Smart Claims Dashboard

Introduction

This Job Aid discusses how to use the Smart Claims Dashboard. This dashboard provides users the following benefits:

- Provides carriers with insight into their Smart Estimate and Quick Estimate Claim volumes.
- Carriers gain a better understanding of the benefits and how their teams are utilizing the tools.
- Compare appraisers/different breakout values to the company average.
- Conduct further analysis into these claims to understand why they are performing better/worse than the company average.
- Choose a time period to analyze whether the insurance carrier is improving on a specific metric over time and conduct same analysis for a specific breakout value.
- Determine how Smart Estimate and Estimate STP improves cycle time versus solely using Quick Estimate claims.
- Understand how Smart Estimate is being utilized from what percent of lines/TCOR/time is completed in Smart Estimate versus in Legacy.
- Determine how specific utilization metrics behind Smart Estimate, Estimate STP, and Quick Estimates vary by appraiser, vehicle owner location and hierarchy.
- Determine your adoption of Estimate STP.

This Job Aid covers the following topics (click to jump to section):

Note: It's recommended to follow the topics above in sequential order to view or create a custom dashboard.

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Example Use Cases

The following are use case examples for the Smart Claims dashboard:

- Perform a Cycle Time Analysis to analyze estimate start to complete times for Smart Estimate vs non-Smart Estimate claims. This will allow you to identify opportunities for improvement and periods of time of usual fluctuations.
- Benchmark data to compare a breakout attribute to the company average. This will allow you to Identify areas for training opportunities, claims that attribute to heightened values for specific Key Performance Indicators (KPIs), appraisers who are outperforming, or underperforming in specific areas.
- Use Smart/Quick Estimate Utilization to analyze performance around the Smart Estimate tool at a company and appraiser level. This will allow you to identify areas for training opportunities/areas to reduce cycle times.
- View a Claim Breakdown to conduct an analysis of the claim level crosstab. Download data to Excel for further modifications.

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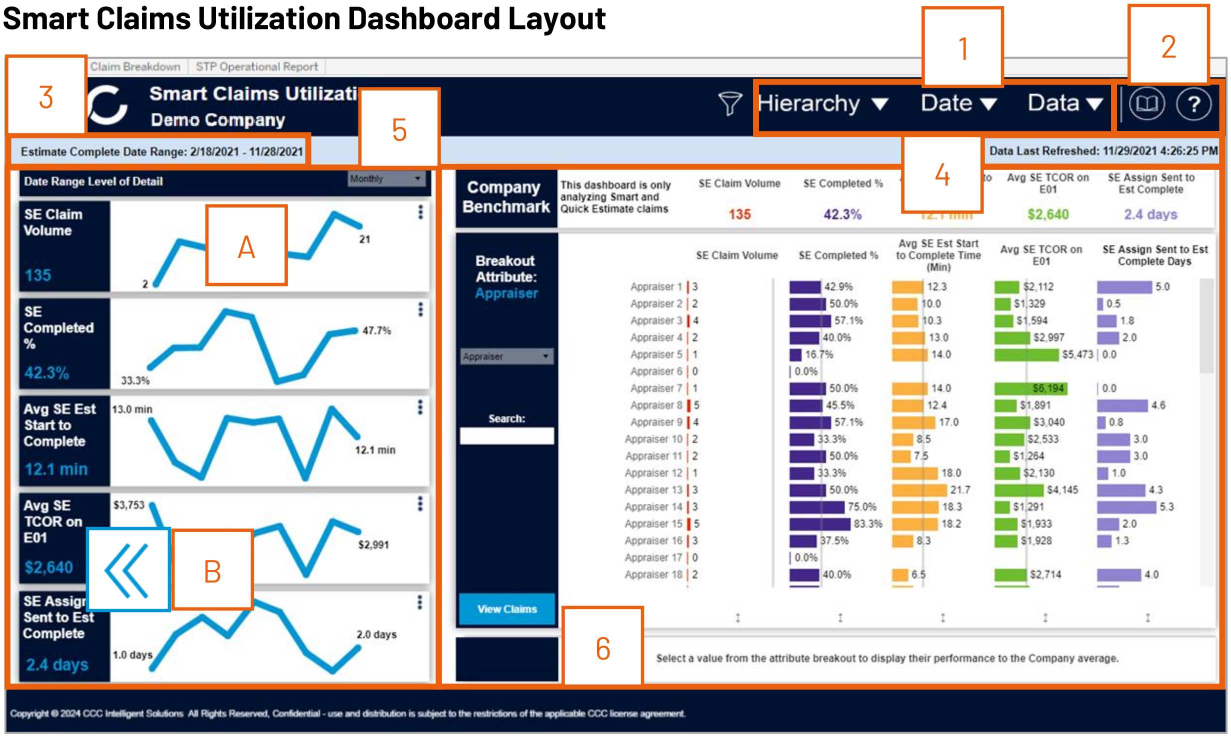
Smart Claims Utilization Dashboard Layout



