

# *Welcome to*



**brokervisionlive**  
professional interactive claims management

## *An Introduction and Guide*





brokervisionlive  
professional interactive claims management

The **FREE** simple to use database system developed by Public Loss Adjusters to administer domestic and commercial claims.

This allows **YOU** the opportunity to answer all **YOUR** client's queries, in real time with accurate information updated every 24 hours



- This is the log on screen which is accessed via the direct Broker Vision Live link on the Public Loss Adjusters website ([www.publiclossadjusters.com](http://www.publiclossadjusters.com)) and allows you secure access to the 24 hour updated copy of the Public Loss Adjusters Claims database.
- You must enter the unique BV User reference allocated to you followed by the password for the specific claim you wish to view.
- This password is always the Public Loss Adjusters mandate number printed on the top right of the client authorisation mandate signed by the policyholder at the time of a claim event.
- This provides you and/or your client with a unique security access point. Immediately following the appointment by your client and the signing of the mandate, Public Loss Adjusters will advise the insurer of their appointment and will copy you with the confirmation providing you with the mandate number (Password).
- Having entered the above information - Click OK to open Broker Vision Live.

The screenshot shows the BrokerVisionLive dashboard for Mr. Tony Mulligan. At the top, there are navigation tabs for 'Dashboard', 'My Details', 'My Claim', and 'Log Out'. The main content area is divided into several sections:

- My Details:** A section containing contact information for Mr. Tony Mulligan, including Contact ID: 45, Customer Name, Broker User, and a link to view contact details.
- Claim Status:** A table showing claim details. One claim is listed with a status of 'Completed' and a date of '20 May 2011'. A link 'View Claim Details' is provided.
- Next Action:** A section with a red header showing 'Next Action Due: Closed File' and 'Next Action Date:'. A link 'View Claim Details' is also present.

Three callout boxes provide additional context:

- A blue box points to the 'My Claim' tabs, stating: "Use either of the My Claim tabs to access the claim details."
- A green box points to the 'Next Action' section, stating: "This box shows the last action on the claim"
- A red box points to the 'Next Action' section, stating: "This box shows the next action proposed and when it is scheduled to be completed"

- The first thing you will see is the 'Progress/Outstanding Actions' screen which allows you to instantly answer the two most common queries from **YOUR** Customer the Policyholder.
- This gives you an opportunity to provide accurate and up to date information on the progress of the claim without the need to telephone or email the insurers or their representatives, saving you valuable time.
- To view any aspect of the claim in detail Click the My Claim Tab either at the top or the link in the lower right corner of the green section.

The screenshot shows a web browser window with the URL `brokervisionlive.com/myclaim.asp`. The page header includes the logo for 'brokervisionlive professional interactive claims management' and the user name 'Mr Tony Mulligan'. Below the header is a navigation bar with tabs for 'Dashboard', 'My Details', 'My Claim', and 'Log out'. The main content area is divided into two sections: 'Claim Information' and 'Claim Progress'.

**Claim Information**

Date of incident:	20 May 2011	AMPM Claim Manager:	Russell
User Reference:	BV11/2005/1	AMPM Claim Manager Phone:	07944++++
Policy No.:	FF00001523***	Contact ID:	45
Insurance Claim Reference:	AMP11303	Added On:	20 May 2011
Insurer:	AGEAS {view}	Insurer's Loss Adjuster:	Julie xxx
Insurer's FSA Compliance Contact:		Loss Adjusting Company:	xxx Loss Adjusters
Contractors Liability in place:	Yes	Loss Adjuster's Ref:	5502793E
Customer Advised:		Loss Adjusting Company Phone:	0191*****
Completed:	Yes	Loss Adjusting Company Email:	*****

**Claim Progress**

Work Authorised:	Yes
Current Claim Status:	Completed
Updated:	20 May 2011
Next Action Due:	Closed File
Next Action Date:	

At the bottom of the page, there is a navigation bar with tabs: 'Claim Details', 'Mandates', 'Payments', 'Calls', 'Estimates', 'Invoices', 'Scans', 'Emails Received', 'Emails Sent (Int)', and 'Emails Sent (Ext)'. A red callout box points to the 'Mandates' tab with the text: 'Click this tab to view the Public Loss Adjusters Mandate which provides the unique Ref. No: allowing access to the claim file'.

