

Ando Gradient Portal

Managing a claim

gradient.ando.co.nz



Contents

- > Understanding the statuses of a claim.
- > Viewing more information on a claim.
- > Send a message on the portal.
- > What the different tabs are for.
- > Assigning the Broker Owner.

Managing a claim on the portal

- > Once you've lodged a claim on the portal, you will be able to view notes, documentation, and general updates on the claim in real time.
- > The next few slides will show you how to access a claim and navigate your way around to review progress.

Understanding statuses of a claim

At a glance, you can see both the **'Acceptance Status'** as well as the **overall claim 'Status'** of each claim on the home screen. To see further details, you can click on a specific claim.

Status
Open Claims

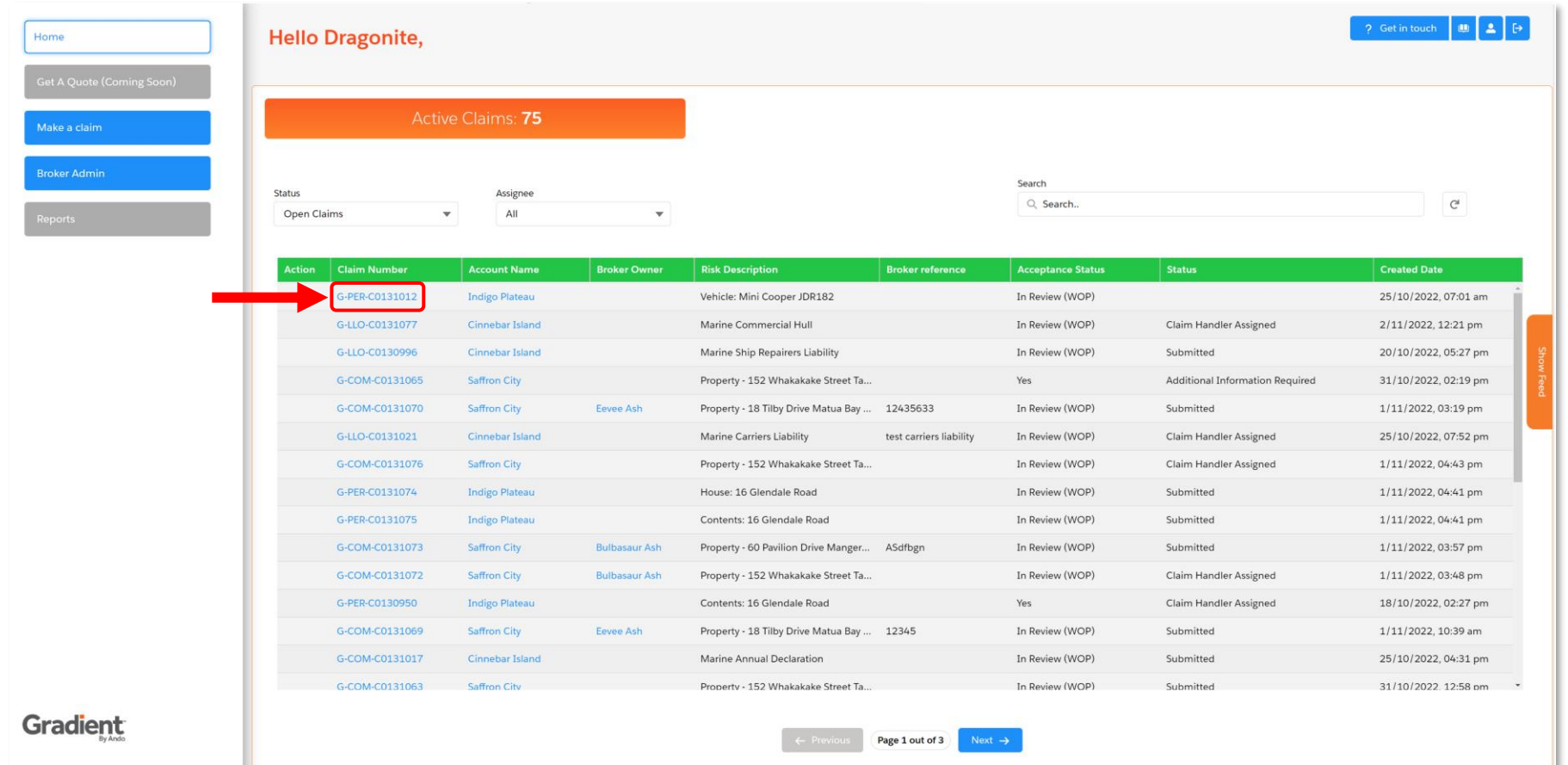
Assignee
All

Search
Search..

