rise above the CLAIMS

ClaimZone

MountainView Software
a division of Gallagher Bassett Services
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ClaimZone® is a comprehensive claims management application. It is available as an ASP, hosted by MountainView in a secure facility. Programmed entirely in Java (J2EEcompliant), ClaimZone was written and streamlined from the ground floor for Internet use. Your claims information can be securely and quickly accessed from anywhere there is a web connection and a browser. Your data is available in real-time across your company—eliminating redundancy, improving reporting, and speeding up processes.

**CLAIMZONE COVERS ALL COMMERCIAL LINES, INCLUDING:**

- Workers’ compensation
- Auto liability
- General liability
- Property
- Casualty
- Financial aide
- Flexible reports
- Top-level security

• 100% browser-based
• Your administrative assistant
• The right fit
• Let us show you
Specialty liability lines such as slip and fall, falling object, false arrest, and product liability are also covered in this complete package. Specialty lines may be supplemented with additional, customized data screens specific to those lines and how you manage them.

The user interface for ClaimZone is remarkably intuitive. Color-coded windows and title bar information help you keep track of your claims and related claim activities. A navigation bar (a) and recognizable icons (b) provide fast and easy access to screens and modules. Short-cut keys and buttons (c) help you quickly accomplish common tasks, and data entry shortcuts (d) reduce the time required to input claim data. In short, ClaimZone was written to accommodate the claims adjuster.

The ClaimZone claim status bar supplies important information about each claim. At a glance, the adjuster can learn if a claim is in litigation, if the claimant is represented by an attorney, if there is subrogation involved, and more. Other information, such as the claim status, the insured, and the policy number appear in the first section of the bar. The ClaimZone system navigation bar provides easy direction to other areas of the application. Quick-links launch the adjuster’s task (diary) list, open the reports module, allow you to search for other claims, and provide access to the ClaimZone help system.
ClaimZone’s administrative and financial sections are used by your system administrator(s) to setup and manage various system functions, including:

- **Audit logs**: Review changes made to a field; see when data was changed and by whom.
- **System security**: Configure the permissions and roles of users—what they can see, change, and do within ClaimZone.
- **Codes**: Customize the choices for dropdown boxes, pay codes, etc.
- **Electronic data interchanges (EDI)**
- **Index bureau extracts**: Retrieve ISO fraud scores and more.
- **Financials**: Bank accounts, currencies, check registers, etc.
- **And more…**

Your administrator will also use the admin module to schedule routine tasks, such as claim imports and nightly claim processing, via a scheduler feature eliminating the need for time-consuming maintenance scripts.

**CLAIMZONE IS SCALABLE**

ClaimZone is a great complement to your organization because it is scalable and customizable. Our clients range in size from one user to 1,600+ users. Regardless of your business’ size, we have experience integrating ClaimZone, and making it work for you. Following are examples of the adjustments you may make to your system to fit your current and ongoing organizational structure and reporting requirements:

![Organizational Structure](image)
• **Organizational structure:** Create a business unit hierarchy that matches and supports your organization. The hierarchy, which can be expanded as your organization grows, will control the level at which claims are entered and how they are reflected on reports.

• **Users, roles, and permissions:** Quickly add users into the system and easily edit their roles and authority levels.

• **User-defined fields:** Add data fields to various pages in order to capture information specific to your business.

**FINANCIALS**
ClaimZone provides financial features such as batch payment entry and batch payment approval, scheduled payments, and a series of financial screens, including an onscreen summary of all financials with “as-of” capability. Other features include:

![Financial Summary Table]

<table>
<thead>
<tr>
<th>Category</th>
<th>Reserved</th>
<th>Paid</th>
<th>Pending</th>
<th>Refunded</th>
<th>Recovered</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>6000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6000.00</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td></td>
<td>576.82</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Medical</strong></td>
<td>6000.00</td>
<td>576.82</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>5423.18</td>
</tr>
<tr>
<td>Claim Totals</td>
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<td>576.82</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>5423.18</td>
</tr>
<tr>
<td><strong>Claim Net</strong></td>
<td>6000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Checks: Check register and check generation.
• Reserve lists and worksheets: Powerful tools for creating/maintaining reserves.
• Payment requests: View and enter payment requests from a single screen.
• 1099s: Payer, recipient, and generation processes.
• Payment offsets: IRS withholding, pension, social security benefits, etc.
• Pay codes: Help you keep track of expenses/reserve categories.
• “As of” financial reporting: Look back in time at claim financials.

