AIM 2.0 User Guide

Contents

Johns Eastern's TPA claims system AIM 2.0 allows users to adjust, investigate and manage claims. The system contains Workers Compensation, General Liability, Property and Vehicle/Auto claims. This document outlines the general use of the system. AIM 2.0 is highly customized based on security role. For this reason not all screens outlined in this document will be available for every user.

General Navigation(please follow links for more detail on each section):

1. User Settings- Click this link to access your user settings. This area allows you to customize the AIM 2.0 applications.
2. Home Menu- This menu contains links to claims search, diary audit, dialogs and workbench.
3. File Menu- This menu contains links to tools to enter claims, move claims and delete claims.
4. Payables Menu- This menu conatins links to various check funtionality.
5. Billing Menu- This menu contains links to post time, print invoices and post receipts.
6. Support Menu- This menu contains links to all support areas of the program.
7. Tools Menu- This menu contains links to all administrative tools.
8. Reports Menu- This menu contains links to all web reports.
9. Diary Audit Calendar- Click on the calendar to open the diary audit calendar.
10. Legal Calendar- Click on the icon to open the litigation calendar.
11. Help Menu- Click on this link to view the Online Help Documentation.
12. Logout- Click on this to end your session.
13. Quick Search- Use this to search by claim number.
14. Task Calendar- Use this calendar to control the day of your task view.
15. Task User- If you are a supervisor click the icon to view other's tasks.
16. Today's Tasks- This area shows your current tasks.
17. Workflow Login- Click here to access your document workflow.
18. Workflow Tasks- This area shows notification of any overdue workflow tasks.
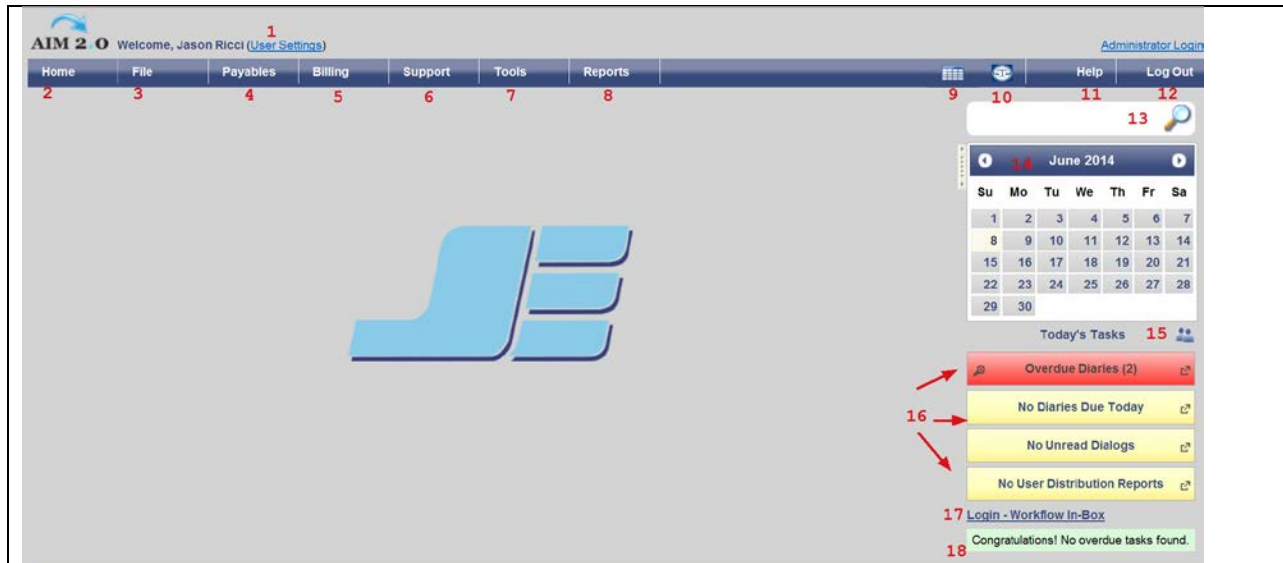
AIM 2.0 User Settings

The User Settings section of the AIM 2.0 application allows users to edit personal information such as email signatures, search settings, notification settings, address book and quick phrases. If you have any questions regarding any of these settings, please email the Johns Eastern Help Desk Here. Help Desk

Login to AIM 2.0	
Click on the User Settings link	
On the **General Tab** users are able to complete the following tasks: 1. Change your password. 2. Set the confirmation timing. (This controls when notification windows close automatically. A setting of never requires the user to click the ok button on the popup.) 3. Edit your personal information. 4. Add an email signature. 5. Save your work.	

| General | Search Settings | Notifications | Address Book | Phrases | **1** | Change Password |

Confirmation Auto Close: Never ⌄ **2**

First Name: Only   Last Name: View

3 Title:

Phone #:

Fax #:

Email Address:

4 Email Signature:

| Paragraph ⌄ | Font ⌄ | Size ⌄ | Color ⌄ | Highlight ⌄ |

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5 Save   Cancel

On the **Search Settings Tab** users are able to customize Claim Search Results and the Party Search Results. The following explains each option:

1. This area allows the user to select the columns that will be displayed in the results of any claim search.
2. This area allows the user to select the columns that will be displayed in the results of any party search.
3. This button will reset the colums to the default for the given search.
4. Highlight an Available Column and hit the + to add it to the selected columns.
5. Highlight a Selected Column and hit the – to remove the selected column.
6. Use the up and down area to order the selected columns.
7. Use the dropdown to set the default sort for the selected search.
8. Save your work.

On the **Notifications tab** users are able to choose which notifications show in the "Today's Tasks" area and also control the color, details and display options of the notifications. The following explains each option:

1. This area shows which notifications will show in the Today's Tasks Area.
2. This area shows available notifications that are not shown. Notifications can be moved between the two sections by clicking and dragging the notification.
3. Click the + to expand the notifications in the selected notifications section to view the details.
4. If this box is checked the notification will not show if there are no items present for that notification. As soon as a notification is present it will be displayed.
5. If this box is checked additional details will be shown with each notification
6. Use this option to select the color of the notification.
7. Save your work.

