Visibility of claims in the Claims Portal:

From Release 5
29 November, 2016

A guide for Compensators

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 specific Branch
3 – Claim is accepted by a Comp Branch Claim Handler
4 – Claim response is returned to the Claimant Representative
5 – Claim response is allocated to a specific claim handler
6 – RTA / EL/PL specific Claim Handler & Team Leader profiles
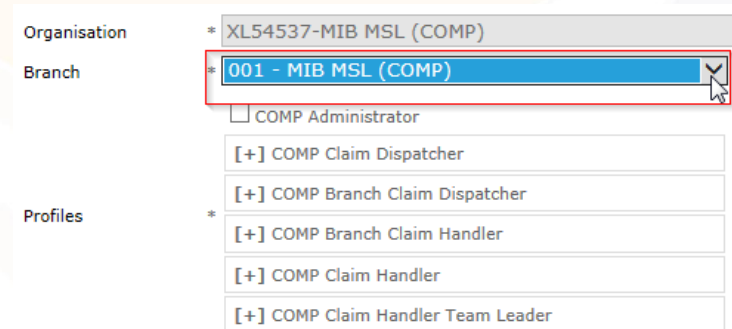7 – RTA / EL/PL specific Dispatcher profiles

Introduction

Here is a visual overview of the Release 5 changes that affects the visibility of how compensators may view and work on claims depending on their profile.

First there are a few terms you should understand…

Definition of Terms

Assigned Branch

Every user profile must be assigned to a branch, even if their profile is not a branch restricted one.

Organisation	*	XL54537-MIB MSL (COMP)
Branch	*	001 - MIB MSL (COMP)
		☐ COMP Administrator
		[+] COMP Claim Dispatcher
		[+] COMP Branch Claim Dispatcher
Profiles	*	[+] COMP Branch Claim Handler
		[+] COMP Claim Handler
		[+] COMP Claim Handler Team Leader

Definition of Terms continued…

View claim

Being able to view a claim means you:

- Can search for and have results returned for a claim using the 'Search' function

- Can view the claim details in 'read only' mode by clicking the 'View Process Details' icon
- This function is shown using this image: **Search**
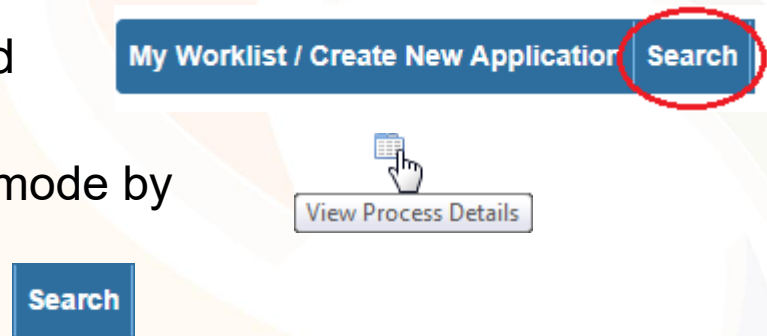
Work on a claim

- You can work on a claim if you can access it from your Worklist and can open the activity and work on it.
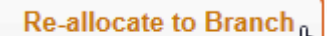- This function is shown using this image: **My Worklist**
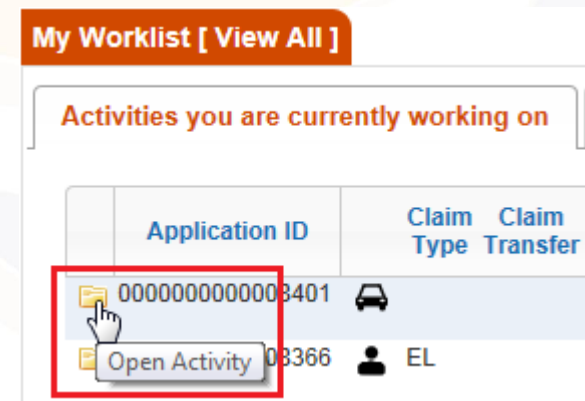
Definition of Terms continued…

Allocated Branch
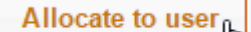
Compensators may allocate a claim to a specific branch to place the claim into different teams within the Portal, to reflect different departments, geographies, responsibilities and/or scope of work.

Re-allocate to Branch

Allocated to User

Users with a Team Leader profile can choose to allocate a claim to a specific handler. The claim is then only visible in the Worklist of this handler. It is still possible for other users to locate the claim via the Search function.

Allocate to user

Visibility Key

for the scenarios on the following slides

A user that can search for, view, and work
on a claim are shown like this:

A user that can search for and view a claim,
but <u>not</u> work on it are shown like this:

A user that cannot search for, view or work
on a claim are shown like this:

Scenario 1 – A CNF is not allocated to a specific user

- In this scenario there are two branches. A CNF is sent to the Compensator and it is automatically allocated by the system to Branch 1, the 'Central Point', but not to a specific user
- **Please note** that all profiles in these scenarios are Compensator specific unless indicated otherwise. The abbreviation 'Comp' that usually displays before each profile description has been omitted due to space restrictions.