- As you can see the Policyholders information is shown with a number of information tabs below.
- Each one shows the details and/or copies of the relevant information with the date the action was updated if applicable.
- For example if you or the insurer needs to see the mandated authority for Public Loss Adjusters to act on the Policyholders behalf click the tab Mandates and the relevant screen opens instantly.

The screenshot shows a web browser window with the URL `brokervisionlive.com/myclaim.asp?view=2#tabs`. The page has a navigation bar with 'Dashboard', 'My Details', 'My Claim', and 'Log out'. The main content is divided into two sections: 'Claim Information' and 'Claim Progress'.

**Claim Information:**

Date of incident:	20 May 2011	AMPM Claim Manager:	Russell
User Reference:	BV11/2005/1	AMPM Claim Manager Phone:	07944++++
Policy No:	FF00001523***	Contact ID:	45
Insurance Claim Reference:	AMPM11303	Added On:	20 May 2011
Insurer:	AGEAS (view)	Insurer's Loss Adjuster:	Julie xxx
Insurer's FSA Compliance Contact:		Loss Adjusting Company:	xxx Loss Adjusters
Contractors Liability in place:	Yes	Loss Adjuster's Ref:	5502793E
Customer Advised:		Loss Adjusting Company Phone:	0191*****
Completed:		Loss Adjusting Company Email:	*****

**Claim Progress:**

Work Authorised:

Current Claim Status:

Updated:

Next Action Due: **Closed File**

Next Action Date:

Below the progress section is a row of tabs: Claim Details, Mandates, Payments, Calls, Estimates, Invoices, Scans, Emails Received, Engagement (Int), Emails Sent (Ext), and Contractors. The 'Mandates' tab is selected.

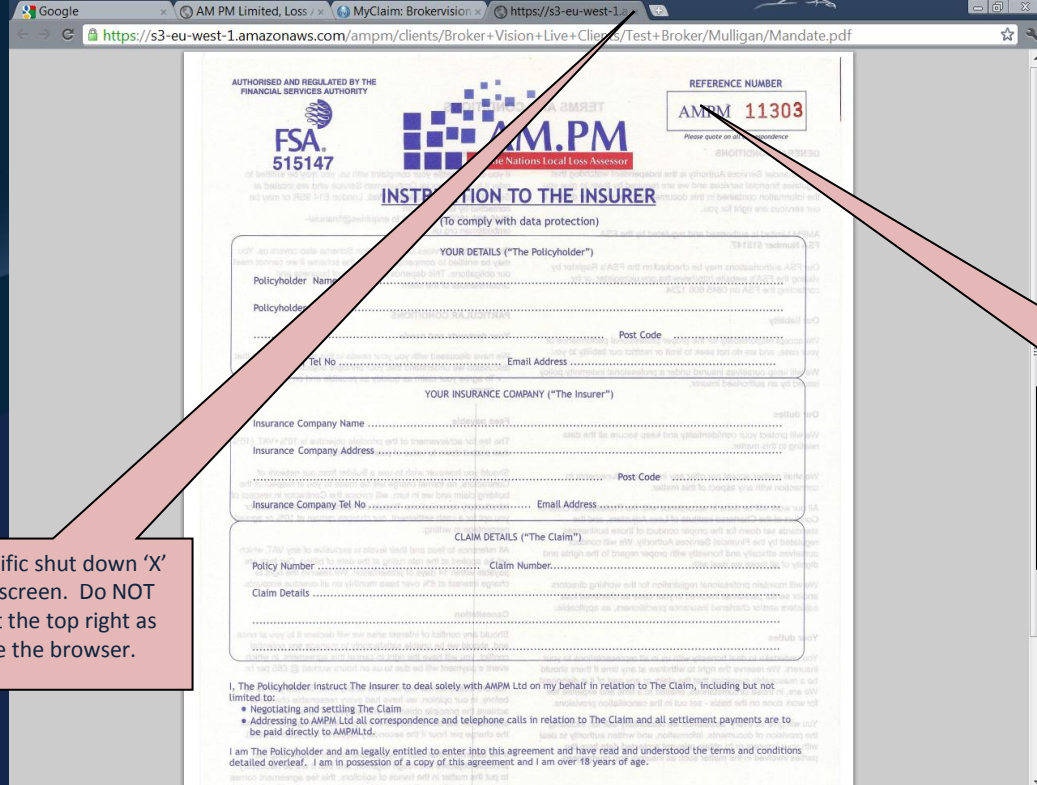
A red callout box with white text says: "Click this tab to view the AMPM Mandate which provides the unique Ref. No: allowing access to the claim file". An arrow points from this box to the 'View' icon in the document list below.

