

Fundamental Underwriters RMIS User Manual

Fundamental Underwriters' Risk Management Information System

Fundamental Underwriters' risk management information system (RMIS) provides powerful and immediate information that is simple to use and aligns customers, brokers and FUW staff with a strategic platform to actively reduce loss costs. This manual walks you through the login process, how to navigate the RMIS dashboard, and how to develop both standard and custom claim alerts and reporting.



What can Fundamental RMIS do for you?

RMIS provides:

- **A Customizable Dashboard:** With more than 30 customizable panels, you can monitor your performance in key areas quickly and effectively through the use of powerful, graphical data.
- **Fast Search Functions:** You want answers quickly, so we provide access to information you need in language you can understand.
- **Comprehensive Claims Data:** Click on any field to drill down to claim-level data or search for common features. Plus, the system enables easy identification of loss cause patterns.
- **Details You Need:** Find claim development, adjuster notes and more for your FUW claims.
- **Clear Comparisons:** Compare classifications or losses easily by location and region.
- **Robust Reports:** Comprehensive data is included with more than 50 standard report templates. Custom reports, automatic delivery and data charting are also available.



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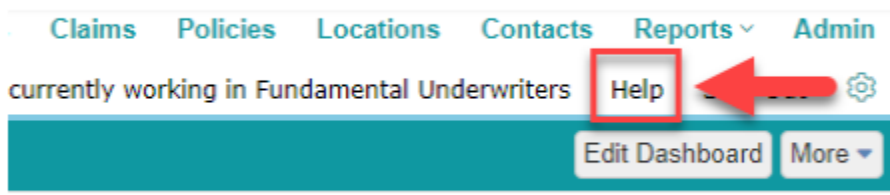
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Logging into RMIS

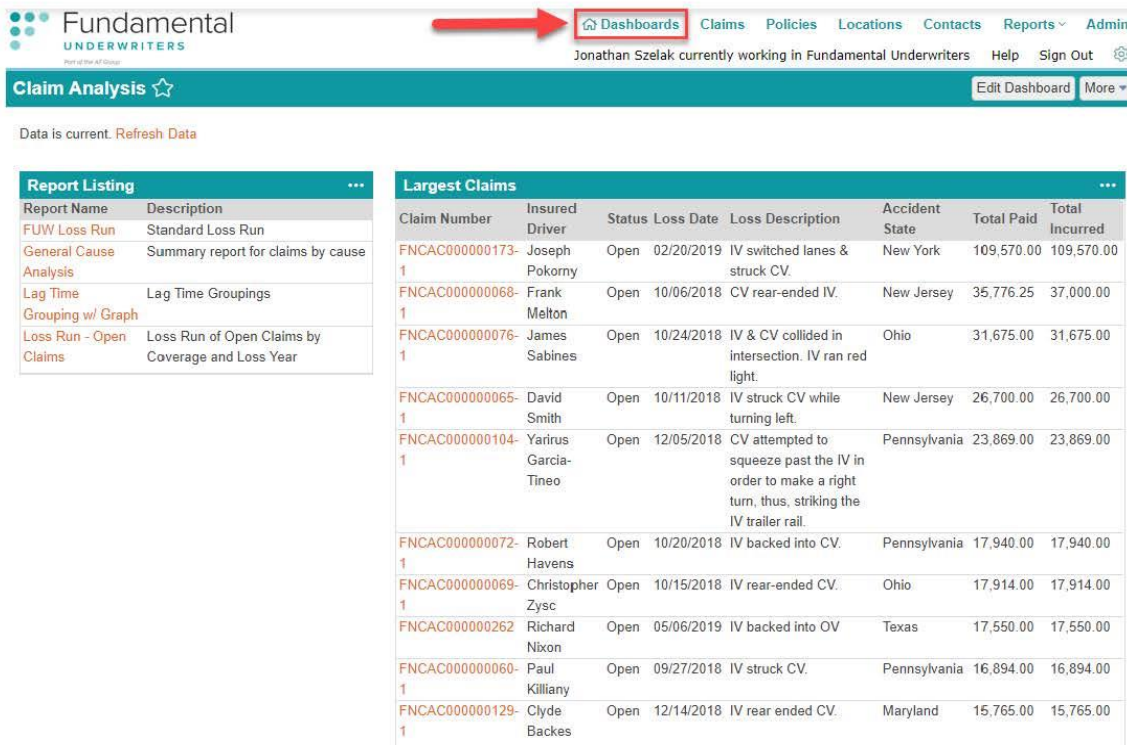
1. Use the link provided by your Fundamental contact to access the login page.
2. Enter your security credentials:
You have received these credentials at the start of your policy period. If you need assistance obtaining additional credentials, please contact Fundamental Underwriters Origami Support at support@fundamentaluw.com or 866-221-0095.

If you need help anywhere in RMIS, click the "help" button on the far-right side of the screen. This button will take you to a list of short videos about whatever topic you're working on. Need additional help? Contact support@fundamentaluw.com and we can walk you through your questions.



Dashboards

The first thing you will see when you enter RMIS is your dashboard. Fundamental provides a standard claims analysis dashboard right out of the box, but custom dashboards can be created as well. Note: you can always return to this page by clicking **Dashboards** on the top of the screen.



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[Dashboards](#) [Claims](#) [Policies](#) [Locations](#) [Contacts](#) [Reports](#) [Admin](#)

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Claim Analysis ☆ [Edit Dashboard](#) [More](#)


Data is current. [Refresh Data](#)

| Report Name | Description |
|--|---|
| FUW Loss Run | Standard Loss Run |
| General Cause Analysis | Summary report for claims by cause |
| Lag Time Grouping w/ Graph | Lag Time Groupings |
| Loss Run - Open Claims | Loss Run of Open Claims by Coverage and Loss Year |