SOLID AND FLEXIBLE MANAGEMENT REPORTS
Dozens of management reports come standard with your ClaimZone application. MountainView Software uses Crystal Reports® (A Business Objects® product) to create the reports. The canned report list (pre-defined report templates) contains commonly requested reports, such as:

- Adjuster diary activity
- Adjuster work load reports
- Bank account summary
- Check register
- Claim document listing
- Claim financial comparative analysis
- Claim listing/claim detail reports
- Closed claim analysis
- Code listing
- Contact listing (by claim and by contact)
- Diaries reports
- EDI submission
- Frequency of claims comparative analysis
- Inactive indemnity/medical claims
- Insured listing
- Lag time
- Litigation calendar
- Loss run reports
- Past due diary report
- Policy listing
- Provider Listing
- Recovery list
- Refund list
- Reporting location listing
- Role listing
- User list by role
- And more...

In addition to the canned reports, custom reports can be created and added to your application.
ClaimZone also contains an ad hoc reporting feature, which allows you to create and save custom reports on the fly. Simply select the tables and the corresponding fields required, establish the parameters (i.e., payment date range) that will focus the data results, save, and then generate the report. Ad hoc reports create an XML file that is easily pulled into and manipulated within Microsoft Excel®.

ClaimZone clients are also provided a “Reporting” database. This simplified system of tables is securely downloaded to your network on a nightly basis providing you with a copy of your data in-house for internal reporting.
CLAIMZONE IS SECURE
Client access to ClaimZone occurs over SSL connections, which ensure that any information transmitted between your computer and the production server is encrypted and protected from third party access. Other data exchanges are protected using PGP encryption algorithms and/or secure file transfer mechanisms. Firewall and Internet security devices are also set up to protect the back-end servers.

Your production application is housed in a third party facility. Security controls limit the access to the ClaimZone servers to only those employees who are necessary to ensure prompt and accurate service and maintenance of your application and data. Daily, full backups are made and are stored in an off-site and secure location. Disaster recovery plans are in place and are regularly practiced to ensure that in the event of a disaster, your application will be restored to a new production environment and server and be online within 24 hours.

CONTACT US TODAY
We invite you to contact us today to schedule a demonstration of ClaimZone. Simply call us at (888) 533-1122 or visit www.ClaimZoneSoftware.com and one of our representatives will help arrange a demonstration at a time that is convenient to your schedule. During the demonstration, in addition to showcasing some of the other features of ClaimZone, we will discuss with you pricing, support, and any other items of interest. We look forward to speaking with you and to serving your needs long into the future.
“The price, the user interface, and the integration with our HR system all made ClaimZone® Reporter the right choice for us to report claims.” – Victoria McColm, Risk Supervisor, City of Colorado Springs

Whether you operate a single site or report claims from multiple locations across the globe, ClaimZone® Reporter, MountainView Software’s 100% browser-based Java application, is accessible for all your first report needs. ClaimZone Reporter utilizes the power of the Internet to provide secure access to, and fast and easy creation of:

- Workers’ compensation claims *(state FROI)*
- Auto liability claims
- OSHA logs
- General liability claims *(ACORD or FROI)*
- Property claims
ClaimZone Reporter will run on any computer with a web browser and an Internet connection.

Acting as the host for the application, MountainView Software will:
- Provide you with secure access anytime, from anywhere.
- Help you setup any number of users who can log-on/create a claim report.
- Safeguard your data with the strongest Internet security solutions.
- Offer ongoing support and service to your users.
- Back up your data.

In short, if you are looking for an affordable web-based tool to help you collect and properly report claims, you will find it in ClaimZone Reporter.
STANDARD AND CUSTOM FORMS
ClaimZone Reporter contains all the workers’ compensations forms (i.e., California’s 5020 Form) for all 50 states, Guam and Puerto Rico. It includes the standard ACORD forms for reporting liability claims. Your users will also access the system to complete specialized reports, such as the DLHWC (Longshore) form. Web-accessible forms may be completed, saved and retrieved by multiple users.

In addition to the standard forms, ClaimZone Reporter’s flexibility provides the ability to create customized forms, pages and questions. For example, if the standard ACORD forms do not meet all of your reporting needs you may add custom questions to the end of the questionnaire. ClaimZone Reporter uses questionnaires (groups/pages of questions from your state specific workers’ compensation and liability forms) to systematically complete claim reports. As illustrated below, users are guided through a report one questionnaire at a time.
OSHA LOGS
ClaimZone Reporter dramatically reduces the time required to accurately compile information for an OSHA 300 (Log of Work-Related Injuries and Illnesses), 300A (Summary of Work-Related Injuries and Illnesses), or 301 (Injury and Illness Incident) report. Here is how it works:
- Claim data entered as a first report is compiled for the OSHA log. You do not have to duplicate the data entry process with ClaimZone Reporter.
- Logs may be printed at any time and for any location of your choosing.

