Limit Specified.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports

Advanced Reports (Loss Development Triangles and Point in Time reports) provide the ability to create loss development triangles and complete comparative analysis from one period of time to another. Contact Client Support at 800-727-3071 if you would like assistance in using this function.

Click the "+" sign next to the Advanced Reports folder to view the subset folders. Double click on Loss Development Triangles or Point in Time reports to open them.

Notes:
1. The Advanced Reports function takes longer to open. Please be patient.
2. Conditions chosen in Claims Selection do not apply to Advanced Reports. These reports have a Rollup tab where criteria can be defined.
3. Data updates monthly. Even when using a prior download, the data displayed in these reports will be the most current available.
4. If using a combined download, only the Dominant Account data will appear in the report and the earliest claim date in Start Month/Yr is used.
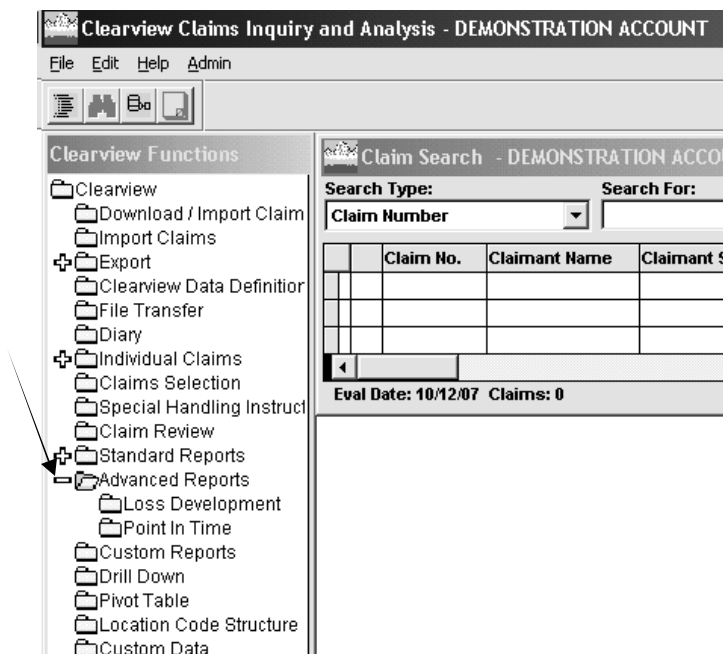
Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles

Loss Development Triangles provide a more accurate figure of actual loss liability and a clearer interpretation of underlying trends. Trending development of claim counts and costs can be produced by month, quarter and year.

Loss Development Triangles are defined by using the Content, Rollup and Layout tabs. The Content tab allows you to select various claim information.

See Appendix 1 for information on the choices available in this window. For more information on choices under Content Selection (Dollar), see Clearview Data Definitions/Appendix 3.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles

The Rollup tab allows you to select claim criteria to create Loss Development Triangles for each level within a set of roll-up criteria you define.

You can break out data in your report by double clicking a variable under Choices or clicking a variable and then clicking the top arrow to move the variable to Selected (top right). The values associated with that variable will appear in the Selected Level Value box on the lower left. Repeat for each desired item. Levels will appear in the order in which you select them.

If you want to limit criteria used in the report, double click an item under Selected Level Value or click an item and click the top arrow to move the item to Selected (lower right). Repeat for each desired item.

Selected Level Value will break out data by that criteria. Moving items to the lower Selected box will limit the data to include only the items (e.g., coverages) shown in this box.

See Clearview Data Definitions/Appendix 3 for more information on Choices in this window.

Click Layout tab.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles

The Layout tab gives you the option to determine how you would like your Loss Development Triangle to be displayed, either Present to Past or Past to Present. Select a type of layout and a sample of a report for the type you selected will be displayed at the bottom of the screen.
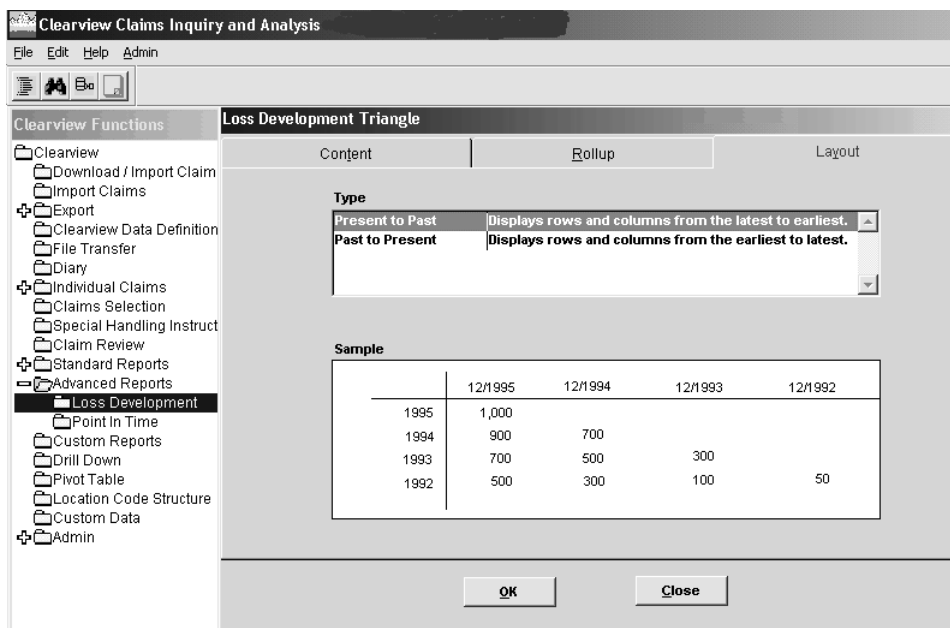
Click OK. A pop-up box may appear, indicating that it will take some time to process the historical data. Click Yes to continue.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles

If the triangle requested is on more than one page, this pop-up box will appear. Policy years will go across the top of the page instead of down the page if you choose to invert the report. Select Yes or No.
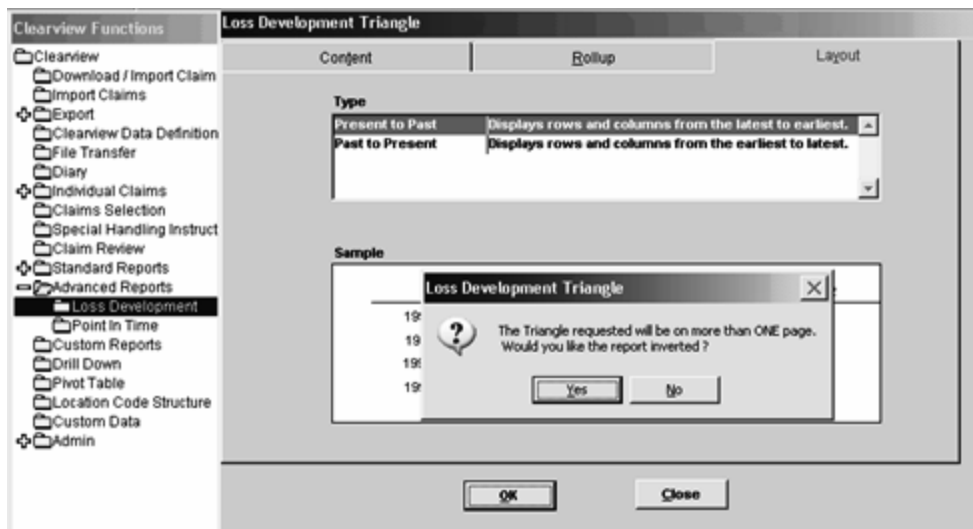
A Report pop-up box appears listing the types of triangle reports generated by your criteria. Highlight the one you would like to produce from the Type box and click on Print or Preview.

See Appendix 2 for information on printing and/or previewing.
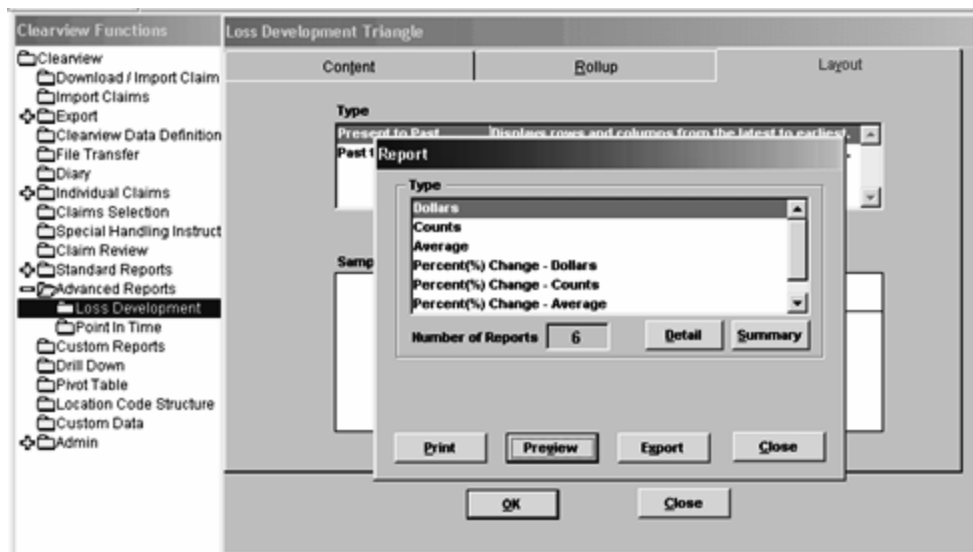
Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles

The Export function allows you to make your triangle data accessible from within other applications. Click Export.
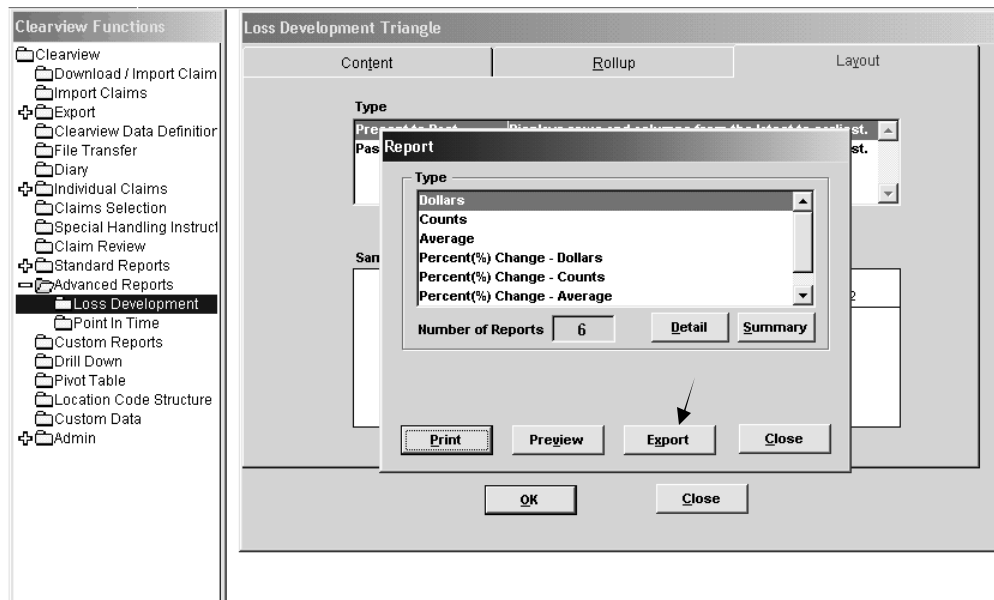
Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles
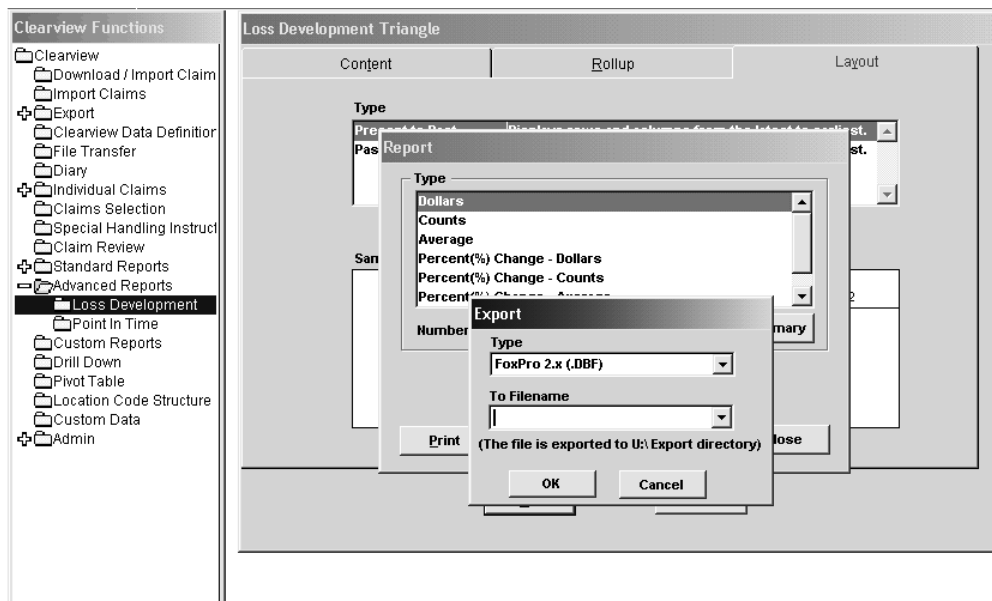
Select a file type.

Type a file name or select an output file name.

