

Climate Shield Complete Web Portal Overview for Claims



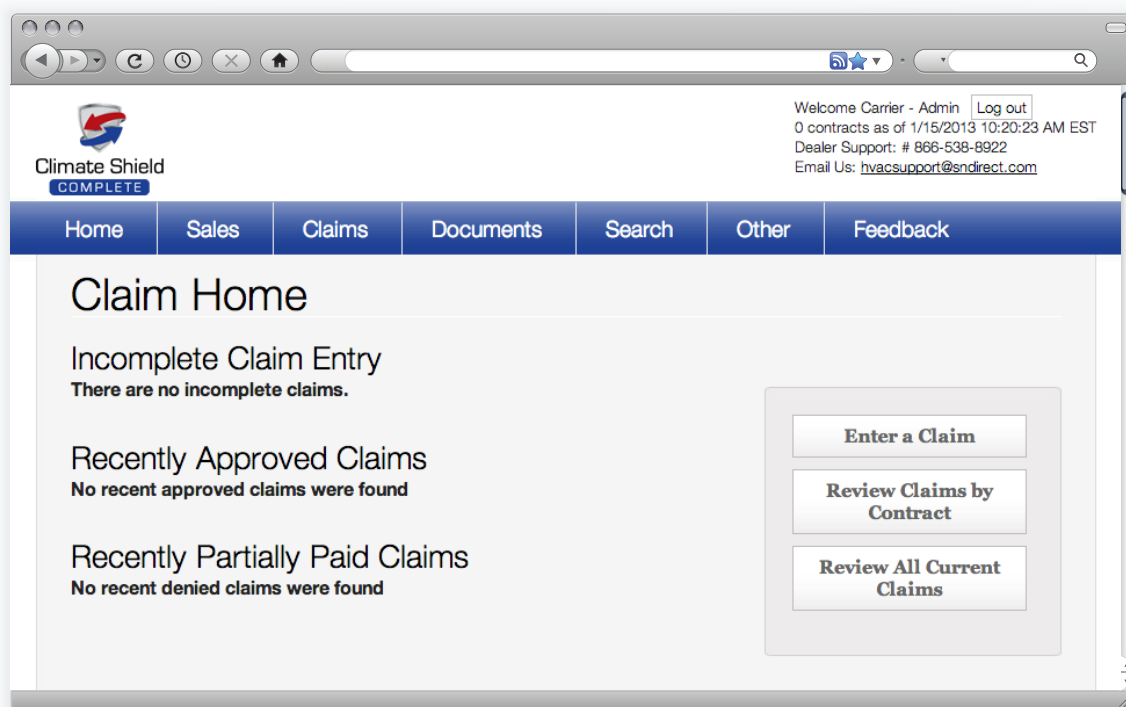
Climate Shield

COMPLETE

Claims

To get to this page simply click “Claims” listed in the menu of options across the top of the page. This page will provide you important details on claims that have been entered or cancelled.

Claim Home Page Features



1. Incomplete Claims Entries

Displays claims that you began entering, but didn't completely create.

2. Recently Approved Claims

Recently approved claims are listed on the Claim Home page for your convenience. Click on any of the claim numbers to obtain details related to that claim.