This dashboard measures trends over time for 4 selected KPIs and provides visibility into these 4 metrics through different breakout attributes. These breakout metrics are then benchmarked to the company average. Review the table below for a description of the parts of the **Smart Claims Utilization Dashboard:**

Part	Description
1	**Hierarchy, Date, and Data** filter dropdowns, *see page 7 for additional details.*
2	• Click the **Book** icon to view a glossary of terms. • Select the **Question Mark** icon for a description of the dashboard's functions.
3	Shows the **Date Range** selected from the Date filter dropdown (Estimate Complete Date or First Assignment Sent Date).
4	The **Date Last Refreshed** indicates the last date and time the data was refreshed in the dashboard.
5	The **KPI** tiles show a list of customizable metric trend lines which can be interchanged using the ellipses icon in the tile. Can show 5 metrics at a time on the dashboard. These metrics are visually displayed by trend lines that are aggregated by the date range level of detail. Allows a user to display the metric by month over month, quarter over quarter, etc. The line chart displays the **(A)** start and end totals. Hovering over the line will show further details including the KPI value in between the start and end. Each tile also displays the **(B)** aggregate of the metric over the entire period (sum or average, depending on the metric) *See page 5 for additional details to configure these tiles.*
6	Displays the KPI selected from KPI tiles and the breakout attribute selected. The bar charts show additional filtering and searching capabilities. *See page 6 for additional details to configure these bar chart.*

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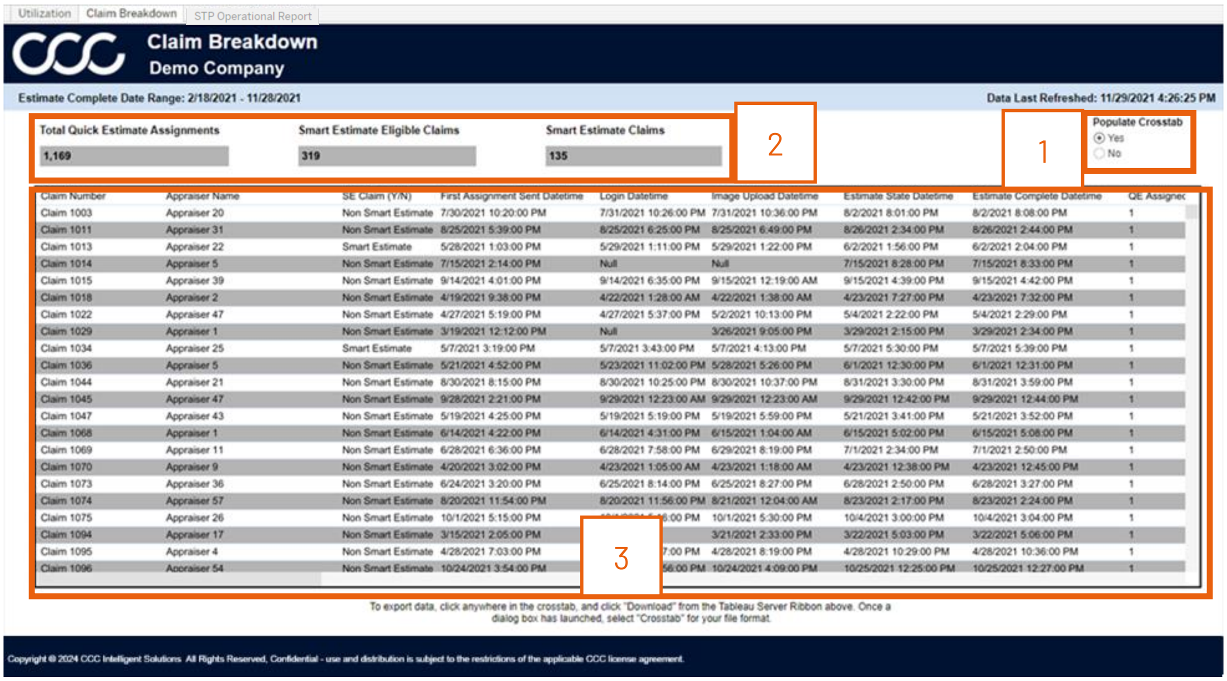
Claims Breakdown



This dashboard allows you to Analyze/Export different details around all Smart Estimate/Non-Smart Estimate claims. Review the table below for a description of the parts of the **Claim Breakdown Dashboard:**

Part	Description
1	Select **Yes** from the **Populate Crosstab** selection to populate the crosstabs.
2	Shows Overall Claim Volumes based on the company/filtered values on the Smart Claims utilization dashboard for the following metrics Total Quick Estimate Assignments, Smart Estimate Eligible Claims, and Smart Estimate Claims. **Note:** If you click on a breakout metric in the Utilization dashboard and come to the claim breakdown it will only be for that specific breakout.
3	The table shows a breakdown of claim level detail with their associated metrics.

