State Farm™

Detailed Wireframes - Actions

REPORT A CLAIM I DECEMBER 06, 2012

PHASE 2.0
VERSION 4.0
STATUS: DRAFT

Table of Contents

Introduction

Document Purpose

The purpose of this document is to capture the information relating to the interaction design of the solution at hand. The primary audiences of this deliverable are (1) the business stakeholders so that they can understand how the concepts and requirements translate into functionality; and (2) the creative and technical team members so that they can understand the detailed specifications around the interface.

Document Contents

Conceptual Diagrams
This models describe the domain, the context or the solution in general terms. It provides a high-level view of the space and the overall interaction. These are not detailed and do not account for every situation or exception. Detail design artifacts, like user experience flows or wireframes cover these in more detail.

User Experience Flows
The flows describe how a user might move through the system in detail, the key interactions resulting from inputs or outputs to a screen, screen state, or step in a process. System actions or the interaction of the user interface with the back-end systems will not be described. Only those actions from the system that may result in user interface changes will be annotated.

Wireframes
The wireframes are screen schematics that describe the elements and regions of a screen from a conceptual point of view and how these interact and function. Widgets, modules, forms, etc., will be the domain of the wireframes, with annotations to explain the specifics of the interaction. Though it is common that wireframes may resemble, in some form, the final visual design, they are not to be taken literally. Developers and other interested parties should refer to the visual design documentation for visual design details and the Content Component Library (CCL) and/or Copy Deck for content details.

Note on Content
The wireframes and visual design comps may resemble the Content Component Library (CCL) and/or Copy Deck; this is for placement only. Developers and other interested parties should refer to the content documentation for final content.

References

QASet_Auto_xlsx

QASet_Fire_xlsx

QASet_Health_xlsx

QASet_Life_xlsx

Revision History
V1.0 First Draft (11/27/12 Christine Bauer & Mike McGehee)
Mapping of possible page interactions and first draft of wireframes.

Common RAC Actions

What are the possible actions and deviation points in the flow?
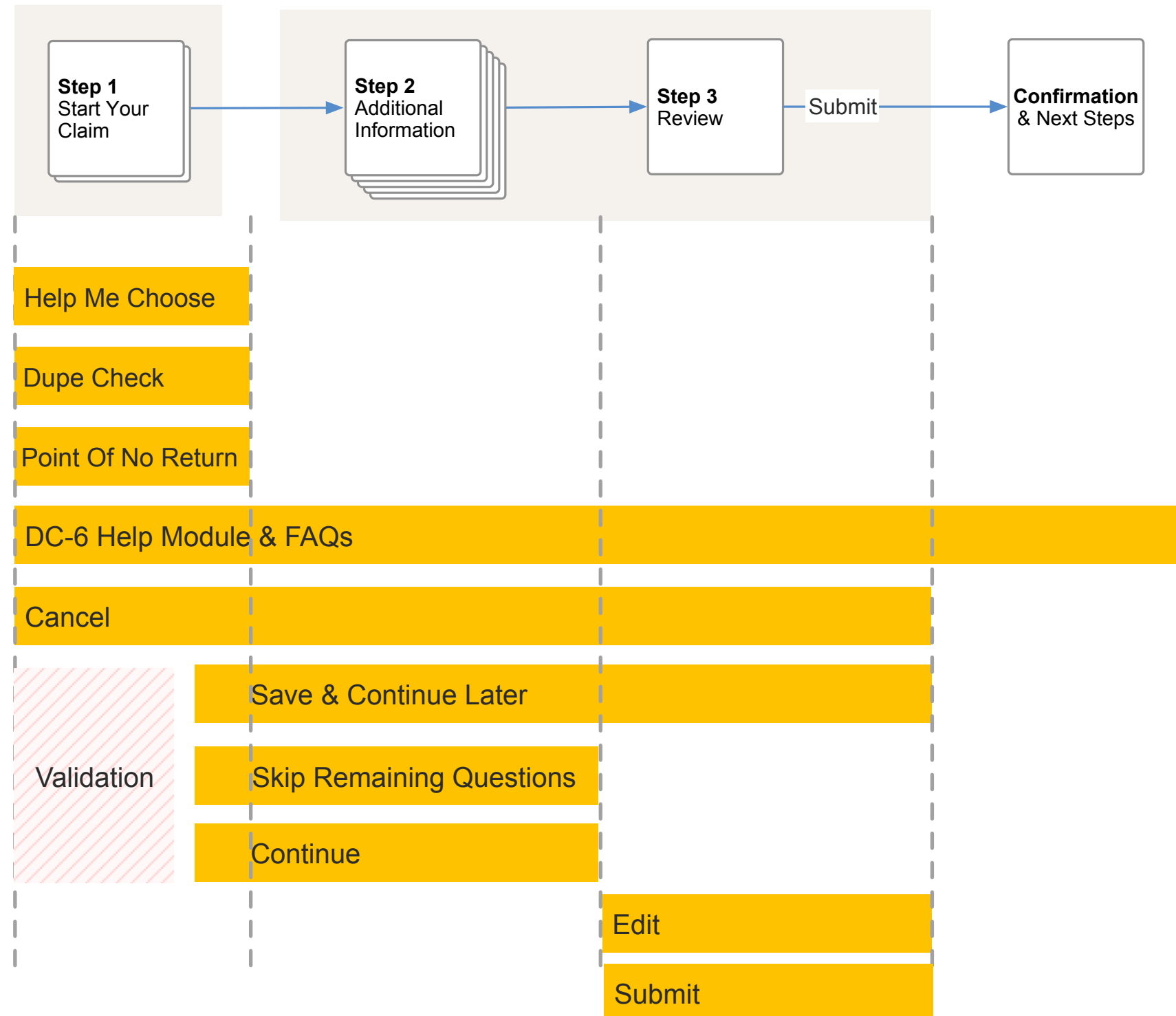
Where do these happen?

Where do they lead?

What is possible?

What are the possible actions and deviation points in the flow?

Help Me Choose	Helps user choose a line of business. Different than DC-6 Help
Dupe Check	Informs user a possible duplicate may have been found. Participant can click to view more details.
Point Of No Return	Informs user that information on Step 1 cannot be edited once they continue.
DC-6 Help Module & FAQs	Presents 800 number and possibly link to FAQs which are housed on DC-6 page.
Cancel	Allows user to cancel the claim creation (or editing) process.
Save & Continue Later	Allows user to save information entered thus far and resume at a future date (within 14 days)
Skip Remaining Questions	Allows user to skip remaining questions and jump ahead to the review page.
Continue	Allows user to advance to next page.
Edit	From the Review screen, allows the user to return to a previous page and edit values.
Submit	Allows user to submit a claim.

Where within the flow do these possible actions occur?