Scenario 1
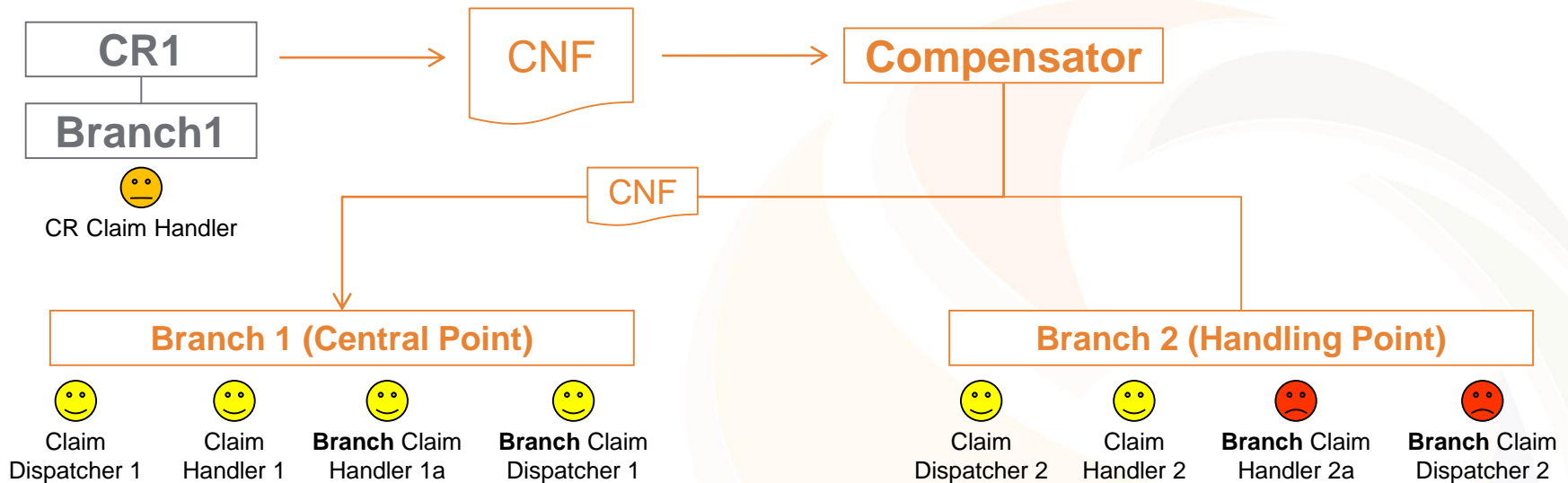
Claim Dispatchers

- "Claim Dispatcher 1" and "Claim Dispatcher 2" can view and work on the claim because their profiles are not branch restricted.

- "**Branch** Claim Dispatcher 1" can view and work on the claim because it is allocated to Branch 1, which is the branch they are assigned to.

- "**Branch** Claim Dispatcher 2" cannot view or work on the claim because it is allocated to Branch 1, and they are assigned to Branch 2

Claim Handlers

- "Claim Handler 1" and "Claim Handler 2" can view and work on the claim because their profiles are not branch restricted.

Scenario 1 continued
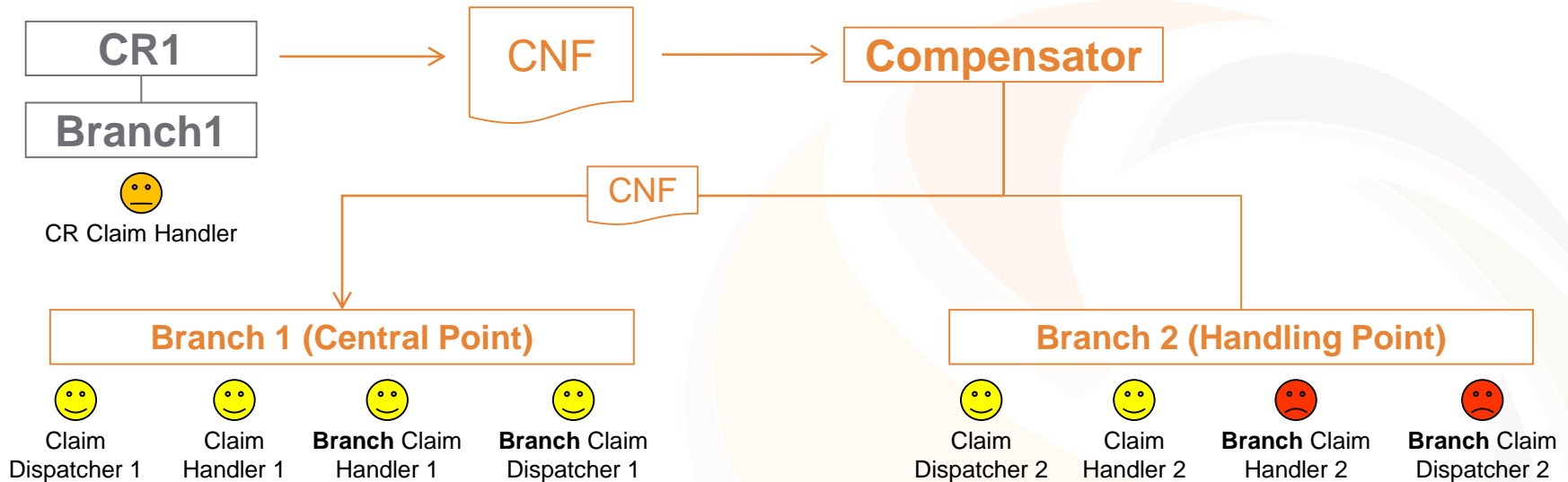
Claim Handlers continued…

- "**Branch** Claim Handler 1a" can view and work on the claim because it is allocated to Branch 1, which is the branch they are assigned to.

