

iLog Procedures

Guidelines for Inputting Status Notes

Locating iLog and entry

Claim Details

The claim and information is retrieved from policy systems (SFA/SKINC/CAS) depending on the account. Data as of 05/16/2007 09:15:24 PM

Claim Information

Claim#	187557 - PLA	Status:	OPEN	CAT:	Other
Claim Category:	N/A	Loss Assessment:	Yes		
Date Of Loss:	04/22/2006	Loss Reported:	04/06/2006	Cause Of Loss:	Explosion - Machinery
Date Closed:	N/A	Service Assignment:	Lizdens Loss Track		

Loss Description:

Loss Description: Training Learning


Policy Information

Policy#	TR1H025080	Policy Form:	408	Policy Type:	RESIDENTIAL
Fluor Carrier:	N/A				
Insured:	0 Jan 1 Traini 00001				
Insured Address:	000 Miss ss op 1st 00000, RI 00000				

Prior and Associated Claims [Show](#)

Click on Show link to view Prior and Associated Claims

Claim Items

Claim Item#	Severity	AML	Deductible	Coverage A	Coverage B	Coverage C	
1		N/A	Ex Wind	1,170,000	0,000,000	0,500,000	

Involved Parties of Claim Items

Claim Item# 1 -- State: ILLD UPLN

Party Type	Name	Role	Extension	Entity	Start Date	Status
Owner	l.e.adjuster	adjuster		LAI Operations	05/25/2007	
Member	l.e.adjuster	adjuster		LAI Operations	05/25/2007	Active

Assignment History [Show](#)

Click on Show link to view Assignment History

Diary Items [Create](#) [Show](#)

Click on Show link to view Diary Items

iLog entries

CITIZENS **Claims Tracking System (CTS)**

Setup Search Desktop Preferences Recent Clicks Log Off Help

iLog Details Adjuster Two • AdjustersRus • Adjuster

Claim Details

Claim#	107393 • PLA	Status:	REOPEN	CAT:	Katrina
Policy#	FRJH0094992	Policy Form:	HO3	Policy Type:	RESIDENTIAL
Insured:					
Insured Address:		Home:			

iLog Summary

The following is a list of iLog entries entered for this claim in CTS system. NOTE: This list does not include journal entries entered in the policy systems (ePAS/eWind).

[Add an iLog Entry](#)

Activity Entered By:	Entered On:	Activity:	Activity Started:	Activity Completed:
Adjuster Two	01/05/2007 8:04 AM	Journal	01/05/2007	01/05/2007
Adjuster Two	01/05/2007 8:04 AM			
		NI said some choice words so i said some choice words.		
Adjuster Two	01/05/2007 8:03 AM	First Contact	01/05/2007	01/05/2007
Adjuster Two	01/05/2007 8:03 AM			
		Called NI ho# and lm		
Adjuster Two	01/05/2007 8:02 AM	Journal	01/05/2007	01/05/2007
Adjuster Two	01/05/2007 8:02 AM			
		I did not like NI tone of voice so I let her have the dial tone. See how she like that tone.		

iLog entry

CITIZENS
PROPERTY INSURANCE CORPORATION

Claims Tracking System (CTS)

Setup Search Desktop Preferences Recent Clicks Log Off Help

Add ILog Adjuster Two ♦ Ad

Enter iLog

In order to complete or close an activity please enter an end date and click save & close Activity.

* **Activity Start Date:** 01/26/2007 **1**

Activity End Date: 01/26/2007

* **Activity :** First Contact **2**

* **Performed By :** Adjuster Two -- AdjustersRus -- Adjuster **2**

Confidential

Note: Not exceeding 2000 letters.

Called spoke with Mr. Insured set appointment for Sat. 1/30/07 @ 2PM **3**

You have 1992 characters remaining for your description

Save & Continue adding comments **Save & Close the activity** **4**

Notification of Assignment

- I Upon receipt of file, verify:
 - § Policy type
 - § Facts of loss
 - § Indicate any prior claims that may affect current loss
 - § If there are priors, explain settlement
 - § Verify that the current policy is in effect

Steps to Document File Activities

I Contact

- § Always note first contact and any subsequent contact activity.
- § Explanation of first contact attempt.
- § Note the name of the person you spoke with in the file.
- § Update all activity in file within 24 hours.
- § If you touch the file, note any activity you've done on that file.

Steps to Document File Activities, Cont'd.

I Communication

- § Gather as much info as possible during first call and document it.
- § Verify address, mortgage, contractor or Public Adjuster involved and document their information (name and phone).
- § Advise caller what course of action is being taken; including, set appointment time, advised to call back 2 days, etc. Note if left voice mail.
- § Advise if contacted, request for info, or any other letter that is to be mailed.

Steps to Document File Activities, Cont'd.

- | Investigation
 - § Document brief description of inspections.
 - § Note who conducted inspection (policy holder, contractor, or Public Adjuster).
 - § Note date and time of inspection
- | Coverage confirmed
- | Issues identified

Steps to Document File Activities, Cont'd.