Step 1
Start Your Claim

Step 2
Additional Information

Step 3
Review

Submit

Confirmation
& Next Steps

Help Me Choose

Dupe Check

Point Of No Return

DC-6 Help Module & FAQs

Cancel

Validation

Save & Continue Later
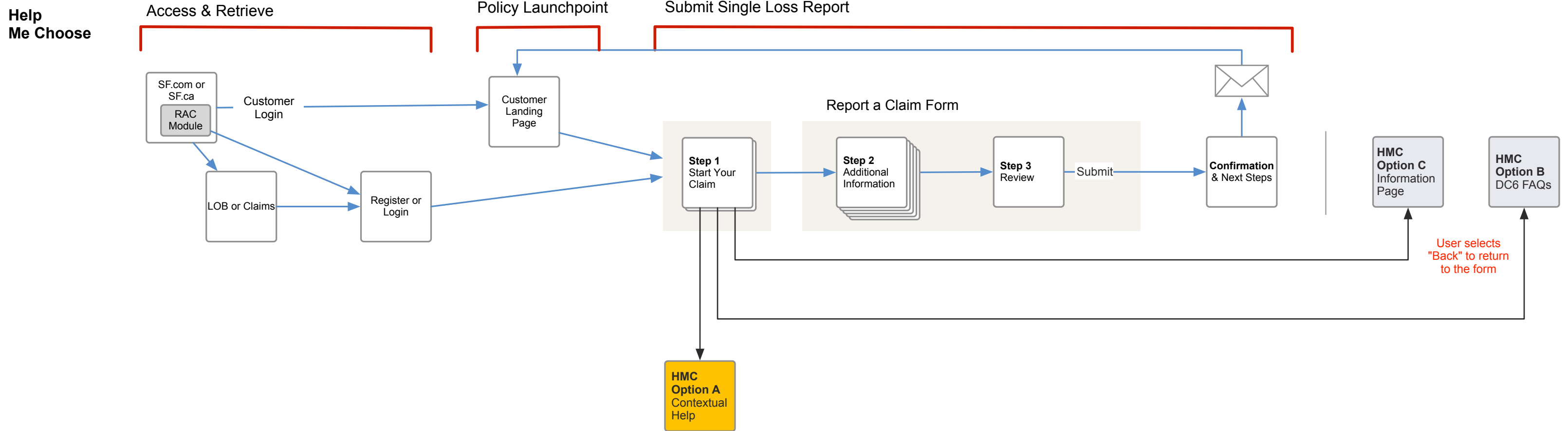
Skip Remaining Questions

Continue

Edit

Submit

Open DVTS Questions
Regarding the bottom-of-page buttons that cannot be used until all fields completed:
1) Can they be hidden until applicable?
2) If not hidden, can they be disabled until applicable?

Conceptual Flows - Help Me Choose

ACTION - Help Me Choose	
Location	Step 1
Trigger	User clicks "Help Me Choose" link below Type of Policy question
Destination	**Option A** - Displays as in page contextual help. **Option B** - Links to DC-6 FAQs page and the content is presented within a single, open FAQ. **Option C** - Links to a information page.

Help Me Choose

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

Report a Claim Form

- SF.com or SF.ca
  - RAC Module
- Customer Login
- LOB or Claims
- Register or Login
- Customer Landing Page
- Step 1 Start Your Claim
- Step 2 Additional Information
- Step 3 Review
- Submit
- Confirmation & Next Steps

- **HMC Option C** Information Page
- **HMC Option B** DC6 FAQs
- **HMC Option A** Contextual Help

User selects "Back" to return to the form

Wireframe - Help Me Choose

DRAFT

NOT a final document
NOT DVTS compliant

Welcome, Jonathan Doe (Log Out)

Bundle   En Español   Search 🔍

StateFarm™   Insurance   Finances   Claims   Customer Care   My Accounts 🔒

Report a Claim

Current Process

1 Start Your Claim
2 Additional Details
3 Review

Your Agent
(Change)

John Smith
(812) 123-1234
Insurance, Bank,
[optional LOBs]
Email Agent
Visit Site
+ Agent Details

Need Assistance?
A representative is ready to answer your questions.

[Get help]

STEP 1 OF 3

Start Your Claim

Welcome, Jonathan

Before we begin, let's verify we have your correct contact information.

Your Contact Information

Name   Jonathan Doe

Mailing address   9876 22nd Ave
                             Bloomington, IL 61701 USA

                             ✏ Edit

Mobile (primary phone)   309-663-3232

Email address   johnd@gmail.com

                             ✏ Edit

Basic Details

What type of claim are you reporting?   ◯ Auto
Help me choose   ◯ Health
                                               ◯ Life
                                               ◯ Property

Auto – Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

Health– Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

Life– Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

Property– Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

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Bundle   En Español   Search 🔍

StateFarm™   Menu   My Accounts 🔒

STEP 1 OF 3

Start Your Claim

Welcome, Jonathan

Before we begin, let's verify we have your correct contact information.

Your Contact Information

Name
Jonathan Doe

Mailing Address
9876 22nd Ave
Bloomington, IL 61701 USA

✏ Edit

Mobile (primary phone)
309-663-3232

Home
309-663-1234

Email Address
johnd@gmail.com

✏ Edit

Basic Details

What type of claim are you reporting?
Help me choose

◯ Auto

◯ Property

◯ Health

◯ Life

Auto – Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

Health– Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

Life– Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volputate. Learn more

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Wireframe Notes

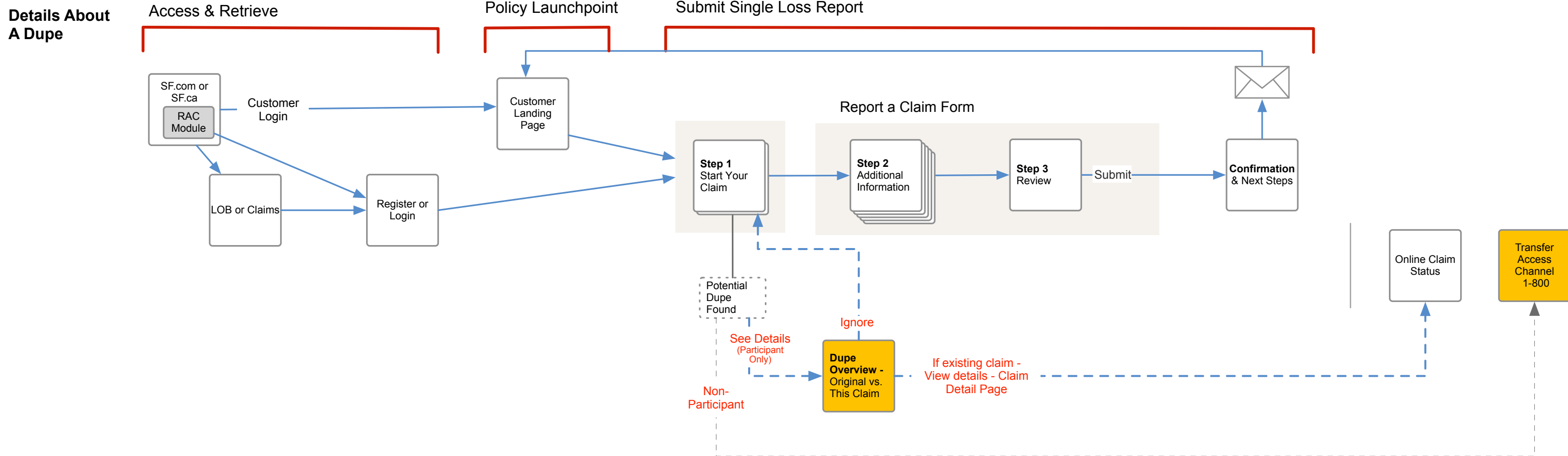Help me choose link enables a contextual help element.

