

Visibility of claims in the Claims Portal:

A guide for Claimant Representatives


Updated March 2019: New symbols introduced; types of user profiles updated


The guide shows how actions taken by claim handlers affect the visibility of claims and covers the following:

- 1 – Overview of available user profiles
- 2 – Claim is not allocated to a specific user
- 3 – Claim is allocated to a specific user

Visibility Key for the following slides

Full access to a claim to search, view and work on: 

Access to search and view a claim, but not to work on: 

No access (claim not found if searched for): 

1 – Overview of available profiles

This guide covers the usage of the following Handling profiles:

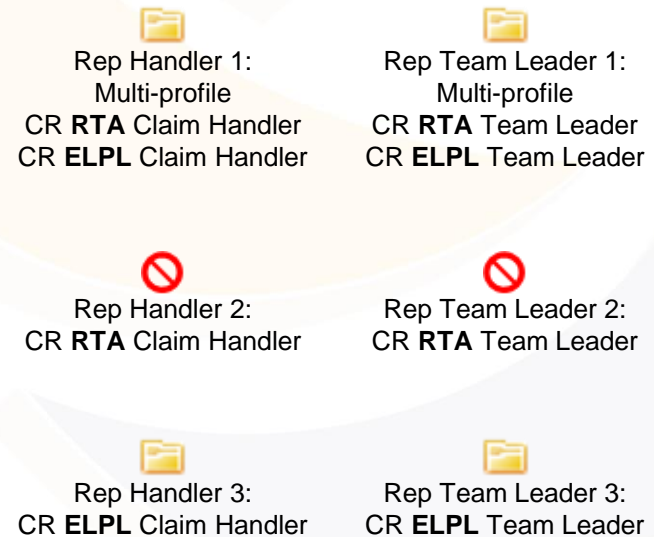
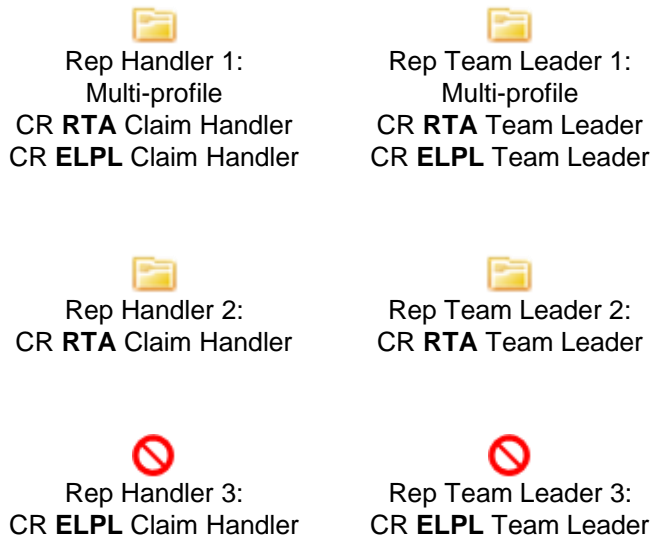
- CR RTA Claim Handler
- CR ELPL Claim Handler
- CR RTA Team Leader
- CR ELPL Team Leader

If your organisation has been registered for RTA claims only, please use the RTA specific profiles.

If your organisation has been registered for EL/PL claims only, please use the EL/PL specific profiles.

If your organisation has been registered for both RTA and EL/PL, please consider how you split the work between RTA and EL/PL. If a user handles both types of claims, you need to assign both the RTA and EL/PL profiles to the user (multi-profile).

The visibility of an RTA and an EL/PL claim is shown below:



Scenario 1 - Claim is not allocated to a specific user

In this scenario there are two users:

Rep Handler 1 and *Rep Handler 2*. Both are assigned the profile *CR RTA Claim Handler*.

Notes: The organisation is only handling RTA claims. The same rules apply if the organisation is handling ELPL claims and the *CR ELPL Claim Handler* profile is used.

