

Visualized ISO ClaimSearch® Administrator FAQ

This document is intended for administrators and addresses system connectivity and integration plus workflow.

Information for ISO ClaimSearch® end users, including claims support staff, claim handlers and leadership, and SIU staff, can be found in the user FAQ document.

WHAT IS VISUALIZED ISO CLAIMSEARCH?

ISO ClaimSearch® loss history reports (also known as match reports) have been redesigned and are now displayed on a new, visualized platform that provides actionable insights into your company’s claims. Just as with the former loss history report, you can access visualized ISO ClaimSearch directly in your system or via Claims Reporting on our website. The new reports are graphical, interactive, and easy to navigate. **ISO ClaimSearch is transitioning all its database subscribers to the new platform, and the old platform will no longer be available. This change will affect all users.**

- Visualized ISO ClaimSearch match reports include alerts that highlight potential issues within the claim, quick links to additional data sources, a loss history timeline, historical claim versioning and audit capability, and increased data security.

- Your company accesses claim details through a Software as a Service (SaaS) environment, which significantly reduces IT dependencies and allows users to benefit from new enhancements as soon as they become available.
- You can seamlessly access and interact with ISO ClaimSearch within your own claim system thanks to single sign-on capabilities.
- In addition to these benefits, visualized ISO ClaimSearch provides added data protection: the data does not leave ISO's care, custody, and control; printing is redacted; and personally identifiable information (PII) is masked (except for SIU users).

WHAT IS A MATCH REPORT?

A match report (or loss history report) is a list of all matching claims identified within the ISO ClaimSearch database using certain searchable criteria, such as an individual's name and address, vehicle identification number (VIN), Social Security number (SSN), and other identifying data. Visualized ISO ClaimSearch provides a five-year claim history for each search with the exception of workers' compensation claims and valid VIN searches. Companies can opt to remove the five-year limitation on searches within visualized ISO ClaimSearch upon request.

The information generated in the match reports assists claims handlers in determining the best course of action for a claim, such as fast-tracking to payment or sending to a special investigation unit (SIU) for further investigation. *For additional details, see the ISO ClaimSearch User Manual.*

WHY THE CHANGE TO VISUALIZED?

Our insurance industry advisory groups challenged us to reimagine our traditional match report to provide more value, efficiency, and data protection. ISO ClaimSearch is transitioning all its database subscribers to the new visualized experience. **Web users transitioned June 11, 2018. All users will transition by July 1, 2019.**

The results include:

- real-time analytics
- a visually appealing user experience similar to popular Internet and social media sites
- actionable intelligence
- SaaS delivery (to minimize IT impact and facilitate future enhancements)
- robust security and privacy protection

- business intelligence dashboards to understand usage patterns and claim alerts in real time
- seamless integration into customer workflows and claims systems

HOW DOES THE NEW VISUALIZED REPORT COMPARE WITH THE TRADITIONAL REPORT?

Traditional ISO ClaimSearch match reports were accessed in numerous ways: Some customers received match reports on the web, others received PDF match reports attached to the claim, while still others used XML style sheets to transform data into reports or created their own version of a report with the data provided. Visualized ISO ClaimSearch replaces all these methods with a more insight-driven report.

Feature	New Visualized ISO ClaimSearch Report	Traditional ISO ClaimSearch Report
Data Displayed	Yes (Based on data contributed – No limitations)	Yes (Based on data contributed – No limitations)
Print Capability	Yes (Summarized view with enhanced data protection redaction)	Yes
Five-Year Loss History Period	Yes (Full database lookback available via Claims Inquiry)	Yes (Full database lookback available via Claims Inquiry)
Audit Trail Capability	Yes	No
ISO ClaimAlert™ Business Intelligence Dashboard	Yes	No
Google® Mapping Feature, including Street View	Yes	No
Interactive Visual Timeline	Yes	No
Digital Photo Sharing	Yes	No
Adverse Carrier Alert	Yes	No
Visual Risk Indicator (Red, Yellow, Green)	Yes	No
Enhanced Data Protection	Yes (Partial masking of all personal information)	No (Partial masking of SSN only)
Single Sign-On Capability	Yes	No
Seamless Integrated Access to Other Verisk ISO Products	Yes	No
Embedded Interactive eLearning Tools	Yes	No
Software as A Service (SaaS) Delivery	Yes	No

Unlimited Data Retention and Storage	Yes	No
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WHICH CLAIMS ARE NOW VISUALIZED?