Contextual help has descriptions for each choice further helping the user choose which best claim to choose.

The Learn more link will open in a second tab or screen.

Reference: Contextual Help

Conceptual Flows - Dupe Check

ACTION - Dupe Check	
Location	Step 1
Trigger	From the Dupe Check alert message, user clicks "See More"
Destination	Links to a path selection page that allows the user to a) switch to the original claim or b) ignore the message and continue creation of a new claim.

Details About A Dupe

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or SF.ca
RAC Module

Customer Login

Customer Landing Page

LOB or Claims

Register or Login

Report a Claim Form

Step 1 Start Your Claim

Step 2 Additional Information

Step 3 Review

Submit

Confirmation & Next Steps

Online Claim Status

Transfer Access Channel 1-800

Potential Dupe Found

See Details (Participant Only)

Ignore

Dupe Overview - Original vs. This Claim

If existing claim - View details - Claim Detail Page

Non-Participant

QUESTIONS

1. Is dupe check being performed against existing claims only? Yes. Can we also run against loss reports? No.
2. Is it possible that the system discovers multiple duplicates? Yes, and it would lead to transfer.
   If so, do we automatically transfer the user (whether participant or non-participant) to the Transfer Access Channel?

Wireframe - Dupe Check Notice

Policy Type

Policy Number

For security reasons, how would you like to identify the vehicle on the policy? ⓘ

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen? ⓘ

Approximately what time did this happen?

Hour   am

⚠ We found a possible duplicate report. See more

What is your relationship to the claim?

Were there any injuries?   ○ Yes   ○ No

Were there any fatalities?   ○ Yes   ○ No

Continue

Save & continue later   Cancel

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What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?

Approximately what time did this happen?

Hour   am

⚠ We found a possible duplicate report. See more

What is your relationship to the claim?

Were there any injuries?
○ Yes   ○ No

Were there any fatalities?
○ Yes   ○ No

Continue

Save & continue later   Cancel
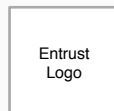
Report a Claim

Current Process

1 Start Your Claim

2 Additional Details

Screen Shot Notes

Trigger: User has entered the information necessary for the system to perform a background dupe check. A potential dupe has been found and the user is notified with inline messaging.

Wireframe - Dupe Check - Interstitial

Welcome, Jonathan Doe (Log Out)

Bundle En Español Search

StateFarm™

Insurance   Finances   Claims   Customer Care   My Accounts 🔒

We found duplicate information

Captured information are the same, except for:

Diff-   Date and Time of incident
         11-12-12 / 10:22 am

Show additional information   +

back   ignore   **Switch**

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We found duplicate information

Captured information are the same, except for:

Diff-   Date and Time of incident
         11-12-12 / 10:22 am

Show additional information   +

back   ignore   **Switch**

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Wireframe Notes

After the user has started their claim the user is alerted about a duplicate claim.

The claim flow can be either partial completion, pending or finished.

The user needs to select a claim in order to continue.

Wireframe - Transfer Access Channel

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NOT a final document
NOT DVTS compliant

Welcome, Jonathan Doe (Log Out)

Bundle   En Español   [Search]

StateFarm™

Insurance   Finances   Claims   Customer Care   My Accounts 🔒

Your Agent
(Change)

John Smith
(312) 123-123
Insurance, Bank,
[optional LOBs]

DC - 5

Email Agent
Visit Site
+ Agent Details

Need Assistance?
A representative is ready to answer your question.

DC - 6

Get help

Health Claim

A claim for this incident has already been submitted.

If you would like more information, or feel this is a not a duplicate, please call us toll-free at 1-800-555-1212.

[Return to [origination point]]

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Menu   My Accounts 🔒

Health Claim

A claim for this incident has already been submitted.

If you would like more information, or feel this is a not a duplicate, please call us toll-free at
1-800-555-1212.

[Return to [origination point]]

Your Agent
(Change)

John Smith
312-123-123
Insurance, Bank,
[optional LOBs]

DC - 5

Email Agent
Visit Site
+ Agent Details

Need Assistance?
A representative is ready to answer your questions.

DC - 6

Get help

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Wireframe Notes

Trigger: A non-participant is submitting a loss report and on Step 1 (Required Info) the system has dedicated a dupe
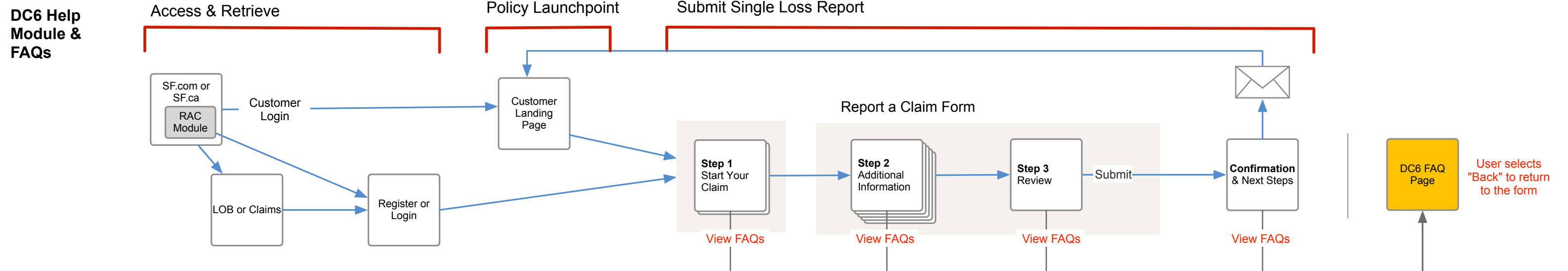
Note: This page terminates the report flow; the user cannot continue to file the claim.

Question: Should the user be given the opportunity to save progress up to this point? NO

Reference: Transfer Channel

Conceptual Flows - DC6 Help Module & FAQs

ACTION - DC6 Help Module link to FAQs	
Location	Any page
Trigger	User clicks "FAQs" or similar link from within the DC6 Help Module
Destination	Links to DC6 FAQs Page which houses all FAQs in expandable panels.

DC6 Help Module & FAQs

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

Report a Claim Form

SF.com or SF.ca
RAC Module

Customer Login

Customer Landing Page

LOB or Claims

Register or Login

Step 1
Start Your Claim

Step 2
Additional Information

Step 3
Review

Submit

Confirmation & Next Steps

View FAQs

View FAQs

View FAQs

View FAQs

DC6 FAQ Page

User selects "Back" to return to the form

Screen Shot - Existing FAQ Page

Account Login   Register

StateFarm®   Insurance   Mutual Funds   State Farm Bank®   Search statefarm.com

Home › About › Frequently Asked Questions

Frequently Asked Questions

About State Farm
Newsroom
Community Involvement
Disaster Response
Company Overview
Customer Ratings and Reviews
Diversity and Inclusion
Careers
Retirees
Contact Us
› Frequently Asked Questions

Online Insurance Accounts

› What is my User ID and/or Logon ID?

