RISKMASTER Accelerator 17.1 User Guide

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Welcome To RISKMASTER

Welcome to RISKMASTER Accelerator

RISKMASTER is a powerful and flexible tool that maximizes your risk management operations. The software supports high-volume data entry, swift processing in multi-user environments, and provides a dynamic information interchange in network systems.

The tool has been developed and adapted after anticipating potential hazards and frail areas in industries' operation together with the behavior of numerous control variables.

RISKMASTER is a 100 % browser-based tool, leverages the latest Service Oriented Architecture based, contemporary client technology to cater to the divergent need of the industry.

This easy-to-use platform possesses all the high-class attributes and ability which are expected from a competent Internet application.

Using RISKMASTER, you can process, manage and analyze various claims data and risk impeccably with all your stakeholders anytime, anywhere across the world.

Introduction

The User Interface

The RISKMASTER user interface is designed to emulate the paper methods used in the risk management industry. RISKMASTER follows standard Internet navigation conventions.

Portal

is accessed from within a portal. You can use the portal tabs to switch between and other sites or applications in your portal.

Navigation Tree and Bread Crumbs

You can open multiple records in multiple windows simultaneously. Every time you open a window, it is added to the navigation tree and to the bread crumbs at the top of the window.

Use the navigation tree to move between windows and to work with, open and close windows.

Use the bread crumbs to move to parent records for the open record.

The Main Menu

The main menu gives you access to all RISKMASTER modules. Each item on the main menu gives you a drop down list that lets you open all the functions available in that **module**.

The table below lists the main menu items and the functions under each item. Select a function to open the help topic for that function.

Use this button	To open
Document	Events
	General Claims
	Workers' Compensation Claims
	Vehicle Accident Claims
	Property Claims
	Non-occupational Claims
Policy	<LOB> Policy
Diaries	Diary List
	Diary Calendar
User Documents	Documents List
	Word Merge Setup
Funds	Transactions
	Approve Transactions
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Physician

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Reports

+ Executive Summary

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Event

+ Std. Reports Queue

Available Reports

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Scheduled
Reports

			View Scheduled Reports
	Std. Reports Designers		
		SM Designer	
		SM Draft Reports	
		Post SM/World Reports	
		Post SM Draft Reports	
Search	Claim		
	Event		
	Employee		
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	Policy Management		
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	Disability Plan		
	Leave Plan		
Security	Security Mgt System		
	Change Database		
	Change Password		
	Business Entity Security		
	User Privileges Setup		
Utilities	Manager		
	Technician		
	Tools & Designers		
	UI Admin		
Help	Online Help		
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	Tutorials		

Business Analytics

Data Analytics

The RISKMASTER Toolbar

Use the RISKMASTER toolbar to perform actions on open records.

To see what each button does, move your mouse cursor over an image.

Add New Record	Go to Next Record	Copy Record	Enhanced Notes
Save Record	Go to Last Record.	Attach Document to Record	FROI
Search	Generate Executive Summary	Claim Comments	Jurisdictional Rules
Delete Record	Generate Record Summary	Void and Reissue Check	Look Up Records
Edit Record	Generate Quick Summary	Time and Expense	Mail Merge
Print Record	Create Diary	Send Email	OFAC
Go to First Record	Delete Diary	Clone Record	Payee Experience
Go to Previous Record	View Diary Record	Enter Comments	View Payment History
Print Check	Print Report	Load Claim	Create Diary
EOB	Submit to ISO	Complete	Go to Home
Edit	Route	Roll Diary	Peek
Void Diary	View Diary History	Approve	Reject
submit	Clear Data	Customize Reserves Tab Transactions	Save
Clone Image of Printed Check	Print Preview		

Field Level Buttons

Use the field level buttons to perform actions on data in fields within a window.

To see what each button does, move your mouse cursor over an image.

What's New in

Feature		RISKMASTER for Windows	RISKMASTER for Browser
	Browser-based	*Windows-based*	*Browser-based dependent on Windows install*
All RISKMASTER 7.0 Base Functionality	☑	☑	☑
E X C E P T I O N S Utilities Module	☑	☑	
Check Printing	☑	☑	
Quick Entry Module	Uses Power Views	☑	
Power Views	☑		☑
Non Occupational	☑	☑	☑
Long Term Disability	☑	☑	
FMLA	☑	☑	
In-line Supplemental Fields	☑		☑
Choice of tabs or scrolling windows	☑		☑
N E W F E Field Level Help	☑		
Portal	☑		
Memo RISKMASTER Editor	☑		
navigation tree	☑		
Single Sign On	☑		
Xtra Button	☑		

A	Enhanced Claim /Event Comments	☑		
T				
U	Mail Merge Form Letter Sorting	☑		
R	Organizational Hierarchy Cloning	☑		
E				
S	100% Server Deployment	☑		

Key Features

RISKMASTER Accelerator is a web enabled application that lets you:

- Share claims data and reports faster and at a lower cost through e-mail, browser, file and live feeds, whether you are a self-insured organization, third party adjuster, insurance pool, or an insurance company.

- Import and export data from and to external database sources and programs.

- Create supplemental data fields to hold extra information, your organization specifically needs.

- Attach multimedia documents to records. RISKMASTER also integrates with Microsoft Office programs.

- Record an event that precedes a claim or multiple claims. When you record claims, RISKMASTER uses the event information to complete some claim fields. This speeds up claim entry and maintains consistency in event information for all claims related to a single event. You can also track events and related claims by category.

- Work simultaneously on multiple claims.

- Generate actuarial, financial, statistical, and policy management reports, and export this data to third-party spreadsheets.

- Generate and e-mail reports in PDF to selected recipients.

- Monitor payments and collections, complaints, litigation and settlements, workers' compensation and OSHA compliance.

- Use a central calendar in diaries and e-mail to schedule and track meetings and appointments. You can also coordinate priorities and receive notification of critical events.

- Manage current and future legal costs.

- Create return-to-work programs.

Introduction

RISKMASTER is a powerful and flexible tool that maximizes your risk management operations. The software supports high-volume data entry, process in multi-user environments and provides a dynamic information interchange in network systems.

It is a newly redesigned, 100 % browser-based edition of RISKMASTER created using web services based on **Service Oriented Architecture** .

RISKMASTER combines the capabilities & features as well as the power, flexibility, and ease of use expected from an Internet application.

Using RISKMASTER, you can process, manage and analyze your various claims data and **risk** seamlessly with all your stakeholders anytime, anywhere around the world.

Getting Started

To Log In and Log Out

When you open RISKMASTER, you have to log into a data source , which is the link between RISKMASTER and your database. You must have a user name and password before you can use RISKMASTER. Your system administrator defines the data source on the workstation during installation.

While setting up RISKMASTER, your system administrator uses RISKMASTER's Security Management System to create your user account and specify the data sources you can use.

> Note: If you have questions about the data source or your user privileges, see your system administrator.

To Log In

1. Do one of the following:

    - In your browser address bar, enter the RISKMASTER URL. Your system administrator can give you this URL.

    - If you have an icon set up on your desktop, double click the RISKMASTER icon.

    The RISKMASTER Home window opens.

2. In the Login Name field, enter your user name.
3. In the Password field, enter your password.
4. Select Login.
    The RISKMASTER Database Login window opens.

5. From the Database drop down list, select a data source.
    RISKMASTER connects you to the data source you selected. You can select the menu items from the main menu, to open the required RISKMASTER window.

To Log Out

When you close your browser, RISKMASTER automatically logs you out. You can also log out without closing your browser. This is helpful if you need to log in as a different user.

- From the RISKMASTER Home window, select the Logout link at the upper right hand corner.

- RISKMASTER logs you out and the RISKMASTER Home window opens.

To Quit RISKMASTER

1. On any RISKMASTER window, select the Logout link in the upper right hand side corner.
    RISKMASTER logs you out and the RISKMASTER Home window opens.

2. Close your browser or navigate to a different web site.

To Work with Records

When you enter new information or modify previously saved information, RISKMASTER creates records in your database. For example

- Information you enter about each event becomes an event record,

- Information you enter about each claim becomes a claim record,

- Information you enter about each payment becomes a payment record, and so on.

To work with a record, you have to use a data-entry screen or window. For example, you can use the Event window to create an event record. The text, codes, and dates you enter in the Event window fields become part of that event record.

Note: You can only access records if you have the appropriate permission. Your system administrator sets up the security and permissions for your system. For questions about your permissions, see your system administrator.

To Create a Record

To create a record, open a window that has blank fields and then enter information into the fields.

1. From the RISKMASTER main menu, select the type of record you want to open. For example, From the Documents menu, select the Claims to open a claim related window.

   From the menu, select the type of record you want to create. For example, to create a new event select the Events.

2. The appropriate window opens. For example, from the main menu, if you selected Events, the Events window opens.

3. Complete the fields on the window.

   - To enter information into a code field, select the search button and from the Code Selection window that opens, select a code.

   - To enter information into a text field, type directly into the field.

Note: You must complete all the required fields before you can save the record. Field captions for all required fields are underlined. Completing the remaining fields is optional.

4. From the toolbar, select the Save button .

   RISKMASTER creates a new record and saves in your database.

To Delete a Record

You can delete records only if you have the appropriate permissions. Your system administrator is responsible for setting up your permissions. If you delete a record in error, contact your system administrator or RISKMASTER Customer Support for assistance.

Note: CSC recommends that you do not delete records. When you delete records, all records attached to the record are also deleted.

1. Open the record you want to delete.

2. From the toolbar, select the Delete button .

   A window opens and displays a warning message.

3. To delete the record, select OK.

   RISKMASTER deletes the record and all attached records.

To Search

You can search for events, claims, entities and any other records in the RISKMASTER database. You can search specifically for a record by record number, or you can search by attributes like last names, status (open/closed), and so on.

You can only search for records in the database from the data source you selected when you logged in.

1. From the main menu, select Search.

   The Search menu opens.

2. From the Search menu, select the record type (claims, entities, etc.) which you want to search for.

   The Search window for that record type opens.

Note: The fields on the Search window change based on the type of record you choose to search for.

3.   Enter information in as many fields as possible.

Note: If you do not know the complete information for a field, enter as much as you know plus an asterisk (*). For example, in the Last Name field, you can type P* to find all records with last names beginning with the letter P.

4.   In the Sort By section, select the fields by which you want to sort the results of your search.

5.   Select the Use Sound-Alike (Soundex) Match on Last Names Check box, if you are uncertain of the last name.

6.   Select the Default search view check box, if you want to set the current search view as the default search view.

7.   Select the Submit Query button.
      The search window opens displays the results of your search.

8.   Select the link for the record you want to open.
      The selected record opens in the appropriate window.

Tips

To Enter Memo Text

You can enter memo text in several RISKMASTER fields using the RISKMASTER Text Editor. To enter memo text,

1.   Search for the record in which you want to add the memo text.

2.   From the field, in which you can add a memo text, select the   button .
      The RISKMASTER Text Editor opens.

Note: If you have previously added memo text, the Existing Comment text displays.

3.   To add a new memo text, select the New button   .

4.   Enter your text in the blank field.

Note: Use the toolbar that follows Microsoft Word conventions to edit and format the text that you enter.

5.   From the toolbar, select the Save button   .
      The text that you enter displays in the field on the record window.

Flow of event and claim information

Notice received
email, fax, phone, letter, summons

Event — Event Follow-up

Persons
Involved

OSHA

Other Parameters
Fall Info, Medwatch,
Equipment, Sentinel

Dated
Text

General Claim	Worker's Compensation Claim	Vehicle Accident Claim
Persons Involved	Persons Involved	Persons Involved
Adjusters	Adjusters	Adjusters
Litigation	Litigation	Litigation
Defendants	Defendants	Defendants
Claimants	OSHA	Claimants
		Vehicles

Processing Events

To Get a Quick Summary

You can generate quick summaries and executive summaries In RISKMASTER. Use a quick summary to review details about events and claims on a single window. You can configure an executive summary to contain details about claims, financials, diaries, and notes. However, you cannot change the configuration of a quick summary.

To Get a Quick Summary

1. Search for the claim or event for which you want to generate a quick summary.

2. From the RISKMASTER toolbar, select the Quick Summary button [Q].
   The Quick Summary window opens.

3. From the left tab, select the item for which you want to view details.
   For example, under Event select Diaries to display the diaries associated with that event. The right frame displays the details.

To Recover a Forgotten Password

1. On the RISKMASTER Accelerator login window, select the Forget Password link.
   A message box displays,

2. Enter a valid user ID.

Note:A valid e-mail address should be specified in the Security Management System for the entered user ID.

A temporary password is sent to the e-mail address specified in Security Management System.

3. Login to RISKMASTER Accelerator using the temporary password.
   The New Password window opens.

4. In the Temporary Password field, enter the temporary password sent in the email.
5. In the New Email field, enter the new password you want to use to login to RISKMASTER.
6. In the Confirmed Password field, enter the password once again.
7. Select the button.

Work with Executive Summaries

Executive Summaries Overview

You can generate executive summaries in RISKMASTER that contain details about claim information, financial data, diaries, and notes. You can customize the executive summary to contain only the information you choose. An executive summary is useful when you want to create a snapshot of printable information, for example, you can configure an executive summary report to display specific information for claim analysis.

To Configure an Executive Summary

You can generate an executive summary that contains claim information, financial data, diaries, and notes. You can set up your executive summary to contain only the information you choose.

To configure an executive summary

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Exec. Summaries.
   The Exec. Summaries menu opens.

3. From the Exec. Summaries menu, choose Configurations.
   The Executive Summary Configuration window opens and a Configurations link displays under the Reports node in the left navigation tree.

4. On each tab, select the check boxes for the information that you want to include in your executive summary.

   Note: The more information you include, the longer the summary will take to run.

5. Select the Save Configuration button.

To configure an executive summary for users

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose UI Admin.
   The UI Admin menu opens.

3. From the UI Admin menu, choose Admin Exec Summaries Config.
   The Executive Summary Configuration window opens.

4. From the Available Users field, select the user that you want to configure to view the executive summary.
5. Select Add.
   The user(s) that you select displays in the Users to be Configured field.

6. To remove the user from the Users to be Configured field, select the ✗ button.

To View an Executive Summary

You can generate quick summaries and executive summaries in RISKMASTER. An executive summary can contain details about claim information, financial data, diaries, and notes. You can set up your executive summary to contain only the information you choose.

To Generate an Executive Summary

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Exec Summary.
   The Executive Summary menu opens.

3. Do one of the following:

   - From the Executive Summary menu, select Claim to open the Claim Search window.

   - From the Executive Summary menu, select Events to open the Event Search window.

4. On the Claim or Event Search window, enter search criteria in the fields to search for the claim or event you want to generate the executive summary for.
5. Select Submit Query.

The executive summary opens in Adobe Acrobat

To Get Help

To help you use RISKMASTER optimally, CSC offers you:

Online Help

This online help is designed to assist you in using RISKMASTER. The online help consists of three types of windows:

- **Conceptual information:** These topics have green headings and they help you understand the basics of RISKMASTER.

- **How to:** These topics have brown headings and they give you procedural instructions on how to use RISKMASTER.

- **Field help:** These topics have blue headings and they explain all the fields and buttons on each RISKMASTER window.

Printed Documentation

A printed user guide is available. The user guide is also available in PDF format. To Download the PDF:

1. From the main menu, select Help.
    The Help menu opens.

2. From the Help menu, choose User Manual (PDF)

You can download the latest version of the printed guide from http:// www.riskmaster.com/secure/ documentation.html.

You can either navigate through the PDF user guide using Acrobat Reader or print it.

Technical Support

Your RISKMASTER service contract explains the conditions for obtaining technical support.

To contact technical support, do one of the following:

- Go to http:// riskmaster.com/

- Call 877-275-3676.

Before you contact technical support have the following information available:

- Your RISKMASTER client number.

- Error message numbers for any errors you encountered and could not resolve.

- A list of the steps you performed just before a problem occurred.

To shorten the time you spend on a call, fax a description of your problem to 734-462-3151. This gives the technical support staff time to become familiar with your situation before you call.

Training

CSC offers you two types of training when you purchase RISKMASTER:

- **Prototype setup training:** System administrators learn how to set up RISKMASTER, including setting up code lists, check stock , permissions, and so on.

- **End user training:** You learn how to use RISKMASTER optimally.

Claims

Open Pending Claims List

1. From the main menu, select My Work.
2. From the My Work menu, select My Pending Claims.
3. The My Pending Claims window opens.
4. The pending claims for the logged in user are displayed
5. Select the Show All Claims checkbox, to view all the pending claims for the user
6. From the Show Pending From drop down list, select the user for which you want to see the pending claims
7. Note: Show Pending For dropdown shows all reportees to the Adjuster logged in,only those who are also an adjuster.
8. Select the Save button to save the preferences.
9. Select the [icon] button to restore the default settings.
10. Select the Export to Excel button to retrieve all the records in an excel sheet
11. Select the Save button to save your preferences

Financial Detail History

For Carrier Claims

1. From the Claim window, select the [icon] button.
   For Corporate Claims
2. From the reserves/ financials window, select the Financial Detail History button.
   The Financial Detail History window opens.

3. Select the Level field select the level for which you want to see the financials detail.

Date/Time	Displays the date and time of the transaction
Trans Type	Displays the transaction type
Policy Name	Displays the policy name of the policy associated with transaction
Unit	Displays the unit associated with the policy for the transaction
Coverage type	Displays the coverage type of the policy
Cause/ type of Loss	Displays the cause/type of loss os the policy associated with transaction
Financial type	Displays the financial type of the policy associated
Claimant	Displays the claimant associated with the transaction
Amount (USD)	Displays the amount of the transaction
Amount in Claim currency	Displays the amount in the selected claim currency

4. Select the Back button.

Processing Claims

Processing Claims

```
┌──────────────────────┐
│  Open the Claim window │
└──────────────────────┘
          │
          ▼
  ┌─────────────────┐
  │ Complete appro-  │
  │   priate tabs    │
  └─────────────────┘
                      ┌──────────────────┐
                   ──▶│ Add a Person     │
                      │ Involved         │
                      └──────────────────┘
                      ┌──────────────────┐
                   ──▶│ Defendant        │
                      │ Information      │
                      └──────────────────┘
  ┌─────────────────┐ ┌──────────────────┐
  │ Complete        │ │ Claimant         │
  │ another Claim   │ └──────────────────┘
  └─────────────────┘ ┌──────────────────┐
                   ──▶│ Adjuster         │
                      └──────────────────┘
                      ┌──────────────────┐
                   ──▶│ Litigation       │
                      └──────────────────┘
                      ┌──────────────────┐
                   ──▶│ Close the        │
                      │ claim            │
                      └──────────────────┘
```
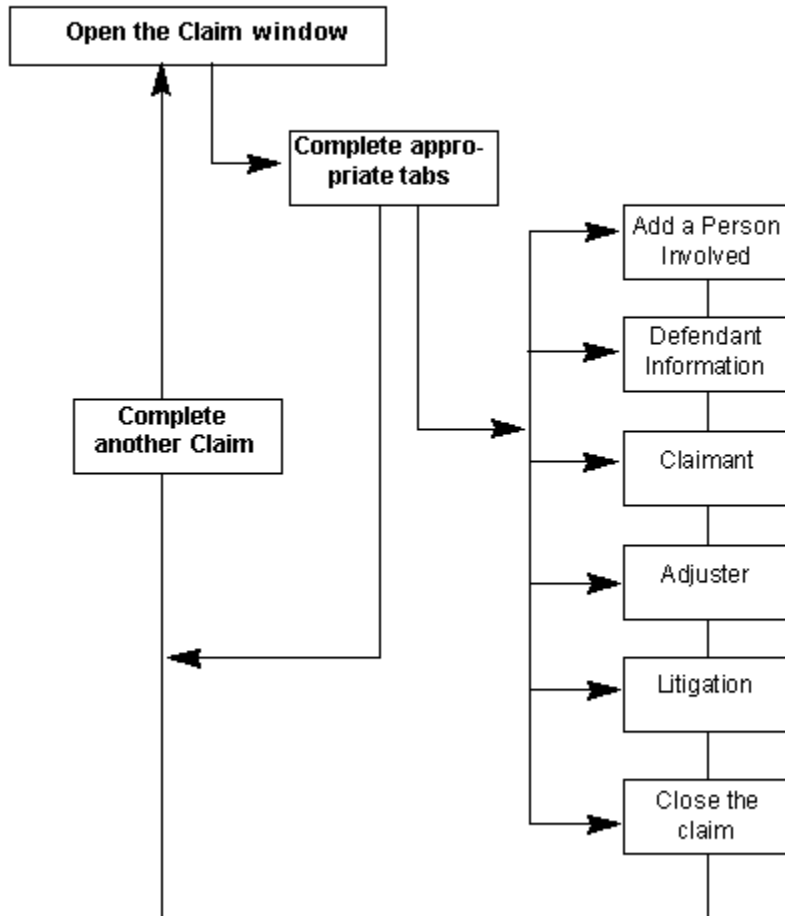
Events and Claims Overview

In RISKMASTER, you must associate every claim with an event . You can enter event information when an incident is reported and then add claims to the event when claimants file claims related to the event. You can also directly enter a claim. When you directly enter a claim, RISKMASTER creates an event for the claim using the information you enter into the claim.

