

# Warranty Claiming Process

Updated: January 2024



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# WARRANTY 101

- **Warranty coverage begins upon installation.**
- **For products that are delivered damaged, the standard Return Material (RM) processes should be followed. This would NOT be warranty related. Your Customer Service representative or CE Account Manager should be advised, and an RMA requested.**

## To be considered as a warrantable event:

- There must be a failure that occurs during the warranty period.
- There must be a part that fails or a unit repair for a failure described on the warranty card.
- There are failures that are not covered under warranty such as: damage, delivered incomplete or incorrect, cosmetic damage, installation problems, misapplications
- Certain maintenance items are never covered such as: sheet metal components, casing, air filters, loose or poorly dressed wires or tubes (see next page for warranty exclusions).
- Refer to Warranty Conditions and Exclusions listed on the warranty certificate (found on HVAC Partners).
- DOA labour policy - To be eligible for DOA labour, an original component must fail within 30 days of initial start-up/installation in the finished goods equipment.
- Limited warranties typically cover the reimbursement for the failed part. Any labour allowance (outside of DOA) or unit exchanges are handled through tech support through the empowerment/concession process.
- Warranty claims must be submitted within 90 days of the repair date (60 days claim resubmission time when correcting rejected claims).
- Carrier reserves the right to audit claims and direct claims to manufacture review before disposition.
- Any exceptions to the stated warranty policy contained in the warranty certificate must be pre-approved by the Technical Service team.



# WARRANTY EXCLUSIONS & EXCEPTIONS

## Standard Product Warranty Exclusions

The table below details parts/materials that, unless specifically included in a special plan, are excluded from the standard product warranty.

Part	Residential
Belts	X
Brackets	X
Cosmetic Parts	X
Fuses	X
Gaskets	X
Grommets	X
Maintenance items	X
Paint	X
Panels and sheet metal (with the exception of functional or safety related sheet metal parts)	X
Pulleys	X
Refrigerant	X
Screws, nuts, and bolts	X

## Factors that influence the coverage period include:

- Specific product types (Residential or Commercial).
- Model & Serial
- For residential applications only: Whether it is the original or subsequent homeowner.
- The application types.
  - Residential Owner Occupied
  - Other Residential
  - Commercial
- For residential applications only: Whether the unit was registered within 90 days\*\* of installation.

*\*\*The exception to this registration requirement is for residents of Quebec. This province does not allow warranty conditions to be contingent on registration. If a unit is in QC, they will automatically receive the ENHANCED warranty coverage for owner occupied residential applications.*

There are several exceptions and exclusions to the coverage, such as:

- Damage or failure from improper installation, servicing, or operation.
- Damage or failure caused by floods, fires, lightning, and accidents.
- Damage or failure caused by the installation and use of products not provided by Carrier.
- Damage caused by rust.
- Labor costs involved in installing, replacing, or repairing units or defective parts.
- Failure to start from blown fuses, interrupted or unavailable electrical service, open circuit breakers or voltage conditions.
- Costs associated with refilling, replacing, or disposing of refrigerant.
- Routine maintenance such as lubrication and cleaning or replacing filters.
- Any products installed outside of the United States or Canada



# WARRANTY CLAIMING STEPS OUTLINED

## 1. CHECK WARRANTY STATUS

When an issue arises with a Carrier/Bryant/Payne unit, the contractor should check the warranty coverage by any of the following methods:

- Inputting the product's serial number in Carrier's Warranty Lookup tool on [www.carrierenterprise.ca](http://www.carrierenterprise.ca).
- Checking the entitlement screen in Service Bench using the serial of the unit.(see next page for step-by-step instructions for ENTITLEMENT SEARCH).
- Referring to the Products Warranty Card found on HVAC Partners.
- Call our Canadian Warranty Hotline 1-855-304-1895.

**NOTE: The end user may need to provide proof of purchase at the time of service if the installation date provided is more than 8 weeks from the factory's ship date.**

## 2. CONTACT WWG FOR PRICE & AVAILABILITY

The contractor can contact their local WWG Totaline store with the model/serial for the unit and the components they need. WWG can provide a quote and advise part #, price and availability.

## 3. ISSUE PO WITH WWG TO ORDER PARTS

If the end user wants to proceed with the repair, the contractor can call WWG and provide the quote # and issue a PO to place the order.

## 4. COMPLETE THE REPAIR

## 5. SUBMIT CLAIM ON SERVICE BENCH

- Regular accounts with terms - the customer would complete & submit their warranty claim on Service Bench.
- HOUSE cash account - these claims must be completed and submitted through Service Bench by the WWG branch.
- New OTC Process – with customer at counter, order is entered, claim is submitted, and product is provided without charging credit card. The next day, the debit is reconciled with a warranty credit that auto-processes.
- COD Customer specific account - the customer would complete & submit their warranty claim on Service Bench.
- For warranty claiming assistance, call our Canadian Warranty Hotline 1-855-304-1895.