Action	Claim Number	Account Name	Broker Owner	Risk Description	Broker reference	Acceptance Status	Status	Created Date ↓
	G-LLO-C0131077	Cinnebar Island		Marine Commercial Hull		In Review (WOP)	Claim Handler Assigned	2/11/2022, 12:21 pm
	G-COM-C0131076	Saffron City		Property - 152 Whakakak...		In Review (WOP)	Claim Handler Assigned	1/11/2022, 04:43 pm
	G-PER-C0131075	Indigo Plateau		Contents: 16 Glendale Ro...		In Review (WOP)	Submitted	1/11/2022, 04:41 pm
	G-PER-C0131074	Indigo Plateau		House: 16 Glendale Road		In Review (WOP)	Submitted	1/11/2022, 04:41 pm
	G-COM-C0131073	Saffron City	Bulbasaur Ash	Property - 60 Pavilion Driv...	ASdfbgn	In Review (WOP)	Submitted	1/11/2022, 03:57 pm
	G-COM-C0131072	Saffron City	Bulbasaur Ash	Property - 152 Whakakak...		In Review (WOP)	Claim Handler Assigned	1/11/2022, 03:48 pm
	G-COM-C0131070	Saffron City	Eevee Ash	Property - 18 Tilby Drive ...	12435633	In Review (WOP)	Submitted	1/11/2022, 03:19 pm
	G-COM-C0131069	Saffron City	Eevee Ash	Property - 18 Tilby Drive ...	12345	In Review (WOP)	Submitted	1/11/2022, 10:39 am
	G-COM-C0131065	Saffron City		Property - 152 Whakakak...		Yes	Additional Information Required	31/10/2022, 02:19 pm
	G-COM-C0131063	Saffron City		Property - 152 Whakakak...		In Review (WOP)	Submitted	31/10/2022, 12:58 pm
i	G-COM-C0131061	Saffron City		Property - 152 Whakakak...		In Review (WOP)	Claim Handler Assigned	31/10/2022, 12:40 pm

Viewing more information on a claim

To access a claim and view more information on a claim, simply click on the claim number.



The screenshot shows the Dragonite claims management interface. On the left is a sidebar with navigation links: Home, Get A Quote (Coming Soon), Make a claim, Broker Admin, and Reports. The main header says "Hello Dragonite," and includes a "Get in touch" button. Below the header, a summary bar shows "Active Claims: 75". There are filters for Status (Open Claims) and Assignee (All), and a search bar. The main content is a table of claims with columns: Action, Claim Number, Account Name, Broker Owner, Risk Description, Broker reference, Acceptance Status, Status, and Created Date. A red arrow points to the claim number "G-PER-C0131012" in the first row of the table. The table lists various claims with details like account names (Indigo Plateau, Cinnebar Island, Saffron City), broker owners (Eevee Ash, Bulbasaur Ash), risk descriptions, and dates.