CSC recommends that you enter event information before entering claim information.

You enter financial information in claim records but not in event records.

You can use the data contained in any of the claims to generate reports, such as the First Report of Injury or OSHA reports, or a wide variety of standard management reports.

Once you save a claim, you can attach documents, faxes, video, and audio files to the claim.

You can view the LOB, Claim Number and Claimant Name in the navigation tree when ever you save any claim or open any saved claim.

You can also merge and print standard letters and memoranda with data and attach this information to a claim.

General Claims

General Claims

This type of claim involves incidents resulting in bodily injury and/or property damage.

In you can create and process general liability claims. A general liability claim must be associated with an event.

To Enter a General Claim

1. From the main menu, select Document.

    The Document menu opens.

2. From the Document menu, choose General Claim.

    The General Claim window opens and a General Claim node displays in the navigation tree.

3. Select and complete the fields in the Claim Info tab , as shown below.

2.

Event Number	• If you open the General Claims window from the Event window, displays the event number.
	• If you open the General Claims window directly, RISKMASTER will create a new event and add the event number to this field when you save the claim.
Claim Number	Enter a unique identifying number for the claim or leave blank and RISKMASTER will generate a claim number when you save.
Policy LOB	Enter the code that best describes the insurance line of the policy against which the claim is made or select the button to select from the code selection window.
	The Policy LOB field is mandatory, only when **the Use Carrier Claims check box on the General System Parameter Setup: Carrier Claim Settings tab is selected.**
Claim Type	Enter the code that best describes the claim or select the button to select from the Code Selection window.

The Claim Types are filtered on the basis of the relationship set with Policy LOB on the Code Relationship window under Utilities> Managers.

The Claim Types are filtered on the basis of policy LOB only when on the General System Parameter Setup window: Carrier Claim Settings tab, 'Use Carrier Claims' check box is selected.

Department	Enter the department, the individuals or equipment involved in the event or select the button to select from the Org Hierarchy window.
Instr	Select the button to display special claim instructions for the department you entered.
Claim Status	Enter the code that best describes the claim status, select the button to select from the Code Selection window.
Date Closed	For a closed claim, displays when the claim was closed.
Close Method	When you close a claim, enter the code that best describes how the claim was closed or select the button to select from the Code Selection window.
Date of Event	Enter the date on which the event occurred or select the button to select from a calendar.
Time of Event	Enter the time when the event occurred.
	You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.
Date of Claim	Enter the date on which your organization learned of the claim or select the button to select from a calendar.
Time of Claim	Enter the time when your organization was informed of the claim.
Event Date Rptd.	Enter date on which the event was reported or select the button to select from a calendar.
Event Time Rptd	Enter the time when the event was reported.

Claim Date Rptd.	Enter the date when claim was reported or select the [calendar] button to select from a calendar.
Est. Collect	Enter the dollar amount that you expect to collect on this claim.
File Number	Enter any special identification number that your organization uses such as the box number or the insurance company's case number.
Policy Name	Enter a policy name that you want to attach to the claim or select the [...] button to select from the Policies window.

> RISKMASTER displays all policies that meet the criteria based on the claim's Department, Claim Type, Effective Dates, Policy Status, and Trigger Method. You can attach a policy to a claim only when it fulfills the five filters.

Open	Select to open the Policy Maintenance window for the policy attached to the claim.
Service Code	Enter the code that best describes who is responsible for processing the claim or select the search button to select from the Code Selection window.
Payments Frozen	Select the check box to stop all payments on this claim.

> The claim remains open but no payments are made until you clear this check box. You can only use this check box if you have the appropriate permissions.

Email ACORD To	Enter the e-mail address to which you want to send ACORD.
LSS Claim	t the check box if you want the claim to be sent to Legal Solution Suite (LSS).
Jurisdiction	Enter the state in which you must file OSHA reports for the claim or select the [search] button to select from the States window.
Currency Type	Enter the currency type or select the search button to select from the Code Selection window.

> By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Catastrophe Type	Select the button to select the required catastrophe type associated with the claim.

The catastrophe can be of various types

:h

quake

le Vehicle Accident

t

:l

ado

ers Compensation Accident

cane

dstorm

From the Catastrophe Type field when you select a type of catastrophe, the Catastrophes window opens and lists all the catastrophes present in database based on chosen type and that meet the criteria (Event Date must lie between Loss Start Date and Loss End Date) . Select 'Yes' and then choose a catastrophe record. The Catastrophe No. of the selected record displays in the Catastrophe Number field.

Catastrophe Number	Displays the number of the catastrophe record attached to the claim.
	Note: The number displays based on selection made in Catastrophe Type field.

3.
4.   Select and complete the fields in the Event Detail tab , as shown below.
4.

Location Address	Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.
County of Injury	Enter the county where the event occurred.
Location Description	Enter a description for the location where the event occurred or select the [icon] button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.
Authority Contacted	Enter the person who was informed of the event, or select the [icon] button to open the Standard Entity Search window and search for the authority contacted.
Event On Premise	Select the check box if the event occurred,

- on your organization's property (if you are self-insured).

- on the insured organization's property (if you are a TPA).

Primary Location	Enter the code that best describes the exact location where the event occurred or select the [🔍] button to select from the Code Selection window.
Location Type	Enter the code that best describes the location type where the event occurred or select the [🔍] button to select from the Code Selection window.
Cause Code	Enter the code that best describes the event cause or select the [🔍] button to select from the Codes Selection window.
Number of Injuries	Enter the number of persons injured as result of the event.
Number of Fatalities	Enter the number of deaths that resulted from the event.
Event Description	Enter a description for the event or select the [📝] button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.

5.
6.   Select and complete the fields on the ACORD tab , as shown below.

Remarks	Enter any remarks related to the claim or the ACORD form.
Amount of Total Loss	Enter the total amount of loss.
Reported To	Enter the name of the contact to whom the loss was reported.
Contact Insured	Enter the code that best describes the insurance status of the contact, or select the [🔍] button to select from the Code Selection window.
Type Of Premises	Enter the premises type on which the event took place.
Type of Product	Enter the product type.
Contact Res Phone	Enter the contact's residential phone number.
Premises/ Insured Is	Enter the code that best describes the type of premises or insured or select the [🔍] button to select from the Code Selection window.

Products/ Insured Is
Enter the code that best describes the type of products or insured or select the button to select from the Code Selection window.

Where Can Product Be Seen
Enter the address where you can see the damaged product.

Other Liability
Enter details of any other liability involved with the event.

Injured Employee Name/ Addr
Enter the injured employee's name and address.

Injured Employee Phone
Enter the injured employee's phone number.

Where to Contact
Enter the address where you can contact the injured employee.

When to Contact
Enter the time when you can contact the injured employee.

Describe Property Damaged
Enter a description of the damaged property.

Damaged Property Company Name
Enter the name of the company to which the damaged property belonged.

Damaged Property Policy Num
Enter the policy number for the damaged property.

Damaged Owner Name/Addr
Enter the name and address of the person who owns the damaged property.

Damaged Owner Res Phone
Enter the owner's residential phone number.

Damaged Owner Bus Phone
Enter the owner's business phone number.

Describe Damage
Enter a description for the damage.

Damage Estimate Amount
Enter the estimated amount for the damage.

Where Can Damage Be Seen
Enter the address of the location where you can see the damaged property.

Other Veh/Prop Ins	Enter the insurance status of the other vehicle or property or select the search button to select from the Codes Selection window.
Driver Same As Owner	Enter whether the vehicle driver and owner is the same or select the search button to select from the Codes Selection window.
Report Number	Enter the number of the event report.
Violations / Citations	Enter any violations/citations regarding the event.
Property Damaged Vehicle	Enter the damaged property or vehicle or select the [search] button to select from the Code Selection window.
ACORD Forms	Select the button to view the ACORD forms attached to the selected general claim.

7.   Select and complete the fields on the Loss Information tab, as shown below.

Special Handling Flag	Select the check box to flag the claim for special handling.
Self Insured Flag	Select the check box to indicate if the policy holder sets aside money to cover possible losses rather than purchasing an insurance policy.
AIA Codes	Enter the six-byte, alphanumeric Accident Injury Analysis codes or select the [search] button to select from the Code Selection window.
Report Number	Enter the reference number given to the official report by the Authority Contacted.
Date of Discovery	Manually enter the date on which the theft of property was first discovered missing. or select the [calendar] button to select from a calendar.
Claim Loss Type	Select the claim loss type.
Loss Description	Enter a description detailing the loss.
Notice Date	Enter the date on which the insured was given a notice of the claim
Error Date	Enter the date on which the error was made that caused the claimant to sustain a loss. Example: date on which insurer failed to renew customer's flood policy prior to hurricane season

Underlying Loss date	Enter the date of customer's loss event. An underlying loss date can be within retro & tail date ranges, not just within the normal effective and expiration dates of a policy.

8.   From the toolbar, select the Save button .

9.   To add adjuster information, from the navigation tree, select Adjuster under the General claim node and complete the Adjuster window.

10.   To enter litigation information, from the navigation tree, select Litigation under the General claim node and complete the Litigation window.

11.   To enter OSHA information, from the navigation tree, select OSHA under the General claim node and complete the OSHA Information window.

12.   To add claimant information, from the navigation tree, select Claimant under the General claim node and complete the Claimant window.

13.   To add defendant information, from the navigation tree, select Defendant under the General claim node and complete the Defendant window.

14.   To add financial information, from the navigation tree, select Financials under the General claim node and complete the Reserves window , as shown below .

Reserve	Displays the reserve categories your organization uses.
	To edit a reserve, select the reserve. This opens the Reserve for claim window.
Balance	Displays the reserve balance for each reserve category.
Paid	Displays the payments entered against the claim or claimant. When you enter a payment, you determine which reserve category to use by selecting a Transaction Type code.
Collections	Displays any income related to the claim for each reserve category. Also known as recoveries or subrogation .
Incurred	Displays the balance (plus payments less collections) for each reserve category.
Status	Displays whether the reserve category is open or closed.
Payment History	Select to open the Payment History for claim window .
Time and Expense	Select to open the Time and Expense window .
	You can only see this button if you activated the Time and Expense module in RISKMASTER Utilities .
Add Payment	Select to open the Funds Management window (Type: Payment) .
Add Collection	Select to open the Funds Management window (Type: Collection) .
Back to Claim	Select to open the claims window.
Currency Type	From the drop down list, select a currency type.

Select the button to open the Enhanced Notes for the associated parent claim record.

15.   If your organization defined Supplemental data, complete the Supplemental tab.

16.   From the toolbar, select the Save button.

> Note: Search for information in existing records, before you enter new data . This prevents duplicate entries in the database. You can select the Display Claimant Name in MDI check box on the General System Parameter Setup window: System Settings tab to view the Claimant Name along with LOB and Claim Number in the navigation tree.

Worker's Compensation Claims

Workers' Compensation Claims

Use the Workers' Compensation claims window to enter detailed information about the claims related to work injuries. You can add information related to exposures, coverages, persons Involved, work loss information in it.

To Enter a Workers' Compensation Claim

1.   From the main menu, select Document.

   The Document menu opens.

2.   From the Document menu, choose Workers' Comp.

   The Workers Compensation window opens and a Claims node displays in the navigation tree.

3.   Select and complete the fields on the Claim Info tab, as shown below.

   Event Number

   Enter the event number or select the   button to search from the Standard Entity Search window.

   - If you open the Worker's Compensation window from the Event window, displays the event number.

   - If you open the Worker's Compensation window directly, RISKMASTER will create a new event and add the event number to this field when you save the claim.

Claim Number   Enter a unique number for the claim. If you leave blank and RISKMASTER generates a claim number when you save.

Policy LOB   Enter the code that best describes the insurance line of the policy against which the claim is made or select the [Q] button to select from the code selection window.

> Note: The Policy LOB field is mandatory only when **the Use Carrier Claims check box on the General System Parameter Setup: Carrier Claim Settings tab is selected.**

Claim Type

Enter the claim type or select the [Q] button to select from the Code Selection window.

The Claim Types are filtered on the basis of the relationship set with Policy LOB on the Code Relationship window under Utilities> Managers.

The Claim Types are filtered on the basis of policy LOB only when on the General System Parameter Setup window: Carrier Claim Settings tab, 'Use Carrier Claims' check box is selected.

Employee No.   Enter the a unique number that an organization assigns to an individual employee or select the [...] button to open the Standard Entity Search window and select the employee associated with the claim.

When you select the Employee No. RISKMASTER automatically updates the Employee Info tab.

> Note: Search for the Employee No. before you enter a new Employee No. This prevents duplicate entries in the database.

Department   Enter the department, the individuals or equipment involved in the event belonged to or select the [Q] button to select from the Org Hierarchy window.

> Note: If the department you enter requires special instructions, instructions for that department will automatically open.

Instr   Select the button to display special claim instructions for the department you entered.

Claim Status

Enter the code that best describes the claim status, select the [Q] button to select from the Code Selection window .

Detail   Select the button to open the Claim Status History window.

Date Closed   Displays the date on which a claim was closed.

> Note: This field is active when the Claims Status is selected as Closed.

Close Method

Enter the code that best describes the claim closure method or select the [Q] button to select from the Code Selection window.

Current Adjuster   Displays the current adjuster name.

> Note: RISKMASTER automatically displays the name as filled in the Adjuster window.

Date of Event

Enter the date on which the event occurred or select the ⊞ button to select the date from the calendar.

Time of Event   Enter the time when the event occurred.

> Note: You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.

Date of Claim   Enter the date on which the insured or the carrier is given notice of the claim or select the ⊞ button to select the date from the calendar.

Time of Claim   Enter the time on which the insured or the carrier is given notice of the claim.

Date Reported

Enter date on which the event was reported or select the ⊞ button to select the date from the calendar.

Event Date Rptd

Enter the date when your organization learned of the event or select the ⊞ button to select from the calendar.

Event Time Rptd   Enter the time when your organization learned of the event.

Claim Date Rptd.

Enter the date when the claim was reported or select the ⊞ button to select from the calendar.

File Number   Enter any special identification number that your organization uses such as the box number or the insurance company's case number.

Policy Name

Enter a policy name that you want to attach to the claim or select the ••• button to select from the Policies window.

> Note: RISKMASTER displays all policies that meet the criteria based on the claim's Department, Claim Type, Effective Dates, Policy Status, and Trigger Method. You can attach a policy to a claim only when it fulfills the five filters.

Open   Select to open the Policy Maintenance window for the policy attached to the claim.

Policy MCO   Enter the Managed Care Organization (MCO) responsible for policy administration or select the ••• button to search from the Standard Entity Search window.

Service Code   Enter the code that best describes who is responsible for processing the claim or select

the [🔍] button to select from the Code Selection window.

LSS Claim   Select the check box if you want the claim to be sent to Legal Solution Suite (LSS).

Payments Frozen   Select the check box if you want to prevent any payments to be made against the claim.

> Note: The claim remains open but no payments are made until you clear this check box. You can only use this check box if you have the appropriate permissions.

Jurisdiction

Enter the state in which you must file OSHA reports for the claim or select the [🔍] button to select from the Codes Selection window.

Currency Type

Enter the currency type or select the search button [🔍] to select from the Code Selection window.

> Note: By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Catastrophe Type   Select the button to select the required catastrophe type associated with the claim.

> Note : The catastrophe can be of various types
>
> • Death
>
> •Ice
>
> •Earthquake
>
> •Multiple Vehicle Accident
>
> •Fire
>
> • Theft
>
> •Flood
>
> • Tornado
>
> •Hail
>
> •Workers Compensation Accident
>
> •Hurricane
>
> • Windstorm
>
> Note: From the Catastrophe Type field when you select a type of catastrophe, the Catastrophes window opens and lists all the catastrophes present in database based on chosen type and that meet the criteria (Event Date must lie between Loss Start Date and Loss End Date). Select 'Yes' and then choose a catastrophe record. The Catastrophe No. of the selected record displays in the Catastrophe Number field.

Catastrophe Number	Displays the number of the catastrophe record attached to the claim.	
	Note: The number displays based on selection made in Catastrophe Type field.	

4. Select and complete the fields on the Event Detail tab, as shown below.

Location Description	Select the ![icon] button to open the RISKMASTER Editor and enter a description of where the event occurred.
Event On Premise	Select the check box if the event occurred,

- on your organization's property (if you are self-insured).

- on the insured organization's property (if you are a TPA).

Location Address	Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.
County of Injury	Enter the county where the event occurred.
Primary Location	Enter the code that best describes the exact location where the event occurred or select the ![icon] button to select from the Code Selection window.
Location Type	Enter the code that best describes the location type where the event occurred or select the ![icon] button to select from the Code Selection window.
Cause Code	Enter the code that best describes what caused the event, or select the ![icon] button to select from the Codes Selection window.
Number of Injuries	Enter the number of persons injured as result of the event.
Number of Fatalities	Enter the number of deaths that resulted from the event.
Event Description	Select the ![icon] button to open the RISKMASTER Editor and enter additional event information that is used in FROI.
Injury From and To	If the injury occurred over a period of time, enter the beginning and end dates for the period over which the injury occurred or select the button to select from a calendar.
Time Workday Began	Enter the time when the employee started working every day.
OSHA Recordable	Select the check box if the claim is OSHA recordable.
Lost Consciousness	Select the check box if the employee lost consciousness because of injury.

<table>
<tr><td>OSHA Accident Description</td><td>Select the button to open the RISKMASTER Editor. Enter the OSHA accident description and then select OK.</td></tr>
<tr><td>Regular Job at Time of Event</td><td>Select the check box if the employee was working on a task associated with the employee's regular job, when injured.</td></tr>
</table>

6.   Select and complete the fields on the Employee Info tab, as shown below.

Last Name	Displays the employee's last name based on the Employee No. you enter on the Claim Info tab.
First Name	Displays the employee's first name.
Middle Name	Displays the employee's middle name.
Initials	Displays the initials of the employee's name.
Also Known as	Enter employee's nick name, or any other name that the employee was known by.
Address	Enter the employee's address. Enter the City, State, Zip, County, and Country in the appropriate fields.
Soc. Sec. No.	Enter employee's social security number.
Date of Birth	Enter employee's date of birth or select from the calendar.
Age	Based on the date of birth you entered, RISKMASTER displays the employee's age at the time of the event.
Office Phone	Enter the employee's office phone number.
Home Phone	Enter the employee's home phone number.
Fax	Enter the employee's fax number.
Sex	Enter the code for the employee's gender or select the [button] button to select from the Code Selection window.
Title	Enter the employee's official title, if any.
Cost Center	Enter the employee's assigned accounting cost center or select the [button] button to select from a Codes Selection window.
Attorney	Enter the employee's attorney or select the [button] button to open the Standard Entity Search window and select the attorney.

Employee Claim History	Select to open the Claim Involvement History window and view the previous claims associated with the employee.	
MMSEA Data	Select the button to open MMSEA Date window.	
Dependents	Select to open the Employee Involved Dependent window.	

