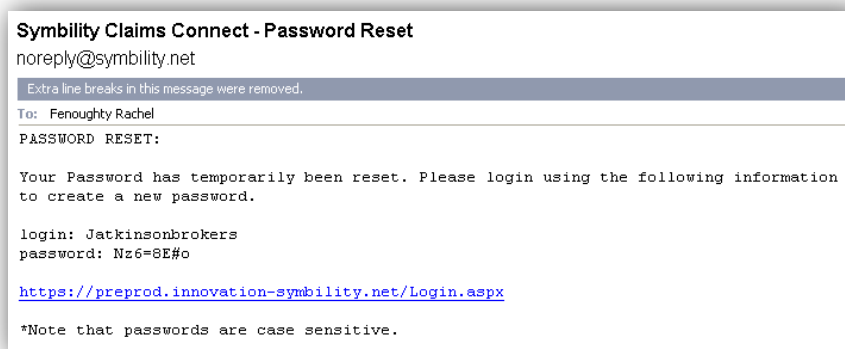


Symbility Guest Company Access

Guest access to Symbility provides a read only view of all your claims that will allow you to monitor progress, view scopes of works and costs, identify claim owners and view all interactions between Aviva/Asprea, contractors and customers.

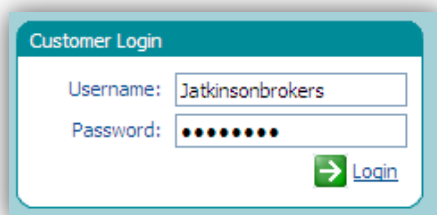
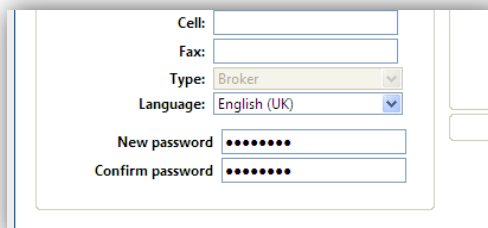
Initial Set Up and Logging On

You will receive a standard Symbility email with your credentials:



- Username or Login
- Temporary Password
- Link to Symbility

- Select the link which will open Symbility Connect
- Enter your new credentials

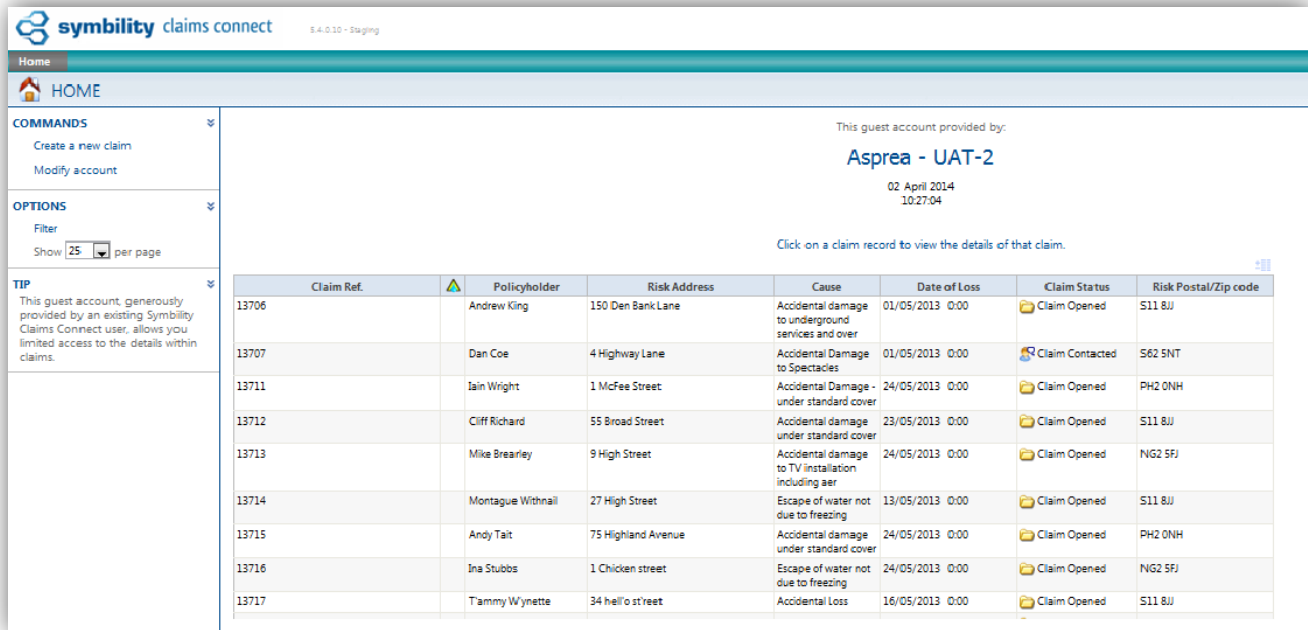



- On initial log on you will directed to set a permanent password for your account
- Click on Save to keep the changes

NOTE: The password you set will be shared by all users on your account. If it is incorrectly entered 6 times the account will be locked out and will need to be re-activated.

Your Claim List

The initial screen you see when you log on to Symbility is a list of your claims. Once you have found the claim you need click on it to open the claim screen.

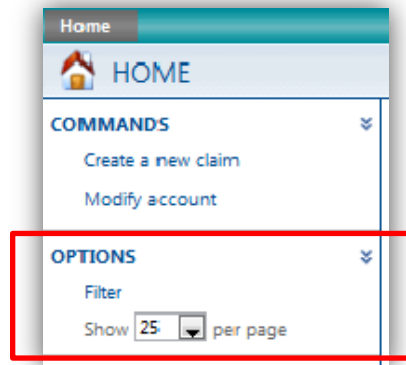


The screenshot shows the Symbility Claims Connect interface. At the top, there is a navigation bar with 'Home' and 'HOME' buttons. Below this, there are sections for 'COMMANDS' (Create a new claim, Modify account), 'OPTIONS' (Filter, Show 25 per page), and a 'TIP' section. The main area displays a table of claims with columns: Claim Ref., Policyholder, Risk Address, Cause, Date of Loss, Claim Status, and Risk Postal/Zip code. The table contains 10 rows of claim data.

Claim Ref.	Policyholder	Risk Address	Cause	Date of Loss	Claim Status	Risk Postal/Zip code
13706	Andrew King	150 Den Bank Lane	Accidental damage to underground services and over	01/05/2013 0:00	Claim Opened	S11 8JJ
13707	Dan Coe	4 Highway Lane	Accidental Damage to Spectacles	01/05/2013 0:00	Claim Contacted	S62 5NT
13711	Jain Wright	1 McFee Street	Accidental Damage - under standard cover	24/05/2013 0:00	Claim Opened	PH2 0NH
13712	Cliff Richard	55 Broad Street	Accidental damage under standard cover	23/05/2013 0:00	Claim Opened	S11 8JJ
13713	Mike Brearley	9 High Street	Accidental damage to TV installation including aer	24/05/2013 0:00	Claim Opened	NG2 5FJ
13714	Montague Withnail	27 High Street	Escape of water not due to freezing	13/05/2013 0:00	Claim Opened	S11 8JJ
13715	Andy Tait	75 Highland Avenue	Accidental damage under standard cover	24/05/2013 0:00	Claim Opened	PH2 0NH
13716	Ina Stubbs	1 Chicken street	Escape of water not due to freezing	24/05/2013 0:00	Claim Opened	NG2 5FJ
13717	Tammy Wynette	34 hell'o street	Accidental Loss	16/05/2013 0:00	Claim Opened	S11 8JJ

- The options in this screen are identified below:
 - Modify Account – this will allow you to reset your password at any time
 - Filter – Allows searching of your claims, also use this function to find closed claims as they are not shown by default
 - Show – Alter the number of records shown on 1 screen
 - Column selector (top right) – allows selection of data columns to show
 - Logout
 - Columns – by clicking on the column titles you can sort the order of the claims