Your company will receive a visualized ISO ClaimSearch match report for any new (or replacement) claims submitted on or after January 1, 2016.

If you want to see a visualized report for older claims, you can replace the prior claim through the edit function available to authorized users through the Claims Reporting tile on the home page.

Please note: Your company is not permitted to search claims by other companies. You may view only match reports for the company (or affiliate companies) with which your ISO ClaimSearch ID is associated.

If the claim has not yet been reported to ISO ClaimSearch (i.e., your company reports via an overnight batch process), you may not be able to search your claim until the following day. Claims that were rejected due to one or more errors also will not be available until they are corrected and successfully resubmitted.

WHO HAS ACCESS TO VISUALIZED ISO CLAIMSEARCH TODAY?

All users with access to Claims Reporting or Claims Inquiry (the investigations query that allows you to search any specific field of information) on the ISO ClaimSearch website can access the visualized platform. Administrators can create new IDs or reactivate existing IDs to ensure all your users are able to use the new solution. For more information, contact NJSupport@iso.com.

WHAT DATE MUST I SWITCH TO VISUALIZED ISO CLAIMSEARCH?

If your company receives its match reports on the ISO ClaimSearch website, you were automatically transitioned to visualized ISO ClaimSearch on **June 11, 2018**. The platform is available to all website users via the “Search My Claims” search box and via a link in the traditional match report. The traditional match report is no longer available.

If your company currently receives PDF output through a system-to-system feed, the PDF match reports will no longer be available as of **July 1, 2019**.

In addition, XML style sheets will not be supported or enhanced. All customers should plan to use visualized ISO ClaimSearch as soon as possible to gain the benefits of the new platform.

We will work with all customers to transition to visualized ISO ClaimSearch. Users who handle individual claim investigations (adjusters, claim reps, SIU) will use visualized ISO ClaimSearch instead of the current output method (web, PDF, XML style sheet, or homegrown match reports).

ARE THE CLAIMS IN THE VISUALIZED MATCH REPORT DIFFERENT FROM THE PDF?

For customers that submit batch files via FTP and receive a ZIP file via FTP containing individual PDF match reports for each claim, the PDF match reports will no longer be available as of July 1, 2019. If your company has a process that prints and distributes the PDF match reports to users, or if you save the reports to an imaging system or within your claim system, you should assess the impact of these changes.

Visualized ISO ClaimSearch is designed for each adjuster to have his or her own login ID to access the platform to see the claim history. Your company may need to add users with access to visualized ISO ClaimSearch.

The report you receive in visualized ISO ClaimSearch is generated from the same matching claims that you currently receive through the claims reporting process (all methods). There is no difference in the claims returned, no matter which output is used (i.e., PDF or visualized ISO ClaimSearch).

HOW DO THESE CHANGES AFFECT REPORTING VIA THE WEB ON THE ISO CLAIMSEARCH WEBSITE?

All customers that report claims manually via the ISO ClaimSearch website have been redirected to visualized ISO ClaimSearch to view the matching claims as of June 11, 2018.

The new Reports Summary Screen will show a red, yellow, green indicator (*see INDICATORS – WHAT DO THE COLORS MEAN?*).

CLAIM SUBMISSION PREFERENCES **MY CLAIM REPORTS** MY OFFICE REPORTS

Match Reports will no longer display on this list 30 days after submission. The claims will remain in the ISO ClaimSearch system indefinitely.

