

RTA Web User Release 3 Notes

Project Name: Release 3

Version No.	1.0 Issue
Release Date	22/05/2013

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Version History

Release Date	Version	Description
22/05/2013	1.0	Issued

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1. Introduction

1.1 Overview

This document provides an overview of the key changes that existing Web Users of the Claims Portal (the Portal) will see following the go-live date of Release 3 (31st July 2013).

This document describes the changes affecting existing RTA Web Users. It does not describe the new EL/PL process.

Release 3 includes the following changes:

- To allow for the Vertical expansion of RTA claims up to £25,000
- To allow for the Horizontal expansion by introducing a new process for EL/PL claims up to £25,000
- Some minor changes to remove the need for workarounds

Users should familiarise themselves with the changes prior to the Go Live date using their training accounts.



Changes described in this document only apply to claims created on or after Release 3 go live date of 31st July 2013.

Please note:

- The version of the Portal released in April 2010 is referred to as Release 0.
- The version of the Portal released in March 2011 is referred to as Release 1.
- The version of the Portal released in September 2012 is referred to as Release 2.

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1.2 Summary of changes included in Release 3

A summary of the changes included in Release 3 can be found below.

1. Stage 1 costs:
 - a. To move the time for paying Stage 1 costs from Liability decision to Stage 2 Settlement pack
2. Interim Settlement Packs:
 - a. Allow multiple Interim Settlement Packs (ISP)
 - b. Amended validation of initial ISPs, so that General damages (PSLA) no longer is mandatory
 - c. Amended behaviour relating to timed out ISPs
3. Loss types:
 - a. General Damages replaced by new loss types, including PSLA
4. Changes to CNF entry and printable document to align with new MoJ forms and new protocol
5. Changes to Interim Settlement Packs, Stage 2 Settlement Packs and Court Proceedings Packs entry and printable documents to align with new MoJ forms and new protocol
6. Changes to Court Proceedings Pack entry to allow for values to be edited and therefore remove the need for work-around
7. New user profiles to restrict access by claim type
8. A new function for Administrators to view their own organisation's structure

1.3 How to use this Document

This document provides an overview of the key changes introduced by Release 3. It is recommended that you take time to carry out a full review of the changes from both the Claimant Representative and Compensator view.

This will provide you with a better understanding of how the changes impact the way the Portal works.

However, if you wish to focus on the changes relevant to your part of the workflow, each section contains the initials **CR** (Claimant Representative) and/or **COMP** (Compensator). This indicates which user the section/subsection is most relevant to.

2. Look & Feel (CR & COMP)

2.1 Log in screen

The Portal has been updated to reflect the rebranding to Claims Portal:



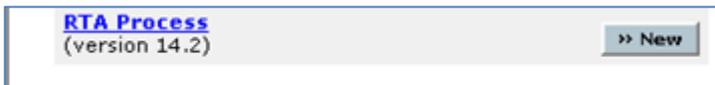
The Section in the Login box has been renamed from **Rapid Claim Settlement** to **Claims Portal** as shown below:

The screenshot shows a login form with an orange 'Login' button at the top. Below it are input fields for 'User:' and 'Password:'. A 'Section:' dropdown menu is set to 'Claims Portal'. At the bottom is a grey 'Login' button.

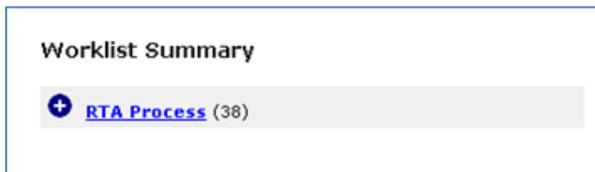
2.2 The 'Dashboard'

The 'Dashboard' has been updated to allow for EL/PL. This also affects RTA users in a small way:

- The button for creating new claims available to the Claimant Representative is renamed from **Personal Injury Process** to **RTA Process**:



- The Worklist Summary has been renamed from **Personal Injury Process** to **RTA Process**. The list is expandable as shown below:



- A new icon is displayed in My Worklist and in the Search screens; a column for EL/PL Claim type is displayed – for RTA claims this will always be empty:

My Worklist [[View All](#)]

Activities you are currently working on

No Business Process is available yet

Other Activities on your Worklist

Application ID	Claim Type	CR Ref. number	Comp Ref. number	Version	Claimant name	Application Status	Allocated CR user	Allocated COMP user
0000000000005650		test		14.1	test, test	Claim Submitted		
0000000000005410		test		13.7	test, test	Claim Submitted		
0000000000005404		test		13.7	test, test	Claim Submitted		

- The drop-down menu for the Business process filter on the Search screen has been renamed from **Personal Injury Process** to **RTA Process**:

Search Applications

Online Archived

Search Criteria

Application ID:

Main Applicant:

Application Owner: [Helpup](#)

Organization: [Helpup](#) [Clear](#)

Display 10 applications per page

Order by Start Date Asc Desc

Business Process

All Business Processes

All Business Processes

EL/PL Process

RTA Process

Current Activity:

Process Status

All Process Statuses

Application Start Date (dd/MM/yyyy)

From 22/04/2013 to 21/06/2013

Additional Filters

Select a Business Process to get additional search criteria

- A Help link has been added to the toolbar as shown below. This opens a new window with the Claims Portal website where you can view the user guides or use the Search function.