On the **Address Book Tab** users are able to enter First Name, Last Name and Email Address. This listing will show in email section of AIM 2.0 under Personal Address Book. The following explains each option:

1. Click to insert a new contact. When this is done the insert address box will open.
2. Highlight a current name and select edit to change the details of a current entry.
3. Highlight a current name and select delete to remove the entry.
4. Enter details of new contact in this area.
5. Save your work.
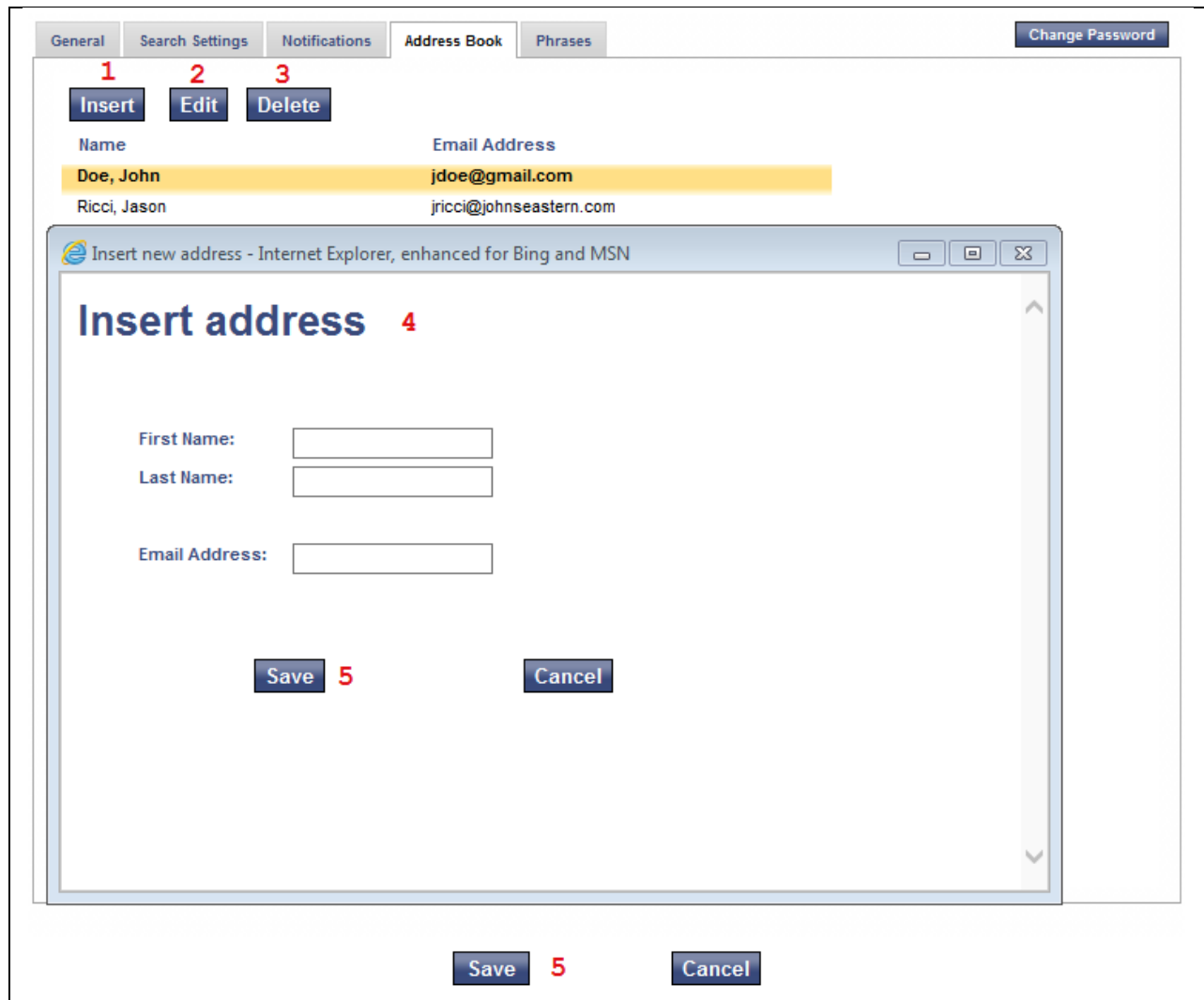
On the **Phrases Tab** users are able to enter phrases that are used in the diary and notes sections of AIM 2.0. This area can be used to enter common phrases to make data entry quick and accurate. The following explains each option:
1. Click on Insert to enter a new phrase.
    A. This will open the Insert Phrase window[A]
        1. Select if this phrase will be available in the billing section, notes section, diary section or All sections.
        2. Add a title to the phrase.

3. Add text to the phrase.
4. Save your work.
2. Highlight a current phrase entry and click edit to change title or text of entry.
3. Highlight a current phrase and click delete to remove entry.
4. This area shows all current phrase details.
5. This areas show higlighted phrase text.
6. Save your work.

Home Menu

The home menu contains links to the following: Workbench, Claim Search, Diary Audit and Dialogs.
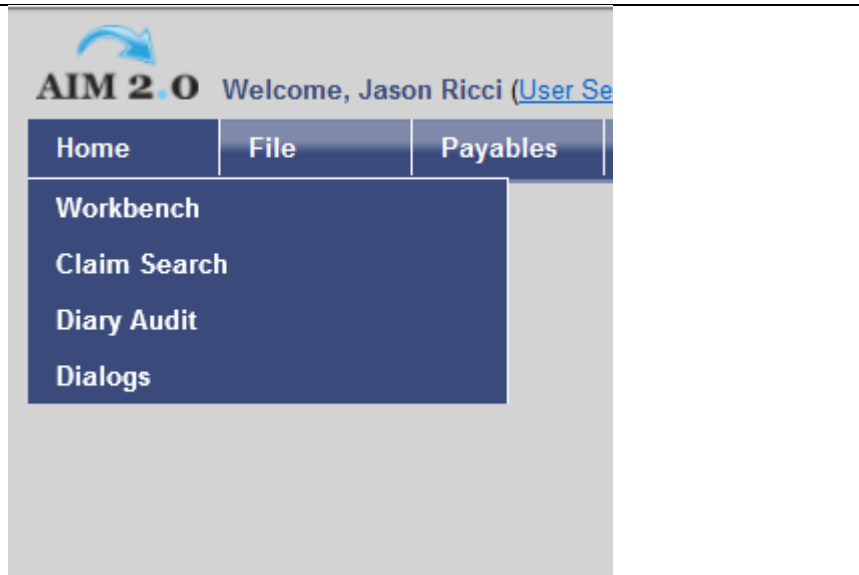
Workbench

