

**PARDON THE WAIT.
WE WILL BE STARTING
SOON!**



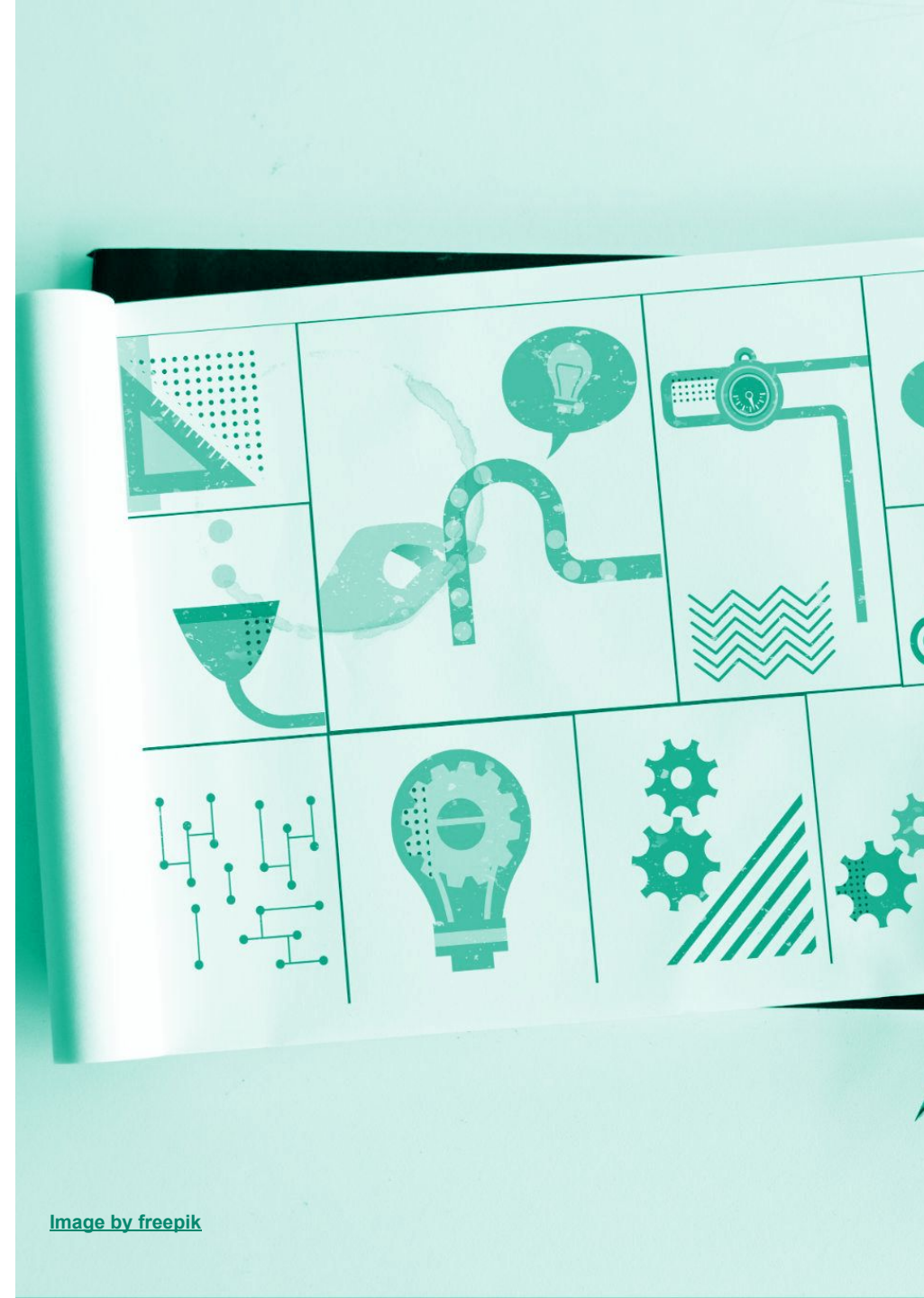
While we wait, use the Zoom chat feature to start the conversation by letting us know where you are joining from!