3. Administration of Profiles (CR & COMP)

3.1 Overview

With Release 3, organisations can add claim types for processing personal injury claims in Employers' Liability and Public Liability (EL/PL) as well as RTA claims.

Existing users of the Claims Portal automatically have RTA claims type added to their account.

In order for organisations to control access for their users to RTA and EL/PL, the profiles have changed for both CRs and COMP. For organisations that continue to process RTA claims only, this change still has an impact.

Administrators' roles do not change.



It is important that Administrators familiarise themselves with the new profiles using the Administrators User guide on the Claims Portal website.

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A brief overview of the changes to the profiles can be found in the following two sections.

3.2 Claimant Representative profiles (CR)

In Release 2, the following two profiles were available to CR:

- CR Claim Handler
- CR Team Leader

In Release 3, the following profiles have been created:

- CR RTA Claim Handler
- CR RTA Team Leader
- CR EL/PL Claim Handler
- CR EL/PL Team Leader

These new profiles still have the same functionality as the existing profiles, with the exception that access is restricted to RTA claims or EL/PL only.

If an organisation is enabled for both RTA and EL/PL, a CR Claim Handler will be able to create and process both RTA and EL/PL claims. A CR RTA Claim Handler will only be able to create and process RTA claims, and a CR EL/PL Claim will only be able to create and process EL/PL claims.



During implementation of Release 3, existing CR profiles will be 'converted' to the corresponding new RTA profile (eg. CR Claim Handler to CR RTA Claim Handler).

3.3 Compensator profiles (COMP)

In Release 2, the following five profiles were available to a COMP organisation:

- COMP Claim Handler
- COMP Claim Handler Team Leader
- COMP Branch Claim Handler
- COMP Claim Dispatcher
- COMP Branch Claim Dispatcher

In Release 3, the following profiles have been created:

- COMP RTA Claim Handler
- COMP RTA Claim Handler Team Leader
- COMP RTA Branch Claim Handler
- COMP RTA Claim Dispatcher
- COMP RTA Branch Claim Dispatcher
- COMP EL/PL Claim Handler
- COMP EL/PL Claim Handler Team Leader

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- COMP EL/PL Branch Claim Handler
- COMP EL/PL Claim Dispatcher
- COMP EL/PL Branch Claim Dispatcher

These new profiles still have the same functionality as the existing profiles, with the exception that access is restricted to RTA claims or EL/PL only.

If an organisation is enabled for both RTA and EL/PL, a COMP Claim Handler/Dispatcher will be able to process both RTA and EL/PL claims. A COMP RTA Claim Handler/Dispatcher will only be able to process RTA claims, and a COMP EL/PL Claim Handler/Dispatcher will only be able to process EL/PL claims.



During implementation of Release 3, existing COMP profiles will be 'converted' to the corresponding new RTA profile (eg. COMP Claim Dispatcher to COMP RTA Claim Dispatcher).

3.4 Allocate to User

The introduction of the new RTA profiles and the automatic conversion of existing profiles do have an effect on the function available to Team Leaders to allocate claims to a specific user.

When using the **Allocate to User** function, the Team Leader is presented with a list of profiles. When selecting a profile, a list of all the users in the organisation with that profile, who can work on the claim, is displayed.

For profiles such as CR Claim Handler and CR Team Leader, there are no restrictions based on branch or the status of the claim. However, for COMP, profiles such as COMP Branch Claim Handler will only include users in the same branch as the claim. Dispatcher profiles will only be included if the claim has not yet been accepted.

The important note is that when allocating claims created prior to Release 3, the list of profiles will be the pre-release 3 profiles. When allocating claims created in Release 3, the list of profiles will be release 3 profiles. Please see the example below:

User: A Handler
 Current profile: CR Claim Handler
 Converted to: CR RTA Claim Handler

When a Team Leader allocates a Release 2 claim, "A Handler" will appear in the list of CR Claim Handler.

When a Team Leader allocates a release 3 claim, "A Handler" will appear in the list of CR RTA Claim Handler.

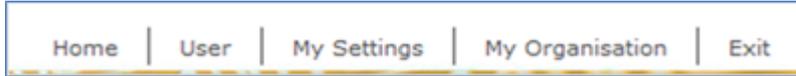


For full details of how the users appear in the Allocate to User function, see Appendix A.

4. Administration console (CR & COMP)

4.1 My organisation

To enable Administrators to view the structure of their own organisation, a new option has been added to the Administration console:



Click on My Organisation, and the following screen will be displayed:

Organisation detail

Organisation ID MIB_CM
 Organisation Name MIB Test Insurer
 Organisation type CM
 Compensator type I
 House name MIB house
 House number 1
 Street 1 MIB street1
 Street 2
 District MIB district
 City MIB city
 County MIB county
 Country United Kingdom
 Postcode PC ODE
 Telephone number
 Fax number
 Email address
 Enabled
 RTA Enabled
 EL/PL Enabled

Branch ID	Branch Name	Address	Branch Type	Enabled
001	Branch 1		Central Point	<input checked="" type="checkbox"/>
002	Branch 2		Handling Point	<input checked="" type="checkbox"/>

The information includes details of the claim types your organisation is registered for, and the branch structure.



