



ClaimWizard Email Archiving and SMS Updating

Document archiving is an integral part to the claim management process and ClaimWizard makes it easy to store emails with their respective claims.

SMS, or “text messaging”, provides a simple and convenient way of communication. ClaimWizard lets you update a claim’s activity log and upload photos using SMS.

This document will introduce you to ClaimWizard’s email archiving and SMS-related features. Email archiving and SMS updates both use the same basic approach as sending an email. If you are comfortable with how email works, you should find email archiving and SMS updates a breeze to use. The recipient is simply the claim where you want to store the message.

While the general use of these features is fairly straight-forward, there are a few important requirements to keep in mind. This document will also cover important aspects such as message moderation and review, security, and controls.

Getting Started

Emails are stored in the claim's activity log under a section labeled "Email Archive". Clicking on the Mail icon will display the emails that have been stored with the claim.



SMS messages are either stored in the claim's activity log or its file section, depending on the content found within the message. If the SMS is just text, it will be treated as an activity entry and stored in the activity log. If the SMS is a photo, it will be stored in the claims file section, in a folder labeled "Files Uploaded by SMS". If the SMS is both a photo and a text, the photo is stored in the file section and the text part becomes a description for that file. This allows you to annotate and upload photos right from the field.

Sending the Message

Every claim in ClaimWizard has a unique identifier called a "file ID". This file ID is generated by the system automatically when a new claim is entered. The file ID is used when addressing an email or text message. If you know the file ID of the claim that you want to send an email or text message to, then you simply need to set the TO address to that file ID @claimwizard.com. So, a claim with a file ID of 123456 would be addressed to 123456@claimwizard.com. You can also use the CC and BCC fields when addressing a claim.

When ClaimWizard receives an email, it looks for the address of the sender and matches it against its list of users. If a match is found, the email is routed to the company for that user. If the user is not found, the message is discarded. This is because there's no reliable way to determine where that email should go if the sender is not recognized. It is possible, however, for non-users to submit emails to a claim and we will cover this in a bit. For now, it is important to understand that a user's email addresses must be associated with the account. These can be managed from the user's account preferences or from their staff record.

Sending a message by SMS works similarly to email. The text message is addressed to the claim's email address (e.g. 123456@claimwizard.com). ClaimWizard will match the phone number that the message was sent from to a user's account. The submitter's phone number must be associated with the account. Again, these can be managed from the user's account preferences or from their staff record.

To summarize, ClaimWizard matches the email address or phone number of the sender to a user account. It is important that all email addresses and mobile phone numbers for a user be entered in their account information. Otherwise, the match cannot be made and the email or message will be discarded.

Messages from Outside Senders

Emails can be submitted to a claim from people that are not users of ClaimWizard. This allows your policyholders and vendors to forward emails to the system. However, it is not always desirable (and often risky) to allow outside parties to update your company's data without your prior approval. To provide your company with the ability to control what information is accepted, ClaimWizard provides a moderation tool that allows you to review a message before it becomes part of the claim's archive.

We'll cover how moderation works later in this guide but, first, let's look at how outside senders can address their messages.

Each company that has users registered in ClaimWizard has a company code assigned to it. This company code is used for features such as the Policyholder Portal. Email archiving and SMS updating also use the company code when matching a sender's email or phone number to its list of companies. For example, ABC Adjusters might have the company code "ABC".

Outside senders that are not ClaimWizard users simply need to append your company code to the file ID used to address the message. So, a claim with a file ID of 123456 for our company with the code "ABC" would be addressed as ABC-123456@claimwizard.com. Company codes are not case-sensitive so upper or lower-cased letters are fine.

When a message is received from an outside sender, it is held in a moderation queue for review. If the outside sender is replying to another email that has already been archived, the company code will not be necessary. ClaimWizard will match that email to the one previously sent and submit it for moderation. More on this shortly.

Messages from Users of Multiple Companies

It is not uncommon for a user to have multiple ClaimWizard accounts for multiple companies, all of which share the same email address. In this case, matching the email address alone to a company will not be sufficient since that email address could be associated with multiple companies. The solution in this case is to simply append the appropriate company code to the message's email. Just like addressing a message by an outside sender, a claim with a file ID of 123456 for our company with the code "ABC" would be addressed as ABC-123456@claimwizard.com.

If you forget the company code, you will receive an email reply that includes a list of companies that your email is associated with along with their company codes. Note that your account must be active with that company.

Staying in Control with Moderation

Just as you would not want just anyone to walk in off of the street and start editing your policyholder and claim information, you would not want to allow unauthorized senders to submit messages to a claim. To ensure that your company has the necessary ability to control who can archive what, ClaimWizard provides a moderation tool that allows you to make your own decisions.

An email message will be submitted for review for the following scenarios:

- The sender of the message is not an authorized user of your company. This requires that the address of the message be prefixed with your company code.
- The sender is authorized but the destination of the message cannot be determined. This is often due to spelling errors in the message's address.
- The sender is not an authorized user of your company but the message is in reply to one that has already been archived.
- The sender's email address has been flagged to always require review.
- Moderation review was requested by another user

Moderation is available to administrative staff and is located on the "Messages" panel in the Dashboard. There are two views available from the Messages panel: "Waiting Review" and "Received". The Waiting Review view will display a list of all messages that currently require moderation. The Received view will show a list of messages that have recently been assigned or routed to a destination, such as a claim.

When viewing the Waiting Review list, clicking on an item will display details for that message as well as its contents. Options are available to **Assign** the message to a destination, **Approve** an assignment if the system has already identified where the message should be archived, or **Reject** the message, which will remove it from the system.

Each item in the list is displayed with the name or email of the sender, the date that it was received, the message's subject, and the reason the email was flagged for review.



Important: Emails held for moderation expire after 90 days and will be removed.

Blacklists and Whitelists

ClaimWizard provides two additional tools to help you maintain control over who can or cannot submit messages.

Blacklists prevent the sender from submitting messages to the system, regardless of reason. This is useful for combatting spammers and other bad actors.

Whitelists enable you to authorize non-company senders to submit messages to your company's files. Senders that are on the whitelist must use your company's code when submitting a message. Without it, the destination cannot be determined and the message will be rejected.

Senders on the whitelist can also be further distinguished as either "trusted" or "not trusted". A trusted sender can submit messages directly to a destination without requiring moderation. This is often useful when receiving messages from an external billing system or documentation service, as well as a service partner like an attorney. Messages sent by a sender that is not trusted will be flagged for moderation by your administrative staff.

The blacklist and whitelist can be maintained from within the Admin section under "Messaging Options".