

ClaimsAgent UX Adoption Toolkit

Part 1: Getting Started with ClaimsAgent

Getting Started with ClaimsAgent – A Guide for First-Time Users

Welcome to ClaimsAgent!

ClaimsAgent is your AI-powered virtual assistant designed to help you handle common claim-related tasks more quickly and confidently. If you've never used a virtual assistant before, don't worry — this guide will walk you through what to expect and how to get the most out of the tool.

What Can ClaimsAgent Help You With?

- Submitting a new claim
- Checking the status of an existing claim
- Fixing errors or updating claim information
- Uploading additional documents
- Answering common questions about workflows, policies, and next steps

What It Won't Do

- It won't submit anything without your confirmation
- It won't make decisions for you — it supports your workflow, not replaces it
- It won't override compliance or audit requirements

How to Interact with ClaimsAgent

You can talk to it just like you would ask a coworker for help. You can:

- Type questions (e.g., "How do I update a claim?")
- Use action buttons (chips) like "Submit New Claim" or "Check Status"

Examples of Good Queries:

"Show me the status of claim #45682"

"Upload supporting docs to claim I submitted yesterday"

"What's going on?" (Too vague)

Helpful Tips

- ClaimsAgent responds better to clear, specific questions
- Look out for confirmation messages before submitting anything
- Use the chips to speed up common actions
- You can always ask follow-up questions

FAQs & Troubleshooting

Q: What if I can't find what I need?

A: Try rephrasing your question or check the task menu for suggestions.

Q: Can I still use the old system?

A: Yes. ClaimsAgent is an added layer of support — not a replacement.

Q: Is ClaimsAgent tracking everything I do?

A: Yes, for audit and compliance purposes, just like the regular system.

Why We Built This for You

We know your work is fast-paced, complex, and often frustrating. ClaimsAgent was designed based on feedback from claims adjusters just like you. It's here to help reduce clicks, prevent small errors from becoming big problems, and make your day a little easier.

Try it out — and let us know what you think!

Part 2: One-Page Visual Summary

ClaimsAgent One-Page Visual Summary – Content Draft

Project Title:

ClaimsAgent – AI-Powered Claims Assistant

Problem Statement:

Claims Adjusters face time-consuming workflows, fragmented systems, and frequent data entry errors while processing insurance claims. Existing tools lack clarity, efficiency, and real-time support.

Target Users:

- Insurance Claims Adjusters (Junior to Senior)
- High-volume or complex case handlers

UX Goals:

- Reduce manual steps in claims submission and tracking
- Increase clarity and trust in AI-assisted workflows
- Support error correction and audit trail transparency

Core User Tasks:

1. Submit a new claim quickly and accurately
2. Check claim status with clear progress feedback
3. Correct submitted claim data with audit logging
4. Upload additional documents with guidance
5. Self-serve answers to FAQs like “How do I withdraw a claim?”

Design Highlights:

- AI chatbot integrated into the claims platform
- Structured, conversational flows with chips and typed input
- Visual status timeline for claim progress
- “Edit with history” function to preserve transparency
- Guided file upload with error prevention

Simulated Usability Insights:

- Users defaulted to free text but appreciated visual guidance
- Confusion around claim status labels was reduced by visual timelines
- Clearer chip labels helped reduce task hesitation
- Adjusters valued control over AI suggestions and confirmation prompts

Anticipated Impact:

- 30–40% reduction in time spent on status checks
- Fewer claim rejections due to input errors
- Higher user confidence in correcting data independently

This content can be used to design a one-page visual summary slide or portfolio asset using a clean grid layout, icons, and concise blocks of information.