

Claims intake and processing

Automates the entire claims intake and processing workflow from initial claim submission through final settlement, reducing manual processing time by 70% and improving customer satisfaction through real-time updates.

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Get Your Blueprint

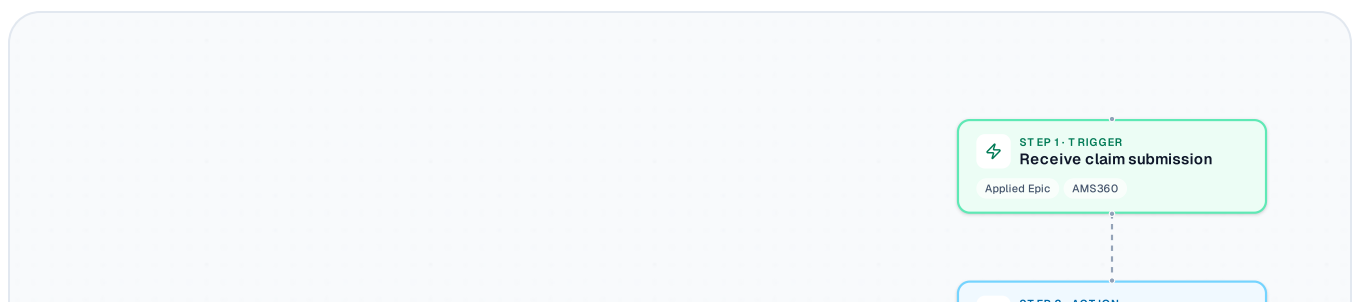


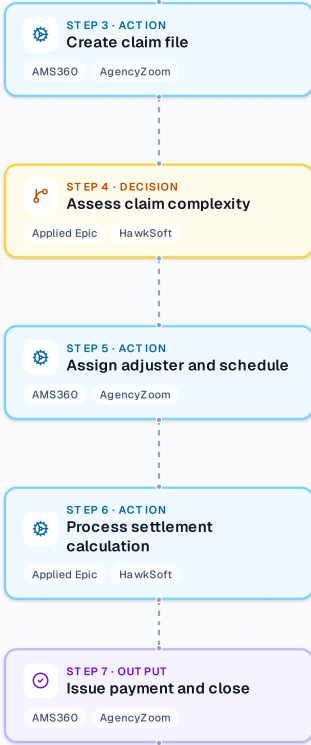
WORKFLOW TRIGGER

Customer submits a new insurance claim via online portal, mobile app, or phone call

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive claim submission

Customer submits claim details including incident description, photos, and policy information through digital channels. System automatically captures and validates initial claim data.

2

 ACTION

Validate policy coverage

System verifies active policy status, coverage limits, deductibles, and claim eligibility against policy terms. Cross-references with policy management system for accuracy.

Applied Epic

HawkSoft

3

 ACTION

Create claim file

Generates unique claim number, establishes claim folder with all documentation, and assigns initial reserve amount based on claim type and coverage. Sends confirmation to customer.

AMS360

AgencyZoom

4

 DECISION

Assess claim complexity

AI evaluates claim severity, damage amount estimates, and fraud indicators to determine if claim requires special investigation or can proceed with standard processing workflow.

Applied Epic

HawkSoft

5

 ACTION

Assign adjuster and schedule

Routes claim to appropriate adjuster based on complexity assessment, location, and workload. Automatically schedules inspection appointment and notifies all parties.

AMS360

AgencyZoom

6

 ACTION

Process settlement calculation

System calculates settlement amount based on adjuster findings, policy terms, and deductibles. Generates settlement documentation and payment authorization.

Applied Epic

HawkSoft

7

 OUTPUT

Issue payment and close

Processes settlement payment to customer, updates claim status to closed, and triggers satisfaction survey. Archives all claim documentation in system.

AMS360

AgencyZoom



Outputs

- Processed claim with settlement amount

- Updated customer policy record

AI Business OS

- Claim closure notification and satisfaction survey



Key Metrics

- Average claim processing time
- First call resolution rate
- Customer satisfaction score



Tools & Integrations

- Applied Epic
- AMS360
- HawkSoft
- AgencyZoom

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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