- If you need to search for claims (you will need to use this option to find closed claims):



- Select the 'Filter' option on the left menu

The 'FILTER' dialog box contains the following fields: Claim reference, Policy number, Policyholder, Risk Address, Risk postal/zip code, Cause (dropdown), Claim status (dropdown), Date of loss (calendar range), and Claim creation date (calendar range). There is an 'Emergency' checkbox and 'Filter', 'Clear', and 'Cancel' buttons at the bottom.

- Search by any of the fields shown
- When using Policy holder name – fragments are also accepted i.e 'Smith'

The 'FILTER' dialog box is shown with the 'Claim status' dropdown menu open. The menu lists 10 selected options: Select All, Claim Opened, Claim Contacted, Claim Inspected, Claim in Progress, Claim at Repair, Claim Closed (repair), Claim Closed (cashed out), Claim Closed (repudiated), Claim Closed (cancelled), and Claim Reopened. 'Filter' and 'Cancel' buttons are visible at the bottom.

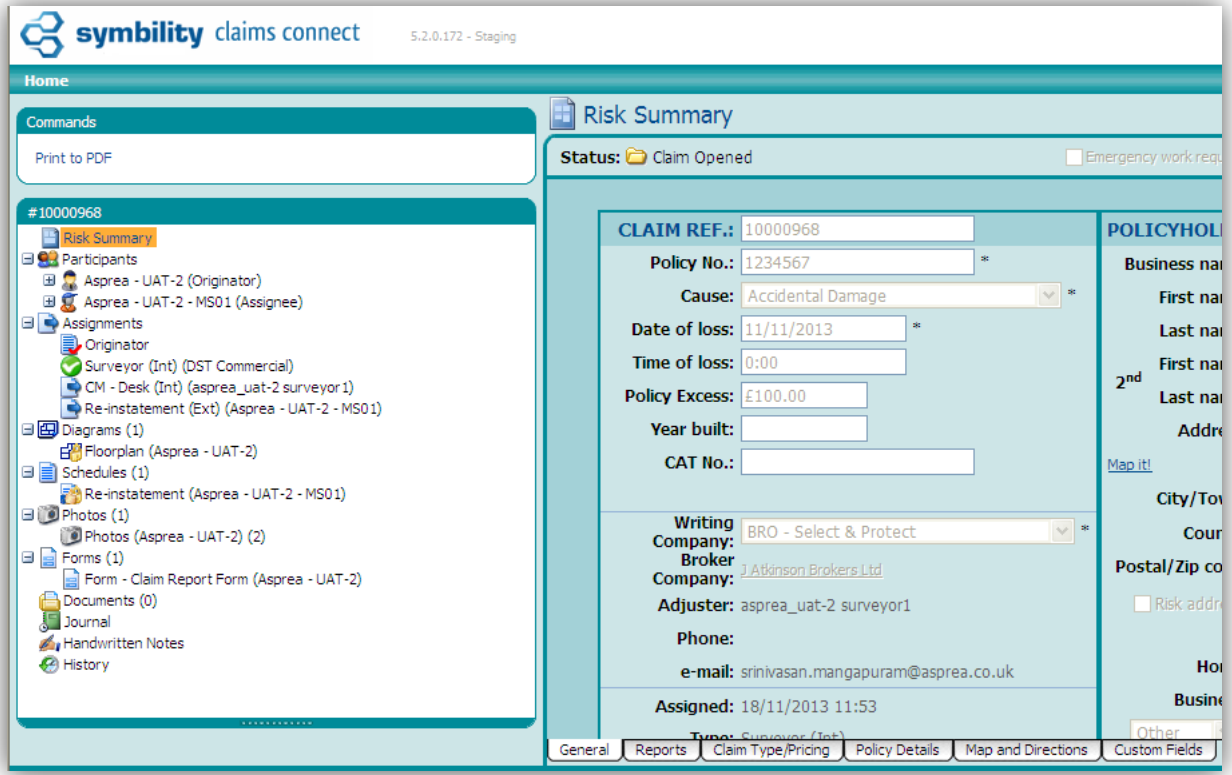
- When searching for closed claims ensure you select all the options in the Claim status dropdown including all the closed claim types

The Claim Screen

The claim screen will open in the risk summary and you have from here the access to all the information and progress on the claim.

