Claims Analyst User Guide

This user guide provides instructions on how to navigate the Employee Injury/Illness reporting and claim process as an Illness and Injury Reporting Claims Analyst.

Who Creates Reports

Injury & Illness Reporting can be configured for decentralized reporting, allowing anyone to create a report, or centralized reporting, restricted to specific personnel like Worker's Comp. This affects who creates the report only; all other claims processes are the same. In a centralized configuration, only Worker's Comp personnel see the "Report Employee Injury or Illness" button on the RSS homepage.

Reporter Types and Permissions

This section covers centralized and decentralized permissions. Based on the **Reporter type,** relevant search and selection data from the employee's records is made available on the form and helps the person navigate through the report.

- If an **employee** initiates the report, their relevant employee and department data is delivered to the report. Supervisor information can be chosen from the search list
- If the **employee's supervisor** initiates the report, the relevant employee, supervisor and department data is delivered to the report
- If a **bystander** reports on the employee's behalf, they will be able to search for the employee and supervisor name, but are not provided any relevant persons or department data

Type	Role	Permission
Injured/ Ill Person (Employee)	• The employee who sustained a job-related injury or illness	• Create an employee injury/illness report • Review own employee injury/illness report(s)
Supervisor	• The direct supervisor of the injured/ill employee • Another supervisor in the injured/ill employee's department	• Create an employee injury/illness report • Review an Employee Injury/Illness Report for any employee they supervise

		• Perform an investigation on a report where they are named as supervisor
Bystander	• Neither the injured/ill employee nor the injured/ill employee's supervisor	• Create an Employee Injury/Illness Report
Claims Analyst	• Worker's Compensation Analyst	• Create/review/edit all parts of an employee injury/illness report • Create investigations and assign investigators • Submit Workers Comp Claims to third-party administrator (iVos/Sedgwick)

Creating a new Injury/Illness Report

To create an injury/illness report and/or claim on behalf of an employee

1. Log-in with your credentials at: https://app.riskandsafety.com/
2. Select **Report Employee Injury or Illness** from "Quick Links" on the right-hand menu of the RSS Platform homepage or from the top menu, select **Programs**, followed by **Employee Injury/Illness**, then select the round + button
3. Choose "No" if filling out the report on someone else's behalf and select **Continue**
    a. Search for the person who was injured
    b. If known, choose which location the person is associated with (i.e., Medical Center etc.)
    c. Choose if you are the person's Supervisor
    d. Select **Continue**

   Fill out the sections for Job information, Date & Time, Location, and Injury Details using **Back** and **Continue** to move between pages
4. All questions and sections indicated by a red asterisk are required by the reporter to proceed
    a. Once a blue action button is selected, the entered information is saved can and be returned to at any point in the reporting process for edits
5. After all incident report details have been entered, select **Submit** to complete the reporting process

a. A confirmation message is provided, which includes an active hyperlink to the report
b. For all new injury/illness report submissions, the employee's supervisor on record and the WC claim analyst(s) will receive a system generated email notification, if enabled for you location
c. Submitted reports and processed claims can be accessed through the Workers Compensation Program in the top menu of the RSS Platform homepage

Accessing Employee Injury/Illness Reports & Claims

When a report is submitted, the Claims Analyst receives notification that the report was created. To access the reports:

1. From the RSS homepage top menu, select **Programs**, then **Employee Injury/Illness**
   a. If a location has an associated organization/domain (i.e., Medical Center), the Workers Compensation Med Center program will be displayed
2. Filter the reports by selecting the column headers or using the search field and advanced search filters in the drop-down

Claim Statuses and their Meanings

Active Claim Status Types	
Not Started	Submitted employee injury/illness report not processed by WC claim analyst
In Progress	Saved claim information by WC Claim Analyst prior to "Submit to TPA" action
Queued for Export	Completed and verified claim by Claims Analyst submitted to TPA for electronic transmission and acknowledgement
Export in Progress	Claim has been locked for batch transmission
Exported	Claim has been electronically transmitted to TPA and awaiting acknowledgement status
Accepted	Claim acknowledgment by TPA, will import claim number
Rejected	Rejected claim status by TPA for errors; Claims Analyst is notified of status in EII Report Summary Table and provided rejection details for correction and resubmission.

Managing Employee Injury/Illness Reports & Claims

1. From the Employee Injury/Illness Reports page, select a report
   a. Navigate within the report by selecting the tabs along the top
   b. Use the round three-dot menu in the bottom right in each tab section for specific functions including editing.
   c. If information has been entered, employee and incident report details will auto populate in both the **Incident Details** and **Claim Details** tabs
   d. All questions and sections indicated with a red asterisk are required by the claim analyst to transmit a claim to the Third Party Analyst (TPA)

Injury/Illness Report Tabs

Incident Details Tab

The **Incident Details** tab allows claim analysts to review and edit report details and employee information.