For Compensators, it is important to note that the branch defined as the Central Point, is the branch into which new claims will be received.

5. Cosmetic changes (CR & COMP)

5.1 *Printable documents*

All printable documents have been updated to reflect the latest version of the forms, which includes some minor cosmetic changes.

The headings on all documents have been amended to reflect new protocol:

Claim notification form (RTA 1)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

Defendant only Claim notification form (RTA 2)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

Claim notification form (RTA 1)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

Interim Settlement Pack and Response to Interim Settlement Pack (RTA 4)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

Stage 2 Settlement Pack and Response to Settlement Pack (RTA 5)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

Court Proceeding Pack (Part A) (RTA 6)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

Court Proceeding Pack (Part B) (RTA 7)

Low value personal injury claims in road traffic accidents (£1,000 - £25,000)

5.2 Firm or Company

Where previously the word **Company** has been used, it has been replaced with the words **Firm or Company**.

5.3 Statement of truth

The statement of truth has been amended throughout the portal to read as follows:

I am the Claimant's legal representative. The claimant believes that the facts stated in this claim form are true. I have written authority from the Claimant to sign this statement

This affects all printable documents and the various web screens that display the statement of truth.

5.4 Exit reason code

The Exit reason code 'Value of claim above £10,000' has changed to 'Value of claim exceeds the upper limit':

6. Attachments (CR & COMP)

6.1 Size of attachments

The total size of attachments allowed on a claim has been increased to 20MB. The size of an individual attachment remains at 4MB.

Please note that the total applies to all attachments, regardless of whether they have been added by the CR or the COMP.

7. Claim Notification Form (CR)

The Claim Notification Form and associated web forms have been updated to reflect the latest version of the MoJ templates. The changes are detailed below.

7.1 Value of claim

A new question has been added:

The screenshot shows a web form titled 'Application: RTA Process' with the activity 'Activity 0_10 – Claim Data Input/Edit' and status 'Claim Data Input/Edit'. The form has three tabs: '1 - Claim and Claimant Details', '2 - Medical Details', and '3 - Vehicle damage and Alternative vehicle provision'. Under the 'Claim Information' section, the 'Claim ID' is '000000000005680'. A new question 'What is the value of your claim?' is shown with a dropdown menu containing two options: 'Up to £10,000' and 'Up to £25,000'. Below this, the 'Claimant's representative - contact details' section shows 'Firm or Company Name' as 'MIB Claimant Representative'.

The question is mandatory and you must select one of the two options:

- Up to £10,000
- Up to £25,000

7.2 Search Insurer

The Self-Insured option has been removed from the Insurer type:

The screenshot shows a 'Search Insurer' form. At the top, there is a 'Selected Insurer Name' field and a 'Select Insurer' button. Below this, the 'Search Insurer' section has an 'Insurer Type' dropdown menu with options 'Insurer', 'MIB', and 'Insurer'. The 'Name' field is empty, and there is a 'Search' button. At the bottom, there are labels for '# Insurer Name' and 'Contact Name'.

7.3 Referral Source

The Referral Source has been removed from the CNF entry and the printable documents.

7.4 Section D – Vehicle damage

The response to the question *Is the vehicle a Total Loss or likely to be?* has changed from **Unknown** to **Not known**:

Section D - Vehicle damage	
Is the claimant claiming damage to their own vehicle?	YES
Details of the insurance cover held for the vehicle?	Comprehensive
Is the claim for vehicle damage proceeding through the claimant's insurer?	NO
Is the vehicle a Total Loss or likely to be?	Not known
	If No, is the claim for vehicle damage proceeding through an alternative company? NO

7.5 Section L - Funding

The wording relating to funding has been amended to:

Has the claimant undertaken a funding arrangement within the meaning of CPR rule 43.2(1)(k) of which they are required to give notice to the defendant?

Application: RTA Process
 Activity: Activity 0_10 – Claim Data Input/Edit
 Application Status: Claim Data Input/Edit

Quit Activity: [Web](#) [Back](#)
[Attachments/Notes](#)

1 - Claim and Claimant Details 2 - Medical Details 3 - Vehicle damage and Alternative vehicle provision 4 - Accident details 5 - NIS Claims 6 - Other Party Details 7 - Liability/Funding

Section E - Liability

Why does the claimant believe that the defendant was responsible for the incident?

Section L - Funding

Has the claimant undertaken a funding arrangement within the meaning of CPR rule 43.2(1)(k) of which they are required to give notice to the defendant?

The claimant would like their claim to be considered for free legal expenses insurance

The validation of the Agreement date relating to agreement with a membership organisation has been amended so that the date can be prior to the Accident date.

Section L - Funding

Has the claimant undertaken a funding arrangement within the meaning of CPR rule 43.2(1)(k) of which they are required to give notice to the defendant? YES

The claimant has entered into a conditional fee agreement in relation to this claim, which provides for a success fee within the meaning of section 50(2) of the Courts and Legal Services Act 1999 NO

The claimant has taken out an insurance policy to which section 29 of the Access Justice Act 1999 applies. NO

The claimant has an agreement with a membership organisation to meet their legal costs. YES

Organisation Name Agreement Date

Other

The claimant would like their claim to be considered for free legal expenses insurance

7.6 Section M – Other relevant information

Section M, Other relevant information, has been extended from 500 characters to 1,000 characters. Please note that this still includes spaces and punctuation.

