XACTWARE®

Contents Collaboration

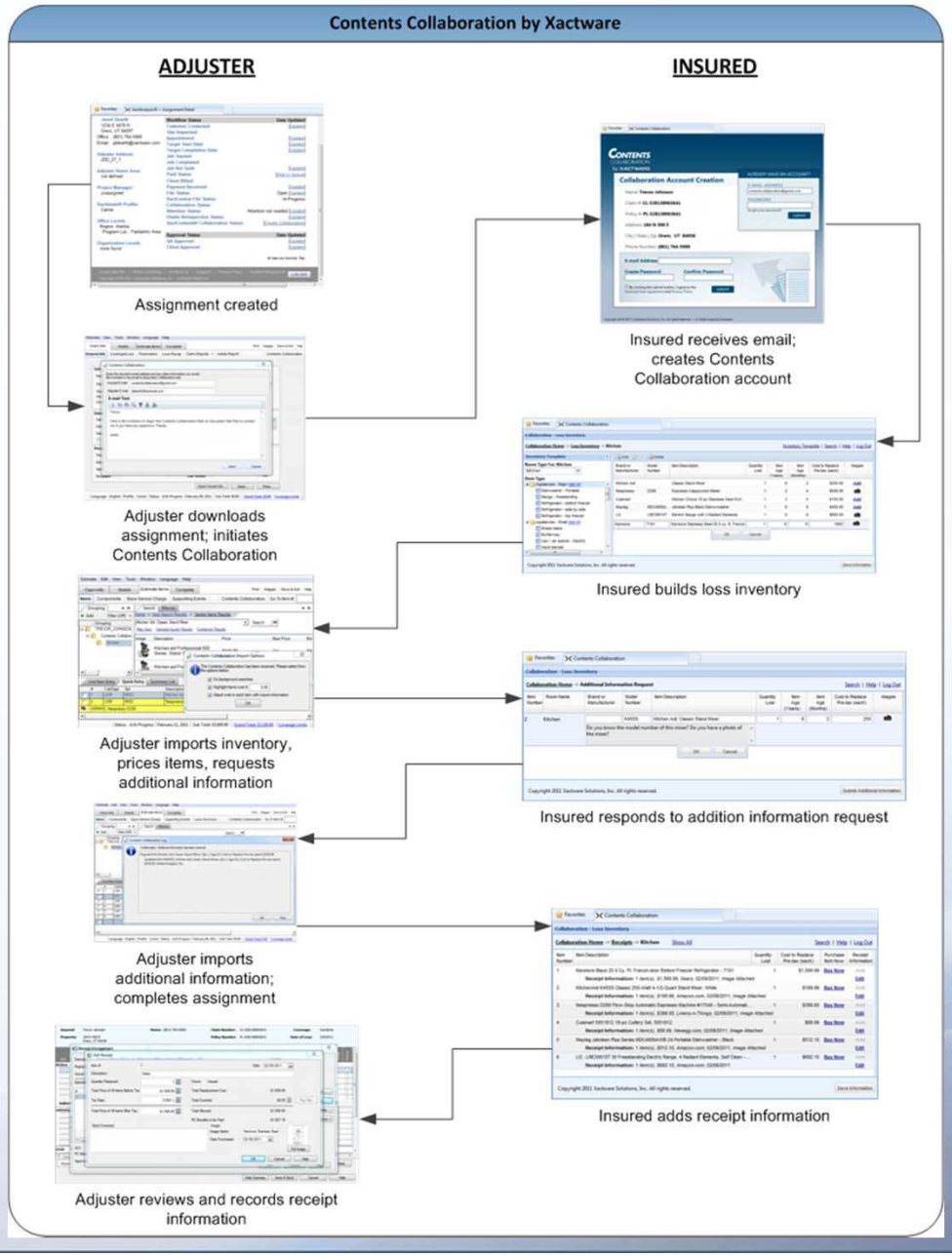
“The best way to be made whole again”

Current Process Today

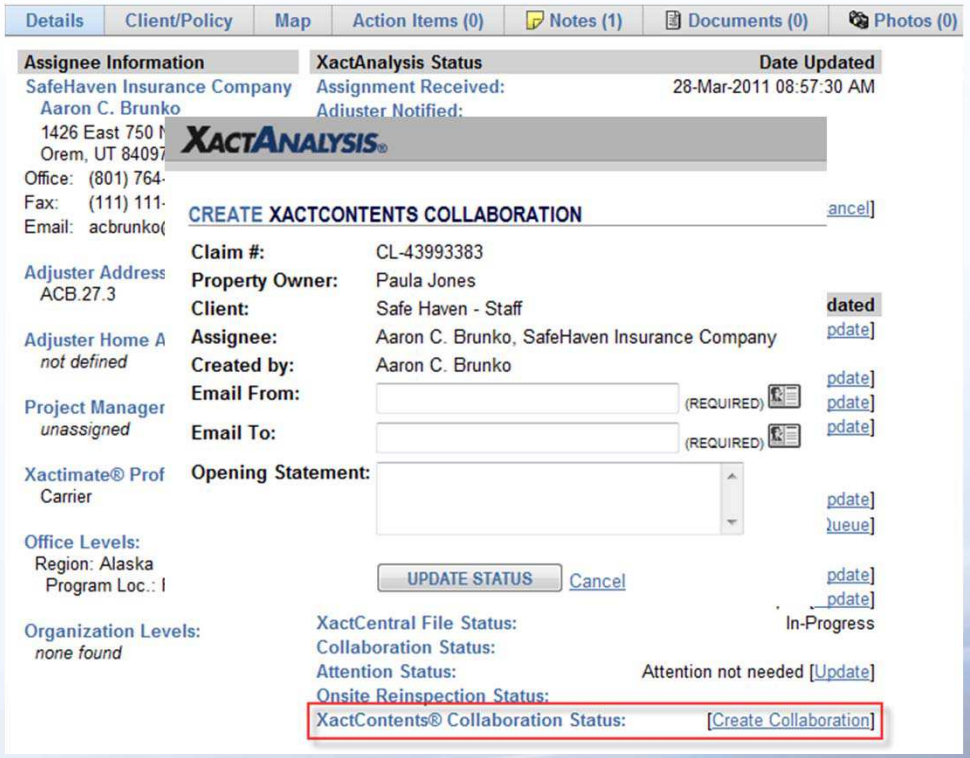
- Challenges of Inventory Capture Using Excel Import Template
  - Adjuster has to transfer document to insured
    - Does the insured know how to download/upload attachments?
  - Is the latest import template being used?
  - Does insured have Excel?
  - How to capture additional detail on specific items?
  - How to submit “forgotten” items?
  - Cannot show state-specific fraud language easily
  - Document submission history
  - Template customization
  - Column customizations
  - Company header/logos

Process with Contents Collaboration

- Benefits of Inventory Capture Using Contents Collaboration
  - Reduces cycle time while increasing customer convenience
  - Secure, online portal purpose-built for inventory capture
  - Fully customizable
  - Room templates
  - Saves all insured submissions and stores in XactAnalysis
  - Easy to use - Walks insured through entire claim process
  - Allows for multiple inventory submissions
  - Facilitates additional information requests
  - Allows insured to upload images, receipts and documents
  - Can define state specific fraud language
  - Notifications are sent to both the adjuster and insured when new content is available
  - Insured has access to prior claim history
  - Adjusters can “publish” reports to site
  - “Buy Now” link allows insured to purchase items priced by adjuster
  - Insured can enter actual replacement cost values – links directly with Payment Tracker