This link will open your workbench which shows any open claims. Each claim is shown as a tab inside the main AIM screen. The active claim's tab will be white while others will be grey. Click on any tab to view that claim or click on the "X" to remove the claim from your workbench.
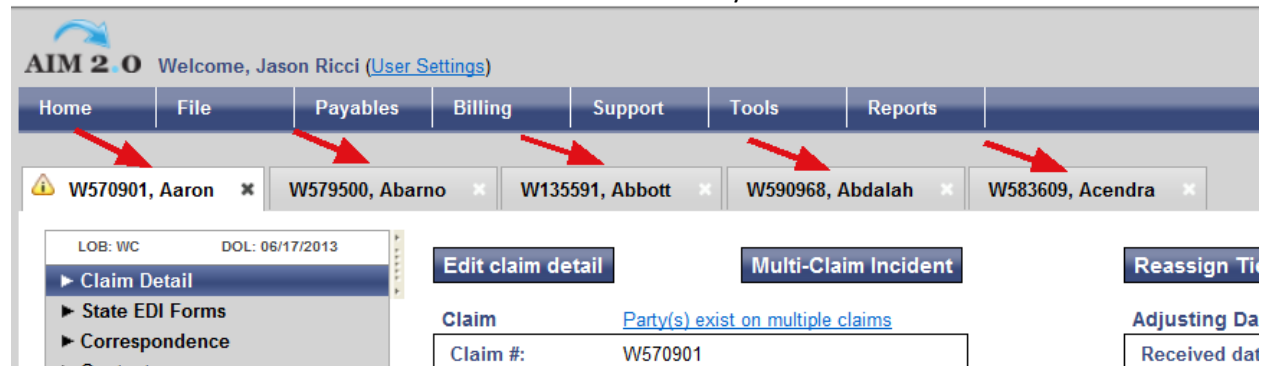
Claim Search

This link will open the claim search window. This window allows you to search for a claim by any number of claim and/or party related fields. Please note when searching on Claim status (1) if you would like to see claims that are currently open please select Open/Reopened (selecting Open will not show claims that were closed and then reopened).   Use the Tier filter (2) to search for claims based on company or company tier level.

Once you have completed your seach, click on the claim # (1) to open the claim on your workbench or check multiple claims (2) and click Open claims (3) to add all selected claims to your workbench.

Diary Audit

This link will open the dairy audit screen. This screen will list all open diarys. You can search your diarys based on status, type, LOB, Handler, date range, supervisor or client. This screen also allows you to work, advance or delete a diary. Working a diary will mark it as complete and allow you to set a new date for the next diary. Advancing a diary moves the due date but does not record it as being worked. Deleting a diary should be used if the diary was entered in error.

Dialogs

This link will open the dialog screen. Dialogs are used like an instant message. They can be linked to a claim but also can be general messages not linked to a claim. The dialog screen allows you to search all dialogs based on type, status, from, from date, to and to date. From this screen you can also create new dialogs, reply, forward, mark read, or delete existing dialogs and also assign a claim # to a dialog.

File Menu

The File menu contains links to: Add Claim (Non WC), First Notice (Non WC), FROI Entry (WC), SVAR Entry, FNOL Maintenance, Delete Claim, Move Claim, Change Claim LOB, Delete Party, and Change Branch.

Please note: there are separate documents that outline each of the different entry modules. If you require this documentation please reach out to the JE Help Desk.
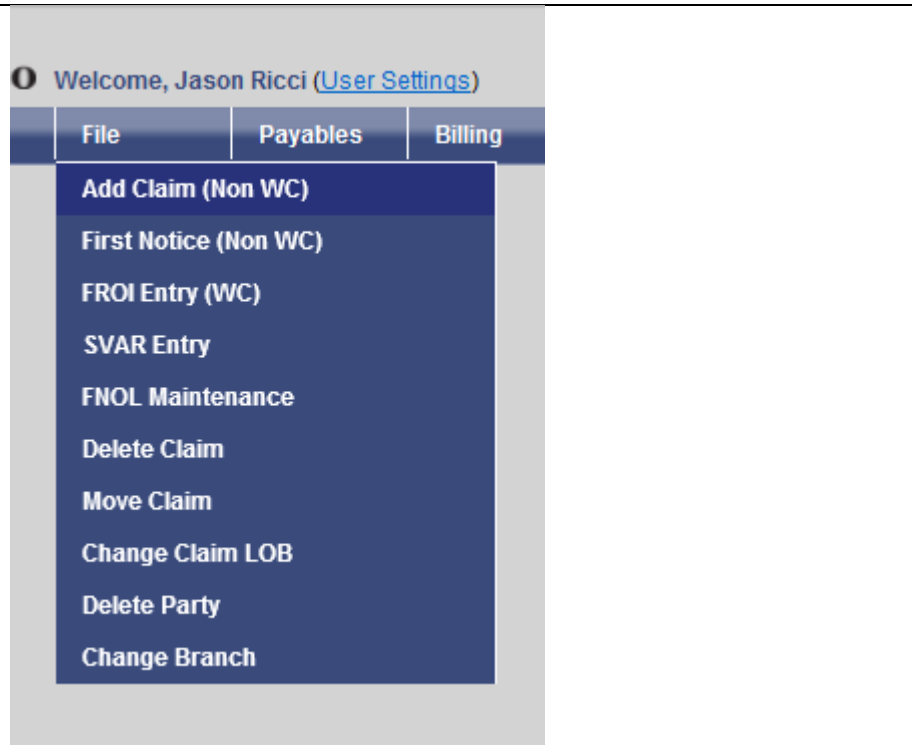
FNOL Maintenance
This area is used to assign claims staff to notices that have been entered by our clients.

Delete a Claim
This menu item allows an admin to delete a claim. Enter the claim # and click find, if claim passes required validation for deletion the claim will be deleted. If it does not, a message will be displayed to let the user know why it was not deleted.

Delete claim

Claim number: W135591   [Find]

Move a Claim
This menu item allows an admin to move a claim from one client to another.

To move a claim enter the claim # and click find. Verify the claim info and click next.

