

Quick Reference Guide

There are 5 steps to complete this task:

1. Open the Claims module.
2. Press New.
3. In the New File window, press Auto.
4. In the New Claims Entry window, fill out all mandatory fields.
5. Press Save.

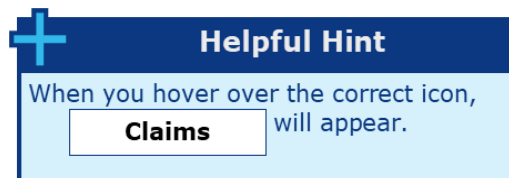
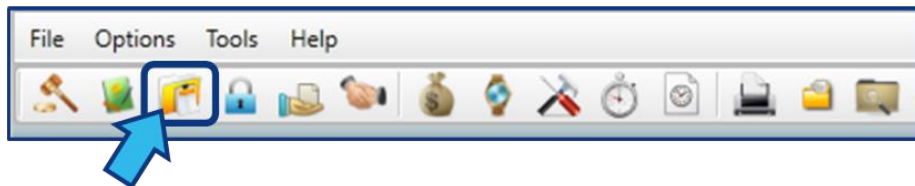
Standard Guide

Step 1. Open the Claims module.

There are 2 ways to open this module.

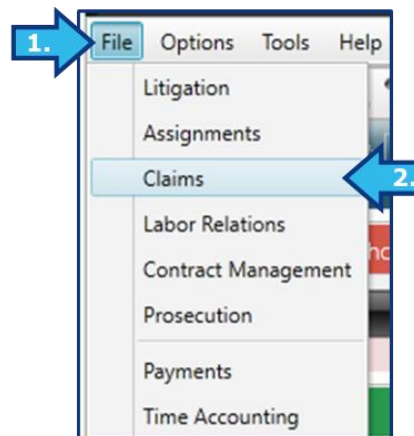
1-Step Option:

Press the **Claims** icon on the **Global Toolbar**.



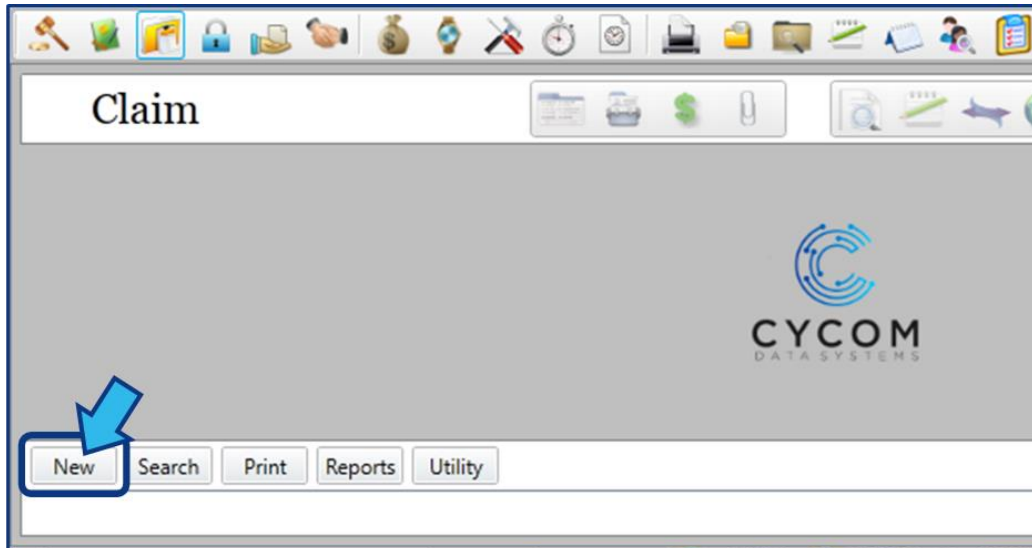
2-Step Option:

1. On the **Menu Bar**, press **File**.
2. Press **Claims**.



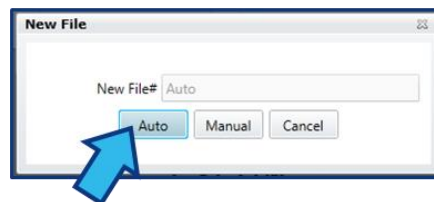
Step 2. Press New.