7. Select and complete the fields on the Employment Info tab, as shown below.

Date Hired	Enter the date of hiring of the employee or select the button to select from a calendar.
Termination Date	If the employee no longer works for your organization, enter the last day that the employee worked or select from a calendar.
Position Code	Enter the code that best describes the employees job or select the button to select from the Code Selection window.
Department	Enter the code for the department the employee worked for or select the button to select from the Org Hierarchy window.
Supervisor	Select the button to search for the employee's supervisor, or enter the supervisor's name if the supervisor is not already in the database.
Pay Type	Enter the code that indicates whether an employee is salaried or is paid hourly or select the button to select from the Code Selection window.
Monthly Rate	RISKMASTER calculates the employee's monthly rate based on the weekly rate.
Work Week	Select the check boxes for all the days of the week that the employee works.
Pay Amount	If the employee is salaried, enter the employee's salary.
Hourly Rate	If the employee is paid hourly, enter the employee's hourly pay.
Hours Per Week	Enter the employee's regularly scheduled number of work hours per week.
Weekly Rate	RISKMASTER calculates the employee's weekly rate based on the hourly rate and the hours per week. You can enter a different hourly rate if you choose.
Compensation Rate	Displays the amount to be paid as compensation.

Date of Death	If the employee died as a result of the injury, enter the date of death or select the button to select from a calendar.
Marital Status	Enter the code that best describes the employees marital status or select the button to select from a Codes Selection window.
Work Permit Date	Enter the date the work permit was issued or select the button to select from a calendar.
Work Permit #	Enter employee's work permit number.
NCCI Class	Enter the code for the job class as determined by the National Council of Compensation Insurers or select the button to select from the Code Selection window.
Job Classification	Enter the job classification code or select the button to select from a Codes Selection window.
Active	Select the check box if the employee is currently employed by your organization.
Full Time Employee	Select the check box if the employee works at least 40 hours per week.
Exempt	Select the check box if the employee is a salaried employee.
Hired in Jurisdiction	Select the check box if the employee was hired in the same OSHA jurisdiction as the one you selected on the Claim Info tab.
Disability Option	Enter the code that best describes the disability option available to the employee or select the button to select from the Code Selection window.
AWW Rate Calculations	Select the button to open the Work Comp Average Weekly Wage window.
	Note: This window is only available for a few jurisdictional states.
Indemnity Rate Calculations	Select the button to open the Benefit Calculator window.
Leave Mgt	Select the button to open the Leave Management window.

8.   Select and complete the fields on the Medical Info tab, as shown below.

Hospital

Select the ··· button to open the Standard Entity Search window to search for and select the hospital where the employee was treated.

> Note: **To** remove an existing hospital from the Hospital field, select the record and select ➡ .

Hospital Date Range

Enter the date range for which the employee was hospitalized or select the 📅 button to select the date from the calender.

Disability Type

Enter the code for the employee's disability type or select the 🔍 button to select from the Code Selection window.

Illness Type

Enter the code for the employee's illness type or select the 🔍 button to select from the Code Selection window.

> Note: The field is active only when you select the Disability Type as Illness.

Injuries

Enter the code that best describes the injuries the employee sustained or select the 🔍 button to select from the Code Selection window.

> Note: The field is active only when you select the Disability Type as Injury.

(ICD9) Primary Diagnosis

Select the ··· button to open the [Primary Diagnosis window](#) and select the IDC 9 codes.

(ICD10) Primary Diagnosis

Select the ··· button to open the [Primary Diagnosis window](#) and select the ICD 10 codes.

Physicians

Select the ··· button to open the Standard Entity Search window and select the physician who made the primary diagnosis.

MDA Topic

Select the 📝 button to open the RISKMASTER Editor and enter the Medical Disability Advisor topic.

Disability Guideline

Select to open the disability guideline.

MDA Factor

Displays the Medical Disability Advisor factor based on the MDA topic you select.

Treatment

Enter the code that best describes the treatment for the injury or illness or select the 🔍 button to select from the Code Selection window.

Other Treatment	Enter any other treatment other than those described by the codes or select the button to open the RISKMASTER Editor.
Diagnosis	Enter the code that best describes the diagnosis or select the button to select from the Code Selection window.
Body Parts	Enter the code that best describes the limbs, bones, or organs involved in the injury or select the button to select from the Code Selection window.
Medical Conditions	Enter the code that best describes any existing medical conditions or select the button to select from the Code Selection window.
Other Medical Conditions	Select the button to open the RISKMASTER Editor and enter any other medical conditions.
Major Hand	Enter whether the Right or the Left hand is the major hand or select the button to select from the Code Selection window.
MMI Date	Enter the date on which the injured/ ill employee reached Maximum Medical Improvement (MMI).
Case Managers	Select the button to open the Case Manager History window.
Treatment Plan	Select the button to open the Treatment Plan/Medical Chronology window.
Medical Mgt Savings	Select the button to open the Medical Management Savings List window.

9. Select and complete the fields on the Case Mgt/RTW tab, as shown below.

Primary Case Manager Summary

Case Manager	Displays the primary case manager for this case. You select the primary case manager on the Case Manager History window.
Case Status	Displays the code for the case status. You enter this information on the Case Manager History window.
Referral Date	Displays the date on which the referral was issued. You enter this date on the Case Manager History window.
Days with Case Mgr	Displays the number of days the case was with the case manager, based on the Date Closed.

RTW Management

RTW Status	Enter the code that best describes the return to work status for the claimant or select the button to select from the Code Selection window.
Restricted Work	
Current Restricted Days?	• This check box is selected if you have not entered an actual last restricted day on the Restricted Days window. • This check box is not selected if you entered an actual last day on the Restricted Days window.
Est. Release from Rst.	Enter the estimated date on which the claimant will be released from work restrictions. Note: The minimum, optimum and maximum restricted work durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower section of the window.
Actual Last Rst Day	Displays the last day you entered on the Restricted Days window, if you set the RTW Status as Released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the First Day Restricted you entered on the Restricted Days window, the Estimated Release from Restriction. date and the work week.
Total Restricted Days	Displays the total number of restricted days based on the First Day Restricted and the Last Day Restricted you entered on the Restricted Days window. If there is no Last Day Restricted, then the total number of restricted days is based on today's date. The previous durations on the Restricted Days window are also considered in this calculation.
MDA Duration - Days/Date	• **Job Classification**: displays the job classification you selected on the Employment Info tab. • **Minimum**: displays the minimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected. • **Optimum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected. • **Maximum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected
Work Loss	
Current Work Loss?	• This check box is selected if you have not entered a Return To Work day on the Lost Days window. • This check box is not selected if you entered a Return To Work day on the Lost Days window.

Est. RTW Date	Enter the estimated date on which the claimant can return to work.
	Note: The minimum, optimum and maximum work loss durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower half of this section.
Actual RTW Date	Displays the return to work date you entered on the Lost Days window, if you set the RTW Status as released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the Last Work Day you entered on the Lost Days window, the Estimated Return to Work date and the work week.
Total Lost Days	Displays the total number of lost days based on the Last Work Day and the Return to Work date you entered on the Lost Days window. If there is no Return to Work date, then the total number of lost days is based on today's date. The previous durations on the Lost Days window are also considered in this calculation.
MDA Durations-Days/Date	• **Job Classification**: displays the job classification you selected on the Employment Info tab.
	• **Minimum**: displays the minimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	• **Optimum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	• **Maximum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected
Case Managers	Select to open the Case Manager History window.
Restrictions	Select to open the Restricted Days window.
Work Loss	Select to open the Lost Days window.
Accommodation	Select to open the Accommodation window.
Vocational Rehabilitation	Select to open the Vocational Rehabilitation window.
Medical Disability Guidelines	Select to open the Medical Disability Advisor.

11.   Select and complete the fields on the Jurisdictionals tab, as shown below.

Data entry fields   RISKMASTER uses the information you enter into these fields along with other information you entered into RISKMASTER to populate the First Report forms.

EDI History button   Select the button to open the EDI History window and view EDI extraction history for a claim.

FROI	Select the button to open the Preparer Information window and enter preparer information for the FROIs. After you enter preparer information you can view the First Report forms available for the state you selected.

For example:

- California: Employer's Report of Occupational Injury or Illness

- Michigan: Employer's Basic Report of Injury

- Alabama: Employer's First Report of Injury or Occupational Disease, and so on.

Select a form to open the form in Adobe Acrobat.

WC PDF Forms	Select to open the WC PDF Forms window and display the claim forms available for this claim.

13.   From the toolbar, select the Save button .

14.   To add adjuster information, from the navigation tree, select Adjuster under the Workers Compensation Claim node and complete the Adjuster window.

15.   To enter litigation information, from the navigation tree, select Litigation under the Workers Compensation Claim node and complete the Litigation window.

16.   To enter OSHA information, from the navigation tree, select OSHA under the Workers Compensation Claim and complete the OSHA Information window.

17.   To add defendant information, from the navigation tree, select Defendant under the Workers Compensation Claim and complete the Defendant window.

18.   To add persons involved, from the navigation tree, select Persons Involved under the General claim node and complete the Persons Involved window.

19.   To set reserves or to add financial information, select the Financials button and complete the Reserves window, as shown below.

Reserve	Displays the reserve categories your organization uses.
	Note: To edit a reserve, select the reserve. This opens the Reserve for claim window.
Balance	Displays the reserve balance for each reserve category.
Paid	Displays the payments entered against the claim or claimant. When you enter a payment, you determine which reserve category to use by selecting a Transaction Type code.
Collections	Displays any income related to the claim for each reserve category. Also known as recoveries or subrogation.
Incurred	Displays the balance (plus payments less collections) for each reserve category.
Status	Displays whether the reserve category is open or closed.
Payment History	Select to open the Payment History for claim window.
Time and Expense	Select to open the Time and Expense window.

> Note: You can only see this button if you activated the Time and Expense module in RISKMASTER Utilities.

Add Payment   Select to open the Funds Management window (Type: Payment).

Schedule Checks   Select to open the Schedule Automatic Check Processing window.

Add Collection   Select to open the Funds Management window (Type: Collection).

Back to Claim   Select to return to the claims window.

Currency Type   From the drop down list, select a currency type.

20.   If your organization defined Supplemental data, complete the Supplemental tab.

21.   From the toolbar, select the Save button .

> Note: Search for information in existing records, before you enter new data . This prevents duplicate entries in the database. You can select the Display Claimant Name in MDI check box on the General System Parameter Setup window: System Settings tab to view the Claimant Name along with LOB and Claim Number in the navigation tree.

To Calculate Average Weekly Wage

1.   Search for the Workers' Compensation claim you want.
The appropriate claim opens.

2.   Select the Employment Info tab.

3.   From the Employment Info tab, select the AWW Rates Calculations button.
The Work Comp Average Weekly Wage window opens.

Note: The button is only available for certain jurisdictions.

4. In the Last Work Week field, enter the last day that the employee worked. Based on the date, RISKMASTER sets the weekly pay periods in the Select Week drop down list.

5. In the Wrk Days/Wk field, enter the number of 8 hour days the employee works in a week.

6. In the Daily Earn field, enter the dollar amount the employee earns in one day.

   RISKMASTER calculates the amount the employee earns in one week an d enters it in the Constant Wage field.

7. Do one of the following:

   - Select the Set All button to use the constant wage amount for all weeks included in the calculation.

   - Enter the amount the employee earned for each week individually in the fields for each week.

Note: The number of weeks included in the calculation depends on the jurisdiction you select on the Claim Info tab.

8. In the All Bonuses field, enter a total of all the bonuses the employee received during the weeks included in the calculation.

9. Select the Include Zero Amts in Calc option to include zero-amount pay periods in the average weekly wage calculation.

10. Select the Calculate button.

    RISKMASTER enters the average weekly wage into the AWW field.

11. Select Return AWW.

    RISKMASTER enters the average weekly wage into the Weekly Rate field on the Employment Info window.

12. From the toolbar, select the Save button .

To View or Print First Report of Injury forms

Before you can print jurisdictional forms on a Workers' Compensation claim your system administrator must activate the appropriate forms. Different forms are available for different states and provinces.

To view or print jurisdictional forms

1. Search for the workers' compensation claim you want.

   The Workers' Compensation window opens.

2. Select the Jurisdictionals tab.

3. Complete the fields on the Jurisdictionals tab , as shown below .

View FROI	Select to open the Preparer Information window.
	On the Preparer Information window, enter the preparer information and select Attach form to Claim to attach the First Report form to the claim record.
View form	Select to open the completed First Report form in Adobe Acrobat Reader. You can then enter additional information into the form and print the form.
Data tab	These fields will vary depending on the state of jurisdiction you selected in the Claim Info tab.
	RISKMASTER uses the information you enter into these fields along with other information you entered into RISKMASTER to populate First Report forms.

4. From the toolbar, select the Save button .

5. Select the View FROI button.

   The Preparer Information window opens.

6. Enter the preparer information into the fields.

7. Select the Attach Form to Claim check box to save the form as an attachment for the claim.

8. Select the View Form button.

 Adobe Acrobat opens, with the completed First Report of Injury form. RISKMASTER uses the information you entered into the fields on the Jurisdictional window along with other information you entered into RISKMASTER to populate First Report of Injury form.

9. Review the First Report of Injury form.

10. To print the form, from the Adobe Acrobat main menu, choose File > Print.

Tips

To Work with Employee Information

To view employee claim history

1. From the Employee Info tab, select the Employee Claim History button.

 The Claim Involvement History page opens and lists all associated claims.

2. To open a previously associated link, select the claim number link.
3. To go back to the Employee Info tab, close the Claim Involvement History window.
4. To print the Claim Involvement History, select the Print button.

To enter dependents

You can enter the details of the dependents for the employee.

1. Search for the workers' compensation claim you want.

 The appropriate claim opens.

2. Select the Employee Info tab.
3. From the Employee Info tab, select the Dependents button.

 The Employee Involved Dependent window opens.

4. Complete the fields on the Employee Involved Dependent window , as shown below .

Dependant's Last Name	Enter the dependent's last name.
First Name	Enter the dependent's first name.
Middle Name	Enter the dependent's middle name.
Address	Enter the dependent's address. Enter the City, State, Zip, and Country in the appropriate fields.
Relation to Employee	Enter the code that best describes the relationship of the dependent with the employee or select the search button to open the Code Selection window.
Included in Employee's health plan	Select the check box if the dependent is covered in the employee's health plan.
Soc. Sec No.	Enter the dependent's Social Security Number (SSN).
Date of Birth	Enter the employee's date of birth.

Age	Enter the employee's current age.
Sex	Enter the employee's gender.

5.   From the toolbar, select the Save button [image].

Workers' Compensation: Employee Info Tab

Use the Employee Info tab to enter detailed information about the employee. If you enter Employee No. in the Claim Info tab, RISKMASTER automatically updates the Employee Info tab.

> Note: CSC recommends that you select the Employee No. on the Claim Info tab and use this tab only to make changes to the employee record. This prevents duplicate entries in the database.

To open   From the Workers' Compensation window, select the Employee Info tab.

Field definitions

Last Name	Displays the employee's last name based on the Employee No. you enter on the Claim Info tab.
First Name	Displays the employee's first name.
Middle Name	Displays the employee's middle name.
Also Known as	Enter employee's nick name, or any other name that the employee was known by.
Address	Enter the employee's address. Enter the City, State, Zip, County, and Country in the appropriate fields.
Soc. Sec. No.	Enter employee's social security number .
Date of Birth	Enter employee's date of birth or select the [image] button to enter date from the calendar.
Age	Based on the date of birth you entered, RISKMASTER displays the employee's age at the time of the event .
Office Phone	Enter the employee's office phone number.
Home Phone	Enter the employee's home phone number.
Fax	Enter the employee's fax number.
Sex	Enter the code for the employee's gender or select the [image] button to select from the Code Selection window.
Title	Enter the employee's official title, if any.

Cost Center	Enter the employee's assigned accounting cost center or select the [magnifying glass] button to select from a Codes Selection window.
Attorney	Enter the employee's attorney or select the [...] button to open the Standard Entity Search window and select the attorney.
Status	Select the Open or Closed status for the claimant/ entity.
Employee Claim History	Select to open the Claim Involvement History window and view the previous claims associated with the employee.
Dependents	Select to open the Employee Involved Dependent window.

Workers' Compensation: Jurisdictionals Tab

Use the Jurisdictionals tab to enter information that you want RISKMASTER to enter into FROI forms for the jurisdictional state you selected.

> Note: From this tab, you can open the completed First Report of Injury forms in Adobe Acrobat Reader. You can then enter additional information into the forms and print the forms.

To open   From the Workers' Compensation window, select the Jurisdictionals tab.

Field definitions

Data entry fields	RISKMASTER uses the information you enter into these fields along with other information you entered into RISKMASTER to populate the First Report forms.
EDI History	Select the button to open the EDI History window and view EDI extraction history for a claim.
FROI	Select the button to display the Preparer Information window and enter preparer information for the FROIs. After you enter preparer information you can view the First Report forms available for the state you selected.

For example:

- California: Employer's Report of Occupational Injury or Illness
- Michigan: Employer's Basic Report of Injury
- Alabama: Employer's First Report of Injury or Occupational Disease, and so on.

Select a form to open the form in Adobe Acrobat.

WC PDF Forms	Select to open the WC PDF Forms window and display the claim forms available for this claim.

Employee Involved Dependent Window

To open   From the Employee Info tab, select the Dependents button.

Workers' Compensation: Case Mgt/RTW Tab

Use the Case Mgt/RTW tab to review and enter detailed information about the medical case and to calculate work loss days and restricted days. You can use this tab to calculate the return to work date for the claimant based on the job class, ICD-9 code, MDA topic and MDA factor you enter.

To open	From the Workers' Compensation window or Non-Occupational Claims window , select the Case Mgt/RTW tab.

Field definitions

Primary Case Manager Summary

Case Manager	Displays the primary case manager for this case. You select the primary case manager on the Case Manager History window.
Case Status	Displays the code for the case status. You enter this information on the Case Manager History window.
Referral Date	Displays the date on which the referral was issued. You enter this date on the Case Manager History window.
Days with Case Mgr	Displays the number of days the case was with the case manager, based on the Date Closed.

RTW Management

RTW Status	Enter the code that best describes the return to work status for the claimant or select the [magnifying glass] button to select from the Code Selection window.

Restricted Work

Current Restricted Days?	▪ This check box is selected if you have not entered an actual last restricted day on the Restricted Days window. ▪ This check box is not selected if you entered an actual last day on the Restricted Days window.
Est. Release from Rst.	Enter the estimated date on which the claimant will be released from work restrictions. Note: The minimum, optimum and maximum restricted work durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower section of the window.
Actual Last Rst Day	Displays the last day you entered on the Restricted Days window, if you set the RTW Status as Released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the First Day Restricted you entered on the Restricted Days window, the Estimated Release from Restriction. date and the work week.

Total Restricted Days	Displays the total number of restricted days based on the First Day Restricted and the Last Day Restricted you entered on the Restricted Days window.
	If there is no Last Day Restricted, then the total number of restricted days is based on today's date. The previous durations on the Restricted Days window are also considered in this calculation.

MDA Duration - Days/Date	▪ **Job Classification**: displays the job classification you selected on the Employment Info tab.
	▪ **Minimum**: displays the minimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	▪ **Optimum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	▪ **Maximum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.

Work Loss

Current Work Loss?	▪ This check box is selected if you have not entered a Return To Work day on the Lost Days window.
	▪ This check box is not selected if you entered a Return To Work day on the Lost Days window.

Est. RTW Date	Enter the estimated date on which the claimant can return to work.
	Note: The minimum, optimum and maximum work loss durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower half of this section.

Actual RTW Date	Displays the return to work date you entered on the Lost Days window, if you set the RTW Status as released.

Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the Last Work Day you entered on the Lost Days window, the Estimated Return to Work date and the work week.

Total Lost Days	Displays the total number of lost days based on the Last Work Day and the Return to Work date you entered on the Lost Days window. If there is no Return to Work date, then the total number of lost days is based on today's date. The previous durations on the Lost Days window are also considered in this calculation.

MDA Durations- Days/Date	▪ **Job Classification**: displays the job classification you selected on the Employment Info tab.
	▪ **Minimum**: displays the minimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	▪ **Optimum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.

- **Maximum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.

Case Managers	Select to open the Case Manager History window.
Restrictions	Select to open the Restricted Days window.
Work Loss	Select to open the Lost Days window.
Accommodation	Select to open the Accommodation window.
Vocational Rehabilitation	Select to open the Vocational Rehabilitation window.
Medical Disability Guidelines	Select to open the Medical Disability Advisor.

Claim Involvement History Window

To open   From the Employee Info tab, select the Employee Claim History button.

Field definitions

Table	Displays the details of the claim already associated with the employee.
Cancel	Select to close the Claim Involved History window.
Print	Select to print the claim involved history of the employee.
Claim Number	Select the link to open the associated claim.