- "**Branch** Claim Handler 2a" cannot view or work on the claim because it is allocated to Branch 1, and they are assigned to Branch 2

Claimant Representative Claim Handler

- The CR Claim Handler cannot work on the claim because it has been sent to the Compensator. They may not perform any other activities on the claim while the claim is held by a compensator but they can view a read only version of the claim by accessing it from the search results.

Scenario 2 – The CNF is allocated to another branch

- In this scenario there are two branches. A CNF is allocated from Branch 1 to Branch 2 by a <u>Branch</u> Claim Handler
- **Please note** that all profiles in these scenarios are Compensator specific unless indicated otherwise. The abbreviation 'Comp' that usually displays before each profile description has been omitted due to space restrictions.

Scenario 2

CR1
Branch1

🙂
CR Claim Handler

Compensator

Branch 1 (Central Point)

🙂 Claim Dispatcher 1   🙂 Claim Handler 1   🔴 **Branch** Claim Handler 1a   🔴 **Branch** Claim Dispatcher 1

CNF

Branch 2 (Handling Point)

🙂 Claim Dispatcher 2   🙂 Claim Handler 2   🙂 **Branch** Claim Handler 2a   🙂 **Branch** Claim Dispatcher 2

Claim Dispatchers

- "Claim Dispatcher 1" and "Claim Dispatcher 2" can view and work on the claim because their profiles are not branch restricted.

- "**Branch** Claim Dispatcher 2" can now view and work on the claim because it has been allocated to Branch 2, which is the branch they are assigned to.

- "**Branch** Claim Dispatcher 1" can no longer view or work on the claim because it is allocated to Branch 2, and they are assigned to Branch 1
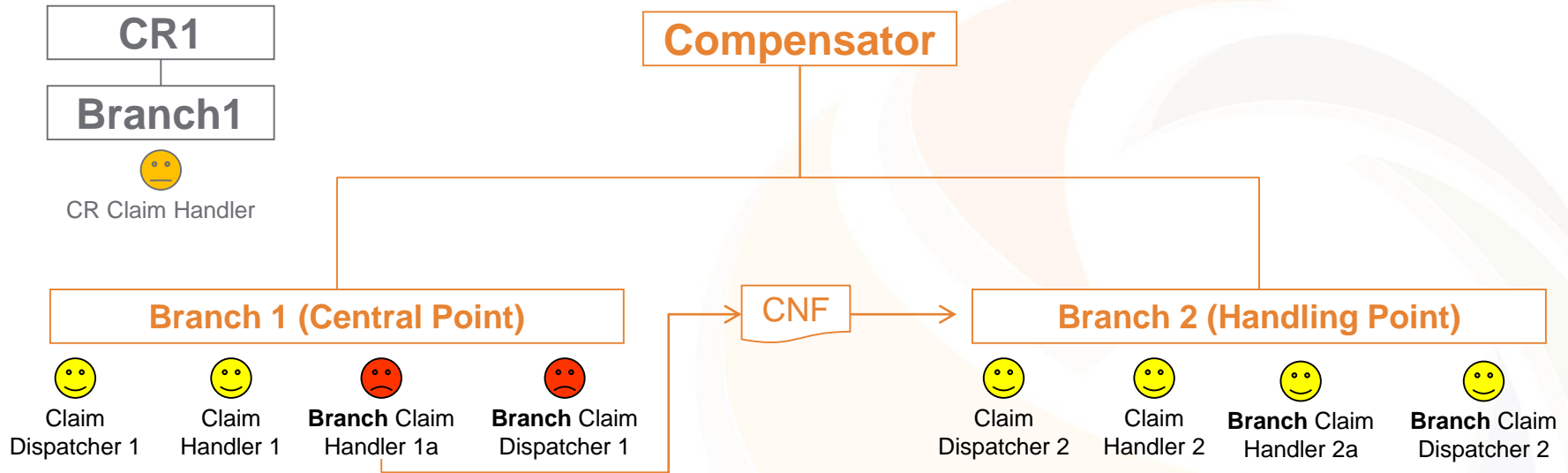
Claim Handlers

- "Claim Handler 1" and "Claim Handler 2" can view and work on the claim because their profiles are not branch restricted.

Scenario 2 continued
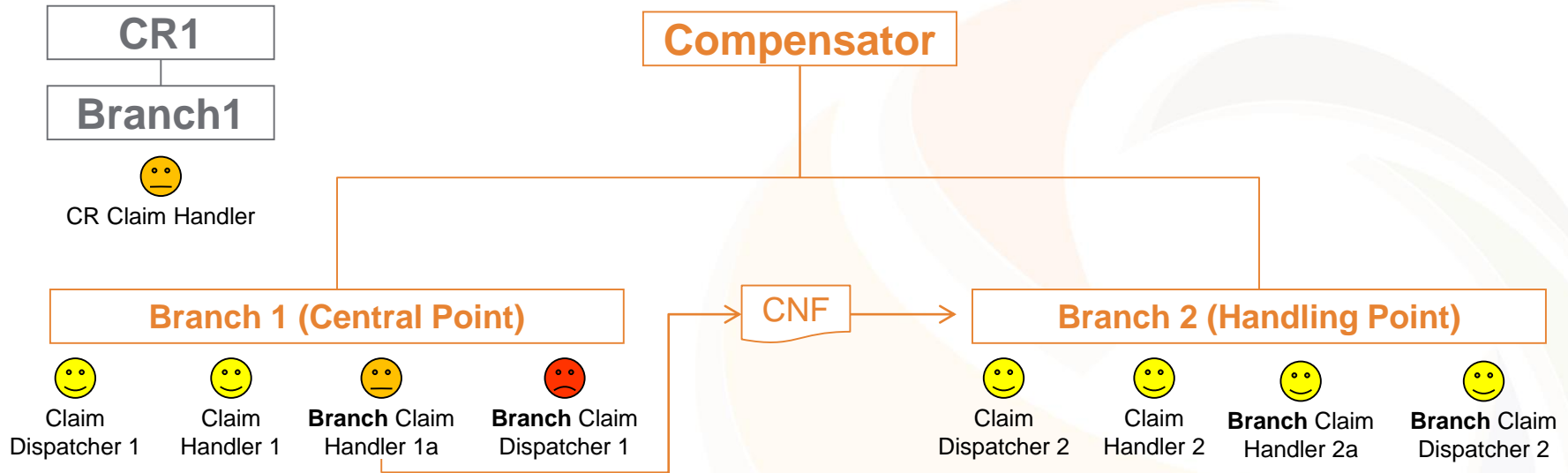
Claim Handlers continued…