Move Claim

Move claim
Step 1 of 3

Claim number: W135591   [Find]

Filehandler claim number:	W135591	Status:	Open
Tier claim number:		Received:	5/31/1998
Handler:	Former Client	Reported:	5/31/1998
Tier company ID:	FORMER COMPANIES	LOB:	Workers Compensation

[Cancel]   [Next >]

Select the new client and click next.

Move Claim

Move claim
Step 2 of 3

Client: DEMO - 000163

[Cancel]   [< Back]   [Next >]

| Select the proper tier level under the new client. | **Move claim**

 Step 3 of 3

 DEMO

 >   (TIER2) DEMO WC
    >   (TIER3) Division 1
       ⦿   (TIER5) Department 2
       ○   (TIER5) Department 4
    >   (TIER3) Division 2
    >   (TIER3) Division 3
    >   (TIER3) Division 4
    >   (TIER3) Division 5

 [Cancel]   [< Back]   [Move claim] |

Change Claim LOB
Use this item to change a claims LOB that was entered in error.
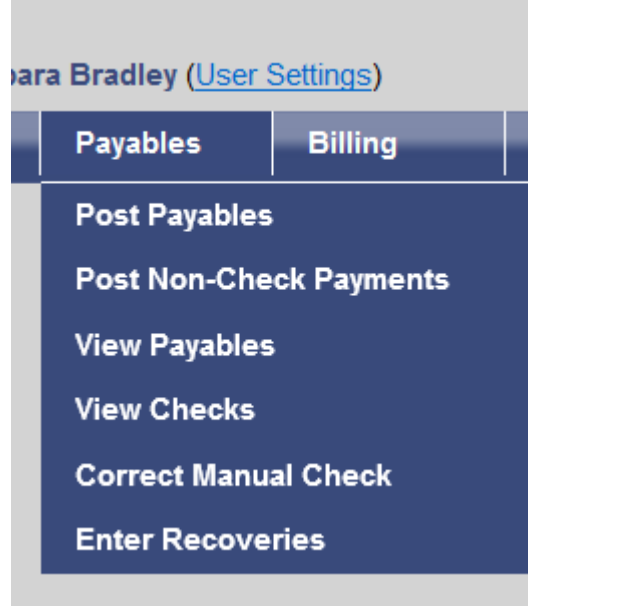
Delete A Party
Use this area to delete a party from a claim with multiple claimants. This is only valid on non-wc claims.

Change Branch
Use this area to move a claim to a different branch.

Payables Menu

The Payables menu contains links to Post Payables, Post Non-Check (manual) Payments, View Payables, View Checks, Correct Manual Check and Enter Recoveries. Please note: Each of these items is at a system wide level so when you click on any of this items you will need to enter a claim # to proceed. Each of these items can also be done within a claim. A detailed description of each of these items will be outlined within the claim section of this document.	ara Bradley (User Settings) **Payables** **Billing** Post Payables Post Non-Check Payments View Payables View Checks Correct Manual Check Enter Recoveries
Post Payables Use this menu to post a payment to a vendor, claimant or dependent.	
Post Non-Check Payments Use this menu to post manual payments for record keeping only. Checks will not be created.	
View Payables Use this menu to view all payables on a single claim.	
View Checks Use this menu to view only check payments on a claim.	
Correct Manual Check Use this menu to correct a non-check payment error.	
Enter Recoveries Use this menu to enter recoveries to a claim.	

Support Menu

Please see the Admin Guide for use of this menu.

Tools Menu

Please see the Admin Guide for use of this menu.

Reports Menu

From the Reports menu you can access the online report library as well as the Data Analysis Dashboard.	**Reports** **FileHandler Reports** **Data Analysis Dashboard**
Reports This area give access to all Adhoc reports. These reports can be run anytime and provide real time data. Most reports can be produced in Excel or PDF. Please note: Report access is controlled by security roles. If you require access to reports you do not have listed please contact the JE Help Desk.	**Report Menu** + Claim list reports + Claim financial reports + Reserve log reports + Notes reports + Diary reports + Feature count reports + Claim miscellaneous reports + Party miscellaneous reports + Payable reports + Payment register reports + Payable misc. reports + Billing reports + Labels (Avery 5162) + JE Loss Runs + JE Claim Lists + JE Payment Check Register Reports + ALA/Excess Reports + Client Billing + OSHA reports + Bordereaux Reports + Internal Reports + Actuarial + Stewardship Reports + Miscellaneous Reports + Accounting Exports + Data Exports

Data Analysis Dashboard This area gives access to a library of dashboards. Users are able to select which default dashboard they would like to see and are then able to scroll through the library to get a snapshot of their data. To scroll through the assigned dashboards use the arrows (1) or the drop down (2). To set a default dashboard scroll to that dashboard and click the Set Default button (3). Click the PDF Report button (4) to view dashboard data in a report format.

Claim Navigation

Once you have added a claim to your workbench you will then be given a tree view of the different claim components. These components include:
   1. Claim Detail
   2. State EDI Forms
   3. Correspondence
   4. Contacts
   5. Parties
   6. Potential Recoveries
   7. Litigation
   8. Billing
   9. Payables
   10. Reports
	LOB: WC **DOL: 06/17/2013**
	► Claim Detail
	► State EDI Forms
	► Correspondence
	► Contacts
	Parties
	  ► Aaron, Robert
	► Potential Recoveries
	Litigation
	  ► Aaron, Robert
	► Billing
	► Payables
	► Reports

Claim Detail This Menu contains Notes, Diary, Policy, Claim Auxiliary, Special handling, Accident facts, Employment, Maintenance Log, Claim Additional, Claim Alerts and Activity Markers screens. A detailed description of each area is given below.	**LOB: WC** **DOL: 06/17/2013** ▼ Claim Detail Notes Diary Policy Claim Auxiliary Special handling Accident facts Employment Maintenance Log Claim Additional Claim Alerts Activity Markers

Claim Detail Screen This area of the claim shows items that are specific to the entire claim and do not relate directly to a party. The main claim detail screen includes information including: Claim #, LOB, Client, Adjusting Dates (loss date, received date, reported date, date entered, last activity, etc.) and Adjusting Team. On this screen you can edit the claim detail (1), assign the claim to a Multi-Claim Incident (2) and will receive a notification if the party exists on multiple claims (3). Click on the link to view the other claims.