**Mandates List:**

Document	Date	View
Mulligan Mandate.pdf	17 September 2010	

At the bottom of the page, it says: "Broker Vision Live NT System V2.0 ONLINE © Copyright AMPM Ltd 2011. All Rights Reserved".

- When the relevant screen opens if you now click on the small 'View Icon' at the right hand side of the entry it will open the actual copy of the Mandate.



Use the specific shut down 'X' to close this screen. Do NOT use the 'X' at the top right as this will close the browser.

This is the AMPM Mandate reference which provides the unique Ref. No: allowing access to the claim file

- You can scroll through the document to read it and if you look at the reference number at the top right the number shown is and will always be the password for you to see the particular claim details.
- Click the shut down X on the specific tap at the top of the file and the file closes.
- This will return you to the main claim screen. You can now view any other items simply by clicking on the Tab which corresponds with the area you wish to view.

The screenshot shows a web browser window with the URL `brokervisionlive.com/myclaim.asp?view=2#tabs`. The page has a navigation bar with tabs: **Dashboard**, **My Details**, **My Claim**, and **Log out**. The main content area is divided into two sections: **Claim Information** and **Claim Progress**.

**Claim Information**

Date of incident:	20 May 2011	AMPM Claim Manager:	Russell
User Reference:	BV11/2005/1	AMPM Claim Manager Phone:	07944++++
Policy No.:	FF00001523***	Contact ID:	45
Insurance Claim Reference:	AMPM11303	Added On:	20 May 2011
Insurer:	AGEAS (view)	Insurer's Loss Adjuster:	Julie xxx
Insurer's FSA Compliance Contact:		Loss Adjusting Company:	xxx Loss Adjusters
Contractors Liability in place:	Yes	Loss Adjuster's Ref:	5502793E
Customer Advised:		Loss Adjusting Company Phone:	0191*****
Completed:	Yes	Loss Adjusting Company Email:	*****

**Claim Progress**

Work Authorised:	Yes
Current Claim Status:	Completed
Updated:	20 May 2011
Next Action Due:	Closed File
Next Action Date:	

Below the progress section is a navigation menu with tabs: **Claim Details**, **Mandates**, **Payments**, **Calls**, **Estimates**, **Invoices**, **Scans**, **Emails Received**, **Emails Sent (Int)**, **Emails Sent (Ext)**, and **Contractors**. The **Calls** tab is highlighted with a red arrow pointing to a call log table.

Please find below a list of attached mandate documents. Simply click the view icon on the right to view.

Document	Date	View
Mulligan Mandate.pdf	17 September 2010	

At the bottom of the page, there is a footer: `brokervisionlive.com/mydetails.asp` and copyright information: `Broker Vision Live NT System V2.0 ONLINE © Copyright AMPM Ltd 2011. All Rights Reserved`.

Use the relevant Tab to access the details of a particular area of interest such as Calls

- For example, if you want to monitor the calls made click the Calls Tab and the screen shows the call logs with the latest call at the top.
- This will take you instantly to the call log screen showing ALL calls made on this specific claim with details of each call.



Google | AM PM Limited, Loss | MyClaim: Brokervision | brokervisionlive.com/myclaim.asp?view=4#tabs

Claim Details | Mandates | Payments | Calls | **Estimates** | Invoices | Scans | Emails Received | Emails Sent (Int) | Emails Sent (Ext) | Contractors

Please find below a list of made and scheduled calls.

