Visibility of claims in the Claims Portal:

A guide for Claimant Representatives

The guide shows how actions taken by claim handlers affect the visibility of claims and covers the following scenarios:
1 – Claim is not allocated to a specific user
2 – Claim is allocated to a specific user
3 – RTA / EL/PL specific profiles

Scenario 1 - Claim is not allocated to a specific user

In this scenario there are two users: *Rep Handler 1* and *Rep Handler 2*.
Both are assigned the profile *CR Claim Handler*.

Rep Handler 1
(CR Claim Handler)

CNF

1. Rep Handler 1 accesses the CNF. The claim is automatically locked to Rep Handler 1.

2. While the claim is locked to Rep Handler 1, Rep Handler 2 cannot see it in the worklist.

My Worklist

Rep Handler 2
(CR Claim Handler)

3. Rep Handler 2 can see the claim using the Search.

Search

Rep Handler 2
(CR Claim Handler)

4. Rep Handler 1 can use the *Unlock* function to unlock the claim. It then becomes visible in Rep Handler 2's work list.
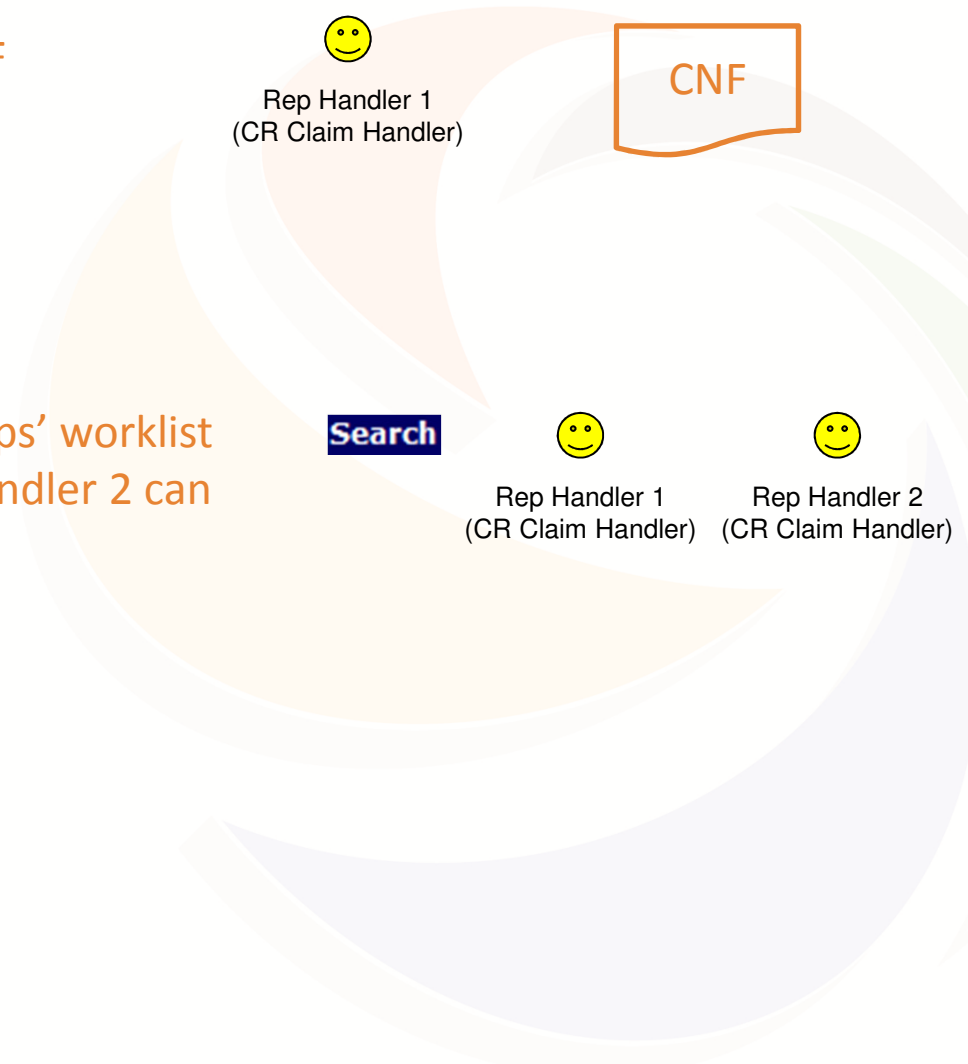
My Worklist