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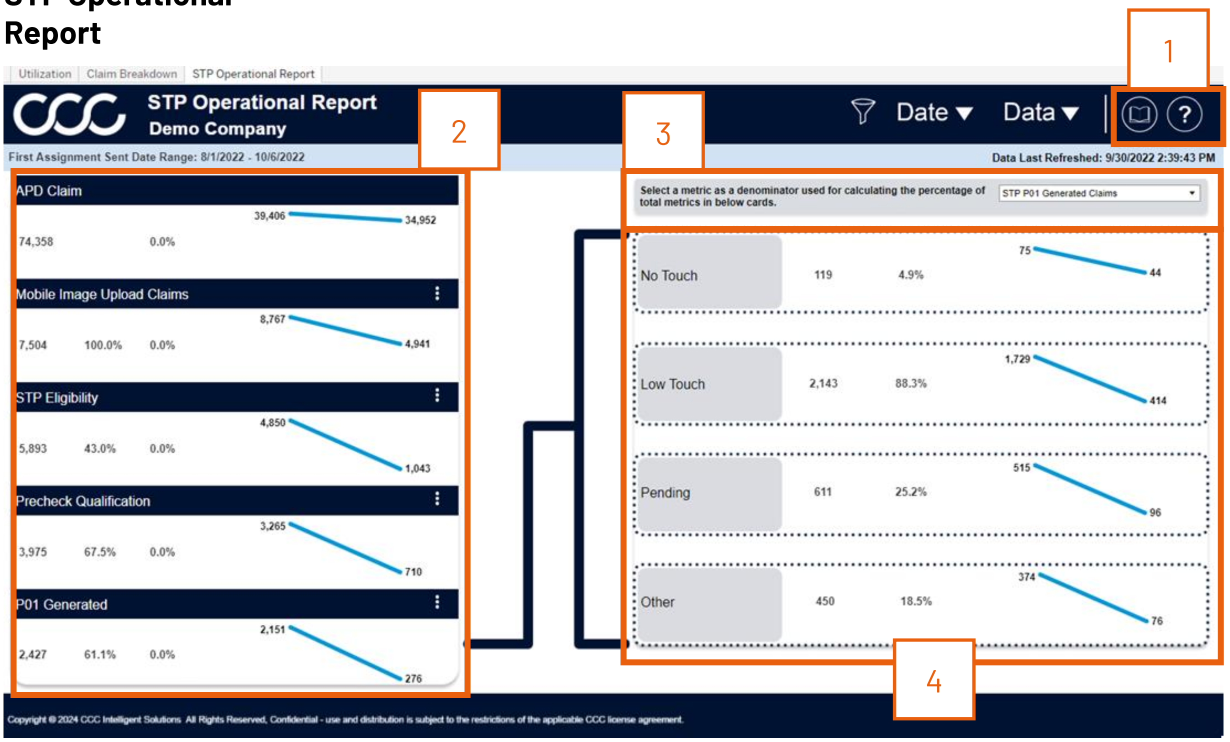
Smart Claims Dashboard, Continued