I Inspection

- § Always note results of inspection
- § Note discussions on scope; whether agreed to or not.

Estimate

- | Always recap discussions of estimate with insured.
- | Agreed /Disagreed on amount of depreciation being taken
 - § Note agreement/disagreement on scope of damages
 - § Always provide recap of the dollar figure established to date. Provide brief Statement Of Loss in iLog
 - § Always list any special circumstances
 - § Availability of material
 - § Availability of repair personnel
 - § Reasons for any lack of communication

Submission of File for Further Handling

- | Identify who you finalized the claim with.
- | State what agreement was made, including any recommendations.

Additional or Supplemental Activities

- | Note who initiated the additional activity.
- | Explain what the additional activity involves.
- | List any action plan to resolve the additional activity.
- | Explain reason for additional activity or a request for re-inspection/reopen.
- | Give details of your course of action at this present time.

iLog Bloopers

	Activity Entered By: Adjuster Two	Entered On: 01/05/2007 8:00 AM	Activity: Journal
	Journal Entered By: Adjuster Two	Entered On: 01/05/2007 8:00 AM	

Spk to ni gave no info regarding claim

Suggested entry:

Spoke to Named Insured; gathered facts regarding claim.

iLog Bloopers



Activity Entered By:

Adjuster Two

Entered On:

01/05/2007 8:01 AM

Activity:

Journal



Journal Entered By:

Adjuster Two

Entered On:



01/05/2007 8:01 AM

NI stated he didn't no which hose was damage.

Suggested entry:

Named Insured stated he does not know which house is damaged.

iLog Bloopers

	Activity Entered By: Adjuster Two	Entered On: 01/05/2007 8:02 AM	Activity: Journal
	Journal Entered By: Adjuster Two	Entered On: 01/05/2007 8:02 AM	
	I d;d not like NI tione of voice so I let her have the dial tone. See how she like that tone.		

Suggested entry:

Named Insured not cooperative. Stated that we are trying to resolve the issues and that cooperation will keep the process moving smoothly.

iLog Bloopers



Activity Entered By:
Adjuster Two

Entered On:
01/05/2007 8:03 AM

Activity:
First Contact



Journal Entered By:
Adjuster Two



Entered On:
01/05/2007 8:03 AM

Called NI ho# and lm

Suggested entry:

Called Named Insured home # and LVM (left voice mail)

iLog Bloopers

	Activity Entered By: Adjuster Two	Entered On: 01/05/2007 8:04 AM	Activity: Journal
	Journal Entered By: Adjuster Two	Entered On: 01/05/2007 8:04 AM	

NI said some choice words so i said some choice words.

Suggested entry:

Named Insured used profanity. Stated to NI that his language is not acceptable, requested they stop or will have to disconnect the call.

iLog Do's and Don'ts

- | Always state the facts in the file
- | Concise and pertinent subject matter
- | Summarize topic of conversation
- | No derogatory language
- | No opinions
- | Provide Detailed explanations



Ilog is one of the systems used to enter notes on claims. Please keep in mind that any notes entered in the system is part of the record and subject to discovery in a legal action. All files must be surrendered if subpoenaed by the court.

REMEMBER

- Always state the facts simply and clearly.
- Be concise and include only pertinent subject matter
- Summarize topics of conversation
- No derogatory language
- No opinions
- Detailed explanations
- Do not let your feelings show

Basic guidelines for ilog notes:

- § Always note first contact and any subsequent contact including name of contact.
- § Verify risk address and insured's address (if different), verify mortgage, verify contractor or Public Adjuster involved and document their information (name and phone).
- § Update all activity in file within 24 hours.
- § Every time you touch the file, note any activity you do on that file.
- § Gather as much info as possible during each contact and document it.
- § Make note of any issues identified.
- § Always list any special circumstances; such as, availability of material and repair personnel.
- § Reasons for any lack of communication.
- § Note details of your course of action at this present time.
- § Explain reason for additional activity or a request for re-inspection/reopen.
- § If you abbreviate, please use commonly accepted abbreviations so that others can read the notes.

Some examples of iLog notes and suggested revised notes:

Original iLog note:

I did not like Named Insured tone of voice so I let her have the dial tone.
See how she like that tone.

More effective iLog entry:

Named Insured not cooperative. Stated that we are trying to resolve the issue and cooperation will keep the process moving smoothly.

Sample entry:

Named Insured said some choice words so I said some choice words.

Bettered stated note:

Named Insured used profanity. Stated to Named Insured that profane language not acceptable. Request that they stop or call will have to be disconnected. Then state if call had to be disconnected or Named Insured ended the behavior.

Sample iLog note:

Spk to ni. Gave no info regarding claim.

More clearly noted entry:

Spoke to Named Insured; gathered facts regarding claim.

Example of abbreviated entry:

Called NI ho# and Im.

Improved abbreviated notes:

Called NI hm # and LVM.