**IMPORTANT: If the customer is COD and the New OTC process is not being followed, the claim MUST have Credit Card Payment selected.**

## 6. THE APPROVED SERVICE BENCH CLAIM WILL PROCESS A CREDIT

- Overnight for accounts with terms or
- 4-5 business days for CASH SALE customers.



1 SELECT ENTITLEMENT

SERVICEBENCH MAIN MENU

<b>QUICK LINKS</b> <ul style="list-style-type: none"><li>New Claim</li><li>Claim Hotlist</li><li>Claim Inbox</li><li>Claim Review</li><li>Import</li><li>New Product Registration</li><li>Entitlement</li></ul>	<b>PRODUCT SUPPORT</b> <ul style="list-style-type: none"><li>My Trading Partners</li><li>Help</li><li>Training</li><li>Business Management Systems</li><li>Email Support</li><li>Phone Support: 877-4.SBENCH (-1877-472-3624)</li><li>International Phone Support</li><li>Your Feedback</li><li>Mobile Application</li><li>Frequently Asked Questions</li><li>My Account</li></ul>
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2 SELECT CARRIER CORPORATION

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BY OSURION

Home Claims Contracts Registrations Reports Admin

Service Administrator Selection

Service Administrator
<input checked="" type="checkbox"/> CARRIER - Carrier Corporation



3 ENTER SERIAL ONLY & THEN SEARCH ENTITLEMENT

ENTITLEMENT SEARCH

Service Administrator

Serial Number\*

Model Number

First Name

Last Name

Phone

Service Contract Number

**CHECK ENTITLEMENT**

Install Date

Application Type

SEARCH ENTITLEMENT CHANGE SERVICE ADMINISTRATOR

IF NO WARRANTY INFORMATION POPULATES, THIS INDICATES THE UNIT HAS NEVER BEEN REGISTERED. ENTER THE INSTALL DATE AND APPLICATION TYPE

*Note: If the install date is unknown, add 6 weeks to the factory ship date that will be on the screen. (See step 4)*



Product History

### ENTITLEMENT SEARCH

Service Administrator: Carrier Corporation

Serial Number\*: 0411E01450

Model Number: 25HPA530A003

First Name:

Last Name:

Phone:

Service Contract Number:

**CHECK ENTITLEMENT**

Install Date:

Application Type:

Registration Id:	R173535194
Product Name:	15S,PERFORMANCE HP PURON 208/230V,1-PH
Model Number:	25HPA530A003
Discrete Model Number:	25HPA530A0031010
Serial Number:	0411E01450
Owner:	O'bree - O'bree, Michael
Address:	11 Kirkwood av Beaconsfield, QC H9W5L1
Phone:	514-506-6881
Manufactured Date:	01/24/2011
Shipped Date:	03/04/2011
Installed:	01/09/2012
Registration Date:	03/08/2021

ENTER install date & application type if unregistered only

Note: This unit was registered.  
All info populated with 1st search – s/n only.

**Install Date/Application Type are required to be populated for unregistered units.**

If the unit was not registered and the servicing contractor does not know the install/startup date of the unit, you can use either of the below methods for your startup date:

**For CE EMPLOYEES:**

- Check NxTrend in ICIES and find the actual ship date from CE Canada to the dealer. Use the day after the invoice date for your install date. (PREFERRED METHOD FOR ACCURACY)

**For CONTRACTORS/DEALERS:**

- add 6 weeks to the “shipped date” on the entitlement screen, which is Carrier Corp’s ship date to CE Canada.
- Add 90 days to the manufactured date.



5

SELECT "Start New Claim"

Registration Id:	8327258283
Product Name:	F/C-ECM,PURON,STANDARD-TXV 2.0 TON
Model Number:	FB4CNP025L00
Discrete Model Number:	FB4CNP025L00EEAA
Serial Number:	1022F37066
Owner:	MACHEK, CIERA
Address:	669 FOREST LAIR TALLAHASSEE, FL 32312
Phone:	863-915-0303
Manufactured Date:	03/08/2022
Shipped Date:	03/08/2022
Date Installed:	05/03/2022
Registration Date:	05/04/2022
Date Transferred:	
Warranty Policy Code:	CP11
Warranty Policy Description:	FOR SPECIFIC COVERAGE ON NON-REGISTERED UNITS INSTALLED IN OWNER OCCUPIED, NON-OWNER OCCUPIED AND COMMERCIAL APPLICATIONS, REFER TO WARRANTY CERTIFICATE
Mark As:	
Sold to Distributor Name:	Florida Distribution, Orlando, LE
Sold to Distributor Number:	21088
Sold to Distributor City:	Orlando
Sold to Distributor State:	FL
Replacement Of Model(s):	
Replacement Of Serial Number(s):	

\*\*\*Warranty Claims Must Be Submitted Within 90 Days of the Repair Date\*\*\* Claims submitted beyond 90 days from the date of repair may be automatically rejected.

Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed After	Warranty Start	Warranty Stop
ALL	Owner Occupied Residential	Original	Enhanced Parts Warranty	10 years	01/01/2009	05/03/2022	05/03/2032
Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed After	Warranty Start	Warranty Stop
ALL	Owner Occupied Residential	Subsequent	Standard Parts Warranty	5 years	00/01/2012	05/03/2022	05/03/2027

[Search Entitlement](#)
[Start New Claim](#)
[Change Service Administrator](#)

- Validate the unit has warranty.
- Pay attention to Original or Subsequent warranty details.
- Select Start new claim.
- If the unit is registered, the startup, and owner information will follow over to the claim and populate the appropriate fields.



Always check **Product History** before proceeding with claim to ensure you are not filing a duplicate claim



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by asurion

Home Claims Contracts Registrations Reports Admin

[Product History](#)

### Entitlement Search

Service Administrator: Carrier Corporation

Serial Number\*: 1022F37066

Model Number: FB4CNP025L00

First Name:

Last Name:

Phone:

Service Contract Number:

**Check Entitlement**

Install Date:

Application Type: Select Application Type

Registration Id:	<b>R527238283</b>
Product Name:	F/C-ECM,PURON,STANDARD-TXV 2.0 TON
Model Number:	FB4CNP025L00
Discrete Model Number:	FB4CNP025L00EEAA
Serial Number:	1022F37066
Owner:	MACHEX, CIFRA

### Product History

Product Number: 57CNwB30060--TP Serial Number: 2215C09182 Service Administrator: CARRIER - Carrier Corporation

#### Claim History

	Service Provider Location	Claim Number	Reference Number	Claim Type	Status	Date Submitted	Amount Submitted	Date Approved	Am
🔍	Griles Heating and Air Conditioning - 130352-22134	CRQ264XL6	CRQ264XL6	Warranty	Paid	02/18/2022		02/18/2022	
🔍	Griles Heating and Air Conditioning - 130352-22134	CRNBGG9CJ	CRNBGG9CJ	Warranty	Paid	08/04/2020		08/04/2020	

#### Service History

Service Date	Claim Number	Customer Complaint	Service Explanation	Part Number	Part Quantity	Part Name
02/17/2022	CRQ264XL6		Removed and replaced faulty main control board	LH33wP009#RCD	1	CONTROL BOARD, IGNITER
06/04/2020	CRNBGG9CJ		Replaced failed motor	HC 33GE 2418RCD P291-4054R5#RCD	1 1	MOTOR RUN CAP RND5 440V 40/5 MFD

#### Returns/Exchange History

- The Product History screen will display any previous claims.
- Review the Service History to confirm you are not duplicating a claim.
- Check for multiple repairs (2 or more on the same part). If already 2 claims for the same part, approval must be obtained by DSM.
- Select View Entitlement to return to the Entitlement Search page.



1. Hover over the CLAIMS tab.
2. Click on the Entitlement hyperlink.
3. Enter the Serial Number.
4. Hit "Enter" or click on the SEARCH ENTITLEMENT button.

The screenshot shows the ENTITLEMENT SEARCH form. The 'Serial Number\*' field is populated with 'A191060234' and is highlighted with a red circle containing the number '3'. The 'SEARCH ENTITLEMENT' button at the bottom is highlighted with a red circle containing the number '4'.

Service Administrator: United Technologies Corporation

Model Number:

Serial Number\*: A191060234

First Name:

Last Name:

Phone:

Service Contract Number:

**CHECK ENTITLEMENT**

Install Date:

Application Type: Select Application Type

SEARCH ENTITLEMENT

**ENTITLEMENT SEARCH**

Service Administrator: United Technologies Corporation

Model Number: N9DSE001714A

Serial Number: A191060234

First Name:

Last Name:

Phone:

Service Contract Number:

**CHECK ENTITLEMENT**

Install Date: 06/01/2019

Application Type: Owner Occupied Residential

**Product Information**

Product Name: DOWNFLOW 95% GAS FURN 60K FOR MAIN HOME

Model Number: N9DSE001714A

Discrete Model Number: N9DSE001714A1

Serial Number: A191060234

Owner:

Address:

Phone:

Replacement Of Model(s):

Replacement Of Serial Number(s):

**Warranty Information**

Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed After	Warranty Start	Warranty Stop
ICP	ALL	ALL	Primary Heat Exch-Furnace	20 years	01/01/2019	06/01/2019	06/01/2039
			Standard Parts Warranty	5 years			06/01/2024

**SEARCH ENTITLEMENT** **START NEW CLAIM** **NEW PRODUCT REGISTRATION**

5. If the unit has not been registered, you will need to enter the Installation Date & Application Type.

6. Verify the warranty for the part in question is still active. (Note: Check Product History to avoid duplicate claims).