3. Recently Partially Paid or Denied Claims

4. Navigation Buttons

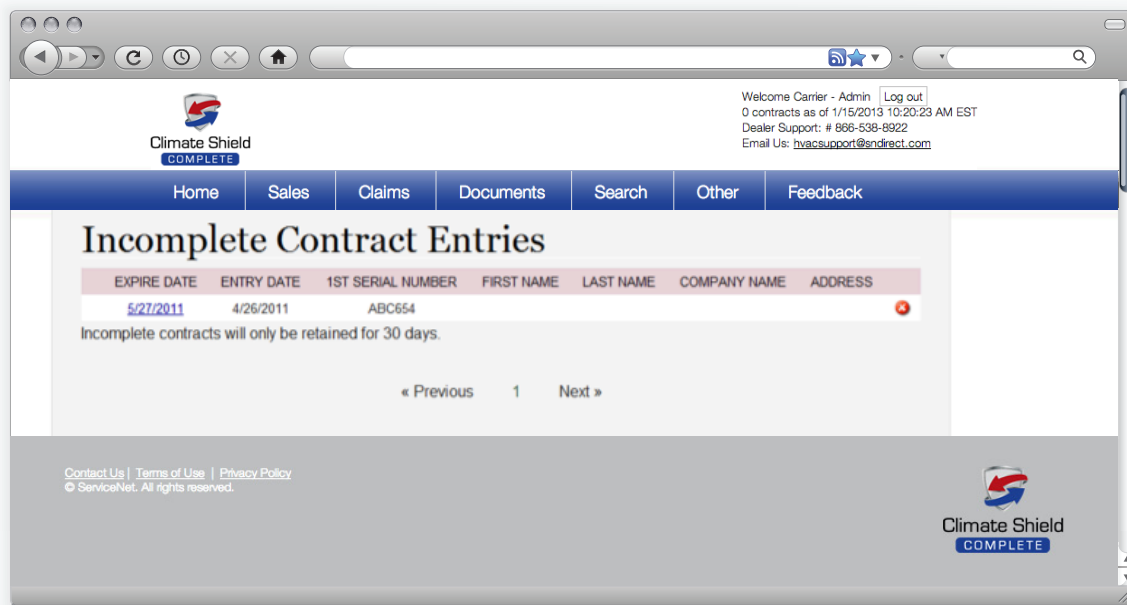
For your convenience you can Enter a Claim, Review Claims by Contract or Review All Current Claims.

Screen shots on the following pages will provide additional details on these claim features.

Claims – Incomplete Claims

This section displays all claims that you started to enter, but did not complete. The portal allows you to save your incomplete claims entries provided that you enter and save certain information.

Incomplete Claim Entries



1. To Complete Claim Entry

Click the date (highlighted in blue). Incomplete claim entries will only be retained for thirty (30) days. After 30 days the incomplete entry will be deleted and removed from the website. You will still be able to submit the claim, but you will be required to key all of the contract information again. A claim must be submitted within sixty (60) days from the date of service.

2. To Delete Incomplete Entry

Click the red "X" if you need to delete an incomplete contract entry from the list.

Claims – Enter a Claim Step 1 of 4

This section will guide you through the process of submitting an electronic claim. There are paper forms that can be submitted. **Please note, processing claims electronically will lead to faster payment times.**

Enter a Claim

Search

Last Name

Address

Zip City

State

Phone Number

Email

Contract Number

Dealer PO #

Serial

1. Search for a Contract

Click on the Search Menu option. Enter contract information and click “Search”. You will be sent to a Review Page.

2. Review Page

This page allows you to view contract details. There are five buttons conveniently located at the bottom of this page to help you easily navigate through the website.

4. Create Claim

Select the product you wish to set up a claim on by selecting the button next to the serial number. Then click the “Create Claim” button. You will be taken to the page where you are able to submit a claim for service completed.

Review

joe smith

Installation Site
650 Missouri Avenue
Jeffersonville, IA 47130

Mailing Address
650 Missouri Avenue
Jeffersonville, IA 47130
8122584717
rchabot@servicenet.com

Contract Number: 37312456

Contract Status: Active

Coverage Description: 10 year Parts Only Climate Shield Complete US Plan 1 COMM A/C COMPRESSOR less than or equal 5 TON (366th Day Start)

Date of Installation: 10/15/2012

Expiration Date: 10/13/2022

Total Equipment Retail: 3,434.00

Submitted By: ICP

Dealer PO #: smith 37312456

****ONLY THE PRODUCTS LISTED BELOW ARE COVERED****
Control product including programmable thermostats must be listed below to be covered.

SERIAL	MODEL	DESCRIPTION	BRAND	MFG PARTS WARRANTY
<input type="radio"/> 3434	434	Heat Pump	Carrier	5 Years

Screen shots on the following pages will provide additional details on these claim features.

Claims – Enter a Claim Step 2 of 4

The claim entry is a simple two-page process. As we already know the customer's information, you can just simply submit the claims details.