Action	Made By & Date	Linked Doc	Action Performed	Follow up Comments	Complete
Payment received	russell on 20 May 2011		on 20 May 2011		No
spoke to Matt at insurers advised payment sent today	russell on 15 December 2010		Denise on 20 December 2010	to receive pay	
rang spoke to Colin xxxx advised report went to insurers 8/12/10	russell on 10 December 2010		Denise on 10 December 2010	to chase insurers	Yes
rang insurers no report from LA	russell on 22 November 2010		Denise on 22 November 2010	to chase LA for report to be sent time scale	Yes
rang LA no answer left message	russell on 21 November 2010		Denise on 22 November 2010	to ring insurers	Yes
rang LA no answer so left message	russell on 18 November 2010		Denise on 20 November 2010	to keep chasing to make sure report has gone to insurers	Yes
sent for payment 9/11/10	russell on 09 November 2010		Denise on 20 November 2010	to chase payment	Yes
received final account from contractor	russell on 08 November 2010		Russell on 09 November 2010	to send for payment	Yes
	russell on 29 October 2010		Russell on 29 October 2010	to send mandate	Yes
	russell on 27 October 2010		Russell on 27 October 2010	await authorisation to proceed	Yes
	russell on 22 October 2010		Russell on 22 October 2010	to submit to LA	Yes
received go ahead on extra works from LA	russell on 21 October 2010		Russell on 21 October 2010	to tell contractor to carry on	Yes
sent email to LA regards to extra works estimate and pics	russell on 21 October 2010		Russell on 21 October 2010	get reply chase if nothing	Yes
spoke to Drying contractor and asked for estimate	russell on 21 October 2010		Russell on 21 October 2010	to receive report	Yes
received confirmation drying contractor will be on site 9:30	russell on 21 October 2010		Russell on 21 October 2010	PH is fine rang expect report for drying	Yes
received call from contractor to advise on starting works found wet behind base units	russell on 20 October 2010		Russell on 20 October 2010	to let LA know and receive estimate for extra works	Yes
rang spoke to contractor he is fine with price	russell on 27 September 2010		Russell on 27 September 2010	to send acceptance to LA and go ahead to contractor	Yes
received email from LA with settlement	russell on 24 September 2010		Russell on 24 September 2010	to give contractor go ahead	Yes
Sent email to LA with revised estimate	russell on 24 September 2010		Russell on 24 September 2010	to get settlement proposal	Yes
spoke to contractor, insurers all fine get estimate over	russell on 24 September 2010		Russell on 24 September 2010	to send estimate	Yes
spoke to LA she advised she wouldnt allow gloss work redecorate radiator and sink only 1 cut out	russell on 24 September 2010		Russell on 24 September 2010	to speak to contractor and send revised estimate	Yes
sent estimate and invoice for emergency works	russell on 21 September 2010		Russell on 21 September 2010	to get reply	Yes

Use the Slider Bar to access information down the screen

Use the relevant Tab to access the details of a particular area of interest such as Estimates

- In this specimen claim you can see the actual calls made in the order they were made, with an easy to follow sequence of events providing you with a reasonable insight into the progress allowing you to follow the claim from cradle to grave.
- Use the slider bar at the right hand side to scroll down the page for older call details.
- By using any of the other 'Tabs' the detailed information is available relevant to that section.
- In the Estimate section of this particular case there were 2 items, again by clicking on the view icon at the right of a particular event you can see the actual document.

Use the relevant View Icon to access the details of a particular area of interest .

Claim Information			
Date of incident:	20 May 2011	AMPM Claim Manager:	Russell
User Reference:	BV11/2005/1	AMPM Claim Manager Phone:	07944++++
	FF00001523***	Contact ID:	45
	AMPM11303	Added On:	20 May 2011
	AGEAS (view)	Insurer's Loss Adjuster:	Julie xxx
		Loss Adjusting Company:	xxx Loss Adjusters
	Yes	Loss Adjuster's Ref:	5502793E
Customer Advised:		Loss Adjusting Company Phone:	0191*****
Completed:		Loss Adjusting Company Email:	*****

Claim Progress	
Work Authorised:	Yes
Current Claim Status:	Completed
Updated:	20 May 2011
Next Action Due:	Closed File
Next Action Date:	

Claim Details | Mandates | Payments | Calls | Estimates | Invoices | Scans | Emails Received | Emails Sent (Int) | Emails Sent (Ext) | Contractors

Please find below a list of estimate attached as documents. Simply click the view icon on the right to view.