1   **2**

| Edit claim detail | Multi-Claim Incident | | Reassign Tier | Snap Shot |

3

Claim   Party(s) exist on multiple claims   **Adjusting Dates**

Claim			Adjusting Dates	
Claim #:	W570901		Received date:	06/20/2013 12:00:00 AM
LOB:	Workers Compensation		Reported date:	06/20/2013 12:00:00 AM
Category:	Reserved		Loss date:	06/17/2013 11:00:00 AM
Client:	City of Coral Gables		Date entered:	06/26/2013 12:00:00 AM
Client contact:			Closed date:	
Prev/Other claim #:			Reopened date:	
Bill to Client	City of Coral Gables Crime Surety Fid		Last Activity:	06/10/2014
Status:	Open		Next Diary:	06/26/2014
Closure method:			TPA Knew LT Dt:	08/28/2013
Loss causation:	Using Tool or Machinery		Award Order Dt:	
Claim status:			Date Purged:	Not purged
Catastrophe flag:	Yes			
Catast. Code:	Non Catastrophe		**WC Related**	
Benefit state:	FL		State juris #:	4456023
Lost time:	Yes		In hearing:	No
Sub Agent:			SIC Code:	0
Surety Lines:	No		Pharmacy Export: SPNET Export:	Pending
			Bill Review Export:	Pending

Death Date exists on this claim

Adjusting Team

Branch:	Special Account Services - 036	Team Asst:	Barb's, Team Assist
Adjuster:	Avendano, Ana	Medical Mngmt:	Harrington, Diane
Entered By:	Marotta, Donna	Supervisor:	Bradley, Barbara

Notes In this screen you can view and add notes to a claim. Use the filter options at the top of the screen to search notes on selected criteria. You can also click on the column headings to sort the notes by that column.

Party:		From date:		Note type:			
Handler:		To date:		Note text contains:			

Displaying 1 - 50 of 81 notes.   Note Class:

[Insert]   [Email] [PDF Report] [HTML Report]   [Clear filter] [Apply filter]

Party	Handler	Note type	▼ Note date	Class	Note text
Robert Aaron	Harrington, Diane	Medical	4/23/2014 3:46:22 PM	50	Created MCC of future treatment to Dr Robla EE had c
Robert Aaron	Avendano, Ana	Administrative	3/25/2014 4:14:29 PM	70	90 Day Audit/ File review Robert Aaron is a 57 y/o male
Robert Aaron	Harrington, Diane	Medical/MC- Savings	3/19/2014 12:09:30 PM	50	* NCM REVIEW FOR MED COST SAVINGS* No addition
Robert Aaron	Harrington, Diane	Medical	3/19/2014 12:09:17 PM	50	NCM Review 57 yr old COCG auto repair employee inju
Robert Aaron	Goff, Brenda	Administrative	3/14/2014 8:05:25 AM	80	Reviewed medications as it relates to claim. Notify Tme
Robert Aaron	Humberson, Sarah	Administrative	2/14/2014 11:44:49 AM	40	sent DWC-4 to ee, client & division. MMI copay ltr maile
Robert Aaron	Avendano, Ana	Med Authorizations	2/13/2014 10:15:11 AM	70	A decision of Approve 1x only was received by PMSI/Tm
Robert Aaron	Avendano, Ana	Administrative	2/13/2014 10:06:24 AM	70	The clmt has reached overall MMI with a 2% PIR as of 1
Robert Aaron	Harrington, Diane	Medical	2/11/2014 10:21:38 AM	50	DWC 25 Dr Roblas MMI 2% PIR 11/22/13 1996 Florida

Created MCC of future treatment to Dr Robla EE had chondromalacia present with meniscal tear EE remains on expensive meds Meniscal repair was 8 months ago Faxed to MD

Diary In this screen you can view, insert or edit a diary. Use the filter options at the top of the screen to search notes on selected criteria. You can also click on the column headings to sort the notes by that column. To mark that a diary was worked highlight the diary, click edit, and change the status to worked. This will prompt the user to create another diary of the same type at a later date. Diaries can also be worked on the diary audit screen.

Party:		Handler:		Diary type:	
From:		To:		Status	Open

[Insert] [Edit]   [Email] [Report]   [Clear filter] [Apply filter]

Party	Handler	Diary type	▼ Diary date	Status
Robert Aaron	Avendano, Ana	Reminder-General	06/26/2014	Open
Robert Aaron	Harrington, Diane	Reminder-General	06/19/2014	Open
Robert Aaron	Bradley, Barbara	Reminder-General	06/13/2014	Open
Robert Aaron	Williams, Rosalind	Payment	06/05/2014	Open
Robert Aaron	Harrington, Diane	Reminder-General	05/01/2014	Open
Robert Aaron	Bradley, Barbara	Performance Measure	09/13/2013	Open
Robert Aaron	Avendano, Ana	Next Review Date	06/26/2013	Open

Policy This area shows any excess policy information assigned to the claim.

Policy #:	64A3EX000003404		Begin Date		End Date	
Policy description:	per SH email 06/13/13		05/01/2013		04/30/2014	
Primary carrier:	Princeton Excess & Surplus(PESIC)		Claims Made:	No		
Primary holder:			Phone:			
Secondary holder:			Fax:			
Address:						
			Clash Coverage:			
			Max Maint Deduct:	No Maint Deductible		
Cancellation date:			Maint Deduct Amt:	0.00		
Agent:			Deductible amt:	0.00	Premium amt:	0.00
Agg. Reten amt:	0.00	IBNR amt:	0.10 Agg. limit amt:	0.00	Premium 2 amt:	0.00
Spec Retent amt:	500000.00	Target amt:	0.00 Med. pay Amt:	0.00	SIR report pct:	0.00
Pip amt:	0.00	Retention pct:	0.00 UM amt:	0.00		

Claim Auxiliary This area shows any special fields set up for the specific client.

Special Handling This area contains notes on any special instructions for the specific client.

Accident Facts This area shows an accident narrative and also accident location.

Edit claim accident	
Accident Narrative:	
Accident Location:	Public Works Department
Address:	2800 SW 72nd Avenue
City, State, Zip:	Miami FL, 33155
County/Parish:	Miami-Dade **Country:** USA
Premises Type:	
Post office identifiable?	Yes

Employment This area shows Employer Info, Employment Location and Job details. Use this screen to update concurrent employment information.