CLAIMSEARCH INDICATOR	DATE REPORTED	DATE OF LOSS	CLAIM NUMBER	ADJUSTER NAME	CLAIMDIRECTOR SCORE
!	06/29/2018 03:14:45 PM	06/02/2018	CSTR0006072018A	WARD, KAREN	
!	06/29/2018 02:58:10 PM	02/02/2018	CSTR000HAIL2	WARD, KAREN	
!	06/29/2018 02:58:10 PM	01/01/2018	CSTR000HAIL	WARD, KAREN	
!	06/29/2018 02:58:10 PM	09/15/2017	CSTR00088	KAREN, WARD	
!	06/29/2018 02:58:10 PM	06/10/2018	CSTR0006132018B	WARD, KAREN	
!	06/29/2018 02:58:10 PM	02/02/2018	DISABILITYSAMPLE1	WARD, KAREN	
!	06/22/2018 03:53:08 PM	04/01/2018	CSTRPROP	WARD, KAREN	
✓	06/12/2018 06:14:54 PM	06/10/2018	GREEN	WARD, KAREN	
✓	06/04/2018 08:20:46 PM	01/01/2018	CYBERDRAFT2	WARD, KAREN	

The PRINT function has changed and will allow only for a redacted print report that does not contain any personally identifiable information (PII).

🏠 SUMMARY
🕒 VIEW HISTORY
✎ EDIT CLAIM
🔄 REFRESH CLAIM
🖨️ PRINT CLAIM

7/1/2018

ISO ClaimSearch



Claim Number CSTR000HAIL
 ISO File Number 8X004601048
 Reported By X91400001
 Printed On 07/01/2018 at 3:47 pm
 Printed By Karen Ward
 Date Of Loss 01/01/2018
 Number of Alerts 2
 Number of Matches 33
 Policy Type Homeowners
 Policy Number CSTR000HAIL
 Loss Description HAIL

78 SUMMIT AVE JERSEY CITY NJ 07304 - Location Of Loss

CAMERON COLE - Both Claimant and Insured

 Prior SIU Involvement

DATE OF LOSS	TYPE	DESCRIPTION	COMPANY	CLAIM NUMBER	MATCH REASON
06/27/2018	Workers Comp & Employers Liability	EE FELL IN HOLE IN STREET WHILE PAVING	SAFETY INC	CSTR00006292018	Name
06/20/2018	Commercial Auto	IV R/E OV	SAFETY INC	CSTR00006222018	Name
06/19/2018	General Liability	SLIP & FALL	USA GROUP	CSTR00006212018	Name
06/18/2018	Personal Auto	IV R/E OV	ADJUSTERS INC	CSTR00006222018A	Name
06/15/2018	General Liability	PLAINTIFF/CLAIMANT FELL IN HOLE IN STREET	USA GROUP	CSTR00006152018	Name
06/05/2018	Commercial Auto	IV R/E OV	USA GROUP	CSTR00006082018	Name
06/01/2018	General Liability	FALL	P&C ASSURANCE	5	Name
05/31/2018	Homeowners	HAIL	AMERICAN INSURANCE	CSTR00006072018	Name

<https://claimsearch-cdn.iso.com/claimscloud/?v=1530471804089#/report/8X004601048/print?index=matchreports-x914&reportSrc=myclaim>

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HOW DO THESE CHANGES AFFECT REPORTING VIA FTP OR MQ?

All web match reports have been automatically redirected to visualized ISO ClaimSearch to view the matching claims as of June 11, 2018. A new summary screen will show a red, yellow, green indicator (see *INDICATORS – WHAT DO THE COLORS MEAN?*).

CLAIM SUBMISSION PREFERENCES **MY CLAIM REPORTS** MY OFFICE REPORTS

Match Reports will no longer display on this list 30 days after submission. The claims will remain in the ISO ClaimSearch system indefinitely.

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!	06/29/2018 02:58:10 PM	01/01/2018	CSTR000HAIL	WARD, KAREN	
!	06/29/2018 02:58:10 PM	09/15/2017	CSTR00088	KAREN, WARD	
!	06/29/2018 02:58:10 PM	06/10/2018	CSTR00006132018B	WARD, KAREN	
!	06/29/2018 02:58:10 PM	02/02/2018	DISABILITYSAMPLE1	WARD, KAREN	
!	06/22/2018 03:53:08 PM	04/01/2018	CSTRPROP	WARD, KAREN	
✓	06/12/2018 06:14:54 PM	06/10/2018	GREEN	WARD, KAREN	
✓	06/04/2018 08:20:46 PM	01/01/2018	CYBERDRAFT2	WARD, KAREN	

If your company currently has a designated person(s) who prints and distributes match reports to users, or if you save the reports to an imaging system or within your claim system, you should assess the impact of these changes because the PRINT function has changed and will allow only for a redacted print report that does not contain personally identifiable information (PII).