Click OK. Since this file is exported to the V:\Export Directory, you will have to move this file to your C: Drive by using the File Transfer function. Refer to Section 3.5 for instructions on using File Transfer.

The Export pop-up box appears indicating the data has been exported. Click OK. Click Cancel to exit the Export pop-up box.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles

For a listing of the losses that were included in the analysis for any individual cell in the Loss Development Triangle, click on the Detail button.
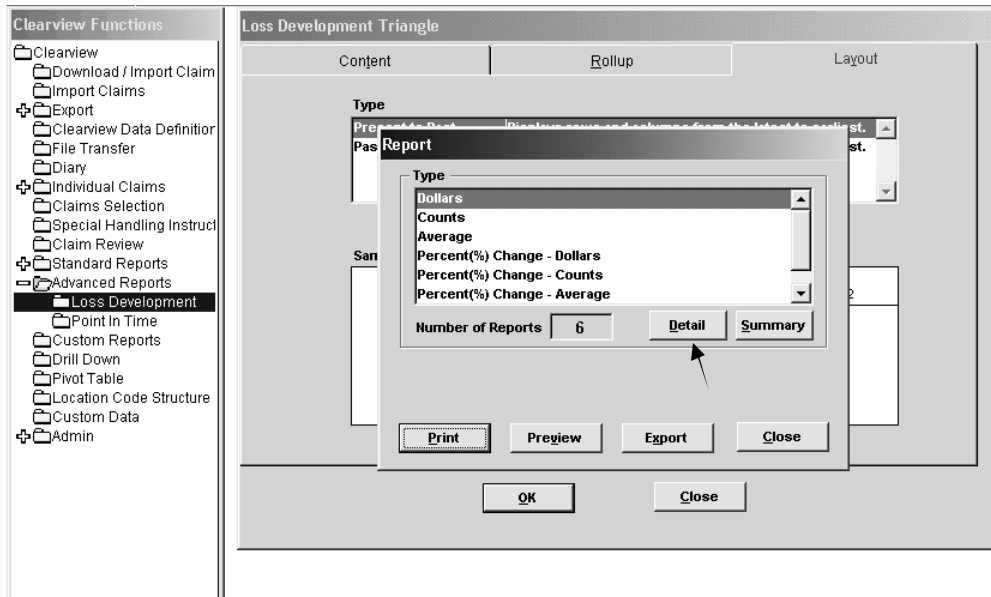
A pop-up box will appear that allows you to select a particular point in time in the Loss Development Triangle. Click on Print to produce a report that includes a Claim Number, Claim Status, Loss Date, Location, Count, and Dollar amount for each claim included in development time period you selected. Refer to Appendix 2 for assistance with printing.
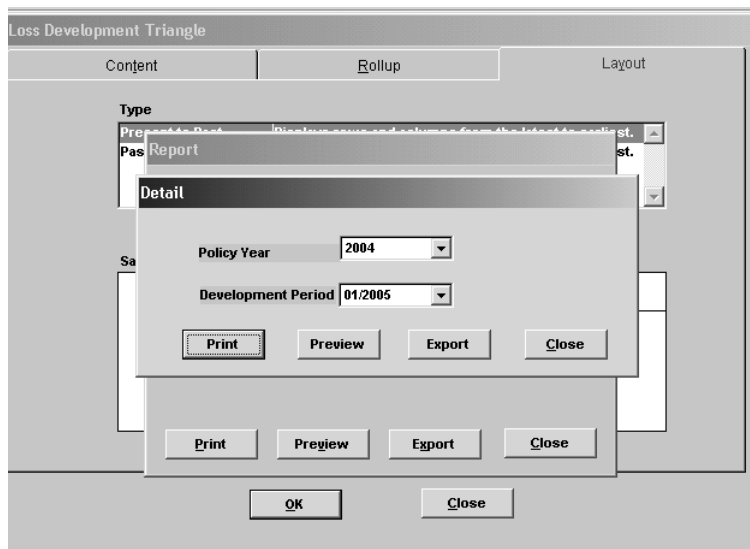
Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Loss Development Triangles
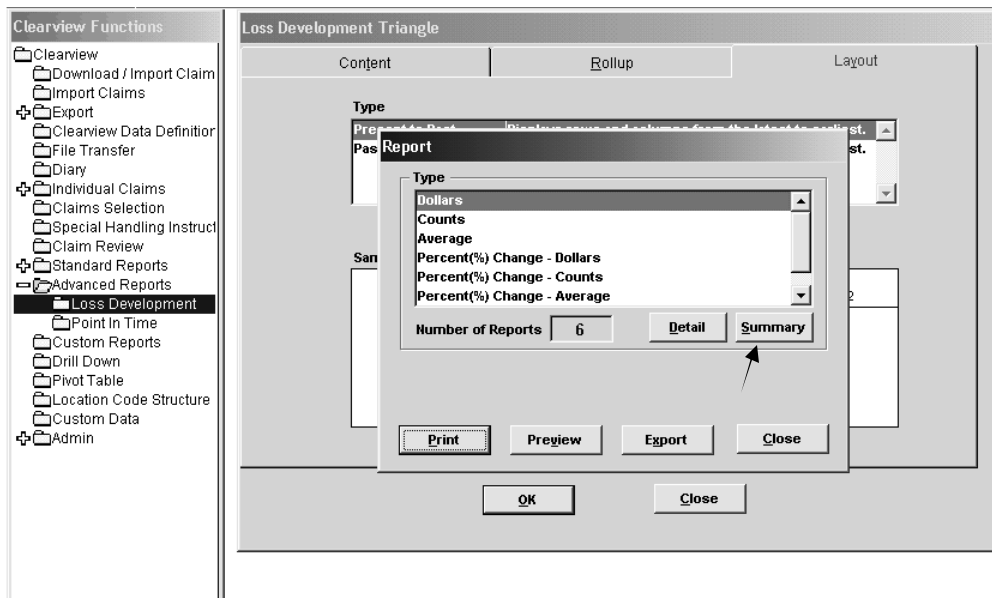
For a breakdown of Closed to Open losses, click on the Summary button. The report will tabulate the Count and Dollar amounts for Closed vs. Open claims for each selected cell of the Loss Development Triangle.
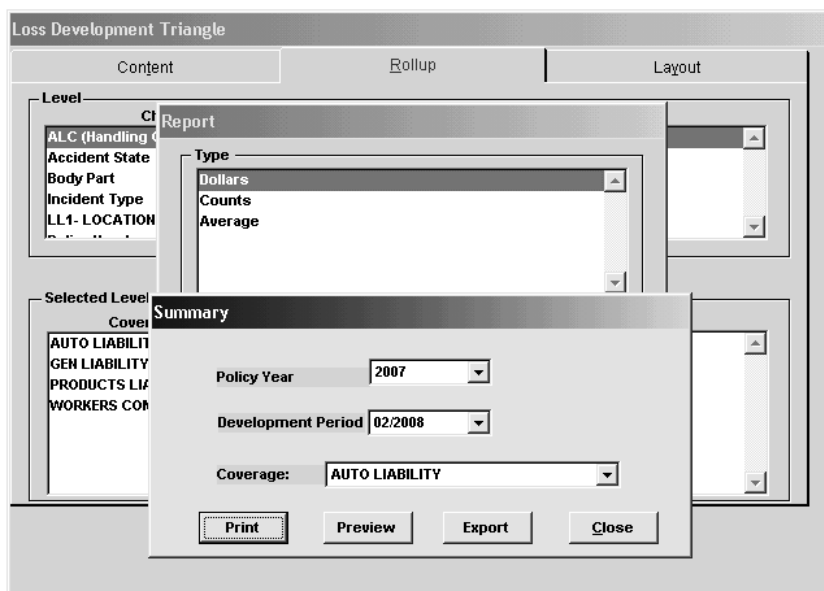
Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports

Point In Time reports allow you to analyze a vertical slice of comparable time periods. Double click Point In Time.

Point In Time reports are defined by using the Content, Rollup and Layout tabs. The Content tab allows you to select various claim information.

See Appendix 1 for more information on choices available in this window. Refer to Clearview Data Definitions/Appendix 3 for additional information.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports

The Rollup tab allows you to create a Point In Time report broken down by each level within a particular variable (e.g., select coverage from Choices and available values appear) and to limit the data in your report.

You can break out data in your report by double clicking a variable under Choices or clicking a variable and then clicking the top arrow to move the variable to Selected (top right). The values associated with that variable will appear in the Selected Level Value box on the lower left. Repeat for each desired item. Levels will appear in the order in which you select them.

If you want to limit criteria used in the report, double click an item under Selected Level Value or click an item and click the top arrow to move the item to Selected (lower right). Repeat for each desired item.

Selected Level Value will break out data by that criteria. Moving items to the lower Selected box will limit the data to include only the items (e.g., coverages) shown in this box.

See Clearview Data Definitions/Appendix 3 for more information on Choices in this window.

Click Layout tab to select your report layout.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports

The Layout tab gives you the option to determine how you would like your Point In Time report to be displayed, either Present to Past or Past to Present. Select a type of layout, and a sample of a report for the type you selected will be displayed at the bottom of the screen. Click OK.

A pop-up box may appear, indicating that it will take some time to process the historical data. Click Yes to continue.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports

A Report pop-up box appears listing the types of reports generated by your criteria. Highlight the type of report you would like to produce from the Type box and click on Print or Preview. See Appendix 2 for information on printing/previewing.
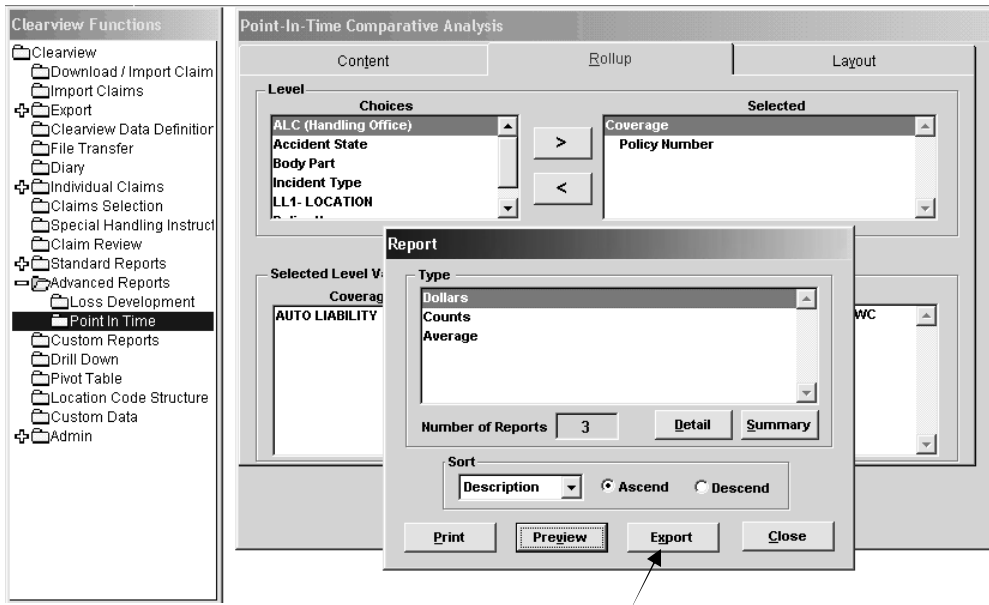
The Export button allows you to make your data accessible from within other applications. Click Export.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports
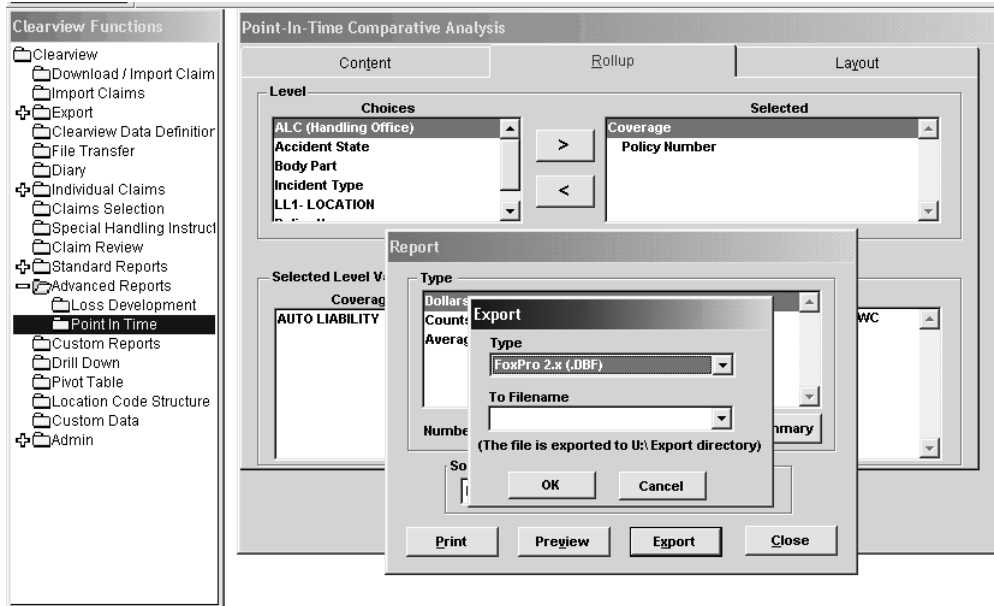
Select a file type.

Type a file name or select an output file name.

Click OK. Since this file is exported to the V:\Export Directory, you will have to move this file to your C: Drive by using the function File Transfer. Click OK. Refer to Section 3.5 for instructions on using File Transfer.