› Why am I unable to access/logon to my spouse's account online? We are listed on the same policy.

› Why can't I see my policy online? Why am I getting a message that I am not authorized to view the policy?

› Why am I unable to view my bank account online? I cannot see or click on my bank account.

› Why am I unable to access my business policy online?

› How can I print a new insurance card online?

› How can I print my declaration page online?

› Can I change my agent online?

› Can I change my coverage online?

› Can I add a driver to my account online?

› How do I start/stop paperless billing?

› Why is the system saying I have an amount due when I made the payment through my agent's office?

Claims

› What is the location or phone number to a claim office?

› How do I file a claim?

- There are several ways to file a claim. (Note: A policy number is required to file a claim.)
- You may file a claim by contacting your agent's office.
- You may utilize the Insurance Claim Center site.
- You may utilize the 'Non Registered Customers' or 'Not a State Farm Customer' option(s) on the Check the Status of a Claim site.
- You may also use the Claim Office Locator to locate a Claim Office near you.
- Smartphone users may use State Farm's mobile offerings, such as the Pocket Agent application or mobile website, to obtain a quote.

General

› What is the phone number to Customer Service?

› How do I cancel my policy?

› Is there a toll free number for a rate quote?

› Is my account number the same as my policy number?

› Where do I find information about Drive Safe and Save?

› Where do I find information about the Steer Clear Discount?

› Where do I locate a Personal Property Inventory Form?

› Where do I find information about employment opportunities or becoming a State Farm Agent?

Back to top

Screen Shot Notes

Trigger: User has clicked FAQs from the DC-6 Help Module.

Question: Will the Report a Claim FAQs be merged with the existing Claims FAQs?

Conceptual Flows - Cancel

ACTION - Cancel	
Location	Step 1, 2 or 3
Trigger	User clicks "Cancel" link
Destination	Triggers dialog box to confirm user's intent. If the user confirms intent to cancel, he is returned to the originating page.
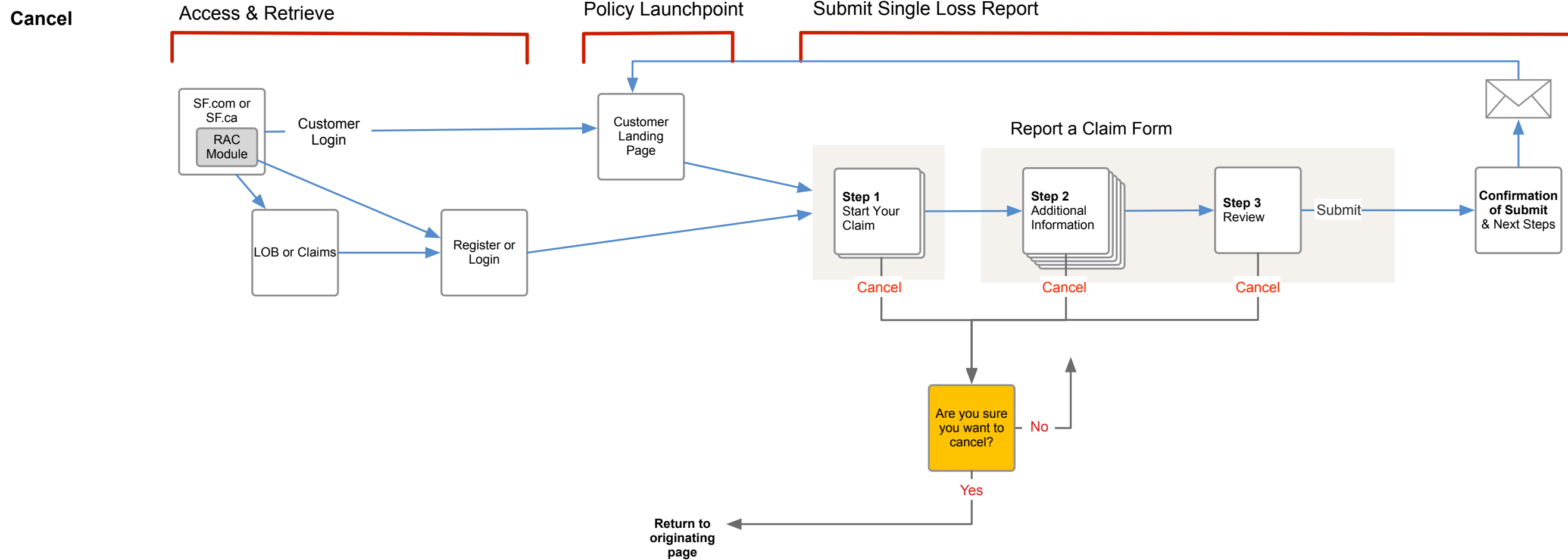
Cancel

POINT FOR CLARIFICATION/DISCUSSION
Canceling work done on a retrieved report should not reverts to the last saved version of the report.

Wireframe - Cancel

On which policy are you reporting this claim? ⑦

○ Policy Name
#11111111

○ Policy Name
#222222222

○ Policy Name
#333333333

○ Policy Name
#444444444

○ Policy Name
#555555555

○ Another policy not shown above

Type of loss ⑦

○ Hospital Income

○ LTC

● Disability

Incident Details

First date unable

Is this the result

Nature of inju

Continue

Save & continue later   **Cancel**

Are you sure? ✕

This erases everything you've entered so far. If you
need help, please contact an agent.

Do you want to quit this process?

- -

Yes, quit   **No, continue**

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Cancel   Stay Connected ☒ ☒ ☒ ☒ ☒

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#555555555

○ Another policy not shown above

Type of loss ⑦

○ Hospital Income

○ LTC

● Disability

Incident Details

First date unable to work?

| 10/17/12 | 🗓 |

Is this the result of sickness or injury?

○ Sickness

● Injury

Nature of injury? ⑦

Broken leg

Are you sure? ✕

This erases everything you've entered so
far. If you need help, please contact an
agent.

Do you want to quit this process?