STP Operational Report

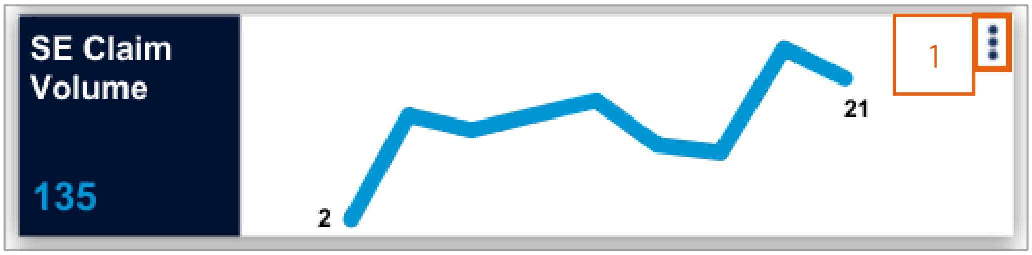
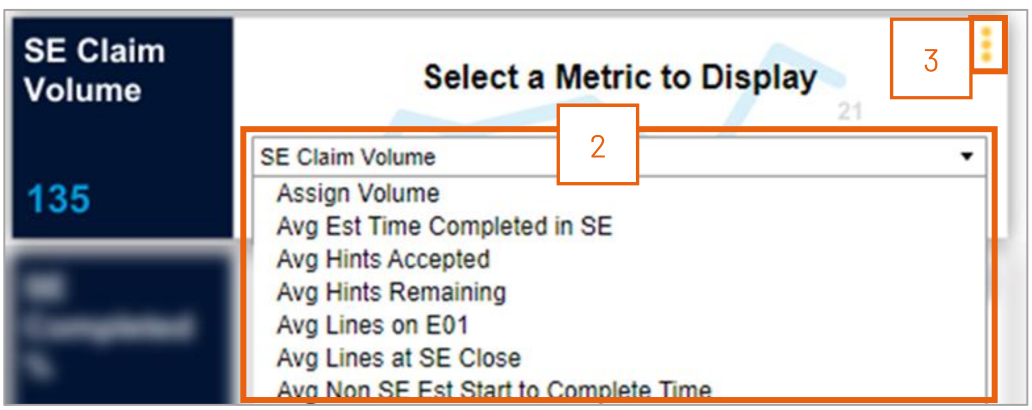


This dashboard allows you to recognize the adoption and volume of STP eligible claims and those claims that successfully make it through this process.

Part	Description
1	• Click the **Book** icon to view a glossary of terms. • Select the **Question Mark** icon for a description of the dashboard's functions.
3	The **KPI Cards** show overall Claim Volumes based on the company/filtered value on utilization sheet.
4	The **Denominator Picker** allows a user to change the denominator for the percentage calculation in the cards below. Example: the low touch volume would be divided by the selected metric in this dropdown.
5	The **STP Status Cards** show the volume broken down by No touch, low touch, pending, and other claims.

Dashboard Configuration

To view or create a custom dashboard, follow the steps below to configure the KPI tiles in the dashboard:

Step	Action
1	Click the ellipsis icon to open the Select a Metric to Display menu. 
2	Select the desired **metric** from the dropdown, the metric will automatically be applied to the dashboard when selected.
3	Click the **ellipsis** icon again to close the Select a Metric to Display menu. 

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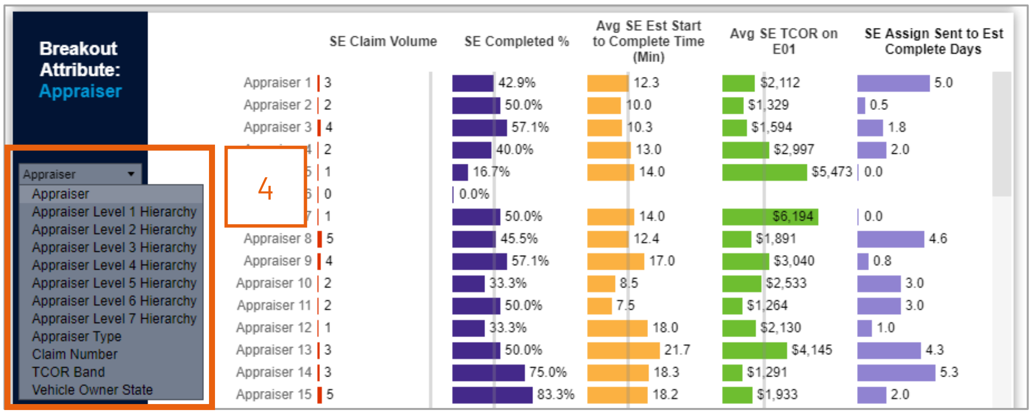
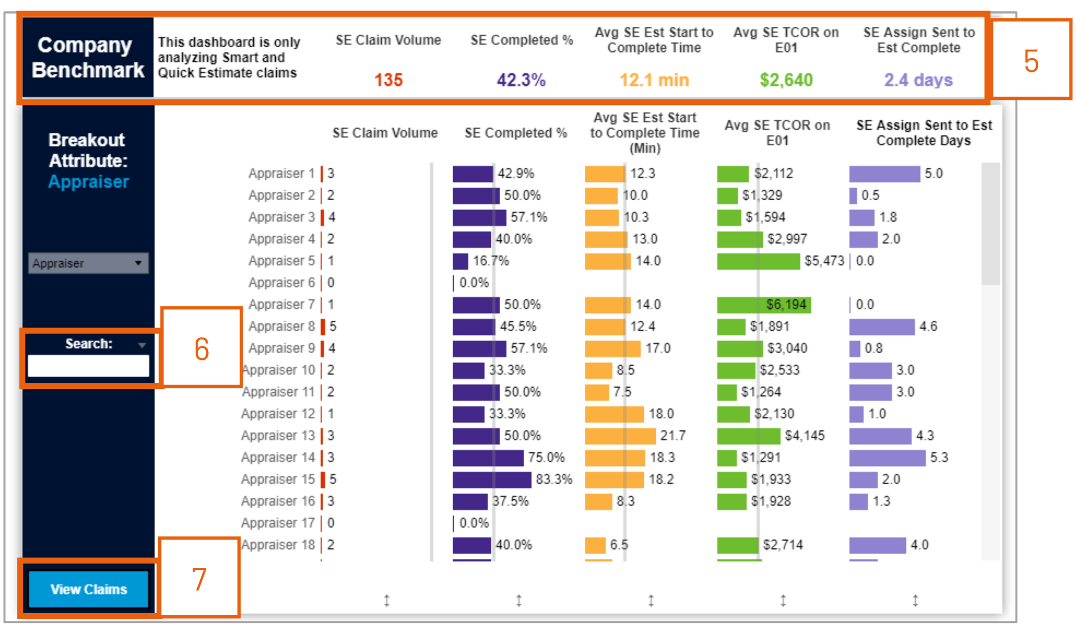
Dashboard Configuration, continued