Note:

- All attendees are on mute for the presentation.
- Feel free to drop your questions or comments in the Q&A.
- This presentation includes Zoom polls and engagement questions - please be ready to participate!
- The presentation portion of today's webinar is about 40 minutes followed by a brief Q&A.
- Recording will be sent out to registrants after the webinar is complete.



Webinar:
**Using Policies, Claims,
and Transactions**



[Image by freepik](#)



Your Hosts for Today's Webinar!



Adam Cole
*Customer Experience
Manager*



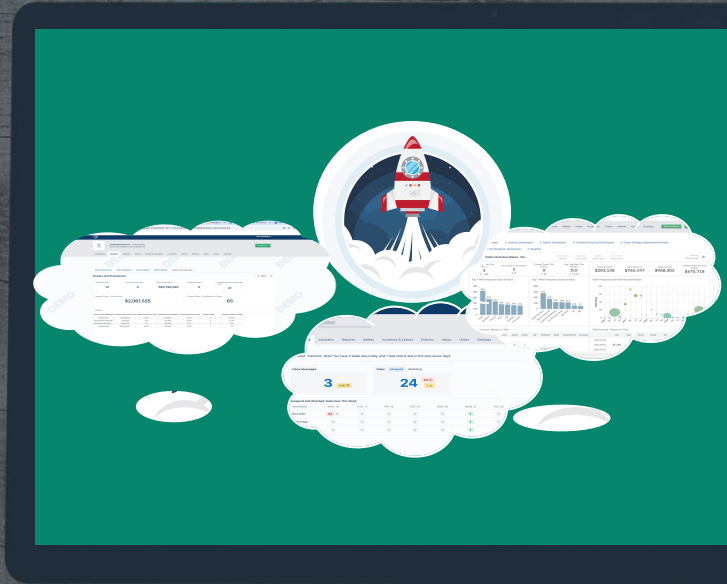
Phillip Ching
Implementation Lead



Tom Wimberly
Chief Product Officer



AGENDA



- **Poll #1:**
- **Policies**
 - How Aclaimant Uses Policies
 - How to Add & Edit Policies (Demo)
 - Best Practices
- **Claims**
 - How Aclaimant Uses Claims
 - How do we Add & Edit Claims (Demo)
 - Best Practices
- **Transactions**
 - How Aclaimant Uses Transactions
 - How do we Add & Edit Transactions (Demo)
 - Best Practices
- **2026 Roadmap Preview**
 - How Aclaimant is Growing Our Claims & Transactions Functionality
- **Poll #2:**
- **Q&A**

POLL

Are you using
Claims and/or
Transactions
in Aclaimant?

#1



Policies

A photograph of two men in a warehouse setting. They are both wearing white hard hats and light-colored shirts. The man on the left is holding a clipboard and looking at the man on the right, who is also holding a clipboard. They appear to be in a discussion. The background shows industrial shelving and stacks of boxes. The entire image has a blue tint.

What is the Policies functionality...

Think of the Policy Module as the brain behind your claim automation. It's an active data source, not just a digital filing cabinet to store policy data.

Benefits of the Policy Module

Drives your Submissions: Policies and policy information is essential for streamlining submissions to carriers and ensuring you get the correct contacts on the receiving end.

Manages your Contacts: Submission contacts are tied to specific policies, ensuring that incident information and claims submissions get to the right stakeholders consistently.

Fuels your Analytics: Use policy information as another way to review and parse your risk data in your Aclaimant Analytics Dashboards.

Powers your Tools: Policies are an integral part of understanding your full risk view and can be used in conjunction with tools and analytics to understand your full depth and breadth of risk.

(a)

Demo and Walk-through of Aclaimant Policies

Policies - Best Practices

Treat Policies as an Active Data Source, Not a Filing Cabinet: To get the most out of Aclaimant, ensure your team views the module as the "brain behind your claim automation," rather than just a place to store static policy documents.

Tie Contacts to Policies Diligently: Because the module manages your contacts, regularly audit your setup to ensure the correct submission contacts are strictly tied to specific policies. This guarantees that incident info and claim submissions always get routed to the right stakeholders.

Keep Data Clean to Fuel Analytics: Make sure policy limits and details are meticulously updated so you can effectively parse and review your risk data in your Aclaimant Analytics Dashboards.



