

# Track Insurance Claims with FleetMentor®

*FleetMentor's Claims & Insurance features address one of the most expensive and difficult to manage aspects of any transport operation.*

The screenshot shows the FleetMentor web application interface. At the top, there's a navigation bar with 'Admin | Search | Contact Us | Help | Logout'. Below that, a 'TOOLBOX' section is highlighted, containing a list of tools categorized into: Operations (Business & Planning, Claims & Insurance, Vehicles & Equipment), Personnel (Qualification & Training, Hiring & Retention, Drug & Alcohol Testing, Performance Evaluations), Safety (DOT/OSHA Recordkeeping, Hazardous Materials Management), and a callout box for 'Claims & Insurance' which lists: Accident Claim Tracking, Loss and Damage Claims, and Insurance Policy Manager.

## Accident Register

**ACCIDENT RECORD - REGISTER INFORMATION**

Driver Name: Doe, John      Driver Location: JJKA

DOT Register    Accident Detail    Our Vehicle(s)    Their Vehicle(s)    Witnesses    Print

Accident No.: 234      DOT reportable?  Yes  No

Date of accident: 10/23/2008      Day: Thursday      Time: 1:30 PM

City/town at/closest to accident location: Milwaukee

State/Province: Wisconsin

Describe accident location (Ex., address, landmark, intersection):  
Interstate 43 near Exit # 56

No. of injuries: 0      No. of fatalities: 0

No. vehicles involved: 2      No. people involved: 2

Were hazardous materials released other than fuel spilled from the fuel tanks of vehicle involved in the accident?  
 No     Yes

Was a citation issued at the scene?  
 No     Yes

**ABC Company Corp**    Your Company Name Here  
DETAILED ACCIDENT REPORT

**General Information**

Accident No.: A2008-6      DOT Reportable? Yes

Date of accident: 12/11/2008      Day: Thursday

Time: 1:00 AM

City/town at/closest to accident location: Pine Hills      State/province: Florida

Describe accident location (Ex., address, landmark, intersection):  
Driver Lewis was traveling 20mph down the off ramp. Another vehicle cut driver off. Driver slammed on brakes and skid into vehicle. Description of accident confirmed by several other witnesses and police analysis.

No. of injuries: 1      No. of fatalities: 0

No. of vehicles involved: 2      No. of people involved: 2

Were hazardous materials released other than fuel spilled from the fuel tanks of the vehicle involved in the accident? No

Was a citation issued at the scene? No

**Accident Detail**

**Road / Driving Conditions**

Visibility:      Traffic Conditions: Medium

FleetMentor's Accident Register tool allows for the recording and tracking of accident information. You can use the tool to simply generate your DOT Accident Register or take advantage of the advanced recordkeeping options to fulfill your management reporting needs.

## Accident Claims Tracking

**VIEW CLAIM RECORD**

Print

Claim | Diary | Claimants | Reserve Transactions | Supporting Documents

**Claim Information** Edit

Claim No.: 569-DJ-90  
 Claim open date: 10/24/2008  
 Claim Status: Open  
 Claim opened by: Stephanie Dean  
 Initial Reserve: \$410.00  
 Claim end date: 12/23/2008  
 Was claim referred to insurance company for handling? Yes

**Accident Information**

Accident No.: 234  
 Date of accident: 10/23/2008 Time: 1:30 PM  
 Driver: Doe, John  
 Company location: JJK  
 Describe the accident event:  
 Reported to insurance company? Yes

**Claim Detail Report**  
 ABC Companies, Inc.

**Claim File Record**  
 Claims No.: 08-001  
 Claim Open Date: 4/5/2008  
 Was claim referred to insurance company for handling?  
 Claim End Date: 4/1/2013

**Accident Information**  
 Accident No.: 08-001  
 Date of Accident: 4/1/2008  
 Driver: Brian Driver  
 Company Location: ABC Terminal A  
 Time: 12:15 PM

**Describe the accident event:**  
 Driver stated he began to change lanes from right to center lane. Did not see other vehicle prior to or during occurrence when lane change 1/2 complete. Driver states other vehicle may have been changing lanes from same time.

**Reported to Insurance Co: Yes**

**Diary Entries**

Date/Time	Action	Explanation
5/27/2008 11:16 AM	Phone conversation with Beverly Henderson Entered by Hank Henderson	Spoke with Beverly regarding settlement. Site scores needed to be an adjuster. Damages (booked off) the moment we have a decision based on the Friday review if no further.
5/19/2008 3:15 PM	Received denial from Beverly. Entered by Hank Henderson	Received denial from Beverly. Entered by Hank Henderson
5/12/2008 1:14 PM	Phone conversation with Beverly Maypay Entered by Hank Henderson	Had phone conversation with Beverly regarding trucking. To be sent a denial fee. A primary witness into the insured who at the would not provide point.
5/8/2008 3:13 PM	Received certified mail receipt. Entered by Hank Henderson	Received certified mail. Attached to file.
5/2/2008 12:18 PM	Sent Claims Letter. Entered by Hank Henderson	Sent claim letter to Beverly and repair overtime. Attached to file.
4/30/2008 8:17 AM	Sent Denial Letter. Entered by Hank Henderson	Sent denial letter to Beverly. Attached to file.
4/27/2008 2:16 PM	Contact OVI's claim adjuster. Entered by Hank Henderson	Made direct contact with adjuster. OVI Insurance Information. Beverly is 1-800-855-1212, 2003

May 13, 2008

FleetMentor provides you with a comprehensive method for tracking and maintaining your accident claim information. It builds claim records off of your Accident Register for efficient and quick recordkeeping. In addition to a claim diary, this tool tracks reserves, allows you to track and control claim costs, and allows you to set reminders for timely claim actions.