7. Click on the START NEW CLAIM button.

*Steps 8 & 9 are only for CE employees entering claims.*

**NEW CLAIM - ENTER A SERVICE PROVIDER**

Either select the Service Administrator or Service Provider account number OR enter the ServiceBench Service Provider Id.

Service Administrator: UTC - United Technology Corporation Account Number:

Service Provider ID:

**SELECT SERVICE PROVIDER** **CANCEL**

The screenshot shows the ServiceBench 'WARRANTY CLAIM' form. The form is divided into several sections: 'CLAIM INFORMATION', 'EQUIPMENT INSTALLATION INFORMATION', and 'SERVICE DETAIL INFORMATION'. Red circles with numbers 10 through 16 are overlaid on the form to indicate specific fields to be filled out.

**CLAIM INFORMATION:**

- 10. Dealer Name: Quality Heating / AC
- 11. Model Number: HSDHE001714A
- 12. Warranty Type: Standard Warranty
- 13. Unit Installed/Startup Date: 05/10/09

**EQUIPMENT INSTALLATION INFORMATION:**





- 14. Installation Owner First Name: Nicholas
- 14. Installation Owner Last Name: Pappagorgia
- 15. Application Type: Owner Occupied Residence

**SERVICE DETAIL INFORMATION:**

- 16. Fail Date: 06/25/09
- 16. Repair Date: 06/27/09

Note: If the equipment has been previously registered, many of these fields will already be populated for you.

10. Your company information will be populated
11. The Model Number and Serial Number carry over from the ENTITLEMENT search screen.
12. Select the Warranty Type (we will use Standard Warranty in this example).
13. Enter the equipment installation date.
14. Complete the Customer Information section (always enter only the two-digit code for province).
15. Select the Application type and indicate whether this is the Original Equipment Owner.
16. Enter the Fail Date and Repair Date.

<b>a</b>	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition	Unit Price	<b>e</b>	Part Mark Up	Part Price Ext.
<input checked="" type="checkbox"/>	1	AQA038KAB	11AA11-A11		<input type="checkbox"/>	1	 AQA038KAB	COMPRESSOR, SCROLL	226B22-B2222			0.00			
<input type="checkbox"/>	1	3301000213			<input type="checkbox"/>	1	 3301000213	CAPACITOR				0.00			
<input type="checkbox"/>					<input type="checkbox"/>										
<input type="checkbox"/>					<input type="checkbox"/>										

17. Complete a part line for each part being claimed for the repair.

- Only one part should be marked as the “Causal Part”. The Causal Part is the part that most likely caused the failure.
- “Failed/Replaced Part Serial Number” only needs to be completed if you are claiming a compressor. Otherwise, leave it blank.
- “Failed Part Install Date” should be left blank on Standard Warranty claims. It should only be completed when claiming Service Parts (more on this later).
- Use the magnifying glass to search for the proper Replaced Part Number.
- Leave Unit Price as it is.

After completing the parts section, click SAVE at the bottom of the claim.

**18** After you SAVE, you will see any claim errors that need to be addressed at the top of the claim screen

**19** The Component Code will auto-populate based on the selection of the Causal Part

**20** Provide a complete Diagnosis by answering the 3 questions

**21** Select the appropriate Defect Code based on component code

**22** You may enter a comment on the claim if there is any additional detail or explanation to provide

**23** Do not enter anything in this section — it is not used for standard claims

**24** Before you click SUBMIT:

- click the SAVE button one last time — if there are any claim errors at the top of the claim screen, you will need to address them before submitting your claim
- after you have reviewed the claim and addressed any errors, you can click SUBMIT

- After you SAVE, you will see any claim errors that need to be addressed at the top of the claim screen
- The Component Code will auto-populate based on the selection of the Causal Part
- Provide a complete Diagnosis by answering the 3 questions
- Select the appropriate Defect Code based on component code
- You may enter a comment on the claim if there is any additional detail or explanation to provide
- Do not enter anything in this section — it is not used for standard claims
- Before you click SUBMIT:
  - click the SAVE button one last time — if there are any claim errors at the top of the claim screen, you will need to address them before submitting your claim
  - after you have reviewed the claim and addressed any errors, you can click SUBMIT

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HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Claim Inbox • Claim Review • Product History