To view or create a custom dashboard, follow the steps below to configure the bar charts:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select the desired attribute from the Breakout Attribute dropdown.

</td></tr>
<tr><td>5</td><td>The Company Benchmark area always displays the company average.</td></tr>
<tr><td>6</td><td>Enter a term in the search field to filter the available results, then press the Enter key to apply. Note: To revert and show all results, clear the search field and press Enter.</td></tr>
<tr><td>7</td><td>Click View Claims to navigate to the Claims Breakdown dashboard.

</td></tr>
</table>

Dashboard Filtering

Review the table below for a description of the **Smart Claim Utilization** Hierarchy, Date, and Data filters, adjust the filters as needed:

Part	Description
1	**Hierarchy Filters:** Select one or multiple of the following options. • **Appraiser Type:** Select All, Null, Independent Appraiser, Repair Facility, and/or Staff Appraiser. • **Level 1-7 Hierarchy:** Select the associated name(s). for Appraiser, Appraiser Claim Office, or Claim Office.

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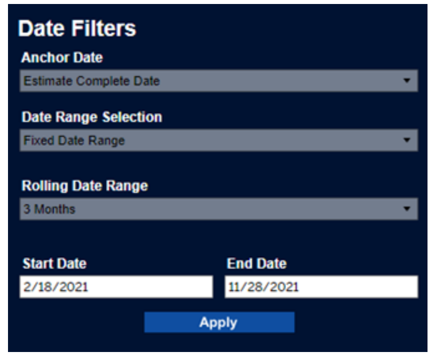
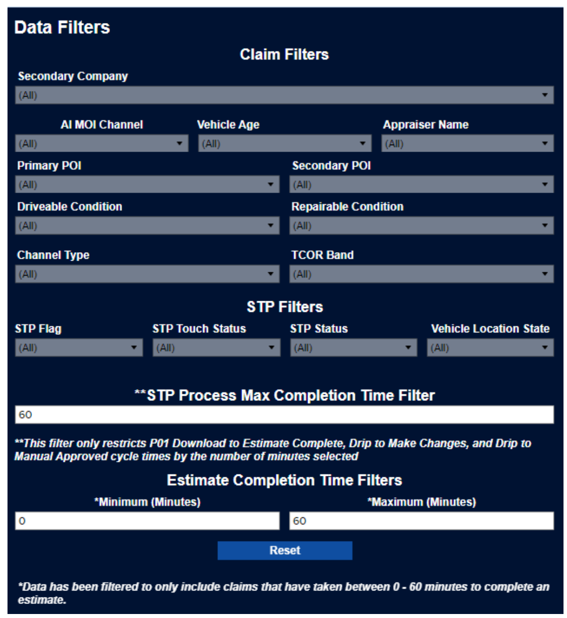
Dashboard Filtering, continued

Part	Description
2	**<u>Date Filters</u>:** • **Anchor Date:** Estimate Complete Date or First Assignment Sent Date. • **Date Range Selection:** Rolling Date Range or Fixed Date Range. • **Rolling Date Range: Select a Date Range:** • **Prior Month** • **Current Month** • **1 Month** • **3 Months** • **6 Months** • **9 Months** • **1 Year** • **18 Months** • **2 Years** • **Start Date-End Date:** Enter or Select a Start and End Date based on the anchor date. Click **Apply** to set the charges.
3	**<u>Data Filters</u>:** Select one or multiple metrics in the following categories: • **Claim Filters** • **STP Filters** • **STP Process Max Completion Time Filter** ○ Drip to Manual Approved Minutes ○ Drip to Make Changes Minutes ○ P01 Download to Estimate Complete Minutes • **Estimate Completion Time Filters:** Select the time it takes to complete an Estimate. Select the **Minimum (Minutes)** and **Maximum (Minutes)**. Click **Reset** to view all estimates regardless of estimate completion time.