Incident Details Tab Active Fields			
Field	**Field Type**	**Field Format**	**Required by TPA**
Employee			
Employee Name	Non-editable	Non-editable	Yes
Contact Information			
Home Address - Lines 1 & 2	Free text	General	X
Home Address - City	Free text	General	X
Home Address - State	Type search	Select	X
Personal Phone	Free text	###-###-####	X
Date and Time			
When did this happen? If you are uncertain estimate the date and time	Type/selection icon	MM/DD/YYYY HH:MM AM/PM	Yes
When did you first find out about the employee injury or illness?	Type/selection icon	MM/DD/YYYY HH:MM AM/PM	Yes

Incident Details Tab Active Fields			
Field	**Field Type**	**Field Format**	**Required by TPA**
On the day of the injury or illness, what time did this person begin work?	Type/selection icon	HH:MM AM/PM	X
Injury Details			
Describe in detail, how the injury/illness occurred, and the specific activity being performed at the time	Free text	General	Yes
Select any hazards that were involved	Check Box	Multi-select	Yes
If yes – Specify other hazards	Free text	General	X
Describe any equipment used	Free text	General	X
What area(s) of the body are injured or affected?	Dropdown	Multi-select	X
Describe the injured body area(s) in greater detail	Free text	General	X
People Involved			
Was there anyone else injured or ill?	Radio Button	Select	Yes
Were there any witnesses to the events that caused the injury or illness?	Radio Button	Select	X
If yes – Identify witnesses	Free text	General	
Confidentiality is being requested	Radio Button	Select	X
Supervisor			
Supervisor Name	Type search	Select	X
Job Information			
Department	Type search	Select	X
Employment Type	Dropdown	Select	X

Incident Details Tab Active Fields			
Field	**Field Type**	**Field Format**	**Required by TPA**
Work Phone	Free text	###-###-####	X
In general, how many hours a day does this person work? (hours/day)	Free text	General	X
In general, how many days a week does this person work? (days/week)	Free text	General	X
Location			
Where did the incident causing the injury or illness occur?	Free text	General	X
Building	Type search	Select	X
Full Building Address • *Physical address will auto populate if synched with building location data*	Free text	General	X
County • *County name will auto populate if synched with building location data*	Free text	General	X
Medical Treatment			
Did injured employee obtain medical treatment? *If no, additional information is not required*	Radio button	Select	Yes
If yes - Medical Treatment	Dropdown	Select	X
If yes – Medical treatment provider	Dropdown	Select	Yes
If yes – Who was the treating Physician	Free text	General	X
Documents Upload Files	Upload		X

Claim Details Tab

The **Claim Details** tab is where the claim analyst will enter all workers' compensation details needed for claim processing by TPA.

- Select the **Edit** button to enter claim information
- Once information has been added and verified select **Save**
- To queue the claim for electronic transmission to the TPA, select the round three-dot menu and select **Submit to TPA**. The claim status will change from "In Progress" to "Queued for Export"

Claim Details Tab Active Fields			
Field	**Field Type**	**Field Format**	**Required by TPA**
Claim			
Claim Status	Auto-populated	Current active claim status	N/A
Status Date	Auto-populated	Last status change date	N/A
Claim #	Auto-populated	TPA claim acknowledgement	N/A
Record Only	Radio button	Select	X
Injury/Illness Details			
Injury/Illness Details	Free text	General - 10K character limit	X
Details for IVOS	Free text	General - 255-character limit	Yes
Other Information	Free text	General - 10K character limit	X
Knowledge Dates			
Date of Employer Notified of Injury or Illness	Free text or selection icon	MM/DD/YYYY	Yes
WC Knowledge Date	Free text or selection icon	MM/DD/YYYY	X

Claim Details Tab Active Fields			
Field	**Field Type**	**Field Format**	**Required by TPA**
DWC 1 Provided Date	Free text or selection icon	MM/DD/YYYY	X
DWC 1 Provided Date	Free text or selection icon	MM/DD/YYYY	X
Income			
Gross Wage (USD)	Free text	Numeric	X
Gross Wage Period	Dropdown	Select	X
Other Income (USD)	Free text	Numeric (USD)	X
Other Income Period	Dropdown	Select	X
Salary Continuation	Radio button	Select	X
Full Pay on Last Day	Radio button	Select	X
Employee			
Employee ID	Type search	Numeric	Yes
Occupation Code/Description	Type search/Dropdown	Type/select	Yes
iVos Employment Type	Dropdown	Select	X
Type of Injury/Illness			
Body Parts	Dropdown	Multi-select	X
Nature or Injury	Dropdown	Select	X
OSHA	Dropdown	Select	X
Incident Type	Dropdown	Select	X
Claim Cause	Dropdown	Select	X
Reported Dates			