Ask us today how we can help you reduce your workload with our OSHA reports feature.

CLAIMZONE REPORTER’S USER INTERFACE
Your users and your workflow will benefit from the interface of ClaimZone Reporter. Hyperlinks (a) provide fast and easy access to screens and modules. Easily recognizable icons (b) and buttons (c) make finding and saving data a breeze. Data entry shortcuts (d) reduce the time required to input claim data and improve accuracy. Additional time saving features, such as default answers, may be setup to auto-generate information each time a new claim report is opened. No other system offers as much flexibility or the same level of power to meet all your claim reporting needs.

FLAWLESS INTEGRATION WITH OTHER SYSTEMS
We fully expect that you will maintain and use other systems in conjunction with your ClaimZone application. This is why ClaimZone Reporter has been designed to seamlessly export data into the ClaimZone claims management system, spreadsheet programs such as Microsoft Excel®, or into a system of your choosing. If necessary, MountainView Software will customize a data format that fits your exporting needs.
SECURITY
The same security controls used to guard and maintain ClaimZone are used with ClaimZone Reporter. Additionally, ClaimZone Reporter also offers customized user permissions and preferences that ensure your data’s security, reliability, and accuracy. Users log into ClaimZone Reporter with a unique user ID and password. Predetermined rights will define the types of claims each user can enter/view.

Preferences can be setup to auto-fill repetitive information such as policy, carrier, administrator, and other important pieces of data related to the claim. This saves your employees time in the data entry process and yields more accurate results.

CONTACT US TODAY
We invite you to call us today at (888) 533-1122 or visit www.ClaimZoneSoftware.com to learn more about ClaimZone Reporter. Our representatives will answer any of your questions and can arrange a time that is convenient to view a short online demonstration of ClaimZone Reporter (and ClaimZone if you’d like). We look forward to speaking with you and hope to become your choice for claims reporting and claims management.
MountainView Software is proud to introduce ClaimZone® RMIS, the newest member of the ClaimZone family. ClaimZone RMIS is a powerful and affordable Risk Management Information System that will complement your other ClaimZone products. ClaimZone RMIS may also be used as a stand-alone application and integrated with other, existing systems. ClaimZone RMIS becomes the centerpiece of your risk management department.

**DATA CONSOLIDATION**

Bring all of your claim data together—see all of your risks at the same time. ClaimZone RMIS consolidates data from any number of claims systems (past and present), TPA’s, carriers past and present, etc. Various exposure data can also be incorporated to allow for enhanced reporting. Consolidated data is available for on-screen viewing, formal printed reports, export to Microsoft Excel for analysis, charting, and graphing. No more need to try and see the whole picture across various reports from multiple sources. Data loads are currently available from most major insurance carriers, claims systems, and TPA’s. Let us help you see the whole picture at one glance.
WEB-BASED
Access consolidated data anywhere there is an Internet connection. Data backup and security is done for you. You only need a web browser and Excel; no other programs are required, nothing is installed on your local computer.

FLEXIBLE
Query data instantly, see results on-screen, then send to a report or export to Microsoft Excel. Save common reports and queries for easy access.

Drill-down and look at the individual claim specifics. Review claim financials and the claim’s policies.

Shadow-edit data fields on claims “owned” by outside data sources. Immediately correct data for reporting purposes without having to notify the outside source and reload data while storing original values.

Add notes to any of the claims in the system (even claims being handled externally) and set diaries for yourself or others to ensure that follow-up tasks are completed.

REPORTING POWERHOUSE
On-screen queries run at “the speed of conversation.” Query the claims you want—instantly see the results. Confirm your findings with an easy-to-read description of your query criteria (such as: “45 results match your criteria where last name contains Smith and accident state is FL and the total incurred exceeds $10,000”).

Re-sort the list of claims by any of the columns of data, add, and change the order of new columns of data. Export those claims to predefined Microsoft Excel templates containing all the data elements you want, or export the claims to report templates that show the data in easy-to-view graphs, charts, or styles.
Save favorite views—your selected data fields and the display order are all saved for consistency and convenience. Share your favorite views with other ClaimZone RMIS users in your company.

Save queries—multiple sets of complex search criteria can be named and saved. Re-run these queries from a drop-down menu, or schedule them to run daily, weekly, monthly, and then distribute the results via email. Configure any number of desired reports—define the search criteria and then the output format (a report, a spreadsheet, etc.); set up date parameters (like “Last Month,” “Last Quarter”); request the delivery date and frequency (each month on the 1st day of the month); choose the distribution list (you, your boss, the claims manager, etc.).
Then, enjoy peace of mind knowing that ClaimZone RMIS is always working in the background, plowing through all the incoming data, and producing the reports you need.