Workers' Compensation: Employment Info Tab

Use the Employment Info tab to enter detailed information about the employee's job. If you entered the Employee No. on the Claim Info tab, RISKMASTER automatically updates the Employment Info tab.

> Note: CSC recommends that you select the Employee No. on the Claim Info tab and use this tab only to make changes to the employee record. This prevents duplicate entries in the database.

To open   From the Workers' Compensation window, select the Employment Info tab.

Field definitions

Date Hired	Enter the date of hiring of the employee or select the date from a calendar.
Termination Date	If the employee no longer works for your organization, enter the last day that the employee worked or select from a calendar.
Position Code	Enter the code that best describes the employees job or select the [button] button to select from the Code Selection window.
Department	Enter the code for the department the employee worked for or select the [button] button to select from the Org Hierarchy window.
Supervisor	Select the [button] button to search for the employee's supervisor, or enter the supervisor's name if the supervisor is not already in the database.
Pay Type	Enter the code that indicates whether an employee is salaried or is paid hourly or select the [button] button to select from the Code Selection window.
Monthly Rate	RISKMASTER calculates the employee's monthly rate based on the weekly rate.
Work Week	Select the check boxes for all the days of the week that the employee works.
Pay Amount	If the employee is salaried, enter the employee's salary.
Hourly Rate	If the employee is paid hourly, enter the employee's hourly pay.
Hours Per Week	Enter the employee's regularly scheduled number of work hours per week.
Weekly Rate	RISKMASTER calculates the employee's weekly rate based on the hourly rate and the hours per week. You can enter a different hourly rate if you choose.
Compensation Rate	Displays the amount to be paid as compensation.
Date of Death	If the employee died as a result of the injury, enter the date of death or select the [button] button to select from a calendar.
Marital Status	Enter the code that best describes the employees marital status or select the [button] button to select from a Codes Selection window.

Work Permit Date
Enter the date the work permit was issued or select the button to select the 🔲 button to select from a calendar.

Work Permit #
Enter employee's work permit number.

NCCI Class
Enter the code for the job class as determined by the National Council of Compensation Insurers or select the 🔍 button to select from the Code Selection window.

Job Classification
Enter the job classification code or select the 🔍 button to select from a Codes Selection window.

Active
Select the check box if the employee is currently employed by your organization.

Full Time Employee
Select the check box if the employee works at least 40 hours per week.

Exempt
Select the check box if the employee is a salaried employee.

Hired in Jurisdiction
Select the check box if the employee was hired in the same OSHA jurisdiction as the one you selected on the Claim Info tab.

Disability Option
Enter the code that best describes the disability option available to the employee or select the 🔍 button to select from the Code Selection window.

AWW Rate Calculations
Select the button to open the Work Comp Average Weekly Wage window.

> Note: This window is only available for a few jurisdictional states.

Indemnity Rate Calculations
Select the button to open the Benefit Calculator window.

Leave Mgt
Select the button to open the Leave Management window.

Work Comp Average Weekly Wage Window

Use the Average Weekly Wage window to calculate an employee's average weekly earnings for a selected number of weeks specified by the jurisdiction . For the calculation, RISKMASTER sums earnings for the selected weeks and includes any bonuses.

To open
From the Employment Info tab, select the AWW Rate Calculations button.

Field definitions

Wrk Days/Wk
Enter the number of 8 hour days the employee works in a week.

Daily Earn	Enter the dollar amount the employee earns in one day.
Constant Wage	Enter the dollar amount the employee earns in one week. Based on the hourly rate and the hours per week you enter in the Employment Info tab, RISKMASTER automatically calculates the Constant Wage when you select the Set All button.
Set All	Select to use the constant wage amount for all weeks in the selected period.
Last Work Week	Enter the last day that the employee worked. Based on this date, RISKMASTER sets the weekly pay periods on the window.
All Bonuses	Enter any bonuses the employee received during the selected period. RISKMASTER includes the amount in the average weekly wage calculation.
Include Zero Amts in Calc	Select the check box to include zero-amount pay periods in the average weekly wage calculation.
Last AWW	Displays the last calculated average weekly wage.
AWW	Displays the average weekly wage for the current calculations.
Calculate	Select to calculate and display the average weekly wage for the selected period, based on the wage amounts you enter and the bonuses the employee received.
Clear	Select to clear all the unsaved values.
Return AWW	Select to enter the average weekly wage into the Weekly Rate field on the Employment Info window.
Close	Select to close the window without saving the calculated weekly wage.

Primary Diagnosis History Window

Use the Primary Diagnosis History window to select the ICD-9 primary diagnosis code for a case.

> Note: You can get more information from the medical disability advisor.

To open	On the Workers' Compensation window: Medical Info tab , or Non-Occupational window: Medical Info tab from the (ICD-9) Primary Diagnosis field, select the button.

Field definitions

ICD9 (Primary Diagnosis)	Enter the code that best describes the primary diagnosis or select the button to open the Code Selection window.
Date	Enter the date on which the primary diagnosis was made or select from the calendar.
Changed By	Displays the name of the current system user entering the information.

Approved By	Enter the name of the person who approved the primary diagnosis.
Reason	Select the ▀▀▀ button to open the RISKMASTER Editor and enter the reasons for primary diagnosis.
OK	Select the button to save the changes to the ICD9 primary diagnosis field.
Cancel	Select the button to close the Primary Diagnosis History window.
table	Displays the available ICD-9 primary diagnosis.

Workers' Compensation: Medical Info Tab

Use the Medical Info tab to enter information about the medical treatment rendered to the injured employee.

To open	From the Workers' Compensation windowor Non-Occupational Claims window , select the Medical Info tab.

Field definitions

Hospital	Select the ▀▀▀ button to open the Standard Entity Search window to search for and select the hospital where the employee was treated. Note: **To** remove an existing hospital from the Hospital field, select the record and select ➡ .
Hospital Date Range	Enter the date range for which the employee was hospitalized or select the ▦ button to select the date from the calender.
Disability Type	Enter the code for the employee's disability type or select the 🔍 button to select from the Code Selection window.
Illness Type	Enter the code for the employee's illness type or select the 🔍 button to select from the Code Selection window. Note: The field is active only when you select the Disability Type as Illness.
Injuries	Enter the code that best describes the injuries the employee sustained or select the 🔍 button to select from the Code Selection window. Note: The field is active only when you select the Disability Type as Injury.
(ICD9) Primary Diagnosis	Select the ▀▀▀ button to open the Primary Diagnosis window and select ICD 9 codes.
(ICD10) Primary Diagnosis	Select the ▀▀▀ button to open the Primary Diagnosis window andselect ICD 10 codes.

Physicians

Select the ··· button to open the Standard Entity Search window and select the physician who made the primary diagnosis.

MDA Topic

Select the ··· button to open the RISKMASTER Editor and enter the Medical Disability Advisor topic.

Disability Guideline

Select to open the disability guideline.

MDA Factor

Displays the Medical Disability Advisor factor based on the MDA topic you select.

Treatment

Enter the code that best describes the treatment for the injury or illness or select the button to select from the Code Selection window.

Other Treatment

Enter any other treatment other than those described by the codes or select the button to open the RISKMASTER Editor.

Diagnosis

Enter the code that best describes the diagnosis or select the button to select from the Code Selection window.

Body Parts

Enter the code that best describes the limbs, bones, or organs involved in the injury or select the button to select from the Code Selection window.

Medical Conditions

Enter the code that best describes any existing medical conditions or select the button to select from the Code Selection window.

Other Medical Conditions

Select the button to open the RISKMASTER Editor and enter any other medical conditions.

Major Hand

Enter whether the Right or the Left hand is the major hand or select the button to select from the Code Selection window.

MMI Date

Enter the date on which the injured/ ill employee reached Maximum Medical Improvement (MMI).

Case Managers

Select the button to open the Case Manager History window.

Treatment Plan

Select the button to open the Treatment Plan/Medical Chronology window.

Medical Mgt Savings

Select the button to open the Medical Management Savings List window.

Workers' Compensation: Event Detail Tab

Use the Event Detail tab to enter general information about the event related to this claim . RISKMASTER automatically updates this tab, if you open the Claim window from the Event window.

If you enter a claim before, you enter the associated event, then RISKMASTER uses the information in this tab to create a new event for this claim.

To open　　　　From the Workers' Compensation window, select the Event Detail tab.

Field definitions

Location Description

Select the ![] button to open the RISKMASTER Editor and enter a description of where the event occurred.

Event On Premise　　Select the check box if the event occurred,

- on your organization's property (if you are self-insured).

- on the insured organization's property (if you are a TPA).

Location Address　　Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.

County of Injury　　Enter the county where the event occurred.

Primary Location　　Enter the code that best describes the exact location where the event occurred or select the

![] button to select from the Code Selection window.

Location Type　　Enter the code that best describes the location type where the event occurred or select the

![] button to select from the Code Selection window.

Cause Code

Enter the code that best describes what caused the event, or select the ![] button to select from the Codes Selection window.

Number of Injuries　　Enter the number of persons injured as result of the event.

Number of Fatalities　　Enter the number of deaths that resulted from the event.

Event Description

Select the ![] button to open the RISKMASTER Editor and enter additional event information that is used in FROI.

Injury From and To　　If the injury occurred over a period of time, enter the beginning and end dates for the period

over which the injury occurred or select the ![] button to select from a calendar.

Time Workday Began　　Enter the time when the employee started working every day.

OSHA Recordable	Select the check box if the claim is OSHA recordable.
Lost Consciousness	Select the check box if the employee lost consciousness because of injury.
OSHA Accident Description	Select the ![edit] button to open the RISKMASTER Editor. Enter the OSHA accident description and then select OK.
Regular Job at Time of Event	Select the check box if the employee was working on a task associated with the employee's regular job, when injured.

Restricted Days Window

When an employee cannot work in regularly scheduled capacity and returns to work in a reduced capacity, use the Restricted Days window to enter information about the employee's work restrictions .

To open	▪ On the Workers' Compensation window:Case Mgt/ RTW tab, select the Restrictions button.
	▪ From the Restricted days window, select the Add New button.

Field definitions

Total Restricted Days

First Day Restricted	Enter the date from which the employee can only work in a limited or restricted capacity or select the ![calendar] button to select from the calendar.
	Note: If you select the event date as the first day restricted, then you cannot change the event date in the event record.
Last Day Restricted	Enter the date after which the employee no longer has work restrictions and the employee can resume regularly scheduled work or select the ![calendar] button to select from the calendar.
Duration	Based on the First Day Rstc. and Last Day Rstc. you enter, RISKMASTER calculates the duration of time for which the employee had work restrictions.
Percent Disabled	Enter the percentage of the disability caused to the employee because of the injury.
Back to Restricted Days List	Select the button to return to the Restricted days window.
Position	Enter the code that best describes the employee's job during the restricted work days or select the ![search] button to select from the Code Selection window.
	If the employee will continue to do regular job when disabled, leave the field blank and RISKMASTER will automatically enter the position from the Employment tab when you save the record.

Lost Days Window

Use the Lost Days window to enter information about the employee's absence from work related to the claim.

| **To open** | ▪ On the Workers' Compensation window, Case Mgt/ RTW tab, select the Work Loss button. |
| | ▪ From the Work Loss List window, select the Add New button. |

Field definitions

Last Work Day	Enter the last day that the employee worked or select it from the calendar.
Return to Work	Enter the date on which the employee resumed work or select it from a calendar.
Duration	Based on the Last Work Day and Return to Work you enter, RISKMASTER calculates the duration of time for which the employee did not come to work. The duration calculation is based on the work week you select on the Employment Info tab.
State Duration	Based on the Last Work Day and Return to Work you enter, and on the state mandated work week, RISKMASTER calculates the duration of time for which the employee did not come to work.
Back to Work Loss List	Select the button to return to the Work Loss List window.
Calculate Durations	Select to calculate the duration for which the employee did not come to work.

Workers' Compensation Window

Use the Workers' Compensation window to enter detailed information about claims related to work injuries.

> Note: Every claim must be associated with an event . CSC recommends that you record the event information before the claim. This ensures that multiple claims related to a single event are properly linked to that event record.

| **To open** | ▪ From the main menu, select Document. |
| | ▪ From the Document menu, choose Workers' Comp. |

Field definitions

Claim Info tab

Event Detail tab

Employee Info tab

Employment Info tab

Medical Info tab

Case Mgt/RTW tab

Jurisdictionals tab

Persons Involved	From the left navigation tree, select Persons Involved under the Workers Compensation claim node to open Persons Involved window.
Adjuster	From the left navigation tree, select Adjuster under the Workers compensation claim to open the Adjuster Information window.
Litigation	From the left navigation tree, select Litigation under the Workers Compensation claim node to open the Litigation window.

Defendant	From the left navigation tree, select Defendant under the Workers Compensation claim node to open the Defendant window.
OSHA	From the left navigation tree, select OSHA Information under the Workers Compensation claim node to open the OSHA Information window.
Financials	From the left navigation tree, select Financials under the Workers Compensation claim node to open the Reserves window.
WC PDF Forms	Select to open the WC PDF Forms window to view and open the available workers compensation forms.
FROI	Select to open the Preparer Information window.
	On the Preparer Information window, enter the preparer information and select Attach form to Claim to attach the First Report form to the claim record.

Workers' Compensation: Jurisdictionals Tab

Use the Jurisdictionals tab to enter information that you want RISKMASTER to enter into First Report of Injury forms (FROIs) for the jurisdictional state you selected.

> Note: From this tab, you can open the completed First Report of Injury forms in Adobe Acrobat Reader. You can then enter additional information into the forms and print the forms.

To open	From the Workers' Compensation window, select the Jurisdictionals tab.

Field definitions

Data entry fields	RISKMASTER uses the information you enter into these fields along with other information you entered into RISKMASTER to populate the First Report forms.
FROI	Select the button to display the Preparer Information window and enter preparer information for the FROIs. Once you enter preparer information you can view the First Report forms available for the state you selected.
	For example:
	California: Employer's Report of Occupational Injury or Illness
	Michigan: Employer's Basic Report of Injury
	Alabama: Employer's First Report of Injury or Occupational Disease
	And so on.
	Select a form to open the form in Adobe Acrobat.
WC PDF Forms	Select to open the WC PDF Forms window and display the claim forms available for this claim.

Employee Dependent Window

Use the Employee Dependent window to enter details about the employee's dependents.

To open	From the Employee window, select the Dependents button.

Field definitions

Dependent's Last Name	Enter the dependent's last name.
First Name	Enter the dependent's first name.
Middle Name	Enter the dependent's middle name.
Address	Enter the dependent's address. Enter the City, State, Zip, and Country in the appropriate fields.
Relation to Employee	Enter the code that best describes the dependent's relationship with the employee or select the button to select from the Code Selection window.
Included in Employees health plan	Select the check box if the dependent is covered in the employee's health plan.
Soc. Sec No.	Enter the dependent's Social Security Number (SSN).
Date of Birth	Enter the employee's date of birth or select the button to select from a calendar.
Age	Enter the employee's current age.
Sex	Enter the employee's gender or select the button to select from the Code Selection window.
Back	Select the button to open the Employee window.

Health Claim

Health Claims

This type of claim involves incidents resulting in disability, death or a severe accident.

In you can create and process Health liability claims. A Health liability claim must be associated with an event.

A Health claim encompasses several claims:

- Disability Claims
- Policy Supplemental Claims
- Accident Claim

Note: It is supported for carrier clients.

How to Navigate

1. From the main menu, select Document.
   The Document menu opens.

2. From the Utilities menu, select Health Claim.
   The Health Claim Window opens.

Field Help

Claim Info Tab

Use the Claim Info tab to enter general information about a Health claim.

To open   From the Health Claim Window, select the Claim Info tab.

Field definitions

Event Number   Enter the event number.

- If you open the Worker's Compensation window from the Event window, displays the event number.

- If you open the Worker's Compensation window directly, RISKMASTER will create a new event and add the event number to this field when you save the claim.

Claim Number   Enter a unique number for the claim. If you leave blank and RISKMASTER generates a claim number when you save.

Policy LOB   Enter the code that best describes the insurance line of the policy against which the claim is made or select the Lookup Active button to select from the code selection window.

> Note: The Policy LOB field is visible only when **the Use Carrier Claims check box on the General System Parameter Setup: Carrier Claim Settings tab is selected.**

Claim Type   Enter the claim type or select the Search button to select from the Code Selection window.

Department   Enter the department, the individuals or equipment involved in the event belonged to or select the Toolbar Search button to select from the Org Hierarchy window.

> Note: If the department you enter requires special instructions, instructions for that department will automatically open.

Claim Status   Enter the code that best describes the claim status, select the Toolbar Search button to select from the Code Selection window .

Date Closed   Displays the date on which a claim was closed.

> Note: This field is active when the Claims Status is selected as Closed.

Close Method	Enter the code that best describes the claim closure method or select the Toolbar Search button to select from the Code Selection window.
Current Adjuster	Displays the current adjuster name.
	Note: RISKMASTER automatically displays the name as filled in the Adjuster window.
Date of Event	Enter the date on which the event occurred or select the Toolbar Calender button to select the date from the calendar.
Time of Event	Enter the time when the event occurred.
	Note: You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.
Date of Claim	Enter the date on which the insured or the carrier is given notice of the claim or select the Toolbar Calender button to select the date from the calendar.
Time of Claim	Enter the time on which the insured or the carrier is given notice of the claim.
Date Reported	Enter date on which the event was reported or select the Toolbar Calender button to select the date from the calendar.
Event Date Rptd.	Enter the date on which the event was reported
Event Time Rptd.	Enter the time at which the event was reported.
Claim Date Rptd.	Enter the date on which claim is reported or select the Toolbar Calender button to select the date from the calendar.
File Number	Enter any special identification number that your organization uses such as the box number or the insurance company's case number.
Policy Name	Enter a policy name that you want to attach to the claim or select the Toolbar Ellipses button to select from the Policies window.
	Note: RISKMASTER displays all policies that meet the criteria based on the claim's Department, Claim Type, Effective Dates, Policy Status, and Trigger Method. You can attach a policy to a claim only when it fulfills the five filters.
LSS Claim	Select the check box if you want the claim to be sent to Legal Solution Suite (LSS).
Payments Frozen	Select the check box if you want to prevent any payments to be made against the claim.
	Note: The claim remains open but no payments are made until you clear this check box. You can only use this check box if you have the appropriate permissions.
Jurisdiction	Enter the state in which you must file OSHA reports for the claim or select the Toolbar Search button to select from the Codes Selection window.

Currency Type	Enter the currency type or select the search button Look-up Active to select from the Code Selection window.

> Note: By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Event Detail Tab

Use the Event Info tab to enter general information about the **event** related to **Health claim** . RISKMASTER automatically updates this tab, if you open the Claim window from the Event window.

If you enter a claim before entering an event, RISKMASTER uses the information on this tab to create a new event for this claim.

To open	From the Health Claims window, select the Event Detail tab.

Field definitions

Location Address	Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.
County of Injury	Enter the county where the event occurred.
Location Description	Enter a description for the location where the event occurred or select the button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description and then select OK.
Authority Contacted	Enter the person who was informed of the event, or select the button to open the Standard Entity Search window and search for the authority contacted.
Event On Premise	Select the check box if the event occurred,

  - on your organization's property (if you are self-insured).

  - on the insured organization's property (if you are a TPA).

Primary Location	Enter the code that best describes the exact location where the event occurred or select the button to select from the Code Selection window.
Location Type	Enter the code that best describes the location type where the event occurred or select the button to select from the Code Selection window.
Cause Code	Enter the code that best describes the event cause or select the button to select from the Code Selection window.
Number of Injuries	Enter the number of persons injured as result of the event.
Number of Fatalities	Enter the number of deaths that resulted from the event.

Event Description

Enter a description for the event or select the ![edit button] button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description and then select OK.

Loss Information Tab

To open   From the Health Claims window, select the Loss Information tab.

Field definitions

Special Handling Flag   Select the check box to flag the claim for special handling.

Report Number   Enter the reference number given to the official report by the Authority Contacted.

Date of Discovery

Enter the date on which the theft of property was first discovered missing or select the ![calendar button] button to select from a calendar.

Claim Loss Type   Select the Claim Loss Type.

Loss Description   Enter a description detailing the loss.

Notice Date   Enter the notice date of the claim.

Error Date   Enter the error date of the claim. .