Action	Claim Number	Account Name	Broker Owner	Risk Description	Broker reference	Acceptance Status	Status	Created Date
	G-PER-C0131012	Indigo Plateau		Vehicle: Mini Cooper JDR182		In Review (WOP)		25/10/2022, 07:01 am
	G-LLO-C0131077	Cinnebar Island		Marine Commercial Hull		In Review (WOP)	Claim Handler Assigned	2/11/2022, 12:21 pm
	G-LLO-C0130996	Cinnebar Island		Marine Ship Repairers Liability		In Review (WOP)	Submitted	20/10/2022, 05:27 pm
	G-COM-C0131065	Saffron City		Property - 152 Whakakake Street Ta...		Yes	Additional Information Required	31/10/2022, 02:19 pm
	G-COM-C0131070	Saffron City	Eevee Ash	Property - 18 Tilby Drive Matua Bay ...	12435633	In Review (WOP)	Submitted	1/11/2022, 03:19 pm
	G-LLO-C0131021	Cinnebar Island		Marine Carriers Liability	test carriers liability	In Review (WOP)	Claim Handler Assigned	25/10/2022, 07:52 pm
	G-COM-C0131076	Saffron City		Property - 152 Whakakake Street Ta...		In Review (WOP)	Claim Handler Assigned	1/11/2022, 04:43 pm
	G-PER-C0131074	Indigo Plateau		House: 16 Glendale Road		In Review (WOP)	Submitted	1/11/2022, 04:41 pm
	G-PER-C0131075	Indigo Plateau		Contents: 16 Glendale Road		In Review (WOP)	Submitted	1/11/2022, 04:41 pm
	G-COM-C0131073	Saffron City	Bulbasaur Ash	Property - 60 Pavilion Drive Manger...	ASdfbgn	In Review (WOP)	Submitted	1/11/2022, 03:57 pm
	G-COM-C0131072	Saffron City	Bulbasaur Ash	Property - 152 Whakakake Street Ta...		In Review (WOP)	Claim Handler Assigned	1/11/2022, 03:48 pm
	G-PER-C0130950	Indigo Plateau		Contents: 16 Glendale Road		Yes	Claim Handler Assigned	18/10/2022, 02:27 pm
	G-COM-C0131069	Saffron City	Eevee Ash	Property - 18 Tilby Drive Matua Bay ...	12345	In Review (WOP)	Submitted	1/11/2022, 10:39 am
	G-COM-C0131017	Cinnebar Island		Marine Annual Declaration		In Review (WOP)	Submitted	25/10/2022, 04:31 pm
	G-COM-C0131063	Saffron City		Property - 152 Whakakake Street Ta...		In Review (WOP)	Submitted	31/10/2022, 12:58 pm

Viewing more information on a claim

The **'Status'** field shows what we're currently doing or waiting on for the claim.

The **'Acceptance Status'** field shows whether the claim has been accepted, or not.

The **'Excess'** and **'Excess Details'** fields shows the excess amount that has been applied to the claim, and how this was calculated.

Click on any of the tabs to access other information about the claim.

Home

Get A Quote (Coming Soon)

Make a claim

Broker Admin

Reports

Hello Eevee,

Claim
G-PER-C0133087

Account
Indigo Plateau

Policy Number
PER-P0095234

Risk Description
Contents: 16 Glendale Road

When did the incident occur?
2/02/2022, 9:29 am

Owner
rachel allsopp

Brokerage.
Pokemon Agency

+ Follow

Assign Broker Owner

Download Zip File

✓

✓

✓

In Progress

Fulfilment

Recovery

Closed

Claim Headlines

StatusAdditional Information Required

Acceptance StatusYes

Resolution PathwayIn Progress

Excess\$ 250.00

Excess DetailSTD

Broker OwnerEevee Ash

Paid to Date\$ 260.87

Outstanding Reserve\$ 1,039.13

Total Claim Incurred\$ 1,300.00

NOTESMESSAGESHISTORYDETAILSDOCUMENTSCLAIM ITEMSCLAIM PARTICIPANTSPAYMENTSCASESTEST

Notes

TitleText PreviewCreated ByCreated On ↑

View

First Day Actions

Bank account on Claim Form: Y Limits/exclusion to apply: (e.g. HGD) NA Action Taken: FDA sen...

rachel allsopp

30/10/2023, 09:45 am

Gradient

By Ando

The **Status Bar** shows what stage the claim is at.
(See next page for the descriptions of each stage.)

These fields provide detailed information about payments made or due to be made on the claim.

Page 6

Understanding the stages and statuses of a claim

The home screen view provides immediate visibility of where the claim is currently at – the claim stages and statuses should have enough information to help reduce the request for claim updates from the Ando Claims team.

The following stages are used on the portal:

Stage	What it means
Draft	A claim has been drafted by lodgement is not completed.
New	A new claim has been lodged and needs to be assigned or reviewed by the Ando Claim Handler.
Triage	First day actions are being completed.
In progress	The claim is progressing to determine cover and settlement approach.
Fulfilment	Settlement has been agreed and the customer is being reinstated.
Recovery	All claim actions are completed and has now been referred to Recoveries.
Closed	The claim has been withdrawn, completed, or declined.

Send a message on the portal

The **'Messages'** tab allows you to contact your Ando Claims Handler if you have any questions, or if there is any further detail you'd like to provide.

To send a message, enter a short summary in the 'Subject' line, then add further information in the 'Details' section.

Click **'Send'** when you're ready to submit the message.