The Export pop-up box appears indicating the data has been exported. Click OK. Click Cancel to exit the Export pop-up box.

Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports

For a listing of the losses that were included in the analysis for each individual point in time, click on the Detail button.
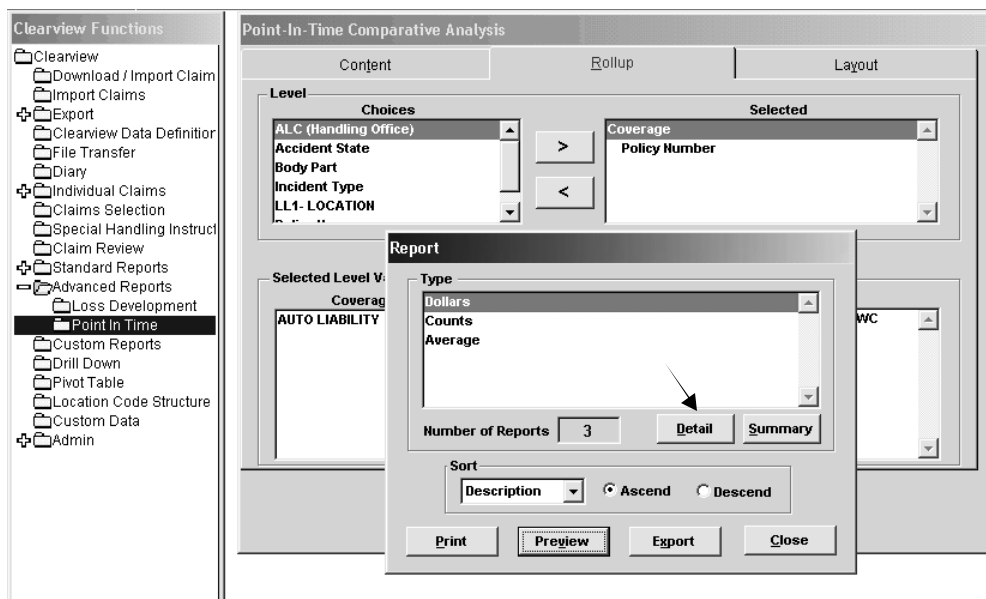
The pop-up box below shows you how you can select a particular point in time in the analysis. Click on Print to produce a report that includes a Claim Number, Claim Status, Loss Date, Location, Count, and Dollar amount for each claim included in the time period you selected.
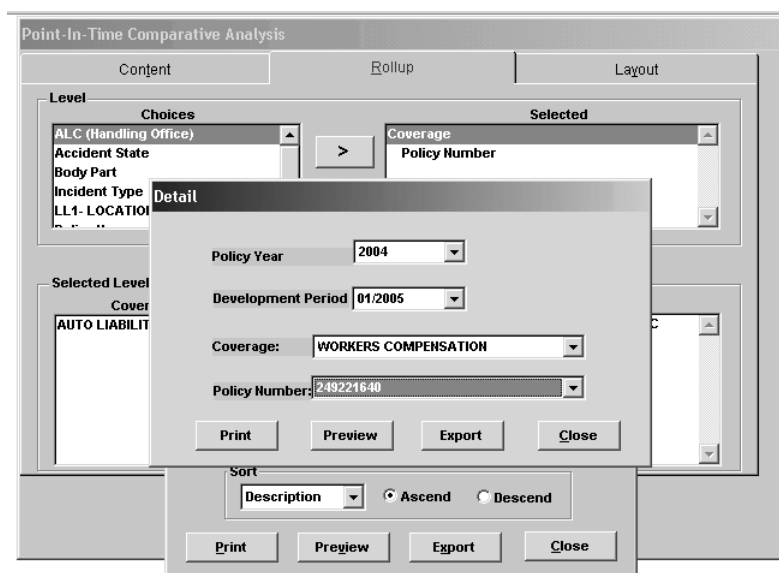
Clearview® Guidelines

Report Information
Section 3.8 – Advanced Reports/Point in Time Reports
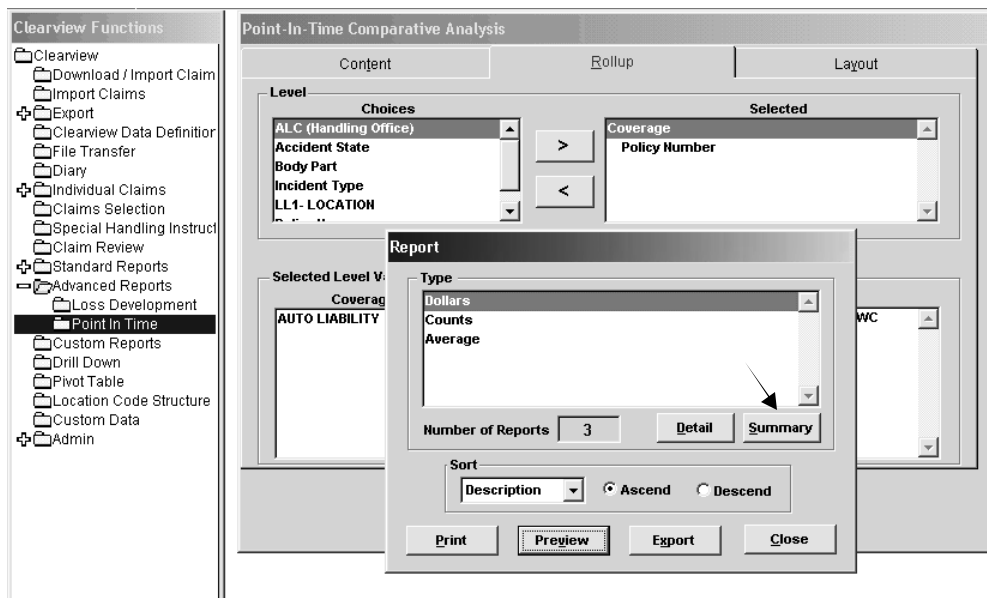
For a breakdown of Closed to Open losses, click on the Summary button. The report will tabulate the Count and Dollar amounts for Closed vs. Open claims for each selected point in time.
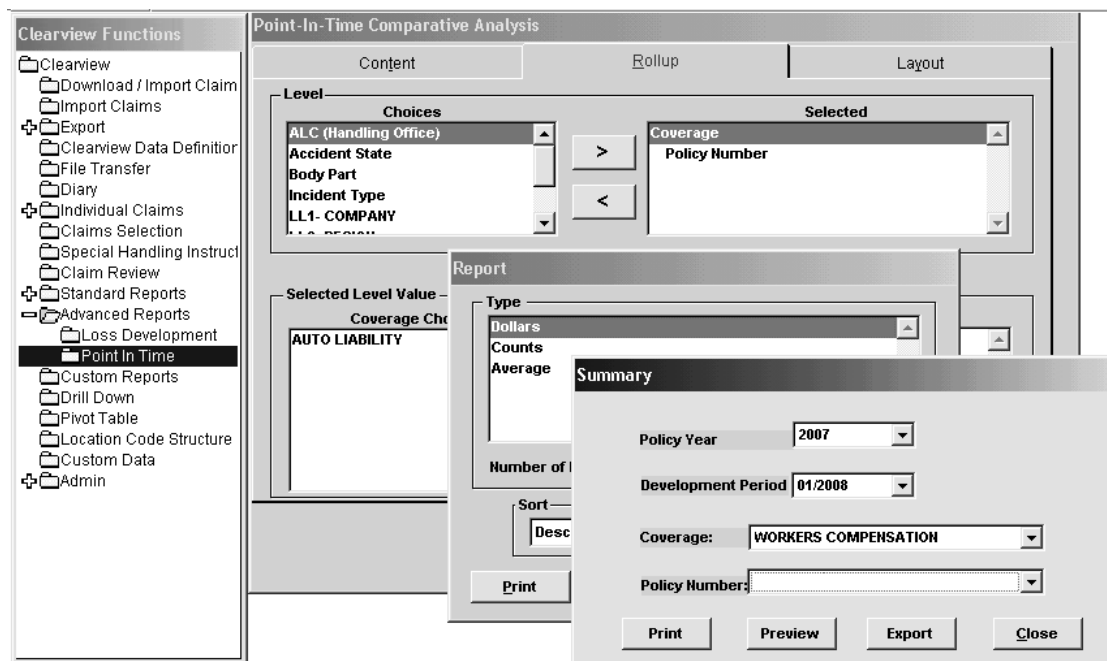
Clearview® Guidelines

Report Information
Section 3.9 – Custom Reports

Custom Reports are created by a Report Wizard that provides step-by-step instructions to help you build customized reports. You can use Custom Reports to create a new report, run an existing report or modify an existing report.

Double click Custom Reports.
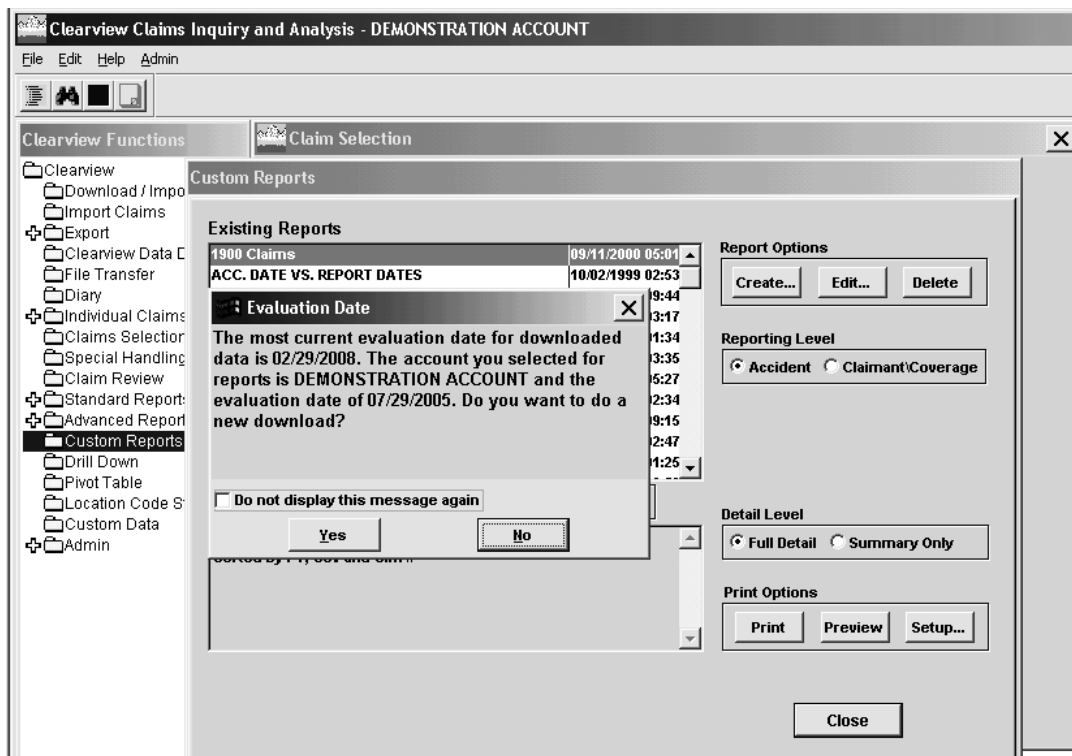
The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Yes or click No to retain the current download. Refer to Section 3.1 for instructions on downloading. If you do not want this pop-up box to appear, click the box next to Do not display this message again.

Clearview® Guidelines

Report Information
Section 3.9 – Custom Reports

The Claim Selection pop-up box may appear to remind you of Conditions In Effect. You may keep, delete or change current conditions. Click Close when finished. Refer to Section 3.6 for instructions on using Claim Selection.

Option boxes on the next screen provide you with several choices regarding the information to be included in your report. Information can be reported at Accident or Claimant/Coverage level. Detail information on a claim or just summary level information can be selected. You will be making these choices when you are ready to print or preview your report.

Click Create to create a new custom report, or click on an existing report and click Edit to modify that report.

Clearview® Guidelines

Report Information
Section 3.9 – Custom Reports

Create a Title for this custom report and select report orientation. Click Next.

Select columns you wish to include in this report by double clicking an item under Available Report Columns or clicking an item and clicking the top arrow to move the item to Selected Columns. Repeat for each desired item.

Within Selected Columns, change the order of fields by clicking and dragging the button to the left of the item up or down. Click Next.

Clearview® Guidelines

Report Information
Section 3.9 – Custom Reports

Select the columns you wish to sort on. Double click an item under Available or click an item and click the top arrow to move the item to Sort Order. Repeat for each desired item. **Note: Only items moved to the Sort Order box can be selected for Subtotaling in the next screen.**

Change the order of fields by clicking and dragging the button to the left of the item up or down in the Sort Order box. You can also change the direction of the sort (ascending or descending) by double clicking on the variable name in the Sort Order box. Click Next.

Choose the number of subtotal groupings. This field will default to 0. If you choose to have subtotals, you will be prompted for the fields (columns) to subtotal. Remember that the available fields will be the fields chosen in Sort Order on the previous screen. Click on the Page Break option if you would like to break on your subtotal fields. You also have the option to include counts in report. Selecting "Use a custom report layout" will open a report designer. If you choose this option, you will not be able to edit your report.

Clearview® Guidelines

Report Information
Section 3.9 – Custom Reports

Selecting "Use a custom report layout" will open a report designer (see screen print on previous page). If you choose this option, you will not be able to edit your report. Click Finish. A pop-up box appears to indicate the report was successfully created. Click OK.

The Custom Report has been created. This report will **automatically** update each time a new download is performed or criteria is selected/changed in Claims Selection.