### WARRANTY CLAIM

Claim Number  
Account Number  
Claim Status  
Claim Date  
Claim Submitted Date  
Amount Approved

CLAIM # 192007- BLE-INS INC  
401 HART LN  
PLEASANTVILLE, TN 37087 UNITED STATES

\*\* PAPER CLAIM \*\* NO

Manufacturer: CARRIER - Carrier Corporation  
Dealer: 192007225 - BLE-INS INC Dealer Location: 192007 - BLE-INS INC  
Distributor: Distributor Location:  
Dealer Name: Quality Heating / A/C  
Dealer Address\*: 21265 Prospect  
City, State, Zip/Postal Code: Pleasantville IA 50225  
Reference Number: Additional Reference Number:  
Model Number\*: HPOSE0901714A Competitive Equipment:  
Serial Number: A1D1060234 Stock Unit:  
Warranty Type\*: Bulletin Unit Installed/Startup Date: 05/10/2019

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information.

#### EQUIPMENT INSTALLATION INFORMATION

Equipment Owner Company Name:

#### SERVICE CLAIM INFORMATION

Fail Date\*: 06/26/2019 Repair Date\*: 06/27/2019  
Optional Contract Number: CCS/DSO Job Number:  
Operating Letter Number:  
Bulletin/Authorization Number: SB16001DA Credit Card Payment:  
\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial Number  
Replacement Model Number: Replacement Serial Number:  
Replacement Invoice Number: Replacement Unit Price:  
Replacement Disposition: Replacement Mark Up:  
Replacement Approved Amount: Requested Replacement Amount:  
Number of Part Lines: 4

Failed Failed Failed Part Failed Part Replaced Replaced Replaced Part Replaced Part

Start a claim as you normally would through Entitlement (explained page 6); below are the things you need to be aware of that are different from entering a “standard claim”.

1. Select Bulletin as the Warranty Type; review bulletin claiming instructions if applicable.
2. Enter the applicable Bulletin Number.

*Note: Specific claiming instructions will be provided on the Bulletin depending on the issue; be sure to only claim what is covered according to the bulletin. If you need help entering a bulletin claim, contact the CEC Warranty Hotline 1-855-304-1895 and they can assist. Often there are supplemental claiming instructions created by the distributor.*

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HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Claim Inbox • Claim Review • Product History

### WARRANTY CLAIM

Claim Number: [Blank] Account Number: [Blank] Claim Status: New Claim Date: 07/05/2018 Claim Submitted Date: [Blank] Amount Approved: [Blank]

\*\* PAPER CLAIM \*\* NO

Manufacturer: Carrier - Carrier Corporation Dealer Location: [Blank]

Dealer: 18200228 - BLU-INS INC Distributor Location: [Blank]

Distributor: [Blank]

Dealer Name: Quality Heating / AC Dealer Address\*: 21265 Prospect City, State, Zip/Postal Code: Pleasantville IA 50225

Reference Number: [Blank] Additional Reference Number: [Blank]

Model Number\*: N8DSE06017144 Competitive Equipment:  Stock Unit:

Serial Number: A191060234 Unit Installed/Startup Date: 05/10/2019

Warranty Type\*: Unit Exchange **1**

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

#### EQUIPMENT INSTALLATION INFORMATION

Equipment Owner Company Name: [Blank]

#### SERVICE DETAIL INFORMATION

Fail Date\*: 06/25/2019 Repair Date\*: 06/27/2019

Optional Contract Number: [Blank] CCS/DSO Job Number: [Blank]

Operating Letter Number: [Blank]

Bulletin/Authorization Number: [Blank] Credit Card Payment:

\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial fields

Replacement Model Number: N8DSE06017144 **2** Replacement Serial Number: A191060240 **3**

Replacement Invoice Number: [Blank] Replacement Unit Price: [Blank]

Replacement Disposition: [Blank] Replacement Mark Up: [Blank]

Replacement Approved Amount: [Blank] Requested Replacement Amount: [Blank]

Number of Part Lines: 4 **4**

Failed Entered Replaced Replaced

Start a claim as you normally would through Entitlement (explained page 6); below are the things you need to be aware of that are different from entering a “standard claim”.

1. Select Unit exchange as the Warranty Type;
2. Enter the replacement Model Number
3. Enter the Replacement Serial number
4. Enter the order/invoice # from the distributor.