| Claim Number | Insured Driver | Status | Loss Date | Loss Description | Accident State | Total Paid | Total Incurred |
|----------------------------------|----------------------|--------|------------|--|----------------|------------|----------------|
| FNCAC000000173-1 | Joseph Pokorny | Open | 02/20/2019 | IV switched lanes & struck CV. | New York | 109,570.00 | 109,570.00 |
| FNCAC000000068-1 | Frank Melton | Open | 10/06/2018 | CV rear-ended IV. | New Jersey | 35,776.25 | 37,000.00 |
| FNCAC000000076-1 | James Sabines | Open | 10/24/2018 | IV & CV collided in intersection. IV ran red light. | Ohio | 31,675.00 | 31,675.00 |
| FNCAC000000065-1 | David Smith | Open | 10/11/2018 | IV struck CV while turning left. | New Jersey | 26,700.00 | 26,700.00 |
| FNCAC000000104-1 | Yairius Garcia-Tineo | Open | 12/05/2018 | CV attempted to squeeze past the IV in order to make a right turn, thus, striking the IV trailer rail. | Pennsylvania | 23,869.00 | 23,869.00 |
| FNCAC000000072-1 | Robert Havens | Open | 10/20/2018 | IV backed into CV. | Pennsylvania | 17,940.00 | 17,940.00 |
| FNCAC000000069-1 | Christopher Zysc | Open | 10/15/2018 | IV rear-ended CV. | Ohio | 17,914.00 | 17,914.00 |
| FNCAC0000000262 | Richard Nixon | Open | 05/06/2019 | IV backed into OV | Texas | 17,550.00 | 17,550.00 |
| FNCAC000000060-1 | Paul Killiany | Open | 09/27/2018 | IV struck CV. | Pennsylvania | 16,894.00 | 16,894.00 |
| FNCAC000000129-1 | Clyde Backes | Open | 12/14/2018 | IV rear ended CV. | Maryland | 15,765.00 | 15,765.00 |



Pictured below, you will see the dashboard with quick links to the common reports.



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Fundamental Dashboard ☆

Edit Dashboard More

Data as of 2 minutes ago. [Refresh Data](#)

Report Listing

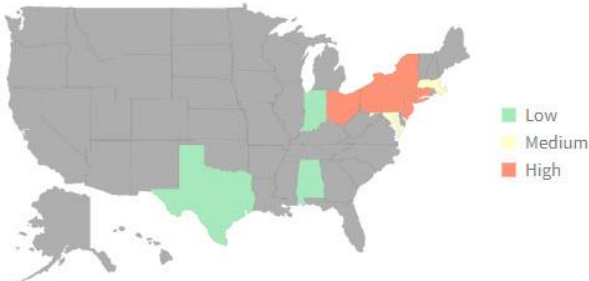
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Largest Claims

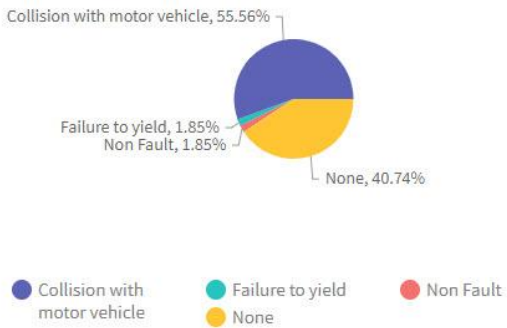
| Claim Number | Insured Driver | Status | Loss Date | Loss Description | Accident State | Total Paid | Total Incurred |
|----------------------------------|----------------------|--------|------------|--|----------------|------------|----------------|
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| FNCAC000000076-1 | James Sabines | Open | 10/24/2018 | IV & CV collided in intersection. IV ran red light. | Ohio | 31,675.00 | 31,675.00 |
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| FNCAC000000060-1 | Paul Killiany | Open | 09/27/2018 | IV struck CV. | Pennsylvania | 16,894.00 | 16,894.00 |
| FNCAC000000129-1 | Clyde Backes | Open | 12/14/2018 | IV rear ended CV. | Maryland | 15,765.00 | 15,765.00 |

Loss Analysis

State Frequency Map



Top Causes

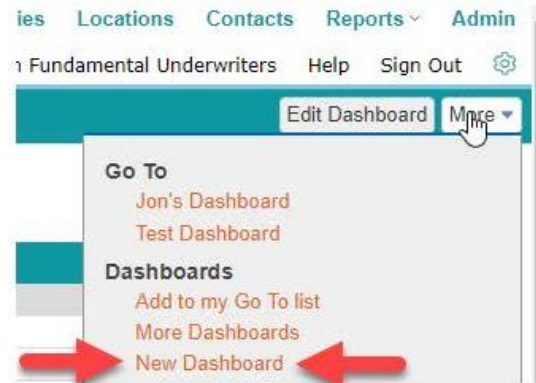


| Cause | Percentage |
|------------------------------|------------|
| Collision with motor vehicle | 55.56% |
| None | 40.74% |
| Failure to yield | 1.85% |
| Non Fault | 1.85% |

AF Group (Lansing, Mich.) and its subsidiaries are a premier provider of innovative insurance solutions. Insurance policies may be issued by any of the following companies within AF Group:
 Accident Fund Insurance Company of America, Accident Fund National Insurance Company, Accident Fund General Insurance Company, United Wisconsin Insurance Company,
 Third Coast Insurance Company or CompWest Insurance Company.

Creating a New Dashboard

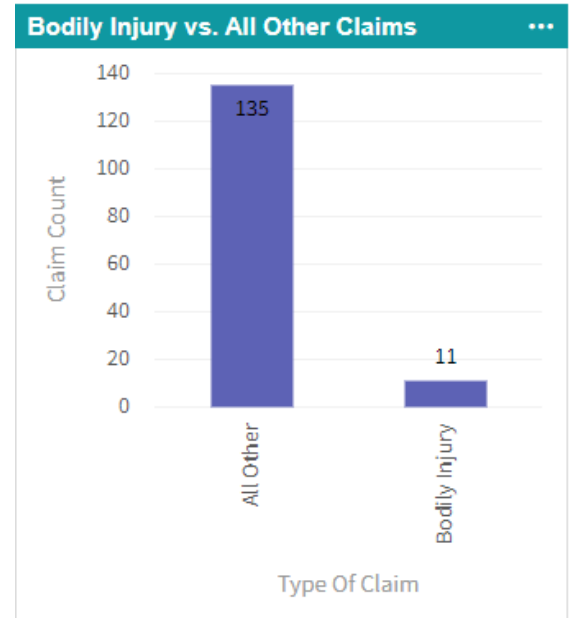
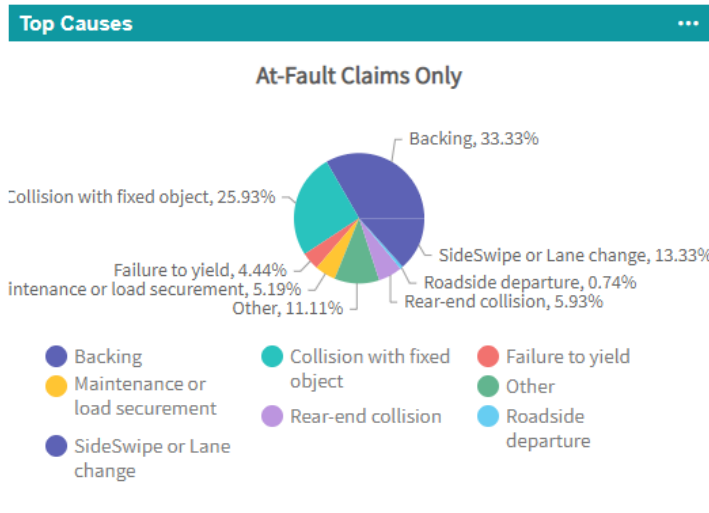
1. In order to create a new dashboard, click **More**, then **New Dashboard**.
2. Choose a name for the dashboard and, optionally, provide a description and pick a color theme.
3. In order to name the dashboard headers, click on the text that says **Click to Add Header**.
4. To change the panel's column layout, click the different dashboard layouts for the specific panel located on the right.
5. To add charts, click the **Add Widget** button and select the kind of widget you want. More information on this is below.
6. **Add Panel** will add another panel of widgets, allowing you to name a new section, or for spacing.



