

# 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? | <input type="radio"/> Yes <input type="radio"/> No               |
| Litigation Details      |  |
| Court Type              | State  |
| Court District          | <none>   |
| Legal Specialty         | <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 <input type="button" value="Search"/> |

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

- 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

|               |  |                     |
|---------------|--|---------------------|
| Note          | <input type="text"/>   |                     |
| <b>Update</b> | <b>Cancel</b>  | <b>Use Template</b> |
| Topic         | * <input type="text" value="General"/>   |                     |
| Security Type | <input type="text" value="&lt;none&gt;"/>  |                     |
| Subject       | <input type="text"/>   |                     |
| Related To    | * <input type="text" value="Pattison99 Suit"/>   |                     |
| Confidential  | * <input type="radio"/> Yes <input checked="" type="radio"/> No  |                     |
| Text          | * <input type="text" value="Attorney Watson suggests that the matter may be fraudulent."/> <input type="button" value="Search"/> |                     |

- 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.**

|   |                       |
|---|-----------------------|
| <b>Primary Counsel</b>  | <b>Resolution</b>     |
| 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  |                       |
| <b>Status Lines</b>   |                       |
| Matter Status Start Date Completion Date  |                       |
| Matter filed 05/24/2019 05/24/2019  |                       |
| <b>Secondary Attorney</b>   |                       |
| Contact Active? Comments  |                       |
| No data to display  |                       |
| <b>Planned Activities</b>   |                       |
| Due Priority Subject Assigned To  |                       |
| 02/06/2019 Normal Get a statement from witness Will Student99                                       |                       |
| <b>Latest Notes</b>   |                       |
| Attorney Watson suggests that the matter may be fraudulent.<br>-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 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.
3. Navigate to Subrogation
4. Set Fault to Other party at fault and click Update.
5. Add a note on the Subrogation screen with the following details:
  - a) 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? \*  Yes  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

**General**

Jurisdiction: Georgia

Fault: Other party at fault

Subrogation Status: \* In Review

Externally Owned: \*  Yes  No

**Responsible Parties**

| Party        | Classification | Strategy | Liability % | Expected Recovery % |
|--------------|----------------|----------|-------------|---------------------|
| Claim Total: |                |          | 0.0%        | 0.0%                |

Subrogate Individual Exposures

**Statute of Limitations**

| 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 [Return to Subrogation: Summary](#)

Topic: Subrogation

Security Type: <none>

Subject: Carabiner failure

Related To: \* Claim

Confidential: \*  Yes  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

Deductible

Prorate Deductible: No

Deductible To Repay: -

Deductible Repaid: -

Responsible Parties

| Party               | Classification | Strategy | Liability % | Expected Recovery % |
|---------------------|----------------|----------|-------------|---------------------|
| Safety Products LLC | <none>         | <none>   | 80 %        | 80 %                |

Claim Total: 80.0% 80.0% \$4,160.00

Subrogate Individual Exposures

Statute of Limitations

| 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

Type: All

Related To: Subrogation

User: Will Student99

Event Time Stamp: 05/24/2019 2:23 PM

Description: Subrogation for Claim 000-00-000106 has been referred and assigned to Ernie Dean

Opened: Subrogation

User: Will Student99

Event Time Stamp: 05/24/2019 2:09 PM

Description: Subrogation has been identified on the claim and set to In Review

Litigated: Entire claim

User: Will Student99

Event Time Stamp: 05/24/2019 1:31 PM

Description: Claim is now being litigated

Opened: Pattison99 Suit

User: Will Student99

Event Time Stamp: 05/24/2019 1:31 PM

Description: New matter created

Assigned: Pattison99 Suit

User: Will Student99

Event Time Stamp: 05/24/2019 1:31 PM

Description: Assigned to user Will Student99 in group WC Training Group 99

**10. Log out of ClaimCenter.**