Rep Handler 2
(CR Claim Handler)

1. Rep Handler 1 completes the CNF and sends to the Compensator

Rep Handler 1
(CR Claim Handler)

CNF

2. The claim disappears from the reps' worklist but both Rep Handler 1 and Rep Handler 2 can find it via the Search.

Search

Rep Handler 1
(CR Claim Handler)

Rep Handler 2
(CR Claim Handler)

3. The Compensator submits the Liability decision

4. The claim appears in the reps' worklist, visible to both Rep Handler 1 and Rep Handler 2.

My Worklist

Rep Handler 1
(CR Claim Handler)

Rep Handler 2
(CR Claim Handler)

Scenario 2 - Claim allocated to specific CR user

In this scenario a CR Team Leader uses the functionality to assign a claim to a user.
In addition to *Rep Handler 1* and *Rep Handler 2*, there are two *CR Team Leaders*: *Rep Team leader 1* and *Rep Team Leader 2*.

1. When the claim is with the Claimant Rep, a Team Leader can allocate the claim to a user (for example Rep Handler 2).

2. The claim only appears in Rep Handler 2's work list.

3. Other Rep Handlers and Team Leaders can find the claim via Search.

4. Rep Handler 2 works on the claim and sends the claim to the compensator.

Rep Team Leader 1
(CR Team Leader)

My Worklist

Rep Handler 1
(CR Claim Handler)

Rep Handler 2
(CR Claim Handler)

Search

Rep Team Leader 1
(CR Team Leader)

Rep Handler 1
(CR Claim Handler)
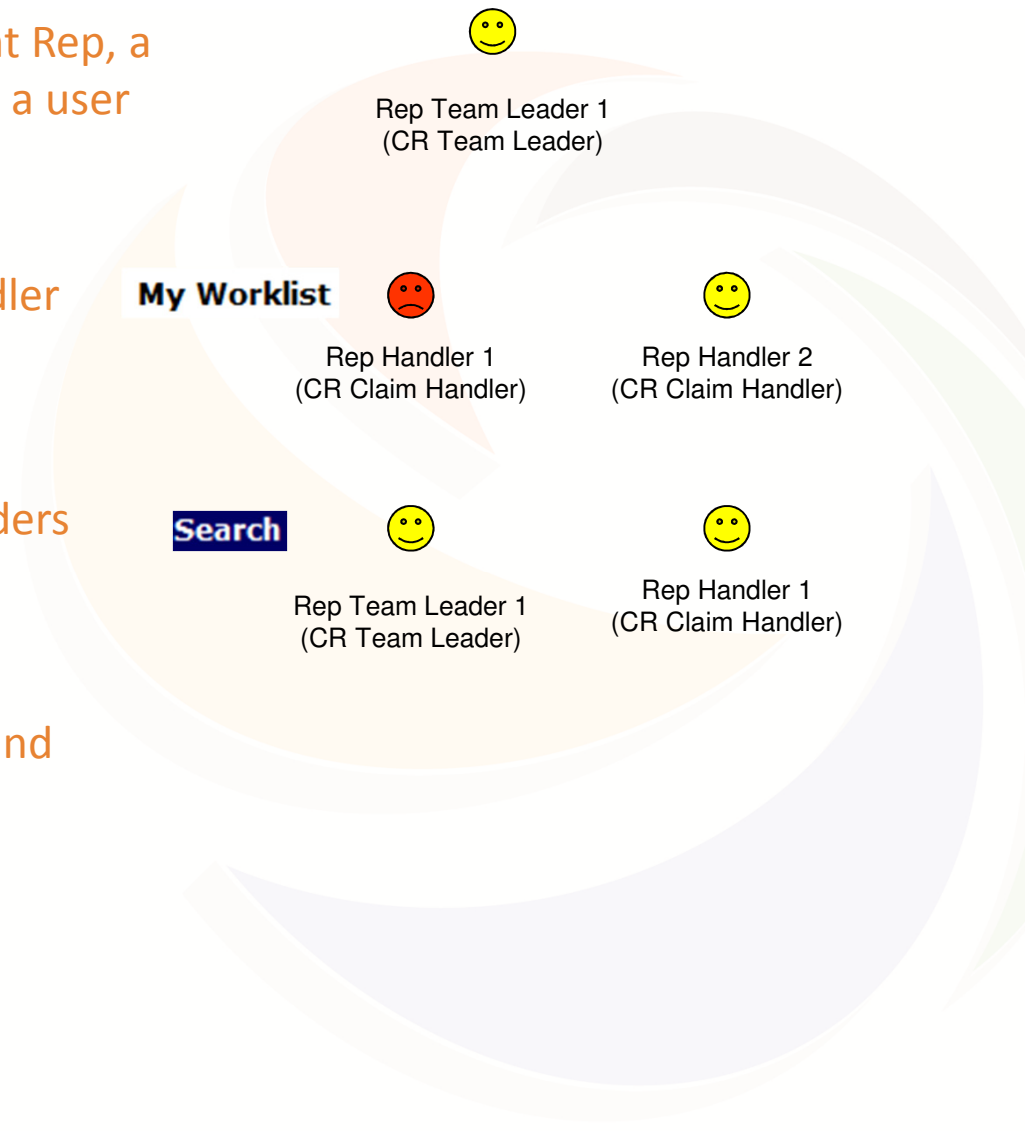
5. When the compensator responds, the claim will only appear in Rep Handler 2's worklist and not in anybody else's worklist.