Click on the report that you want to see, then choose the Reporting Level and Detail Level that you would like to apply. Click Preview to view this report prior to printing. For information on printing and/or previewing your report, see Appendix 2.

See Appendix 1 for information on choices available in this window, and refer to Clearview Data Definitions/Appendix 3 for more information on items under Available Report Columns in Step 2 of the wizard.

When previewing a legal-sized report, you will only see a letter-sized preview. When printing a legal-sized report, click on Print, then change paper to Legal via the Properties button in the Print Window (you may need to click on an Advanced button in the Print window to get to Properties).

"Create a new report" appears at the bottom of the wizard screens when editing a report. If you wish to create a report that's just slightly different from one that you have, click on the original report and then click on the Edit button. Click the box next to Create a new report, make the changes in the wizard (including report name) and click on Finish.

Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

Drill Down allows you to work through large amounts of loss data in an organized search pattern to target coverages, locations, injury types and concentration of claims that are driving your loss costs. Double click Drill Down.

The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Yes or click No to retain the current download. If you do not want this pop-up box to appear, click the box next to Do not display this message again.
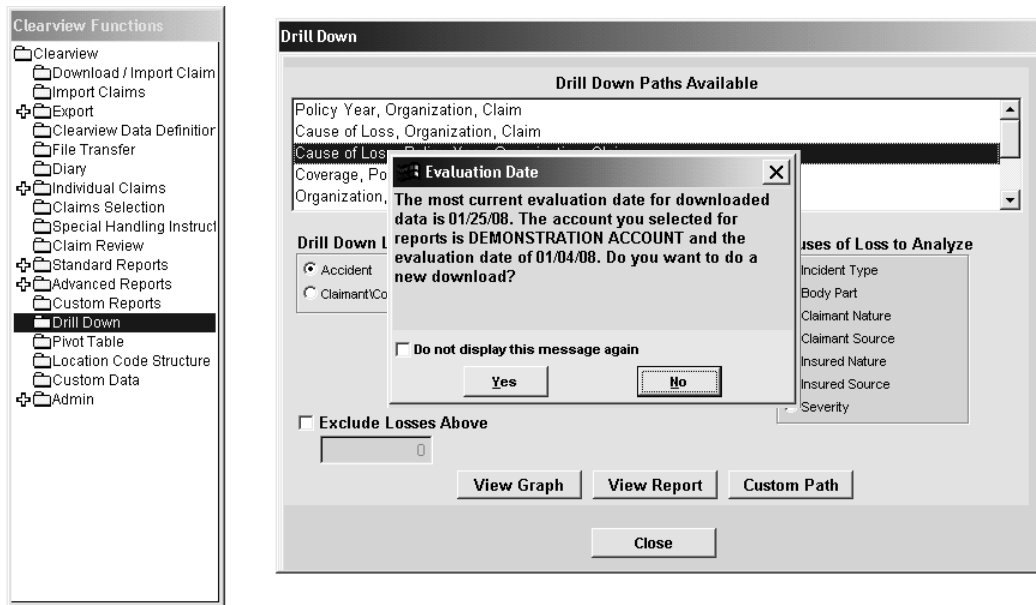
Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

The Claim Selection pop-up box may appear to remind you of Conditions In Effect (screen print not shown). You may keep, delete or change current conditions. Click Close when finished. Refer to Section 3.6 for instructions on using Claim Selection.

The Drill Down window enables you to define the type of drill down path and data against which you would like to analyze the distribution of your losses. If none of the pre-defined paths suits your needs, you can click on the Custom Path button and define your own.

Once a path is selected, you can view the results in either a graphical or spreadsheet form by clicking on either the View Graph or View Report button.

Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)
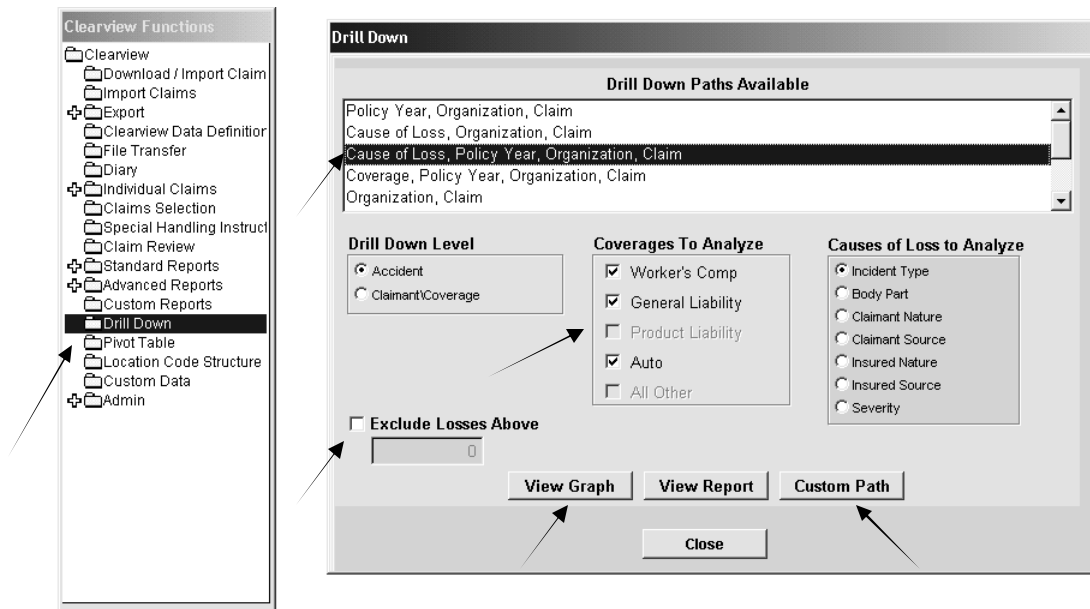
Select a Drill Down Path, either from the Drill Down Paths Available box or by clicking on the Custom Path button and creating your own.

You can modify the data in the graph by selecting Drill Down Level, entering an amount in the Exclude Losses Above box, and/or selecting coverages.

Select a Cause of Loss. Causes of Loss to Analyze box is displayed only when a path with "Cause of Loss" has been selected. Only <u>one</u> Cause of Loss type can be selected from this option group.

Click View Graph.

See Appendix 1and Clearview Data Definitions/Appendix 3 for information on choices and paths in this window.

Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

To change the graph characteristics, right mouse click anywhere on the gray background.
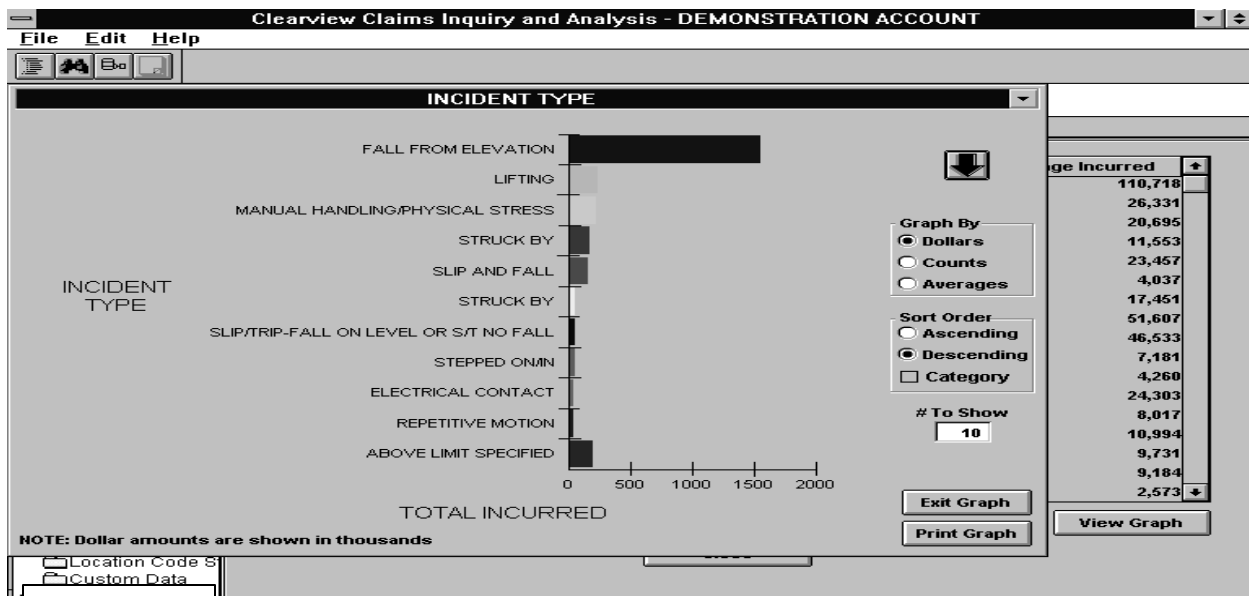
Select a Graph Type and Graph Style. Click OK.
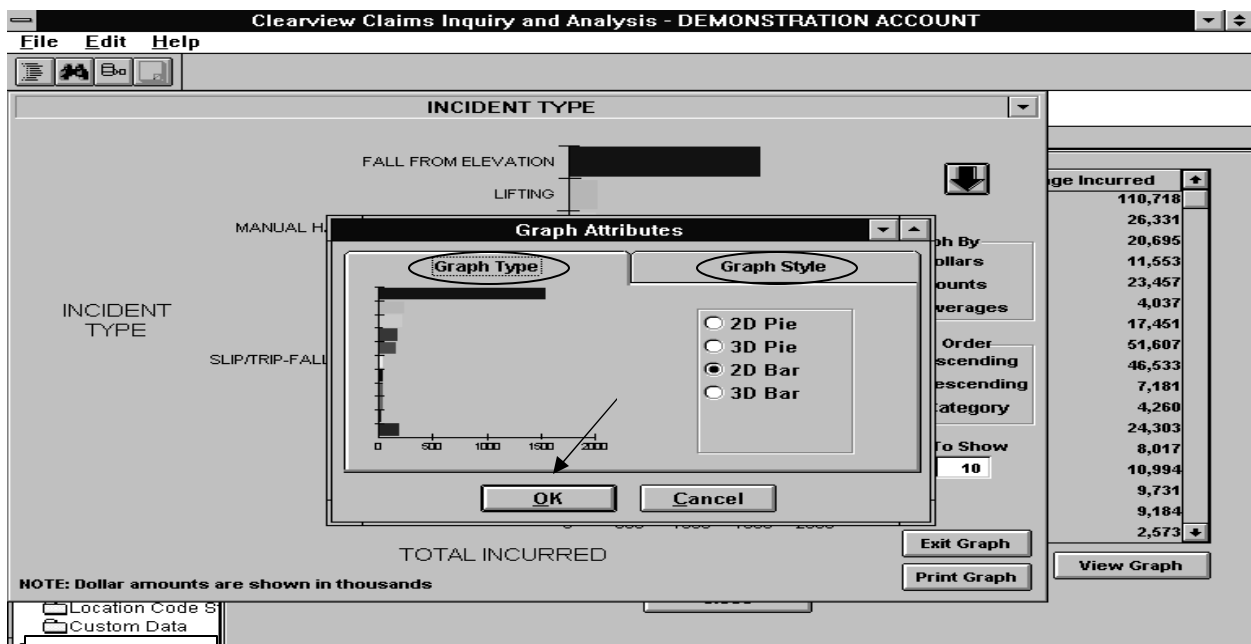
Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

Using the navigation tools, you can easily drill down segments of the graph from the highest level of the hierarchy all the way down to a specific claim.
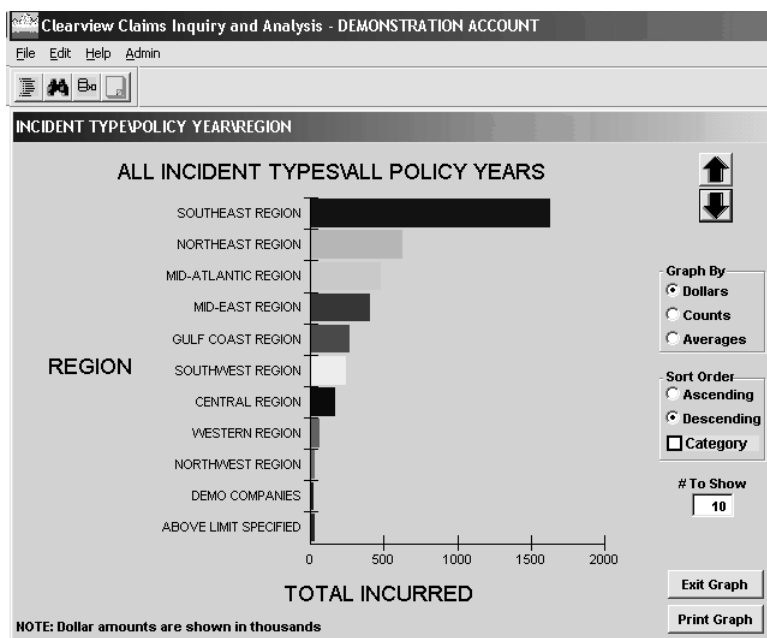
Click on the Graph By radio buttons to change the basis of the graph.

Click on the Sort Order radio buttons to change the order of the data displayed.

The number in # To Show indicates how many items in the graph's y axis. Note that "Above Limit Specified" indicates the aggregate value of the remaining data elements not falling within the # To Show.   In order to change the number of items shown on the y axis, highlight the number in the "# to Show" box, type in a new number, and hit Enter on your keyboard. The graph will refresh.