- -

Yes, quit   **No, continue**

② Additional Details

③ Review

Your Agent
(Change)

John Smith
312-12--1234
Insurance, Bank,
[optional LOBs]
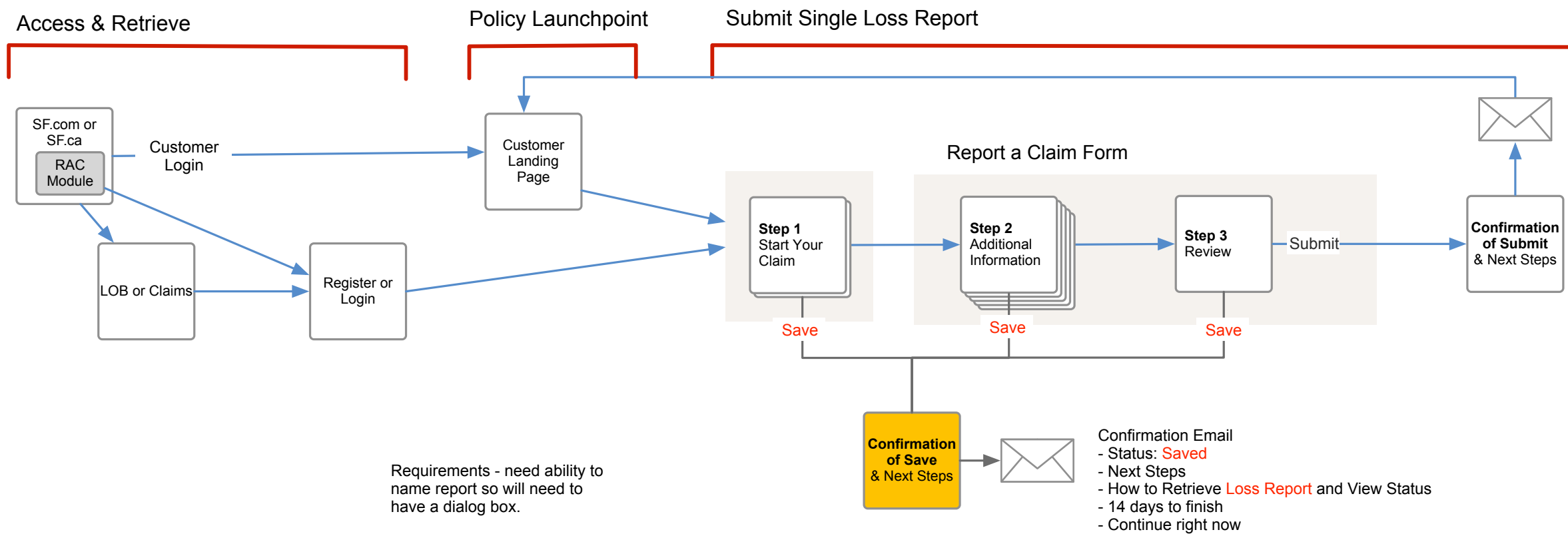
Email Agent

Wireframe Notes

After the user has started to fill out their claim and decides
to cancel, the page returns to the entry point where they
started.

Reference: Informational or Alert Modal

Conceptual Flows - Save & Continue Later

ACTION - Save & Continue Later	
Location	**Step 1** - After all required information has been entered on the page. **Step 2 or 3** - Available at any point.
Trigger	User clicks "Save & Continue Later" link
Destination	Submit Confirmation Page

Save & Continue Later

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or SF.ca

RAC Module

Customer Login

LOB or Claims

Register or Login

Customer Landing Page

Report a Claim Form

Step 1 Start Your Claim

Step 2 Additional Information

Step 3 Review

Submit

Confirmation of Submit & Next Steps

Save

Save

Save

Confirmation of Save & Next Steps

Requirements - need ability to name report so will need to have a dialog box.

Under 20 characters.
Do you want to continue now or save and continue later?

Confirmation Email
- Status: Saved
- Next Steps
- How to Retrieve Loss Report and View Status
- 14 days to finish
- Continue right now

Wireframe - Save & Continue Later

Welcome, Jonathan Doe (Log Out)

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Report a Claim

Current Process

1 Start Your Claim
2 Additional Details
3 Review

Your Agent
(Change)

John Smith
(312) 123-123[
Insurance, Ba[,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

DC - 5

Need Assistance?
A representative is
ready to answer your
questions.

Get help

HEALTH CLAIM

Your Loss Report Has Been Saved.

Your loss report has been saved, but it is not yet submitted. It will be saved in the system for 14 days. You can return to view and edit the loss report any time before then.

📄 Save as PDF

How do I retrieve my loss report?
The loss report has been added to the information in your landing page. This link is also available in the confirmation email we have just sent to the email address you provided.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim   My landing page   Return to [origination point]

🖨 Print

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Wireframe Notes

Trigger: User has clicked Save & Continue Later

Note: The option to save is available at any point after the required information has been entered.

Question: Which specific page will the user be returning to in order to retrieve the loss report?
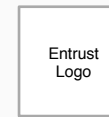
DC - 6

Get help

Stay Connected

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Wireframe - Save & Retrieve

Policy Type

Policy Number

For security reasons, how would you like to identify the vehicle on the policy? ?

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen? ?

Approximately what time did this happen?   Hour   am

What is your rela

Were there any i

Were there any f

Save Loss Report   ×

Provide a name for this loss report. We'll send an email soon with instruction for retrieving this loss report.

Save   Cancel

Continue

Save & continue later   Cancel

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What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?

Approximately what time did this happen?
Hour   am

Save Loss Report   ×

Provide a name for this loss report. We'll send an email soon with instruction for retrieving this loss report.

Save   Cancel

Continue

Save & continue later   Cancel

Report a Claim

Current Process

1 Start Your Claim

2 Additional Details

Wireframe Notes

User clicks on 'Save and Continue' .
The system prompts the user to provider a name in order to save the Loss Report.

Wireframe - Save Successfully

Policy Type

Policy Number

For security reasons, how would you like to identify the vehicle on the policy? ⍰

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen? ⍰

Approximately what time did this happen?
Hour | am

What is your rela...

Were there any i...

Were there any f...

Continue

Save & continue later   Cancel

Loss Report Saved Successfully ✕

Your Loss Report was saved successfully as <Name>. We'll follow up with an email that contains instructions for retrieving and continuing to file the loss report. You can access this Loss Report online for the next 14 days.

Exit   Continue   **Claims Page**

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What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?

Approximately what time did this happen?
Hour | am

Loss Report Saved Successfully ✕

Your Loss Report was saved successfully as <Name>. We'll follow up with an email that contains instructions for retrieving and continuing to file the loss report. You can access this Loss Report online for the next 14 days.

Exit   Continue   **Claims Page**

Continue

Save & continue later   Cancel

Report a Claim

Current Process

1 Start Your Claim

2 Additional Details

Wireframe Notes

On save the system shows the user with a Save Successful message.

Wireframe - Save Warning

Policy Type

Policy Number

For security reasons, how would you like
to identify the vehicle on the policy? ⓘ

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen? ⓘ

Approximately what time did this happen?   Hour ▾ am ▾

What is your rela

Were there any i

Were there any f

Continue

Save & continue

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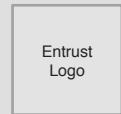
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Save Warning! ✕

Please note that before you start this Report Claim
process, the ability to save is disabled because you
have exceeded the **limit of 5** saved loss reports. In
order to save this Loss Report you may have to delete
or submit the previous saved loss reports.

**Do you want to delete or submit the previous saved
loss reports now?**

Yes   No, I want to continue

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?

Approximately what time did this happen?
Hour ▾ am ▾

Save Warning! ✕

Please note that before you start this
Report Claim process, the ability to
save is disabled because you have
exceeded the **limit of 5** saved loss
reports. In order to save this Loss
Report you may have to delete or
submit the previous saved loss reports.