- The options you have available are:

Home
 Commands
 Claim Explorer



Tabs

- **Home:** to go back to your claim list
- **Commands:** will change depending on what screen you are in, the only option on this screen is to print or PDF details of the claim
- **Claim Explorer:** allows you to navigate the claim, click on any option and that element will be displayed in the main area of the screen on the right
- **Tabs:** on the Risk Summary and any Schedule(s) you have additional tabs in the right of the screen

Using the Claim Explorer

The Claim Explorer allows you to navigate different elements of the claim by clicking on them in the claim explorer. The key sections for understanding claim ownership and progress are detailed below.

Risk Summary – all the claim and policy details plus any special instructions for the claim owner, the tabs along the bottom have further information

Diagrams – these will show any floorplan created by the surveyor used to scope work items

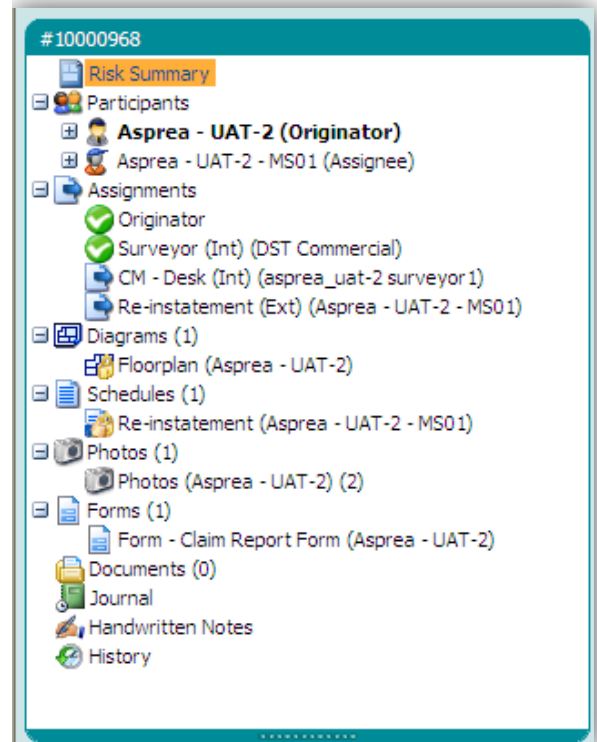
Photos – click to see what has been added to the claim

Forms – the claim report form will be completed by a Field or Desk surveyor when they scope up the job, other forms are added for special requirements eg Trace and Access, Asbestos Testing, etc

Documents – click to see what has been added to the claim

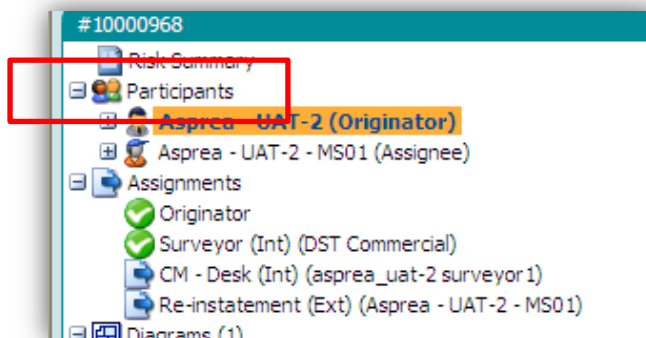
Handwritten Notes – not being used by Aviva/Asprea

History – you to view any changes made on a claim between given points in time



The other Claim Explorer options are detailed below:

PARTICIPANTS – will show you Aviva/Asprea users and any external Contractors involved in the claim:



- Click on the word Participant to view all users involved in the claim and their role

CLAIM #1000968 - PARTICIPANTS							
	Assignment	Company Name	Company Type	Assigned / Added	First Name	Last Name	Role
		Asprea - UAT-2	Insurance Company	18/11/2013	Jim	Atkinson	Agent (Claim Creator)
		Asprea - UAT-2	Insurance Company	18/11/2013	Jimbo	Atkinson	Guest - Broker
		Asprea - UAT-2	Insurance Company	25/11/2013	Rachel	Fenoughy	Ops Support
	CM - Desk (Int)	Asprea - UAT-2	Insurance Company	18/11/2013	asprea_uat-2	surveyor1	Primary Field Surveyor (Claim Contact)*
	Re-instatement (Ext)	Asprea - UAT-2 - MS01	Contractor	18/11/2013	Asprea	Admin	
	Re-instatement (Ext)	Asprea - UAT-2 - MS01	Contractor	18/11/2013	UK	Support	
	Re-instatement (Ext)	Asprea - UAT-2 - MS01	Contractor	18/11/2013	user	1	
	Re-instatement (Ext)	Asprea - UAT-2 - MS01	Contractor	18/11/2013	User	One	
	Re-instatement (Ext)	Asprea - UAT-2 - MS01	Contractor	18/11/2013	User	Two	
	Surveyor (Int)	Asprea - UAT-2	Insurance Company	18/11/2013	DST	Commercial	Desk Surveyor

- The **Claim Contact** is the current claim owner (this is shown in brackets in the role field after the user's primary role)

PARTICIPANT

General

Company name: Asprea - UAT-2

First name: Rachel

Last name: Fenoughy

e-mail: rachel.fenoughy@asprea.co.uk

Phone: (07800) 610666

Role: Ops Support

Primary adjuster for the claim

Claim contact

Notifications

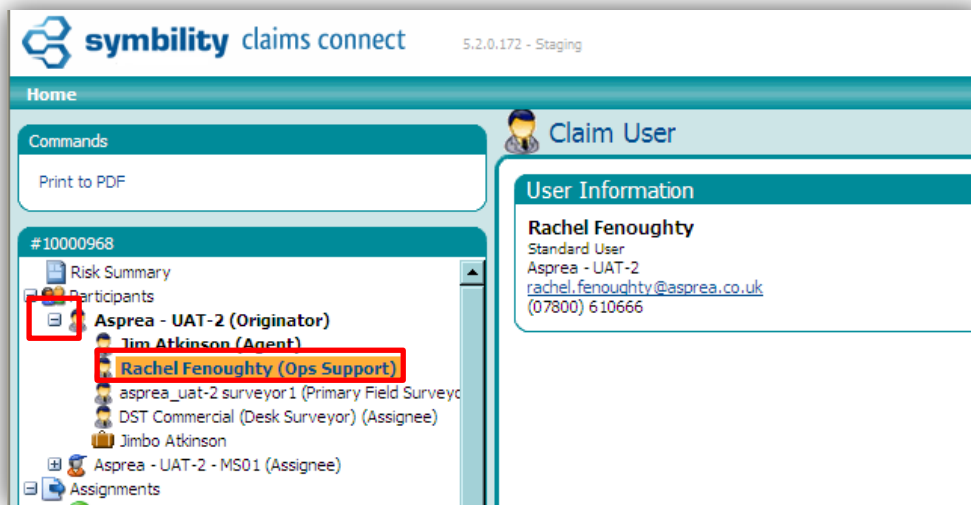
Ownership

Device: LA30501 [View claim ownership](#)