To view the graphs associated with each level of the path that you chose, click on the large black down arrow.

To drill down within a specific item in a level, double click on that piece of the graph and use the large black arrows to navigate through the path or items within a level of the path. See attached example (if the Attachments window is not open at the bottom of your screen, click on the Attachments tab or paperclip icon on lower left side of screen. Click on the Word document and click on Open).

Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

Click Print Graph. The Graph Print Options box appears. Click Print Setup to change print options. Click Print.
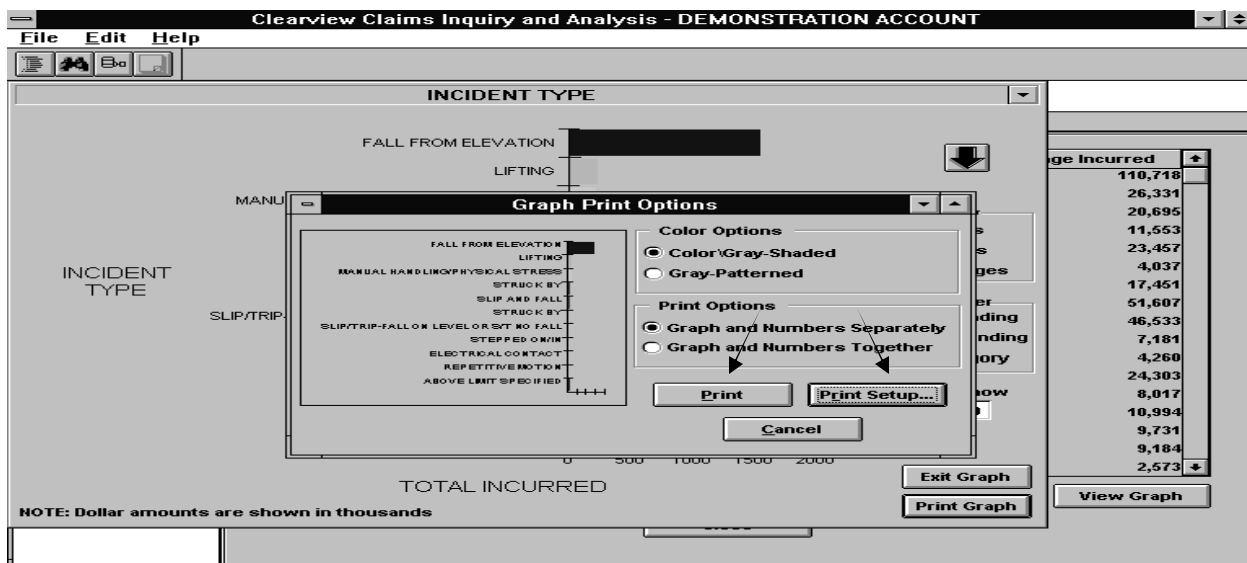
The Print pop-up box appears. Click OK to print. See Appendix 2 for information on printing.

Note: If you are printing the graph and numbers separately, this pop-up box will appear twice for you to click OK.

Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

After finishing the drill down in the path you selected, this screen appears displaying the Claim Number, Total Incurred, Count and Average Incurred. If you would like to see detail information on any claim, click on that claim and then click the View Detail button.

The Claim Detail screen appears (screen print not shown). Click Print to print the claim detail information. Click Close.

Clearview® Guidelines

Report Information
Section 3.10 – Drill Down (Graphs)

The View Criteria button will return you to the main page where you made your selections. View Report allows you to drill down in a table format instead of graphically. Click View Report.

By double clicking on a row, you can expand to the next level of detail. Drill down is available down to the claim level. At the claim level, you can view the claim detail as shown above. To print the spreadsheet, click Print Report. To return to the graph, click View Graph. Click Close to exit Drill Down.

Clearview® Guidelines

Report Information
Section 3.11 – Pivot Table

Pivot Table enables you to create extremely powerful interactive tables in Excel. You can drag and drop rows and columns around the sheet and discover new relationships in data. Because you are in Excel, you can use its full power to generate reports and graphs in the format you specify.* Double click Pivot Table.
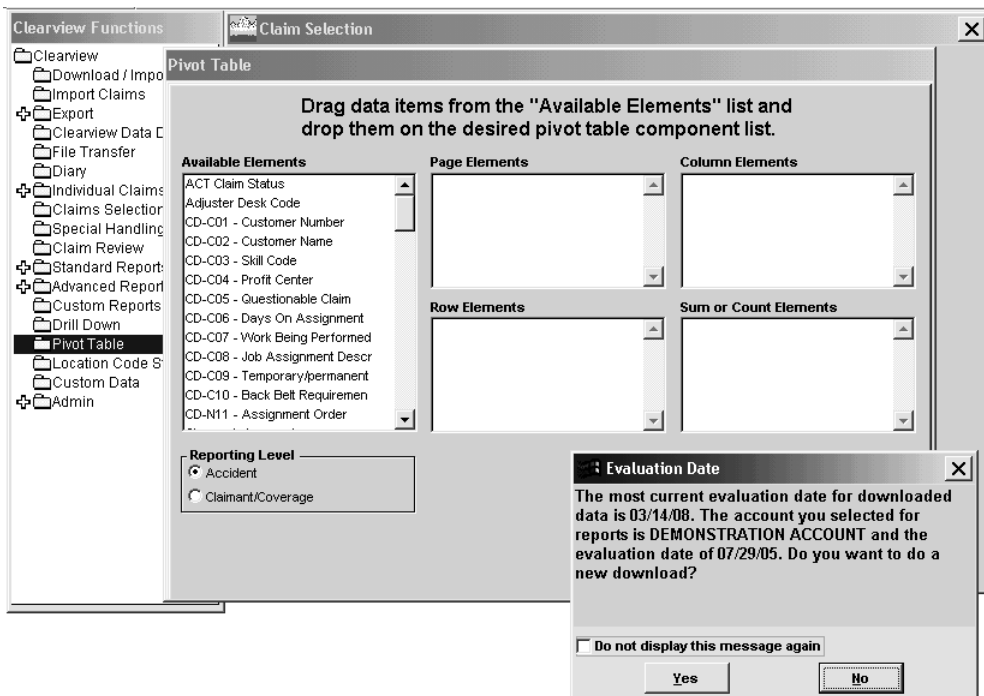
The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Yes or click No to retain the current download. Refer to Section 3.1 for instructions on downloading. If you do not want this pop-up box to appear, click the box next to Do not display this message again.

The Claim Selection pop-up box may appear to remind you of Conditions In Effect (screen print not shown). You may keep, delete or change current conditions. Click Close when finished. Refer to Section 3.6 for instructions on using Claim Selection.

*For more information on using Pivot Tables, click on Help in the Excel menu bar or call Client Support at 800-727-3071.

Clearview® Guidelines

Report Information
Section 3.11 – Pivot Table

The Pivot Table criteria screen appears.

Click on the Reporting Level button to select the reporting level.

Click and drag items from the Available Elements box to populate your choices into the Page Elements, Column Elements, Row Elements and Sum or Count Elements. See next page for an illustration.

Please note that the Sum or Count Elements component should only contain elements to be counted or summed.

Once you have made your selections, click on the Create Pivot Table button to generate the pivot table or click on the Clear Selections button to start over.

See Appendix 1 for more information about choices in this screen. For information on the items listed under Available Elements, see Clearview Data Definitions/Appendix 3.

Clearview® Guidelines

Report Information
Section 3.11 – Pivot Table

Excel is opened and the Pivot Table is created.

To view items placed in Page Elements (LL1 - City and Handling Office in example below), click the down arrow and select a field. Clicking the drop-down arrow for a page element allows you to refresh the table to display only the data that you selected.

Page Element (LL1 - City and Handling Office)

Row Element (Coverage)

Column Element (Claim Status)

Sum or Count Element (Clam Number, financials)

Clearview® Guidelines

Report Information
Section 3.11 – Pivot Table

The Pivot Table will return information for **only** the item selected. Click File, Print, to print the Pivot Table.

You can also double click on any sum or count to add another spreadsheet to the workbook, containing all of the claims that comprise the total that was double clicked on.

Click File, Save Copy As, to save the Pivot Table. The user's C: drive shows as "C$ on 'Client (G:)."

Click File, Exit, to return to Clearview.
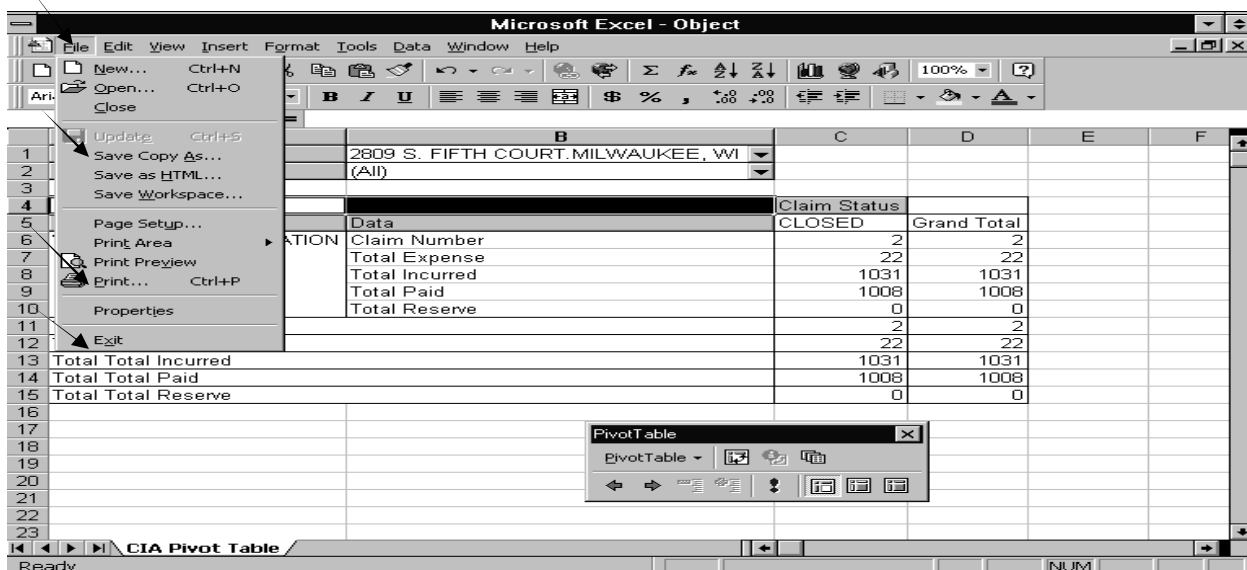
Click Close to exit Pivot Table.

Clearview® Guidelines

Miscellaneous Information
Section 4.1 – Clearview Data Definitions

Clearview Data Definitions are definitions of loss data fields. Double click Clearview Data Definitions. You can print the definitions by clicking on the Print icon in the tool bar.

This information is also available in Appendix 3.
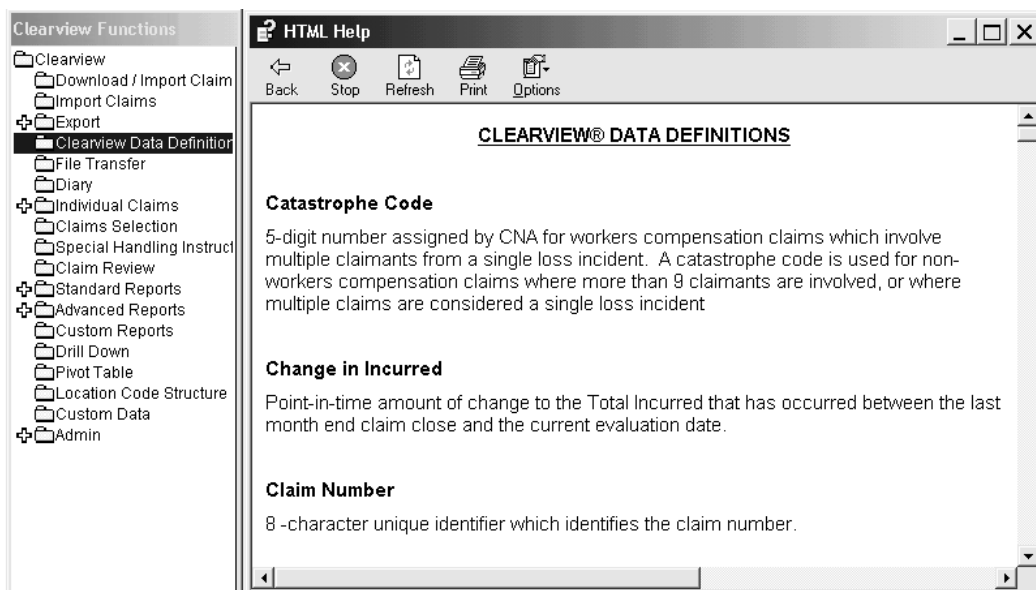
Clearview® Guidelines

Miscellaneous Information
Section 4.2 – Diary

You can set up a diary reminder by clicking on Diary in the Clearview Functions list. Select a date and then type your reminder. Click on Close.

Reminders appear in a pop up box when you log into Clearview. Review your message.

