

## Lesson 7      **Specialized Claim Processes - Workers' Compensation**

ClaimCenter includes several specialized processes that can help in managing Workers' Comp claims. A Matter is a ClaimCenter concept that records detailed information about a legal matter. Subrogation is another concept that keeps information pertinent to passing on claim costs to a third-party that is in some way responsible for the claim.

### 7.1      **Exercise: Adding a matter to a claim**



#### **Activity**

In this exercise, you begin the management of a legal matter.

Paul PattisonXX has decided to sue HGI RoofingXX. Paul claims that he used the safety equipment (carabiner and line) provided and it failed because it had not been properly maintained.

1. **Log on to ClaimCenter as Will StudentXX (user: wstudentXX, password: gw) and open the Paul PattisonXX claim.**
2. **Paul's attorney is Dewey C. HoweXX. Add Mr. Howe to the Parties Involved as a new Attorney with role of Primary Plaintiff's Attorney. Mr. HoweXX's office address is 1231 Hemmings Plaza, Atlanta GA. His tax ID is 12-98382XX.**
3. **Succeed Insurance's choice for a defense attorney is Lily Watson. Add her as an existing contact with the role of Primary Defense Attorney.**
4. **On the Classification pane of Loss Details → General, set Employer Liability? to Yes.**
5. **Navigate to Summary → Overview and verify that there is a new Employer Liability exposure.**
6. **Navigate to Litigation and create a New Matter with the following details:**
  - a) The Matter Type is Lawsuit.
  - b) The Name is PattisonXX Suit.
  - c) Fill in details for: Plaintiff, Defendant (HGI RoofingXX), Plaintiff Attorney, and Defense Attorney.
  - d) Click Update.
7. **Mr. Howe has requested that HGI RoofingXX and Succeed Insurance not contact his client.**
  - a) Navigate to Parties Involved and select Paul PattisonXX.
  - b) In the Phone pane, change Contact Prohibited? to Yes.
8. **Ms. Watson has requested a detailed statement from Sam DevoreXX. Create a new Activity, of type Get a statement from witness, related to the PattisonXX matter. The description should be "Get a detailed statement from Sam DevoreXX for Attorney Watson."**
9. **Ms. Watson has reviewed HGI Roofing's equipment maintenance logs. Based on the information therein, she believes that this may be a fraudulent suit. Add a note to the PattisonXX matter with the Topic of Litigation. The note should read, "Attorney Watson suggests that the matter may be fraudulent."**

10. Return to **Litigation → Matters** and click the **PattisonXX Suit**. The activity should be in the **Planned Activities** for the matter.



**Stop**

## 7.2 Solution: Adding a matter to a claim



**Solution**

1. Log on to ClaimCenter as Will StudentXX (user: wstudentXX, password: gw) and open the Paul PattisonXX claim.
2. Paul's attorney is Dewey C. HoweXX. Add Mr. Howe to the Parties Involved as a new Attorney with role of Primary Plaintiff's Attorney. Mr. HoweXX's office address is 1231 Hemmings Plaza, Atlanta GA. His tax ID is 12-98382XX.
3. Succeed Insurance's choice for a defense attorney is Lily Watson. Add her as an existing contact with the role of Primary Defense Attorney.
4. On the Classification pane of Loss Details → General, set Employer Liability? to Yes.
5. Navigate to Summary → Overview and verify that there is a new Employer Liability exposure.
6. Navigate to Litigation and create a New Matter with the following details:
  - a) The Matter Type is Lawsuit.
  - b) The Name is PattisonXX Suit.
  - c) Fill in details for: Plaintiff, Defendant (HGI RoofingXX), Plaintiff Attorney, and Defense Attorney.
  - d) Click Update.

**New Matter**

**General Details**

Matter Type: \* Lawsuit

Name: \* Pattison99 Suit

Case Number:

Plaintiff: Paul Pattison99

Defendant: HGI Roofing99

Related to Subrogation? ☐ Yes ☐ No

**Litigation Details**

Court Type: State

Court District: <none>

Legal Speciality: <none>

Primary Cause: <none>

**Primary Counsel**

Plaintiff Attorney: Dewey Howe99

Plaintiff Law Firm: <none>

Defense Attorney: Lily Watson

Defense Law Firm: <none>

Owner: \* Use automated assignment

7. **Mr. Howe has requested that HGI RoofingXX and Succeed Insurance not contact his client.**
  - a) Navigate to Parties Involved and select Paul PattisonXX.
  - b) In the Phone pane, change Contact Prohibited? to Yes.
8. **Ms. Watson has requested a detailed statement from Sam DevoreXX. Create a new Activity, of type Get a statement from witness, related to the PattisonXX Suit. The description should be “Get a detailed statement from Sam DevoreXX for Attorney Watson.”**