Claim
G-PER-C0130944

[+ Follow](#) [Assign Broker Owner](#)

Account Indigo Plateau	Policy Number PER-P0095234	Primary Vehicle JDR182	When did the incident occur? 13/12/2021, 10:17 am	Owner Motor Allocation	Brokerage Pokemon Agency
-------------------------------------------	-----------------------------------------------	---------------------------	------------------------------------------------------	---------------------------	---------------------------------------------

✓

✓

✓

✓

Fulfilment

Recovery

Closed

Claim Headlines

Status	Repairs Authorised	Broker Owner	Dragonite Ash
Acceptance Status	Yes	Paid to Date	\$ 194.00
Resolution Pathway	Fulfilment	Outstanding Reserve	\$ 5,204.94
Excess	\$ 500.00	Total Claim Incurred	\$ 5,398.94
Excess Detail	STD	No Claim Bonus impacted?	Bonus Impacted

NOTES **MESSAGES** HISTORY DETAILS DOCUMENTS CLAIM ITEMS CLAIM PARTICIPANTS PAYMENTS CASES

* Subject (Enter up to 255 characters)

What can we help with?

Details

If you have more to say, add details here...

Salesforce Sans 12 B I U

To: this claim


Send

History tab

The **'History'** tab allows you to view a series of key updates on the claim, and when they've occurred.

This tab shows the last four transactions as the default view.

Click '**View All**' if you want to review further back.



Claim
G-PER-C0133087

[+ Follow](#)
[Assign Broker Owner](#)
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Account
[Indigo Plateau](#)

Policy Number
[PER-P0095234](#)

Risk Description
Contents: 16 Glendale Road

When did the incident occur?
2/02/2022, 9:29 am

Owner
rachel allsopp

Brokerage.
Pokemon Agency

✓

✓

✓

In Progress

Fulfilment

Recovery

Closed

Claim Headlines

Status	Additional Information Required	Broker Owner	Eevee Ash
Acceptance Status	Yes	Paid to Date	\$ 260.87
Resolution Pathway	In Progress	Outstanding Reserve	\$ 1,039.13
Excess	\$ 250.00	Total Claim Incurred	\$ 1,300.00
Excess Detail	STD		

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TEST


Claim History (28)

Date	Field	User	Original Value	New Value
30/10/2023, 9:48 am	Current Total Reserve Amount	Platform Integration User	1300	1039.13
30/10/2023, 9:46 am	Current Total Reserve Amount	rachel allsopp		1300
30/10/2023, 9:46 am	Claim accepted?	rachel allsopp		Yes
30/10/2023, 9:46 am	Status	rachel allsopp	Claim Handler Assigned	Additional Information Required

[View All](#)

Details tab

The **'Details'** tab allows you to review the details of the claim form you submitted.



Claim

G-PER-C0133087

+ Follow

Assign Broker Owner

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Account

Indigo Plateau

Policy Number

PER-P0095234

Risk Description

Contents: 16 Glendale Road

When did the incident occur?

2/02/2022, 9:29 am

Owner

rachel allsopp

Brokerage

Pokemon Agency

✓

✓

✓

In Progress

Fulfilment

Recovery

Closed

Claim Headlines

Status

Additional Information Required

Broker Owner

Eevee Ash

Acceptance Status

Yes

Paid to Date

\$ 260.87

Resolution Pathway

In Progress

Outstanding Reserve

\$ 1,039.13

Excess

\$ 250.00

Total Claim Incurred

\$ 1,300.00

Excess Detail

STD

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▼ Incident Details

When did the incident occur?

2/02/2022, 9:29 am

Client Name

Indigo Plateau

Please describe what happened?

Lost phone

Incident Site

16 Glendale Road
Auckland 0602

Which best describes what happened?

Lost/Disappeared

Was the incident caused by?

1

Has anyone admitted Responsibility?

1

Documents tab & uploading more information

The **‘Documents’** tab allows you to view any documents that you have access to.

You can also upload any additional documentation that you want to send to the Ando Claims Handler by clicking on the **‘New’** button on the right-hand side of the documents tab.

Once you have uploaded a new document the Claims Handler will be notified.