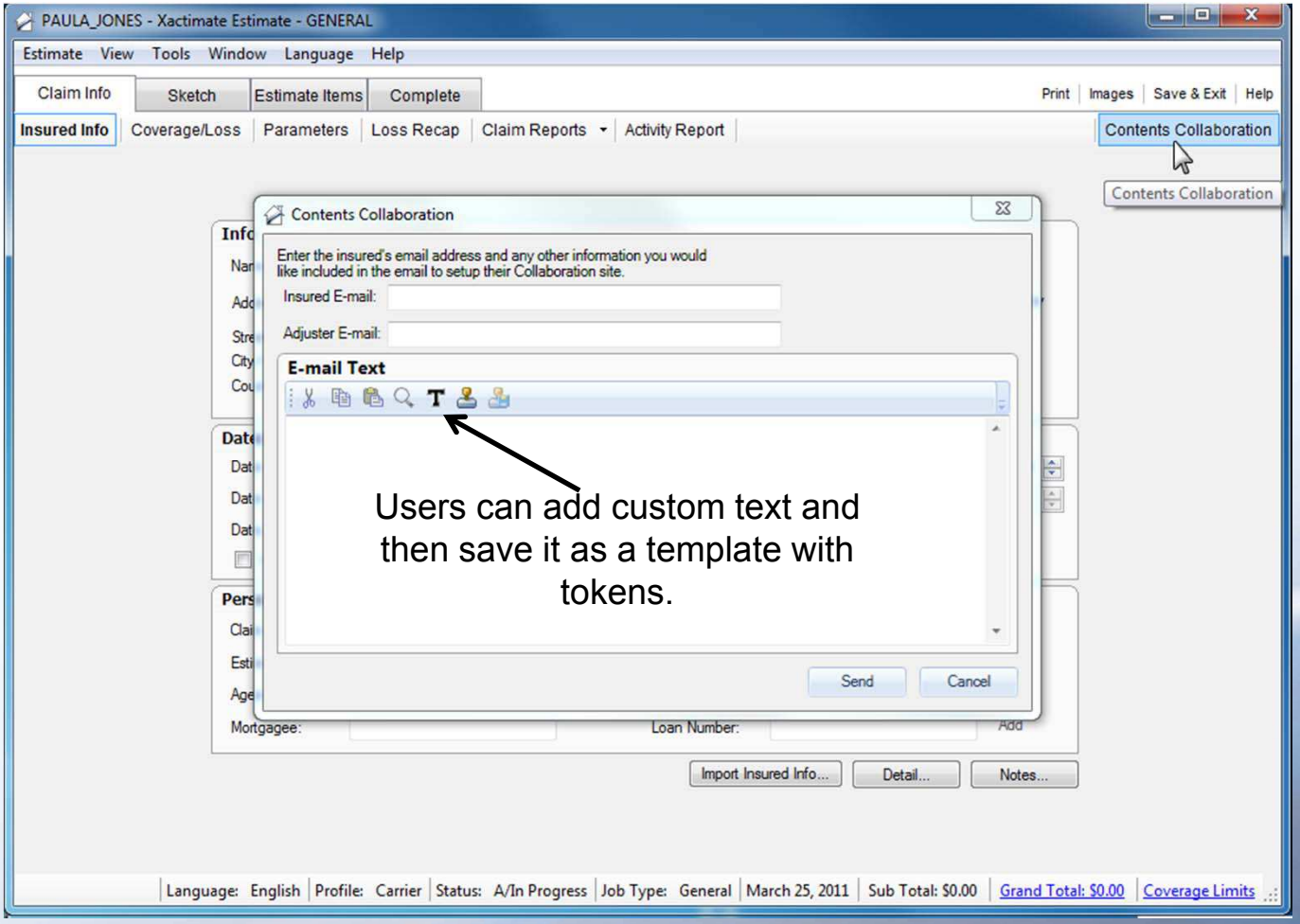

Contents Collaboration by Xactware
ADJUSTER
INSURED
Assignment created
Insured receives email; creates Contents Collaboration account
Adjuster downloads assignment; initiates Contents Collaboration
Insured builds loss inventory
Adjuster imports inventory, prices items, requests additional information
Insured responds to addition information request
Adjuster imports additional information; completes assignment
Insured adds receipt information
Adjuster reviews and records receipt information

- Initiate the collaboration from XactAnalysis at any point in time.
  - Allows the insured to start inventorying immediately
  - Track whether or not the collaboration has been started
  - In some cases, the inventory can be ready before an adjuster is assigned
  - EDI Initiation coming in 2011 Q2 release



Initiate from XactContents

- Gives the adjuster the control of deciding if and when to start the Contents Collaboration
- Users must be connected to the Internet to initiate a Contents Collaboration