- "**Branch** Claim Handler 1a", can search for, view and work on the claim, even though it is no longer allocated to the branch they're assigned to because they previously worked on it.

- "**Branch** Claim Handler 2a" can now view and work on the claim because it is allocated to Branch 2, the Branch they are assigned to.

Claimant Representative Claim Handler

- The CR Claim Handler cannot work on the claim because it has been sent to the Compensator. They may not perform any other activities on the claim while the claim is held by a compensator but they can view a read only version of the claim by accessing it from the search results.

Scenario 3 – A claim is accepted by a Branch Claim Handler

- There are two branches in this scenario. A CNF is accepted by a <u>Branch Claim Handler in Branch 2</u>
- **Please note** that all profiles in these scenarios are Compensator specific unless indicated otherwise. The abbreviation 'Comp' that usually displays before each profile description has been omitted due to space restrictions.

Scenario 3
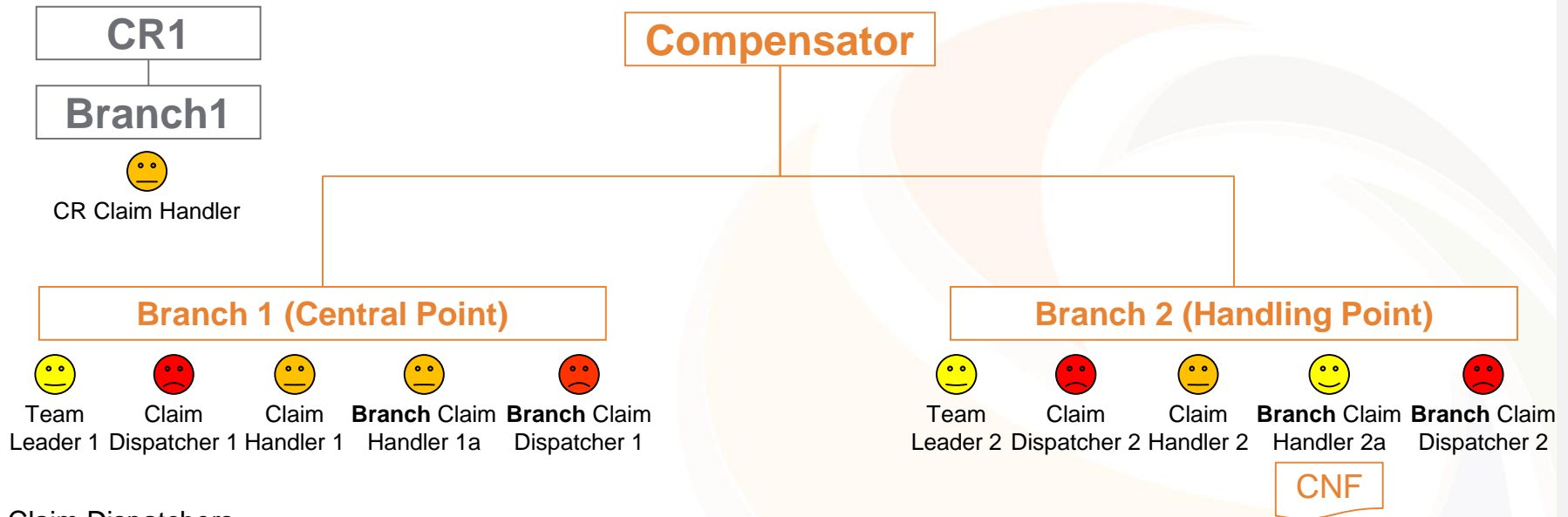
Claim Dispatchers

- All "Claim Dispatcher" profiles will no longer be able to view or work on the claim because now that it has been accepted their job is complete.

Claim Handlers

- "Claim Handler 1" and "Claim Handler 2" can view the claim because their profiles are not branch restricted, but cannot work on it because it is locked to Branch Claim Handler 2 while they are working on it.

- "**Branch** Claim Handler 1a", who re-allocated the claim to Branch 2, can search for and view the claim because they previously worked on it, but cannot work on it because it is locked to Branch Claim Handler 2 while they are working on it.

- "**Branch** Claim Handler 2a" has accepted the claim and is working on it, which means that while other users can view the claim, they cannot work on it.