Claim Entry Process

The screenshot shows a web browser window displaying the 'Submit Claim' form for Climate Shield. The form is titled 'Submit Claim' in red. It includes a navigation bar with links: Home, Sales, Claims, Documents, Search, Other, and Feedback. The form fields are as follows:

- * Invoice Date:** 9/17/2010
- * Invoice Submitted By:** NKramer
- * Dealer Invoice #:** (empty text box)
- * Date of Failure:** (calendar icon)
- * Date of Service:** (calendar icon) with a checkbox labeled 'Check if the same'.
- Date of Annual Maintenance:** (calendar icon) with a link: 'Click here to submit an Annual Maintenance Report'.
- * Problem / Complaint:** (text area with a character count: 'Maximum 100 Characters 100 Characters Remaining')
- Servicing Tech:** (text box)

The top right of the page shows user information: 'Welcome Carrier - Admin', 'Log out', '0 contracts as of 1/15/2013 10:20:23 AM EST', 'Dealer Support: # 888-538-8922', and 'Email Us: hvacsupport@endirect.com'.

1. Invoice Date

Invoice Date will always be stamped with “today’s” date.

2. Invoice Submitted By

This allows you to identify who at your dealership submitted the details, so we may call with questions.

3. Dealer Invoice Number

Add a Invoice number you wish to track this invoice by. We will also use this invoice number on the check that is sent for payment.

4. Date of Failure

The date the customer's unit failed.

5. Date of Service

The date the servicing tech repaired the unit.

6. Date of Annual Maintenance

Indicate the last time maintenance was performed on the unit. This does not need to be filled out to submit the claim.

7. Problem/Complaint

This section should be filled out to let us know what the issue was with the unit or the customer's concern with the unit.

8. Servicing Tech

Indicate the tech that repaired the unit. This is simply for your tracking purposes, if questions come up with the repair.

9. Lower Section of the Claims Form

This section is to specify the details of that claim. Items will appear in this section depending on the type of contract purchased. For example, if you purchased a Parts and Labor contract, you will have a Parts Out of Warranty section, where if you have a Labor Only contract, you will only see the applicable Labor sections. Rates have been preset depending on the Plan you have purchased. Please reference the Program Guide for specifics on the payments received by Plan for additional details.

Screen shots on the following pages will provide additional details on these claim features.

Claims – Enter a Claim Step 3 of 4

Continue to fill out information regarding the claim.

Claim Entry Process

Repair Code Selection

Select Repairs Performed

REPAIR CODE	REPAIR	AMOUNT ALLOWED BY PLAN	% APPLIED	TOTAL FOR REIMBURSEMENT
There were no selected repairs found. There is no data to show.				

Repair Code Selection

Finished

Repairs marked with "NC" are NOT covered.

Accumulator	Blower Motor & Wheel	Boilers
Breakers	Burner	Capacitor (only repair)
Circuit Board	Compressor	Condenser Coil
Condenser Fan	Contact	Defrost
Drier	Electric Heat	Electronic Air Cleaner
Evaporator (coil leak)	Fan & Limits	Fan Belt
Filters	Flue	Gas Valve
Heat Exchanger	Humidifier	Ignition
Inducer	Low Voltage	Metering Device
Miscellaneous	Oil Furnace	Pressure Switch (refrigeration)
Reversing Valve	Thermostat	Ultraviolet
Water Leak	Wiring	

Repair Code Selection

Finished

Repairs marked with "NC" are NOT covered.

Accumulator	Blower Motor & Wheel	Boilers
Breakers	Burner	Capacitor (only repair)
Circuit Board	Compressor	Condenser Coil
Condenser Fan	Contact	Defrost

Repair Code Selection

Select Repairs Performed

REPAIR CODE	REPAIR	AMOUNT ALLOWED BY PLAN	% APPLIED	TOTAL FOR REIMBURSEMENT
E	Replace Compressor	385.00	100%	385.00
D	Replace Drain Pan	245.00	75%	183.75
C	Replace Burner	157.50	50%	78.75
B	Replace Condenser Motor	122.50	50%	61.25
	Replace Condenser Fan Blade and Motor			
A	Replace Crankcase Heater (if factory supplied)	78.75	50%	39.38
	Repair Terminal			
SubTotal				748.12
Total Tax \$				0
Total				748.12

Service Call

TRIP/DIAGNOSIS RATE

TOTAL TAX \$

TOTAL

40.00

0.00

40.00

Service Call

TRIP/DIAGNOSIS RATE

TOTAL TAX \$

TOTAL

40.00

0.00

40.00

Considerations

Maximum 250 Characters 250 Characters Remaining

clear / cancel

save for later

next

10. Repair Code Entry

To enter Repair Codes, click on “Select Repairs Performed” button. Upon clicking the button, a series of buttons drops down.