*Note: The Warranty type would auto-correct to a Unit Exchange when a Replacement Model and Serial Number is entered in this section. Do not enter anything on the parts lines on the lower section of the claim.*

*If you need help entering a unit exchange claim, contact the CEC Warranty Hotline 1-855-304-1895 and they can assist.*

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HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Claim Inbox • Claim Review • Product History

### WARRANTY CLAIM

Claim Number: 1105266  
Account Number: 1105266  
Claim Status: New  
Claim Date: 07/03/2019  
Claims Submitted Date: Almost Approved

\*\* PAPER CLAIM \*\* NO

Manufacturer: Carrier - Carrier Corporation  
Dealer: 1105266 - BLUE-INS INC Dealer Location: 1105266 - BLUE-INS INC  
Distributor: Distributor Location:   
Dealer Name: Quality Heating / AC  
Dealer Address\*: 21205 Prospect  
City, State, Zip/Postal Code: Ploosonville IA 50225  
Reference Number: Additional Reference Number:   
Model Number\*: N90SE2001714A  Competitive Equipment **2**  
Serial Number: A191980254  Stock Unit  
Warranty Type\*: Service Parts **1** Unit Installed/Startup Date: 05/10/2019  
\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information.

#### EQUIPMENT INSTALLATION INFORMATION

Equipment Owner Company Name: \_\_\_\_\_

Fail Date\*: 06/25/2019 Repair Date\*: 06/27/2019  
Optional Contract Number: \_\_\_\_\_ CCS/ISO Job Number: \_\_\_\_\_  
Operating Letter Number: \_\_\_\_\_  
Bulletin/Authorization Number: \_\_\_\_\_  Credit Card Payment  
\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial#s  
Replacement Model Number: \_\_\_\_\_ Replacement Serial Number: \_\_\_\_\_  
Replacement Invoice Number: \_\_\_\_\_ Replacement Unit Price: \_\_\_\_\_  
Replacement Disposition: \_\_\_\_\_ Replacement Max Up: \_\_\_\_\_  
Replacement Approved Amount: \_\_\_\_\_ Requested Replacement Amount: \_\_\_\_\_  
Number of Part Lines: 4

Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Month/Year	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition
1	1105266	1105266	06/2019	<input checked="" type="checkbox"/>	1	1105266	CAPACITOR			

**3**

Start a claim as you normally would through Entitlement (explained page 6); below are the things you need to be aware of that are different from entering a “standard claim”.

A Service parts claim is when a unit is out of warranty. A part was purchased and received a 1–2-year parts warranty (Depending on part). That part fails within the parts warranty period and requires replacement a subsequent time.

1. Select Service Parts as the Warranty Type;
2. Competitive Equipment box would be marked only if the part was not installed on a Carrier/Bryant/Payne unit.
3. Failed part install date must be entered on the part line.

*Note: If you need help entering a unit exchange claim, contact the CEC Warranty Hotline 1-855-304-1895 and they can assist.*

**WARRANTY CLAIM**

967654-31194 - TEST DEALER - DO NOT DELETE  
 7310 W MORRIS ST  
 INDIANAPOLIS, IN 46234-1358 UNITED STATES  
 317-243-8651

Claim Number: 967654  
 Account Number: 967654  
 Claim Status: 10/3  
 Claim Date: 10/3  
 Claim Submitted Date: Amount Approved

MANUFACTURER: UTC - United Technologies Corporation  
 DEALER: 884667986 - TEST DEALER - DO NOT DELETE  
 DISTRIBUTOR: 967654-31194 - TEST DEALER - DO NOT DELETE

Model Number: 044BB3424DN3  
 Serial Number: 2719E110000  
 Warranty Type: **Optional Contract** (1)

**EQUIPMENT INSTALLATION INFORMATION**

Equipment Owner Company Name: [Blank]  
 Installation Owner First Name: [Blank]  
 Installation Address: [Blank]  
 City, State/Province Postal Code: [Blank]  
 Country: [Blank]  
 Email: [Blank]  
 Phone 1: [Blank]  
 Application Type: Owner Occupied Residential

**SERVICE DETAIL INFORMATION**

Fall Date: 10/10/2019 (2)  
 Optional Contract Number: FLH2158000  
 Bulletin/Authorization Number: [Blank]  
 Replacement Model Number: [Blank]  
 Replacement Invoice Number: [Blank]  
 Replacement Disposition: [Blank]  
 Replacement Approved Amount: [Blank]  
 Number of Part Lines: 4

Repair Date: 10/11/2019  
 CCS/DSO Job Number: [Blank]  
 Credit Card Payment: [Blank]  
 Replacement Serial Number: [Blank]  
 Replacement Unit Price: [Blank]  
 Replacement Mark Up: [Blank]  
 Requested Replacement Amount: [Blank]

Causal Part	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition	Unit Price
	1	P201-3074R				1	P201-3074R/ROD			1234567890		10.00

(3)

Start a claim as you normally would through Entitlement (explained page 6); below are the things you need to be aware of that are different from entering a “standard claim”.

1. Select Optional Contract as the Warranty Type;
2. Enter the appropriate Contract Number (Helpful Hint: copy and paste contract number from the entitlement screen BEFORE starting your claim)
3. Enter the purchase price off the distributor’s invoice.