Click Close to continue.
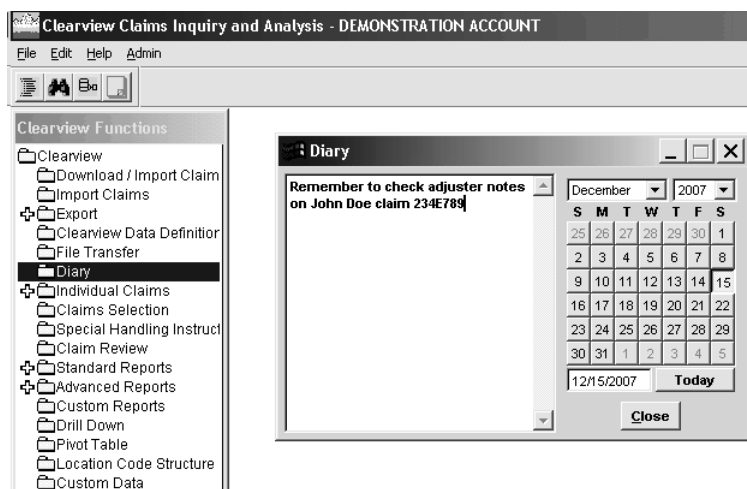
Note: If you do not log into Clearview on the reminder date that you chose, the reminder will not pop up.

Clearview® Guidelines

Miscellaneous Information
Section 4.3 – Special Handling Instructions

Special Handling Instructions are specifically defined for each company. Double click Special Handling Instructions.
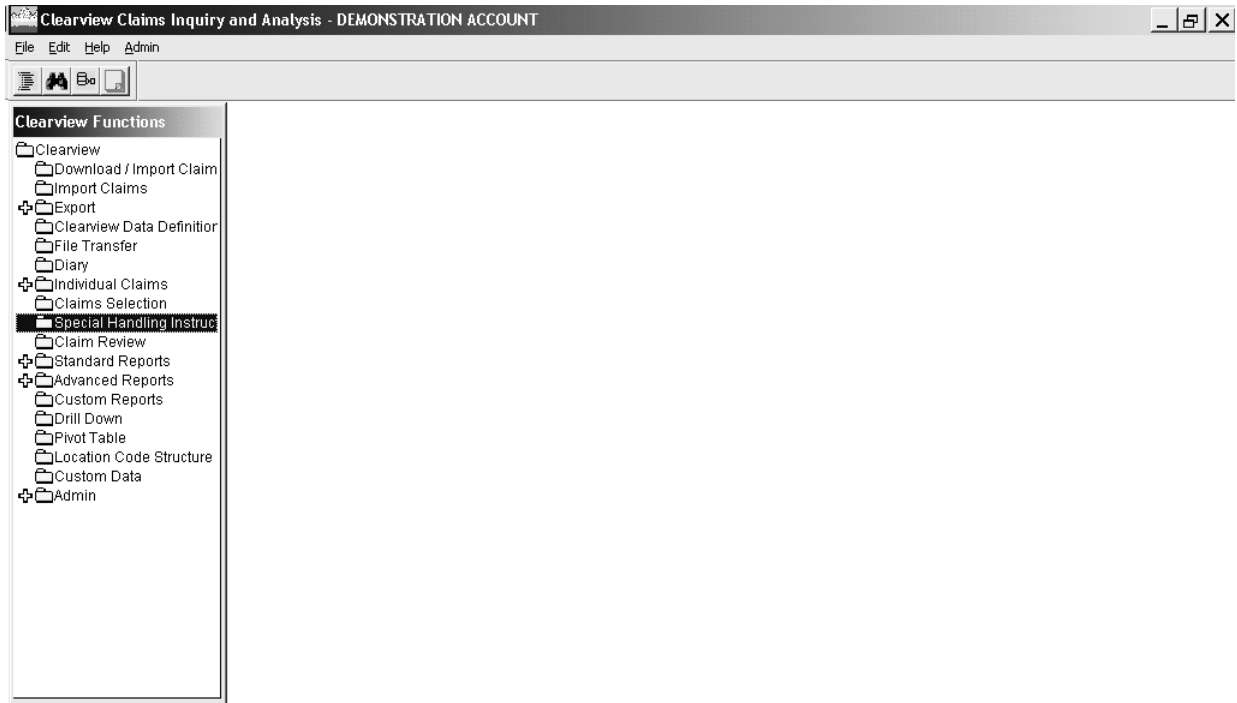
Clearview® Guidelines

Miscellaneous Information
Section 4.4 – Claim Review

Claim Review displays a scrollable list of all claims available for reporting analysis as well as the ability to view information on a particular claim. Search and sorting capabilities are provided. Double click Claim Review.

The Evaluation Date pop-up box may appear to remind you of the most current evaluation date for downloading. You may perform a new download by clicking Yes or click No to retain the current download. If you do not want this pop-up box to appear, click the box next to Do not display this message again.

Note: Claim Review applies your conditions from Claims Selection.
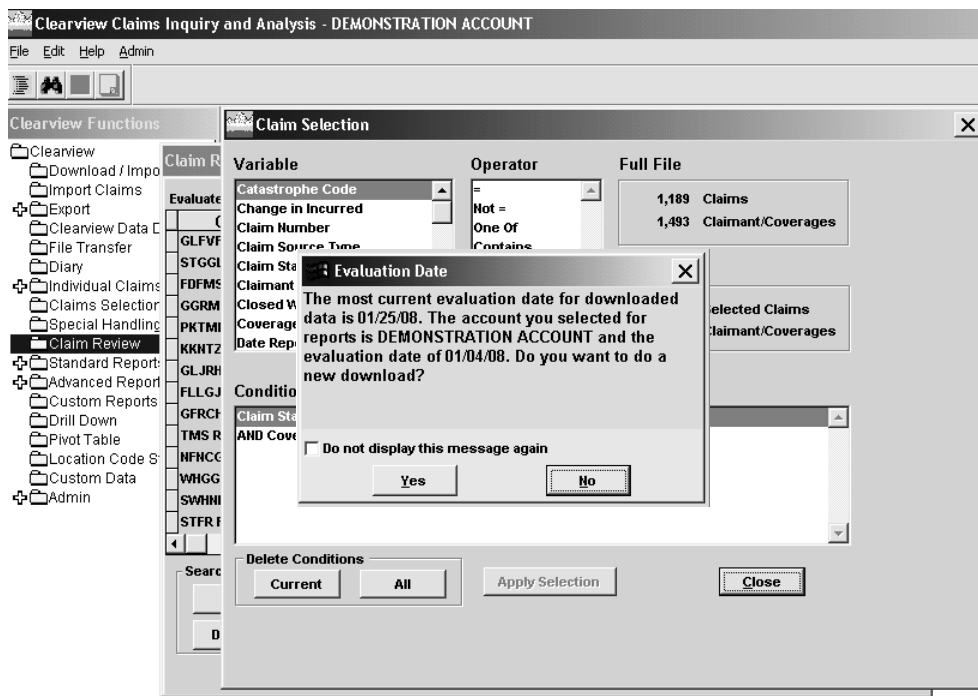
Clearview® Guidelines

Miscellaneous Information
Section 4.4 – Claim Review

The Claim Selection pop-up box may appear to remind you of Conditions in Effect. You may keep, delete or change current conditions. Click Close when finished. See Section 3.6 for more information on Claim Selection.

The Claim Review screen appears. The valuation date is shown in the upper left hand corner of the screen. A schedule of valuation dates is available on the Risk Management Advantage® portal by clicking on the current year's link under "Month End Schedule" (Disregard if you imported a prior download for data valued as of that point in time).

Clearview® Guidelines

Miscellaneous Information
Section 4.4 – Claim Review

The partition bar allows you to scroll the right side of the screen left or right without losing the key information on the left side. If you wish, you can remove this bar by clicking on the Show Grid Partition checkbox.
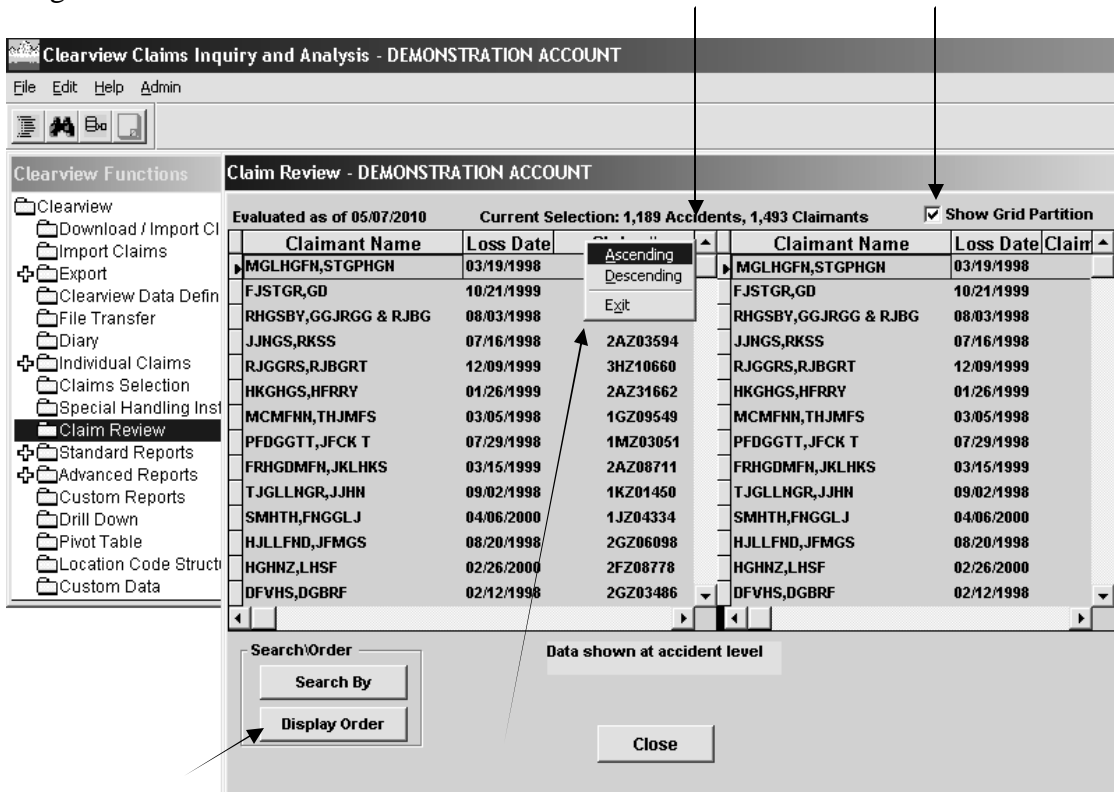
The grid is sorted by the highest Total Incurred. You can sort any of the fields in ascending or descending order. Point anywhere on the column you want to sort and right mouse click.

Left click Ascending or Descending (or Exit if you do not wish to sort on this column). For more advanced sorting, click on Display Order.

The Search By button provides the capability to search by Claimant Name, Claim Number, Driver Name or Social Security Number.

Individual Claim Functions can be accessed from the Claim Review screen. Click anywhere on a claim to select it, then double click on the function (e.g., Adjuster Notes) to access that function for the claim selected. See Section 2 for more information on the Individual Claim Functions.

Clearview® Guidelines

Miscellaneous Information
Section 4.5 – Location Code Structure

Location Code Structure provides information about the entities and reporting structures for your account. Double click Location Code Structure.

Contact your RMIS Consultant or Client Support regarding any changes to your location structure.
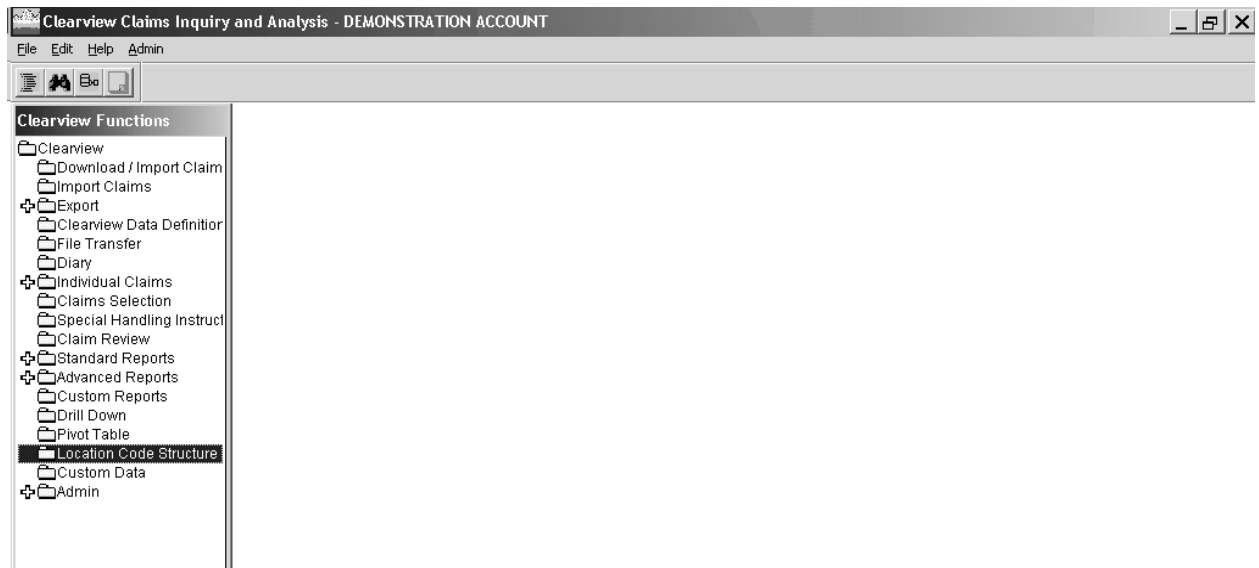
Clearview® Guidelines