**Do you want to delete or submit the
previous saved loss reports now?**

Yes   No, I want to continue

Save & continue later   Cancel

Report a Claim

Current Process

1 Start Your Claim

2 Additional Details

Wireframe Notes

User starts a new loss report, however he/she already has
5 saved loss reports. The system prompts the user that he
already has 5 saved loss reports and will not be able to
save any report further and some action is needed.

Wireframe - Can't Be Saved

Policy Type

Policy Number

For security reasons, how would you like to identify the vehicle on the policy? ⑦

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen? ⑦

Approximately what time did this happen?   Hour ▾   am ▾

What is your rela

Were there any i

Were there any f

Continue

Save & continue later   Cancel

Sorry, we weren't able to Save your Loss Report   ✕

Something's not working on our end and we're fixing it right now. In order to continue this process please choose 'Continue' or Exit to quit this process.

- -

Continue   **Exit**

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What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?   🗓

Approximately what time did this happen?

Hour ▾   am ▾

Sorry, we weren't able to Save your Loss Report   ✕

Something's not working on our end and we're fixing it right now. In order to continue this process please choose 'Continue' or Exit to quit this process.

- -

Continue   **Exit**

Continue

Save & continue later   Cancel

Report a Claim

Current Process

① Start Your Claim

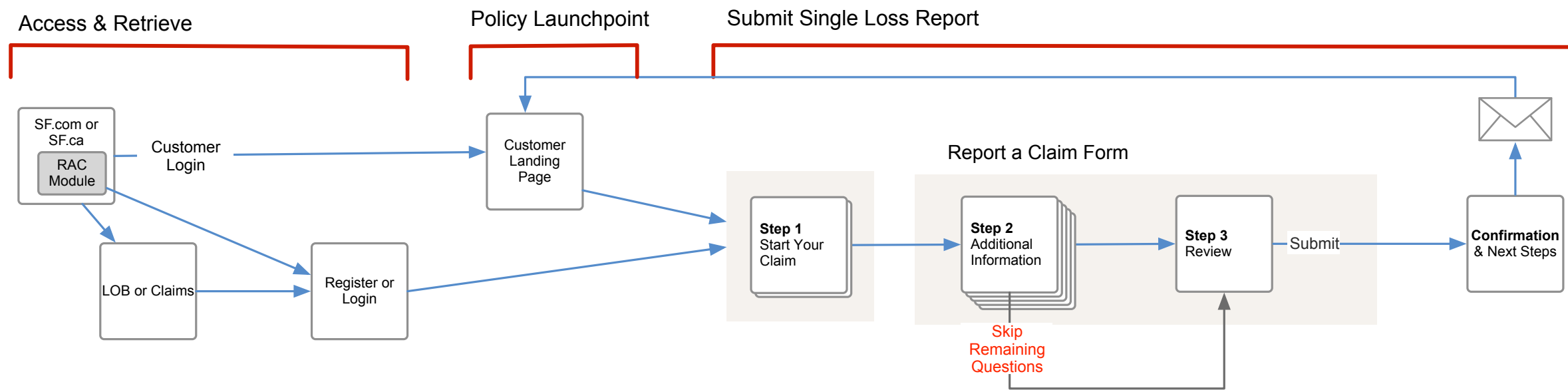② Additional Details

---

Wireframe Notes

If Loss Reports cannot be saved for technical reasons.

Conceptual Flows - Skip Remaining Questions

ACTION - Skip Remaining Questions	
Location	Step 2 page(s)
Trigger	User clicks Skip Remaining Questions link.
Destination	Advances user to the Review page.

Skip Remaining Questions

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or SF.ca

RAC Module

Customer Login

LOB or Claims

Register or Login

Customer Landing Page

Report a Claim Form

Step 1 Start Your Claim

Step 2 Additional Information

Skip Remaining Questions

Step 3 Review

Submit

Confirmation & Next Steps

Conceptual Flows - Edit

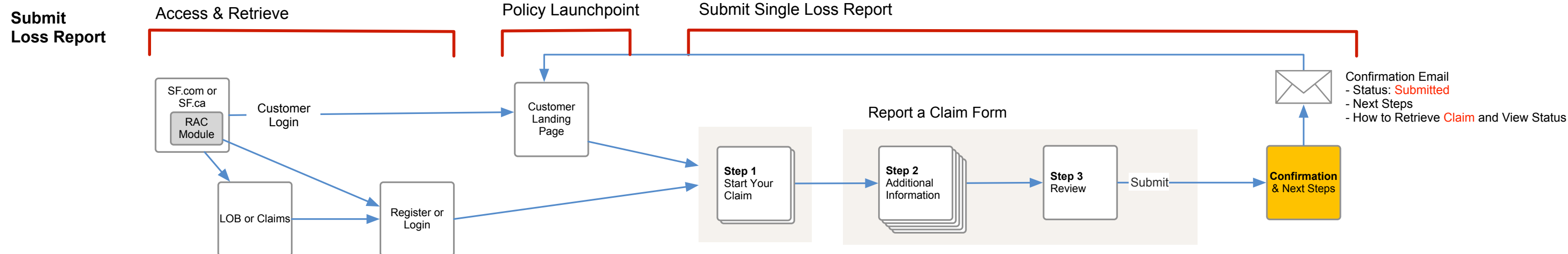| ACTION - Edit	
Location	**Review** - The review page offers the ability to edit sections of information.
Trigger	User clicks one of the "Edit" links
Destination	Returns to a page within Step 2

Save & Continue Later

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or SF.ca

RAC Module

Customer Login

LOB or Claims

Register or Login

Customer Landing Page

Report a Claim Form

Step 1
Start Your Claim

Step 2
Additional Information

Step 3
Review

Edit

Submit

Confirmation of Submit & Next Steps
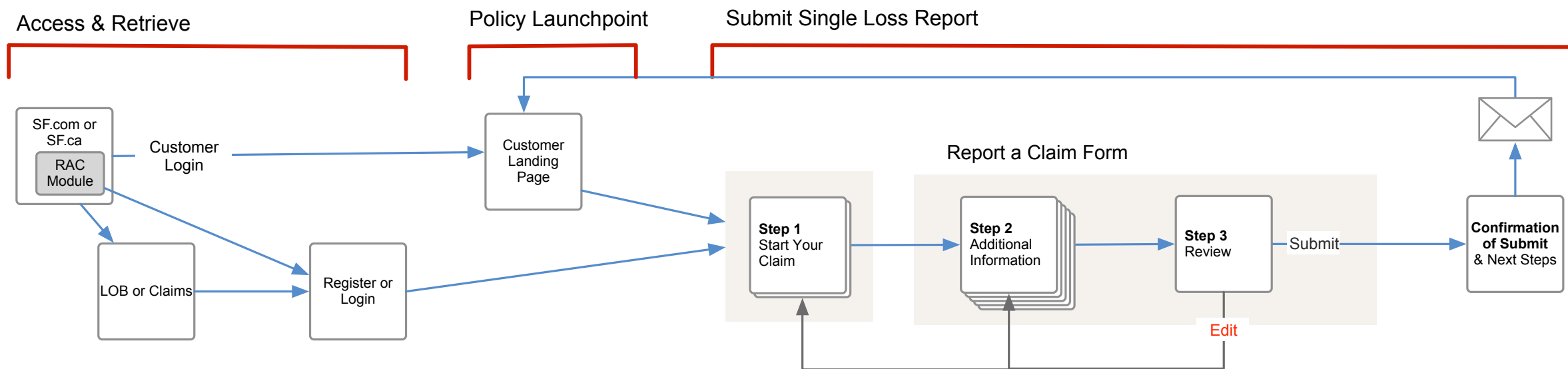
Conceptual Flows - Continue & Submit