Scenario 3 continued
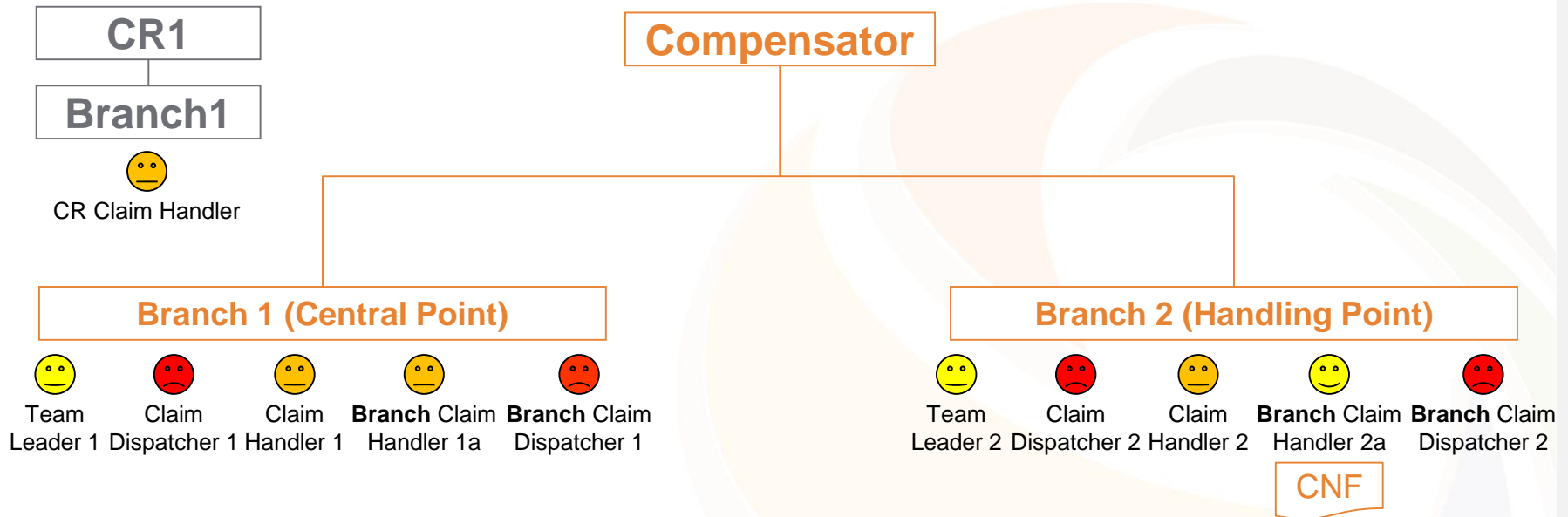
Team Leaders

- "Team Leader" profiles are able to search for and view the claim because their profiles are not branch restricted, but cannot work on it because it is locked to Branch Claim Handler 2 while they are working on it. As Team Leaders they can use the "Login As" function to login as Branch Claim Handler 2a to work on the claim.

Claimant Representative Claim Handler

- The CR Claim Handler cannot work on the claim because it has been sent to the Compensator. They may not perform any other activities on the claim while the claim is held by a compensator but they can view a read only version of the claim by accessing it from the search results.

Scenario 4 – A claim response is returned to the Claimant Representative

- There are two branches in this scenario. A CNF has been accepted by a <u>Branch</u> Claim Handler in Branch 2 the response is returned to the Claimant Representative.
- The extended visibility of the claim while it is with the Claimant Representative is new from Release 5.
- **Please note** that all profiles in these scenarios are Compensator specific unless indicated otherwise. The abbreviation 'Comp' that usually displays before each profile description has been omitted due to space restrictions.

Scenario 4
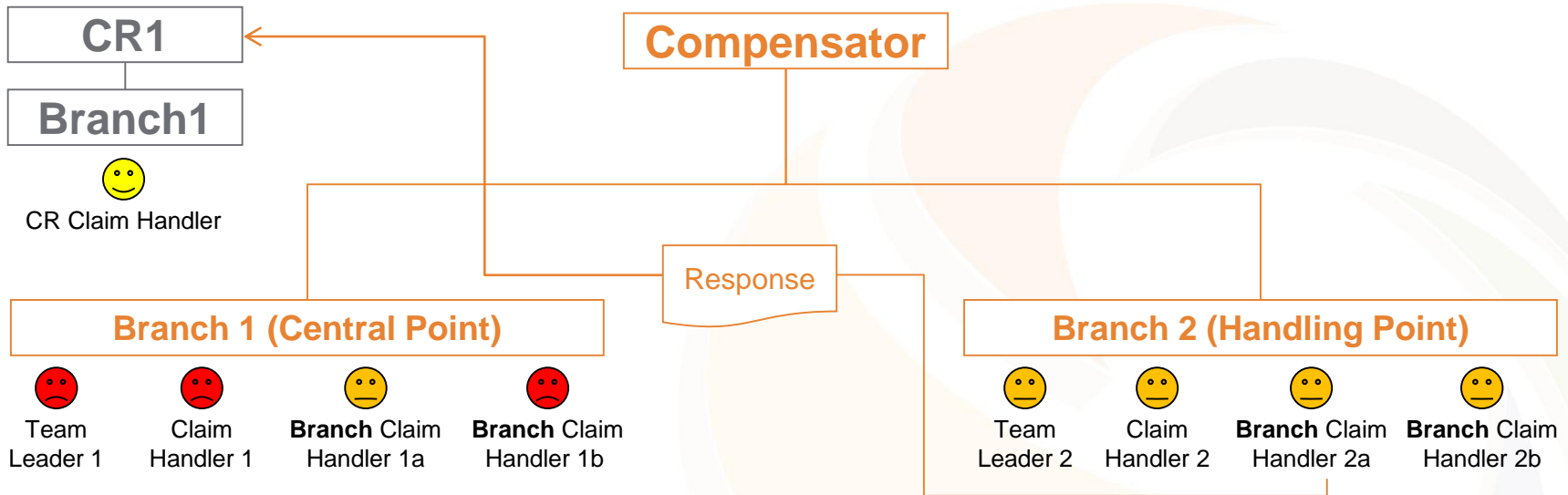
Claim Handlers

- "Claim Handler 1" cannot search for, view or work on the claim while it is with the Claim Representative because the claim was allocated to Branch 2 and their user profile is assigned to Branch 1.