New Activity in Claim 000-00-000106

Subject	* Get a statement from witness
Description	Get a detailed statement from Sam Devore99 for Attorney Watson
Related To	* Pattison99 Suit
Due Date	02/06/2019
Escalation Date	MM/dd/yyyy
Priority	* Normal
Mandatory	No
Calendar Importance	* Not On Calendar
Recurring	No
Externally Owned	* <input type="radio"/> Yes <input checked="" type="radio"/> No
External Owner	<none>
Document Template	
Email Template	
Assign To	* Use automated assignment

9. **Ms. Watson has reviewed HGI Roofing’s equipment maintenance logs. Based on the information therein, she believes that this may be a fraudulent suit. Add a note to the PattisonXX matter with the Topic of Litigation. The note should read, “Attorney Watson suggests that the matter may be fraudulent.”**

Note

Topic	* General
Security Type	<none>
Subject	
Related To	* Pattison99 Suit
Confidential	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Text	* Attorney Watson suggests that the matter may be fraudulent.

10. **Return to Litigation → Matters and click the PattisonXX Suit. The activity should be in the Planned Activities for the matter. The note should be in the Latest Notes for the matter.**

Primary Counsel		Resolution	
Plaintiff Attorney	Dewey Howe99	Final Legal Cost	
Plaintiff Law Firm		Final Settlement Cost	
Defense Attorney	Lily Watson	Final Settlement Date	
Defense Law Firm			
Defense Appointed Date			
Sent To Defense Date			
Status Lines			
Matter Status	Start Date	Completion Date	
Matter filed	05/24/2019	05/24/2019	
Secondary Attorney			
Contact	Active?	Comments	
No data to display			
Planned Activities			
Due	Priority	Subject	Assigned To
02/06/2019	Normal	Get a statement from witness	Will Student99
Latest Notes			
Attorney Watson suggests that the matter may be fraudulent. -Will Student99 (05/24/2019 1:35 PM)			

## 7.3 Exercise: Subrogation



### Activity

In this exercise, you create a claim with the potential for subrogation.

You complete the activity as wstudentXX.

#### 1. You receive a call from HGI RoofingXX about another accident. The transcript follows.

Hello, this is Sam Devore of HGI RoofingXX. If we get disconnected, my callback is 404-444-68XX.

We have been looking further into the details of the Pattison accident. We discovered that Mr. Pattison did connect his carabiner to the safety line correctly. However, it looks like it failed when he fell. If it had worked properly, it would have prevented his fall to the ground. We are having the carabiner evaluated by an expert and will let you know what we find. The safety equipment supplier is Safety Products LLC.

Failure of the carabiner is possible cause for subrogation. This is grounds for subrogating at least part of the claim prior to manufacturer or supplier of the carabiner, as the defect contributed to the accident.

Most of the work will be done by a Subrogation specialist. However, you will enter some of the Subrogation data.

- In the claim, navigate to Summary → Status and set Subrogation Status to In Review. In order to save, you must set the Coverage in Question field; set it to No.
- Navigate to Subrogation
- Set Fault to Other party at fault and click Update.
- Add a note on the Subrogation screen with the following details:
  - For the subject, enter "Carabiner failure"

- b) For the note text, enter "HGI suspects that the safety carabiner failed which resulted in the fall to the ground. The manufacturer or supplier may share responsibility."
- c) Click Update.
- 6. **Succeed Insurance's Subrogation specialist determines that Safety Products LLC is 80% responsible for the accident. Edit the subrogation and create the new company and set the liability and expected recovery to 80%.**
- 7. **Change the Subrogation Status to Open.**
- 8. **Refer the claim to Subrogation. In Referral Comment, enter "It looks like the safety carabiner failed." and click Update.**
- 9. **Look at the Subrogation History items to see that the subrogation has been referred to Ernie Dean.**
- 10. **Log out of ClaimCenter.**



## 7.4 Solution: Subrogation



1. **You receive a call from HGI RoofingXX about another accident. The transcript follows.**

Hello, this is Sam Devore of HGI RoofingXX. If we get disconnected, my callback is 404-444-68XX.

We have been looking further into the details of the Pattison accident. We discovered that Mr. Pattison did connect his carabiner to the safety line correctly. However, it looks like it failed when he fell. If it had worked properly, it would have prevented his fall to the ground. We are having the carabiner evaluated by an expert and will let you know what we find. The safety equipment supplier is Safety Products LLC.

Failure of the carabiner is possible cause for subrogation. This is grounds for subrogating at least part of the claim back to manufacturer or supplier of the carabiner, as the defect contributed to the accident.