Estimate Document Name	View
Estimae following EOW 201010001.pdf	
Drying Report.pdf	

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- Again by using the View Icon the actual document is shown allowing you to see all of the details and be fully up to date with the current situation allowing **YOU** to be able to answer any queries **YOUR** customer asks with authority and accuracy.
- This maintains the professional relationship between you and your customer and leads to retention of business and greatly reduced complaints.

Google | AM PM Limited, Loss / x | MyClaim: Brokervision x | https://s3-eu-west-1-... | https://s3-eu-west-1.amazonaws.com/amprm/clients/Broker+Vision+Live+Clients/Test+Broker/Mulligan/Estimate+following+EOW+2010100

### ESTIMATED REPAIR COST

This estimate is based upon damage visible at the time of inspection and incorporates a twelve month guarantee on workmanship

Surveyor's Name: [REDACTED]  
 Date: [REDACTED]  
 Ref: ampm 20101

TO: [REDACTED]

Sub Total £3,428.79  
 Adjustment on rates  
 Net Total £3,428.79  
 VAT £600.04  
 Total £4,028.83

Anticipated Duration of work in DAYS [REDACTED]

Code	Description	Qty		
k1001	Take out and later refit built in appliances	3	Item	£115.50
k1003	Carefully remove and later refix/re-plumb sink	1	Item	£102.71
k1004	Remove worktop for disposal	6	lm	£25.68
k1006	Take out existing kitchen base units for disposal	2	Item	£25.66
k1007	Carefully take out, set aside and later refit kitchen base units.	4	Item	£102.68
k1010	Fit existing door/drawer to new or existing carcass	6	Item	£38.52
k1013	Install kitchen base unit any size	1	Item	£51.34
k1014	Install kitchen sink unit including cut outs and adaptations for pipe work as required	1	Item	£77.02
k1017	Install standard worktop	6	lm	£236.88
k1018	Cut opening for hob or sink unit	1	Item	£17.11
k1019	Cut mason mitre to worktop joint	2	Item	£86.80
k1024	Fit Plinths	6	lm	£50.76
k1025	Additional labour cost to build up flat pack units	2	Item	£51.36
h1004	Remove and reconnect radiator on existing brackets	1	Item	£30.35
g1003	Debris Removal	5	cu mtr	£163.50
f1005	Remove and dispose vinyl sheet covering. Supply & install 2.5 mm std vinylsheet covering ( pc	15.1	sm	£569.72
f1010	Remove, dispose and renew 18mm chipboard/ply flooring	15.1	sm	£384.45
f1016	Remove, dispose and renew polystyrene insulation 50mm	15.1	sm	£132.28
e1001	Partial electrical test (Minor Works) on affected circuits only and produce minor works certificate.	1	Item	£121.41
c1025	Paint existing ceiling.	15.1	sm	£98.00
c1001	Install working platform less than 2m high to conform to working at height regulations.	1	wk	£35.93
w1023	Emulsion (2 coats) to walls - all types	38	sm	£235.60
w1027	Repaint architraves	5	lm	£27.75
w1029	Repaint door lining	5	lm	£27.75
w1034a	Supply and install 100mm timber skirting board, prime and gloss	10	lm	£124.60
w1025	Repaint/stain or varnish single leaf door (single side only)	2	side	£45.44
w1012	Repaint/stain or varnish double leaf door (single side only)	2	side	£45.44

Use the specific shut down 'X' to close this screen. Do NOT use the 'X' at the top right as this will close the browser.

- By scrolling down the actual document you can see any/all information and answer any queries with full authority.
- Total transparency is available as there is full disclosure and Public Loss Adjusters are of the opinion that the Policyholder has a right to see any/all aspects of their claim.
- Again to close this screen use the specific 'X' on the relevant tab at the top of the screen.