Section M - Other relevant information

Comments

7.7 Printable documents

The CNF and Defendant only CNF printable documents have been amended to reflect the new value limits. Some further minor corrections have been made to align the forms to the latest version of the MoJ forms. This includes corrections to the section numbering and other minor cosmetic changes.

Claimant's representative - contact details		Defendant's details	
Name		Defendant's name	
MIB Claimant Representative		A. Defendant	
Address			

Claimant's representative - contact details		Defendant's details	
Name		Defendant's name	
MIB Claimant Representative		A. Defendant	
Address			

8. Insurer response (COMP)

The Insurer response and associated web forms have been updated to reflect the new MoJ templates. The changes are detailed below.

8.1 Section A - Liability

The section has been aligned with the latest version of the MoJ form. This includes some

minor cosmetic amendments, but also the addition of the statement relating to Liability admitted:

The defendant has no accrued defence to the claim under the Limitation Act 1980

8.2 Printable document

The Insurer response printable document has been amended to reflect the new value limits and the changes described above.

9. Stage 1 costs (CR & COMP)

9.1 Overview

The payment of Stage 1 costs have moved from being payable 10 days after the COMP admits liability to 10 days after the CR has submitted the Stage 2 Settlement Pack.

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Note that the change applies to claims created under Release 3 only, i.e. claims that entered into the Claims Portal from the 31st July 2013 onwards.

The changes to the process are described in the sections below.

9.2 Liability admitted

When the COMP submits a **Liability Decision** of **Liability Admitted** for an adult claim, the claim will follow the same process as **Liability Admitted (child claim)**.

This means that when the CR acknowledges the Liability Decision, instead of the buttons **Payment received / Payment not received**, a **Continue** button will be displayed:

The screenshot shows a web form with several sections:

- Section B2 - Services provided by the insurer - Alternative vehicle provision**: A question "Has the insurer instructed the supply of an alternative vehicle?" with the answer "ND".
- Section B3 - Services provided by the insurer - Repairs/Inspection**: A question "Has the insurer organised repairs or arranged an inspection?" with the answer "ND".
- Section C - Services provided by the insurer - Response information**:
 - Date of notification: 25/04/2013
 - Defendant's date of birth: (blank)
 - Defendant's insurer details**:
 - Contact Name: contact
 - Contact Surname: surname
 - Telephone Number: 987654
 - Reference number: 123456
 - Contact Middle Name: (blank)
 - E-mail address: email@test.org.uk
 - Address**:
 - House Name: (blank)
 - Number: (blank)
 - Postcode: (blank)
 - Street 1: (blank)
 - Street 2: (blank)
 - District: (blank)
 - Town/City: (blank)
 - Country: (blank)

At the bottom of the form, there are three buttons: "Continue", "Allocate to user", and "De-allocate".

Note that if you need to take the claim out of the process at this point, you need to press the **Continue** button to reach **Start of Stage 2.1**, where the **Exit process** button is available.

9.3 Notifications

A new notification is sent to both the CR and the COMP when a Stage 2 Settlement pack is sent to the CR to inform you when the Stage 1 costs are payable:

03/04/2013 Claim 000000000005464: the Compensator must pay the Stage 1 costs within 2013-04-17 unless the S2SP is repudiated
--

9.4 Stage 1 costs message to CR

When the time limit for paying Stage 1 costs has been reached, the claim will not automatically time out or return to the CR.

Instead, when the claim returns to the CR with the response from the COMP, if the Stage 1 costs time limit has been reached, a message will be displayed on the CR's screen advising them that the time to pay Stage 1 costs has been reached:

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The time limit for the Compensator to pay Stage 1 Costs has been reached.
If you have not received payment, you may give notice to the Compensator and then use the Exit function to take the claim out of the process.

Dismiss

If you wish to take the claim out of the process, you need to follow the Protocol requirements relating to written notice for taking the claim out of the process, and to use the **Exit process** function.

If the claim should remain in the process and/or the costs were paid on time, you may use the **Dismiss** button to remove the message.

The message will remain on the CR's screens throughout the process until the **Dismiss** button is pressed.

9.5 New Exit reason code

A new Exit reason code is available when the Stage 1 costs time limit has been exceeded:

9.6 Stage 2 Settlement Pack confirmation

When the COMP confirms the CR's Stage 2 Settlement pack without making a counter offer, the claim returns to the CR in the status **Stage 2 Settlement Pack confirmation**.