Underlaying Loss Date   Enter the underlaying loss date of the claim.

Non-Occupational Claims

Non Occupational Claims

Use the Non Occupational Claims window to enter detailed information about the claims related to injuries or illnesses resulting in disability.

| Tips |

To Enter a Non-Occupational Claim

1. From the main menu, select Document.

The Document menu opens.

2. From the Document menu, choose Non Occupational.
   The Non Occupational Claim window opens and a Claim node displays in the navigation tree.
3. Complete the fields on the following tabs.
4. Select and complete the fields on the Claim Info tab , as shown below.

Event Number	• If you open the Claim window from the Event window, displays the event number.
	• If you open the Claim window directly, RISKMASTER will create a new event and add the event number to this field when you save the claim.
Claim Number	Enter a unique identifying number for the claim. If you leave the field blank RISKMASTER will generate a claim number when you save the claim.
Claim Type	Enter the code that best describes the claim type or select the button to select from the Code Selection window.
Employee No.	Enter the a unique number that an organization assigns to an individual employee or select the button to open the Standard Entity Search window and select the employee associated with the claim.
	When you select the Employee No. RISKMASTER automatically updates the Employee Info tab.
	Note:Search for the Employee No. before you enter a new Employee No. This prevents duplicate entries in the database.
Department	Enter the department, the individuals or equipment involved in the event belong to or select the button to select from the Org Hierarchy window.
	Note: If the department you enter requires special instructions, instructions for that department automatically opens.
Instr	Select to open the Claim Entity Instructions window and view the claim instructions for the selected department.

Note: You see this button if a user defined claim instructions for the department you selected for this claim.

Claim Status	Enter the code that best describes the claim status, or select the [🔍] button to select from the Code Selection window.
Detail	Select to open the Claim Status History window and review or print the claim status history for this claim.
Date Closed	For a closed claim, displays when the claim was closed.
Close Method	When you close a claim, enter the code that best describes claim closure method or select the [🔍] button to select from the Code Selection window.
Current Adjuster	If an adjuster is assigned to the claim, displays the adjuster's name. Use the Adjuster Information window to assign an adjuster to a claim.
Time of Event	Enter the time when the event occurred. Note: If you don not enter a time, the time defaults to 12.00 Am. If you want the time field to stay blank by default, you must set this up in the System Setup Parameters window in Utilities .
Date of Event	Enter the date when the event occurred or select the [📅] button from the calendar.
Date of Claim	Enter the date when your organization learned of the claim or select the [📅] button from the calendar.
Time of Claim	Enter the time when your organization learned of the claim.
Date Reported	Enter the date when your organization learned of the event or select the [📅] button from the calendar.
Time Reported	Enter the time when your organization learned of the event.
Disability Start Date	Enter the first day on which the disability benefits become effective or select the [📅] button from the calendar.
Disability To Date	Enter the last day on which the disability benefits will remain effective or select the [📅] button from the calendar.
Benefit Disability Type	If the employee is eligible for multiple Benefit Disability types, enter the code for the Benefit Disability type that you will use for this claim or select the [🔍] button to select from the Code Selection window. Note: RISKMASTER uses the waiting period that matches the Disability Type you select from the Alternate Waiting Period tab on the Non-Occupational Plan Class window.
File Number	Enter the insurance company's case number.
Plan Name	Enter a Non-Occupational Disability Plan applicable to the claim or select the [···] button to select from the Plans window.

Note: RISKMASTER displays all plans that meet the criteria based on the claim's Department, Claim Type, Effective Dates, Plan Status, and Trigger Method.

Open

Select to open the Non-occupational disability plan administration window for the plan associated with the claim.

Class Name

From the drop down list, select a plan class.

Service Code

Enter the code that best describes who is responsible for processing the claim or select the [search] button to select from the Code Selection window.

Payments Frozen

Select the check box to stop all payments on an open claim.

You can only use this check box if you have the appropriate permissions.

Email FROI To

Enter the e-mail address to which you want to send Fist Report of Injury (FROI).

LSS Claim

Select the check box if you want the claim to be sent to Legal Solution Suite (LSS).

Leave Only

Select the check box if the claim only involves a leave and is used for tracking leave time only and does not include disability benefit payments. When you select this check box you can save a claim without completing all the required fields, specifically Disability Start Date, Jurisdiction and Plan Name.

Jurisdiction

Enter the state in which you must file OSHA reports for the claim or select the [search] button to select from the States window.

Currency Type

Enter the currency type or select the search button [search] to select from the Code Selection window.

Note: By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Catastrophe Type

Select the button to select the required catastrophe type associated with the claim.

Note : The catastrophe can be of various types

• Death

•Ice

•Earthquake

•Multiple Vehicle Accident

•Fire

• Theft

•Flood

• Tornado

•Hail

•Workers Compensation Accident

•Hurricane

• Windstorm

Note: From the Catastrophe Type field when you select a type of catastrophe, the Catastrophes window opens and lists all the catastrophes present in database based on chosen type and that meet the criteria (Event Date must lie between Loss Start Date and Loss End Date). Select 'Yes' and then choose a catastrophe record. The Catastrophe No. of the selected record displays in the Catastrophe Number field.

Catastrophe Number   Displays the number of the catastrophe record attached to the claim.

Note: The number displays based on selection made in Catastrophe Type field.

5.   Select and complete the fields on the Event Info tab, as shown below.

5.

Location Description   Select the ✎ button to open RISKMASTER Editor and enter a description for the location where the event occurred.

Event On Premise   Select the check box if the event occurred,

- on your organization's property (if you are self-insured).

- on the insured organization's property (if you are a TPA).

Location Address   Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.

County of Injury   Enter the county where the event occurred.

Primary Location   Enter the code that best describes the exact location where the event occurred or

select the 🔍 button to select from the Code Selection window.

Location Type	Enter the code that best describes the location type where the event occurred or select the [🔍] button to select from the Code Selection window.
Cause Code	Enter the code that best describes what caused the event, or select the [🔍] button to select from the Codes Selection window.
Number of Injuries	Enter the number of persons injured as result of the event.
Number of Fatalities	Enter the number of deaths that resulted from the event.
Event Description	Select the [✎] button to open the RISKMASTER Editor and enter additional event information that is used in FROI.
Injury From and To	If the injury occurred over a period of time, enter the beginning and end dates for the period over which the injury occurred or select the button to select from a calendar.
Time Workday Began	Enter the time when the employee started working every day.
Lost Consciousness	Select the check box if the employee lost consciousness as a result of the injury.
PI OSHA Recordable	Select the check box if the event is PI OSHA recordable.
PI OSHA Accident Description	Select the [✎] button to open RISKMASTER Editor and enter PI OSHA accident description.
Regular Job at Time of Event	Select the check box if the employee was working on a task associated with the employee's regular job, when injured.

6.
7.   Select and complete the fields on the Employee Info tab, as shown below.

Non Occupational Claim

Claim Info | Event Info | Employee Info | Employment Info | Medical Info | Case Mgt/RTW | Supplementals

Last Name		**Soc.Sec No.**	
First Name		Date Of Birth	
Age			
Middle Name		Initials	
Office Phone		Home Phone	
Also Known as			
Address 1		Fax	
Address 2		Sex	
City		Title	
State		Zip/Postal Code	
Cost Center			
County		Attorney	
Country			

Non-Occ Payments

Last Name	Displays the employee's last name based on the Employee No. you enter on the Claim Info tab.
First Name	Displays the employee's first name.
Middle Name	Displays the employee's middle name, if any.
Also Known as	Enter employee's nick name, or any other name that the employee was known by.
Initials	Enter employee's name initials.
Address	Enter the employee's address. Enter the City, State, Zip, County, and Country in the appropriate fields.
Soc. Sec. No.	Enter employee's social security number .
Date of Birth	Enter employee's date of birth or select the 🔲 button from the calendar.
Age	Based on the date of birth you entered, RISKMASTER displays the employee's age at the time of the event .
Office Phone	Enter the employee's office phone number.
Home Phone	Enter the employee's home phone number.
Fax	Enter the employee's fax number.

Sex

Enter the code for the employee's gender or select the [🔍] button to select from the Code Selection window.

Title

Enter the employee's official title, if any.

Cost Center

Enter the employee's assigned accounting cost center or select the [🔍] button to select from a Codes Selection window.

Custom Tax Percentages

you enter new tax percentages in these fields, it will override the tax percentages that are specified in the associated plan.

Federal

Enter the Federal tax you want to deduct from the gross calculated payment.

SS

Enter the Social Security tax you want to deduct from the gross calculated payment.

Medicare

Enter the Medicare tax you want to deduct from the gross calculated payment.

State

Enter the State tax you want to deduct from the gross calculated payment.

Employee Claim History

Select the button to open the Claim Involved History window.

Dependents

Select the button to open the Employee Involved Dependent window.

Attorney

Enter the employee's attorney or select the [...] button to open the Standard Entity Search window and select the attorney.

8.   Select and complete the fields on the Employment Info tab, as shown below.

Date Hired

Enter the date of hiring of the employee or select the 🔲 button to select from the calendar.

Termination Date

If the employee no longer works for your organization, enter the last day that the employee worked or select the 🔲 button to select from the calendar.

Position Code

Enter the code that best describes the employees job or select the 🔍 button to select from the Code Selection window.

Department

Enter the code for the department the employee worked for or select the 🔍 button to select from the Org Hierarchy window.

Supervisor

Enter the employee's supervisor or select the ▪▪▪ button to open the Standard Entity Search window and select the supervisor.

Pay Type

Enter the code that indicates whether an employee is salaried or is paid hourly or select the 🔍 button to select from the Code Selection window.

Work Week

Select the check boxes for all the days of the week that the employee works.

Pay Amount

If the employee is salaried, enter the employee's salary.

Hourly Rate

If the employee is paid hourly, enter the employee's hourly pay or.

Hours Per Week

Enter the employee's regularly scheduled number of work hours per week.

Weekly Rate

RISKMASTER calculates the employee's weekly rate based on the hourly rate and the hours per week. You can enter a different hourly rate.

Monthly Rate

RISKMASTER calculates the employee's monthly rate based on the weekly rate and the hours per week.

Date of Death

If the employee died as a result of the injury, enter the date of death or select the 🔲 button to select from a calendar.

Marital Status

Enter the code that best describes the employees marital status or select the 🔍 button to select from a Codes Selection window.

Work Permit Date

Enter the date the work permit was issued or select the 🔲 button to select the date from a calendar.

Work Permit #

Enter employee's work permit number.

NCCI Class   Enter the code for the job class as determined by the National Council of

Compensation Insurers or select the [🔍] button to select from the Code Selection window.

Job Classification

Enter the code for the job classification or select the [🔍] button to select the code from the Code Selection window.

Active   Select the check box if the employee is currently employed by your organization.

Full Time Employee   Select the check box if the employee works at least 40 hours per week.

Exempt   Select the check box if the employee is a salaried employee.

Hired in   Select the check box if the employee was hired in the same OSHA jurisdiction as the
Jurisdiction   one you selected on the Claim Info tab.

Disability Option   Enter the code that best describes the disability option available to the employee or

select the [🔍] button to select from the Code Selection window.

AWW Rate   Select the button to open the Work Comp Average Weekly Wage window.
Calculations
                         This window is only available for a few jurisdictions.

Leave Mgt   Select the button to open the Leave Management window.

9.   Select and complete the fields on the Medical Info tab, as shown below.

Hospital

Select the ▪▪▪ button to open the Standard Entity Search window to search for and select the hospital where the employee was treated.

To remove an existing hospital from the Hospital field, select the record and select ⇥.

Hospital Date Range

Enter the date range for which the employee was hospitalized or select the 🗓 button to select from the calender..

Disability Type

Enter the code for the employee's disability type or select the 🔍 button to select from the Code Selection window.

Illness Type

Enter the code for the employee's illness type or select the 🔍 button to select from the Code Selection window.

The field is active only when you select the Disability Type as Illness.

Injuries

Enter the code that best describes the injuries the employee sustained or select the 🔍 button to select from the Code Selection window.

The field is active only when you select the Disability Type as Injury.

(ICD9) Primary Diagnosis

Select the ▪▪▪ button to open the Primary Diagnosis window.

Physicians

Select the ▪▪▪ button to open the Standard Entity Search window and select the physician who made the primary diagnosis.

MDA Topic

Select the ▪▪▪ button to open the RISKMASTER Editor and enter the Medical Disability Advisor topic.

MDA Factor

Displays the Medical Disability Advisor factor based on the MDA topic you select.

Treatment

Enter the code that best describes the treatment for the injury or illness or select the 🔍 button to select from the Code Selection window.

Other Treatment

Select the 📝 button to open the RISKMASTER Editor and enter any other treatment.

Diagnosis

Enter the code that best describes the diagnosis or select the 🔍 button to select from the Code Selection window.

Body Parts	Enter the code that best describes the limbs, bones, or organs involved in the injury or select the 🔍 button to select from the Code Selection window.
Medical Conditions	Enter the code that best describes any existing medical conditions or select the 🔍 button to select from the Code Selection window.
Other Medical Conditions	Select the 📝 button to open the RISKMASTER Editor and enter any other medical conditions.
Major Hand	Enter whether the Right or the Left hand is the major hand or select the 🔍 button to select from the Code Selection window.
STD Disability Type	Enter the code that best describes the STD disability type or select the 🔍 button to select from the Code Selection window.
MMI Date	Enter the date on which the injured/ ill employee reached Maximum Medical Improvement (MMI).
Treatment Plan	Select the button to open the Treatment Plan/Medical Chronology window.
Medical Mgt Savings	Select the button to open the Medical Management Savings List window.

Select and complete the fields on the Case Mgt/RTW tab, as shown below.

9.

Primary Case Manager Summary

Case Manager	Displays the primary case manager for this case. You select the primary case manager on the Case Manager History window.

Case Status	Displays the code for the case status. You enter this information on the Case Manager History window.
Referral Date	Displays the date on which the referral was issued. You enter this date on the Case Manager History window.
Days with Case Mgr	Displays the number of days the case was with the case manager, based on the Date Closed.
RTW Management	
RTW Status	Enter the code that best describes the return to work status for the claimant or select the [🔍] button to select from the Code Selection window.
Restricted Work	
Current Restricted Days?	- This check box is selected if you have not entered an actual last restricted day on the Restricted Days window. - This check box is not selected if you entered an actual last day on the Restricted Days window.
Est. Release from Rst.	Enter the estimated date on which the claimant will be released from work restrictions .
	The minimum, optimum and maximum restricted work durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower section of the window.
Actual Last Rst Day	Displays the last day you entered on the Restricted Days window, if you set the RTW Status as Released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the First Day Restricted you entered on the Restricted Days window, the Estimated Release from Restriction. date and the work week.
Total Restricted Days	Displays the total number of restricted days based on the First Day Restricted and the Last Day Restricted you entered on the Restricted Days window. If there is no Last Day Restricted, then the total number of restricted days is based on today's date. The previous durations on the Restricted Days window are also considered in this calculation.
MDA Duration - Days/Date	**Job Classification**: displays the job classification you selected on the Employment Info tab. **Minimum**: displays the minimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected. **Optimum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.

- **Maximum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected

Work Loss

Current Work Loss?	• This check box is selected if you have not entered a Return To Work day on the Lost Days window.
	• This check box is not selected if you entered a Return To Work day on the Lost Days window.
Est. RTW Date	Enter the estimated date on which the claimant can return to work.
	The minimum, optimum and maximum work loss durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower half of this section.
Actual RTW Date	Displays the return to work date you entered on the Lost Days window, if you set the RTW Status as released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the Last Work Day you entered on the Lost Days window, the Estimated Return to Work date and the work week.
Total Lost Days	Displays the total number of lost days based on the Last Work Day and the Return to Work date you entered on the Lost Days window. If there is no Return to Work date, then the total number of lost days is based on today's date. The previous durations on the Lost Days window are also considered in this calculation.
MDA Durations- Days/Date	• **Job Classification**: displays the job classification you selected on the Employment Info tab.
	• **Minimum**: displays the minimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	• **Optimum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected.
	• **Maximum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD9 code, MDA topic and MDA factor you selected
Case Managers	Select to open the Case Manager History window.
Restrictions	Select to open the Restricted Days window.

Work Loss	Select to open the Lost Days window.
Accommodation	Select to open the Accommodation window.
Vocational Rehabilitation	Select to open the Vocational Rehabilitation window.
Medical Disability Guidelines	Select to open the Medical Disability Advisor.

10.   10. From the toolbar, select the Save button .

11. To enter details about the short-term disability period and to make Non-Occupational Disability payments, select the Non-Occ Payments button.

12. Complete the fields on the Non-Occ Payments window , as shown below.

Claim Info tab

Employee Eligible for Benefits. Eligible On	Displays the date on which the employee becomes eligible to get benefits from the plan you specified on the Claim Info tab. This date depends on the employee's date of hire and the waiting periods you specified on the Non-Occupational Disability Plan Administration window.
Disability Start Date	Displays the disability start date you entered on the Claim Info tab.
Benefits Start Date	Displays the date on which disability benefits for this claim will start. RISKMASTER calculates this date based on the disability start date you entered on the Claim Info tab, and the waiting periods you entered on the Non-Occupational Disability Plan Class window .Note: Date is calculated based on the associated plan's rules.
Plan Name	Displays the plan class you entered on the Claim Info tab. The short term disability payments for this claim will be made from this plan class.
Calculation Method	Displays the weekly benefit calculation method you selected on the Non-Occupational Disability Plan Class window.
Monthly Wage	Displays the monthly wage rate you entered on the Employment Info tab.
Monthly Supplement	Displays the monthly supplements you selected on the Non-Occupational Disability Plan Class window.

Monthly Benefit   Displays the monthly benefit amount RISKMASTER calculates, based on the monthly wage you entered on the Employment Info tab, and other disability information you entered.

Benefit Period

Note : You can change the Benefit Through Date calculated based on the rules of associated plan and enter required dates in the field.

Benefits Start   Displays the date on which disability benefits will start. RISKMASTER calculates this date based on the disability start date you entered on the Claim Info tab, and the waiting periods you entered on the Non-Occupational Disability Plan Class window.

Select the button to select a different date from a calendar.

Benefits Through   Displays the date on which disability benefits will end. RISKMASTER calculates this date based on the benefit start date or the disability start date you entered on the Claim Info tab, and the maximum duration of disability you entered on the Non-Occupational Disability Plan Class window.

Select the button to select a different date from a calendar.

Payments Calculator

se to calculate and display the payment for the first pay period within the disability period. This payment can be a partial payment that covers the number of benefit days from the benefits start date to the end of the first pay period.

You must change the Benefits Through Date on the Benefit Period tab in order to change the Payments Through date if you make any changes to the fields on this tab, you must save the record before selecting the Calculate Payments or Future Payments buttons , else the payment calculations will not reflect your changes. The state tax calculation uses the jurisdiction specified on the claim plus any tax and offset mapping information that applies to the state.

Payments Beginning   Displays the benefits start date. Select the button to select a different date from a calendar.

Payments Through   Displays the maximum benefits date. Select the button to select a different date from a calendar.

This date cannot be later than the maximum benefits date. To change this date to be later than the maximum benefits date, first change the maximum benefits date and then change the through date.

Deduct Federal Tax   Select the check box to deduct Federal tax from the gross calculated payment. The amount of federal tax deducted will depend on the taxable portion you specified on the Non-Occupational Disability Plan Class window.

When you deduct federal tax, RISKMASTER makes a payment for the tax amount to the tax entity you selected in Utilities as the payee .

Deduct Soc Sec Tax   Select the check box to deduct Social Security tax from the gross calculated payment. The amount of social security tax deducted will depend on the taxable portion you specified on the Non-Occupational Disability Plan Class window.

When you deduct social security tax, RISKMASTER makes a payment for the tax amount to the tax entity you selected in Utilities as the payee.