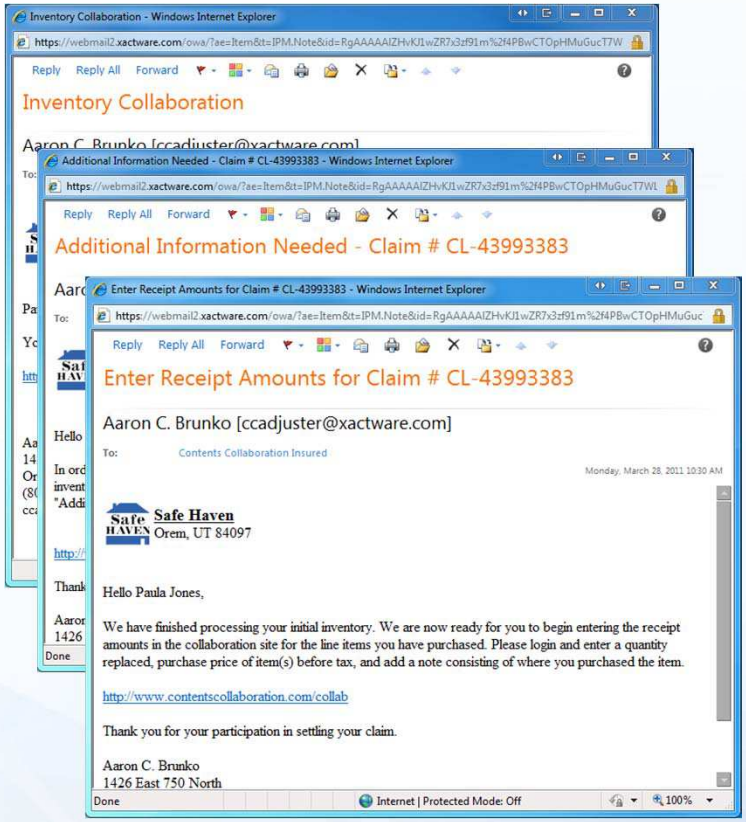
Continuous e-mail notifications

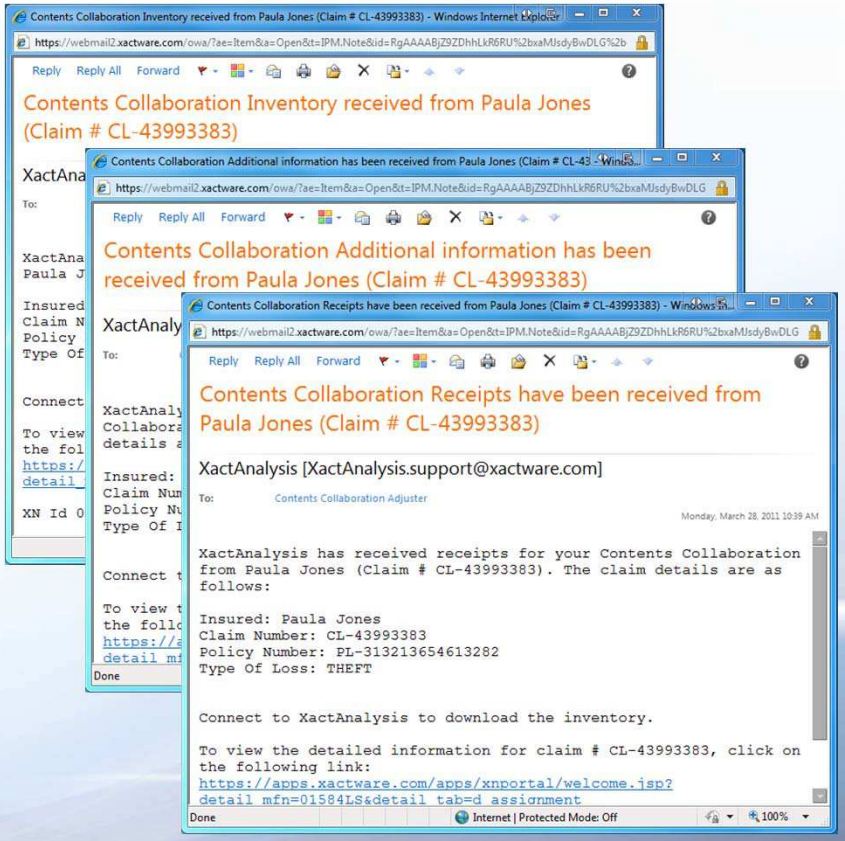
Insured Notifications:

Collaboration Generation
Additional Information Needed
Replacement Cost Benefits

Adjuster Notifications

Inventory Submitted
Additional Information Submitted
Receipt Information Submitted