Claim Details Tab Active Fields			
Field	**Field Type**	**Field Format**	**Required by TPA**
Employer's First Report Date	Free text or selection icon	MM/DD/YYYY	X
Reported By	Dropdown	Select	Yes
Doctor's First Report Date	Free text or selection icon	MM/DD/YYYY	X
Initial Physician	Free text	General	X
Other Info			
Confidentiality Requested	Radio button	Select	X
Init w/ Medical Partner	Radio button	Select	X
Is the injured employee enrolled in the Slip-Resistant program?	Radio button	Select	X

Notes

- Provides a diary-type functionality for Claims Analysts
- Notes and attachments can be added
- Notes are only locally stored and will not be included in the file transfer

Work Statuses

- Allows for documentation of the following:
  - Release Date, Begin Date, End Date, Next Appointment Date, Work Status Type, Assigned by Physician, Comments
- Work Status content is only locally stored and will not be included in the file transfer

Claim Events

- Provides a history of changes in status to the claim and include a date/time stamp and the name of the user who made the update

Investigations (if applicable)

- Option: Investigations can be created as needed for individual injury/illness reports or can be auto created for each injury/illness report at the location.
  - Contact RSS to enable the auto-created investigations for your location
- Claims Analysts can edit the Investigators listed for the claim
- By default, the employee's Supervisor will be listed as an Investigator unless confidentiality was selected on the original report
- Investigations related to the claim are displayed in the table and include:
  - Report Date – date created
  - Report Status
  - Status Date – date when the current status changed to its present state
  - Incidents – number of issues identified in the investigation
  - Resolved Incidents – number of identified issues that have been resolved
- The Create button allows Claims Analysts to create new investigations
  - Injury/Illness reports can accommodate more than one investigation

Verifying Claim Status

A claim status can be verified from within the claim or from the Employee Injury/Illness Report summary table

- TPA file acceptance will import the Claim (#) number; if the file is rejected for errors, the Claim Status will display as Rejected and will be accessible for corrections and TPA resubmission
- The search bar feature on the Employee Injury/Illness Report page will allow users to filter claims by Employee Name, Date Range and Claim Status

Additional Functionality

User Groups

- Allows locations to create custom curated groups of departments and assign individuals with read only access to illness/injury reports for employees in those departments.
- Individuals in those groups are automatically added to investigations for the departments in the group
- Claims Analysts can access and maintain User Groups for their location with the following steps:
  1. From the RSS Platform homepage, select **Programs**, then **Employee Injury/Illness**
  2. Select the three-dot menu in the top right corner
  3. Select **User Group Management**

Claim Number

- By default, Claim Numbers are automatically added to claims that have been accepted by iVos/Sedgwick. However, Claims Analysts can manually add the Claim Number if needed.
- To enter a Claim Number Manually:
  1. Select the desired report, then choose the **Claims** tab
  2. Select the round three-dot menu in the lower right corner
  3. Select **Add Claim Number**
  4. Enter the Claim Number
  5. Select **Save**

Moving Claims Between Campus and Affiliated Medical Centers

- For locations with affiliated medical centers, it is sometimes necessary to transfer a claim between these domains.
- To move a claim to the affiliated campus or medical center:
  1. Select the desired report
  2. Select the round three-dot menu in the lower right corner
  3. Select **Transfer to Health System** or **Transfer to Main Campus**
  4. Review the confirmation message and select **Transfer**

Downloading Claims

- Claims can be downloaded to PDF
  1. Select the desired report
  2. Select the round three-dot menu in the lower right corner
  3. Select **Download**

Specialist Roles

- In addition to Claims Analyst, there are several other roles available:
  - Claims Analyst Read Only: provides read-only access to all claims for allocation
  - Bio Hazard Contact, Equipment Failure Contact, Chemical Hazard Contact and Radiation Hazard Contact: read-only roles that provide access to claims with a specific hazard identified
  - Injury Investigation Admin: provides full access to all investigations for a location
- For information on assigning these roles please see: RSS-Platform-Editing-Roles-Users guide

For RSS related questions, please contact our Risk and Safety Solutions (RSS) service desk at service@RiskandSafety.com