Deduct Medicare Tax	Select the check box to deduct Medicare tax from the gross calculated payment. The amount of medicare tax deducted will depend on the taxable portion you specified on the Non-Occupational Disability Plan Class window.
	When you deduct medicare tax, RISKMASTER makes a payment for the tax amount to the tax entity you selected in Utilities as the payee.
Deduct State Tax	Select the check box to deduct State tax from the gross calculated payment. The amount of state tax deducted will depend on the taxable portion you specified on the Non-Occupational Disability Plan Class window.
	When you deduct state tax, RISKMASTER makes a payment for the tax amount to the tax entity you selected in Utilities as the payee.
Bank Account	From the drop down list, select the sub bank account from which you want to make the benefits payments.
Transaction Type	From the drop down list, select the transaction type you want to use to set the reserve type from which you want to make the payments.
Reserve Type	Displays the reserve from which you will make the payment.
Other Income Offset	Enter the other income offset that is deductible from the payment.
Social Security Offset	Enter the social security offset that is deductible from the gross calculated payment.
Pension Offset	Enter the pension offset that is deductible from the gross calculated payment.
Gross Calculated Payments	Displays the gross calculated payments based upon the plan selected.
Gross Calculated Supplement	Displays the gross calculated supplement payment based upon the plan selected.
Gross Total Net Offsets	Displays the amount after deducting gross total net offset from the net payment.
Net Payment	Displays the total net payment based on the plan selected.
Calculate Payments	Select to open the Disability Payments window and review all existing disability payments for this claim that you have not yet printed.
Back to Claim	Select to return to the claim.
Printed Payments	Select to review all previously printed payments for this claim.
Collection	Select to open the Short term Disability - Collection window.

Future Payments   Select to save the payment and display the payment batch. The payment batch shows all the payments created for this claim. The first and last payments may be partial payments.

13. To add persons involved, from the navigation tree, select Persons Involved under the Non-Occupational claim node and complete the Persons Involved Window.

14. To add adjuster information, from the navigation tree, select Adjuster under the Non-Occupational claim node and complete the Adjuster window.

15. To enter litigation information,from the navigation tree, select Litigation under the Non-Occupational claim node and complete the Litigation window.

16. To add defendant information, select the Defendant button and complete the Defendant window.

17. To set reserves or to add financial information, complete the fields on the Reserves window.

18. Complete the fields on the Reserves window , as shown below.

Reserve   Displays the reserve categories your organization uses.

To edit a reserve, select the reserve. This opens the Reserve for claim window.

Balance   Displays the reserve balance for each reserve category.

Paid   Displays the payments that you have entered for claim or claimant.

When you enter a payment, you have to select a Transaction Type code to determine the reserve category.

Collections   Displays any income related to the claim for each reserve category.

Recoveries or subrogation are also Collections.

Incurred   Displays the balance (plus payments less collections) for each reserve category.

Status   Displays the status of the reserve.

Payment History   Select to open the Payment History for claim window.

Time and Expense   Select to open the Time and Expense window.

Note: You can only see this button if you activated the Time and Expense module in RISKMASTER Utilities .

Add Payment   Select to open the Funds Management window.

Add Collection   Select to open the Funds Management window.

Schedule Checks   Select to open the Schedule Automatic Check Processing window.

Back to Claim   Select to return to the claims window.

Currency Type   From the drop down list, select a currency type.

19. If your organization defined Supplemental data, complete the Supplemental tab.

20. From the toolbar, select the Save button [icon].

> Note: Search for information in existing records, before you enter new data. This prevents double entries in the database. You can select the Display Claimant Name in MDI check box on the General System Parameter Setup window: System Settings tab to view the Claimant Name along with LOB and Claim Number in the navigation tree.

Vehicle Accident Claims

Vehicle Accident Claim

Use the Vehicle Accident window to enter detailed information about vehicle accident claims.

To Enter a Vehicle Accident Claim

1. From the main menu, select Document.
   The Document menu opens.

2. From the Document menu, choose Vehicle Accident.
   The Vehicle Accident Claim window opens and a Claims node displays in the navigation tree.

3. Select and complete the fields in the Claim Info tab, as shown below.

2.

Event Number	• If you open the Claim window from the Event window, displays the event number. • If you open the Claim window directly, RISKMASTER will create a new event and add the event number to this field when you save the claim.
Claim Number	Enter a unique number for the claim or leave blank and RISKMASTER will generate a claim number when you save.
Claim Type	Enter the code that best describes the claim or select the [🔍] button to select from the Code Selection window.
Department	Enter the department, the individuals or equipment involved in the event belonged to or select the [🔍] button to select from the Org Hierarchy window.
Instr	Select the button to display special claim instructions for the department you entered.
Claim Status	Enter the code that best describes the claim status, select the [🔍] button to select from the Code Selection window .
Date Closed	For a closed claim, displays when the claim was closed.
Close Meth.	When you close a claim, enter the code that best describes how the claim was closed or select the [🔍] button to select from the Code Selection window.
Date of Event	Enter the date on which the event occurred or select the button to select from a calendar.
Time of Event	Enter the time when the event occurred. You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.
Date of Claim	Enter the date on which your organization learned of the claim or select the button to select from a calendar.
Event Date Rptd.	Enter the date when your organization learned of the event or select the [📅] button to select from the calendar.
Event Time Rptd	Enter the time when your organization learned of the event.
Claim Date Rptd.	Enter the date when the claim was reported or select the [📅] button to select from the calendar.

Time Reported	Enter the time when the claim was reported.
Est. Collect	Enter the dollar amount that you expect to collect on this claim.
File Number	Enter any special identification number that your organization uses such as the box number or the insurance company's case number.
Policy Name	Enter a policy name that you want to attach to the claim or select the ··· button to select from the Policies window.

> RISKMASTER displays all policies that meet the criteria based on the claim's Department, Claim Type, Effective Dates, Policy Status, and Trigger Method to display the policies on the Code Selection window. You can attach a policy to a claim only when it fulfills the five filters.

Open	Select to open the Policy Maintenance window for the policy attached to the claim.
LSS Claim	Select the check box if you want the claim to be sent to Legal Solution Suite (LSS).
Service Code	Enter the code that best describes who is responsible for processing the claim or select the button to select from the Code Selection window.
Payments Frozen	Select the check box to stop all payments on this claim. The claim remains open but no payments are made until you clear this check box. You can only use this check box if you have the appropriate permissions.
Currency Type	Enter the currency type or select the search button to select from the Code Selection window.

> By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Catastrophe Type	Select the button to select the required catastrophe type associated with the claim.

> The catastrophe can be of various types
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RISKMASTER Accelerator 17.1 User Guide

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From the Catastrophe Type field when you select a type of catastrophe, the Catastrophes window opens and lists all the catastrophes present in database based on chosen type and that meet the criteria (Event Date must lie between Loss Start Date and Loss End Date). Select 'Yes' and then choose a catastrophe record. The Catastrophe No. of the selected record displays in the Catastrophe Number field.

Catastrophe Number	Displays the number of the catastrophe record attached to the claim. Note: The number displays based on selection made in Catastrophe Type field.

3.
4.   Select and complete the fields in the Event Detail tab , as shown below.
4.

Event On Premise	Select the check box if the event occurred,
	
	    • on your organization's property (if you are self-insured).
	
	    • on the insured organization's property (if you are a TPA).

Location Address	Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.
County of Injury	Enter the county where the event occurred.
Location Description	Enter a description for the location where the event occurred or select the button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.
Location Type	Enter the code that best describes the location type where the event occurred or select the button to select from the Code Selection window.
Primary Location	Enter the code that best describes the exact location where the event occurred or select the button to select from the Code Selection window.
Authority Contacted	Enter the person who was informed of the event, or select the button to open the Standard Entity Search window and search for the authority contacted.
Event Description	Enter a description for the event or select the button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.

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Cause Code

Enter the code that best describes the event cause or select the [🔍] button to select from the Codes Selection window.

Number of Injuries   Enter the number of persons injured as result of the event.

Number of Fatalities   Enter the number of deaths that resulted from the event.

5.

6.   Select and complete the fields in the Vehicle Accident tab, as shown below.

Accident Type

Enter the code that best describes the accident type or select the [🔍] button to select from the Code Selection window.

Accident Desc

Enter the code that best describes the accident occurred or select the [🔍] button to select from the Code Selection window.

Date of Federal DOT Report   Enter the date on which a federal Department of Transportation report was filed or select the button to select from a calendar.

Date of State Spill Report   Enter the date on which a state Department of Transportation report was filed or select the button to select from a calendar.

DOT Report #   If you filed a state Department of Transportation report, enter the identifying number for the report.

In Traffic   Select the check box if the accident occurred in moving traffic.

Reportable   Select the check box if you need to report the accident to another organization.

Preventable   Select the check box if the accident was preventable.

7.   From the toolbar, select the Save button [💾].

8.   To add information about a vehicle involved in an accident, select the Unit button and complete the Unit Involved window , as shown below .

Vehicle ID   Enter the unique identifying number your organization uses to identify the vehicle involved in the accident, or select the [...] button to open the Standard Vehicle Search window and search for the vehicle.

Vehicle Make   Enter the vehicle manufacturer.

Vehicle Model   Enter the vehicle model name.

Vehicle Year   Enter the year in which the vehicle was manufactured.

Unit Type

Enter the code that best describes the vehicle or select the [icon] button to select from the Code Selection window.

Department

Enter the entity in your organization hierarchy to which the vehicle is assigned, or select the [icon] button to select from the Org Hierarchy window.

license Number

Enter the vehicle's license plate number.

State

Enter the state where the vehicle is registered.

Damage

Enter a description of the damage to the vehicle or select the [icon] button to open the RISKMASTER Editor. In the RISKMASTER Editor enter the damage description and then select OK.

Claim History

Select to open the Claim Involvement History window.

Back to Vehicle Claim

Select to open the Vehicle Claim window.

9.   To set reserves or to add financial information, select the Financials button and complete the Reserves window.

10.   To add persons involved, from the navigation tree, select Adjuster under the Vehicle Accident Claim node and complete the Persons Involved   window.

11.   To add adjuster information, from the navigation tree, select Adjuster under the Vehicle Accident Claim node and complete the Adjuster window.

12.   To enter litigation information, from the navigation tree, select Litigation under the Vehicle Accident Claim node and complete the Litigation window.

13.   To enter OSHA information, from the navigation tree, select OSHA under the Vehicle Accident Claim node and complete the OSHA Information window.

14.   To add claimant information, from the navigation tree, select Claimant under the Vehicle Accident Claim node and complete the Claimant window.

15.   To add defendant information, from the navigation tree, select Defendant under the Vehicle Accident Claim node and complete the Defendant window.

16.   If your organization defined Supplemental data, complete the Supplemental tab.

17.   From the toolbar, select the Save button [icon].

> Note: Search for information in existing records, before you enter new data. This prevents duplicate entries in the database. You can select the Display Claimant Name in MDI check box on the General System Parameter Setup window: System Settings tab to view the Claimant Name along with LOB and Claim Number in the navigation tree.

Tips

To Find Vehicle Claims History for a Unit

You can view or print all the claim information associated with a vehicle.

1.   Search for the vehicle accident claim in which the vehicle was involved.

The Vehicle Accident Claims window opens and a Vehicle Accident link displays under Document in the left navigation tree.

2. From the left navigation tree, under Vehicle Accident Claim node, select the Unit link.

   The Unit Involved window opens.

3. In the Vehicle ID field, select the search button and search for the vehicle you want to view a history for.

4. Select Claim History.

   The Claim Involvement History window opens.

Property Claims

Property Claims

Use the Property Claims window to enter detailed information about the claims related to property damages and liability. The Property Claims module enables you to add, edit, delete property claim information efficiently.

You can associate only one property per claim . To attach multiple properties to an event you must create multiple property claims.

Property Claims

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You can associate only one property per claim . To attach multiple properties to an event you must create multiple property claims.

To Enter a Property claim

1. From the main menu, select Document.
   The Document menu opens.

2. From the Document menu, choose Property Claim.
   The Property Claim window opens and a Claims node displays in the navigation tree.

3. Select and complete the fields in the Claim Info tab , as shown below.

Event Number	Enter the event number.

   - If you open the Property Claim window from the Event window, it displays the event number automatically.

     - If you open the Property Claim window directly, RISKMASTER will create a new event and add the event number to this field when you save the claim.

Claim Number	Enter a unique identifying number for the claim or leave blank and RISKMASTER will generate a claim number when you save.
Claim Type	Enter the code that best describes the claim or select the [icon] button to select from the Code Selection window.
Department	Enter the department, the individual or equipment involved in the event or select the [icon] button to select from the Org Hierarchy window.
Instr	Select the [icon] button to display special claim instructions for the department you entered.
Claim Status	Enter the code that best describes the claim status, select the [icon] button to select from the Code Selection window.
Date Closed	For a closed claim, displays when the claim was closed.
Close Method	When you close a claim, enter the code that best describes how the claim was closed or select the [icon] button to select from the Code Selection window.
Date of Event	Enter the date on which the event occurred or select the [icon] button to select from a calendar.

> Note: The Date of Event cannot be a future date. The Date of Claim and Time of Claim must not be earlier than Date of Event and Time of Event.

Time of Event	Enter the time when the event occurred.

> Note: You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.

Date of Claim	Enter the date on which your organization learned of the claim or select the ⊞ button to select from a calendar.
Time of Claim	Enter the time when your organization was informed of the claim.
Event Date Rptd.	Enter date on which the event was reported or select the ⊞ button to select from a calendar.

> Note: The Event Date Reported and Time Reported must be after the Date of Event and Time of Event.

Event Time Rptd	Enter the time when the event was reported.
Claim Date Rptd.	Enter the date when claim was reported or select the ⊞ button to select from a calendar.
Est. Collect	Enter the dollar amount that you expect to collect on this claim.
File Number	Enter any special identification number that your organization uses such as the box number or the insurance company's case number.
Policy Name	Enter a policy name that you want to attach to the claim or select the ⋯ button to select from the Policies window.

> When Policy Management System is active:

This field is required.

RISKMASTER displays all policies that meet the criteria based on the claim's Department, Claim Type, Effective Dates, Policy Status, and Trigger Method. You can attach a policy to a claim only when it fulfills the five filters.

> When Policy Management System is not active:

In Utilities, on the General Parameters Setup window, if you selected the "Autoselect Policy on Claim" check box, then a policy is selected on the claim automatically when the claim is saved.

Open	Select to open the Policy Maintenance window for the policy attached to the claim.
Service Code	Enter the code that best describes who is responsible for processing the claim or select the 🔍 button to select from the Code Selection window.

Payments Frozen	Select the check box to stop all payments on this claim.
	Note: The claim remains open but no payments are made until you clear this check box. You can only use this check box if you have the appropriate permissions.
LSS Claim	Select the check box if you want the claim to be sent to Legal Solution Suite (LSS).
Currency Type	Enter the currency type or select the search button 🔍 to select from the Code Selection window.
	Note: By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.
Catastrophe Type	Select the button to select the required catastrophe type associated with the claim.
	Note : The catastrophe can be of various types
	• Death
	•Ice
	•Earthquake
	•Multiple Vehicle Accident
	•Fire
	• Theft
	•Flood
	• Tornado
	•Hail
	•Workers Compensation Accident
	•Hurricane
	• Windstorm
	Note: From the Catastrophe Type field when you select a type of catastrophe, the Catastrophes window opens and lists all the catastrophes present in database based on chosen type and that meet the criteria (Event Date must lie between Loss Start Date and Loss End Date). Select 'Yes' and then choose a catastrophe record. The Catastrophe No. of the selected record displays in the Catastrophe Number field.
Catastrophe Number	Displays the number of the catastrophe record attached to the claim.
	Note: The number displays based on selection made in Catastrophe Type field.

4.   Select and complete the fields in the Event Detail tab , as shown below.

Location Address	Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.
County of Injury	Enter the county where the event occurred.
Location Description	Enter a description for the location where the event occurred or select the ![icon] button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description and then select OK.
Authority Contacted	Enter the person who was informed of the event, or select the ![icon] button to open the Standard Entity Search window and search for the authority contacted.
Event On Premise	Select the check box if the event occurred,

- on your organization's property (if you are self-insured).

- on the insured organization's property (if you are a TPA).

Primary Location	Enter the code that best describes the exact location where the event occurred or select the ![icon] button to select from the Code Selection window.
Location Type	Enter the code that best describes the location type where the event occurred or select the ![icon] button to select from the Code Selection window.
Cause Code	Enter the code that best describes the event cause or select the ![icon] button to select from the Code Selection window.
Number of Injuries	Enter the number of persons injured as result of the event.
Number of Fatalities	Enter the number of deaths that resulted from the event.
Event Description	Enter a description for the event or select the ![icon] button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description and then select OK.

6. Select and complete the fields in the Property Info tab, as shown below.

Use the Property Info tab to add a property to a claim. You can add only one property to one claim. If you need to attach multiple properties to an event, you need to create multiple claims.

When you select a property from the database, this tab is automatically populated. You can modify and save the property claim. However the property entity in the database is not changed when you make changes on this tab.

If you use the Policy Management System and the 'Filter Property for Selected Policy' check box is selected in Utilities, when you modify the policy on the claim, the Property Info tab will be cleared.

6.

Property ID	Select the Search button to select a property from the database.
	If you do not have Policy Management System turned on:
	There is no validation for properties based on Policy. You can select any property from the database.
	Once you select a property, the fields on this tab, the COPE tab, and the Optional COPE tab, are automatically populated and the Schedule tab is blank.
	If you have the Policy Management System turned on:
	• If in Utilities, on the Line of Business Parameters window, Claim Options tab, the 'Filter Property for Selected Policy' check box selected, then you can select a property on this tab based on the policy you selected on the Claim Info tab.
	If the property you want to select is not on the list you will need to add the property to the policy before you can create the property claim.
	Once you select a property, the fields on this tab, the COPE tab, the Optional COPE tab, and the Schedule tab are automatically populated.
	• If in Utilities, on the Line of Business Parameters window, Claim Options tab, the 'Filter Property for Selected Policy' check box is **not** selected, there is no validation for properties based on Policy.
	You can select any property from the database. Once you select a property, the fields on this tab, the COPE tab, and the Optional COPE tab, are automatically populated and the Schedule tab is blank.
	In this case the adjuster is responsible to verify coverage.
Description	Enter a brief description about the property.
Address	Enter the address of the property. Enter the City, State and Zip in the appropriate fields.
Territory Code	Enter the territory code of the property or select the button to select from the Code Selection window.
Category Code	Enter the category code of the property or select the button to select from the Code Selection window.
Appraised Value	Enter the appraised value of the property in dollars.
Appraised Date	Enter the date when the value of the property is appraised or select the button to select from the calendar.
Appraisal Source	Enter the source of appraisal of the property or select the button to select from the Code Selection window.
Land Value	Enter the land value of the property in dollars.

Replacement Value	Enter the replacement value of the property.
Property Claim History	Select the button to open the Property Claim History window and display the list of claims that have been filed for this property in the past. The fields displayed will be:

- Claim Number

- Claim Date

- Property ID

- Property Description

- Property Address, City, State, ZIP

7.

8. Select and complete the fields in the COPE Data tab , as shown below.

When you select a property from the database on the Property Info tab, the COPE Data tab is automatically populated. You can modify and save the data on this tab. However the property entity in the database is not changed when you make changes on this tab.

If you use the Policy Management System and the 'Filter Property for Selected Policy' checkbox is selected in Utilities, when you modify the policy on the claim, this tab will be cleared.

Class of Construction	Enter the property construction class.
Year of Construction	Enter the year when the property was constructed.
Square Footage	Enter the square footage of the constructed property.
No. of Stories	Enter the total number of stories build on the property.
Avg. Story Height	Enter the average height of a story.
Wall Construction	Enter the wall construction code of the property or select the button to select it from the Code Selection window.
Roof Construction	Enter the roof construction code of the property or select the button to select it from the Code Selection window.
Heating System	Enter the code for heating system of the property or select the button to select it from the Code Selection window.
Cooling System	Enter the code for cooling system of the property or select the button to select it from the Code Selection window.
Fire Alarm	Enter the code for fire alarm or select the button to select it from the Code Selection window.
Sprinklers	Enter the code for sprinkler system or select the button to select it from the Code Selection window.
Entry Alarm	Enter the code for entry alarm or select the button to select it from the Code Selection window.

    Roof Anchoring   Enter the code for roof anchoring or select the [icon] button to select it from the Code Selection window.

    Strength of Glass   Enter the code for strength of glass or select the [icon] button to select it from the Code Selection window.

9.   Select and complete the fields in the Optional COPE Data tab , as shown below.

When you select a property from the database on the Property Info tab, the Optional COPE Data tab is automatically populated. You can modify and save the data on this tab. However the property entity in the database is not changed when you make changes on this tab.