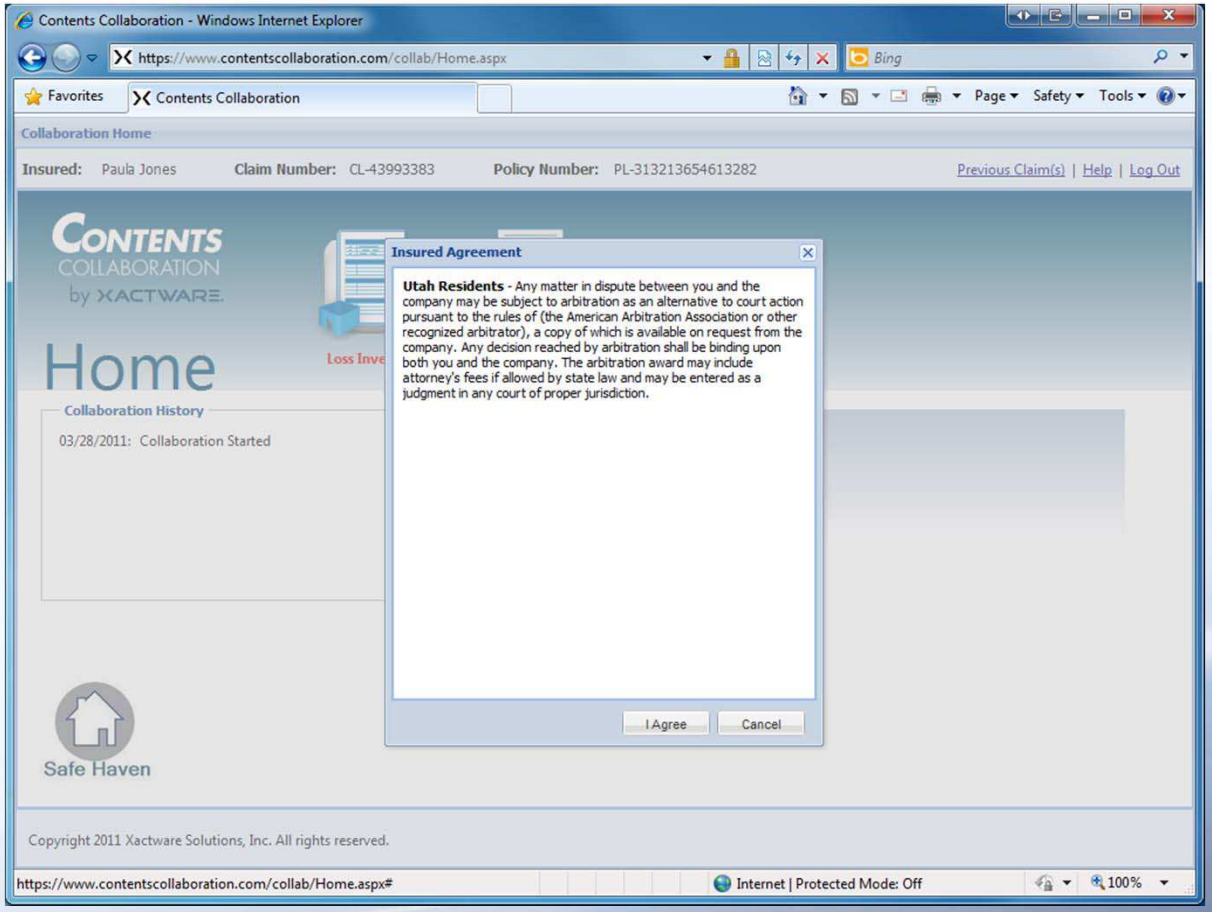




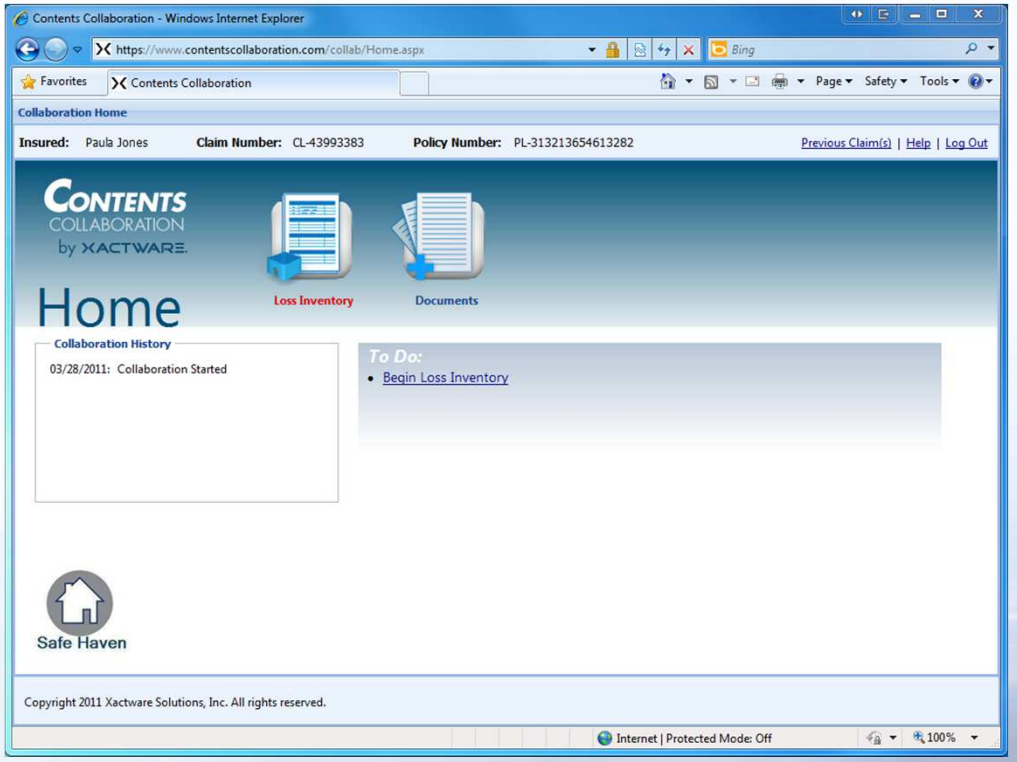
Collaboration Account Creation

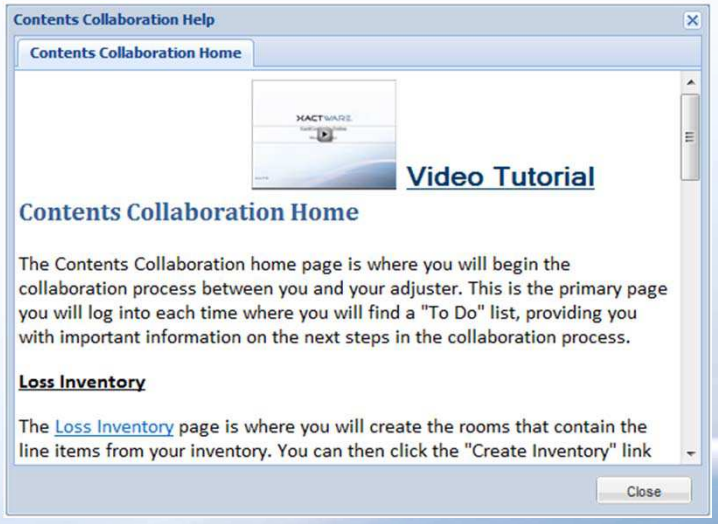
- Insured information displayed – adding credibility to site
- Insured able to create an account to log into for each stage of the claim
- Also designed to work in an iFrame to appear seamless to the insured
- Accessible by multiple internet browsers

- **Insured Agreement – Opening Statement (or Fraud Language)**
  - Can be displayed on first login, inventory submission (at any point in time), additional information submission, and receipt submission
  - Agreement stored for later access by carrier



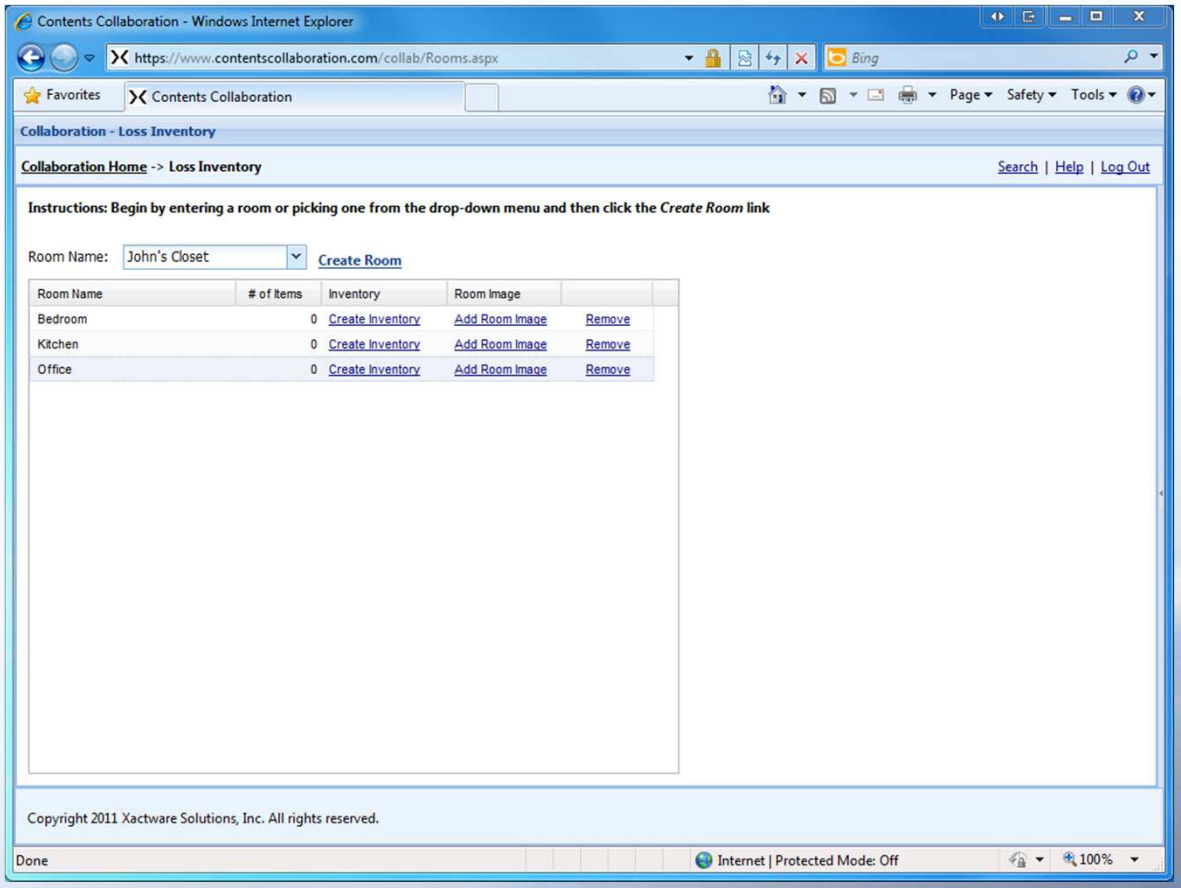
- **Easy to Navigate**
  - Icons show up in Red when the insured needs to perform an action
  - To Do: Section helps insured know where they need to go
  - Real Time Training accessible by clicking Help
    - RTT based on where the user is presently at in the application
  - Video helps available to the insured