Active Policy Data Flow



Claims

A photograph of two men in a warehouse setting. They are both wearing white hard hats and light-colored shirts. They are standing and looking at a document held by the man on the left. The man on the right is also holding a tablet. In the background, there are stacks of white boxes and a pallet. The lighting is somewhat dim, and the overall tone is blueish.

What is the Claims functionality...

An insurance claim is a formal request to an insurance company for compensation or coverage following a loss or incident, such as an accident, theft, or medical expense. This is the vehicle for financial reimbursement or repairs based on policy terms.

Claims management best practices require prompt reporting (even for uncertain incidents), comprehensive documentation (photos, video, logs), and clear communication with carriers. Key strategies include setting up internal reporting protocols, verifying claim legitimacy to prevent fraud, conducting regular claim reviews with insurers, and using technology for monitoring.

Key Purposes of Submitting an Insurance Claim

Compensation for Losses: The primary goal is to get paid for covered damages (e.g., auto repairs, medical bills).

Leveraging Policy Benefits: It initiates the process of using the coverage detailed in your policy.

Determining Fault and Liability: Prompt reporting allows insurers to investigate, assess liability, and manage claims, particularly when third parties are involved.

Legal Protection: It serves as a formal, documented record of an incident, which is crucial for potential legal disputes or liability claims.

Evidence Documentation: It allows for the submission of necessary evidence, such as photos or police reports, to support your case.

Drives Analytics and Safety: Data from claim records is a rich source of data to determine focus points for Loss Prevention, monitoring the effectiveness of Loss Control and Loss Financing Initiatives.

(a)

***Demo and Walk-through of
Aclaimant Claims Functionality***

Claims - Best Practices

- Prompt Reporting & Documentation:** Report incidents immediately to avoid coverage gaps. Document everything, including photographs, videos of damage, and witness statements.
- Internal Workflows:** Establish internal workflows that ensure timely reporting, accurate data collection and ease of entry.
- Investigate and Validate:** Capture data needed for Accident Investigation and Corrective Actions.
- Effective Communication:** Maintain open, regular communication with insurance carriers, brokers, and internal teams.
- Review and Audit:** Keep claims notes current for accurate reporting and quick access for claims reviews and audits.
- Advanced Technology Tools:** Use predictive modeling to products (i.e. **Aclaimant's Claim Insights**) to spot outlier claims that increase cost or days to close.
- Regular Financial Updates:** Keep financial records up to date to provide a complete loss dollar snapshot of Risk Management program. And provide data source for monitoring and analysis.
- Legal & Compliance:** Ensure compliance with state-mandated response times and regulations.



Transactions

What is the Transactions functionality...

Why Track Transactions:

- **Financial Integrity:** Creates a permanent, auditable Digital "Paper Trail" that matches internal accounting with claim activity details.
- **Deductible Tracking:** Essential for High-Deductible programs to monitor "out-of-pocket" spend against aggregate limits.
- **Regulatory Compliance:** Ensures every dollar moved is tied to a specific claimant, payee, and date for state reporting.

The Value of Tracking Transactions

Real-Time Calculations:

Automatically feeds the **Net Incurred** logic (Total Paid + Reserves - Recoveries) for instant financial exposure snapshots.

Granular Analytics:

Allows users to slice data by **Category** (e.g., Medical vs. Legal) to identify where costs are leaking.

Historical Benchmarking:

Captures the "Evolution of a Claim"—seeing how reserves fluctuate over time rather than just looking at a final number.

Best Use Cases for Transactions

The Self-Insured Model:

When a client handles their own small-dollar payouts without a TPA.

Legal Fee Auditing:

Tracking defense costs to compare law firm efficiency.

Subrogation Wins:

Logging recoveries to show the Risk Department's "ROI" by bringing money back into the company.



***Demo and Walk-through of
Aclaimant Transactions Functionality***

Transactions - Best Practices



Categorize with Intent, Not Just Labels:

Utilize **Subcategories** (e.g., Physical Therapy, Defense Counsel, Subrogation) to ensure you know where your money is going.



The "Self-Pay" Toggle Rule:

Train users to use the **Self-Pay** toggle for every transaction handled in-house. This prevents "Deductible Confusion" when reconciling with carrier reports.