Employer Info

Employer Name:	City of Coral Gables
Address 1:	2801 Salzedo Street, 2nd Floor
Address 2:	
City:	Coral Gables
State:	FL
Zip Code:	33134
Federal ID:	
U.I. Number:	921190

Employment Location

NAICS Code:	
Location #:	
Phone:	(305) 460-5530
Address 1:	
Address 2:	
City:	
State:	
Zip Code:	

Job

Job Title:		Date Hired:	10/20/2003
Occupation Code:	8380 - Auto Service/Repair	Date Terminated:	
Employment Status:	Regular/Full-time Employee	Volunteer?:	No
Employee ID:			

Concurrent Employer

	Employer Name	Phone	Wage	Statement Received
1			$0.00	
2			$0.00	

Maintenance Log This area shows all transactions related to State EDI fillings. Use the Validate Claim button to verify that all required data is completed to ensure proper EDI filing.

	Validate Claim

Report Type	Code	Date	Sent Date
Subsequent Report of Injury	IP - Initial Payment	08/28/2013	08/29/2013
First Report of Injury	00 - Original	08/28/2013	08/29/2013
Subsequent Report of Injury	02 - Change	09/13/2013	09/13/2013
Subsequent Report of Injury	S1 - Suspension, RTW or RTW Qualified	09/13/2013	09/14/2013
Subsequent Report of Injury	SA - Sub-Annual	12/17/2013	12/18/2013
Subsequent Report of Injury	02 - Change	02/13/2014	02/13/2014
Subsequent Report of Injury	RB - Reinstatement of Benefit	02/13/2014	02/14/2014
Subsequent Report of Injury	S7 - Suspension, Benefits Exhausted	02/13/2014	02/17/2014
Subsequent Report of Injury	02 - Change	05/28/2014	
First Report of Injury	02 - Change	05/28/2014	
Subsequent Report of Injury	02 - Change	05/28/2014	
Subsequent Report of Injury	02 - Change	05/28/2014	

Claim Additional This area contains miscellaneous fields such as NCCI Injury Code and Type of Loss. Many fields on this screen are not used by JE.

Injury Code:	09 - Permanent Partial Disability - N/A: CA, MI, NJ
Loss Coverage Act:	
Type of Loss:	01 - Trauma
Type of Recovery:	
Type of Claim:	
Type of Settlement:	
Reserve Type Code:	
Soc Sec Offset:	

Save

Claim Alerts This area lists all active claim and payment alerts. It also allows users to create, edit and delete alerts based on their security role. To create an alert click on the Insert button and select a type (1) from the drop down. (This controls when the alert is shown.) Claim alerts are shown each time a claim is opened and payment alerts are show when you enter the payables screen. Next enter a title and a message.

Activity Markers (Performance Measures) This area shows all performance measures and their due dates. To mark an item as completed check the completed box and click Complete.

Party:		From:		To:				
Description:		Status:	Not Completed					

Clear filter | Apply filter | Complete

Button Text	Description	▲ Due date	Party	Completed Date	Completed User	Completed?
Initial Contact	Adjuster Initial Contact	06/18/2013	Aaron, Robert			☑
Subro Eval	Adjuster Subrogation Evaluation	07/01/2013	Aaron, Robert			☐
Reserve Review	Adjuster Reserve Review	07/17/2013	Aaron, Robert			☐
Diary Review	Adjuster Diary Review	07/17/2013	Aaron, Robert			☐
Supervisor Review	Supervisor Review	09/16/2013	Aaron, Robert			☐

Instruction text:
Contact with Client on liability claims will occur on
the same day as the receipt of the notification of loss.

Click Activity Marker to indicate that contact has been made.

State EDI Forms

This area shows the **DWC1, DWC4, DWC12** and **DWC13**. It will also allow you to print and submit these forms to imaging.	▼ State EDI Forms **DWC 1 - First Report** DWC 12 - Notice of Denial DWC 13 - Claim Cost Report	

Correspondence

This area of the system contains links to Letters, Email and Dialog	▼ Correspondence Letters Email Dialog	
Letters This area shows a list of all letters that have been generated on this claim. A user can generate letters which will then print, submit to imaging or both. Users can also edit existing letters or Email a letter. The filter at the top of the screen can be used to filter the list of letters. The list can be sorted by clicking on a column heading.		

| Document type: | [ ] | From: | [ ] | | |
| User: | [ ] | To: | [ ] | Letter text contains: | [ ] |

Create new letter **Edit Letter** **Email** **Clear filter** **Apply filter**

Document Type	Letter	User
State Forms	**DWC-4**	**Ana Avendano**
Medical Letters	Doctor - MMI - CoPayment	Ana Avendano
Claimant Letters	Claimant MMI Co-Payment	Ana Avendano
State Forms	DWC-4	Ana Avendano
State Forms	DWC-4	Ana Avendano
State Forms	DWC-4	Ana Avendano
Claimant Letters	Appointment Letter - Non IME	Sarah Humberson
State Forms	DWC-13	Ana Avendano
State Forms	DWC-4	Ana Avendano

Email This area shows all Emails that have been sent from this claim. The filter at the top of the screen can be used to filter the list of emails and list can be sorted by clicking on a column heading.
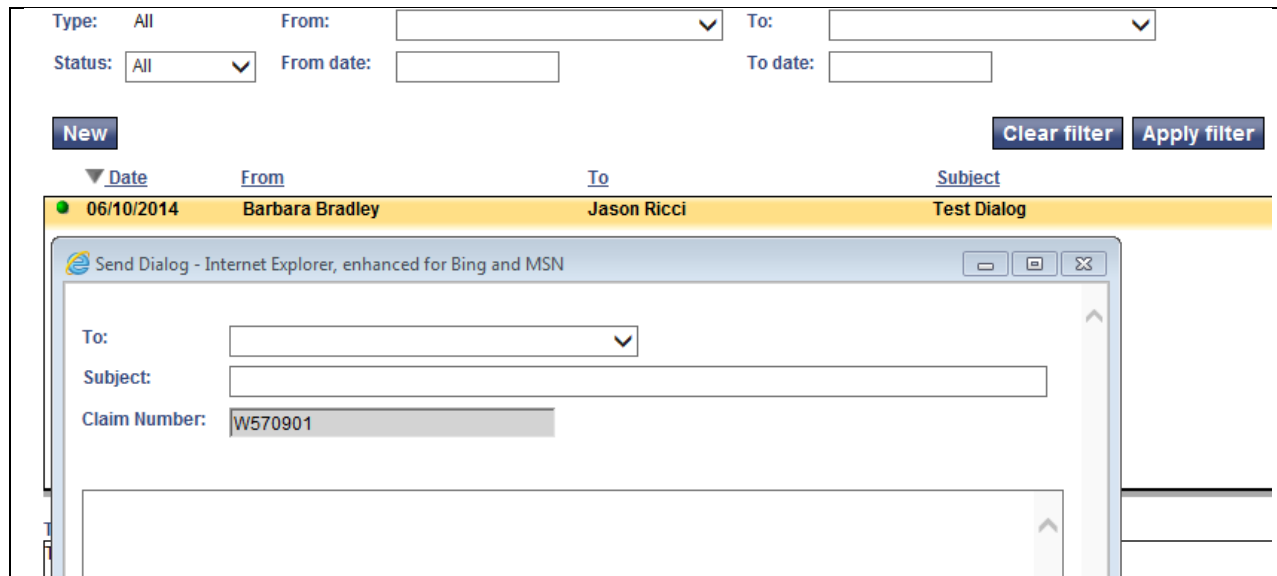
| Type: | Sent | From: | [ ] | To: | [ ] |
| | | From date: | [ ] | To date: | [ ] |