Since: 25/11/2013 17:11

- Click on any line and the contact details will appear

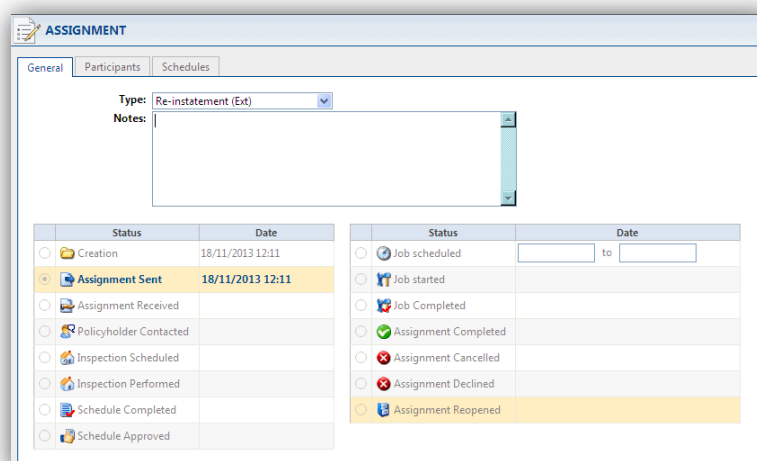
- You can also expand the participants section:



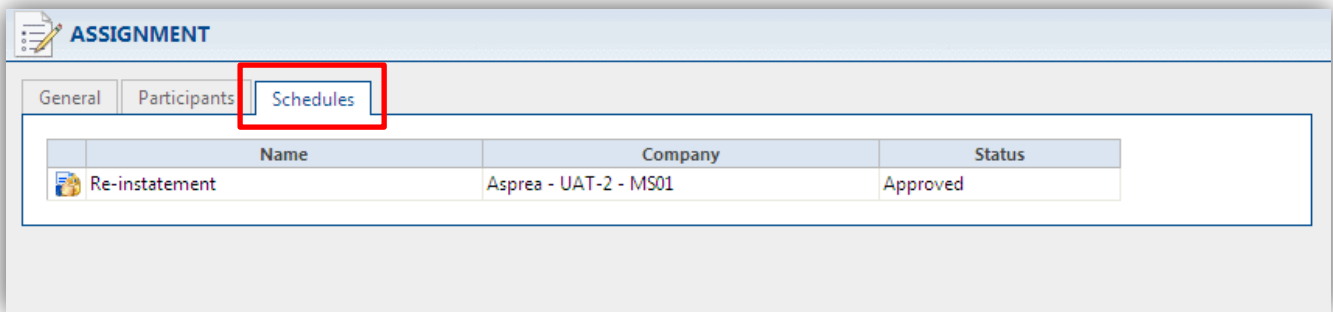
- Click on the + sign and select the user
- Their contact details will appear in the main screen
- NOTE:** this will not tell you who the current Claim Contact is

ASSIGNMENTS – will show all the Internal (Int) or External (Ext) assignments that have taken place on the claim:

- Internal:** the claim changes ownership from one internal user to another, the new assignee also becomes the Claim Contact and their name is attached to the assignment, the previous assignee completes their assignment
- External:** an assignment of a schedule of works for a contractor to carry out