Capture the Payee Early:

Always fill out the **Payee** tab. A transaction without a Payee is just a ghost in the system, and you can't audit what you can't trace.



Keep Your Forecasts Fresh:

Log **Reserve Changes** as soon as new information is received (e.g., a new surgery or a lawsuit filing). A "stale" reserve is a financial liability.



Let the System Do the Math:

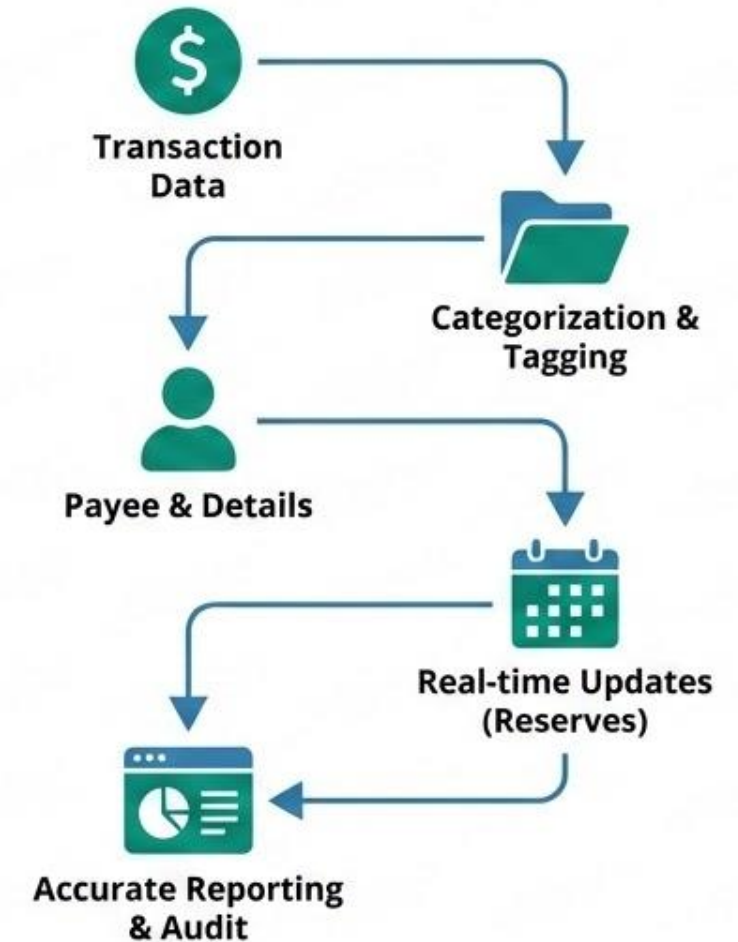
Ensure **Recovery** transactions are never logged as "Negative Payments." They are separate financial events that impact the **Net Incurred** differently.



Document the Decision-Making:

Transactions tell us *how much*, but Notes tell us *why*. Use the **Notes** tab for manual entries to provide an instant audit trail, ensuring total transparency for stakeholders and future reviewers.

Financial Integrity & Audit Trail Flow



ACLAIMANT PRODUCT STRATEGY OVERVIEW



Workplace Injury Triage & Reporting

First Report of Incident

Company Location

Company address

Street

City

State

ZIP code

Location name

Location address

Street

City

State

ZIP code

Claim number

New Incident - Location A ICDC-0027

Company address

1504 Highmark Street

Altoona PA 16802

Location name

Location address

Street

City

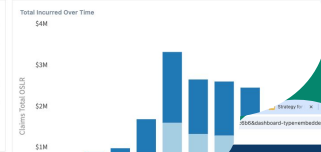
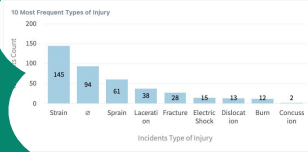
State

ZIP code

Claim number

Dashboard

Total Claims	408
Total Claims	405
Average Lag Days	14
Average Claim Duration	565
Total OSLR	\$7,434,338
Total Payments	\$7,483,626



Assets and Exposures

Total Properties	13
Flood Zone Exposure	4
Total Insured Value	\$85,726,594
Counted Exposure	5
Average Occupancy Rate per Property	41
Property Claims - Total Number of Claims	\$2,061,535
Property Claims - Total Number of Claims	65

Messages

3

Tasks

Assigned: 24

Watching: 23

1

Assigned and Watched Tasks Due This Week

Assignee	WED 16	THU 17	FRI 18	SAT 19	SUN 20	MON 21	TUE 22
Rize Alan	23	0	0	0	0	1	0
Id Cage	0	0	0	0	0	1	0

Overview (New) - De...