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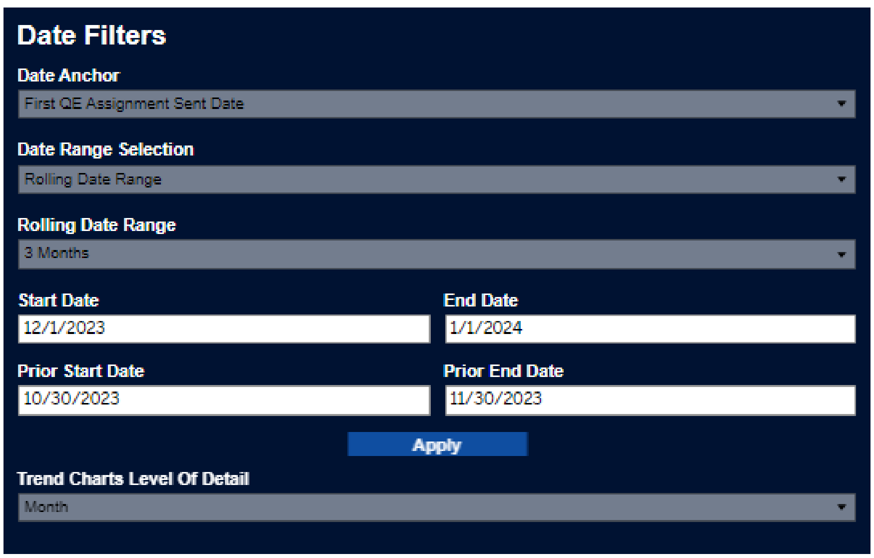
Dashboard Filtering, continued

Review the table below for a description of the **STP Operational Report** Date and Data filters, adjust the filters as needed:

<table>
<tr><th>Part</th><th>Description</th></tr>
<tr><td>1</td><td>Data Filters:

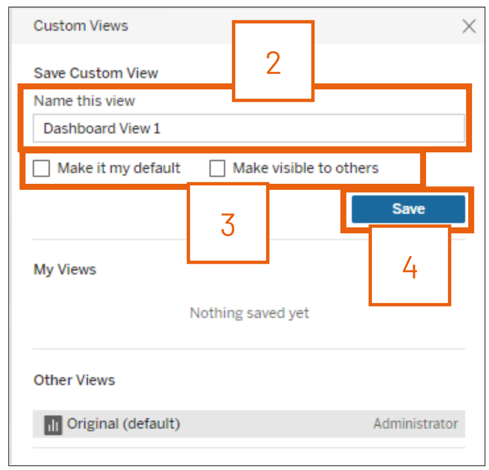
Select one or multiple of the following options.
• Date Anchor: Select an option from the dropdown.
• Date Range Selection: Select fixed or Rolling from the dropdown.
• Rolling Date Range: Select a rolling date time period of the current month, prior month, 1, 3, 6, 9 months, 1 year, 18 months or, 2 Years.
• Start/End Date and Prior Start/End Date: Enter the desired Start and End dates.
• Trend Charts Level of Detail: Select a detail level of Week, Month, Quarter, or Year.

</td></tr>
</table>

Saving a Dashboard View

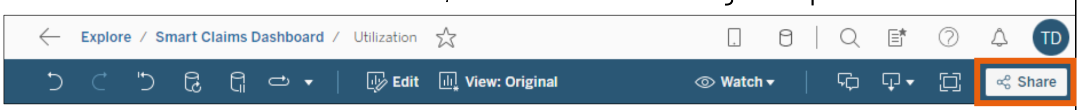
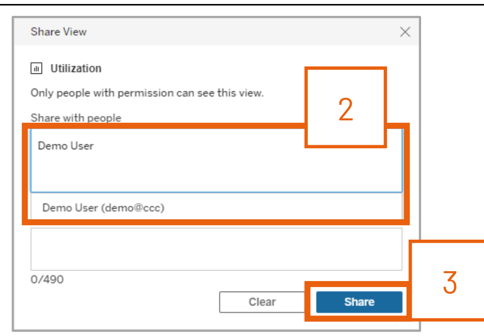
Views are a way to save configurations of metrics, breakout attributes, and filters, and easily come back to them. You can even save multiple views and easily flip between them.