Each adjuster has his or her own login ID and can access visualized ISO ClaimSearch to see the claim history. If your company has been using a centralized person to print and distribute the match reports, you may need to add users with access to visualized ISO ClaimSearch.

Administrators can create new IDs or reactivate IDs to ensure that users will be able to use the new solution. For more information on administrator functions, contact NJSupport@iso.com. If your company requires training on the new solution, please contact us at info.claimsearch@iso.com.

HOW DO THESE CHANGES AFFECT COMPANIES THAT SUBMIT CLAIMS VIA FTP INTERFACE AND RECEIVE PDF OUTPUT?

PDF match reports will no longer be available as of July 1, 2019. All customers that receive PDF output should plan to switch to visualized ISO ClaimSearch before that date.

If your company has a process that prints and distributes the PDF match reports to users, or if you save the reports to an imaging system or your claim system, you should assess the impact of these changes.

Each adjuster will have his or her own login ID to access visualized ISO ClaimSearch to see the claim history. You may need to add users with access to visualized ISO ClaimSearch.

Administrators can create new IDs or reactivate IDs to ensure that users will be able to use the new solution. For more information on administrator functions, contact NJSupport@iso.com. If your company requires training on the new solution, contact info.claimsearch@iso.com.

HOW DO THESE CHANGES AFFECT COMPANIES THAT SUBMIT CLAIMS VIA AN AUTOMATED FTP, MQ, or XML INTERFACE AND USE THE RAW OUTPUT TO PRODUCE A MATCH REPORT?

Although the data will continue to be returned to you for approved analytical purposes, it is our intention that all adjusters and other users with a need to see the claim history on individual claims as part of their everyday workflow will use visualized ISO ClaimSearch instead of homegrown match reports.

There are many benefits to using visualized ISO ClaimSearch, including alerts that highlight potential issues within the claim, quick links to additional data sources, a loss history timeline, historical claim versioning and audit capability, and increased data security. In addition, all new enhancements will be offered only through visualized ISO ClaimSearch, as the existing data feed will not be enhanced going forward.

HOW DO THESE CHANGES AFFECT COMPANIES THAT SUBMIT CLAIMS VIA XML WEB SERVICES AND USE THE XML STYLE SHEETS FOR OUTPUT?

Although the current style sheets still work, they will no longer be supplied or supported and there will not be any updates to the style sheets. All new enhancements will be offered only through visualized ISO ClaimSearch.

WHAT DO I DO IF MY CLAIMS STAFF DOES NOT CURRENTLY HAVE ACCESS TO ISO CLAIMSEARCH?

Administrators can create new IDs or reactivate existing IDs to ensure that users will be able to use the new solution. For more information, contact NJSupport@iso.com.

WHAT ARE THE OPTIONS FOR ACCESSING VISUALIZED ISO CLAIMSEARCH?

1. Your company's users can access visualized ISO ClaimSearch through the ISO ClaimSearch website and use the manual search feature to access match reports.
2. You can create single sign-on (SSO) integration directly to the ISO ClaimSearch website home page and then use the search feature.
3. You can create SSO that links directly to a matching claim in visualized ISO ClaimSearch from your claim system. In addition, you can receive risk alerts that provide a red, yellow, or green ISO ClaimSearch indicator as well as alert details. If your company uses ClaimDirectorSM, you will also receive the claim score and rule information.
4. If your company uses a vendor interface to ISO ClaimSearch, you should encourage the vendor to build full integration directly from your application. With your help, we can work with them directly to build a solution that will meet your needs.

Contact us at ClaimSearchIntegration@verisk.com to learn more and decide which SSO/integration option may work best for you:

WHAT IS SINGLE SIGN-ON (SSO)?