 A screenshot of the 'Jonathan's Dashboard - Edit Mode' interface. The top navigation bar includes 'Dashboards', 'Claims', 'Policies', 'Locations', 'Contacts', 'Reports', and 'Admin'. Below the navigation bar, there are input fields for 'Name', 'Description', 'Theme', and 'Private'. The 'Interactive Options' section has two checkboxes: 'Allow users to view dashboard as another user' and 'Use Interactive Options or Global Filter'. The main area shows a panel header 'Click to Add Header' with a red arrow pointing to it. To the right of the header is a red box containing several dashboard layout icons. At the bottom, there are three 'Add Widget' buttons and one 'Add Panel' button.


Widgets

Widgets are the customizable individual graphs and charts on your dashboard -- you can think of them as mini reports. You can filter and group widgets like you can with reports.



Creating Widgets

The first step in creating a widget is to select from the available widget types.

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Available Widgets New Widget

| Name | Description | Filter Areas |
|----------------------------------|--|---|
| Accidents by Driver | Accidents by Driver | Claim, Location, Coverage, Policy |
| Accidents by Driver Chart | Accidents by Driver Chart | Claim, Location, Coverage, Policy |
| Annual Stratification Chart | A stacked bar chart showing frequency or severity annually, broken down by one field | Claim, Location, Coverage |
| Audit Score by Location | Audit Scores by Location for a specified date range | AuditResponse, AuditDefinition, Location |
| Audit Score by Territory | Audit Scores by Territory for a specified date range | AuditResponse, AuditDefinition, Location, Territory |
| Benchmarking | Chart showing benchmark vs. actual | Claim, Location, Coverage |
| Benefits With Expiring Schedules | List of Benefits with schedules expiring | Benefit, Claim |
| Canadian Province Frequency Map | Canada map of frequency by province | Claim, Location, Coverage |
| Certificate Tracking | A listing of insureds to highlight those with deficiencies, about to expire, etc. | Insured |
| Checks by Day/Week/Month | Count of checks changed to a certain status by day/week/month | Check, Client |

Filter By

Name:

Category:

Type:

Description:

Recently Viewed

No records viewed recently.



Some of the more popular widgets include:

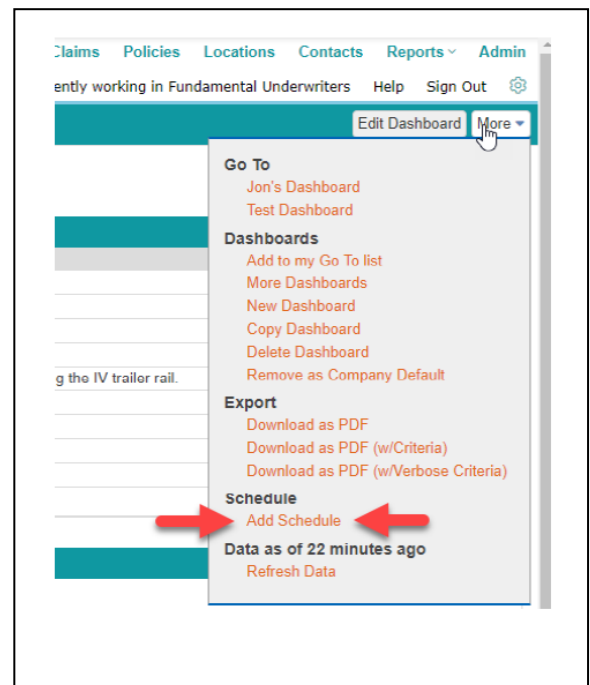
- Claims with large report lag
- Claims by day of the week
- Frequency and severity
- Terminal location trends
- Driven by claim count


For each type of widget, follow the instructions presented and click on **Save Changes**. See the “Creating a Custom Report” section on page 20 if you want to know more about filtering and grouping. If you can’t find what you are looking for, you can always create your own custom widget.

For help creating a more advanced dashboard, please email support@fundamentaluw.com or call 866-221-0095.

Scheduling / Emailing a Dashboard

1. On the dashboard page, click the **More** Button on the top right-hand side of the screen. Select **Add Schedule**.
2. Input the frequency at which you wish to receive the report. Schedule the dashboard to start and end at the desired time.
3. To have the report sent to yourself, select **Me** in the “Send To” box.
4. To send the report to a person, or group of people, select **Email List** box, and enter the addresses you want to receive the report, separated by a comma.
5. In the “Reply to Address” box input your email information and customize the email by subject and body however you would like.
6. Hit **Save Schedule** on the top right-hand corner of the page.



Schedule Dashboard Claim Analysis Create new schedule**Schedule**Frequency: Monthly

Run on the selected month(s) each year:

☒ January ☒ February ☒ March ☒ April ☒ May ☒ June ☒ July ☒ August ☒ September ☒ October ☒ November ☒ December

All None

Run on this date each month:

☒ 1

or

Run on the:

☐ First Sunday of each month

Schedule Starts: *

07/10/2020



Time: 12:00 AM

(UTC-05:00) Eastern Time (US & Canada)

Schedule Ends:

07/10/2021

**Dashboard Criteria Page**

Show Criteria:

None**Send To**

Send To:

Me**Email**

Reply To Address: *

Jonathan.szelski@fundamentaluw.com☐ Request Read Receipt

Subject: *

Origami Risk Scheduled Dashboard

Body: *

Attached is your scheduled Origami Risk dashboard, Claim Analysis

Client Information Pages

Policies Page

The policies page will display basic information about your policies. You can filter what policies you want to see by their policy number, effective date, insured name, coverage, layer, carrier and status.

To see information about a specific policy, simply click on the policy number.