The power of ClaimZone RMIS is in the ability to provide immediate answers to your questions about claims that exist in multiple data sources.

**CONTACT US TODAY**
Please call us today at (888) 533-1122 or visit www.ClaimZoneSoftware.com to learn more about helping your company get the whole picture with ClaimZone RMIS.
Whether you have one user or 2,000 users, investing in new software without comprehensive service and support just doesn’t make much sense. To get the most out of your experience, you need a partner who is invested in your organization for the long haul. At MountainView Software, we go to great lengths to provide you with the best customer service and technical support in the industry.

**TECHNICAL SUPPORT**

Some software companies limit their customers to a specific number of calls, or a certain amount of time for technical support. In our opinion, that is a big red flag that says that they must not have much confidence in their product. MountainView Software’s Technical Support department is open for your calls and emails, Monday through Friday, 7:30 a.m. to 5:00 p.m. (Mountain Time), with additional hours available as needed.

**UPGRADES**

ClaimZone products are offered through MountainView Software’s SAS hosting service. We host your application and your data, and we maintain all the hardware and Internet connections for you.
Each time we release a new version of ClaimZone, we will notify you of the release and seamlessly upgrade your application at no cost. There is never any software for you to install. All you will need to do to view the changes is log-in. Additionally, whenever we make “bug” fixes, we will notify you of the changes and make sure you receive the latest build.

DATA CONVERSIONS
The most common service we provide to new customers is converting their existing data to our ClaimZone applications. Whether you are currently using a competitor or a “homegrown” system, we can convert your data in a timely and secure manner. Claim information, notes, financial transactions, contacts; it can all be moved over by our development team.

CUSTOM REPORTS
We want you to be able to seamlessly pick up right where you left off before coming to ClaimZone. Reporting is a great example of what we mean by this. We will work with you to duplicate the reports you need and recreate your reports with the same look and the same feel.

CUSTOM ENHANCEMENTS
From time-to-time, our customers will need a feature or a small enhancement added to ClaimZone. We will work with you to determine exactly what is needed and how the request will best integrate with the existing application. This is our way of making sure that our products simply do what you need them to do.
ONSITE TRAINING AND INSTALLATION
We send our technicians to clients’ locations to ensure their application is implemented the way they need it. We also train users on the ins-and-outs of the system to help them be productive and efficient right from the start.

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AN INTRODUCTION TO MOUNTAINVIEW SOFTWARE

www.ClaimZoneSoftware.com

Founded in 1994 as a custom software development and training company, MountainView Software (MVSC) bases its business model on the ideals of trust, service, and fairness. Today, as a proud member of the Arthur J. Gallagher family, these principles remain firmly ingrained in our business practices, along with our extraordinary customer service, which is designed to exceed our partners’ expectations at every turn. From our sales staff to our support representatives, you can count on MVSC employees to provide you with the customer service, the tools, and the information you need to succeed.

In addition to our focus on value-driven business practices, MVSC takes pride in the quality of our products. From our first commercial claims product release in 1996 (ClaimZone First Report) to the latest build of our web-based ClaimZone, we pay careful attention to the details that will save you time and help you focus on what’s important to your practice.
Since its inception in 1962, Gallagher Bassett Services, Inc. has become the country's largest multi-line property/casualty third-party administrator (TPA). They specialize in helping their clients reduce exposures to risk and the steep costs that can go with them. Gallagher Bassett provides customized risk management programs with a clear focus on quality.

Today, Gallagher Bassett offers a comprehensive menu of risk management services to an international array of clients, including claims management, information management, risk control consulting, medical cost containment, and appraisal services.
AN INTRODUCTION TO ARTHUR J. GALLAGHER & COMPANY
www.ajg.com

Founded in 1927, Arthur J. Gallagher & Company (AJG) has become one of the largest insurance brokerage service firms in the world. Today AJG plans, designs, and administers a full array of customized, cost-efficient property/casualty insurance and risk management programs. The company also furnishes a broad range of risk management services—including claims and information management, risk control consulting, and appraisals—to help corporations and institutions reduce their cost of risk. In addition, the company assists clients in all areas of their employee health/welfare and retirement plans, including plan design, funding, and administration.

CONTACT US TODAY
Now that you’ve had a chance to browse through this guide, we invite you to contact us at (888) 533-1122 or visit www.ClaimZoneSoftware.com to arrange for a demo—your next step to success.