Miscellaneous Information
Section 4.5 – Location Code Structure

To view your structure, double click on the plus sign in front of each location description within the hierarchy tab. Any description with a plus sign can be opened to reveal lower levels of the hierarchy. To produce a report displaying the complete hierarchy, choose the Reports option by clicking on Reports in the tool bar.
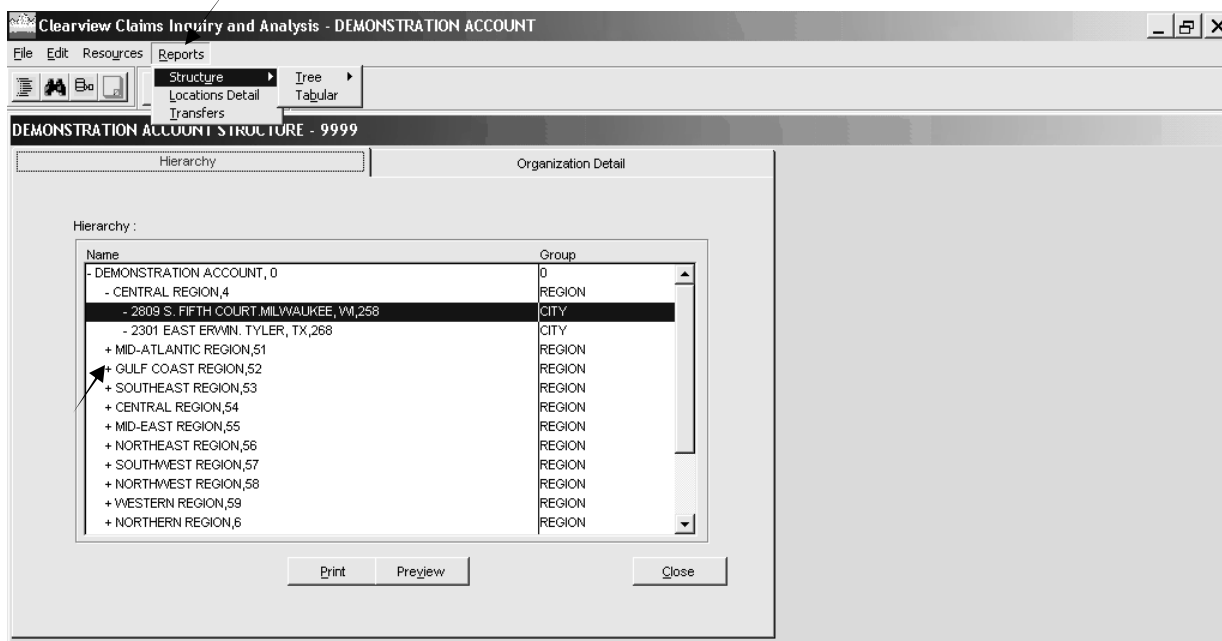
For a list of locations by hierarchy, click on Structure, then Tree. If you click on Whole, you will see all locations under their parent entities. If you want to see just a portion of the structural hierarchy, click on a parent entity in the Hierarchy screen shown above, then click on Reports/Structure/Tree/Part.

The Tabular report under Reports/Structure provides a list of locations by location code as well as their parent entities.

The Locations Detail report provides detailed information (address, parent entities, contact information, start/stop dates and transfer codes, if applicable).

If all non-incident claims under a location should be moved to a different location for loss run purposes, a transfer code is used to move the claims electronically. Any locations that have a transfer code can be viewed via the Transfers report.

Clearview® Guidelines

Miscellaneous Information
Section 4.6 – Custom Data

Custom Data allows you to capture additional fields that you define. This information is captured at the claim level and is available in Exports, Custom Reports and Pivot Tables.

Double click on Custom Data in the Clearview Functions list.

Ten alphanumeric and five numeric data fields are available.

RMIS can set up your data fields for you and work with you on the collection and population of the data in Clearview. Please contact your RMIS Consultant or RMIS Client Support for more information.

Clearview® Guidelines

Miscellaneous Information
Section 4.6 – Custom Data

To edit data that has already been imported into Clearview, click the Search button in the upper right-hand corner. This will bring up the Search for a Claim window.

Enter the claim number in the white box next to Enter Claim Number, then click OK. This will bring up the claim and its current custom data.

Highlight the data that you want to change, then type over it.

Click on Save.

Clearview® Guidelines

Logoff
Section 5.1 – Clearview

To logoff Clearview, **never** click the "x" in the upper right hand corner of the screen. It may appear that you have exited Clearview, but actually the program is still running in the background. If this happens, you will have to call Client Support to have your ID disconnected before you will be able to log back into Clearview. Click File, Exit, to exit Clearview.
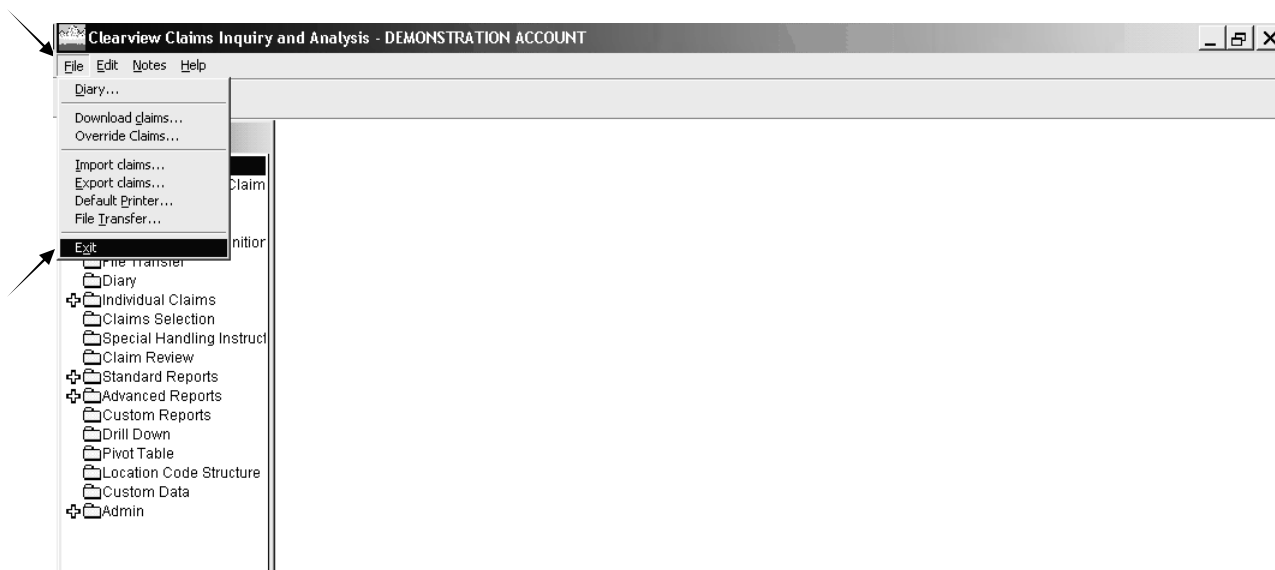
The Exit Clearview pop-up box appears. Click Yes.

Clearview® Guidelines

Appendix 1 – Choices in Clearview Screens

Accident or Claimant/Coverage

In exports, Custom Reports, Drill Downs, Pivot Tables and Advanced Reports, you can choose either **Accident** or **Claimant/Coverage**. **Accident** = total claim values. **Claimant Coverage** = suffix level totals. See Clearview Data Definitions/Appendix 3 for more information on claim suffixes.

Accounting Basis

Found in Standard and Advanced Reports. You can choose either **Policy Year,** which is the period of the claim service or insurance contract during which the incident occurred, or **Accident Year**, which is the calendar year in which the incident occurred.

All Losses/Cap Losses At/Exclude Losses

Found in Advanced Reports (Exclude Losses also found in Drill Down). Use these radio buttons to limit the data included in your reports. **All Losses** is the default. **Cap Losses** will limit the data to claims that fall below the capping amount that you enter. **Exclude Losses Above/Below** will limit claims included in your report to those that fall within the financial parameters specified. In Advanced Reports, these fields are applied to whichever dollar selection you make under Content Selection. In Drill Down, it is applied to Total Incurred.

As of Month

Found in Point in Time reports. Use this drop down box to indicate which month within each year you would like to compare. Clearview includes the month shown in Start Month/Year when counting (e.g., if start month is March and you choose "As of Month 3," data will be as of May).

Claim Types/Claim Source Type

Found in the Download function. System automatically defaults to **CNA**, which pulls non-incident claims; **Incidents** = CNA incident claims (aka Report-Only or FYI claims); **New Claims** = Claims that have not yet gone through coding; if the following apply to your account, you can pull in other lines of business by selecting **HealthPro** or **Other Carrier** data.

Clearview® Guidelines

Appendix 1 – Choices in Clearview Screens

Claims or Claimant/Coverages

Found in Claim Selection. **Claims** = one claim is accumulated when one or more claimants report losses to CNA within the same policy on the same date of loss for the same loss occurrence. **Claimant/Coverages** = count of each coverage for a claimant, such as indemnity and medical for Workers' Comp or bodily injury and property damage for liability losses.

Detail Level

Found in Custom Reports. **Full Detail** will provide you with more detailed information (depending on the report set up), while **Summary Only** will summarize the data in your report.

Development Display

Found in Loss Development Triangles. You can select whether you would like the data displayed by years (including the current year to date), quarters or months.

Full File and Processed

Found in Claim Selection. The **Full File** box displays the claim and coverage counts of all claims for that account. The **Processed** box displays the claim and coverage counts after selection criteria is processed.

Organization

Found in Drill Down Path, refers to the account's locations (applicable only if the account has a location structure).

Report Type

Found in Standard Reports. **Organizational Detail** will display claims by the location level selected, and **Corporate Summary** will not utilize the location structure in formatting the report.

Save Selection button

Found in Standard Reports, allows you to save the selections made within the report pop-up box.

Clearview® Guidelines

Appendix 1 – Choices in Clearview Screens

Sort Order button

Found in Standard Reports, allows you to change the default sort order of any Standard Report.

Start Month/Yr

Found in Advanced Reports. Default indicates the earliest claim (date of loss) month and year available for that account. You can change the start month and year used in your report by clicking the drop down arrow.

See Appendix 3 for Clearview Data Definitions.

Clearview® Guidelines

Appendix 2 – Printing

Print Preview

Click on Preview. The Selection In Effect (upper left side) indicates the criteria chosen for the report (e.g., Accounting Year Basis, Years, Type of Coverage, etc.). The evaluation date of the report and the date the report was run can be found on the upper right side of the report. The icons at the top of the screen should be used to page through the report, change size of preview, and printing to default printer.

To exit the report, click the Close Preview button.

Clearview® Guidelines

Appendix 2 – Printing

Printing

To print a report, simply click on the print button. A pop-up box will appear like the one below. When you select the dropdown box under Printer Name, you will see two or more choices. One will be your default printer and one will be pdfFactory. If you want to print the report to a hard copy, choose your default printer (this will usually already be selected). Click on OK.
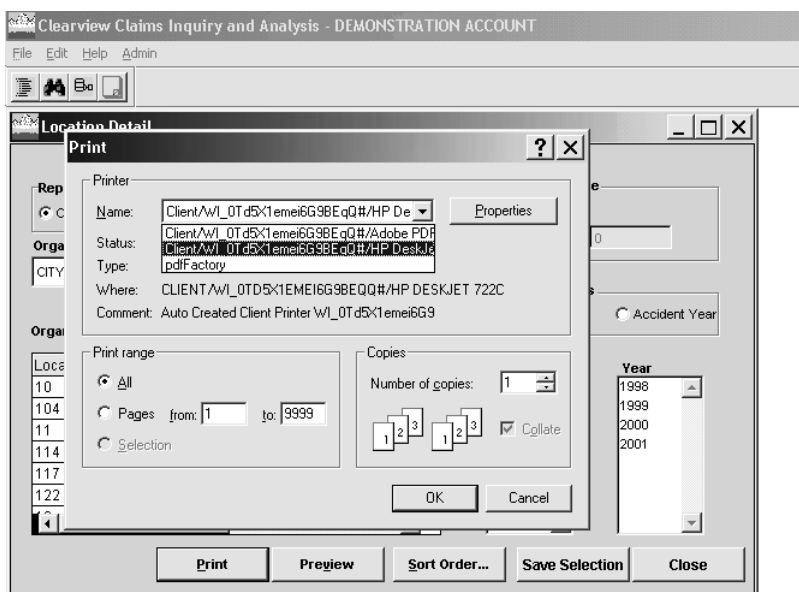
To print the report to an electronic file, click on the pdfFactory printer. Then click on OK. The report will be created as a pdf file and will appear in your file management list. You will then need to use the File Transfer function to transfer the file to your C: drive. Refer to Section 3.5 for instructions on using File Transfer.