If you use the Policy Management System and the 'Filter Property for Selected Policy' checkbox is selected in Utilities, when you modify the policy on the claim, this tab will be cleared.

    Plot Plans   Enter the plan for the plot or select the [icon] button to select it from the Code Selection window.

    Flood Zone   Enter the flood zone certification details of the property or select the [icon] button to select it from the Code Selection window.

    EarthQuake Zone   Enter the earthquake zone information of the property or select the [icon] button to select it from the Code Selection window.

    GPS Altitude   Enter the Global Positioning System altitude of the property.

    GPS Latitude   Enter the Global Positioning System latitude of the property.

    GPS Longitude   Enter the Global Positioning System longitude of the property.

10.   Select and complete the fields in the Schedule tab , as shown below.

    Schedule Data

The Schedule tab displays the list of scheduled property items on a policy attached to the Property claim.

The Schedule tab is populated only if the Policy Management is activated for Property Claims and the 'Filter Property For Selected Policy' checkbox is selected in Utilities.

When you create a property you can schedule items within the property. The schedule is created on the property/policy entity. It only shows up on this tab if a policy is attached and it has scheduled items.

You cannot make changes to items on this tab.

his tab is available only if you have purchased the Policy Management module. This tab will appear blank unless there is a policy attached to the claim and the policy contains scheduled property items. .

    Schedule Name   Displays the list of units attached to the property.

    Amount   Displays the cost of units attached to the property.

11.   From the toolbar, select the Save button [icon].

12.   To add adjuster information, from the navigation tree, select Adjuster under the General claim node and complete the Adjuster window.

13.   To enter litigation information, from the navigation tree, select Litigation under the General claim node and complete the Litigation window.

14.   To enter OSHA information, from the navigation tree, select OSHA under the General claim node and complete the OSHA Information window.

15.   To add claimant information, from the navigation tree, select Claimant under the General claim node and complete the Claimant window.

16.　　To add defendant information, from the navigation tree, select Defendant under the General claim node and complete the Defendant window.

17.　　To add financial information, from the navigation tree, select Financial under the General claim node and complete the Reserves window , as shown below .

Reserve	Displays the reserve categories your organization uses.
	Note: To edit a reserve, select the reserve. This opens the Reserve for claim window.
Balance	Displays the reserve balance for each reserve category.
Paid	Displays the payments that you have entered for claim or claimant.
	Note: When you enter a payment, you have to select a Transaction Type code to determine the reserve category.
Collections	Displays any income related to the claim for each reserve category.
	Note: Recoveries or subrogation are also Collections.
Incurred	Displays the balance (plus payments less collections) for each reserve category.
Status	Displays the status of the reserve.
Payment History	Select to open the Payment History for claim window.
Time and Expense	Select to open the Time and Expense window.
	Note: You can only see this button if you activated the Time and Expense module in RISKMASTER Utilities .
Add Payment	Select to open the Funds Management window.
Add Collection	Select to open the Funds Management window.
Schedule Checks	Select to open the Schedule Automatic Check Processing window.
Back to Claim	Select to return to the claims window.
	Note: When you navigate through the Search > Funds > on the Funds window, from the tool bar, select Back To Financials button; you are able to view Back To Claim button.

18.　　If your organization defined Supplemental data, complete the Supplemental tab.

19.　　From the toolbar, select the Save button 　.

Note: Search for information in existing records, before you enter new data. This prevents duplicate entries in the database. You can select the Display Claimant Name in MDI check box on the General System Parameter Setup window: System Settings tab to view the Claimant Name along with LOB and Claim Number in the navigation tree.

Additional Claims Information

To Add Persons Involved

1. Search for the claim or event to which you want to add Persons Involved Information.
2. From the navigation tree, under the required claim node select the Persons Involved link.
   A Lookup results window opens and displays the list of Persons Involved .

3. From the Lookup Results window, select the required Persons Involved .

4. To add a Persons Involved , right-click the claimant link in the left navigation tree and select Add New.
   The Persons Involved t window opens.

5. To associate an existing entity, select the Add Existing button, next to the Persons Involved type that you want.
   The Standard Entity Search window opens.

6. Complete the fields on the Standard Entity Search to search for the required entity.
   The Search Results window opens and displays all entities that match your search criteria.

7. To add a new Persons Involved, next to the appropriate Persons Involved, select the Add New button.
   The appropriate window opens based on the Persons Involved type that you selected.

8. Complete the fields on the window.

9. From the toolbar, select the Save button .

To Add Claimant Information

1. Search for the claim to which you want to add claimants Information.
2. From the navigation tree, under the required claim node select the Claimants link.
   A Lookup results window opens and displays the list of claimants.

3. From the Lookup Results window, select the required claimant.

4. To add a claimant, right-click the claimant link in the left navigation tree and select Add New.
   The Claimant window opens.

5. Select and complete the fields on the Claimant window: Claimant Info tab, as shown below.

Claimant Last Name	Enter the claimant's last name.
	You can select the button to open the Standard Entity Search window and search for a claimant.
	You can select the search button to open a list of claimants associated with the claim.
	When you search for a claimant, RISKMASTER automatically updates the other fields on the tab.
	Before you enter new data, search for the claimant in existing records. This prevents duplicate entries in the database .
First Name	Enter claimant's first name.
Address	Enter the claimant's address. Enter the City, State, Zip, and Country in the appropriate fields.
Office Phone	Enter the claimant's office phone number.

Home Phone	Enter the claimant's home phone number.
Fax	Enter the claimant's fax number.
Primary Claimant	If there are multiple claimants for this claim, select the check box if you want this claimant to be the primary claimant.
Claimant Type	Enter the code that best describes the claimant type or select the search button to select from the Code Selection window.
Sex	Enter the code that best describes the claimant's gender or select the search button to select from the Codes Selection window.
Date of Birth	Enter the claimant's date of birth.
SOL Date	Enter the Statute of Limitations date.
	The Statute of Limitations states the time limit set by law during which a person must bring legal action on a case.
Insurer	Enter the claimant's insurance provider or select the ··· button to open the Standard Entity Search window and search for the insurer.
Injury Desc	Enter a description of the claimant's injuries or select the ··· button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.
Damage Desc	Enter a description of the damages the claimant suffered or select the ··· button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.
Email Type	Select the button to open code selection window and select the type of email account the claimant is using.
Email	Enter the email address of the claimant
Claim History	Select the button to open the Claim Involvement History window.
Back to Claimant List	Select the button to open the Claimants for Claim window.

6. Select and complete the fields on the Claimant window: Claimant Attorney tab, as shown below.

Attorney Last Name   Enter the attorney's last name.

You can select the ▪▪▪ button to open the Standard Entity Search window and search for an attorney.

You can select the search button to open a list of attorneys associated with the claim.

When you search for an attorney, RISKMASTER automatically updates the other fields on the tab.

Before you enter new data, search for the claimant in existing records. This prevents duplicate entries in the database.

First Name   Enter the attorney's first name.

Firm Name   Enter the name of the firm with which the attorney is associated or select the ▪▪▪ button to open the Standard Entity Search window and search for the firm.

Title   Enter the attorney's title, if any.

Address   Enter the attorney's address. Enter the City, State, Zip, and Country in the appropriate fields.

Office Phone   Enter the attorney's office phone number.

Home Phone   Enter the attorney's home phone number.

Fax   Enter the attorney's fax number.

Claim History   Select the button to open the Claim Involvement History window.

Back to Claimant List   Select the button to open the Claimants for Claim window.

7.   From the toolbar, select the Save button ▦.

8.   From the toolbar, select the Enhanced Notes ▨ button to open the Enhanced Notes for the associated parent claim record.

To Add Adjuster Information

1.   Search for the claim to which you want to add adjuster information.
2.   From the left navigation tree, select Adjuster link under the required claim node.

The Adjuster window opens.

3.   Complete the fields on the Adjuster window: Claim Adjuster Information tab , as shown below .

Adjusters Last Name   Enter the adjuster's last name or select the ▪▪▪ button to open the Standard Entity Search window and search for a adjuster.

When you search for an adjuster, RISKMASTER automatically updates the other fields on the tab.

Before you enter new data, search for the adjuster in existing records. This prevents duplicate entries in the database.

First Name   Enter adjuster's first name.

Middle Name   Enter adjuster's middle name.

Address   Enter the adjuster's address. Enter the City, State, Zip, and Country in the appropriate fields.

RISKMASTER Login   Enter the user name or select the [🔍] button to select from the System Users window.

Current Adjuster   Select the check box if you want this adjuster to work on this claim.

Title   Enter the adjuster's title.

Office Phone   Enter the adjuster's office phone number.

Alt. Phone   Enter the adjuster's home phone number.

Fax   Enter the adjuster's fax number.

Dated Text   Select the button to open the Adjuster Dated Text window .

Back to Claim   Select to open the Claim window.

4. To add adjuster dated text, from the left navigation tree, under the required adjuster right click the Dated Text link and from pop up select Add New.
   The Adjuster Dated Text window opens.

5. Complete the fields on the Adjuster Dated Text window , as shown below .

   Entered by User   Enter your name, if you are entering comments.

   Date Entered   Enter the date on which you are entering the comments.

   Time Entered   Enter the time when you are entering the comments.

   You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.

   Dated Text Type

   Enter the code that best categorizes your comments or select the [🔍] button to select from the Code Selection window.

Dated Text	Enter your comments related to the adjuster record or select the *** button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.
Email Type	Select the button to open code selection window and select the type of email account the adjuster is using.
Email	Enter the email address of the adjuster.
Back To Adjuster	Select to open the Adjuster window.

6. From the toolbar, select the Save button.

7. From the toolbar, select the Enhanced Notes button to open the Enhanced Notes for the associated parent claim record.

Tips

To Add Defendant Information

1. Search for the claim to which you want to add defendants Information.
2. From the navigation tree, under the required claim node select the Defendants link.

   A Lookup results window opens and displays the list of defendants .

3. From the Lookup Results window, select the required Defendants .

4. To add a claimant, right-click the Defendants link in the left navigation tree and select Add New.
5. Select and complete the fields on the Defendant Info tab , as shown below.

Defendant Last Name	Enter the defendant's last name.
	You can select the *** button to open the Standard Entity Search window and search for a Defendant.
	When you search for a defendant, RISKMASTER automatically updates the other fields on the tab.
	Before you enter new data, search for the Defendant in existing records. This prevents duplicate entries in the database.
First Name	Enter defendant's first name.
Address	Enter the defendant's address. Enter the City, State, Zip, and Country in the appropriate fields.
Office Phone	Enter the defendant's office phone number.
Home Phone	Enter the defendant's home phone number.

Fax	Enter the defendant's fax number.
Defendant Type	Enter the code that best describes the defendant type or select the [search icon] button to select from the Code Selection window.
Insurer	Enter the claimant's insurance provider or select the [...] button to open the Standard Entity Search window and search for the insurer.
Policy Number	Enter the insurance policy provider's number.
Policy Type	Enter the code that best describes the policy type or select the [search icon] button to select from the Code Selection window.
Policy Limit	Enter the dollar amount limit on policy coverage .
Expiration Date	Enter the date on which the coverage expires or select the [calendar icon] button to select from the calendar.
Claim History	Select the button to open the Claim Involvement History window.

6.

7. Select and complete the fields on the Defendant Attorney tab , as shown below.

Attorney Last Name	Enter the attorney's last name. You can select the [...] button to open the Standard Entity Search window and search for an attorney You can select the search button to open a list of attorneys associated with the claim . When you search for an attorney, RISKMASTER automatically updates the other fields on the tab. Note: Before you enter new data, search for the claimant in existing records. This prevents duplicate entries in the database.
First Name	Enter the attorney's first name.
Middle Name	Enter the attorney's middle name.
Firm Name	Enter the name of the firm with which the attorney is associated or select the [...] button to open the Standard Entity Search window and search for the firm.
Title	Enter the attorney's title, if any.

Address	Enter the attorney's address. Enter the City, State, Zip, and Country in the appropriate fields.
EMail Type	Enter the email type of the defendant attorney.
EMail	Enter the email address of the defendant attorney.
Office Phone	Enter the attorney's office phone number.
Home Phone	Enter the attorney's home phone number.
Fax	Enter the attorney's fax number.
Claim History	Select the button to open the Claim Involvement History window.
Back to Claim	Select the button to open the Claim window.

8. From the toolbar, select the Save button .

9. From the toolbar, select the Enhanced Notes button to open the Enhanced Notes for the associated parent claim record.

To Add Litigation Information

1. Search for the claim to which you want to add Litigation Information.
2. From the left navigation tree, under the required claim node, select Litigation link.
   A Lookup results window opens.

3. From the Lookup results window, select the required Litigation.
   The Litigation window opens.

4. Complete the fields on the Litigation Info tab, as shown below.

Docket Number	Enter the identification number assigned by the court to the filed lawsuit.
Suit Date	Enter the date on which the lawsuit was filed or select the button to select from calender.
Court Date	Enter the date for the next court hearing or select the button to select from calender.
Venue State	Enter the state of jurisdiction for the claim or select the button to select from the Code Selection window.
County	Enter the county where the lawsuit is filed.
Litigation Type	Enter the code that best describes the litigation type or select the button to select from the Code Selection window.

Litigation Status

Enter the code that best describes the litigation status or select the [icon] button to select from the Codes Selection window.

Demand/Allegations

Select the [icon] button to open the RISKMASTER Editor and enter the specific allegations made in the lawsuit, the issues under litigation, and the demands made by the claimant , usually in terms of a financial amount.

Judge Last Name

Enter the judge's last name.

You can select the [icon] button to open the Standard Entity Search window and search for the judge.

Before you enter new data, search for the judge in existing records. This prevents duplicate entries in the database .

First Name

Enter the judge's first name.

Experts

Back to Claim

Select to open Claim window.

Address

Enter the court address. Enter the City, State, Zip, and Country in the appropriate fields.

5. Select and complete the fields on the Attorney Information tab, as shown below.

Attorney Last Name

Enter the attorney's last name or select the [icon] button to open the Standard Entity Search window and search for an attorney.

When you search for an attorney, RISKMASTER automatically updates the other fields on the tab.

Before you enter new data, search for the claimant in existing records. This prevents duplicate entries in the database.

First Name

Enter attorney's first name.

Address

Enter the attorney's address. Enter the City, State, Zip, and Country in the appropriate fields.

Attorney Firm

Enter the name of the firm with which the attorney is associated or select the [icon] button to open the Standard Entity Search window and search for the firm.

Office Phone

Enter the attorney's office phone number.

Home Phone

Enter the attorney's home phone number.

Email Type

Select the 🔍 button to open code selection window and select the type of email account the litigation attorney is using.

Email

Enter the email address of the litigation attorney

Fax

Enter the attorney's fax number.

6. Select the Expert button.
   The Expert Witness window opens.

7. Complete the fields on the Expert Witness window , as shown below .

Expert Last Name

Enter the witness's last name or select the ⋯ button to open the Standard Entity Search window and search for a witness.

When you search for an witness, RISKMASTER automatically updates the other fields on the tab.

Before you enter new data, search for the claimant in existing records. This prevents duplicate entries in the database.

First Name

Enter witness's first name.

Middle Name

Enter witness's middle name,if any.

Address

Enter the witness's address. Enter the City, State, Zip, and Country in the appropriate fields.

Witness Type

Enter the code that best describes the witness type or select the search button to open the Code Selection window.

Office Phone

Enter the witness's office phone number.

Home Phone

Enter the witness's home phone number.

Fax

Enter the witness's fax number.

Title

Enter the witness's title.

Rate

Enter the rate the expert witness charges for services.

Notes

Enter notes about the expert witness or select the 📝 button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description and then select OK.

Specialty

Enter notes about the expert witness's specialty or select the button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description and then select OK.

Case Description

Enter a description of the lawsuit or select the button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.

Back to Litigation   Select to open the Litigation window.

8.   From the toolbar, select the Save button .

9.   From the toolbar, select the Enhanced Notes button to open the Enhanced Notes for the associated parent claim record.

To Get a Quick Summary

You can generate quick summaries and executive summaries In RISKMASTER. Use a quick summary to review details about events and claims on a single window. You can configure an executive summary to contain details about claims, financials, diaries, and notes. However, you cannot change the configuration of a quick summary.

To Get a Quick Summary

1.   Search for the claim or event for which you want to generate a quick summary.

2.   From the RISKMASTER toolbar, select the Quick Summary button .

The Quick Summary window opens.

3.   From the left tab, select the item for which you want to view details.

For example, under Event select Diaries to display the diaries associated with that event. The right frame displays the details.

To Submit Claim to ISO

1.   Search for the claim which you want to submit to Insurance Services Office (ISO).

> Note: The ISO Claim Submission button displays on the claim window only when on the Line of Business Parameter Setup window: Claim Options tab, the Use ISO Claim Submission check box is selected.

2. From the RISKMASTER toolbar, select the ISO button .

    The ISO Claim Submission window opens.
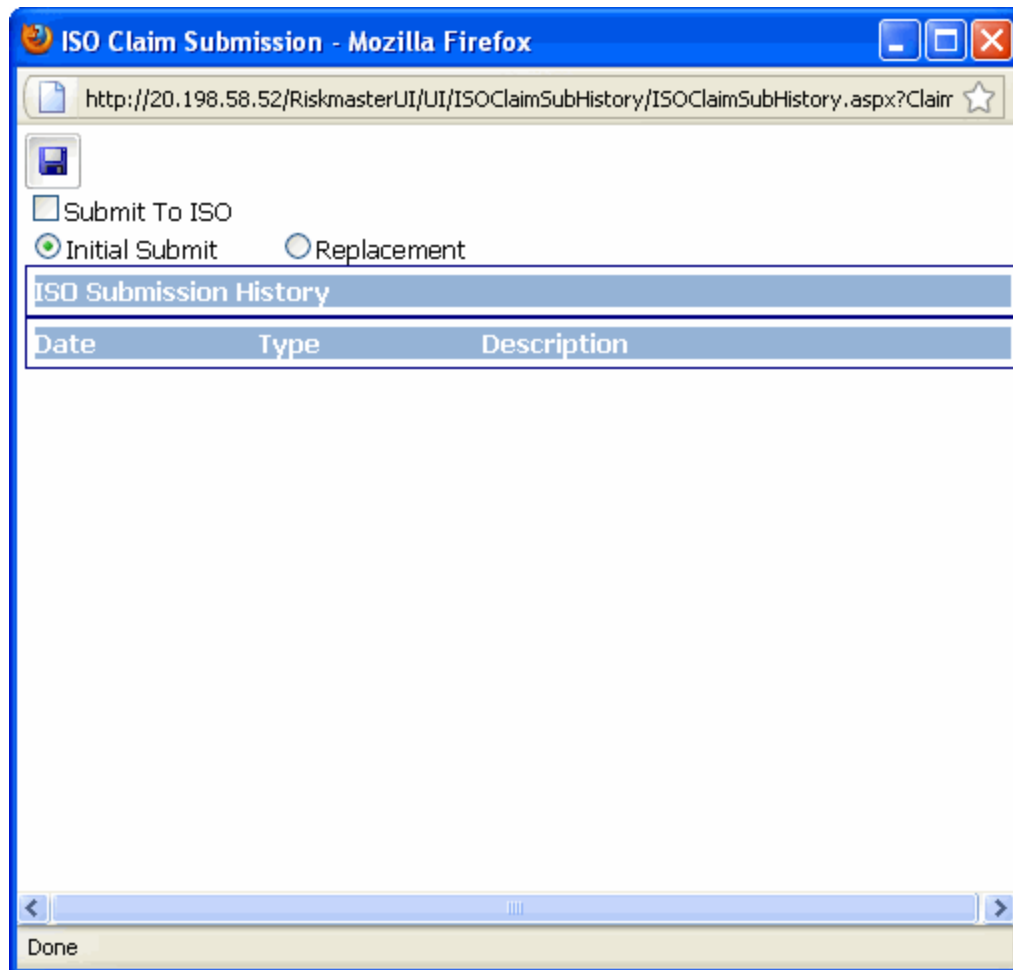
3. Select the Submit To ISO check box to submit the claim to ISO and do one of the following:

- Select the **Initial Submit** option, if you are submitting this claim to ISO for the first time..

- Select the **Replacement** option, if you are replacing an initially submitted claim.