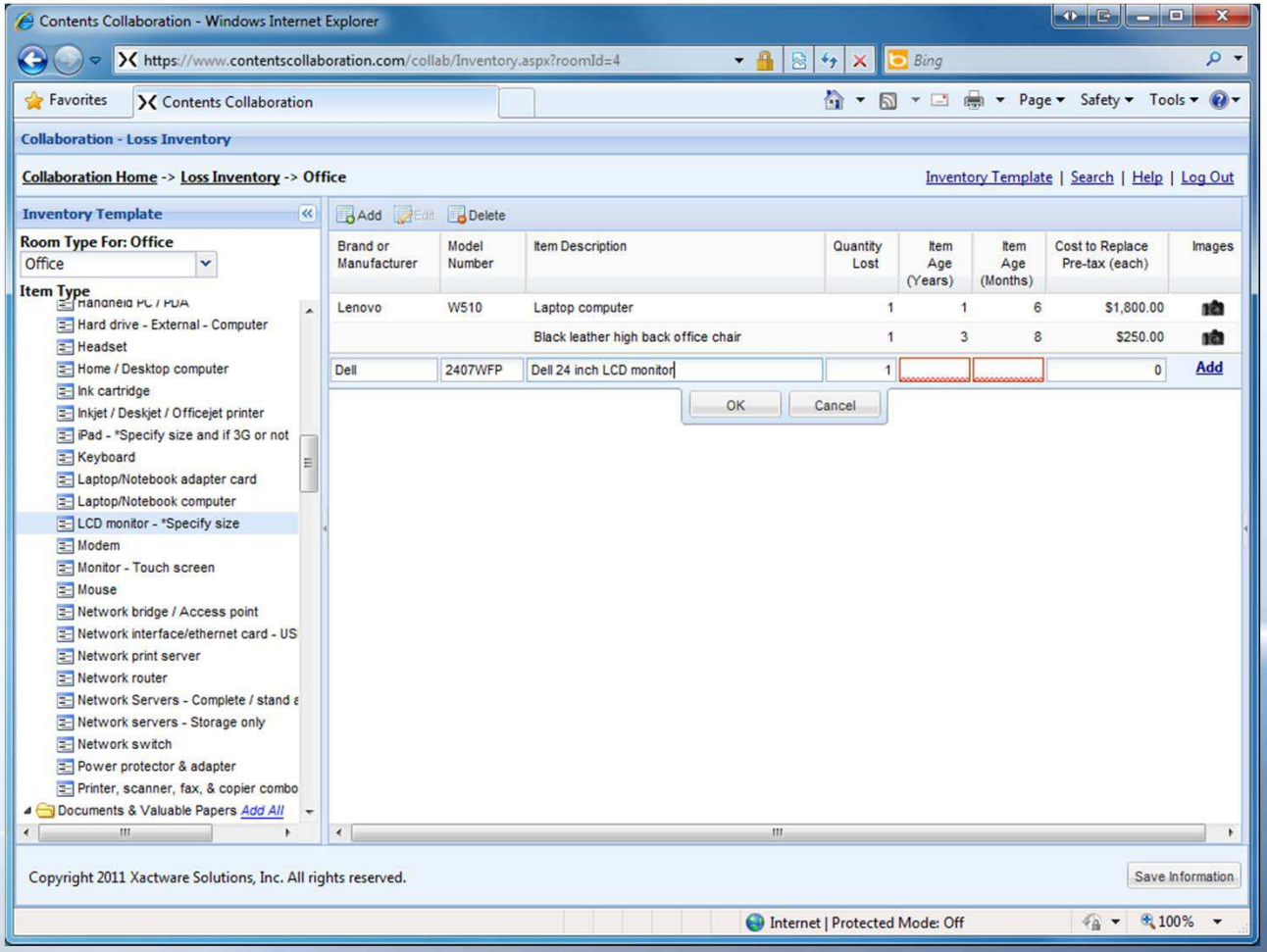
Room/Grouping Creation

- Easily create grouping elements (rooms) by typing or picking from a list
- Attach images for each room if available
- Show how many items exist in each room
- Create Inventory specific to room



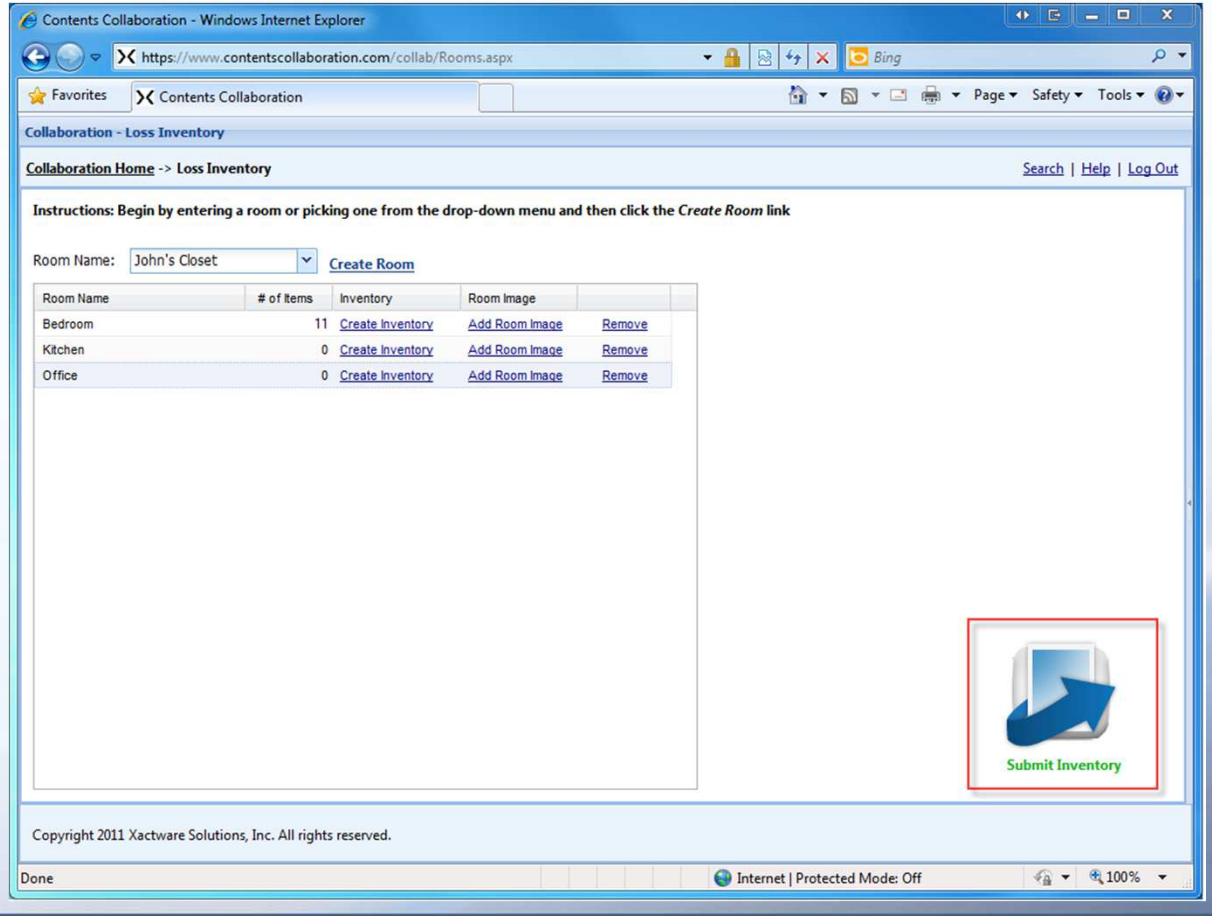
Inventory

- Continuously add items by entering information and pressing enter or clicking OK
- Pick items from a template – automatic item categorization
  - Columns can be:
    - Ordered
    - Renamed
    - Hidden
  - Changes take place immediately
  - Items automatically saved
  - Insured able to add images to items
  - Navigate back to rooms by clicking Save Information or by clicking Loss Inventory in the navigation bar