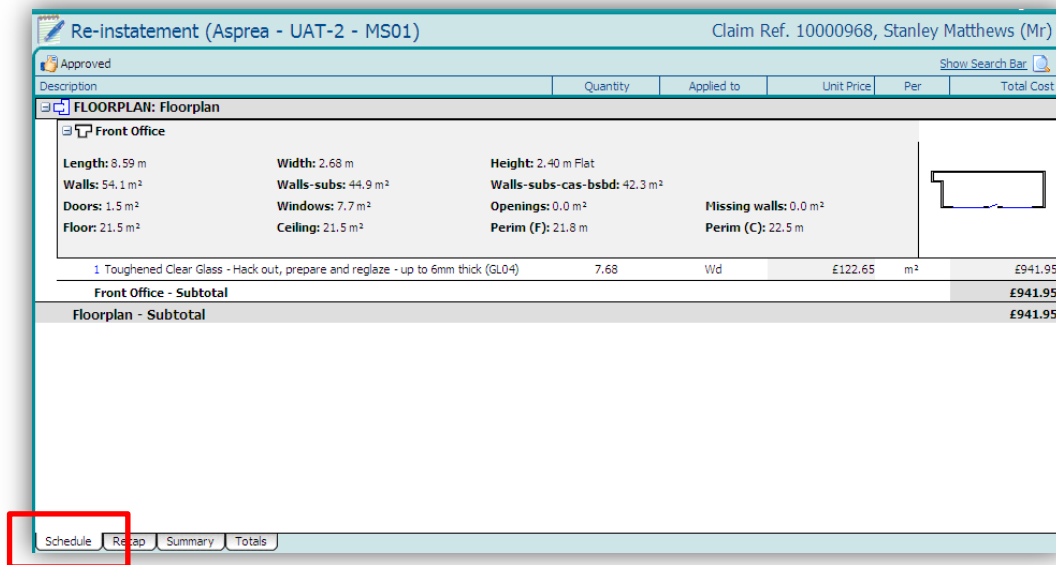
- Click on an assignment in the Claim Explorer to view the progress and current position of the assignment



- Click on the schedules tab to confirm the schedule included in this assignment

SCHEDULES – these will contain specific work items relating to the works required:

- **Reinstatement:** fulfilment works if the Asprea network of contractors are fulfilling the claim
- **Customer Cash:** used when a cash payment is being made to a customer
- **Specialist Works:** Trace and Access, Stripout, Emergency etc
- Click on the Schedule name and view the available tabs:



- **Schedule:** Each line item, quantities and costs for each room or area within the floorplan and a total of the line item costs

NOTE: the **Recap** and **Summary** tabs show a breakdown of the costs

Re-instatement (Asprea - UAT-2 - MS01) Claim Ref. 10000968, Stanley Matthews (Mr)

Approved [Configure Totals Page Layout](#)

Total Materials:	£745.50
Total Labour:	£196.45
Schedule Subtotal:	£941.95
Total Coverage Buildings:	£941.95
Amount Payable on Coverage Buildings:	£941.95
Schedule Total:	£941.95

[Finalisation](#)

Schedule Recap Summary **Totals**

- **Totals:** The overall total for the schedule

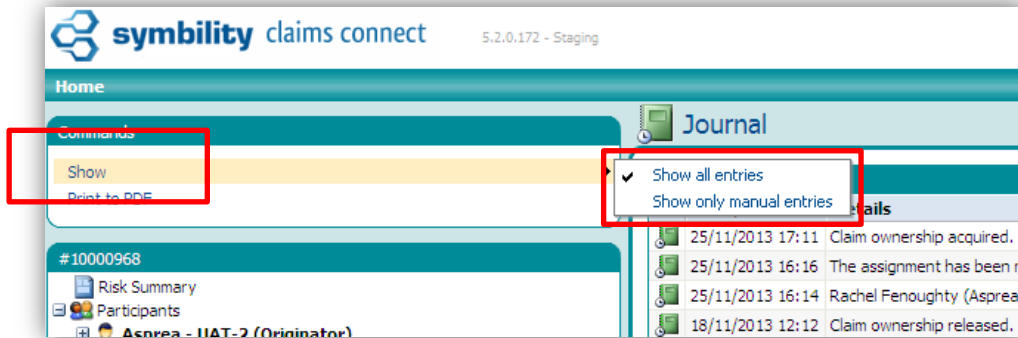
NOTE: THE Totals tab will also include any additions or subtractions that have been made only on Cash Settlements eg deduction of excess, addition of VAT

JOURNAL – an audit trail of manual and system generated notes showing the progress of the claim

Journal Claim Ref. 10000968, Stanley Matthews (Mr)