New Claims This Month	3
New Claims This Month	2
Claims Closed This Month	0
Avg. Lag Days This Month	0.0
Total Payments	\$203,158
Total Revenues	\$765,147
Total Incurred	\$968,305
Total Incurred of Open Claims	\$675,718

Top 7 Most Frequent Types of Injury

Top 7 Most Frequent Causes of Injury

Claim Frequency and Total Incurred Tracker

Total Incurred - Branch vs. Time

Options

Show Legend: True/False

Legend Position: Bottom

Show Values: Label/Tooltip

Show %: Label/Tooltip

Show Total in Center: True/False

Use Patterns: True/False

Fields

Dimensions: Incidents Date of Incident

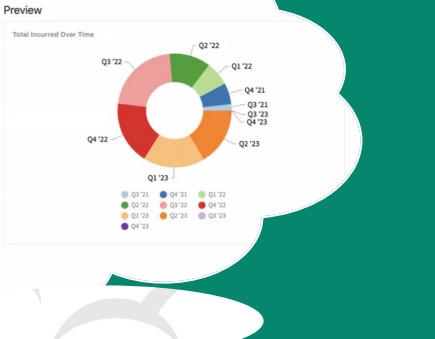
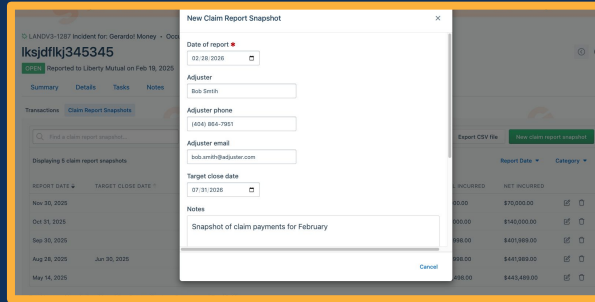


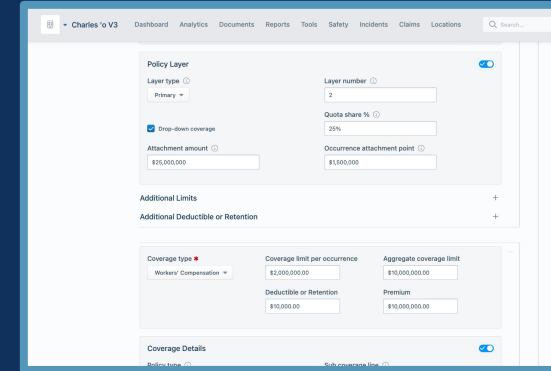
Image by freepik

Claims, Transactions & Policies - The 2026 Product Roadmap Summary

Updates to "Claim Reports"