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Dashboards Claims Policies Locations Contacts Reports Admin
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Policies New Policy More

Policy Effective Date is not equal to 06/02/2020 and Policy Effective Date is not equal to 01/01/2019 Edit Criteria Edit

Columns Save Add to Dashboard

| Policy Number | Policy Effective Date | Insured | Agency | Underwriter | Total Premium |
|---------------|-----------------------|--------------------------|--------|-------------|---------------|
| FNCAP0000001 | 04/01/2018 | Fundamental Underwriters | | | |
| FNCAP0000002 | 04/01/2019 | Fundamental Underwriters | | | |

Policy Views All Views

All Policies
Fundamental Testing

Filter By Advanced Search

Number
Effective
On
Insured
Coverage All
Layer All
Carrier All
Status All

Search Clear

Claims Page

The claims page lists every single one of your claims. To sort the list, click on a header title like **Loss Date** or **Total Incurred**.

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Claims New Claim More

All Claims Edit Criteria Edit Columns Save Add to Dashboard

| Claim Number | Loss Date | Driver | Status | Location | Report Lag | Total Paid | Total Incurred |
|------------------|------------|------------------------|--------|-------------------|------------|------------|----------------|
| FNCAC000000104-1 | 12/05/2018 | Yarirus Garcia-Tineo | Open | 1 - 123 MAIN ST | 1 days | 23,869.00 | 23,869.00 |
| FNCAC000000112-1 | 12/08/2018 | William Speller | Open | 1 - 123 MAIN ST | 4 days | 0.00 | 0.00 |
| FNCAC000000088-1 | 11/14/2018 | Wayne Barber | Open | 1 - 123 MAIN ST | 1 days | 0.00 | 0.00 |
| FNCAC000000009-1 | 05/23/2018 | Trent Sherwood | Open | 1 - 123 MAIN ST | 2 days | 0.00 | 0.00 |
| FNCAC000000023-1 | 06/07/2018 | Transhorn Trucking LLC | Open | 1 - 123 MAIN ST | 41 days | 0.00 | 0.00 |
| FNCAC000000048-1 | 09/20/2018 | Theodore Guiher | Open | 1 - 123 MAIN ST | 0 days | 0.00 | 0.00 |
| test | 04/22/2020 | test | Open | DEFAULT - DEFAULT | 7 days | 0.00 | 0.00 |
| FNCAC000000031-1 | 07/20/2018 | Sean Lincoln | Open | 1 - 123 MAIN ST | 26 days | 0.00 | 0.00 |
| FNCAC000000134-1 | 01/11/2019 | Roger Root | Open | 1 - 123 MAIN ST | 4 days | 0.00 | 0.00 |
| FNCAC000000167-1 | 02/14/2019 | Robert Michael | Open | 1 - 123 MAIN ST | 1 days | 9,494.00 | 9,494.00 |
| FNCAC000000072-1 | 10/20/2018 | Robert Havens | Open | 1 - 123 MAIN ST | 2 days | 17,940.00 | 17,940.00 |
| FNCAC000000262 | 05/06/2019 | Richard Nixon | Open | (Unknown) | 7 days | 17,550.00 | 17,550.00 |
| FNCAC000000050-1 | 09/05/2018 | Pedro Torres | Open | 1 - 123 MAIN ST | 19 days | 0.00 | 0.00 |

Claim Views All Views

All Claims

Filter By Advanced Search

Claim
Number
Driver
Status All
Location
Loss Date to

Search Clear

Recently Viewed

Richard Nixon (FNCAC000000262)
John Smith (1)
Frank Melton (FNCAC000000068-1)



In order to filter the claims, use the right-hand box that says, "Filter By." You can filter by location, claimant name or claim status.

To enter an individual claim, simply click on the claim number.

Individual Claim Page

This screen shows detailed information about the claim.

Claim Notes allow you to access many detailed notes about each claim. Click on "All Notes" to see a list of notes and categories.

Current Financials shows basic financial information about the claim, including paid and incurred for each financial category.

Recent Transaction History lists each recent financial transaction. To see all transactions for this claim, click on "All Transactions" to the right.

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Dashboards Claims Policies Locations Contacts Reports Admin

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Claims > **Frank Melton (FNCAC000000068-1)** ☆

Edit Claim Test Event Close Claim More

Claim Information

| | | | |
|----------------|------------------|--------------------|--|
| Claim Number | FNCAC000000068-1 | Report Date | 10/12/2018 |
| Insured Driver | Frank Melton | Garaging Location | 1 - 123 MAIN ST |
| Adjuster | | Accident State | New Jersey |
| | | Policy | FNCAP00000001 - Fundamental Underwriters |
| Loss Date | 10/06/2018 | Loss Description ① | CV rear-ended IV. |
| Status | Open | Loss Cause | Collision with motor vehicle |

Run Transaction Report for this claim

Full Details

Claim Vehicles

| Vehicle ID | VIN | Make | Model | Year | State | Driver | Owner | Loss Party |
|------------|-------------------|--------|---------|------|--------------|--------------|----------------------|------------|
| 4013 | 1FUJA6CK19DAK4279 | FRTLNR | Tractor | 2009 | Pennsylvania | Frank Melton | Freight Systems Inc. | Insured |
| 4014 | | Dodge | Durango | 2018 | Pennsylvania | Mike Mills | Mike Mills | Claimant |

New Claim Vehicle All Claim Vehicles

Current Financials

| | Paid | Outstanding | Incurred |
|---------------------|------------------|-----------------|------------------|
| + 1st Party | 0.00 | 0.00 | 0.00 |
| + 3rd Party | 32,473.00 | 1,027.00 | 33,500.00 |
| + Expense | 3,303.25 | 196.75 | 3,500.00 |
| - Recovery | 0.00 | 0.00 | 0.00 |
| Net Incurred | 35,776.25 | 1,223.75 | 37,000.00 |

Prior Valuation Show Graph

Recent Transaction History

| Date | Type | Claimant | Primary Coverage | Coverage | Cost Type | Payment | Reserve |
|------------|---|----------|------------------|----------|-----------|----------|-----------|
| 07/16/2019 | 3rd Party Payment | | | | | 9,000.00 | |
| 07/14/2019 | 3rd Party Payment | | | | | 1,000.00 | |
| 07/10/2019 | 3rd Party Reserve | | | | | | 13,500.00 |
| 07/08/2019 | 3rd Party Payment - 3rd Party Payment - NOC | | | | | 7,899.00 | |
| 07/08/2019 | 3rd Party Payment - 3rd Party Payment - NOC | | | | | 4,570.00 | |
| 07/06/2019 | 3rd Party Payment - Liability - General Damages | | | | | 7,899.00 | |

All Transactions

Open Tasks

No open tasks.