Claim
G-PER-C0133087

+ Follow

Assign Broker Owner

Download Zip File

Account
[Indigo Plateau](#)

Policy Number
[PER-P0095234](#)

Risk Description
Contents: 16 Glendale Road

When did the incident occur?
2/02/2022, 9:29 am

Owner
rachel allsopp

Brokerage
Pokemon Agency

✓

✓

✓

In Progress

Fulfilment

Recovery

Closed

Claim Headlines

Status

Additional Information Required

Broker Owner

[Eevee Ash](#)

Acceptance Status

Yes

Paid to Date

\$ 260.87

Resolution Pathway

In Progress

Outstanding Reserve

\$ 1,039.13

Excess

\$ 250.00

Total Claim Incurred

\$ 1,300.00

Excess Detail

STD

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All Attachments (1)

New

Name

Claim Number

Category

Document Type

Uploaded Date

[Contents claim form IndigoPlateau.pdf](#)

G-PER-C0133087

Claim Correspondence

General

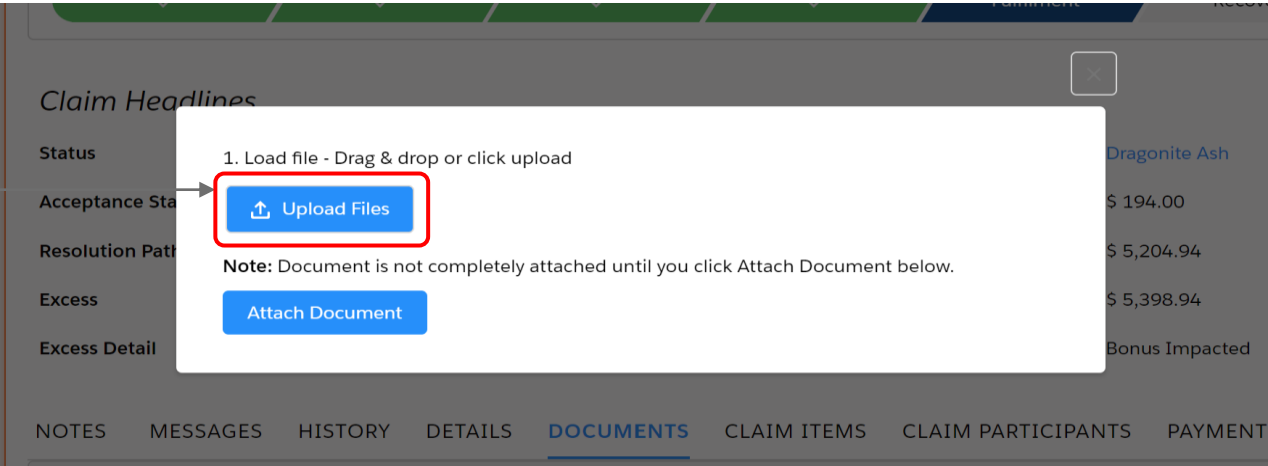
30/10/2023, 9:38 am

View All



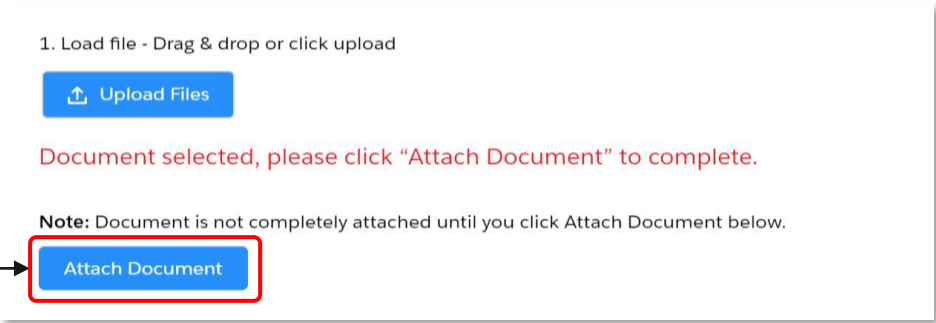
Documents tab & uploading more information

Once you've clicked 'New', you can either click the 'Upload Files' button to browse for a file from your device, or simply drag and drop a file onto this button.



After you've selected the file and uploaded, you'll receive a confirmation message.

Please select 'Attach Document' to finish the upload process. The Ando Claims Handler will then be notified that the document has been received.



Claims item tab

The **'Claim Items'** tab allows you to view details of the item(s) being claimed against.

This will vary depending on the policy.

- > For a motor policy, it will be the vehicle;
- > For a contents policy, it will be the items that have been lost or damaged.