**Claim Reserve Balance - All Claims**  
 1/1/2007 - 12/31/2008

Claim No.	Open Date	Claim Status	Initial Reserve	Reserve Paid	Outstanding Reserve
08-005	10/11/2008	Open	\$5,000.00	\$1,250.75	\$3,749.25
<b>Total for ABC Trucking - Chicago:</b>			<b>\$5,000.00</b>	<b>\$1,250.75</b>	<b>\$3,749.25</b>
07-011	12/13/2007	Reopened	\$12,000.00	\$4,567.00	\$7,433.00
08-003	5/16/2008	Open	\$8,500.00	\$3,500.50	\$5,999.50
08-004	6/29/2008	Open	\$25,000.00	\$175.00	\$24,825.00
<b>Total for ABC Trucking - Milwaukee:</b>			<b>\$45,500.00</b>	<b>\$7,262.50</b>	<b>\$38,237.50</b>
08-001	2/17/2008	Closed	\$15,000.00	\$10.00	\$14,990.00
08-002	3/27/2008	Closed	\$10,000.00	\$0.00	\$10,000.00
<b>Total for ABC Trucking - Minneapolis:</b>			<b>\$25,000.00</b>	<b>\$10.00</b>	<b>\$24,990.00</b>
<b>Reserve Totals:</b>			<b>\$75,500.00</b>	<b>\$8,523.25</b>	<b>\$66,976.75</b>

## Insurance Policy Manager

**INSURANCE RECORD** ! Date field has an alert

Edit

**Insurance Record**

Company location: JJK  
**Insurance Company**  
 Company name: Keller Insurance Company  
 Claims reporting phone: 444-777-8888  
 Agent name: John Jacobs  
 Agent phone: 555-666-7777

**Policy Information**

Policy status: Active  
 Policy dates: 1/1/2008 to 12/31/2008 ! alert  
 Policy no.: 15-4569823  
 Insurance type: Guaranteed Asset Protection (GAP)  
 Policy type: Commercial  
 Policy responsibility: Carrier  
 Third party administrator:  
 Coverage limit: \$ 50,000.00  
 Deductible: \$ 500.00

**Payment Information**

Total Premium: \$ 2,000.00  
 Pay frequency: Monthly

**Add Payment**

Date	Check #	Amount	Balance Due
10/24/2008	6627	\$1000.00	\$1000.00

**ABC Companies, Inc.**  
 Insurance Policy Responsibility

**CARRIER RESPONSIBILITY**

Policy No.	Exp Date	Insurance Company	Coverage	Coverage Limit	Vehicle Owner
TC-7000	04/30/2008	Fleet Insurance Company	Terminal Coverage	1,000,000.00	ABC Sample Company
PL-5544	06/30/2008	Fleet Insurance Company	Primary Auto Liability	5,000,000.00	ABC Sample Company
CL-0555	06/30/2008	Trucking Insurance Company	Cargo Insurance	500,000.00	ABC Sample Company
WC-0145	12/31/2008	California Insurance	Workers' Compensation	500,000.00	ABC Sample Company

**VEHICLE OWNER RESPONSIBILITY**

Policy No.	Exp Date	Insurance Company	Type	Coverage Limit	Vehicle Owner
OA-4784	05/20/2008	California Insurance	Occupational Accident	1,000,000.00	Brian Driver
BT-5541	05/31/2008	Trucking Insurance Company	Non-Trucking Liability	500,000.00	Owner James
PD-1544	05/31/2008	Fleet Insurance Company	Physical Damage	500,000.00	Owner James
OA-00124	05/31/2008	Fleet Insurance Company	Occupational Accident	1,000,000.00	Owner James
GP-0154	06/11/2008	Trucking Insurance Company	GAP Insurance	100,000.00	Owner James
GP-0012	07/31/2008	California Insurance	GAP Insurance	100,000.00	Brian Driver
BT-1245	07/31/2008	California Insurance	Non-Trucking Liability	1,000,000.00	Brian Driver
PD-4578	07/31/2008	California Insurance	Physical Damage	500,000.00	Brian Driver

Use the Insurance Policy Manager to track your policies in a single location, set alerts for expiring policies, and generate reports for policy responsibility, expiration dates, and policies covered by each insurance company.

Let J. J. Keller's FleetMentor® help you track your insurance policies and claims. [Sign up for a free, 30-day trial at www.fleetmentor.com.](http://www.fleetmentor.com)