Clearview® Guidelines

Appendix 2 – Printing

Setting Your Default Printer to pdf

If you only want to create electronic files and don't want any reports to print to a hard copy, you can set your default printer in Clearview to pdfFactory for the entire session. To do this, click on File in the tool bar and select Default Printer.
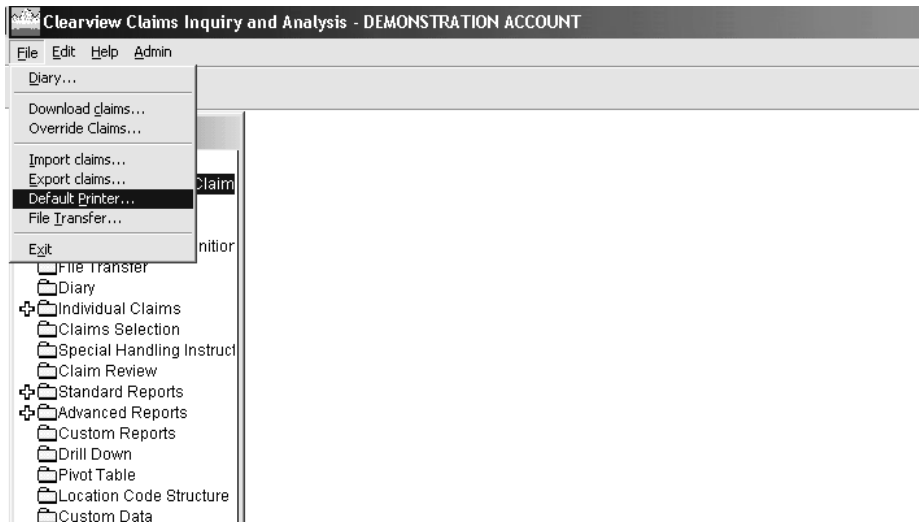
A list of printers will appear in the dropdown box (shown below). Click on the pdfFactory printer. This printer will stay selected until you select a different printer or until you exit Clearview and log back in for another session. To print to an electronic file, click on the pdfFactory printer. Then click on Commit. Anything you print during this session will be created as a pdf file and will appear in your file management list. You will then need to use the File Transfer function to transfer the file to your C drive. Refer to Section 3.5 for instructions on using File Transfer.
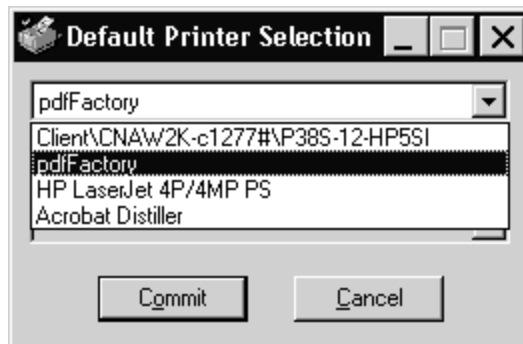
Clearview® Guidelines

Appendix 2 – Printing

There are several advantages to setting the default printer to pdfFactory. First, if you know that you want to produce only electronic copies of reports, you can set the default printer to pdfFactory and not have to choose it again during this session. It will always be selected during your current session. The same would apply if you wanted to switch to using a different printer to print hard copies of reports. Second, you will be able to print Financial Transactions to a PDF file. Remember, however, that you must make the change in default printer prior to clicking the print button in the Financial Transaction module. Third, you can create PDF files directly from the print preview screen when viewing reports.

CLEARVIEW® DATA DEFINITIONS

Catastrophe Code

5-digit number assigned by CNA for workers compensation claims which involve multiple claimants from a single loss incident. A catastrophe code is used for non-workers compensation claims where more than 9 claimants are involved, or where multiple claims are considered a single loss incident

Change in Incurred

Point-in-time amount of change to the Total Incurred that has occurred between the last month end claim close and the current evaluation date.

Claim Number

8 -character unique identifier which identifies the claim number.

Claim Status

Indicates whether a claim is open or closed.

Claim Suffix

Used in conjunction with the Claim Number, the 2-digit suffix varies by coverage and is populated as follows:

For workers compensation claims, '11' indicates the indemnity portion and '21' indicates the medical portion. In workers compensation-medical only claims, the suffix is '21'. For employer liability claims, the suffix is '31'.

For non-workers compensation claims, the first digit of the suffix designates the claimant and the second digit designates the coverage (i.e., '11'-first claimant, first coverage; '12'-first claimant, second coverage; '21'-second claimant, first coverage, etc.)

Note: Suffix will be blank if an accident-level export is chosen.

Closed Without Payment Indicator

Indicates whether a claim or suffix was closed without payments being made.

Coverage

Identifies the insurance coverage or line of business which applies to the loss. Examples are: workers' compensation, auto liability, product liability, and general liability.

Date of Loss

Date the loss incident occurred.

Date Reported

Date on which CNA was notified of the loss incident.

Description of Loss

Narrative description of the loss incident.

Driver's Name

Name of the individual operating the vehicle involved in the incident.

Handling Office

Name of the claim office location responsible for handling the claim.

Insured Name

Name of the business entity insured by the policy under which the loss incident occurred.

Insured Nature

Description of the coverage characteristic for the insured's injury or damage. The value set for this field varies depending on the coverage.

Insured Source

Description of the vehicle, object or agent directly involved in the insured's loss.

Last Financial Transaction Date

Most recent month/year when a financial change occurred on a claim. Financial changes include claim payments, reserve changes, recoveries and allocated expenses.

Legal Status

Identifies the current status of legal actions related to the claim. Examples are: Non-legal, Legal/Staff Counsel, Legal/Panel, Legal/Non-panel, and Workers Compensation/Staff Counsel:

Loss Body Part

Name of the part of the body directly affected by the loss incident.

Loss Incident Type

Description of the initiating event, activity, or peril which produced the loss. The value set varies depending on the coverage. Examples are: (WC) Repetitive motion; (GL) construction defect; (AU) crossed center line, etc.

Loss Year

Year in which the incident occurred.

Medical Only Indicator

Indicates whether this claim has only medical expenses and not indemnity expenses.

Medical Rehab Code

Indicates whether the claimant is enrolled in a medical rehabilitation program.

Name of Claimant

Name of the individual presenting a claim for the loss incident.

Nature of Injury

Description of the physical characteristic of the claimant's injury. Examples are: bodily injury, carpal tunnel, slander/libel

Physical Source

Description of the object, substance, equipment or agency directly involved in the loss incident. The value set varies depending on the coverage

Policy Number

Number assigned to an insurance or service contract.

Policy Year

Identifies the period of the insurance or claim service contract.

Premium State

The state code indicating the state in which exposure for loss is covered by premium paid to the insurance carrier by the insured.

Severity of Loss

Description of the extent of injury for workers compensation-related loss incidents. Examples are: permanent total disability, permanent partial disability, temporary total disability, etc.

Social Security Number

Claimant's social security number.

State

The state code indicating the state in which the loss incident took place. The value set includes Canadian provinces, U. S. territories, and foreign countries.

Total Expense

Amount of the expenses paid to date which can be directly assigned to the loss incident.

Total Incurred

Calculated dollar amount reflecting the Total Paid plus Total Expense plus Total Reserve.

Total Paid

Amount paid to date, other than Total Expense, on the loss incident.

Total Reserve

Funds which are set aside by an insurance company for the purpose of meeting claim obligations.

Total Salvage

The recovery reducing the amount of loss. Total Salvage and Total Subrogation are deducted from Total Paid for reporting purposes.

Total Subrogation

This field represents the total dollar amount recovered to date on the claim.

Tracking Indicator

Customer-defined one-digit field which may be used by a customer for special tracking of a claim.

Type of Loss Description

The description of the detailed coverage classification for the claim. Examples are: Workers Compensation (indemnity/medical), Auto Liability and General Liability (bodily injury/property damage)

Type of Loss Code

The 4-character code associated with the detailed coverage classification for the claim.

Location Level 1 – Code

Code of the location at which the loss incident occurred. This level reflects the lowest level in a reporting hierarchy structure. Code can be numeric, alpha or both, and 1 – 12 characters.

Location Level 1 – Name

Customer-specific name associated with the (1-12 character) code.

Location Level 2 – Code

Code of the location immediately above the location at which the loss incident occurred.   Code can be numeric, alpha or both, and 1 – 6 characters.

Location Level 2 – Name

Customer-specific name associated with the code defining the customer's physical or organizational level at which reporting is desired.

Location Level 3 – Code

Code of the location immediately above the level 2 location at which the loss incident occurred. Code can be numeric, alpha or both, and 1 – 6 characters.

Location Level 3 – Name

Customer-specific name associated with the code defining the customer's physical or organizational level at which reporting is desired. This level is the next reporting level above level 2 name in a reporting hierarchy structure.

Location Level 4 – Code

Code of the location immediately above the level 3 location at which the loss incident occurred. Code can be numeric, alpha or both, and 1 – 3 characters.

Location Level 4 – Name

Customer-specific name associated with the code defining the customer's physical or organizational level at which reporting is desired. This level is the next reporting level above level 3 name in a reporting hierarchy structure.

Location Level 5 – Code

Code of the location immediately above the level 4 location at which the loss incident occurred. Code can be numeric, alpha or both, and 1 – 3 characters.

Location Level 5 – Name

Customer-specific name associated with the code defining the customer's physical or organizational level at which reporting is desired. This level is the next reporting level above level 4 name in a reporting hierarchy structure. There are no additional reporting levels available beyond this level.

Claim Source Type

Indicates the type of claim: CNA=CNA non-incident claims, INCIDENT=CNA incident claims, GLOBAL=International claims, IDM=Integrated Disability Management claims, TPA=TPA claims.

Original IRIS Number

The original IRIS number to which this claim was associated.

Lost Time Claims

Indicates whether this claim has an indemnity suffix (11).

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ADDITIONAL DATA FIELDS FOR EXPORTING, CUSTOM REPORTING AND PIVOT TABLES

**<u>A</u>vailable in Exporting and Custom Reporting only

**Adjuster First Name

First name of the claim adjuster handling the claim. Suffix level.

**Adjuster Last Name

Last name of the claim adjuster handling the claim. Suffix level.

**Adjuster Address

Mailing address of the claim adjuster handling the claim. Suffix level.

**Adjuster City

City of the claim adjuster handling the claim. Suffix level.

Adjuster Desk Code

Code identifying claim adjuster's work unit, and in some cases, the assigned supervisor. If first position is alpha, it is an adjuster desk code. If first position is numeric, it is a supervisor code. Claim level.

**Adjuster State

State of the claim adjuster handling the claim. Suffix level.

**Adjuster Zip

Zip code of the claim adjuster handling the claim. Suffix level.

**Adjuster Work Phone

Phone number of the claim adjuster handling the claim. Suffix level.

ACT Claim Status

Claim status code. O=Open, C=Closed, R=Reopened, N=New claim. Claim level.

Claimant Age

Difference between Claimant's Date of Birth and Date of Loss. Suffix level.

Claimant Date of Birth

Claimant's date of birth. MMDDYYYY. Suffix level.

Claimant Date of Hire

Claimant's date of hire. MMDDYYYY. Claim level.

Claimant Gender

Claimant's gender. M=Male, F=Female. Suffix level.

Claimant Marital Status

Claimant's marital status. M=Married, S=Single, R=Separated, U=Unknown. Suffix level.

Date Closed

Date on which the claim was closed. MMDDYYYY. Claim level.

Date Opened

Date on which the suffix was opened. MMDDYYYY. Suffix level.

Payment Through Date

Last day of the most recent indemnity payment period. MMDDYYYY. Claim level.

Date Reopened

Date on which the suffix was reopened. MMDDYYYY. Suffix level.

Date Reported to Employer

Date on which the claim was reported to the employer. MMDDYYYY. Claim level.

Days Lost

The number of workers' compensation days lost that has been paid.

Days Open

Difference between Date of Loss and current date or Date Closed. When these data values are 0, then one or both of the dates used to calculate the data is not available.

Driver Age

Age of the driver. Claim level.

Driver Date of Birth

Driver's date of birth. MMDDYYYY. Blank for non-Auto claims. Claim level.

**Field Service Indicator

Indicates the CNA business area in which the suffix currently resides. Values include Triage, Express, Service Center, MCU and Other. Suffix level.

Jurisdiction State

Code of state, territory or federal entity under whose laws the claimant's compensable injury is paid. Claim level.

Length of Service

Difference between Employee Hire Date and Date of Loss (years in whole numbers, 0 if less than 1 year). Claim level.

Loss Year/Month

The year and month in which the incident occurred. Claim level.

Loss Year/Quarter

The year and quarter in which the incident occurred. Claim level.

Occupation Class Code (NCCI)

The National Council on Compensation Insurance code for the claimant's occupation. Suffix level.

Occupation Description

Description of claimant's occupation. Claim level.

Policy Effective Date

Date term of the policy became effective. MMDDYYYY. Claim level.

Producer Code

Code that identifies a CNA producer (agent, agency, or broker).   Claim level.

Salvage Indicator

Indicates whether the claim has salvage potential. Suffix level. Codes:

N = No Potential

Y = Potential Exists

At the accident level, the coding will be:

Y = If any suffix in the claim has a Y value

N = If all suffixes in the claim have N values

Secondary Injury Fund Indicator

Indicates whether a portion of the claim payment is potentially recoverable from the applicable state secondary injury fund. Suffix level. Codes:

N = No Potential

Y = Potential Exists

SIU Flag

Indicates whether the claim has investigation potential. Claim level. Codes:

Y = Claim has been referred to SIU

N = Claim has not been referred to SIU

Blank = Claim has not been referred to SIU (Incidents show as blank)

Subrogation Indicator

Indicates whether the claim has subrogation potential. Suffix level. Codes:

N = No Potential

Y = Potential Exists

At the accident level, the coding will be:

Y = If any suffix in the claim has a Y value

N = If all suffixes in the claim have N values

Supplemental Fund Indicator

Indicates whether the claim has potential for recovery from a supplemental benefit fund.   Suffix level. Codes:

0 = No Supplemental potential

1 = Has Supplemental potential

Time of Day

Time of day the incident occurred. HH:MM AM|PM. Claim level.

TT/PT Payment Indicator

Y/N indicator of whether a TT or PT Payment was made.

TT = Temporary Total

PT = Permanent Total