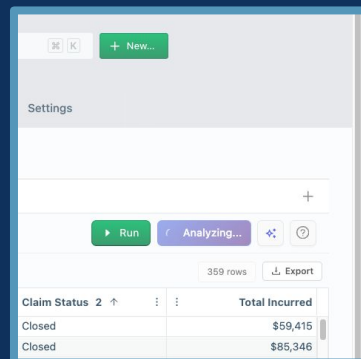
Optional expansion of Policy Fields



Policy Design Tower/ Mud Map report



Data Explorer



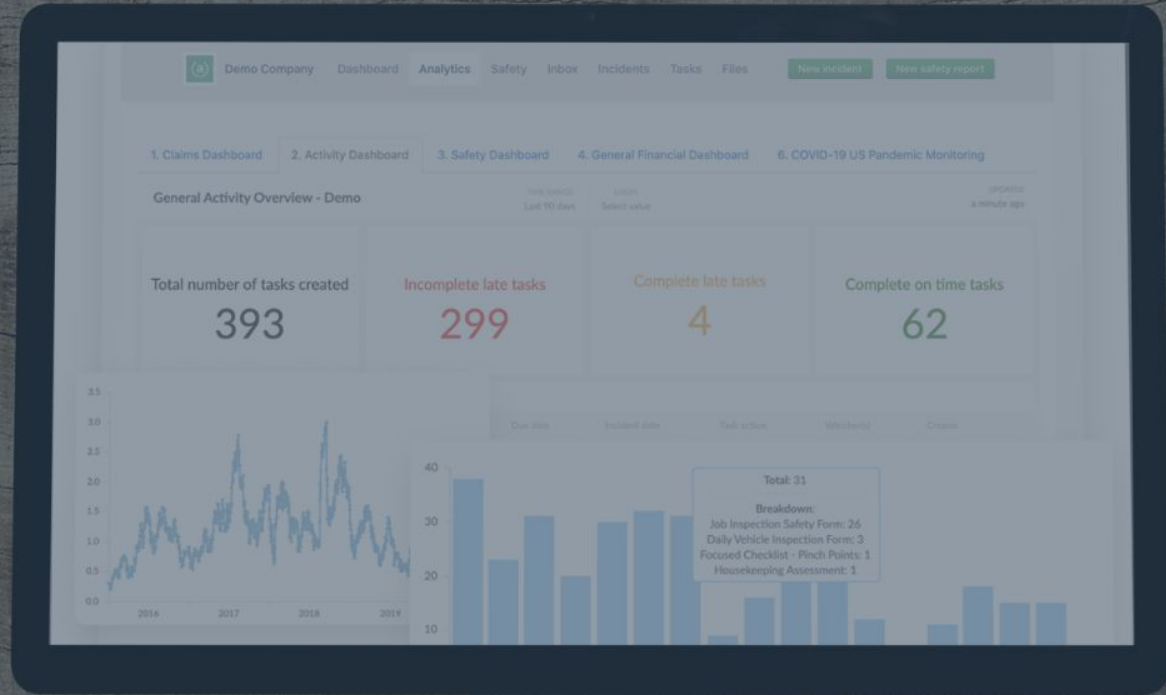
POLL

Which items on the roadmap are you most excited to see and use in Aclaimant?



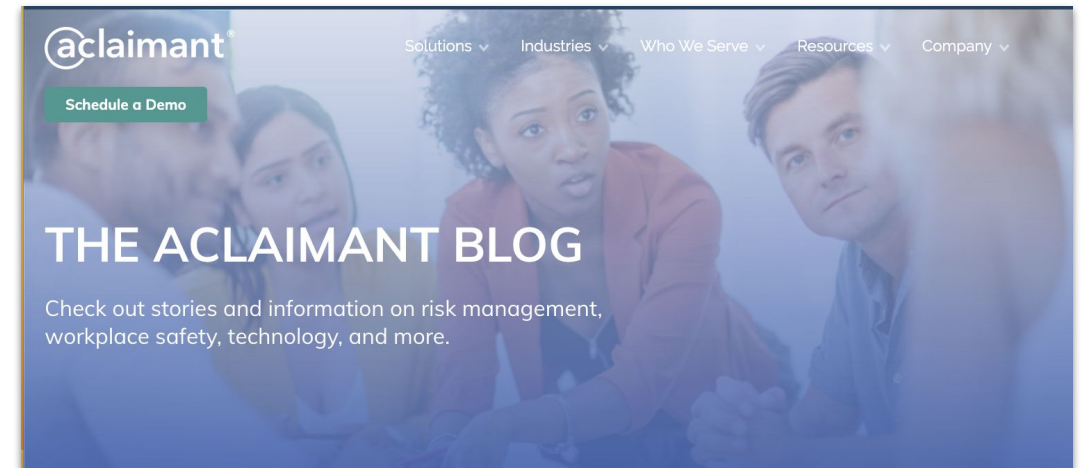
#2

Q & A



Product Releases & Blog

- **Our Help Center now contains product release notes and past Customer Success webinars!**
 - Product Releases
 - Past Customer Success Webinars
 - Newsletters
- **The Aclaimant blog featuring information, past webinars, best practices, and messages from our partners.**
 - <https://www.aclaimant.com/blog>



Success Center, Help Center & Support

- Up to date Help Center and User Guide for the things you can answer.
 - [Creating & Editing Policies](#)
 - [How to View/Edit a Claim](#)
 - All of the Best Practices covered today!
- Direct support for the things you cannot answer.
 - support@aclaimant.com

Contact your CXM for questions unique to your platform and workflow!

