INSURANCE OPERATIONS / SOLUTION SHEET

Prepare a claim intake record from two documents

An intake specialist receives an incident notice and a repair estimate together. Reading the two as a packet helps the specialist capture the reported facts and identify exactly what to request from the submitter.

FROM SOURCE DOCUMENT TO REVIEWABLE DATA

INCOMING CLAIM PACKET

Case CL-7301

Notice	**Policy PL-4827**
Loss date	**04 Nov 2026**
Estimate	**USD 1,850.00**

INTAKE RECORD

Case	**CL-7301**
Loss date	**2026-11-04**
Estimate ref.	**EST-801**

HOW VERIXA IDP FITS THE PROCESS

Capture

Read the case, policy, incident and loss date from the notice, and the dated amount from the estimate.

Review

Check the date and reference on each page. Ask for a missing loss date before intake is completed.

Hand off

Give the intake record and source packet to a claims handler for assessment.

Try a two-page claim packet

Bring a notice form, a linked estimate and a claims intake reviewer. Compare the incident date with the estimate date and measure missing-field follow-up.