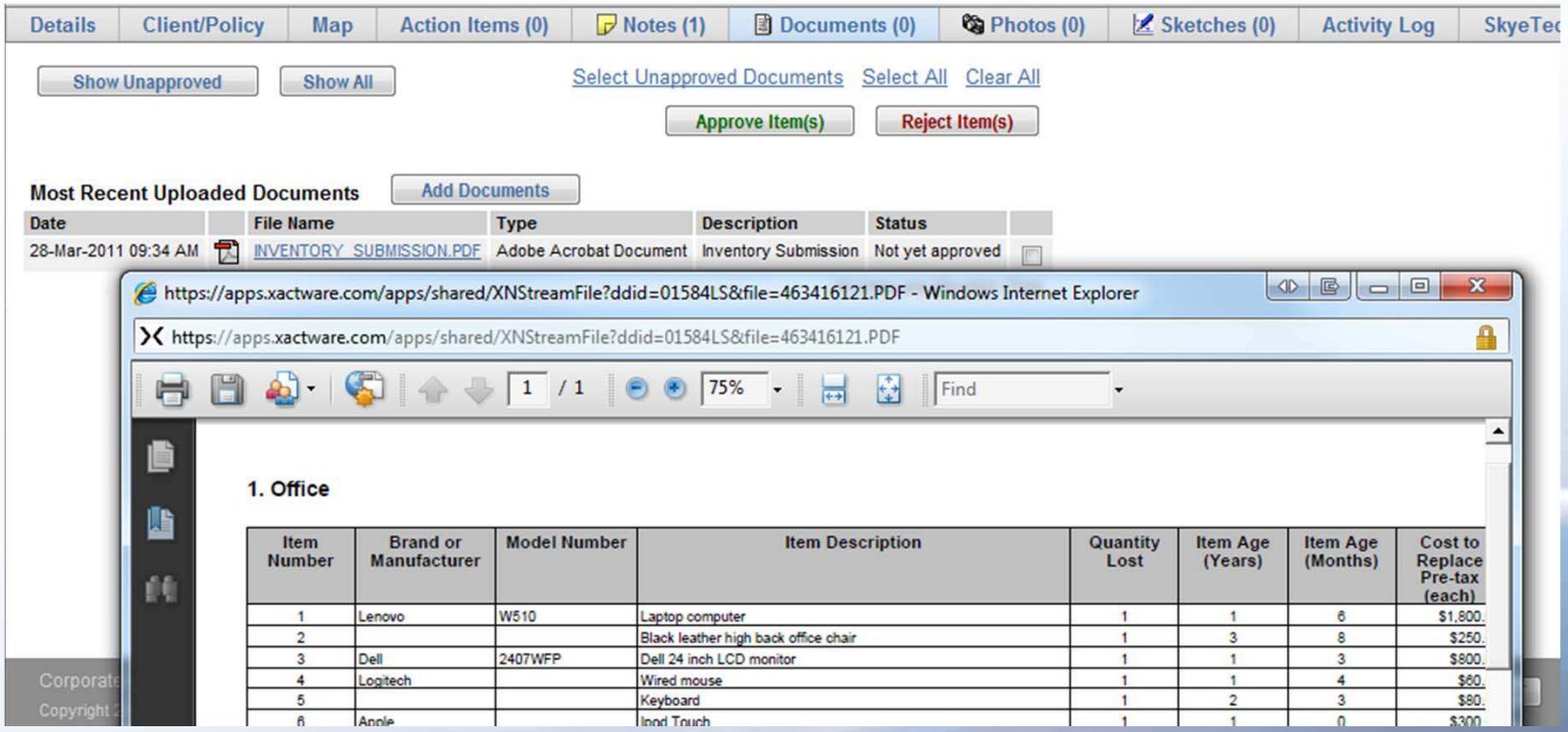
Inventory Submission

- Performs a check to make sure the insured filled out all required information
- Opening statement agreements displayed
- Inventory is hidden from insured and sent down to the adjuster
- Insured can add supplemental items if needed



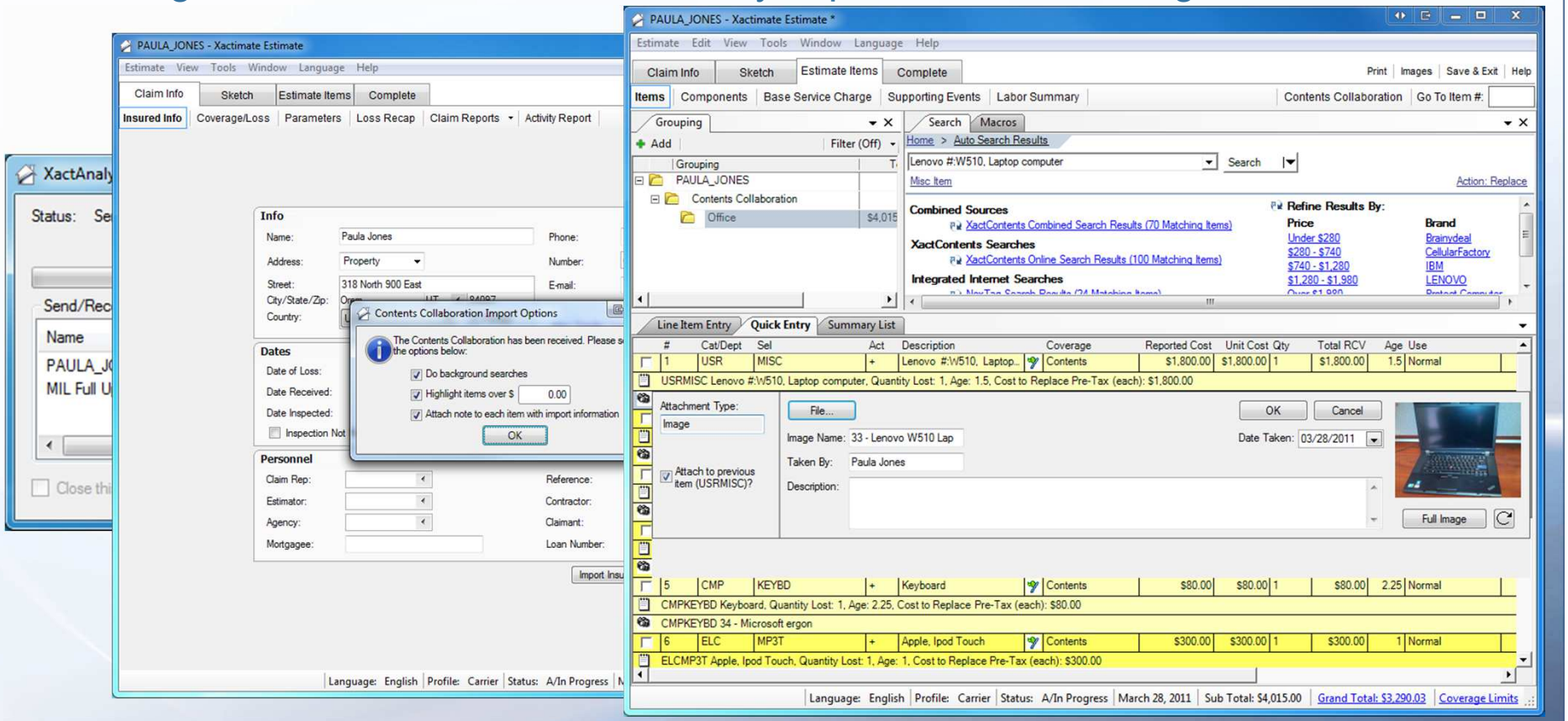
Original Inventory - XactAnalysis

- Original information stored in XactAnalysis
  - Searchable PDF
  - Printable PDF
- Stores original information which cannot be modified