All Notes

Settled all claim with the claimant and paid PIP subro to Progressive
Jonathan Szalak on 04/08/2020

Settled this matter for \$2,150.00 Paid 1k PIP subro 5 chiro visits 1 er visit missed on 1 of work as a nanny at \$15.87 (9 hour shift) = \$142.83 the clmt will pay outstanding ER Doctor in the am
Jonathan Szalak on 04/08/2020

Received a call from the claimant's PD insurance adjuster, CLIENT (920-903-5046 Clm# 192549854) at Progressive Insurance who advised the CVD sustained body soreness. Exact injuries are unknown. Unknown
Jonathan Szalak on 04/08/2020

Lft v/m msg for insd poc Saeed 708-663-4843
Jonathan Szalak on 04/08/2020

Created by: RCServices At approximately 1415 on July 23, 2019 - I CLAIMANT was travelling WB on 172 in the left lane. I behand to slowly merge over to the right lane. 90% of my truck / trailer was i
Jonathan Szalak on 04/08/2020

Recent Emails

No emails. Click here to add one.

Contacts

No contacts. Click here to add one.



Claim Alerts

RMIS can send customized claim alerts. For instance, you can be notified whenever a claim is made in a certain location, any updates that are made to a claim and more. If you want to set up a claim alert, please email

support@fundamentaluw.com or call 866-221-0095.

Subject: New Claim Notification: ABC Trucking

A new claim has been received by Fundamental Underwriters. Please see the claim details below and contact your dedicated claim adjuster with any que

Claim Number: FNCAC000001005

Policy: FNCAP00002800 – ABC Trucking

Effective Date: 9/1/2019

Dedicated Adjuster: Jennifer Piper

Adjuster's Email: jennifer.piper@accidentfund.com

Adjuster's Phone: (517) 708-0000

Accident State: Maryland

Loss Cause: SideSwipe

Loss Description: IV sideswiped CV.

Driver's Name: Richard Nixon

Loss Date: 6/30/2020

Report Date: 7/6/2020

Lag Time in Reporting: 6 days

Contacts Page

In the contacts page you will see all the contacts involved in your account. To make changes to this section, please email

support@fundamentaluw.com or call 866-221-0095.

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Navigation: Dashboards Claims Policies Locations Contacts Reports Admin

User: Jonathan Szelak currently working in Fundamental Underwriters Help Sign Out

Contacts

New Contact More

Filter: All Contacts Edit Criteria Edit Columns

| Name | Contact Type ▲ | Work Phone | Cell Phone | Email |
|-------------------|----------------|----------------|------------|----------------|
| George Washington | | (456) 789-1234 | | gw@agency.com |
| Richard Nixon | | (888) 111-1234 | | rn@insured.com |
| Ronald Regan | | (888) 000-1234 | | rr@agency.com |
| Rita Skeeter | | (123) 456-7890 | | rs@insured.com |

Contact Views All Views

All Contacts

Filter By Advanced Search

Name

Contact All ▼

Type

State All ▼

Search Clear



AF Group (Lansing, Mich.) and its subsidiaries are a premier provider of innovative insurance solutions. Insurance policies may be issued by any of the following companies within AF Group:

Accident Fund Insurance Company of America, Accident Fund National Insurance Company, Accident Fund General Insurance Company, United Wisconsin Insurance Company,

Third Coast Insurance Company or CompWest Insurance Company.

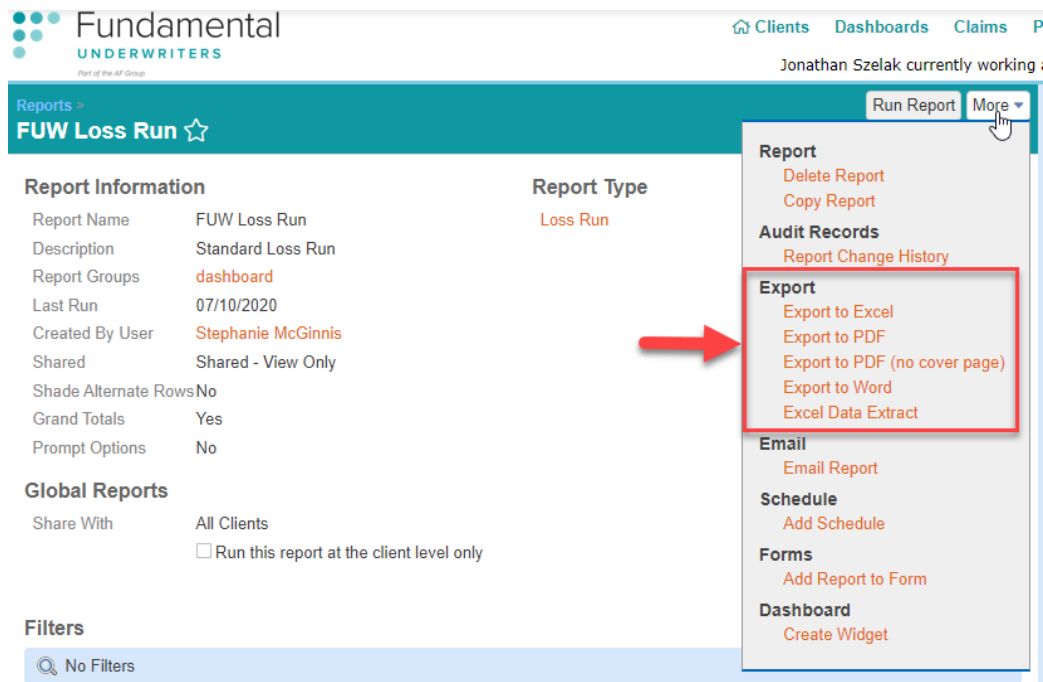
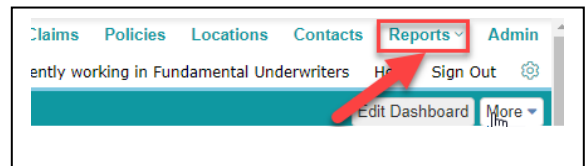
Reports and Reporting

On the reports page, you will see all the types of reports you can run. RMIS offers many different reports that are already created and made available to you. Reports are listed by their name, type, description and the date the report was last run. You can click on any of these headers to sort the list.

Fundamental offers plenty of standard reports, but you also have the ability to build and customize your own.