Google | AM PM Limited, Loss | MyClaim: Brokervision | brokervisionlive.com/myclaim.asp?view=5#tabs

### Claim Information

Date of incident:	20 May 2011	AMPM Claim Manager:	Russell
User Reference:	BV11/2005/1	AMPM Claim Manager Phone:	07944++++
Policy No.:	FF00001523***	Contact ID:	45
Insurance Claim Reference:	AMP11303	Added On:	20 May 2011
Insurer:	AGEAS {view}	Insurer's Loss Adjuster:	Julie xxx
Insurer's FSA Compliance Contact:		Loss Adjusting Company:	xxx Loss Adjusters
Contractors Liability in place:	Yes	Loss Adjuster's Ref:	5502793E
Customer Advised:		Loss Adjusting Company Phone:	0191*****
Completed:	Yes	Loss Adjusting Company Email:	*****

### Claim Progress

Work Authorised:	Yes
Current Claim Status:	Completed
Updated:	20 May 2011
Next Action Due:	Closed File
Next Action Date:	

Claim Details | Mandates | Payments | Calls | Estimates | **Scans** | Emails Received | Emails Sent (Int) | Emails Sent (Ext) | Contractors

Please find below a list of estimate attached as documents. Simply click the view icon on the right to view.

Estimate Document Name	View
Estimae following EOW 201010001.pdf	
Drying Report.pdf	

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- If you wish you can even see the pictures of the damage by clicking on to the Scans Tab and then the relevant document as shown below opens and the actual photos can be viewed.

The screenshot shows a web browser window with the URL `brokervisionlive.com/myclaim.asp?view=7#tabs`. The page displays claim information for user `BV11/2005/1` and policy `FF00001523***`. A callout box points to a 'View' icon in a table of documents.

**Claim Details:**

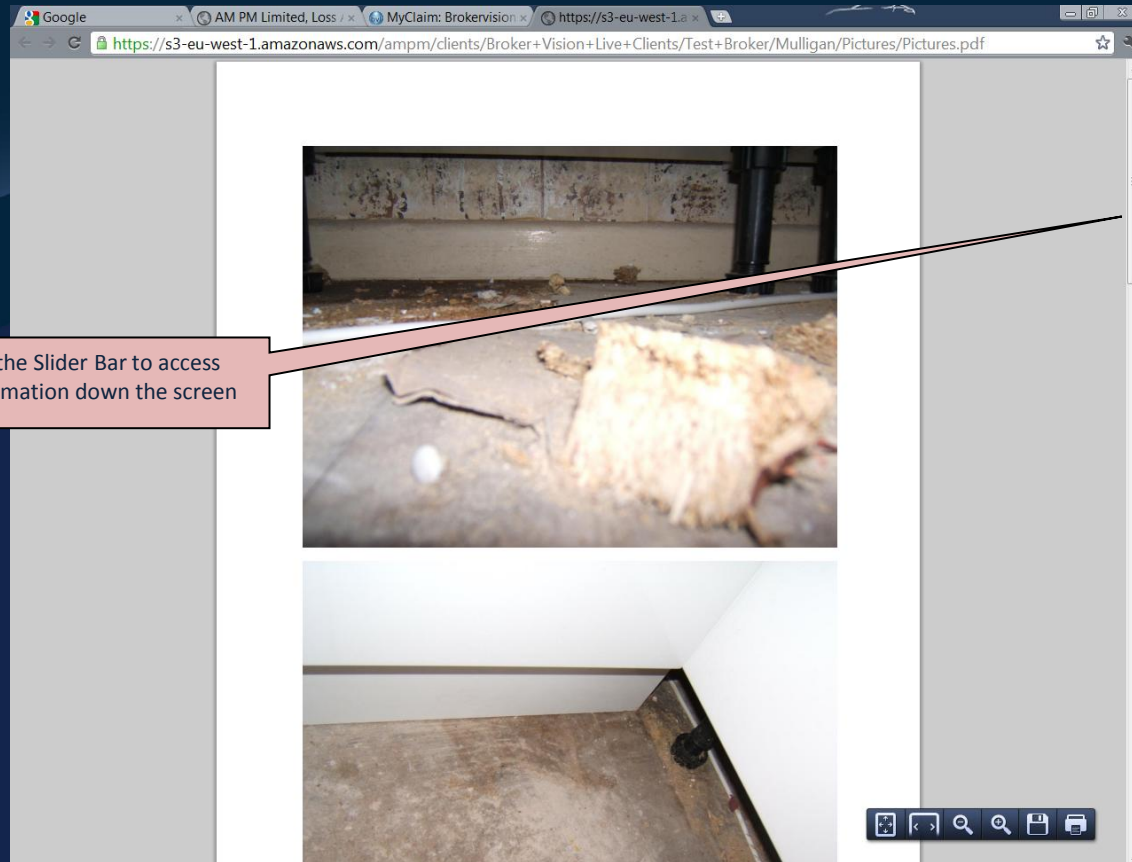
User Reference:	BV11/2005/1	AMPM Claim Manager Phone:	07944++++
Policy No.:	FF00001523***	Contact ID:	45
Insurance Claim Reference:	AMPM11303	Added On:	20 May 2011
Insurer:	AGEAS (view)	Insurer's Loss Adjuster:	Julie xxx
Insurer's FSA Compliance Contact:		Loss Adjusting Company:	xxx Loss Adjusters
Work Authorised:	Yes	Loss Adjuster's Ref:	5502793E
Current Claim Status:	LO	Loss Adjusting Company Phone:	0191*****
Updated:	20 May 2011	Loss Adjusting Company Email:	*****
Next Action Due:	Closed File		
Next Action Date:			