*Note: If you need help entering an Optional Contract claim, contact the CEC Warranty Hotline 1-855-304-1895 and they can assist.*

*This process only applies for contracts sold by Carrier prior to 2013. For contracts purchased after 2013 through Climate Shield, the contact information can be found on the lower section of the Entitlement screen.*

**COMPETITOR PARTS CLAIM**

Approved 3<sup>rd</sup> Parts purchased from a 3rd party (competitor) due to no availability of part at WWG Totaline, must be submitted as follows:

The claim needs to be entered as follows with the competitor's invoice attached to each claim:

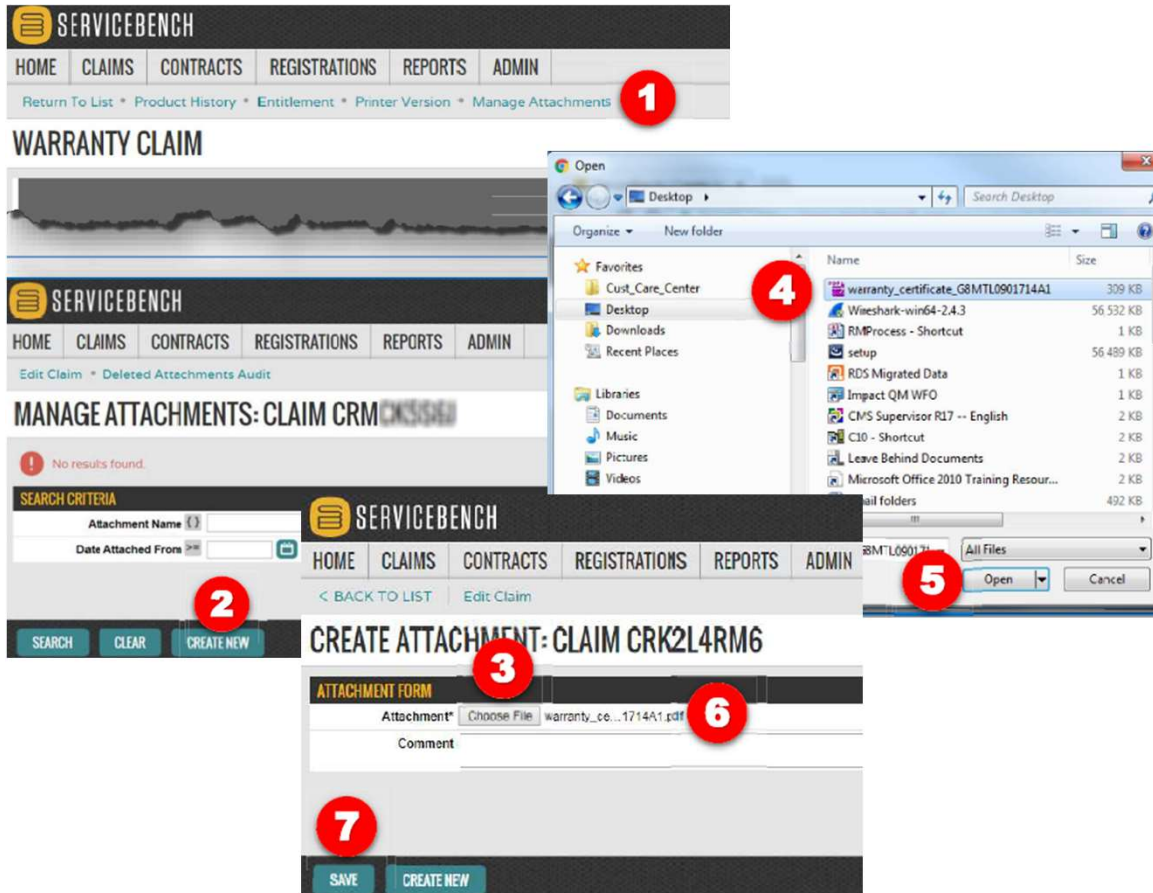
Please have the OLD part number under the failed part number & the new part number in the replaced part area (see example below). You will need to select COMPETITOR PART and manually type in the part number as it appears on your order/invoice.

Attach a copy of the distributor invoice to the claim (see next page for how to attach a document to a claim)

When it is submitted, it will go to “Requires Review”. This will come to our group here through our claims reports and we will take over the claim from there and get the Tech Support Managers approval before we submit to the manufacturer for their approval.

?	Causal Part	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	?	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description
<input checked="" type="checkbox"/>		1	P291-4054RS		08/20/2013	<input checked="" type="checkbox"/>		1	TP-CAP-40/5/440R	





1. Select the Manage Attachments link at the top of the claim form.
2. Click CREATE NEW button.
3. Click Choose File button.
4. Select the file from your computer.
5. Click Open.
6. You should see your file name here.
7. Click SAVE.