6. All Rep Handlers and Team Leaders can find the claim via the Search.

7. Only Rep Handler 2 can remove the allocation by *De-allocating* the claim and unlocking it.
The claim will then appear in the worklist for both Handlers and Team Leader(s).

8. Any Team Leader can use the *Login as another User* function from the *Tools* menu to access the claim and re-assign it.

My Worklist

| Rep Handler 1 (CR Claim Handler) | Rep Handler 2 (CR Claim Handler) |

Search

| Rep Handler 1 (CR Claim Handler) | Rep Team Leader 1 (CR Team Leader) |
| Rep Handler 2 (CR Claim Handler) | Rep Team Leader 2 (CR Team Leader) |

My Worklist

| Rep Handler 1 (CR Claim Handler) | Rep Handler 2 (CR Claim Handler) |
| Rep Team Leader 1 (CR Team Leader) | Rep Team Leader 2 (CR Team Leader) |

Scenario 3 – RTA / EL/PL specific profiles

This scenario shows the restrictions that apply if your profile is a RTA or EL/PL specific profile.
Rep Handler 1 and *Team Leader 1* have no restrictions as they are assigned the *CR Claim Handler* and *CR Team Leader* profiles respectively.
Rep Handler 2 and *Team Leader 2* have been assigned the **RTA** specific profiles, while *Rep Handler 3* and *Team Leader 3* have been assigned the **EL/PL** specific profiles.

The RTA and EL/PL specific profiles work in the same way as the CR Claim Handler and CR Team Leader profiles. The only difference is that the visibility is restricted to RTA or EL/PL claims only.

RTA

Rep Handler 1
(CR Claim Handler)

Rep Team Leader 1
(CR Team Leader)

Rep Handler 2
(CR **RTA** Claim Handler)

Rep Team Leader 2
(CR **RTA** Team Leader)

Rep Handler 3
(CR **EL/PL** Claim Handler)

Rep Team Leader 3
(CR **EL/PL** Team Leader)

EL/PL

Rep Handler 1
(CR Claim Handler)

Rep Team Leader 1
(CR Team Leader)

Rep Handler 2
(CR **RTA** Claim Handler)

Rep Team Leader 2
(CR **RTA** Team Leader)

Rep Handler 3
(CR **EL/PL** Claim Handler)

Rep Team Leader 3
(CR **EL/PL** Team Leader)