The **New** button is located in the bottom-left corner of the screen.



Step 3. Press Auto in the New File window.

A **New File** window appears on completing **Step 2**. Press the **Auto** button to automatically generate a **File Number** for the new matter in accordance with the naming convention of your office.

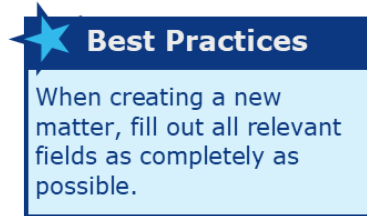


Step 4. Fill out the mandatory fields in the New Claims Entry window.

A **New Claims Entry** window appears on completing **Step 3**. Fill out the mandatory fields for the matter.

Looking for field descriptions?

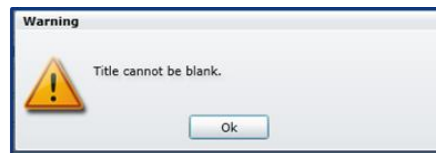
Check out the [New Claims Entry Field Description Guide](#).



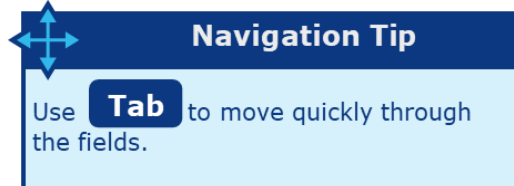
Best Practices

When creating a new matter, fill out all relevant fields as completely as possible.

Mandatory fields are marked with an asterisk (*). The new claim cannot be saved until values for these fields are provided. A **Warning** window will appear if you try to save a new claim without values in these fields.

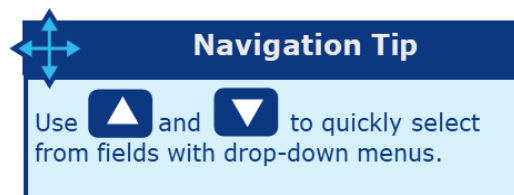


You can navigate from field to field using **Tab** or **Shift + Tab** and can cycle through drop-down lists with the up and down arrow keys.





Navigation Tip

Use **Tab** to move quickly through the fields.

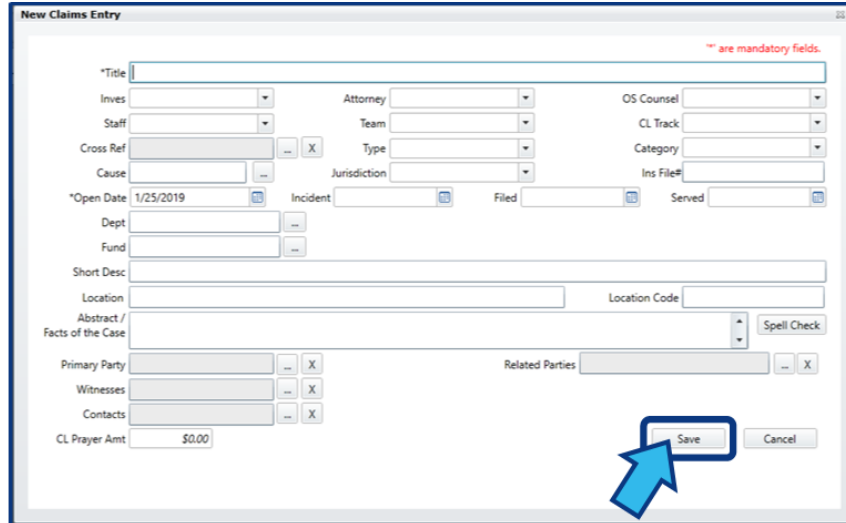


Navigation Tip

Use  and  to quickly select from fields with drop-down menus.