If the time limit for Stage 1 costs being paid have been reached, and the new Stage 1 costs message displayed, the **Exit process** button is made available as shown below:

Application: RTA Process Activity: F_O_260_SettlementOfDamagesOrReputation Application Status: Stage 2 Settlement Pack confirmation		Quit Activity: Unlock Save Attachments/Notes Printable Documents (5)	
<p>Claimant's and Defendant's representatives Current claimant offer and defendant response Claimant and Defendant responses to replies</p>			
<p>The time limit for the Compensator to pay Stage 1 Costs has been reached. If you have not received payment, you may give notice to the Compensator and then use the Exit function to take the claim out of the process.</p> <p style="text-align: right;"><input type="button" value="Dismiss"/></p>			
Claim Information			
Claim ID	000000000005464	Branch Name	001 - Branch 1
Insurer Company Name	MIB Test Insurer	Was the claimant a child on date of Stage 2 Agreement?	NO
Medical report			
Number of Medical reports for Stage2 Settlement pack	1	Claimant's full name	test test
		Defendant's full name	test
Claimant's representative			
Contact details			
Firm or Company Name	MIB Claimant Representative	Contact Middle Name	
Contact Name	test	Contact Surname	test
Telephone Number	test	E-mail address	test
Reference number	test		
Date of claimant 1st offer	03/04/2013	Date of claimant's reply to insurer	
Defendant's representative			
Contact details			
Firm or Company Name	MIB Test Insurer	Contact Middle Name	
Contact Name	test	Contact Surname	test
Telephone Number	test	E-mail address	test
Reference number	bef		
Date of insurer 1st offer	03/04/2013	Date of reply to claimant	
<input type="button" value="Continue"/> <input type="button" value="Exit process"/>			

10. Loss types (CR & COMP)

10.1 *General damages*

The Loss type *General damages* have been removed and replaced with new Loss types detailed in the next section.

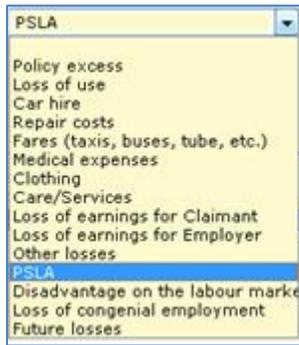
Existing validation rules and defaults relating to *General damages* have been replaced and now refer to *PSLA*.

10.2 *New Loss types*

The following new Loss types have been introduced as part of Release 3:

- PSLA
- Disadvantage on the labour market
- Loss of congenial employment
- Future losses

The full list of the 15 Loss types available is shown below:



10.3 Printable documents

The Interim Settlement Pack, Stage 2 Settlement Pack and Court Proceedings Pack have been updated to reflect the new loss types.

11. Interim Settlement pack (CR & COMP)

11.1 Overview

The Interim Settlement pack process has been amended to allow for multiple interim settlement packs. Functionality relating to Interim Settlement Pack timeouts has been enhanced.

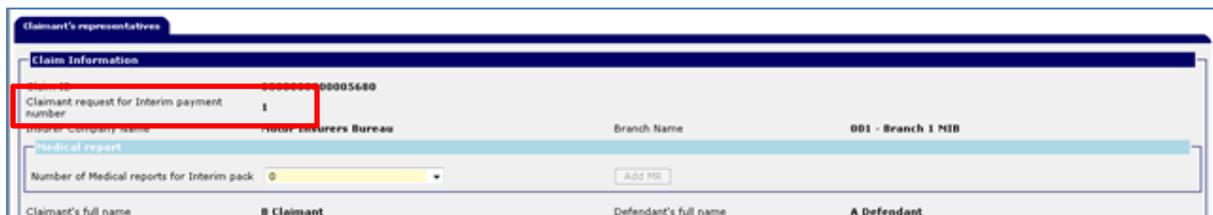
The changes include the following:

- Unique identifier for each payment request
- Return to Start of Stage 2 .1 after payment received
- Validation of initial (first) ISP
- Validation of subsequent ISPs
- Allow for new ISP after ISP timeout

All changes are detailed below.

11.2 Claimant request for Interim payment number

Each Interim Settlement pack is assigned a unique number (Claimant request for Interim payment number). This identifier is shown on the web screens – see example below:



The identifier is printed in the printable document:

Interim Settlement Pack and Response to Interim Settlement Pack (RTA 4)
 Low value personal injury claims in road traffic accidents (£1,000 - £25,000)
 Application ID: 0000000000005675

Claimant request for interim payment number 1

Claimant's full name: test test
 Defendant's full name: test

Claimant's representative **Defendant's representative**

Date of notification: 24 / 04 / 2013 Date of insurer response: / /

11.3 Validation of value of Interim Settlement Packs

The rules relating to Interim Settlement Packs are defined in the protocol. The validation in the Claims Portal has been defined to allow flexibility and include the following rules:

- The first Interim Settlement pack must be for £1,000 or more
- Any subsequent Interim Settlement pack may be of any value greater than £0
- Any loss types can be included in the first and any subsequent Interim Settlement packs

When the first Interim Settlement pack is created, a default of *PSLA* for £1,000 will be displayed:

Application: RTA Process
 Activity: F_070_02_InterimSettlementPack Tab.2
 Application Status: Interim Settlement Pack Form

Is there any seatbelt contributory negligence? NO

Losses (up to 15)

Loss type: PSLA
 Evidence attached: YES
 Gross value claimed (£): 1,000.00

Is the Interim item being pursued? YES
 Comments:
 % Contributory Negligence deductions: 0

Submit loss

Back Continue Allocate to user De-allocate Exit process

If *PSLA* is required, you may change the value claimed and press the **Submit loss** button.