- "**Branch** Claim Handler 1a", who re-allocated the claim to Branch 2, can search for and view the claim because they previously worked on it, but cannot work on it while it is with the Claimant Representative.

- "**Branch** Claim Handler 1b" cannot search for, view or work on the claim while it is with the Claim Representative, because their profile is branch restricted to Branch 1 and the claims was allocated to Branch 2.

- "Claim Handler 2" can search for and view the claim because their profiles are not branch restricted, but cannot work on it because it is with the Claimant Representative.

- "**Branch** Claim Handler 2a" and "2b" can search for and view the claim because the claim was allocated to Branch 2 but cannot work on it because it is with the Claimant Representative.
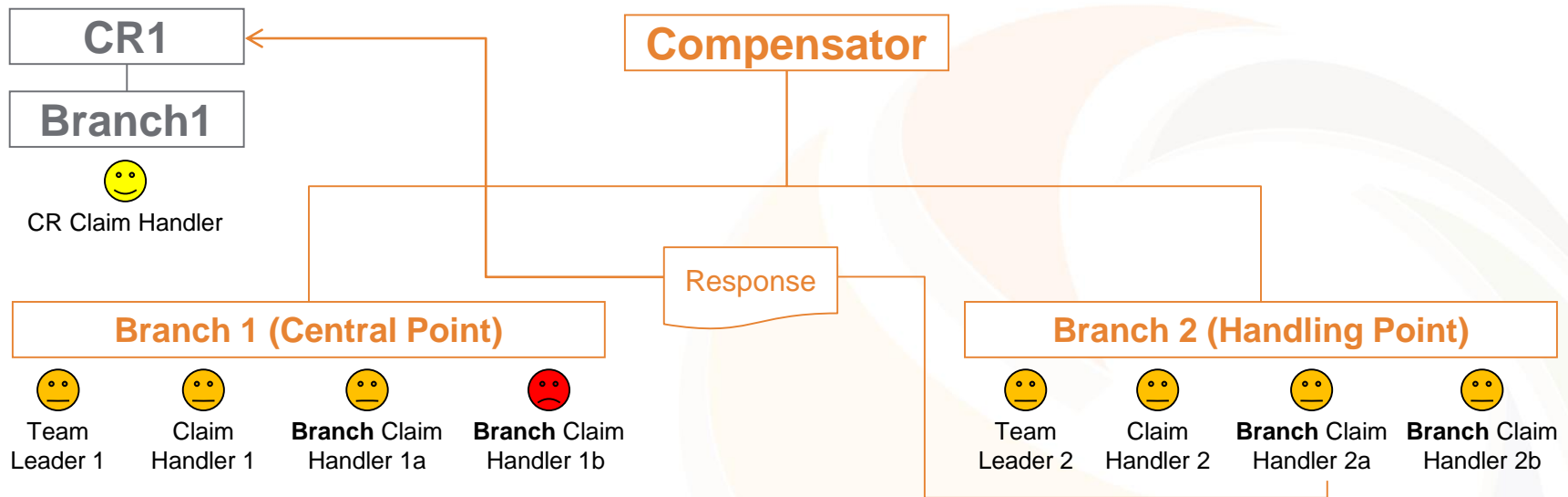
Scenario 4 continued

Team Leaders

- "Team Leader 1" cannot search for, view or work on the claim while it is with the Claim Representative because the claim was allocated to Branch 2 and their user profile is assigned to Branch 1.

- "Team Leader 2" can search for and view the claim was allocated to the branch they are assigned to, Branch 2, but cannot work on it because it is with the Claimant Representative.

Claimant Representative

- Users in the Claimant Representative organisation, including the CR Claim Handler, can now work on the claim because it has been sent back to them. They may search for, view and work on the claim to progress it to the next phase.

Scenario 5 – A claim response is returned to the Compensator where it is allocated to a specific Claim Handler

- There are three branches in this scenario. A Claim is automatically returned to the Compensator Branch 2, by the Portal, from the Claimant Representative.
- The Team Leader in Branch 2 allocates the claim to Branch Claim Handler 1a in Branch 1, who had previously worked on the claim.
- **Please note** that all profiles in these scenarios are Compensator specific unless indicated otherwise. The abbreviation 'Comp' that usually displays before each profile description has been omitted due to space restrictions.