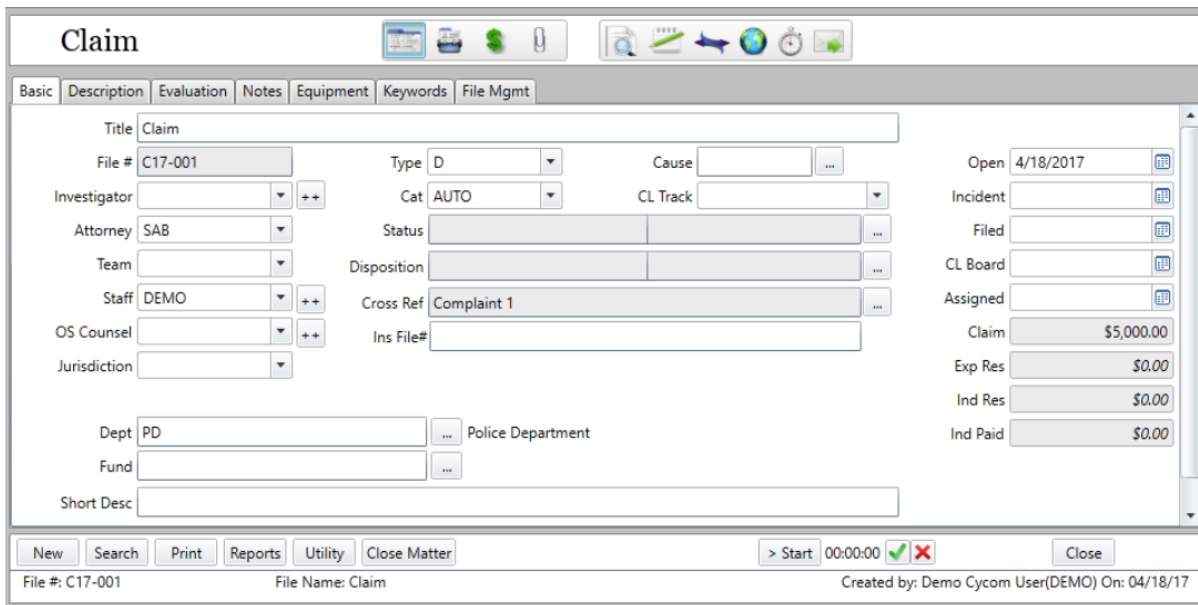
Step 5. Press Save.

The **Save** button is located in the bottom-right corner of the **New Claims Entry** window.



The screenshot shows the 'New Claims Entry' window with various input fields. A blue arrow points to the 'Save' button in the bottom right corner. The 'Save' button is highlighted with a blue border. The 'Cancel' button is located to its right. The window title is 'New Claims Entry' and there is a red asterisk indicating mandatory fields.

After saving, the **Basic** tab of your new **Claims** matter will appear.



The screenshot shows the 'Claim' window with the 'Basic' tab selected. The window title is 'Claim'. The 'Basic' tab contains the following information:

Title	Claim		
File #	C17-001	Type	D
Investigator		Cat	AUTO
Attorney	SAB	Status	
Team		Disposition	
Staff	DEMO	Cross Ref	Complaint 1
OS Counsel		Ins File#	
Jurisdiction			
Dept	PD	Police Department	
Fund			
Short Desc			

On the right side of the window, there are several fields:

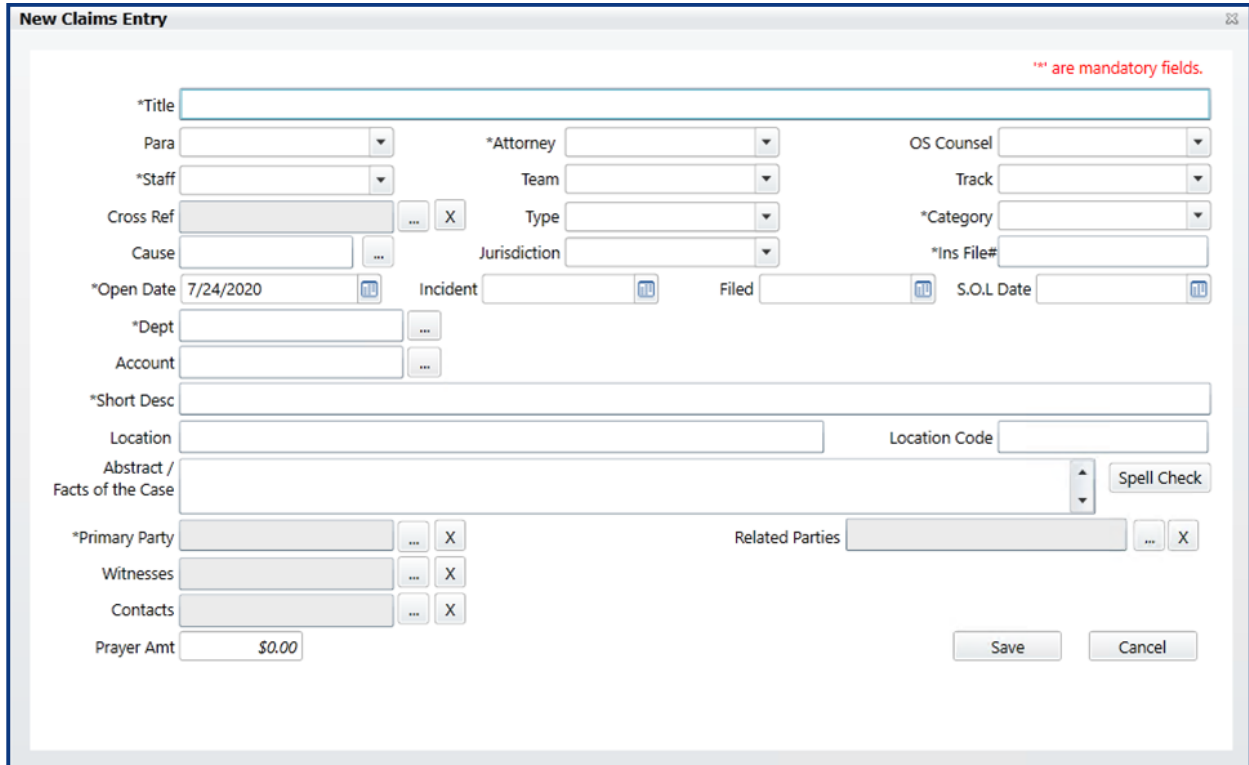
Open	4/18/2017
Incident	
Filed	
CL Board	
Assigned	
Claim	\$5,000.00
Exp Res	\$0.00
Ind Res	\$0.00
Ind Paid	\$0.00

At the bottom of the window, there are buttons for 'New', 'Search', 'Print', 'Reports', 'Utility', 'Close Matter', '> Start', '00:00:00', 'Close', and 'File #: C17-001', 'File Name: Claim', 'Created by: Demo Cycom User(DEMO) On: 04/18/17'.

New Claims Entry Field Description Guide

- **Title**
- **Paralegal (Para)**
- **Attorney**
- **Outside Counsel (OS Counsel)**
- **Staff**
- **Team**
- **Track**
- **Cross Reference (Cross Ref)**
- **Type**
- **Category**
- **Cause**
- **Jurisdiction**
- **Insurance File Number (Ins File #)**
- **Open Date**
- **Incident**
- **Filed**
- **Served (S.O.L.)**
- **Department (Dept)**
- **Account**
- **Short Description (Short Desc)**
- **Location**
- **Location Code**
- **Abstract / Facts of the Case**
- **Primary Party**
- **Related Parties**
- **Witnesses**
- **Contacts**
- **Prayer Amount (Prayer Amt)**

The configuration of the **CLW** installation in your office determines which fields are mandatory or disabled, and which fields are visible. If you discover an issue with the field configuration in the **New Claims Entry** window, please contact your **System Administrator**.