To view or create a custom dashboard, follow the steps in the table below to save a view once the dashboard has been configured and filtered:

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1</td><td colspan="2">Click View: Original from the Tableau menu, the Save Custom View dialog box opens.

</td></tr>
<tr><td>2</td><td colspan="2">Enter a name for the view in the Name this view field.</td></tr>
<tr><td>3</td><td>Use the following checkboxes to adjust the views settings:
• Make it my default: Select to make the settings your default view when opening the dashboard.
• Make visible to others: Select to make the dashboard configurations visible to other users in your organization, an option will display to select the dashboard.</td><td rowspan="2">
</td></tr>
<tr><td>4</td><td>Click Save, the custom dashboard is now completed and will now appear in the My Views area of the Custom View dialog box.</td></tr>
</table>

Follow the steps below to share with a dashboard view with specific people in your organization:

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1</td><td colspan="2">Click Share from the Tableau menu, the Share View dialog box opens.

</td></tr>
<tr><td>2</td><td>Enter the name of the person in your organization to share the view with.</td><td rowspan="2">
</td></tr>
<tr><td>3</td><td>Click Share when complete, the custom dashboard is now completed and the person will review a notification that a view has been shared with them.</td></tr>
</table>

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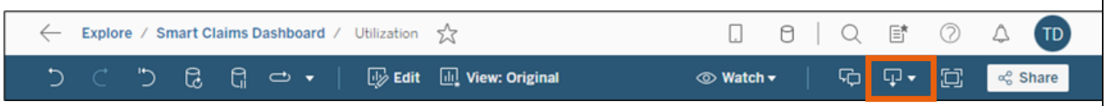
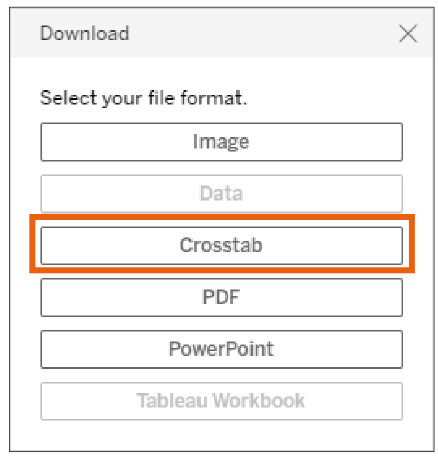
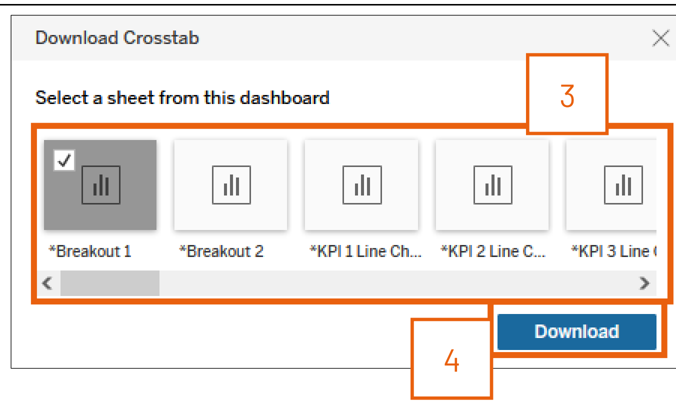
Exporting Dashboard Data

The dashboard provides users with the ability to download data present in the dashboard. Users can also adjust the filters to download more data.

To export detail records, follow the steps outlined in the table below:

Step	Action
1	Click the **Download** button in the dashboard toolbar. 
2	Choose an export option. To download the .csv file click **Crosstab**. 
3	Select a **sheet** from the Download Crosstab dialog box. **Note:** Sheets of interest have a "*" prefix. Breakout 1 is the top bar chart; Breakout 2 is the bottom bar chart and the five-line charts are KPI 1-5. 
4	Click **Download**, from the Download Crosstab dialog box open the .csv file from your computer's downloads section.