Scenario 5
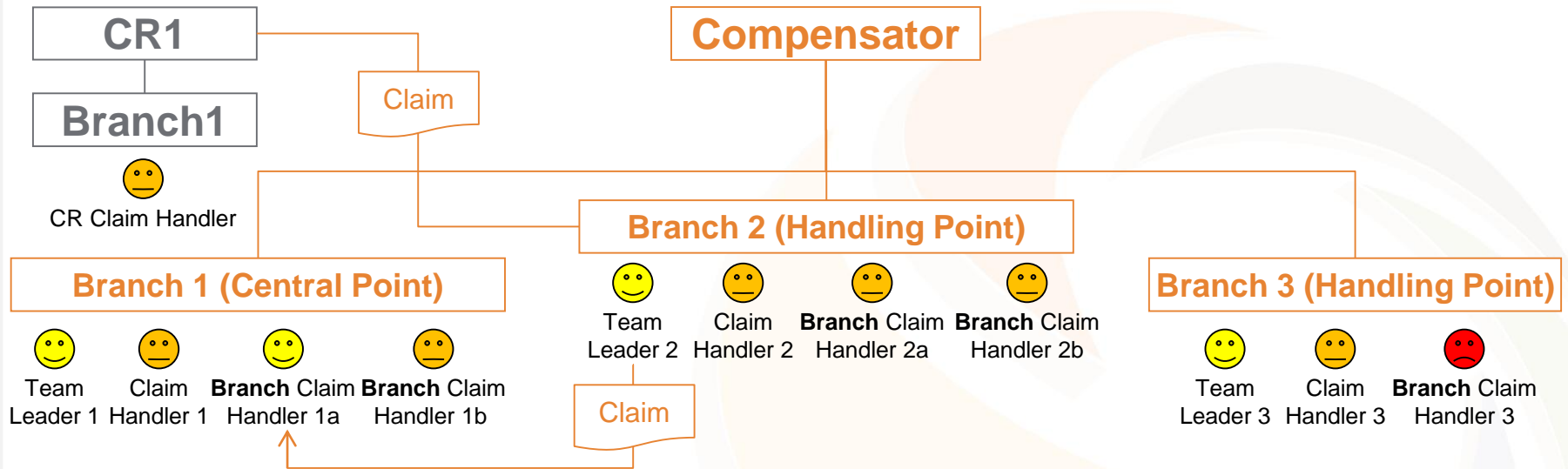
Claim Handlers

- "Claim Handler 1", "2" and "3" can search for and view the claim because their profiles are not branch restricted, but cannot work on it because it has been specifically allocated to "**Branch** Claim Handler 1a".

- "**Branch** Claim Handler 2a" and "2b", can search for and view the claim because the claim is allocated to Branch 2 , but cannot work on it because the claim was specifically allocated to "**Branch** Claim Handler 1a".

- "**Branch** Claim Handler 1a" can search for, view, see the claim in their Worklist and work on it because the claim has been specifically allocated to them by "Team Leader 2"

- "**Branch** Claim Handler 1b" can search for and view the claim but cannot work on it, even though they have a branch restricted profile and the claim is allocated to Branch 2, because the claims was specifically allocated to "**Branch** Claim Handler 1a" who is assigned to the same branch as them, Branch 1.

- "**Branch** Claim Handler 3" cannot search for, view or work on the claim because it's allocated to Branch 2 and their profile is branch restricted to Branch 3

Scenario 5 continued
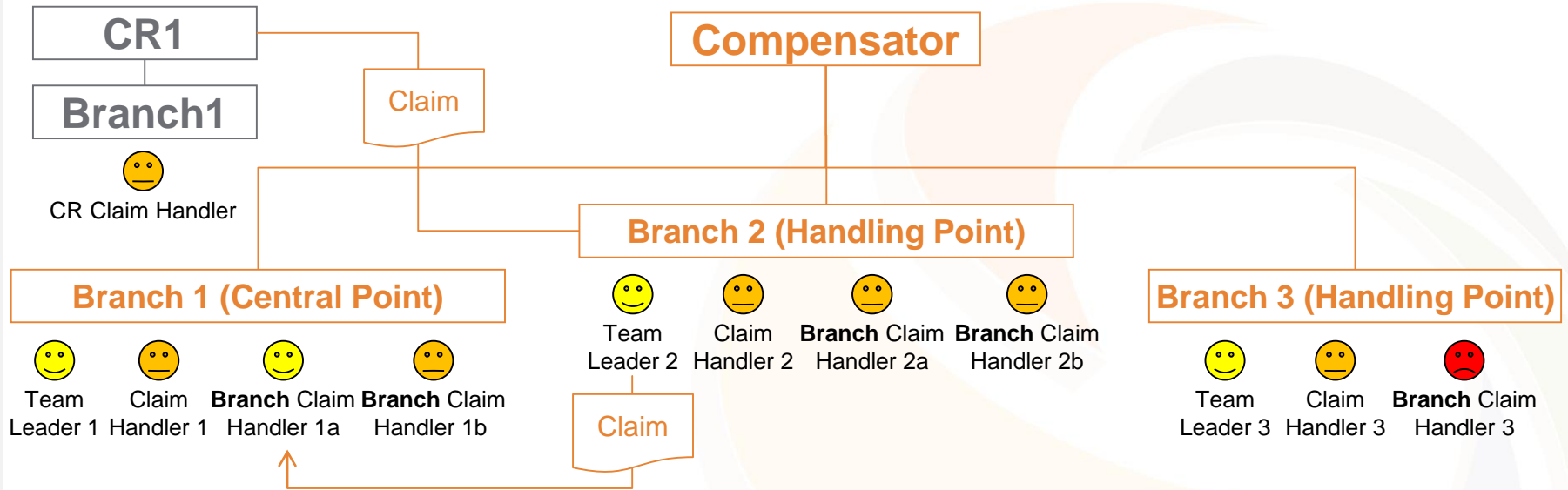
Team Leaders

- "Team Leader 1" "2" and "3" can search for and view the claim because their profiles are not branch restricted. They can reallocate it or work on it using the "Log-in As" option as these are functions of their profile.

