

# Claims Access at AmTrust *Online* – Associate View Level

By logging onto AmTrust *Online* you can access a wide variety of useful claims information.



**Leading Writer**  
of Workers' Compensation  
insurance in the U.S.



**Real-time Access**  
to claims data and reports



**Online Claims  
Reporting**  
for workers' comp with  
immediate claim number  
assignment

## To log in

Visit [www.amtrustfinancial.com](http://www.amtrustfinancial.com), click on Login and sign in using your established credentials.

## After logging in, access the menu of claims view options

### Insureds:

Click on the "View Claims" icon in the right-hand side of your screen. This will bring up a menu of options in the upper left side of the screen.

### Agents:

Enter the policy number in the search box in the upper left of the screen to view claims information. The search will bring up two menu options: Insured Reports and Producer Reports. Use the Insured Reports menu to view claims information for the policyholder that you entered into the initial search box. To view combined claims information for all policies registered to your agency with AmTrust, use the Producer Reports menu.

## Menu options for available claims information and reports

The menu offers a variety of options, including:

- **View individual claims:** Click on "Claim Search." Enter the claimant's information and click on "Search."
  - **Note:** When entering a claim number in search, do not include the sequence number (i.e., "-1"); only enter the base claim number. The applicable claim will appear at the bottom of your screen with the following information: claim number, claimant name, loss date, open-close status, policy number and incurred dollar value. Click on the "View" icon to see the claim financial summary screen to see options for a plan of action, payment and reserve transactions and non-private adjuster notes.
- **Search for recent losses:** Click on "Recent Losses." This will list all claims set up on your account within the last 60 days. Click on the "View" icon next to a claim to see claim financial information, including options for the claim, a plan of action, checks issued, reserve transactions and notes.
- **Loss run:** Click on either "CPP Loss Run Report" for non-Workers' Compensation (WC) policies or "WC Loss Run Report" for Workers' Comp policies. Choose the various sort options (i.e., open/closed, \$\$ threshold and grouping/sorting). For reporting, click "Generate" to create a PDF report or "Export to Excel" to download in Excel.
- **Loss summary report:** This is a snapshot of total claims counts and claims financials by policy. Click on "Loss Summary Report," choose your Group By and Sort By options, and run as a PDF or Excel.

- **Incurred changes summary report:** This is a list of incurred changes on claims. Click on “Incurred Changes Summary,” then enter the period of time for the changes and scroll down to download the report as a PDF or in Excel.
  - **Note:** No sorting options are available on the PDF version of this report.
- **Loss charts and analysis (loss stratification by category):** Click on “CPP” or “WC Loss Charts and Analysis.” To get a PDF report or download into Excel, click on “Generate.”
- **WC loss summary by location report:** This will work only on insureds that are PEOs. It will display a one-line loss and claims financial summary for each PEO client location on the policy.
- **Recovery transactions report:** This is a list of claims with any type of recovery. Click on “Recovery Transactions Report” and then enter the period of time for the transaction. Click on “Generate” to download the report in a PDF or Excel format.
  - **Note:** No sorting options are available on the PDF version of this report.

## To report a new claim (Insureds only)

After logging in, click “View” next to the policy for which you wish to enter a claim to bring up the policy detail screen. Then:

1. Click on “First Reports” in the upper-left corner.
2. Click on “Add” to take you to the “New First Report of Injury” screen.
3. Click on “Use Web Form” to enter all the detailed information about the injury/injured worker.

## Helpful hints when entering a new claim online

- Time Employee Began Work and Time of Occurrence must be entered in military time. Enter the hours in the first box and the minutes in the second box.
- All dates must be entered as two-digit day, two-digit month and four-digit year, (i.e., xx/xx/xxxx)
- For PEOs, in the “Location Address” box, please include the PEO client name and the address of the applicable PEO client location. If there is a location code/number, specify it in the “Location #” box.
- If during the entry of a claim you must exit the application, click on “Save as Draft.” You may return to it later by going back into “First Reports” and clicking on “In Progress.”

After entering all of the data, click on “Submit.” The report will channel into our intake center to be set up and assigned to a claims adjuster. The “First Reports Screen” will list the claims number for the report just entered. To finish, click on “Return to Listing.”