ACTION - Continue & Submit	
Location	**Continue** - Steps 1 and 2 **Submit** - Step 3
Trigger	Use clicks the primary CTA (Continue or Submit) on each page.
Destination	Submit Confirmation Page

Submit Loss Report

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or SF.ca — RAC Module

Customer Login

LOB or Claims

Register or Login

Customer Landing Page

Report a Claim Form

Step 1 Start Your Claim

Step 2 Additional Information

Step 3 Review

Submit

Confirmation & Next Steps

Confirmation Email
- Status: Submitted
- Next Steps
- How to Retrieve Claim and View Status

Wireframe - Submitted - Claim # Issued

Welcome, Jonathan Doe (Log Out)

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Report a Claim

Current Process

1 Start Your Claim

2 Additional Details

3 Review

Your Agent
(Change)

John Smith
(312) 123-1234
Insurance, Bank,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

Need Assistance?
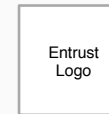A representative is ready to answer your questions.

Get help

HEALTH CLAIM

Your Loss Report Has Been Submitted.

Injury Claim # xxxxxxxx is in process.

📄 Save as PDF

What happens next?

If you entered the optional details on the Additional Information screen, we will begin processing your claim immediately. If you decided to skip that step, your agent will be in touch to ask you a few questions.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim   My landing page   Return to [origination point]

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Wireframe - Submitted - Pending Review

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Report a Claim

Current Process

① Start Your Claim

② Additional Details

❸ Review

Your Agent
(Change)

John Smith
(12) 123-123-5
Insurance, Ba...,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

Need Assistance?
A representative is
ready to answer your
questions.

[Get help]

HEALTH CLAIM

Your Loss Report Has Been Submitted.

Your Injury Claim has been submitted and is pending review. We will notify you via email when a claim number has been assigned. In the meantime, you can check the status of your loss report on your landing page.

📄 Save as PDF

What happens next?

If you entered the optional details on the Additional Information screen, we will begin processing your claim immediately. If you decided to skip that step, your agent will be in touch to ask you a few questions.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim   My landing page   Return to [origination point]

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A representative is ready to answer your questions.

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Get help

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Archive

Wireframe - Submitted - Pending Review 2

Welcome, Jonathan Doe (Log Out)

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Report a Claim

Current Process

1 Start Your Claim
2 Additional Details
3 Review

Your Agent
(Change)

John Smith
(312) 123-123
Insurance, Ba...,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

Need Assistance?
A representative is ready to answer your questions.

Get help

HEALTH CLAIM

Your Loss Report Has Been Submitted.

Your Injury Claim has been submitted and is pending review. We will notify you via email when a claim number has been assigned. In the meantime, you can check the status of your loss report on your landing page.

What happens next?

If you entered the optional details on the Additional Information screen, we will begin processing your claim immediately. If you decided to skip that step, your agent will be in touch to ask you a few questions.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim | My landing page | Return to [origination point]

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HEALTH CLAIM

Your Loss Report Has Been Submitted.

Your Injury Claim has been submitted and is pending review. We will notify you via email when a claim number has been assigned. In the meantime, you can check the status of your loss report on your landing page.

What happens next?

If you entered the optional details on the Additional Information screen, we will begin processing your claim immediately. If you decided to skip that step, your agent will be in touch to ask you a few questions.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim | My landing page

Return to [origination point]

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Report a Claim

Current Process

1 Start Your Claim
2 Additional Details
3 Review

Your Agent
(Change)

John Smith
312-123-123
Insurance, B...,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

Need Assistance?

A representative is ready to answer your questions.

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Get help

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Wireframe - Submitted - Claim # Issued 2

Welcome, Jonathan Doe (Log Out)

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Report a Claim

Current Process

① Start Your Claim

② Additional Details

③ Review

Your Agent
(Change)

John Smith
(812) 123-123
Insurance, Bank,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

Need Assistance?
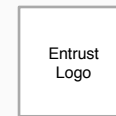A representative is ready to answer your questions.

[Get help]

HEALTH CLAIM

Your Loss Report Has Been Submitted.

Injury Claim # xxxxxxxx is in process.

What happens next?

If you entered the optional details on the Additional Information screen, we will begin processing your claim immediately. If you decided to skip that step, your agent will be in touch to ask you a few questions.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim   My landing page   Return to [origination point]

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Wireframe - Save & Continue Later 1

Welcome, Jonathan Doe (Log Out)

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Report a Claim

Current Process

1 Start Your Claim
2 Additional Details
3 **Review**

Your Agent
(Change)

John Smith
(312) 123-123
Insurance, Bank,
[optional LOBs]

Email Agent
Visit Site
+ Agent Details

DC - 5

Need Assistance?
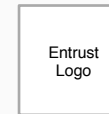A representative is ready to answer your questions.

[Get help]

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HEALTH CLAIM

Your Loss Report Has Been Saved.

Your loss report has been saved, but it is not yet submitted. It will be saved in the system for 14 days. You can return to view and edit the loss report any time before then.

How do I retrieve my loss report?
The loss report has been added to the information in your landing page. This link is also available in the confirmation email we have just sent to the email address you provided.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim   My landing page   Return to [origination point]

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HEALTH CLAIM

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How do I retrieve my loss report?
The loss report has been added to the information in your landing page. This link is also available in the confirmation email we have just sent to the email address you provided.

We are here to help and will do everything we can to process your claim in a timely fashion. In the meantime, if you have any questions, please call us toll-free at 1-800-555-1212 or talk to your agent.

Start a new claim   My landing page

Return to [origination point]

🖨 Print 📄 Save as PDF

Report a Claim

Current Process

1 Start Your Claim
2 Additional Details
3 **Review**

Your Agent
(Change)

John Smith
31-123-123
urance, B..k,
[optional LOBs]

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Email Agent
Visit Site
+ Agent Details

Need Assistance?
A representative is ready to answer your questions.

Wireframe Notes

Trigger: User has clicked Save & Continue Later

Note: The option to save is available at any point after the required information has been entered.

Question: Which specific page will the user be returning to in order to retrieve the loss report?

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Get help

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Wireframe - Dupe Check Notice - Modal

Policy Type

Policy Number

For security reasons, how would you like to identify the vehicle on the policy? ⌗

What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?

Approximately what time did this happen?

Hour ▾ Minute ▾ am ▾

⚠ We found u...

We found duplicate information ✕

Captured information are the same, except for:

Diff-　　Date and Time of incident
　　　　11-12-12 / 10:22 am

- - - - - - - - - - - - - - - - -

Switch　Ignore

What is your relati...