New **Reply** **Forward** **Delete** **Clear filter** **Apply filter**

From	To	▼ Date	Subject	Attachment
Barbara Bradley	jricci@johnseastern.com	06/10/2014	Test (Claim #:W570901, Claimant:Robert Aaron, Usern	

This a test e-mail.

Dialog This area shows all claim dialogs. Claim dialogs act like an instant message between two users in AIM 2.0. To send a dialog click on New button, select the To: field, enter a subject and text and hit send. The filter at the top of the screen can be used to filter the list of dialogs and lists can be sorted by clicking on a column heading.

Contacts

This area of the system shows Client/Tier, Party Professionals and Witnesses.	
Client/Tier This screen is view only and shows detailed information about the client tier that the claim is assigned to. It also shows the address information of the client.	

Party Professionals This screen lists Medical, Legal and other party professionals. The doctors from AIM were converted to this screen.

Witnesses This screen allows a user to view, insert, edit, delete or Email a witness.	

Parties

This area contains information that is specific to the party on a claim. On non-WC claims there can be multiple parties per claim. On WC claims there will only be one party. Each area of the parties screen is outlined below.	

Party's Main Screen This screen contains 5 areas: Mailing Address, Claim Related, Contact Info, Personal Info and Status of Adjusting Activities. The Claim Related area shows items related to the status and coverage of the party. From this screen you can edit details of the party or close the party.

Missing Medicare Information   SS#:   799-14-3457   Edit   Close party

Name: **Roberta M Roser**   Copy Name/Address

Mailing Address

Address:	6015 Resource Ln.
City, State, Zip:	Lakewood Ranch FL, 34202
Country:	
Use Alternate?:	No
In Care of:	
Address:	
City, State, Zip:	,

Claim Related

Party status:	Open
Closed date:	
Reopened date:	
Claim Coverage:	Indemnity
In litigation:	Yes
In subrogation:	No
Loss condition:	
Death date:	
Death result of injury?:	
Tier Claim Num:	

Contact Info

Home phone:	(941) 555-1213
Work phone:	
Cell phone:	(407) 620-6201
Cell carrier:	Verizon
Allow Text?:	Yes
Email address:	jason2@jason.com
Email address 2:	
Notes:	
Home: 9415551212 Available	

Personal Info

Gender:	Unknown	
Marital status:	Married	
Date of birth:	12/06/1963	
Age at time of Injury: 51		Current Age: 54
# of dependents: 0		DNR Override?
SS# if DAN:		
Employee ID Type:	Social Security Number	
Beneficiary?:	Needs information.	

Accident Facts This screen contains Body, Nature, Cause info as well as the Type of Loss and Accident description.

Robert — Claimant 1

[Edit party accident]

Body part	Nature of Injury	Cause of Loss
53 Lower Extremities - Knee	49 Specific Injury - Sprain or Tear	59 Strain or Injury By - Using Tool or Machinery

Type of Loss: 01 - Trauma

Accident description: Rear brake drum jammed, tried to beat it off with two pound sledge hammer,

Dependents This screen lists all dependents for the particular party. With the proper security permissions you are able to insert, edit and delete dependents from a party.

Robert — Claimant 1

[Insert] [Edit] [Delete]   [Email]

Name	SSN	Relationship	Birth Date	Age
John Doe	555-55-5555	Brother/Sister, 1st Born	01/01/1995	18

Detail:

Address:	123 1st St	Home phone:	(401) 555-5555 5
	Bradenton FL 55555	Work phone:	(555) 555-5555 55555
		Other phone:	(555) 555-5555 55555
		Benefit termination date:	
Dependency:	Total		

Compensability This screen list full and partial denial, full and partial settlement information as well as representation information.

Robert   **- Claimant 1**

Edit party compensability

Denied (Full):	Partial Denial (Ind):	Denial Recission Date:
Medical Denial:	Medical Denial Reason:	

Body Part:	Code & Description	Added By	Date Denied

Full Settlement:

Partial Settlement:	Partial Settle Reason:

Body Part:	Code & Description	Added By	Date Settled

Date of representation:

Represented:	No	Controversion:	No
Date DW3 received:		Fraud indicator:	Not fraudulent

Denial reason description:

Reserve Worksheet This screen is used to produce a reserve worksheet. From this screen you can print or send the worksheet to imaging.

Print   Send to Imaging   Print/Send to Imaging

Reserve Evaluation Worksheet

AWW: 1107.75   Comp Rate: 738.50

Indemnity	Paid to Date	Number	Expected	Amount	Total Incurred
TTD	738.54	0	Wks X	0.00	738.54
TPD/WL	0.00	0	Wks X	0.00	0.00
PTD	0.00	0	Wks X	0.00	0.00
Death Benefits	0.00	0	Wks X	0.00	0.00
Settlement	0.00	0	Wks X	0.00	0.00
Impairment Benefits	1107.76	0	Wks X	0.00	1107.76
Other	0.00	0	Wks X	0.00	0.00

Total Reserve: 1846.30

Medical		Future		Total Incurred
Physician	3839.52	0.00		3839.52
Hospital	3335.04	0.00		3335.04
Physical Therapy/Drug	7973.05	0.00		7973.05
Rehab	0.00	0.00		0.00
Other	0.00	0.00		0.00

Total Reserve: 15147.61

Other		Future		Total Incurred
Investigation	0.00	0.00		0.00
Defense Attorney	0.00	0.00		0.00
Other	350.00	0.00		350.00

Total Reserve: 350.00

Reserve Update This screen is used to update, open and close reserves on a party.