How to run or export reports

1. First, go to the “Reports” page and select a report you want to run.
2. To run the report within your browser window, simply click **Run Report**.
3. To **export the report** into Excel or a PDF, click on “More” and select the appropriate link.



Report Scheduling

1. After selecting a report, click on **More** -> **Add Schedule**.
2. Choose the frequency you wish to receive the report and when the schedule should begin and end.
3. If you only want to email it to yourself, select **Me** in the “Send To” box, but if you wish to send the scheduled report to others then select **Email list**. In the “Email List” box, enter the emails of the individuals you want to receive the report separated by a comma. E.g. “alvaromorata@anon.com, tommueller@anon.com, jennynguyen@anon.com”



4. Choose what format you would like, e.g. PDF or Excel.
5. If you would like, add a custom subject line and email body.
6. Hit “Save Schedule” on the top right-hand corner of the page.

Create new schedule

Schedule

Frequency:

Run on the selected month(s) each year:

☒ January
 ☒ February
 ☒ March
 ☒ April
 ☒ May
 ☒ June
 ☒ July
 ☒ August
 ☒ September
 ☒ October
 ☒ November
 ☒ December

☐ All ☐ None

Run on this date each month:

or

Run on the: ☐ First of each month

Schedule Starts: Time:

Schedule Ends:

Send To

Send To:

Format:

☐ Send download link instead of actual file

If No Data:

Email List (comma separated):

Email

Reply To Address: ☐ Request Read Receipt

Subject:

Body:

Report/Dashboard Packages

RMIS allows you to group reports and dashboards into a single schedule.

1. On the reports screen, click on **More**, then **Report Packages**.
2. Click **New Report Package** and fill out the relevant general information.
3. Click **Add Report** or **Add Dashboard** and select the report or dashboard you wish to add to the package.
4. Once you are done, hit **Save Changes** and your report package will be saved.
5. To add a schedule, hit **More** on the confirmation page, then **Add Schedule**.



Standard Reports

Fundamental has many reports available to run right away. Existing reports include loss runs, cause analysis, claim description, claim summaries, claim financials and many others!



Reports

[All Reports](#) [Edit Criteria](#) [Edit Columns](#)

| Report Name | all | # | a | b | c | d | e | f | g | h | i | j | k | l | m | n | o | |
|---|-----|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|-----------------------------------|------|
| Report Name ▲ | | | | | | | | | | | | | | | | | Report Type | Cre |
| Claim Summary by Policy | | | | | | | | | | | | | | | | | Claim Summary with Policy | Jon |
| Summary of losses per policy period | | | | | | | | | | | | | | | | | | |
| Detail by Coverage and Policy Number MS Version | | | | | | | | | | | | | | | | | Claim Detail 🔍 | Jon |
| Detail by Coverage and Policy Number MS Version | | | | | | | | | | | | | | | | | | |
| Detail by Location, Cov, Loss Year | | | | | | | | | | | | | | | | | Claim Detail 🔍 | Jon |
| Detail by Location, Coverage and Loss Year | | | | | | | | | | | | | | | | | | |
| FUW Loss Run dashboard | | | | | | | | | | | | | | | | | Loss Run | Stej |
| Standard Loss Run | | | | | | | | | | | | | | | | | | |
| General Cause Analysis dashboard | | | | | | | | | | | | | | | | | Claim Summary with Graph 🔍 | Ricl |
| Summary report for claims by cause | | | | | | | | | | | | | | | | | | |
| General Cause Analysis | | | | | | | | | | | | | | | | | Claim Summary with Graph 🔍 | Ricl |
| Summary report for claims by cause | | | | | | | | | | | | | | | | | | |
| Incurred Paid Change Current Month by Cov, Loc | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred Paid Change Current Month by Coverage and Location | | | | | | | | | | | | | | | | | | |
| Incurred Paid Change Current Quarter by Cov, Loc | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred Paid Change Current Quarter by Coverage and Location | | | | | | | | | | | | | | | | | | |
| Incurred Paid Change Last Month by Cov, Location | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred Paid Change Last Month by Coverage and Location | | | | | | | | | | | | | | | | | | |
| Incurred Paid Change Last Quarter by Cov, Loc | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred Paid Change Last Quarter by Coverage and Location | | | | | | | | | | | | | | | | | | |
| Incurred\Paid Change Current YTD | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred\Paid Change Current YTD by Coverage | | | | | | | | | | | | | | | | | | |
| Incurred\Paid Change Last Quarter | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred\Paid Change Last Quarter by Coverage | | | | | | | | | | | | | | | | | | |
| Incurred\Paid Change Last Year | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred\Paid Change Last Year by Coverage | | | | | | | | | | | | | | | | | | |
| Incurred\Paid Change Previous Month | | | | | | | | | | | | | | | | | Financial Comparison Summary 🔍 | Jon |
| Incurred\Paid Change Previous Month Sorted by Coverage | | | | | | | | | | | | | | | | | | |
| Lag Time Grouping w/ Graph dashboard | | | | | | | | | | | | | | | | | Claim Summary with Ad Hoc Graph 🔍 | Jon |
| Lag Time Groupings | | | | | | | | | | | | | | | | | | |
| Loss Run - All Claims | | | | | | | | | | | | | | | | | Loss Run 🔍 | Jon |
| Loss Run of All Claims by Coverage and Loss Year | | | | | | | | | | | | | | | | | | |
| Loss Run - Open Claims dashboard | | | | | | | | | | | | | | | | | Loss Run 🔍 | Jon |



AF Group (Lansing, Mich.) and its subsidiaries are a premier provider of innovative insurance solutions. Insurance policies may be issued by any of the following companies within AF Group:
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Fundamental Loss Runs

Loss run reports are great for looking at detailed loss runs which can be scheduled and filtered by Status, Loss Description and Claim Financials. For more information on filtering and grouping, see page 21.