Were there any in...

Were there any fa...

Continue

Double check your information before proceeding.

Save & continue later　　**Cancel**

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What is the year of the vehicle?

What is the make of the vehicle?

What is the model of the vehicle?

What is the type of loss?

What day did this happen?

Approximately what time did this happen?

Hour ▾ Minute ▾ am ▾

We found duplicate information ✕

Captured information are the same, except for:

Diff-　　Date and Time of incident
　　　　11-12-12 / 10:22 am

- - - - - - - - - - - - - - - - -

Switch　Ignore

Continue

Double check your information before proceeding.

Save & continue later　　**Cancel**

Report a Claim

Current Process

① Start Your Claim

② Additional Details
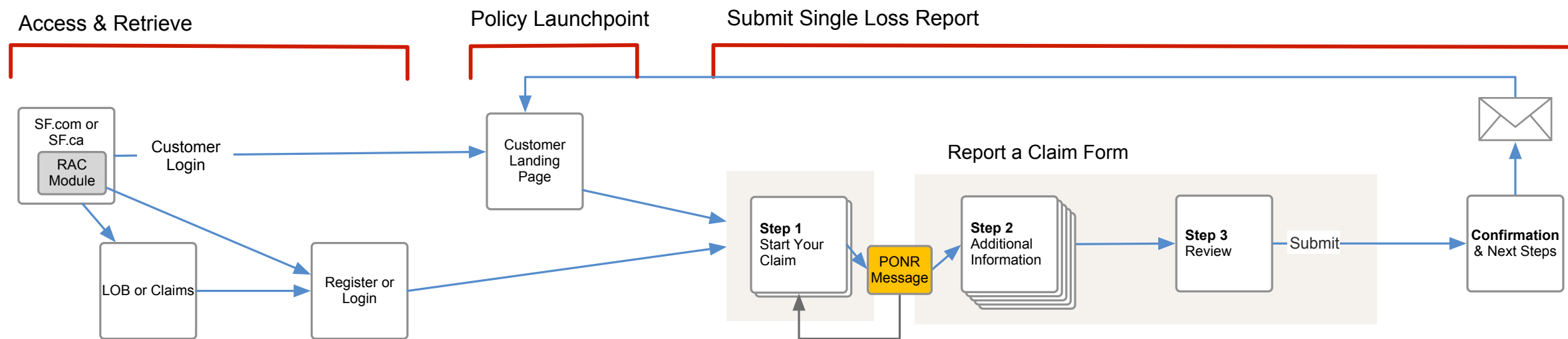
Screen Shot Notes

Trigger: User has entered the information necessary for the system to perform a background dupe check. A potential dupe has been found and the user is notified with inline messaging.

Conceptual Flows - Point Of No Return

ACTION - Point Of No Return	
Location	Step 1
Trigger	User clicks "Continue" button
Destination	Reveals inline messaging that information cannot be edited beyond the current page.

Details About A Dupe

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or SF.ca

RAC Module

Customer Login

LOB or Claims

Register or Login

Customer Landing Page

Report a Claim Form

Step 1 Start Your Claim

PONR Message

Step 2 Additional Information

Step 3 Review

Submit

Confirmation & Next Steps

Wireframe - Point of No Return

On which policy are you reporting this claim? (?)

○ Policy Name
  #11111111
○ Policy Name
  #222222222
○ Policy Name
  #333333333
○ Policy Name
  #444444444
○ Policy Name
  #555555555
○ Another policy not shown above

Type of loss (?)

○ Hospital Income
○ LTC
● Disability

Incident Details

First date unable...

Is this the result...

Nature of injur...

Point of no Return ✕

Is everything correct?

The information above is required to start your claim and cannot later be revised without the help of your agent.

[Everything is accurate] [I'll check again]

[Continue]

Cancel

○ Another policy not shown above

Type of loss (?)

○ Hospital Income
○ LTC
● Disability

Incident Details

First date unable to work?

[10/17/12] [📅]

Is this the result of sickness or injury?

○ Sickness
● Injury

Nature of injury? (?)

[Broken leg]

Point of no Return ✕

Is everything correct?

The information above is required to start your claim and cannot later be revised without the help of your agent.

[Everything is accurate] [I'll check again]

① Start Your Claim
② Additional Details
③ Review

Your Agent
(Change)

John Smith
31?-12?-12?4
Insurance, Bank,
[optional LOBs]

Email Agent

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Cancel

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Wireframe Notes

Trigger: User has clicked Continue and is notified that changes cannot be made to this information beyond this page.

Note: Validation of the fields (and resulting inline contextual feedback regarding errors or required fields) is normally all triggered by the continue button.

Question: If Continue triggers both validation (& subsequent error messages) & PONR (message at bottom), can we first present validation messaging and save the PONR message for the last notification

Reference: Informational or Alert Modal

Wireframe - Dupe Check Detail Page

DRAFT

NOT a final document
NOT DVTS compliant

Welcome, Jonathan Doe (Log Out)

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We found a duplicate with the following information.

Please review the captured information and select a claim to continue with.

Original claim

✅ Policy Holder First & Last Name
Jonathan Doe

✅ Claim Type
Auto

✅ Type of Loss
Stolen car stereo

Date & Approximate Time
11-12-12 / 10:22 am

✅ Claim Status
Partial completion

Show additional information ＋

[Switch to original claim]

Today's claim

✅ Policy Holder First & Last Name
Jonathan Doe

✅ Claim Type
Auto

✅ Type of Loss
Stolen car stereo

Date & Approximate Time
11-13-12 / 12:15 pm

✅ Claim Status
Partial completion

Show additional information ＋

[Continue with]

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We found a duplicate with the following information.

Please review the captured information and select a claim to continue with.

Original claim

✅ Policy Holder First & Last Name
Jonathan Doe

✅ Claim Type
Auto

✅ Type of Loss
Stolen car stereo

Date & Approximate Time
11-12-12 / 10:22 am

✅ Claim Status
Partial completion

Show additional information ＋

[Switch to original claim]

Today's claim

✅ Policy Holder First & Last Name
Jonathan Doe

✅ Claim Type
Auto

✅ Type of Loss
Stolen car stereo

Date & Approximate Time
11-13-12 / 12:15 pm

✅ Claim Status
Partial completion

Show additional information ＋

Wireframe Notes

After the user has started their claim the user is alerted about a duplicate claim.

The claim flow can be either partial completion, pending or finished.

The user needs to select a claim in order to continue.

Continue with

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Conceptual Flows - Retrieve

**Retrieve
Loss Report**

Access & Retrieve

Policy Launchpoint

Submit Single Loss Report

SF.com or
SF.ca

Customer
Login

Customer
Landing
Page

Report a Claim Form

LOB or Claims

Register or
Login

Step 1
Start Your
Claim

Step 2
Additional
Information

Step 3
Review

Submit

Confirmation
& Next Steps

Saved Loss
Report
Confirmation
OR
Reminder

PVC

Confirmation Email
- Status: Submitted
- Next Steps
- How to Retrieve Claim and View Status