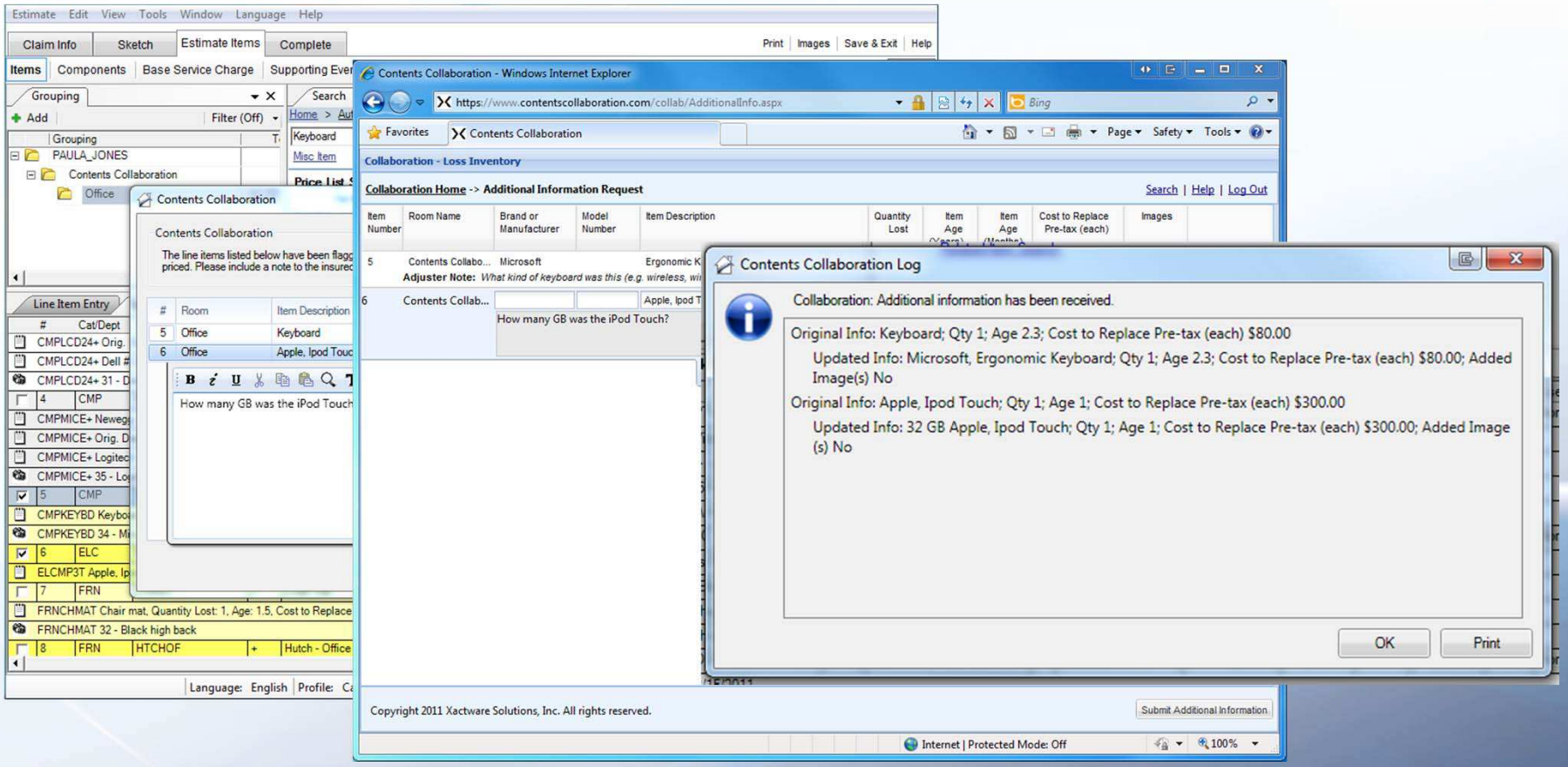
Inventory download to XactContents

- Adjuster is notified that the inventory is ready
- Connects to XactAnalysis to download the inventory
- Inventory Import options when opening the estimate
- Similar to the Import from Excel Option today
- Images and Documents automatically imported into the Assignment



Questions, More Info Needed?

- Check the items you need more information on
- Click XactContents Collaboration to request additional information
- Add a note consisting of the information you need
- Notifications take place for both the insured and the adjuster

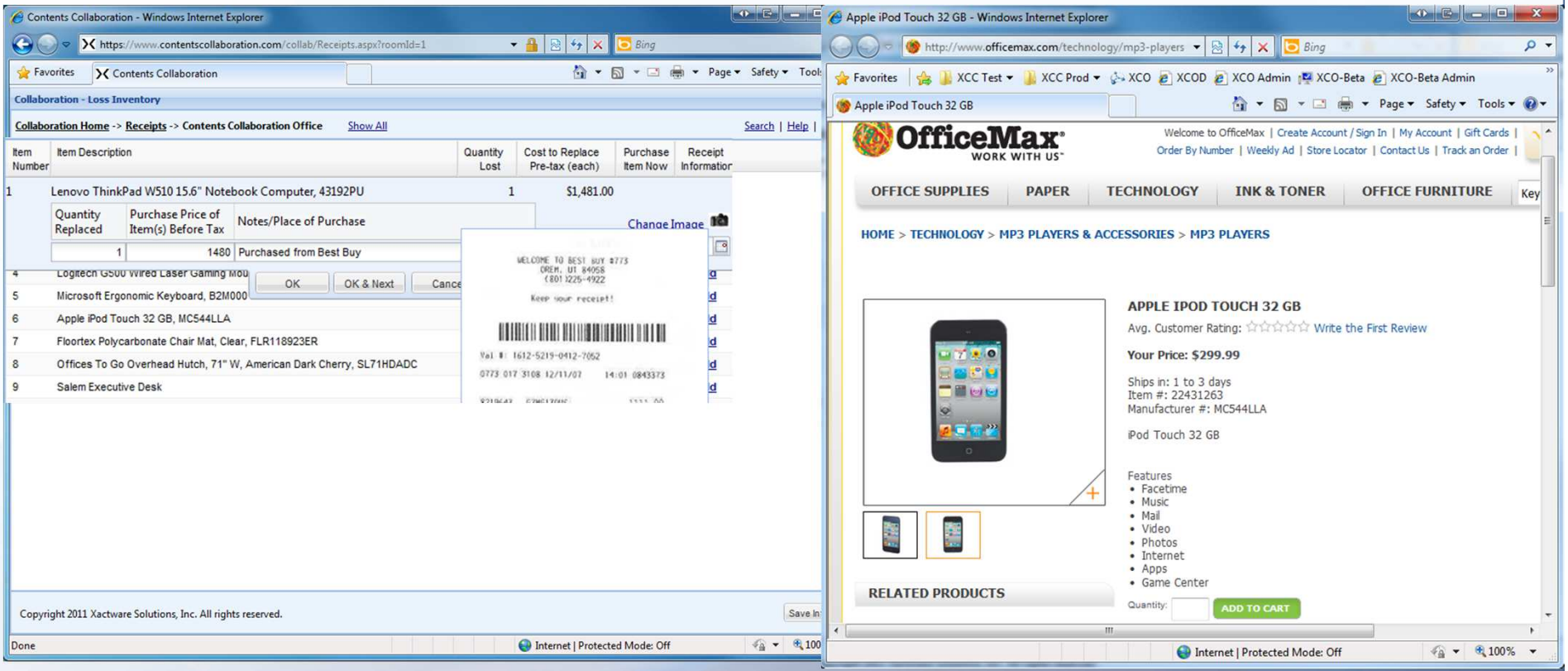


Uploaded Reports

- Specify which reports are uploaded to the insured
- The insured can access them whenever they want
- Potentially remove the need to email or physically mail to the insured