Show Options Save a Copy Refresh Report

FUNDAMENTAL UNDERWRITERS

| Claim Number | Status | Report Date | Loss Date | State | Loss Description | Driver | Liability Paid | Liability Incurred |
|-------------------------------------|--------|-------------|-----------|-------|---|--|----------------|--------------------|
| Policy Number: FNCAP00002300 | | | | | | | | |
| Incident Only?: None | | | | | | | | |
| 000000262 | O | 5/13/2019 | 5/6/2019 | TX | IV backed into OV | Richard Nixon | 0 | 0 |
| Totals for None - 1 Claims | | | | | | | 0 | 0 |
| Totals for FNCAP00002300 - 1 Claims | | | | | | | 0 | 0 |
| Policy Number: FNCAP00000100 | | | | | | | | |
| Incident Only?: None | | | | | | | | |
| 00000004-1 | O | 4/16/2018 | 4/13/2018 | NY | IVD backed up and struck CV. | MSV Transportation | 0 | 0 |
| 00000007-1 | O | 4/30/2018 | 4/27/2018 | NJ | Insured vehicle backed into claimant vehicle. | lansway Transit Systems | 0 | 0 |
| 00000009-1 | O | 5/25/2018 | 5/23/2018 | MA | IVD reentered the roadway and was struck by CV. | Trent Sherwood | 0 | 0 |
| 00000010-1 | O | 5/26/2018 | 5/9/2018 | NJ | IV rear ended CV. while changing lanes. | Mannix Washington | 0 | 0 |
| 00000011-1 | O | 5/30/2018 | 5/30/2018 | NY | CV1 rear-ended CV2 causing CV2 to rear-end IV. | Bolus Freight Systems Inc. and Bolus Motor Lines, Inc. | 0 | 0 |

- For more information on scheduling Loss Runs, see page 16.
- If you would like to see additional information on your Loss Runs, please email support@fundamentaluw.com or call 866-221-0095.

Claim Summary Reports

Claim summary reports are great for looking at a brief summary of the claims based on locations or policy. Each of these can be customized to group by different fields, such as location, cause or claim type.

FUNDAMENTAL UNDERWRITERS

Valued as of 07/10/2020

| Cause | Claim Count | Total Incurred | Total Paid |
|------------------------------|-------------|----------------|------------|
| Collision with motor vehicle | 30 | 168,510 | 167,286 |
| Slid On Ice/Rain | 4 | 143,275 | 143,275 |
| Following Too Close | 2 | 31,675 | 31,675 |
| Improper Backing | 11 | 27,044 | 27,044 |
| Glass | 3 | 8,092 | 8,092 |
| Grand Totals | 50 | 378,596 | 377,372 |



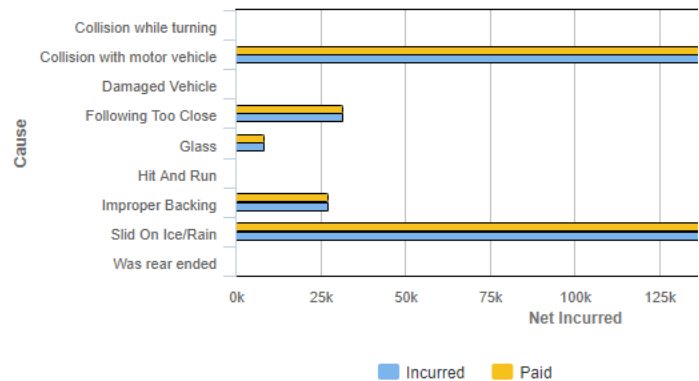
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Cause Analysis Reports

Cause analysis reports are great for analyzing your loss sources.

FUNDAMENTAL UNDERWRITERS

Valued as of 07/10/2020



| Cause | Claim Count | Total Incurred | Total Paid |
|------------------------------|-------------|----------------|----------------|
| Collision while turning | 1 | 0 | 0 |
| Collision with motor vehicle | 30 | 168,510 | 167,286 |
| Damaged Vehicle | 1 | 0 | 0 |
| Following Too Close | 2 | 31,675 | 31,675 |
| Glass | 3 | 8,092 | 8,092 |
| Hit And Run | 1 | 0 | 0 |
| Improper Backing | 11 | 27,044 | 27,044 |
| Slid On Ice/Rain | 4 | 143,275 | 143,275 |
| Was rear ended | 1 | 0 | 0 |
| Grand Totals: | 54 | 378,596 | 377,372 |

Claim Financial Reports

Claim financial reports are great for getting a detailed look at all claims in one place. They are especially great for accounts with a deductible, since they allow you to see the amount subrogated or the deductible recovered.

FUNDAMENTAL UNDERWRITERS

| Transaction Date | Claim Number | Claimant | Type |
|--|------------------|-----------------|-----------------------|
| Claim Number: FNCAC000000060-1 | | | |
| 7/4/2019 | FNCAC000000060-1 | Paul Killiany | 3rd Party Payment - L |
| 1/19/2019 | FNCAC000000060-1 | Paul Killiany | 3rd Party Payment - L |
| 4/5/2019 | FNCAC000000060-1 | Paul Killiany | 3rd Party Payment - L |
| 3/4/2019 | FNCAC000000060-1 | Paul Killiany | 3rd Party Payment - L |
| 5/12/2019 | FNCAC000000060-1 | Paul Killiany | 3rd Party Payment - L |
| 7/9/2019 | FNCAC000000060-1 | Paul Killiany | 3rd Party Payment - L |
| Totals for FNCAC000000060-1 - 6 Transaction(s) | | | |
| Claim Number: FNCAC000000061-1 | | | |
| 4/12/2019 | FNCAC000000061-1 | Matthew Haberek | 3rd Party Payment - L |
| 7/3/2019 | FNCAC000000061-1 | Matthew Haberek | 3rd Party Payment - L |
| 7/1/2019 | FNCAC000000061-1 | Matthew Haberek | 3rd Party Payment - L |
| 1/11/2019 | FNCAC000000061-1 | Matthew Haberek | 3rd Party Payment - L |
| 2/7/2019 | FNCAC000000061-1 | Matthew Haberek | 3rd Party Payment - L |
| Totals for FNCAC000000061-1 - 5 Transaction(s) | | | |
| Claim Number: FNCAC000000065-1 | | | |
| 7/16/2019 | FNCAC000000065-1 | David Smith | 3rd Party Payment - L |
| 7/17/2019 | FNCAC000000065-1 | David Smith | 3rd Party Payment - L |
| 7/12/2019 | FNCAC000000065-1 | David Smith | 3rd Party Payment - L |
| 7/17/2019 | FNCAC000000065-1 | David Smith | 3rd Party Payment - L |
| 7/8/2019 | FNCAC000000065-1 | David Smith | 3rd Party Payment - L |
| 7/16/2019 | FNCAC000000065-1 | David Smith | 3rd Party Payment - L |



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Building Custom Reports

While Fundamental offers many standard, out-of-the-box reports, you may want to see your own custom information, see the information grouped in a certain way or limit the report to certain locations, years, etc. In order to create a customized report, go to the report page and click on the **New Report** button.