However, if *PSLA* is not required, you can change the Loss type using the drop-down menu. Note that the screen will be refreshed at this point to open up the fields:

11.4 Multiple Interim Settlement Packs

When the CR has received the Interim payment, the claim will return to the Start of Stage 2.1:

If a further Interim payment is required and allowed according to the protocol, you can use the button **Interim payment needed**. If no further Interim payment is required/allowed, you need to press the **Interim payment not needed** button to proceed to Stage 2 Settlement pack.

When creating a new Interim Settlement Pack, the Claimant request for Interim payment number will be incremented as shown in the example below:

When the entry is complete and the Interim Settlement Pack printable document is generated, it will contain the new interim payment request and the previous agreed requests.

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The printable document will list the requests in descending order, so that the latest request comes first.

11.5 Rejected Interim Settlement Packs

If an Interim Settlement pack is rejected by the COMP, it will be removed from the printable document.

If the CR requests a new Interim payment, the Claimant request for Interim payment number will be reset to the same number as the rejected ISP.

Please note that if the first ISP is rejected and a new request is made, the validation rules applicable to the first ISP will apply. If a subsequent ISP is rejected and a new request is made, the validation rules applicable to subsequent ISPs will apply.

11.6 Interim Settlement Pack time limits

The existing time limits relating to the Interim Settlement pack remain for the first ISP:

- ISP of £1,000: 10 days, no extension allowed
- ISP greater than £1,000: 15 days, the COMP may extend the timeout for CRU (extension to 30 days)

For subsequent ISPs, regardless of the value of the request, the timeout is set to 15 days with the COMP being allowed to extend it for CRU (extension to 30 days).

11.7 Interim Settlement Pack timeout – enhanced functionality

The Interim Settlement Pack timeout functionality has been enhanced, so that if a timeout occurs, the CR will be presented with three options:

Application: RTA Process
Activity: Interim Payment Decision Timeout
Application Status: Interim Payment Decision Timeout

Quit Activity: [Unblock](#)
[Sign](#)
[Attachments/Notes](#)
[Printable Documents \(4\)](#)

Reject Interim Request

The time limit available for the Compensator to take an Interim payment decision for this claim has been reached.
If you still want to proceed to the Stage 2 Settlement pack, please click the button Continue below.
If you want to return to the Start of Stage 2.1 to ask for another Interim payment, please click the button Return to Start below.
Otherwise if you want to take the claims out of the process because the Interim payment request was not answered and/or paid on time, please click the button Exit below. In the Exit page, select the Reason code "Interim Payment request not answered and/or paid on time" from the drop down list.

Claim Information			
Claim ID	000000000005444	Sent Date	28/03/2013
Insurer Company Name	Motor Insurers Bureau	Branch Name	001 - Branch 1 MIB
Claimant			
Full name	test test		
Defendant			
Full name	test test	Policy number reference	test

Return to Start Continue Exit process

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The options are:

- Proceed to Stage 2 Settlement pack by pressing the **Continue** button
- Return to Start of Stage 2.1 to create a new Interim payment request by pressing the **Return to Start** button
- Use the **Exit process** button to take the claim out of the process.

Note that if you chose to return to Start of Stage 2.1 to create a new ISP, the timed out request will be removed from the Printable document, and the Claimant request for Interim payment number will be reset to the same number as the timed out ISP.

11.8 Interim Settlement Pack – partial payment not accepted

Please note that when a Partial Interim Payment is not accepted by the CR, the existing process of the claim leaving the portal remains.

This applies for both the first (single) ISP and any subsequent ISPs.

11.9 Multiple interim payments – impact on Stage 2 Settlement pack

If a single interim payment has been agreed, the contents of the Interim Settlement pack will be carried forward to the Stage 2 Settlement pack in line with existing Release 2 functionality, where they can be edited or removed.

However, if more than one Interim Settlement pack has been agreed, the individual loss types from the ISPs will not be carried forward to the Stage 2 Settlement pack.

In both cases, the total value of the Interim payment(s) will be carried forward and included on the printed Stage 2 Settlement pack. The value will also be available to the COMP, who can amend it to reflect any payments made outside of the Claims Portal.

12. Stage 2 Settlement pack (CR & COMP)

12.1 Interest fields

For all Loss types, a new field has been added to the Stage 2 Settlement Pack Form, *Claimant offer interest*.

Application: RTA Process
Activity: F_0_210_2_SettlementPackInitialOffer
Application Status: Stage 2 Settlement Pack Form

Current claimant offer

Losses (up to 15)

Loss type		Comments	
Evidence attached		% Contributory Negligence deductions	
Gross value claimed (£)			
Claimant offer Interest	0.00		

Submit loss

Back Allocate to user De-allocate Exit process Continue

The field is mandatory but £0 is allowed.

A corresponding field, *Defendant response interest*, has been added to the COMP's response:

Application: RTA Process
Activity: Stage2 Settlement pack response Tab2
Application Status: Stage 2 Settlement Pack decision

Current claimant offer and defendant response

Settlement pack decision

Loss type PSLA

Current claimant offer			
Evidence attached	YES	Comments	
Gross value claimed (£)	3,500.00	% Contributory Negligence deductions	0.00
Claimant offer Interest	5.00	Value claimed after contribution (£)	3,505.00

Current defendant response			
Is gross amount agreed?		Comments	
Gross value offered (£)		% Contributory Negligence deductions	
Defendant response Interest	0.00		

If the COMP's response is **Confirm**, the Defendant response Interest will be populated with the Claimant offer Interest.