Claimant Representative

- The CR Claim Handler cannot work on the claim because it has been sent to the Compensator. They may not perform any other activities on the claim while the claim is held by a compensator but they can view a read only version of the claim by accessing it from the search results.

The next two scenarios outline visibility when profiles are claim type specific

Scenario 6 – RTA / EL/PL specific profiles

- This scenario shows the restrictions that apply if your profile is a RTA or EL/PL specific profile.
- *Comp Handler 1* and *Comp Team Leader 1* are assigned the *COMP Claim Handler* and *COMP Claim Handler Team Leader* profiles respectively. This means that they have access to RTA and EL/PL claims.
- *Comp Handler 2* and *Comp Team Leader 2* have been assigned the **RTA** specific profiles, while *Comp Handler 3* and *Comp Team Leader 3* have been assigned the **EL/PL** specific profiles. Therefore they can only see RTA or EL/PL claims.

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

RTA

Comp Handler 1
(COMP Claim
Handler)

Comp Team Leader 1
(COMP Claim
Handler
Team Leader)

Comp Handler 2
(COMP **RTA**
Claim Handler)

Comp Team Leader 2
(COMP **RTA**
Claim Handler
Team Leader)

Comp Handler 3
(COMP **EL/PL**
Claim Handler)

Comp Team Leader 3
(COMP **EL/PL**
Claim Handler
Team Leader)

EL/PL

Comp Handler 1
(COMP Claim
Handler)

Comp Team Leader 1
(COMP Claim
Handler
Team Leader)

Comp Handler 2
(COMP **RTA**
Claim Handler)

Comp Team Leader 2
(COMP **RTA**
Claim Handler
Team Leader)

Comp Handler 3
(COMP **EL/PL**
Claim Handler)

Comp Team Leader 3
(COMP **EL/PL**
Claim Handler
Team Leader)

EL/PL CNF

➡️ Branch 001 – Central point

1. Dispatcher 1 *acknowledges* the claim and allocates it to branch 002. The claim **remains** in Dispatcher 1's worklist, as he/she is a *COMP Claim Dispatcher* with visibility of <u>all</u> claims in <u>all</u> branches until accepted.

➡️ Branch 002

My Worklist 🙂
Dispatcher 1
branch 001
(COMP Claim
Dispatcher)

2. Dispatcher 3 is a *COMP **Branch Claim Dispatcher*** assigned to branch 001. As the claim is with branch 002, the claim has disappeared from Dispatcher 3's work list.

My Worklist ☹️
Dispatcher 3
branch 001
(COMP Branch
Claim Dispatcher)

3. The claim is visible in Dispatcher 4's worklist as he/she is a *COMP **Branch Claim Dispatcher*** assigned to branch 002.

My Worklist 🙂
Dispatcher 4
branch 002
(COMP Branch
Claim Dispatcher)

4. Dispatcher 4 *accepts* the claim.

5. The claim disappears from the worklists of all Dispatchers, as the claim is accepted.

6. Dispatcher 1 and Dispatcher 4 can still find the claim via Search, as they have both worked on it. No other dispatchers can find it.

My Worklist

Dispatcher 1
branch 001
(COMP Claim
Dispatcher)

Dispatcher 2
branch 002
(COMP Claim
Dispatcher)

Dispatcher 3
branch 001
(COMP Branch
Claim Dispatcher)

Dispatcher 4
branch 002
(COMP Branch
Claim Dispatcher)

Search

Dispatcher 1
branch 001
(COMP Claim
Dispatcher)

Dispatcher 2
branch 002
(COMP Claim
Dispatcher)

Dispatcher 3
branch 001
(COMP Branch
Claim Dispatcher)

Dispatcher 4
branch 002
(COMP Branch
Claim Dispatcher)

Scenario 7 – RTA / EL/PL specific Dispatcher profiles

- The use of the RTA and EL/PL specific profiles is shown in this scenario.
- *Dispatcher 1* and *Dispatcher 2* can both view and accept both RTA and EL/PL claims.
- *Dispatcher 3* and *Dispatcher 4* are assigned the RTA specific profiles, and Dispatcher 5 and Dispatcher 6 are assigned the EL/PL specific profiles. This restricts the access to RTA and EL/PL claims respectively.

The RTA and EL/PL specific profiles work in the same way as the *COMP Claim Dispatcher* and *COMP Branch Claim Dispatcher* profiles. The only difference is that the visibility is restricted to RTA or EL/PL claims only. (In this example, **the claims are in the same branch as the users**.)

RTA

EL/PL

Dispatcher 1
(COMP Claim
Dispatcher)

Dispatcher 2
(COMP Branch
Claim Dispatcher)

Dispatcher 1
(COMP Claim
Dispatcher)

Dispatcher 2
(COMP Branch
Claim Dispatcher)

Dispatcher 3
(COMP **RTA** Claim
Dispatcher)

Dispatcher 4
(COMP **RTA** Branch
Claim Dispatcher)

Dispatcher 3
(COMP **RTA** Claim
Dispatcher)

Dispatcher 4
(COMP **RTA** Branch
Claim Dispatcher)

Dispatcher 5
(COMP **EL/PL** Claim
Dispatcher)

Dispatcher 6
(COMP **EL/PL** Branch
Claim Dispatcher)

Dispatcher 5
(COMP **EL/PL** Claim
Dispatcher)

Dispatcher 6
(COMP **EL/PL** Branch
Claim Dispatcher)