



What is Intelli-Claim?

Intelli-claim is an ASP Claims Management System built upon the Metatomix Financial Services Framework (MFSF) that employs financial services-specific claims management "ontologies," based on the W3C industry standard. The Intelli-Claim solution serves as an exchange service between all counter-parties. Each party raises their claims on the Intelli-Claim system, making all claims from all parties viewable and actionable for the specific parties involved. Each party will only see their own inbound and outbound claims.

The screenshot displays the Intelli-CLAIM web application interface. At the top, it shows the user's login information: "Welcome: hsbcc Division: HSBC ASSET MANAGEMENT (EUROPE) LTD" and a "LOG OUT" link. Below this is a navigation menu with options like "Claim Processing", "Information", "Case Well", "Create Case", "Archive", "Case Approvals", "Team Assignment", and "3rd Party View".

The main content area is divided into two sections: "INBOUND - Total: 1" and "OUTBOUND - Total: 40". Each section has a "Team List" dropdown set to "All Teams" and a search filter for "EXPORT CLAIMS" with "From:" and "Until:" fields. Action buttons for "Apply", "Clear", "Export", and "Billing Report" are present.

The "INBOUND" section contains one claim entry:

Case ID	Type	Value	CCY	Risk	Claimant Name	Status	Creation Date	Deadline Date	Matched Date
CLM20060209110251187	IC_Sec_Rcv	715.55	USD		BANKOFNEWYORK	TEAM_ASSIGNED	02/09/2006	04/10/2006	

The "OUTBOUND" section contains 13 claim entries:

Case ID	Type	Value	CCY	Risk	Counterparty Name	Status	Creation Date	Deadline Date	Matched Date
CLM20070822094115515	IC_Sec_Rcv	3,195.83	USD	0	State Street Bank and Trust Co	ALLEGED_CP_NOTI	08/22/2007	10/21/2007	
CLM20061018191628718	Stk_Rcv	80,000.00	USD	0	State Street Bank and Trust Co	CREATED	10/18/2006	12/17/2006	
CLM20061018191202515	IC_Sec_Rcv	7,437.50	USD	0	State Street Bank and Trust Co	ALLEGED_CP_NOTI	10/18/2006	12/17/2006	
CLM20061018191101359	IC_Sec_Rcv	10,625.00	USD	0	State Street Bank and Trust Co	CREATED	10/18/2006	12/17/2006	
CLM20061018190920593	Div_Rcv	23,472.00	USD	0	State Street Bank and Trust Co	CP_TEAM_ASSIGNE	10/18/2006	12/17/2006	
CLM20061018190903171	Stk_Rcv	80,000.00	USD	0	State Street Bank and Trust Co	CP_DISPUTED	10/18/2006	12/17/2006	
CLM20061018190841562	Stk_Rcv	40,000.00	USD	0	State Street Bank and Trust Co	CREATED	10/18/2006	12/17/2006	
CLM20061018190805921	Div_Rcv	22,168.00	USD	0	State Street Bank and Trust Co	ALLEGED_CP_NOTI	10/18/2006	12/17/2006	
CLM20061018190741718	Div_Rcv	11,084.00	USD	0	State Street Bank and Trust Co	CP_TEAM_ASSIGNE	10/18/2006	12/17/2006	
CLM20061018190648546	Stk_Rcv	80,000.00	USD	0	State Street Bank and Trust Co	ALLEGED_CP_NOTI	10/18/2006	12/17/2006	
CLM20061018190545609	Stk_Rcv	40,000.00	USD	0	State Street Bank and Trust Co	CREATED	10/18/2006	12/17/2006	

At the bottom of the interface, it says "powered by: metatomix" and "Copyright 2007, Metatomix. All Rights Reserved."

Intelli-Claim:

- Implements a comprehensive, rules-driven solution to facilitate the management and resolution of the often complex and problematic claims process between financial institutions.
- Provides automated issuance and management for interest claims, dividend claims, tax reclaims, corporate action claims and market buy-in claims. These claims typically result from inefficiencies in the processing of the various intricate financial transactions.



Find Data. Find Relationships. Find Meaning. Make Decisions.

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- Offers a settlement workflow system capable of replacing the current archaic methodology with a feature-rich, browser-based claims management system.
- Easily accessible through centralized Web Architecture
- Automated fax and email notification of claims to counterparties
- Browser-based user interface – no software required on user workstations
- Offers configurable dashboard alerts and notifications

Automates Claim Management

Intelli-Claim eliminates the expensive, error-prone processes associated with manual claims issuance and control. Automatic claim creation and management, integrated with sophisticated communication tools, forms the core of Intelli-Claim. This hosted, automated environment promotes industry-wide straight through processing (STP) by connecting institutions on a common platform in a centralized location. With enhanced communication between parties throughout the claim management process, users achieve a level of management insight, audit trail, and accountability not possible with the current process most financial institutions use. Intelli-Claim offers full control and accountability through claim management facilities, along with net settlement calculations and exception management.

Highly Cost-Effective

Intelli-Claim significantly reduces inefficiency and cost by enabling users to pursue claims and resolve them with minimal time and effort. Intelli-Claim can be deployed as an enterprise-wide claims data consolidation tool by combining exceptions generated across an organization. A repository of settlement records and data, control, and reporting services are available both as standard and customized services.

Customized Reports

Reports can be customized specific to your business needs. Standard reports are available such as:

- Claims by Counterparty
- Outstanding Claims by Counterparty
- Outstanding Amounts by Counterparty
- Claims by Status
- # of Days to Settle Claims
- Weekly Views or Client Level Views

Why Intelli-Claim?

metatomix®

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Frequently claims are opened, managed and settled through very manual processes that are error prone and inefficient. Intelli-Claim significantly reduces inefficiencies through a web based service that's easy to use and ultimately less costly.

It enables more claims to be settled faster.

About Metatomix

The Metatomix Semantic Platform integrates data, uncovers and defines information relationships, and provides meaning and actionable insight to applications. It does so by creating a real-time virtual integration layer that non-invasively accesses data from any source (static and dynamic) and allows it to be understood & leveraged by practically any application.

METATOMIX SNAPSHOT

- *Founded in 2000*
- *Headquarters Dedham, MA*
- *Offices in Atlanta, London, Memphis, and San Francisco*
- *4 existing patents, 4 more pending*
- *Semantic Technology Leadership*
- *Customers include: Regions Bank, ACI, Florida Courts, Ohio Supreme Court, Crisp County, GA, etc.*
- *Partners include: Agile Technologies, Ciber, Cognos, HCL, HP, IBM, Oracle, Sybase, Unisys*

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