If the COMP's response is **Counter Offer**, the Defendant response Interest can be edited.

Please note that the new Interest fields are only available throughout the Stage 2 and that they are not carried forward to the Court Proceedings pack.

12.2 Calculations

The new Interest fields are taken into account when the totals are calculated:

Net value claimed EQUALS
Gross value claimed MINUS
(Gross value claimed * % contributory negligence deductions) PLUS
Claimant offer Interest

Net value offered EQUALS
Gross value offered MINUS
(Gross value offered * % contributory negligence deductions) PLUS

Defendant offer Interest

13. Court Proceedings Pack (CR & COMP)

13.1 Editable fields - CR

From Release 3, the values for each Loss Type have been opened up to allow the CR to edit the values claimed.

The CR is also able to enter the Defendant's final offer and legal representative.

Application: RTA Process Activity: Court Proceedings Pack request Application Status: Court Proceedings Pack Form		Quit Activity: Unlock Save Submit Query Attachments/Notes Printable Documents (4)	
Claimant Losses and Defendant response		Claimant's representatives and Defendant's representative	
Claimant Losses and Defendant response			
Claimant Losses			
Loss type	PSLA		
Evidence attached	YES	% Interest rate	
Gross value claimed (£)	4,000.00	% Contributory Negligence deductions	0.00
Net value claimed (£)	4,000.00	Comments	
Defendant response			
Gross value offered (£)	2,500.00	% Contributory Negligence deductions	0.00
Net value offered (£)	2,500.00	Comments	
Are all disbursements agreed and paid? <input type="text"/>			
Court proceedings Pack Form (Part B)			
Claimant final offer (£) <input type="text"/>		Defendant final offer (£) <input type="text"/>	
Fixed costs			
Stage 1 fixed costs paid	<input type="text"/>	Stage 2 fixed costs paid	<input type="text"/>
Has the defendant named a legal representative to accept service of legal proceedings on the defendant's behalf? <input type="text"/>			
Statement of truth			
Signatory Type	<input checked="" type="radio"/> I am the Claimant's legal representative. The claimant believes that the facts stated in this claim form are true. I have written authority from the Claimant to sign this statement <input type="radio"/> I am the Claimant. I believe that the facts stated in this claim form are true		
I have retained a signed copy of this form including the statement of truth <input type="text"/>			
<input type="button" value="Back"/> <input type="button" value="Allocate to user"/> <input type="button" value="De-allocate"/> <input type="button" value="Exit process"/> <input type="button" value="Send"/>			

13.2 Editable fields - COMP

In the same way as for the CR, the defendant's offer is open up and can be edited when the COMP responds to the Court Proceedings Pack. The COMP can also amend the Defendant's final offer and legal representative.

Application: RTA Process
 Activity: Court Proceedings Pack response
 Application Status: Court Proceedings Pack Form Response

Quit Activity: [Unlock](#) [Save](#)
[Attachments/Notes](#)
[Printable Documents \(5\)](#)

Claimant Losses and Defendant response **Claimant's representatives and Defendant's representative**

Claimant Losses and Defendant response

Claimant Losses

Loss type	PSLA		
Evidence attached	YES	% Interest rate	0.00
Gross value claimed (£)	4,000.00	% Contributory Negligence deductions	0.00
Net value claimed (£)	4,000.00	Comments	

Defendant response

Gross value offered (£)	2,500.00	% Contributory Negligence deductions	0.00
Net value offered (£)	2,500.00	Comments	

CRU benefits received (£)
 Up to date CRU Certificate attached Comments

Are all disbursements agreed and paid? **YES**

Court proceedings Pack Form (Part B)

Claimant final offer (£)	4,000.00	Defendant final offer (£)	2,500.00
--------------------------	----------	---------------------------	----------

Fixed costs

Stage 1 fixed costs paid	YES	Stage 2 fixed costs paid	YES
--------------------------	-----	--------------------------	-----

Has the defendant named a legal representative to accept service of legal proceedings on the defendant's behalf?

Statement of truth

Signatory Type **I am the Claimant's legal representative. The claimant believes that the facts stated in this claim form are true. I have written authority from the Claimant to sign this statement**

I have retained a signed copy of this form including the statement of truth **YES**

Required Fields Optional Fields

13.3 Printable document

A footnote has been added to page 4 of the Court Proceedings pack Part B, form RTA 7:

Court Proceeding Pack (Part B) (RTA 7) Low value personal injury claims in road traffic accidents (£1,000 - £25,000)		This form should be submitted to the court in a sealed envelope			
Application ID: 0000000000005418					
Date of accident		01 / 01 / 2013			
Claimant's full name test test		Defendant's full name test			
Claimant's representative		Defendant's representative			
Contact details		Contact details			
Firm or Company name MIB Claimant Representative		Firm or Company name MIB Test Insurer			
Contact name test test		Contact name test test			
Telephone number test		Telephone number test			
E-mail address test		E-mail address test			
Reference number test		Reference number bef			
Claimant final offer 5000.00		Judge's award		Defendant final offer 2500.00	
Fixed costs: Stage 1 fixed costs paid <input checked="" type="checkbox"/>		Stage 2 fixed costs paid <input checked="" type="checkbox"/>		<i>Practitioner note: The offer inserted in Part B may differ from the total of the separate heads of claims listed in Part A.</i>	