Confirmation that the document has been attached will appear at the top of the screen. Select the Edit Claim link button to return to the claim. The attachment will be a link at the bottom of your claim page.

*Note: If you need help attaching a document, contact the CEC Warranty Hotline 1-855-304-1895 and they can assist.*

**PAID****APPROVED****REQUIRES  
REVIEW****REJECTED****CORRECTED****SAVED****CLOSED**

- **PAID** — Claim has been approved and reimbursement has been made to the distributor.
- **APPROVED** — Claim has been approved and waiting to be processed through the weekly payment cycle; (typical payment cycle = claims approved Thurs thru Wed are paid on Friday).
- **REQUIRES REVIEW** — Claim has been sent to either the distributor or Carrier for review and disposition.
- **REJECTED** — Claim did not meet all of the system (policy) validations or lacked required information.
- **CORRECTED** — Rejected claim has been resubmitted on a different claim number.
- **SAVED** — Claim has been initiated by dealer or distributor but has not been submitted.
- **CLOSED** — Claim remained in a **SAVED** status for more than 120 days; system automatically closed the claim.

The image shows two screenshots of the SERVICEBENCH web application. The top screenshot displays the 'SERVICEBENCH MAIN MENU' with a 'QUICK LINKS' section. A red circle with the number '1' highlights the 'Claim Review' link. The bottom screenshot shows the 'CLAIMS' tab selected in the main menu, with a red circle and the number '2' highlighting the 'Claim Review' link in the 'CLAIMS MAIN' dropdown menu. The word 'OR' is placed between the two screenshots.

Claim review – is used for locating claims. Claims can be located by using either the serial number, claim number or reference number.

In this example, the search was based on the claim #.



1. Click on the Claim Review link under QUICK LINKS on the home page dashboard.
2. Hover over the CLAIMS tab and click on the Claim Review hyperlink.

## Claim Review

To find claims based on additional fields, use the Advanced Search Link above

Service Administrator	Any	▼
Serial Number	<input type="text"/>	
Claim Number(s)	CRR5H938Z	
Reference Number(s)	<input type="text"/>	
Transaction Number(s)	<input type="text"/>	

### Search Results

	Service Administrator	Service Provider Location	Claim Number
 	Carrier Corporation		CRR5H938Z

4

2

Search

In this example, the search was based on the claim #.

1. Search by Claim Number (up to 5 at a time, separated by semicolon).
2. Select Search
3. From the Search results, you can view a specific claim by clicking on the eye icon. If a pencil icon displays, you can access and edit the claim.
4. View the claim by clicking the “Eyeball”

Note: follow the same process using the search by serial or reference method, by populating those spaces with corresponding information

**SERVICEBENCH** Dev warranty1 Help

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

**SERVICEBENCH MAIN MENU**

**QUICK LINKS**

- Claim Hotlist **1**
- Claim Inbox
- Claim Review
- Import
- New Product Registration
- Entitlement

**PRODUCT SUPPORT**

- My Trading Partners
- Training
- Live Chat
- Business Management Systems
- Email Support
- Phone Support: 877.A.SBENCH (+1877-472-3624)
- International Phone Support
- Your Feedback
- Mobile Application
- My Account

**NEWS**

My News

**SERVICEBENCH** Dev warranty1 Help

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

**SERVICEBENCH MAIN MENU**

**CLAIMS MAIN**

- Claim Hotlist **2**
- Saved Claims
- Submitted Claims
- Rejected Claims
- Approved Claims
- Export External Claims

**INPUT**

- Entitlement
- New Claim From Dispatch/Job

**RETURNS**

**PROCESSING**

- Claim Hotlist
- Claim Inbox
- Distributor Review
- Claim Review
- Claim Preauthorization
- Parts Receipt

**MAINTENANCE**

- Reference Number Maintenance

**SUPPLIER RECOVERY**

- Statements
- Performance Summary

**SERVICES**




- Import
- Export
- Payments
- Product Search

1. To view saved claims, click on the Claim Hotlist link under the QUICK LINKS section of the SERVICEBENCH MENU
2. Hover on the CLAIMS tab and select the Claim Hotlist.
3. Click pencil icon (edit) to open claim for completion.

### CLAIM HOTLIST

Service Administrator UTC - United Technologies Corporation Service Provider [REDACTED]

Claim Number [REDACTED] Authorization Number [REDACTED]

	Claim Number	Reference Number	Claim Type	Status	Claim Date
<b>3</b>  	CRM5C45FL	635226	Warranty	Saved	05/17/2019
 	CRM6D5B18	6373651	Warranty	Saved	06/24/2010