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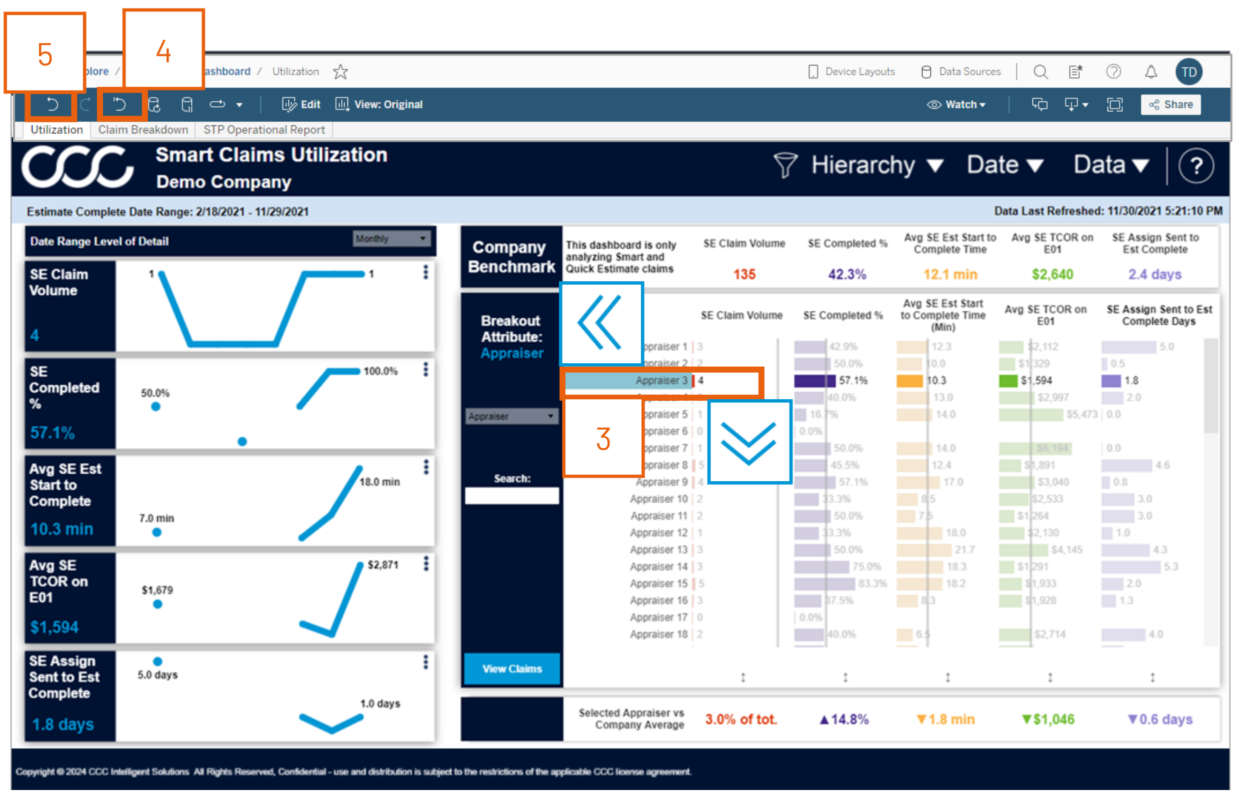
Smart Claims Dashboard, Continued

Action Filtering

The table below shows how to filter dashboard items and how use the Tableau menu items to navigate the dashboard.

Step	Action
1	Hover over the line chart to view the selected metric's detail and date for each point of aggregation. 
3	Select bar or line chart items to filter the dashboard to only display items related to that selection. For example, selecting an Appraiser from the list will affect the charts below and only show data for that Appraiser. Additionally, the line charts will also adjust to display the trends based on your selection. **Note:** Click any selected bar or line chart item again to deselect it.
4	Click the **Reset** button to undo all actions and revert the dashboard back to the default view. You can also unselect the appraiser to see all values.
5	Click the **Undo** button to undo actions one at a time.



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Data Consideration

- Data refreshes occur daily seven days a week. Data is typically available by 7a.m. Central with the prior day's activity.

Hierarchy

This dashboard pulls hierarchy information from the **CLEAR** registration system. In CLEAR, each staff user has a field for their manager to be entered.

Analytics takes these **Employee** -> **Manager** relationships and builds the hierarchy "tree" as follows:

1. Find managers that don't report to anyone, these are the Level 1 managers. They could also be referred to as the **Top Level** managers.
2. Any person whose manager is Level 1 becomes Level 2.
3. Any person whose manager is Level 2 becomes Level 3.
4. Repeat this hierarchy down to Level 7.

Notes:

- If a person does not report to anyone, but also does not have anyone reporting to them, they are not Level 1 and do not show up in the hierarchy. This was done so that if the data entry is incomplete in CLEAR, there are not random users show up in Level 1.
- The Top Level(s) aren't required to be a person. In CLEAR a **user** can be created that is a region, team name, etc., and managers can **report** to it.

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