The screenshot shows the 'New Claims Entry' window with the following fields and controls:

- *Title**: Text input field (mandatory).
- Para**: Dropdown menu.
- *Attorney**: Dropdown menu (mandatory).
- OS Counsel**: Dropdown menu.
- *Staff**: Dropdown menu (mandatory).
- Team**: Dropdown menu.
- Track**: Dropdown menu.
- Cross Ref**: Text input with a search icon and an 'X' button.
- Type**: Dropdown menu.
- *Category**: Dropdown menu (mandatory).
- Cause**: Text input with a search icon.
- Jurisdiction**: Dropdown menu.
- *Ins File#**: Text input (mandatory).
- *Open Date**: Date input (7/24/2020) with a calendar icon.
- Incident**: Text input with a calendar icon.
- Filed**: Text input with a calendar icon.
- S.O.L Date**: Date input with a calendar icon.
- *Dept**: Text input with a search icon (mandatory).
- Account**: Text input with a search icon.
- *Short Desc**: Text input (mandatory).
- Location**: Text input.
- Location Code**: Text input.
- Abstract / Facts of the Case**: Text area with a scroll bar and a 'Spell Check' button.
- *Primary Party**: Text input with a search icon and an 'X' button (mandatory).
- Related Parties**: Text input with a search icon and an 'X' button.
- Witnesses**: Text input with a search icon and an 'X' button.
- Contacts**: Text input with a search icon and an 'X' button.
- Prayer Amt**: Text input (\$0.00).
- Buttons**: 'Save' and 'Cancel' buttons.

Title

The name of the new matter.

This is always a mandatory field.

Paralegal (Para)

The paralegal assigned to the matter.

Attorney

The attorney to whom the matter was given. If you are an attorney, this field will auto-populate with your username.

Outside Counsel (OSC)

Outside Counsel used on the matter.

Staff

The staff on the matter, or the staff responsible for managing the entry of this matter.

Team

The team to which the matter is assigned.

Track

A tracking code to identify the matter handling process.

Cross Reference (Cross Ref)

It is possible to cross-reference another matter when creating a new case. See [Cross-referencing a matter](#) to learn more.

Type

Each Category code has a subset of Type codes. Some examples of type codes are Procurement, Licensing, Civil Rights, Personnel, and Zoning.

Category

Category codes separate matters into classifications relevant to your office. Some examples of categories are Contracts, Ordinances, Opinions, and Resolutions.

Cause

The cause code for the matter.

Jurisdiction

The jurisdiction for which this matter is assigned.

Insurance File Number (Ins File #)

The insurance file number for this matter.

Open Date

The date the matter was opened.

Incident

The date of the incident.

Filed

The date the matter was filed.

Served (S.O.L.)

The date the matter was served.

Department (Dept)

The Department field represents the entity to whom the services of the matter are being rendered.

Account

The account to which expenses for this matter are applied.

Short Description (Short Desc)

A short description of the matter.

Location

This field may be used to note the location of the incident or the location of matter files. Check with your **System Administrator** or **Office Manager** to confirm how your site uses this field.

Location Code

The location code for this matter.

Abstract / Facts of the Case

An unlimited text field to enter the matter abstract and/or any additional description of the matter.

Primary Party

The primary party, or parties, on this matter. Primary parties typically include the Claimant and Respondent.

Related Parties

Parties related to a primary party. Related parties typically include attorneys or others responsible for representing the interests of, or acting as agents for, a primary party.

Witnesses

Individuals who may have witnessed the incident or may provide relevant information.

Contacts

Additional individuals relevant to the matter that are neither assigned staff, primary parties, related parties, or witnesses.

Prayer Amount (Prayer Amt)

The amount the Claimant is seeking to resolve the matter.