Date/Time	Details	Author
25/11/2013 16:16	The assignment has been marked as completed.	Rachel Fenoughty/Asprea - UAT-2
25/11/2013 16:14	Rachel Fenoughty (Asprea - UAT-2) added as a new participant (Ops Support).	Rachel Fenoughty/Asprea - UAT-2
18/11/2013 12:12	Claim ownership released.	Jim Atkinson/Asprea - UAT-2
18/11/2013 12:12	Schedule has been approved and sent to the supplier for fulfilment	Jim Atkinson/Asprea - UAT-2
18/11/2013 12:11	Estimate "Re-instatement" (Asprea - UAT-2 - MS01) has been approved (assignment "Re-instatement (Ext)").	Jim Atkinson/Asprea - UAT-2
18/11/2013 12:11	Claim assigned to Asprea - UAT-2 - MS01. ----- Assignment Type: Company Group Used: Main Supplier Schedule(s) Used: Re-instatement Secondary Coverage Considered: No Re-pricing Method Used: Re-pricing original Order: Lowest price first Original Schedule(s) Price: £941.95 ----- Revised Schedule(s) Price: £941.95 Used Recommended Supplier: Yes Reason for not using recommended supplier: ----- Assignment Notes: ----- Considered Suppliers: 1 Asprea - UAT-2 - MS01 88% £941.95 Primary	Jim Atkinson/Asprea - UAT-2
18/11/2013 12:11	User Two (Asprea - UAT-2 - MS01) added as a new participant (assignment "Re-instatement (Ext)").	Jim Atkinson/Asprea - UAT-2
18/11/2013 12:11	User One (Asprea - UAT-2 - MS01) added as a new participant (assignment "Re-instatement (Ext)").	Jim Atkinson/Asprea - UAT-2
18/11/2013 12:11	Asprea Admin (Asprea - UAT-2 - MS01) added as a new participant (assignment "Re-instatement (Ext)").	Jim Atkinson/Asprea - UAT-2

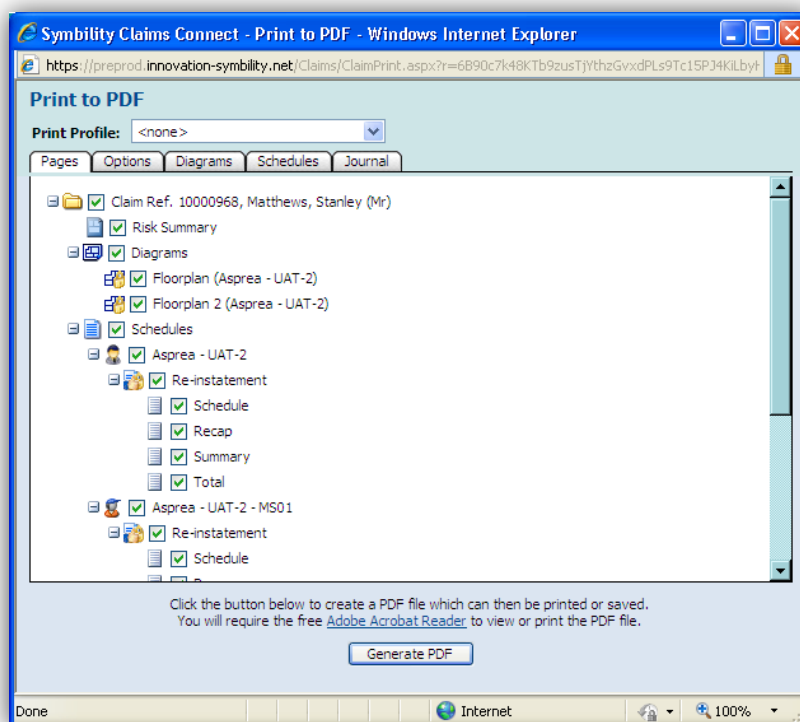
- The author is the user that has added the note or completed the action in the system



- When you are in the journal view you have a command that allows you to switch between all or just manual entries

Print to PDF

The **Print to PDF** Command allows you to print and PDF any elements of the claim you need to view or save.



- Tick to select the elements of the claim you require
- Select PDF
- Follow the Adobe Acrobat functions to print or save