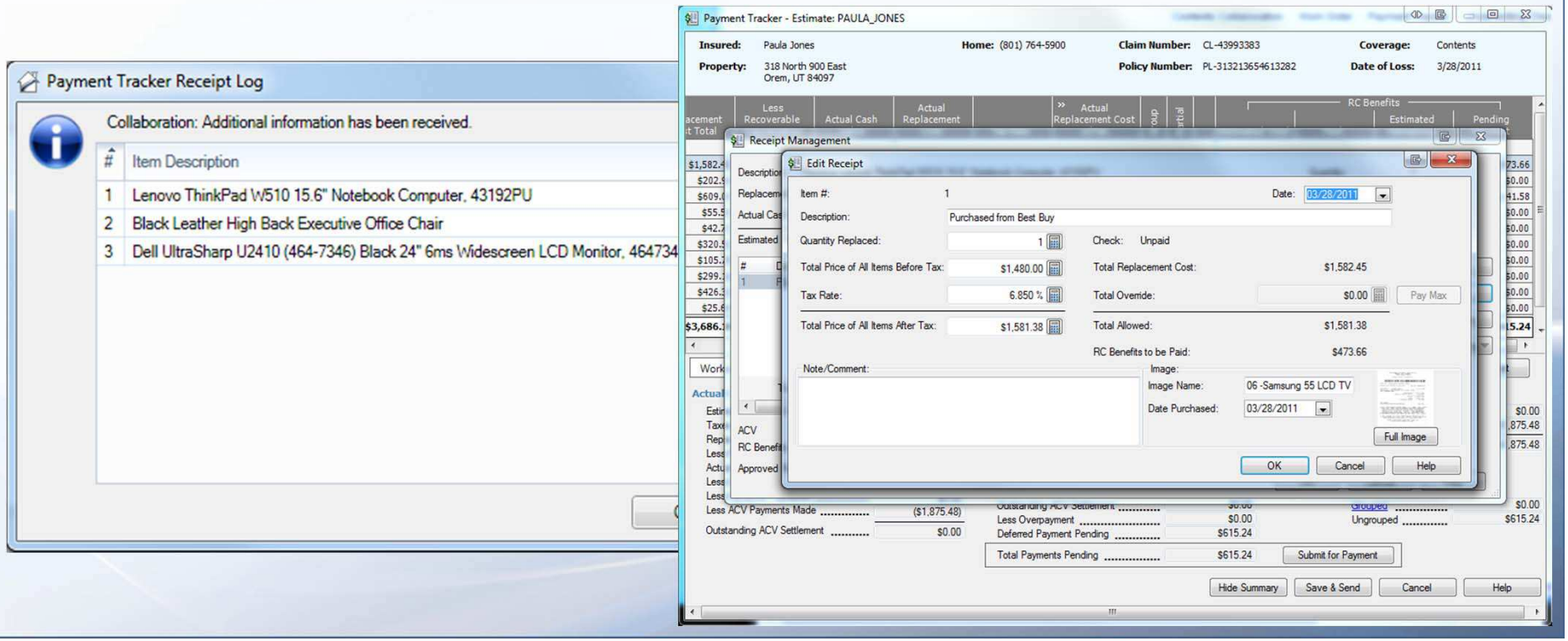
Receipt Management

- Insured able to click “Buy Now” to purchase items
- Insured will enter the quantity replaced, ARC amount before tax, and a description of where they purchased the item
- Insured can also attach an image of the receipt from the retailer



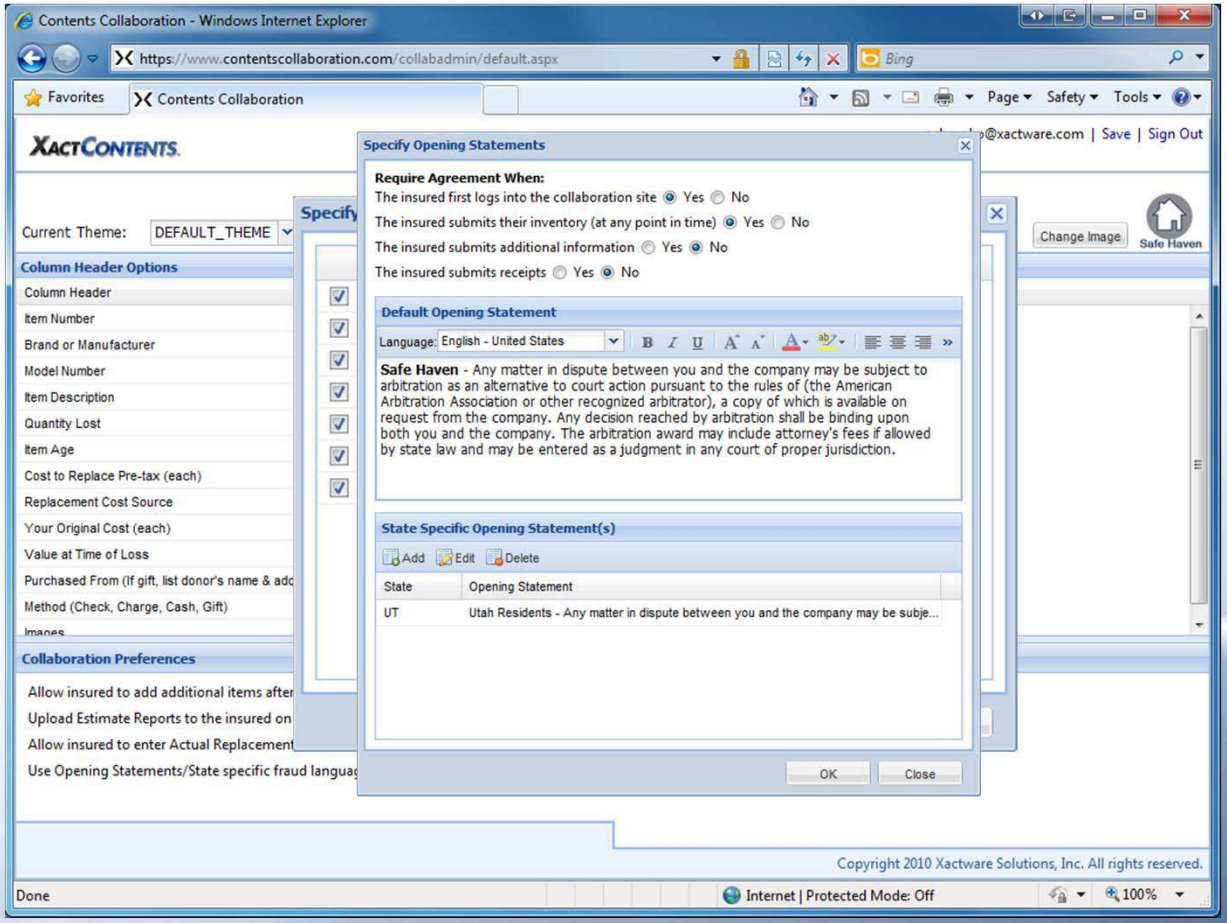
Receipt Amounts

- Actual Replacement Costs are automatically imported into the Payment Tracker
- A log will help the adjuster keep track of which items to focus on each time
- Items with multiple quantities will automatically be flagged as partial payments
- Adjuster able to view a full image of the receipt for clarity



- **Control how the site will look and behave**
  - Company Logo
  - Colors
  - Column header organization, labels, shown or not, and required for completion

- **Preferences**
  - Control Supplements
  - Reports
  - Receipt Amounts
  - Opening Statements
  - Fraud Language



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