Claim
G-PER-C0133087

[+ Follow](#) [Assign Broker Owner](#) [Download Zip File](#)

Account
[Indigo Plateau](#)

Policy Number
[PER-P0095234](#)

Risk Description
Contents: 16 Glendale Road

When did the incident occur?
2/02/2022, 9:29 am

Owner
rachel allsopp

Brokerage.
Pokemon Agency

✓

✓

✓

In Progress

Fulfilment

Recovery

Closed

Claim Headlines

Status	Additional Information Required	Broker Owner	Eevee Ash
Acceptance Status	Yes	Paid to Date	\$ 260.87
Resolution Pathway	In Progress	Outstanding Reserve	\$ 1,039.13
Excess	\$ 250.00	Total Claim Incurred	\$ 1,300.00
Excess Detail	STD		

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Claim Items (1)

Name	Type	Value	Age	Purchased From
iPhone 13	Phone	\$ 1,300.00	7 to 12 months	Noel Leeming

[View All](#)

Claim participants tab

The 'Claim participants' tab allows you to view details of the parties involved in the claim.

This includes you as the broker, any witnesses, as well as other third parties or third-party insurers.

Claim
G-PER-C0133087

[+ Follow](#)[Assign Broker Owner](#)[Download Zip File](#)

Account
[Indigo Plateau](#)

Policy Number
[PER-P0095234](#)

Risk Description
Contents: 16 Glendale Road

When did the incident occur?
2/02/2022, 9:29 am

Owner
rachel.allsopp

Brokerage
Pokemon Agency

✓

✓

✓

In Progress

Fulfilment

Recovery

Closed

Claim Headlines

Status

Additional Information Required

Broker Owner

[Eevee Ash](#)

Acceptance Status

Yes

Paid to Date

\$ 260.87

Resolution Pathway

In Progress

Outstanding Reserve

\$ 1,039.13

Excess

\$ 250.00

Total Claim Incurred

\$ 1,300.00

Excess Detail

STD

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CLAIM PARTICIPANTS

PAYMENTS

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Claim participants (2)

First Name	Last Name	Role	Mobile	Email	Is this party at fault?	Insurance Details
Eevee	Ash	Main Contact		rachel.allsopp@ando.co.nz	<input type="checkbox"/>	
Indigo	Plateau	Notifier	99999999	ryan.ahn@ando.co.nz.invalid	<input type="checkbox"/>	

[View All](#)

Payments tab

The **'Payments'** tab allows you to view details of the payments that have been made on the claim to date.

 Claim
G-PER-C0133087


[+ Follow](#)
[Assign Broker Owner](#)
[Download Zip File](#)

Account Indigo Plateau	Policy Number PER-P0095234	Risk Description Contents: 16 Glendale Road	When did the incident occur? 2/02/2022, 9:29 am	Owner rachel allsopp	Brokerage, Pokemon Agency
-------------------------------------------	-----------------------------------------------	------------------------------------------------	----------------------------------------------------	-------------------------	------------------------------


✓✓✓In ProgressFulfilmentRecoveryClosed

Claim Headlines

Status	Additional Information Required	Broker Owner	Evee Ash
Acceptance Status	Yes	Paid to Date	\$ 260.87
Resolution Pathway	In Progress	Outstanding Reserve	\$ 1,039.13
Excess	\$ 250.00	Total Claim Incurred	\$ 1,300.00
Excess Detail	STD		



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 **Payments (1)**

Payee Name	Payment amount	Transaction Date
Harvey Norman Stores (NZ) Pty Ltd	\$ 300.00	29/10/2023

[View All](#)

Assigning Broker Owner

If you'd like to assign or change the owner of a claim, you can do this by clicking on **'Assign Broker Owner'**.

By default, you have access to view all claims for your branch, as well as claims for branches you have been granted access to.

You can also filter this to only see the claims that you are assigned as the **'Broker Owner'**.

Claim
G-PER-C0133087

[+ Follow](#) [Assign Broker Owner](#) [Download Zip File](#)

Account
Indigo Plateau

Policy Number
PER-P0095234

Risk Description
Contents: 16 Glendale Road

When did the incident occur?
2/02/2022, 9:29 am

Owner
rachel allsopp

Brokerage.
Pokemon Agency

✓

✓

✓

In Progress

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Claim Headlines

Status

Additional Information Required

Broker Owner
Eevee Ash

Acceptance Status

Yes

Paid to Date
\$ 260.87

Resolution Pathway

In Progress

Outstanding Reserve
\$ 1,039.13

You can then select an owner from your branch in the dropdown list, and then click **'Next'**.

Assign Broker Owner

Please select an owner.

Owner

Dragonite Ash

Next