Appendix A – Allocate to user

User	Release 2 profile	Converted / New user	Release 3 profile	Allocate user	Allocate user	Allocate user
				Claim created prior to release 3	RTA Claim created in release 3	EL/PL Claim created in release 3
				User appears in list as:	User appears in list as:	User appears in list as:
A Handler	CR Claim Handler	Converted	CR RTA Claim Handler	CR Claim Handler	CR RTA Claim Handler	None
B Handler	CR Team Leader	Converted	CR RTA Team Leader	CR Team Leader	CR RTA Team Leader	None
C Handler		New user	CR Claim Handler	CR Claim Handler	CR Claim Handler	CR Claim Handler
D Handler		New user	CR Team Leader	CR Team Leader	CR Team Leader	CR Team Leader
E Handler		New user	CR RTA Claim Handler	CR Claim Handler	CR RTA Claim Handler	None
F Handler		New user	CR RTA Team Leader	CR Team Leader	CR RTA Team Leader	None
G Handler		New user	CR EL/PL Claim Handler	None	None	CR EL/PL Claim Handler
H Handler		New user	CR EL/PL Team Leader	None	None	CR EL/PL Team Leader

User	Release 2 profile	Converted / New user	Release 3 profile	Allocate user	Allocate user	Allocate user
				Claim created prior to release 3	RTA Claim created in release 3	EL/PL Claim created in release 3
				User appears in list as:	User appears in list as:	User appears in list as:
A Handler	COMP Claim Handler	Converted	COMP RTA Claim Handler	COMP Claim Handler	COMP RTA Claim Handler	None

User	Release 2 profile	Converted / New user	Release 3 profile	Allocate user	Allocate user	Allocate user
B Handler	COMP Claim Handler Team Leader	Converted	COMP RTA Claim Handler Team Leader	COMP Claim Handler Team Leader	COMP RTA Claim Handler Team Leader	None
C Handler	COMP Branch Claim Handler	Converted	COMP RTA Branch Claim Handler	COMP Branch Claim Handler *	COMP RTA Branch Claim Handler *	None
D Handler	COMP Claim Dispatcher	Converted	COMP RTA Claim Dispatcher	COMP Claim Dispatcher **	COMP RTA Claim Dispatcher **	None
E Handler	COMP Branch Claim Dispatcher	Converted	COMP RTA Branch Claim Dispatcher	COMP Branch Claim Dispatcher ***	COMP RTA Branch Claim Dispatcher ***	None
F Handler		New user	COMP Claim Handler	COMP Claim Handler	COMP Claim Handler	COMP Claim Handler
G Handler		New user	COMP Claim Handler Team Leader	COMP Claim Handler Team Leader	COMP Claim Handler Team Leader	COMP Claim Handler Team Leader
H Handler		New user	COMP Branch Claim Handler	COMP Branch Claim Handler *	COMP Branch Claim Handler *	COMP Branch Claim Handler *
I Handler		New user	COMP Claim Dispatcher	COMP Claim Dispatcher **	COMP Claim Dispatcher **	COMP Claim Dispatcher **
J Handler		New user	COMP Branch Claim Dispatcher	COMP Branch Claim Dispatcher ***	COMP Branch Claim Dispatcher ***	COMP Branch Claim Dispatcher ***

User	Release 2 profile	Converted / New user	Release 3 profile	Allocate user	Allocate user	Allocate user
K Handler		New user	COMP RTA Claim Handler	COMP Claim Handler	COMP RTA Claim Handler	None
L Handler		New user	COMP RTA Claim Handler Team Leader	COMP Claim Handler Team Leader	COMP RTA Claim Handler Team Leader	None
M Handler		New user	COMP RTA Branch Claim Handler	COMP Branch Claim Handler *	COMP RTA Branch Claim Handler *	None
N Handler		New user	COMP RTA Claim Dispatcher	COMP Claim Dispatcher **	COMP RTA Claim Dispatcher **	None
O Handler		New user	COMP RTA Branch Claim Dispatcher	COMP Branch Claim Dispatcher ***	COMP RTA Branch Claim Dispatcher ***	None
P Handler		New user	COMP EL/PL Claim Handler	None	None	COMP EL/PL Claim Handler
Q Handler		New user	COMP EL/PL Claim Handler Team Leader	None	None	COMP EL/PL Claim Handler Team Leader
R Handler		New user	COMP EL/PL Branch Claim Handler	None	None	COMP EL/PL Branch Claim Handler *
S Handler		New user	COMP EL/PL Claim Dispatcher	None	None	COMP EL/PL Claim Dispatcher **
T Handler		New user	COMP EL/PL Branch Claim Dispatcher	None	None	COMP EL/PL Branch Claim Dispatcher ***

Notes

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- * If the claim belongs to same branch as the user
- ** If the claim is not yet accepted
- *** If the claim is not yet accepted and it belongs to the same branch as the user