The screenshot shows the Aclaimant Success Center website. At the top, there's a header with the Aclaimant logo and the text "Success Center" over a cityscape background. Below the header is a navigation bar with buttons for "Aclaimant Blog", "Contact Support", and "Help Center". Underneath are buttons for "OSHA.gov", "OSHA ITA", "OSHA ITA FAQ", and "Using OSHA ITA".

The main content area is divided into two columns. The left column is titled "Aclaimant News!" and features an article titled "Allocations" with a sub-headline "Ditch the spreadsheets. Master your costs!". The article text says: "We're thrilled to launch the Aclaimant Allocations tool! Say goodbye to manual allocation math and hello to effortless, auditable cost distribution. Now, you can distribute insurance premiums, fees, and safety investments across your entire organization with just a few clicks." Below the text are three bullet points: "Automated Math: Target allocations by state, city, or site instantly.", "Total Transparency: Local managers get clear visibility into their allocations.", and "Audit Ready: Secure, locked records that Finance will love." There is a small rocket icon in a circle. At the bottom of the article, it says: "To request a demo contact Virginia Bloom at virginia.bloom@aclaimant.com or email support@aclaimant.com." Below the article is a five-star rating.

The right column is titled "Meet Your Team" and features a profile for Virginia Bloom, Director of Customer Experience, with a "Contact Me!" button. Below this is a section titled "Frequently Used Help Center Articles" with a "FIRST AID KIT" icon and a list of seven articles: 1. Aclaimant User Guide, 2. How to Create an Incident, 3. How to Create a Safety Report, 4. How to Submit a Claim, 5. All About Analytics - Embedded Analytics, 6. Tasks, Incidents and Safety Icons, 7. OSHA Records Keeping Overview.

At the bottom of the page, there's a "Connect with us on Social Media!" section with an LinkedIn icon. To the right is a "Leave Feedback" section with a question "Are you enjoying Aclaimant?" and a "LEAVE YOUR FEEDBACK" button. The footer contains the copyright information: "© 2025 Aclaimant 330 N. Wabash, 23rd Floor, Chicago, IL (312) 361-3477".

Upcoming Webinar: Tools & Data Explorer

Join Aclaimant's **Tom Wimberly** and **David Wald** for a look into the future of reporting within the Aclaimant platform.

We are pleased to unveil **Data Explorer**, our new custom reporting feature designed to give you visibility and control over your data. We will also be showcasing our advanced financial **Tools (TCOR & Allocations)**, designed to help you track your Total Cost of Risk and distribute costs across your organization.

This session will include best practices, use cases, and a live demo. It is not to be missed.

- **When?** May 20, 2026 at 11am CST
- **How can I sign up?** Check your inbox for registration details!

We hope you can join us!



Tom Wimberly
Chief Product Officer



David Wald
President & Co-Founder

Graveyard



Claims and Transactions - The 2026 Product Roadmap

- Updates to “Claim Reports”
 - Introduction of the word “Snapshot” to claim reports tab
 - The ability to turn off *either* (or neither) Claim Transactions or Claim Snapshot Reports {OPTIONAL}
 - Redesign of screen
 - Moves the new claim snapshot report fields into a pop-up to clean up the screen
 - A new table with an easier-to-use layout
- “Policy Complex” {OPTIONAL}
 - The introduction of a new set of policy fields for those interested in storing detail on policies
 - Broker detail tracking
 - Layers
 - Terms
 - Additional Limits
 - Additional Deductibles/Retention
 - Policy Design Tower/Mud Map report
- Data Explorer



(a)

*Demo and Walk-through of
Aclaimant Policies*



(a)

***Demo and Walk-through of
Aclaimant Claims Functionality***



***Demo and Walk-through of
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