 Rep Handler 1
(CR RTA Claim Handler)



1. Rep Handler 1 accesses the CNF. The claim is automatically locked to Rep Handler 1.


2. While the claim is locked to Rep Handler 1, Rep Handler 2 cannot see it in the worklist.

My Worklist

 Rep Handler 2
(CR RTA Claim Handler)


3. Rep Handler 2 can see the claim using the Search.

Search

 Rep Handler 2
(CR RTA Claim Handler)

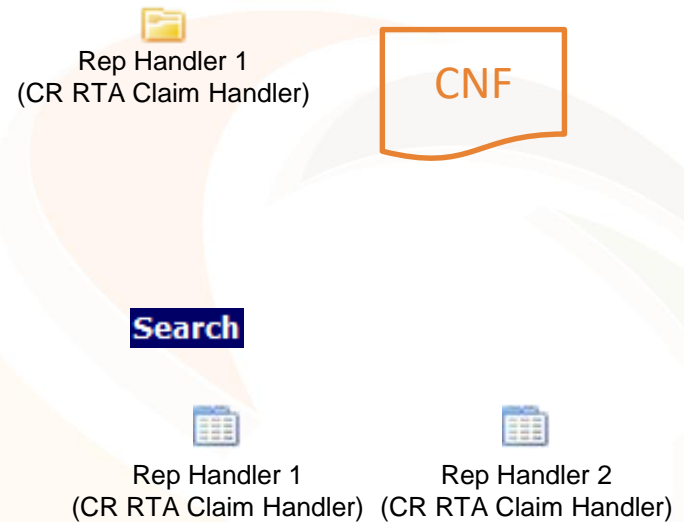
4. Rep Handler 1 can use the *Unlock* function to unlock the claim. It then becomes visible in Rep Handler 2's work list.

My Worklist

 Rep Handler 2
(CR RTA Claim Handler)

1. Rep Handler 1 completes the CNF and sends to the Compensator

2. The claim disappears from the reps' worklist but both Rep Handler 1 and Rep Handler 2 can find it via the Search, but they cannot work on it while it is with the Compensator.



3. The Compensator submits the Liability decision

4. The claim appears in the reps' worklist, visible to both Rep Handler 1 and Rep Handler 2.

My Worklist



Rep Handler 1
(CR RTA Claim Handler)



Rep Handler 2
(CR RTA Claim Handler)

Scenario 2 - Claim allocated to specific CR user

In this scenario a *CR RTA Team Leader* uses the functionality to assign a claim to a user.

In addition to *Rep Handler 1* and *Rep Handler 2*, there are two *CR RTA Team Leaders*: *Rep Team Leader 1* and *Rep Team Leader 2*.

Notes: The organisation is only handling RTA claims. The same rules apply if the organisation is handling ELPL claims and the *CR ELPL Team Leader* and *CR ELPL Claim Handler* profiles are used.

1. When the claim is with the Claimant Rep, a Team Leader can allocate the claim to a user (for example Rep Handler 2).

2. The claim only appears in Rep Handler 2's work list.

3. Other Rep Handlers and Team Leaders can find the claim via Search, but cannot work on it.

4. Rep Handler 2 works on the claim and sends the claim to the compensator.





5. When the compensator responds, the claim will only appear in Rep Handler 2's worklist and not in anybody else's worklist.

6. All Rep Handlers and Team Leaders can find the claim via the Search. Only Rep Handler 2 can work on it.



7. Only Rep Handler 2 can remove the allocation by *De-allocating* the claim and unlocking it. The claim will then appear in the worklist for both Handlers and Team Leader(s).



8. Any Team Leader can use the *Login as another User* function from the *Tools* menu to access the claim and re-assign it.

My Worklist



Rep Handler 1 (CR RTA Claim Handler)  Rep Handler 2 (CR RTA Claim Handler) 


Search

Rep Handler 1 (CR RTA Claim Handler)  Rep Team Leader 1 (CR RTA Team Leader) 

Rep Handler 2 (CR RTA Claim Handler)  Rep Team Leader 2 (CR RTA Team Leader) 

My Worklist

Rep Handler 1 (CR RTA Claim Handler)  Rep Team Leader 1 (CR RTA Team Leader) 

Rep Handler 2 (CR RTA Claim Handler)  Rep Team Leader 2 (CR RTA Team Leader) 