The screenshot shows the Fundamental Underwriters Reports interface. At the top, there's a navigation bar with links to Dashboards, Claims, Policies, Locations, Contacts, Reports, and Admin. Below this, a user status bar indicates 'Jonathan Szelak currently working in Fundamental Underwriters'. The main section is titled 'Reports' and includes a 'New Report' button highlighted with a red arrow. Below the button is a table of existing reports. The table has columns for Report Name, Report Type, Created By, Last Run, and Actions. The first report is 'Claim Summary by Policy' with a 'Claim Summary with Policy' type, created by Jonathan Szelak on 06/16/2020. Other reports include 'Detail by Coverage and Policy Number MS Version', 'Detail by Location, Cov, Loss Year', 'FUW Loss Run', 'General Cause Analysis', and 'General Cause Analysis'. On the right side, there's a 'Report Views' section with filters for Name, Description, Type, Created, By, and Shared. Below this is a 'Report Groups' section with checkboxes for 'dashboard' and 'No Tags'.

You will be prompted to select a report type. We offer many different report types, from detailed financial reports to claim narrative detail reports. All have a brief description along with the type of report (detailed, summary or graphic). Select the report type you want to use by clicking the report's name.

- Type a custom report name for the report you are trying to create in the “Report Name” box.
- The “Title” will show at the top. If blank, the report will display the Report Name.
- A private report is only visible to you. To make a report visible to others, change this to “Shared.”
- To see claim information as it was valued as of a certain date, enter that date into the “Valuation Date” field.

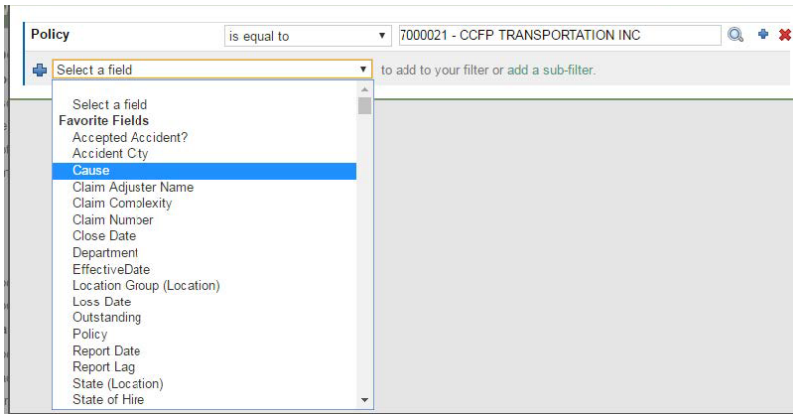
The screenshot shows the 'New Report' form. It has a 'Report Information' section with fields for Report Name, Description, Title, Subtitle, and Comments. Below this is a 'Report Groups' section with a 'Shared' dropdown set to 'Private'. There are also checkboxes for 'Report Type', 'Shade Alternate Rows', 'Grand Totals', and 'Prompt Options'. At the bottom, there's a 'Filters' section with a 'No Filters' button and a 'Group By' section with a 'Select a field' dropdown.



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Filtering, Grouping, and Sorting

After you've chosen a report type, it's time to customize. Almost any report template can be filtered, grouped and /or sorted.

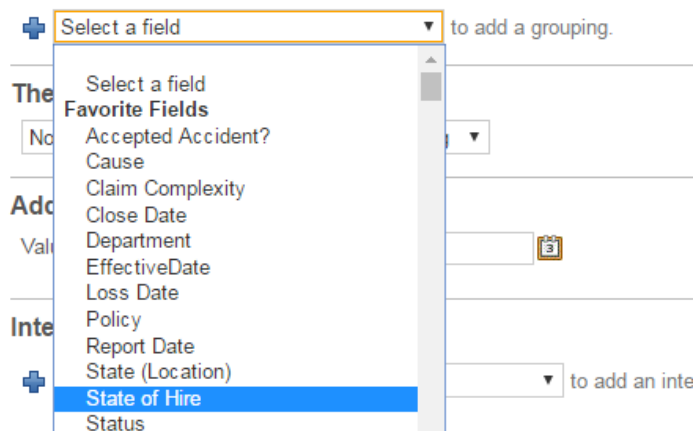


Filtering in Reports

To see results from certain locations, years, claim types and more, consider adding a filter. For instance, if you want loss runs that only show losses from Georgia, add a filter on **Accident State** and choose Georgia.

To add a filter, click on **Edit Filters** and select a field. You may need to click on the magnifying glass to choose from the available options.

Group By



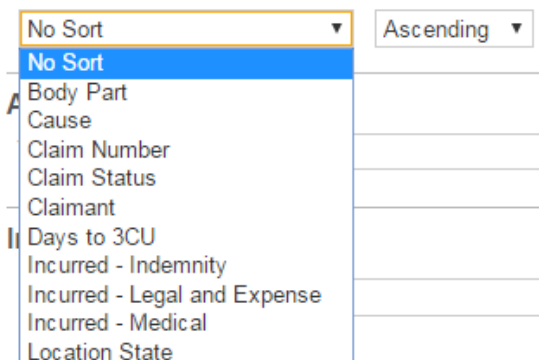
Grouping Reports

Unlike filtering, grouping has to do with how the data is presented in the report. This groups data together and provides subtotals for states, claim types, claim causes and much more. To group your report, click **Group By** and select a field. You can add a secondary grouping, if you wish.

If you would like to start a new page with each group, select "Page Break."

For date fields, be sure to choose "Group Annually," "Group Monthly" or "Group Daily" to limit or widen the range of the group.

Then Sort By



Sorting Reports

Sorting simply determines the order in which the data is shown. You can sort by claim date, incurred value, alphabetically and more.

Select Ascending or Descending to choose the order of the data.



Common Fields (to sort, group or filter):

Policy – this simply refers to the policy that covered the claim. You might choose to use this for grouping if you want subtotals by policy or use it for filtering to see losses from only one policy.

Accident State – Accident State refers to the location where the accident occurred.

Claim Status – this refers to whether the claim is open, closed or reopened. To see claims that are currently open, you can choose “Status is equal to open OR reopened” or simply “Status is NOT equal to closed.”

Loss Date – refers to the date when the claim occurred (as opposed to the year the policy was written). If grouping, be sure to choose your date grouping (Annually, Quarterly, Monthly or Daily). This will allow you to filter or group all losses from a particular year, quarter, month or day.

Group By

Loss Date Ascending ▼ No Page Break ▼ Group Annually ▼ ☒ Group Totals ✕

+ Select a field ▼ to add a grouping.

Loss Location Grouping and Filtering

RMIS offers many ways to group by location. The most common is simply using the field “Loss Location” or “Location Name,” but you may want to group locations.

Want to Dive Deeper?

Contact your Fundamental underwriter today to get specific recommendations for your business and to identify potential risks before they become a larger issue.