11. Click on a Drop Down

It will expose the items assigned to that category.

12. Select the Repairs Performed

Select the repairs that were performed on the unit. Please note, the letters in front of the repair description indicate the Repair Code Category.

This is an example of a repair submitted. The combination of repairs performed is not logical, but was used to show how the reimbursements are applied. The system will automatically calculate the total amounts that can be submitted for reimbursement. The highest repair code selected is reimbursed at 100% and then drops as each additional Repair code is selected.

Please fill in the Total Tax \$, with the applicable state/local tax. For our Canadian dealers, we will display Total Tax for (PST, GST, QST, and HST). Tax will be added to your total for the Labor section.

13. Click Finished

14. Submit Service Call

If you wish to submit for a service call, you simply need to click the green “+”. If you need to add applicable tax, that is available for entry. Simply add the tax prior to clicking the green “+”.

15. Considerations

The considerations box is for you to provide any additional details that the claims adjudication team may need to process your claim. This information will be stored with the claim for processing.

16. To Continue

Click “Next” if you wish to submit your sale. Click “Save” if you wish to return to complete the purchase at a later point in time.

Claims – Enter a Claim Step 4 of 4

Reviewing the claim information you entered is the last step in filing a claim.

Review Claim Entry

Review Claim

Please ensure invoice entries are complete and accurate as changes cannot be made once the invoice is submitted. If your service information has changed please update your dealer/service information.

Contract 22149577

Service Information
Nordyne - Admin Dealer
123 Main St
NALL, O' Fallon, MO 63366
Phone: 6365617300

Customer Information
Nicole Kramer
650 Missouri Ave
Jeffersonton, KY 40299

Servicing Tech: Nicole

Claim Details
Invoice Date: 9/17/2010
Dealer Invoice #: 123456
Date of Failure: 9/17/2010
Date of Annual Maintenance:

Invoice Submitted By: NKramer
Date of Service: 9/17/2010
Claim Number:

Problem / Complaint
test this unit

Billable Item Summary

Repair Code Selection

REPAIR CODE	REPAIR	AMOUNT ALLOWED BY PLAN	% APPLIED	TOTAL
E	Replace Compressor	385.00	100%	385.00
D	Replace Drain Pan	245.00	75%	183.75
C	Replace Burner	157.50	50%	78.75
B	Replace Condenser Motor	122.50	50%	61.25
	Replace Condenser Fan Blade and Motor			
A	Replace Crankcase Heater (if factory supplied)	78.75	50%	39.38
	Repair Terminal			
		Total Tax \$		788.12

Trip/Diagnosis Charge

TRIP/DIAGNOSIS RATE	TOTAL TAX \$	TOTAL
40.00	0.00	40.00
		40.00

Total Claim Amount **\$788.12**

1. Review Claim Details

To ensure accuracy review all of the information that you entered for the claim.

2. To Make Changes to Contract

Click the "Return to Edit" button and that will take you to the previous sales entry pages

3. To Complete Contract

Click "Submit Claim" to move forward and generate the claim

Confirmation

Thank you!

Your claim has been fully submitted into our system

Thank you!

You have successfully setup a claim for a nordyne Contract!

The Claim Number is 3391373

[Print](#) a copy of the invoice for your records.

[Return to Claim Home](#)

[Enter Another Claim](#)

After clicking "Submit Claim" you will be taken to the Thank You page where you can review your claim number. Reference the claim number when speaking to our Dealer Support Team. Your claim will be processed and you will receive payment or other information within 30 days.

Click one of the buttons at the bottom to:

1. Enter another Claim

2. Return to the Claim Home Page