SSO provides:

- **Increased efficiency:** You will be able to access the ISO ClaimSearch website without being prompted to log in each time. Users will no longer have to remember their five-character user ID and password.

- **Improved workflow integration and user satisfaction:** Our system will seamlessly integrate with your system, leading to a more intuitive user experience.
- **Better security and controls:** Employees can access the website only through your company network.
- **Easy access to key information:** Users can view reporting information and analytics posted on the ISO website.

If your company uses a vendor interface to ISO ClaimSearch, you should encourage the vendor to build full integration to visualized ISO ClaimSearch.

WHAT IF I USE A VENDOR CLAIM SYSTEM INTERFACE TO ISO CLAIMSEARCH?

ISO ClaimSearch has already worked with several claim system vendors to build integration to visualized ISO ClaimSearch directly within their claim system:

GUIDEWIRE CLAIM CENTER — If you use version 8.0 or higher, there is an accelerator available for download from the Guidewire Marketplace website:

<https://marketplace.guidewire.com/>

The accelerator will facilitate the display of SSO links and alerts (red, yellow, and green priority) in ClaimCenter, such as the summary screen. It can also create activities for red alerts and flag them as an action item.

MAJESCO — Integration has been built that provides risk response information in the claim system and SSO link.

MARSH CLEARLIGHT — Integration has been built that provides risk response information in the claim system and SSO link.

OTHER CLAIM SYSTEM VENDORS — We recommend that you reach out to your claim system representative to ensure that the vendor is aware of the important dates that have been announced and that they are planning for any required changes. Please have the vendor contact us at ClaimSearchIntegration@verisk.com to learn more about the claim system integration program.

The suggested integration with a claim system would be to retrieve the ISO file number from the ISO ClaimSearch output (FTP, MQ, or XML response) to build a direct link from the claim system to visualized ISO ClaimSearch using single sign-on to seamlessly link to the matching claims in visualized ISO ClaimSearch.

For added benefits, incorporating the risk response will lead to better claim triaging and decision making. Without taking in the risk response, you will not know the status of the claim (red, yellow, green) or know which alerts fired until you view the match report in visualized ISO ClaimSearch. The risk response has the ability to display important information up front to users right within the claim system.

WHAT IF A USER DOES NOT HAVE THE SEARCH BOX AT THE TOP OF HIS OR HER ISO CLAIMSEARCH HOME PAGE?

For access to the “Search My Claims” search box, a user must have access to either Claims Reporting or Claims Inquiry.

WHY DID MY USER RECEIVE A MESSAGE STATING “NO MATCHING CLAIMS REPORTED BY YOUR COMPANY” WHEN USING “SEARCH MY CLAIMS”?

- The claim searched may not have been submitted by your company or company affiliates associated with the user profile.
- The claim was never submitted to ISO ClaimSearch, or a submission was attempted but errors caused the record to be rejected.
- If your company is system-to-system and reports via FTP (overnight batch), the claim will not be available until the following day.
- Claims that were submitted before 2016 and have not been updated since then may not be available within the new view. Users at your company with authority to submit new claims can resubmit or refresh the claim to bring it into the visualized view.

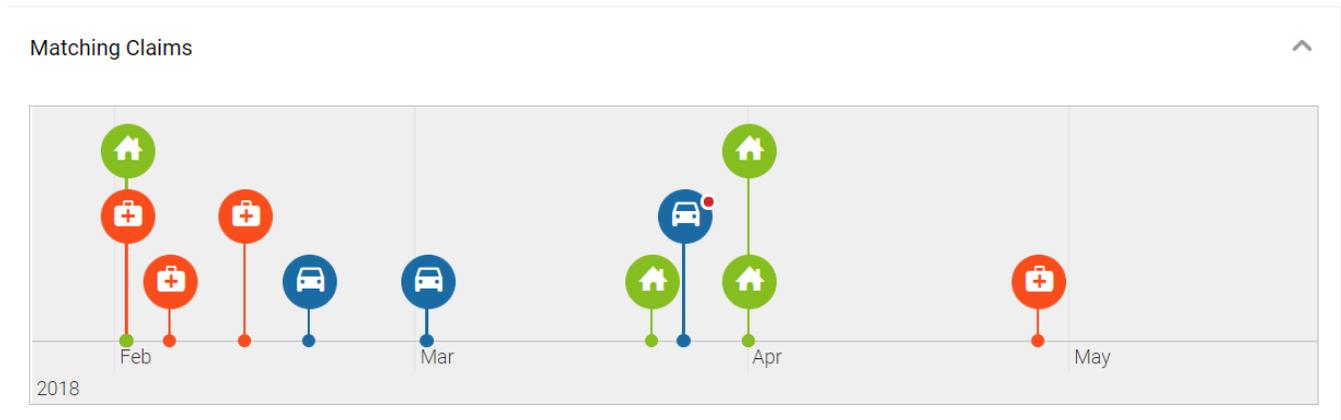
WHY DO USERS GET MORE RESULTS IN CLAIMS INQUIRY THAN IN THE VISUALIZED MATCH REPORT?