Robert - Claimant 1

Handler: Bradley, Barbara   Reserve Date: 06/11/2014   Time: 03:22:51 PM

Reserve Type		New Outstanding	Paid + Open	New Incurred
Expense				
Status:	Open	Loss: 1650.00	350.00	2000.00
Handler:	Aaron, Carol			
Indemn				
Status:	Open	Loss: 5153.70	1846.30	7000.00
Handler:	Aaron, Carol			
Medical				
Status:	Open	Loss: 29752.39	15247.61	45000.00
Handler:	Aaron, Carol			
	Total Line:	36556.09	17443.91	54000.00

Save   Cancel

Multi-Claim This screen shows all claims for the current party and allows a Medicare admin to mark claims that are not reportable to CMS. It also shows any CMS errors.

	Claim #	Loss Date	CMS Valid	Description
☐ 🔴	VV419985	07/17/2008	No	Blowing off dust from vehicle and particle flew into eye.

CMS Errors
98

Do Not Report Claims

Weekly Wage This screen shows the party's weekly wage information and allows a user to update this information. It also calculates average weekly wage as well as base compensation rate and shows any concurrent employment information.

Robert   - Claimant 1

Edit party wage

Weekly Wage

Effective Date	Wage Report Received	Last Paid Date
11/23/2013	08/13/2013	

Base Wage: $1,107.75

PER   Week

Hours per Day: 0.00   Days per Week: 5

Hrs per Week: 0.00

Base Weekly Wage:	1107.75
Concurrent Wage:	0.00
Average Wage:	1107.75
Base Comp Rate:	738.54
Calculated Comp Rate:	738.50
Max Comp Rate:	816.00
Gross Weekly Wage:	738.50

Concurrent Employment

Employer 1	Employer 2
Wage	Wage
Statement Received	Statement Received

A-Adjustments, C-Credits, R-Redistributions (does not effect Net Weekly Wage)

Net Weekly Wage: 738.50   Effective Date: 5/28/2014

Waiting Week/Disability Days This screen shows waiting week days as well as disability milestone dates.

The injured employee is currently Returned to Work
according to the entered information.

Waiting Week

	06/17/2013	Last Day Worked
1	08/21/2013	Initial Date Disability Began
2	08/22/2013	
3	08/23/2013	
4	08/24/2013	non-consecutive waiting period
5	08/25/2013	Not Applicable
6	08/26/2013	
7	08/27/2013	
8	08/28/2013	8th Day of Disability

Disability Milestone Dates

Last Worked:
Disability Began:
Return to Work:
Return to Work Type:
Same Employer:
Physical Restrictions:

History of "Current" Disability Milestones

Activity	Date	SE	PR	Period

8th Day of Disability: 08/28/2013   Date TPA had Knowledge of Lost Time (8th Day):   08/28/2013

Save

Employer/MMI This screen lists salary in lieu of compensation information as well as MMI date.

Robert   - Claimant 1

Edit Employer/MMI

Employer Agrees to Compensate:	
Employer Agrees with Desc:	Yes
Paid for Lost Day:	Yes
Injury Due to Work:	No

Continue Salary:	No
Full Salary Begin Date:	
Benefit Type/Description:	
Full Salary End Date:	

MMI Date:	11/22/2013
PI Minimum Payment Indicator:	
Impairment Percentage:	2.00%

Reduced Benefit Amt Code:

Medical/OSHA This screen shows information regarding initial treatment, surgery and OSHA.

Robert   · Claimant 1

Edit party medical

Initial treatment:		Severity code:	
Prior existence:	No	Illness/Sickness:	
MCO:		OSHA?:	Yes
Surgery required:	No	Private OSHA case:	No
Authorized by Employer?:	Yes	Year last exposed:	0
Hospital Name:	Physician Health Center	Employee Was Treated in an Emergency Room:	No
Medical Provider:		Employee Was Hospitalized Overnight as Inpatient:	No

Lost Days This screen list the first 8 days of disability as well as any other lost days on the claim. With the proper permissions users are able to delete lost days.

Robert   - Claimant 1

Date Claim Admin Had Knowledge
of Lost Time (8th day of disability):   08/28/2013   ☐   **8 days of disability**   Delete

Reason	Begin	End	# of days	Date Entered	Entered By		
Lost Days	08/21/2013	08/28/2013	8	08/28/2013	Ana Avendano	1	08/21/2013
						2	08/22/2013
						3	08/23/2013
						4	08/24/2013
						5	08/25/2013
						6	08/26/2013
						7	08/27/2013
						8	08/28/2013

Displaying 1 - 3 of 3 Lost Days records.

Days (with payment)   Total Loss Days: 35   Weeks: 5   Days: 0

Reason	▲ Begin	End	# of days	Date Entered	Entered By
Lost Days	08/28/2013	09/03/2013	7	09/03/2013	Ana Avendano
Lost Days	11/23/2013	12/20/2013	28	12/20/2013	Ana Avendano

MSA Savings This screen shows any MSA savings. Users with permissions have the ability to insert, edit and delete MSA savings records.

Robert   Claimant

Insert   Edit   Delete

	Total Requested:	$30.00
	Total Approved:	$10.00
	Total Savings:	$20.00

MCA Code	Date Entered	Entered by	Requested Amount	Approved Amount
Authorization	06/11/2014	Bradley, Barbara	$30.00	$10.00

Detail:

Estimated LOD Min	10	Max	40	Days
Actual LOD Min	10	Max	10	Days
Requested Days	2	Requested $:	30.00	
Approved Days	1	Approved $:	10.00	

Notes
This is a test.

Coverage History This screen shows any changes to coverage.

Party Coverage History

Change Date	Old Coverage	New Coverage	Changed By	Man Care Effective Date
06/26/2013	Unassigned	Medical Only	Donna Marotta	06/26/2013
08/23/2013	Medical Only	Indemnity	Tabetha Pittman	08/23/2013