**Document List:**

Document	Date	View
Pictures	30 June 2011	
drying invoice.pdf	20 June 2011	
Cheque receipt	20 June 2011	
settlement mandate signed.pdf	20 June 2011	
Sat note signed.pdf	20 June 2011	
settlement letter from merlin.pdf	22 June 2011	

Use the relevant View Icon to access the details of a particular area of interest .

- You are able to see any of the documents or pictures simply by clicking the relevant View Icon at the right of the particular item you wish to view



- You are able to see all of the pictures simply by using the scroll bar at the right hand side of the particular item you wish to view

Insurer's FSA Compliance Contact: Loss Adjusting Company: xxx Loss Adjusters

Contractors Liability in place: Yes Loss Adjuster's Ref: 5502793E

Customer Advised: Completed: Yes Loss Adjusting Company Phone: 0191\*\*\*\*\*

Loss Adjusting Company Email: \*\*\*\*\*

Completed: 20 May 2011

Closed File

Next Action:

Claim Details | Mandates | Payments | Estimates | Invoices | Scans | Emails Received | Emails Sent (Int) | Emails Sent (Ext) | Contractors

Please find below a list of External Emails Sent. Simply click the view icon to the right to view.

Email Description	Date	View
sent email to LA accepting price.pdf	20 June 2011	
revised estimate sent to LA.pdf	20 June 2011	
New settlement.pdf	20 June 2011	
instructions to insurers 2.pdf.pdf	20 June 2011	
go ahead to contractor.pdf.pdf	20 June 2011	
final account to LA.pdf.pdf	20 June 2011	
email to LA with report for drying.pdf.pdf	20 June 2011	
email to LA with invoice and estimate.pdf	20 June 2011	
email to LA with estimate for extra works and pics.pdf	20 June 2011	

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Use the relevant View Icon to access the details of a particular area of interest .

- If you need to review any communication between Public Loss Adjusters and any of the various parties simply click on the relevant Tab.
- All emails and related communications are also fully recorded providing in depth information on how the claim is progressing and the various details regarding the claim are all shown
- Again by using the view icon at the side any email can be viewed



brokervisionlive  
professional interactive claims management

- Remember everything is visible with full transparency, something which is exclusive to Broker Vision Live.
- That concludes the brief tour of what information Broker Vision Live can provide **YOU**, the broker, enabling you to answer **YOUR** clients queries with accurate and up to date information when they need it.
- Thank you for looking at Broker Vision Live – if you would like to arrange a personal demonstration and be able to use the **FREE** service please call

08000 434 999

and Public Loss Adjusters will make an appointment for one of their Broker Vision Live co-ordinators to make a presentation to you and initiate your access to the **FREE** service.