Visualized match report searches use an algorithm specifically targeted to closely match the information that users submit. The results provide a basic claim history report for quick claims processing decisions with automatic updates based on modifications to the initial submission. It provides a five-year loss history with minor exceptions.

Claims Inquiry searches the entire database and produces broader search results. These results must be carefully examined to ensure that the information applies to the individual who users intended to search.

ARE THE MATCH RESULTS SUPPOSED TO INCLUDE CLAIMS FROM ALL LINES OF BUSINESS?

Your match report will contain results from the lines of business your company subscribes to. If your company subscribes to all lines, then you may see results for auto, property, and casualty on your report. If your company subscribes only to one line of business, then you will see results only under that line.



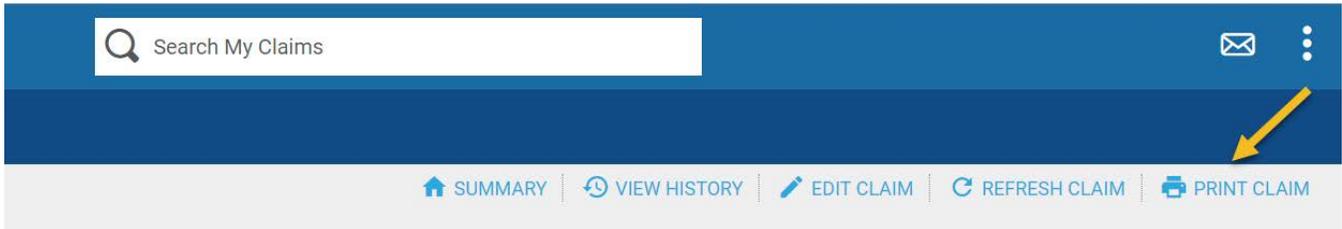
CAN MY USERS STILL PRINT MATCH REPORTS?

Yes, you can still print match reports. The print version will be edited for data security. Instead of printed reports including a list of matching claims and all the details of those claims, you will be able to print only the redacted version that includes a list of matching claims, number of matches, and any alerts. The details of each match can be viewed in visualized ISO ClaimSearch. The print option is available in the upper right of the screen.

However, you may wish to skip printing matching claims because you have access to the historical match reports in ISO ClaimSearch that you can access any time.