Most of the work will be done by a Subrogation specialist. However, you will enter some of the Subrogation data.

2. **In the claim, navigate to Summary → Status and set Subrogation Status to In Review. In order to save, you must set the Coverage in Question field; set it to No.**

Coverage in Question	
Coverage in Question?	* <input type="radio"/> Yes <input checked="" type="radio"/> No
SIU	
SIU Status	No SIU referral
SIU Score	0
Referred to SIU team?	No
Flag Details	
Flagged?	Currently flagged
Date Flagged	05/23/2019
Reason for Flag	Overdue high priority activity; Determine compensability; Overdue high priority activity; Get wage statement and tax status
Subrogation	
Subrogation Status	In Review

### 3. Navigate to Subrogation

### 4. Set Fault to Other party at fault and click Update.

Subrogation: Summary	
<a href="#">General</a> <a href="#">Notes</a> <a href="#">Documents</a>	
<a href="#">Update</a> <a href="#">Cancel</a>	
General	
Jurisdiction	Georgia
Fault	Other party at fault
Subrogation Status	* In Review
Externally Owned	* <input type="radio"/> Yes <input checked="" type="radio"/> No
<a href="#">Responsible Parties</a> <a href="#">Add</a> <a href="#">Remove</a>	
Party	Classification Strategy Liability % Expected Recovery %
Claim Total:	0.0% 0.0%
<input type="checkbox"/> Subrogate Individual Exposures	
<a href="#">Statute of Limitations</a> <a href="#">Add</a> <a href="#">Remove</a>	
Type	Jurisdiction Description Statute Deadline
No data to display	

### 5. Add a note on the Subrogation screen with the following details:

- d) For the subject, enter "Carabiner failure"
- e) For the note text, enter "HGI suspects that the safety carabiner failed which resulted in the fall to the ground. The manufacturer or supplier may share responsibility."
- f) Click Update.

Add Note <a href="#">Return to Subrogation: Summary</a>	
Topic	Subrogation
Security Type	<none>
Subject	Carabiner failure
Related To	* Claim
Confidential	* <input type="radio"/> Yes <input checked="" type="radio"/> No
Text	* HGI suspects that the safety carabiner failed which resulted in the fall to the ground. The manufacturer or supplier may share responsibility.

6. Succeed Insurance's Subrogation specialist determines that Safety Products LLC is 80% responsible for the accident. Edit the subrogation and create the new company and set the liability and expected recovery to 80%.

New Party [Return to Subrogation: Summary](#)

[OK](#) [Cancel](#)

Responsible Party

Name \* Safety Products LLC

Primary Phone

Address

Liability % \* 80 %

Expected Recovery % \* 80 %

Plan of Actions

Classification <none>

Strategy <none>

Government Involved No

Primary Contact

Name <none>

Relationship to Responsible Party <none>

Primary Phone

Address

7. Change the Subrogation Status to Open.

Subrogation: Summary

[General](#) [Notes](#) [Documents](#)

[Update](#) [Cancel](#)

General

Jurisdiction Georgia

Fault Other party at fault

Subrogation Status \* Open

Externally Owned \* ☐ Yes ☒ No

Deductible

Prorate Deductible \* ☐ Yes ☒ No

Deductible To Repay -

Deductible Repaid -

Responsible Parties [Add](#) [Remove](#)

<input type="checkbox"/> Party	Classification	Strategy	Liability % *	Expected Recovery % *
<input type="checkbox"/> Safety Products LLC	<none>	<none>	80 %	80 %
Claim Total:			80.0%	80.0%

☐ Subrogate Individual Exposures

Statute of Limitations [Add](#) [Remove](#)

Type	Jurisdiction	Description	Statute Deadline
No data to display			

8. Refer the claim to Subrogation. In Referral Comment, enter "It looks like the safety carabiner failed." and click Update.
9. Look at the Subrogation History items to see that the subrogation has been referred to Ernie Dean.

History

All (1 - 20 of 25) << < 1 / 2

Type	Related To	User	Event Time Stamp	Description
Referred	Subrogation	Will Student99	05/24/2019 2:23 PM	Subrogation for Claim 000-00-000106 has been referred and assigned to Ernie Dean
Opened	Subrogation	Will Student99	05/24/2019 2:09 PM	Subrogation has been identified on the claim and set to In Review
Litigated	Entire claim	Will Student99	05/24/2019 1:31 PM	Claim is now being litigated
Opened	Pattison99 Suit	Will Student99	05/24/2019 1:31 PM	New matter created
Assigned	Pattison99 Suit	Will Student99	05/24/2019 1:31 PM	Assigned to user Will Student99 in group WC Training Group 99

10. Log out of ClaimCenter.