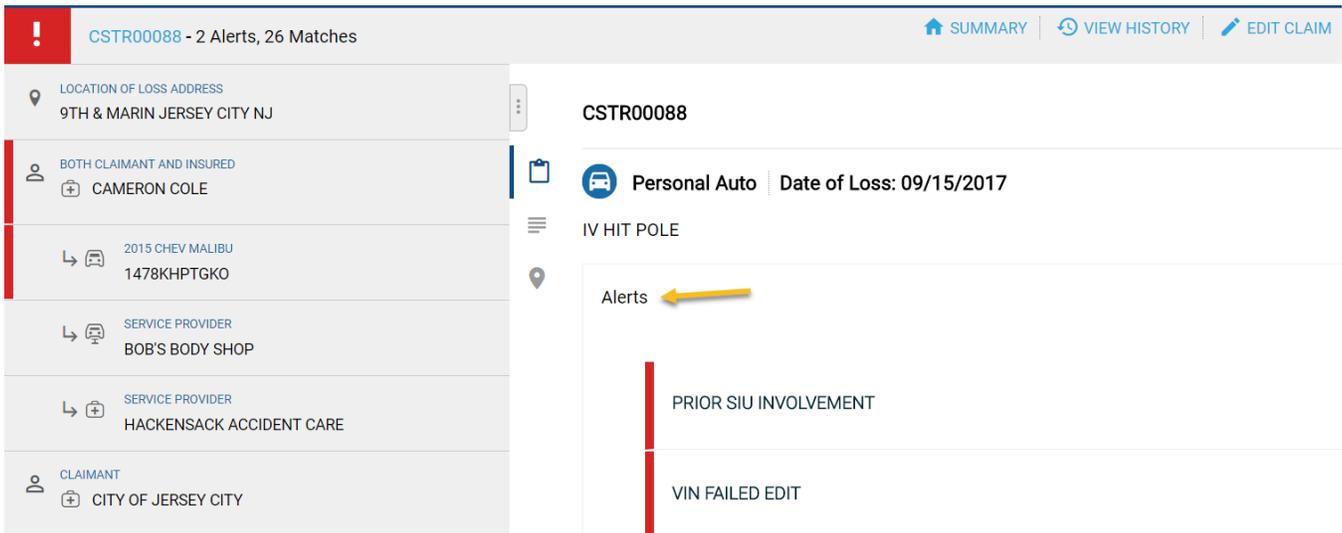
There is an option within the new match report to “View History” in the upper right-hand corner. When toggling to this view, you will be able to access historical versions of your match report. You can quickly identify when the claim was first reported to ISO ClaimSearch (initial), if any new information was reported by your company (replacement), if your company re-researched the claim (refresh), or if another company added a claim or updated a claim that matched your claim (automatic update).

Clicking any of the rows within the history view will bring up the version of the claim for that exact date and time. There is also a toggle to view the “Audit History.” When switching to this view, you will be able to identify who has viewed the claim from your company and when.



WHAT ARE ALERTS AND WHAT DO WE DO WHEN WE SEE THEM?

Alerts indicate that something in the claim may require attention or additional investigation. They include items previously known as “key indicators” plus additional items such as Medicare Reporting Compliance for members that use our CMS Reporting Services and NICB-related notifications for our members that are also members of NICB. Alerts are not related to any type of system error that would need attention.



WHAT DO THE COLORS MEAN?

The red, yellow, and green icons are ISO ClaimSearch claim-level indicators designed to help you prioritize your work.



The green indicator means that there were no prior claim matches and no alerts based on the information available in our database at that time.



The yellow indicator means that at least one matching claim was found in our database, but no alerts were generated (see *WHAT ARE ALERTS?*).



The red indicator is triggered when components within a claim may require immediate attention or additional investigation. This might be the level and type of claims history or items such as prior SIU involvement on one or more matching claims.

If your company uses ClaimDirectorSM, the indicator colors may vary depending on the rules-based customizations in place.

The screenshot shows a claim summary page for 'CSTR'. At the top left, a red alert icon is next to the text 'CSTR has ClaimDirector Score 999', with a yellow arrow pointing to it. The page includes navigation links: SUMMARY, VIEW HISTORY, EDIT CLAIM, PRINT CLAIM, and SIU TRIAGE PAGE. The claim details are as follows:

- LOCATION OF LOSS ADDRESS:** NJ
- BOTH CLAIMANT AND INSURED:** CAMERON COLE (with a red alert icon)
- VEHICLE:** 2015 CHEV MALIBU, VIN 6789KJHYY7UI
- CLAIMANT:** PEOPLES FELIX (with a green indicator)

The claim type is 'Personal Auto' and the 'Date of Loss' is '01/01/2018'. The 'LOSS' section shows an 'Alerts' table:

Alert Score	Alert Description	Rule ID
250	A VIN REPORTED IN THIS LOSS FAILED THE EDIT	Rule 30
200	INCLUDING THIS LOSS, THIS INVOLVED PARTY IS LINKED TO 3 OR MORE SSNS IN THE CLAIMSEARCH DATABASE	Rule 22