4. Select the [ ] button.

To Setup Backup Withholding

1. Search and open the entity record you want to setup backup withholding for.

2. From the toolbar select the [ ] button.
   The Backup Withholding window opens.

3. Select the Enable Backup Withholding check box to activate backup withholding feature for the selected entity record.
4. In the Percentage field, enter the amount of payment to be reserved for selected entity or payee.
5. In the Recipient field, select the Ellipses button to open the Standard Entity Search window to select the entity that receives the withholding payment.
6. Select the Voucher Payment check box to set payment as check or voucher.

    Note: The payment will be processed as a check however will not print a physical check from RMX.

7. Select the Save button to save changes.

Activity Log Overview

maintains an activity log that lets you automatically capture changes to claims. You can configure (enable/disable) the activity log through Utilities.

You can configure the activity log to record changes to:

- Claim

- Event/Person Involved Claimant

- Funds

- Funds Trans Split

- Reserves

- Adjuster

- Defendant

- Subrogation

- Property

- Unit

- Arbitration

- Auto Funds

- Claim Status history

- Supplemental

- Policy

- ▪ Policy Coverage

- ▪ Salvage

- ▪ Litigation

To view the activity log you must have Module level access permissions for claim activity log setup in Security Management System.

To View Claim Activity Log

While working on a particular claim, you can view all the changes done by different users on the claim or event and related modules. You can view the changes based on various actions that are taken on a claim pertinent to the following

Reserve Add/Hold/Reject/Approve, Litigation, Policy,Claim,Claim Status, Transaction Action for split, Payment Action (Payment, void, Collection, offset), Payment transaction rejected/Approved,Adjuster/Claimant/Defendants etc

1. Search and open the claim for which you want to view the activity log.

2. From the toolbar, select the button.
   The Claim Activity Log window opens. The various changes done on the claim are displayed in this window based on the activity log configuration in Utilities.

Financial Detail History

For Carrier Claims

1. From the Claim window, select the button.
   For Corporate Claims

2. From the reserves/ financials window, select the Financial Detail History button.
   The Financial Detail History window opens.

3. Select the Level field select the level for which you want to see the financials detail.

Date/Time	Displays the date and time of the transaction
Trans Type	Displays the transaction type
Policy Name	Displays the policy name of the policy associated with transaction
Unit	Displays the unit associated with the policy for the transaction
Coverage type	Displays the coverage type of the policy
Cause/ type of Loss	Displays the cause/type of loss os the policy associated with transaction
Financial type	Displays the financial type of the policy associated
Claimant	Displays the claimant associated with the transaction
Amount (USD)	Displays the amount of the transaction
Amount in Claim currency	Displays the amount in the selected claim currency

4. Select the Back button.

Carrier Claims

Carrier Claims Overview

Carrier Claims functionality is included in RISKMASTER X to facilitate carrier claims. To enable this functionality, select the 'Use Carrier Claims' check box on the Carrier Claim Settings tab in Utilities. Once you select this option only General Claims and Worker's Compensation lines of business will be available. Property Claims, Vehicle Accident Claims, and Non-occupational Claims will be disabled.

Using Carrier Claims functionality you can add multiple policies to claims and handle reserves at a policy coverage level. This feature involves several changes to the way   handles financials. You should use the financials component of this functionality only if you are a carrier and not a self-insured/self-administered organization. **Carrier fields are not reportable in Business Analytics**.

You can add Subrogation and Demand/Offer details to claims, and enter unit statistical reporting information for worker's compensation claims.

You can also use the Code Relationship window to map between claim types and loss components.

The fields related specifically to this functionality are not available on quick summary.

To Activate New Carrier Claims Features

By default, new carrier claims features are disabled in . To enable new carrier claims features, you need to obtain an activation code from RISKMASTER Technical Support or your CSC Project Manager.

You must enable new carrier claims features as shown in this section to attach multiple policies to claims and to handle reserves at policy coverage level.

You do not need to enable new carrier claims features to get unit statistical reports or to add subrogation/demand offer data to claims.

To Turn on the Carrier Claims setting

1.   From the Utilities menu, select System Parameters > General System Parameters Setup.
     The General System Parameter Setup window opens.

2.   Select the Carrier Claim Settings tab.
3.   Select the Use Carrier Claims check box.
     An activation code required window opens.

4.   Enter the activation code.
5.   Select OK.

To Enter Employee Involved Information

1.   Search for the claim to which you want to add employee involved information.
2.   From the left navigation tree, expand the required claim node.
3.   Right click the Persons Involved link and select Employee.
     The Employee Involved window opens.

4.   Select and complete the fields on the Employee Involved window: Employee tab,as shown below.

Employee Number	Enter a unique identifying number for the employee.
Last Name	Enter the employee's last name.
First Name	Enter the employee's first name.
Middle Name	Enter the employee's middle name.
Also Known As	Enter any other names the employee is known by.
Initials	Enter the employee's initials.
Address	Enter the employee's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Soc.Sec No.	Enter the employee's social security number (SSN).
Date of Birth	Enter employee's date of birth.
Age	Enter employee's age.
Title	Enter the employee's official title, if any.
Office Phone	Enter the employee's office phone number.
Home Phone	Enter the employee's home number.
Fax	Enter the employee's fax number.
Sex	Enter the employee's gender or select the button to select from the Code Selection window.
Marital Status	Enter the code that describes the employee's marital status or select the button to select from the Code Selection window.
Cost Center	Enter the code that best describes the employee's cost center or select the button to select from the Code Selection window.

5.   Complete the fields on the Employee Involved window: Employment Info tab, as shown below.

Date Hired	Enter the date on which the employee was hired or select the button to select from a calendar.
Termination Date	If the employee no longer works for your organization, enter the employee's last work day or select the button to select from a calendar.
Position Code	Enter the code that best describes the employees job or select the button to select from the Code Selection window.
Active	Select the check box if the employee is currently working in your organization.
Department	Enter the department the employee worked for or select the button to select from the Org Hierarchy window.
Full Time Employee	Select the check box if the employee works at least 40 hours per week.
Supervisor	Enter the supervisor's name or select the button to open the Standard Entity Search window and search for the employee's supervisor.
Exempt	Select the check box if the employee is a salaried employee.
Pay Type	Enter the code that indicates whether an employee is salaried or is paid hourly or select the button to select from the Code Selection window.
No. of Exemptions	Enter the number of exemptions the employee claims on salary for tax purposes.
Pay Amount	If the employee is salaried, enter the employee's salary.
Hired In Jurisdiction	Select the check box if the employee was hired in the same OSHA jurisdiction as the one you selected on the Employee tab.
Time Workday Began	Enter the time when the employee started working every day.
Hours Per Week	Enter the employee's regularly scheduled number of work hours per week.
Hourly Rate	If the employee is paid hourly, enter the employee's hourly pay.
Weekly Rate	RISKMASTER calculates the employee's weekly rate based on the hourly rate and the number of hours worked in a week.
Monthly Rate	RISKMASTER calculates the employee's monthly rate based on the hourly rate and the number of hours worked in a week.

Daily Rate	Enter the employee's daily rate based on the number of hours worked in a day.
Daily Hours	Enter the number of hours employee works in a day.
Not Eligible for Disability Benefits	Select the check box if the employee is not eligible for disability benefits.
Disability Option	Enter the code that best describes the disability or select the button to select from the Code Selection window.
Collateral Sources	Enter the code that best describes the organization providing disability benefits, such as, Workers' Compensation Law, State Temporary Disability Benefit, or Private Disability plan or select the button to select from the Code Selection window.
Collateral Offset	Enter the weekly compensation received from a collateral source.
Work Week	Select the days of the week the employee works.

6. Complete the fields on the Employee Involved window: Employee Detail 1tab, as shown below.

Est. Len. of Disability	Enter the estimated number of days on disability.
	Note: This is calculated based on the First Day Restricted you entered on the Restricted Days window, the Estimated Release from Restriction. date and the work week.
Est. return To Work	Enter the estimated date on which the employee can return to work.
Regular Job at Time of Event	Select the check box if the employee was working on a task associated with the employee's regular job, when injured.
Date of Death	If the employee expired, enter the date on which the employee died or select the button to enter date from the calendar.
Disability Type	Enter the code that best describes the disability or select the button to select from the Code Selection window
Illness Type	Enter the code for the employee's illness type or select the button to select from the Code Selection window.
	Note: The field is active only when you select the Disability Type as Illness.
Injuries	Enter the code that best describes the injuries the employee sustained or select the button to select from the Code Selection window.

Note: The field is active only when you select the Disability Type as Injury.

Body Parts	Enter the code that best describes the limbs, bones, or organs involved in the injury or select the 🔍 button to select from the Code Selection window.
Hospital	Select the ••• button to open the Standard Entity Search window to search for and select the hospital where the employee was treated.

Note: To remove an existing hospital from the Hospital field, select the record and select ➡.

Physicians	Select the ••• button to open the Standard Entity Search window and select the physician who made the primary diagnosis.
OSHA Recordable	Select the check box if the employee is OSHA recordable.
Diagnosis	Enter the code that best describes the diagnosis or select the 🔍 button to select from the Code Selection window.
OSHA Accident Description	Select the 📝 button to open the RISKMASTER Editor. Enter the OSHA accident description and then select OK.
Treatment	Enter the code that best describes the treatment for the injury or illness or select the 🔍 button to select from the Code Selection window.

7. Complete the fields on the Employee Involved window: Employee Detail 2 tab, as shown below.

license Number	Enter the employee's driving license number.
license Type	Enter the code that best describes the driving license type or select the 🔍 button to select from the Code Selection window.
license Jurisdiction	Enter the jurisdiction in which the driving license is valid or select the 🔍 button to select from the States window.
Expiration Date	Enter the date on which the driving license expires or select the 📅 button to select from the calendar.
Restrictions	Enter the code that best describes the restrictions that apply on the driving license or select the 🔍 button to select from the Code Selection window.
NCCI Class	Enter the code for the job class as determined by the National Council of Compensation Insurers or select the 🔍 button to select from the Code Selection window.

Date Last Verified	Enter the date on which the authorities verified the license for validity or select the 🗓 button to enter date from the calendar.
Insurable	Select the check box if the employee is insured .
Lost Consciousness	Select the check box if the employee lost consciousness as a result of the injury.
Work Permit #	Enter the employee's work permit number.
Work Permit Date	Enter the date on which the employee was issued the work permit or select the 🗓 button to enter date from the calendar.
Job Classification	Enter the code for the job classification or select the 🔍 button to select the code from the Code Selection window.

8. Complete the fields on the Employee Involved window: Injury Info tab, as shown below.

Cause Of Injury	Enter the code that best describes the correct cause of injury or select the 🔍 button to select from the Code Selection window.
PreExisting Condition	Enter the code that best describes that any medical condition(s) the injured party may have had prior to the accident or select the 🔍 button to select from the Code Selection window.
Activity When Injured	Select the 📝 button to open the RISKMASTER Editor and enter a description of what the injured person was doing at the time of the accident and the consequent injury and then select the OK button.
Symptoms Description	Select the 📝 button to open the RISKMASTER Editor and enter the symptoms of the injury or the medical condition and then select the OK button.
Where Injury Taken	Select the 📝 button to open the RISKMASTER Editor and enter a description of location where the injured was taken and then select the OK button.
Prognosis	Select the 📝 button to open the RISKMASTER Editor and enter a brief prognosis of the injury resulting from the incident and then select the OK button.
Injury Inconsistent w/ Police Rept	Deselect the check box to indicate the described injuries are consistent with the police report.
ER or Hospital Visit	Select the check box to indicate whether the injured party received treatment in a hospital's emergency room.

File Closing Date	Enter or select the ▦ button to select the date on which all the designated treatments and/or tests for the injured party are completed.
Medications	Select the 📝 button to open the RISKMASTER Editor and enter the list of medications prescribed to the injured party by the physician, and any prescribed medications taken before the date of injury and then select the OK button.
	Note: You can enter multiple prescriptions. When the number of entries exceeds the viewable area, a vertical scroll bar enables you to scroll up and down through the entries.
Catastrophic Injury	Select the check box to indicate whether the loss is catastrophic or not.
Impairment	Select the check box to indicate whether there is impairment to the body parts.

9. From the toolbar, select the Save 💾 button.

To Work with Code Relationships

Note: The Code Relationships window is visible only when the Use Carrier Claims check box is selected on the General System Parameter Setup window: Carrier Claim Settings.

1. From the main menu, select Utilities.
    The Utilities menu opens.

2. From the Utilities menu, select Managers.
    The Managers menu opens.

3. From the Managers menu, select Code Relationships.
    The Code Relationships window opens.

4. Complete the fields on the Code Relationships window, as shown below.
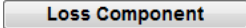
Relationship Type	From the drop down list select the relationship type you want to map.
Claim Type	Select the **Claim Type** button to select the claim type from the Code Selection window.
Loss Component	Select the **Loss Component** button to select the loss components from the Code Se
Available	From the list, select the claim type (s)/loss component (s) to save mapping.
Related	Display the claim type (s)/loss component (s) you selected.
>>	Select the button to add all the available claim types/loss components to the Related field.
>	Select the button to add the selected available claim type/loss components to the Related field.
<<	Select the button to remove all the claim types/loss components from the Related field.
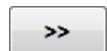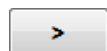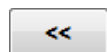
[<]	Select the button to remove the selected claim type/loss component from the Related field.
[save icon]	Select the save button to save the changes made to the window.

To Enter Unit Loss Information

1. Search for the claim to which you want to add vehicle loss information.
2. From the navigation tree, expand the required claim node.
3. Right click the Unit link and select Add New.
   The Unit Involved window opens.

4. Complete the fields on the Unit Involved window: Unit Information tab, as shown below.

Vehicle ID	Enter the unique identifying number your organization uses to identify the vehicle involved in the accident.
Vehicle Make	Enter the vehicle's manufacturer name.
Vehicle Model	Enter the vehicle's model name.
Vehicle Year	Enter the year in which the vehicle was manufactured.
Unit Type	Enter the code that best describes the vehicle type or select the search [🔍] button to select from the Code Selection window.
Department	Enter the department in-charge of the vehicle or select the search [🔍] button to select from the organizational hierarchy.
license Number	Enter the vehicle's license plate number.
State	Enter the state where the vehicle is registered or select the [🔍] button to select from the Code Selection window.
Damage	Select the [icon] button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description of the damages that occurred and then select the OK button.

5. Complete the fields on the Unit Involved window: Vehicle Loss Information tab, as shown below.

Insured	Select the check box if the vehicle is insured.
Drivable	Select the check box if the involved unit can still be safely driven.
Non Vehicle Damage	Select the check box to indicate whether property damage, other than a vehicle, occurred from the incident.
Estimated Damage	Enter an estimated amount of the damage done to the involved unit.

Owner	Select the Search button to go to the Parties Involved window to assign the owner of the involved unit. This button only becomes active after entry and saving of required fields.
Can Be Seen At	Select the button to open the comments window and enter the description of the directions and location of the damaged vehicle and then select the Save & Close button.
Date	Enter the date on which you can inspect the involved unit, at the location recorded in the Can Be Seen At field or select the button to enter date from the calendar.
Time	Enter the time at which you can inspect the involved unit, at the location recorded in the Can Be Seen At field.

6. Complete the fields on the Unit Involved window: <u>Other Insurance Information tab,</u> as shown below.

Other Insurance	Select the check box to indicate whether another party, not directly involved in the incident or claim, provides other insurance.
Policy Holder is Property Owner	Select the check box to indicate whether the policyholder on the other insurance is also the owner of the involved property.
PolicyHolder	Enter or select the button to enter the policyholder's full name concerning the other insurance coverage.
Company	Enter or select the button to enter the name of the insurer on the other insurance coverage.
Policy Number	Enter the policy number for the other insurance coverage.
Coverages	Select the button to open the comments window and enter the description of relevant coverages provided by the other insurance company and then select the Save & Close button.
Limits	Enter the relevant coverage limits provided by the other insurance company.

7. From the toolbar, select the Record Summary button to open the Record Summary window.

8. From the toolbar, select the Diary button to open the Create Diary window and create a new diary task.

9. From the toolbar, select the Attach Documents button to add new documents.

10. From the toolbar, select the Enhanced Notes button to open the Enhanced Notes for the associated parent claim record.

11. From the toolbar, select the Delete Record button to delete the existing record.

12. From the toolbar, select the Save button.

To Enter Property Loss Information

1. Search for the claim to which you want to add property loss information.
2. From the left navigation tree, expand the required claim node.
3. Right click the Property link and select Add New.
   The Property Loss window opens.

4. Complete the fields on the Property Loss window: Property Loss Information tab, as shown below.

Property ID	Select the ••• button to select a unique identification number for this property.
	Note: On the General System Parameter Setup window, System Settings tab, in the General Parameters section, if you selected the 'Autonumber Property ID (PIN)' check box, you can leave this field blank and RISKMASTER will generate a property ID when you save the record.
	If you did not select the Autonumber Property ID (PIN) check box, RISKMASTER will prompt you to enter a Property ID before you can save.
Insured	Select the check box if the property is insured.
Type Of Property	Enter the code that best describes the type of loss property or select the button to select from the Code Selection window.
Damage	Select the button to open the comments window and enter the description of the damage property and then select the Save & Close button.
Property Involved	Select the button to open the Property Type Codes window and select the code that best describes the type of property involved in the claim, such as Commercial Building, Commercial Equipment. Select the button to remove the selected property involved in the Property Involved field.
Can Be Seen At	Select the button to open the comments window and enter the description of the directions and location of the damaged property and then select the Save & Close button.
Estimated Damage	Enter an estimated dollar amount of damage sustained to the property.
Date	Enter the date the property is available for inspection or select the button to select from a calendar.
Time	Enter the time at which you can inspect the property.
	Note: You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.
Property Description	Select the button to open the comments window and enter the description of property and then select the Save & Close button.
Location Of Theft	Enter the code that best describes the property on which theft occurred or select the button to select from the Property Location Of Theft window.
Expense From Date	In cases where the property owner must acquire a temporary substitute or temporarily maintain a property while their property is under repair, enter the date when expenses will begin to be paid to the property owner.

Expense To Date	In cases where the property owner must acquire a temporary substitute or temporarily maintain a property while their property is under repair, enter the last date expenses will be paid to the property owner.
Owner	Enter or select the ••• button to assign an entity as the owner of the property.
Incendiary Fire	Select the check box if the fire was deliberately set.
Vacant	Select the check box if the property was vacant at the time of damage.
Under Construction	Select the check box if the property was under construction at the time of damage.

5. Complete the fields on the Property Loss window: Other Insurance Information tab, as shown below.

Other Insurance	Select the check box to indicate whether another party, not directly involved in the incident or claim, provides other insurance.
Policy Holder is Property Owner	Select the check box to indicate whether the policyholder on the other insurance is also the owner of the involved property.
PolicyHolder	Enter or select the ••• button to enter the policyholder's full name concerning the other insurance coverage.
Company	Enter or select the ••• button to enter the name of the insurer on the other insurance coverage.
Policy Number	Enter the policy number for the other insurance coverage.
Coverages	Select the button to open the comments window and enter the description of relevant coverages provided by the other insurance company and then select the Save & Close button.
Limits	Enter the relevant coverage limits provided by the other insurance company.

6. From the toolbar, select the Record Summary button to open the Record Summary window.

7. From the toolbar, select the Enhanced Notes button to open the Enhanced Notes for the associated parent claim record.

8. From the toolbar, select the Delete Record button to delete record.

9. From the toolbar, select the Save button.

Unit Statistical Reports for Workers Compensation

You can enter the following Unit Statistical reporting information for workers compensation claims:

- Fraudulent Claim Ind

- Method Of Settlement

- Reserve Type Code

- Managed Care Organization Typ

- Annuity Purchase Amt

- Total Gross Incurred

- Catastrophe Number

- Date Discl Form Rec

- Represented by Attorney

- Controverted/Disputed

- Lump Sum Indicator

- Previous WC

- Date

- Description

To Enter Unit Statistical Information for Workers Compensation Claims

1. Open the workers compensation claim you want to add Unit Statistical Information to.
2. Select the Unit Stat Detail tab.
3. Complete fields as shown below:

Field	Description
Fraudulent Claim Ind	
Settlement Method	Select a settlement method from the codes list
Reserve Type Code	Select the unit stat reserve type code from the codes list
Managed Care Organization Type	Select the Managed Care organization type code from the codes list
Annuity Purchase Amt	Enter the price paid by the insurer to purchase an annuity used to settle the workers compensation claim.
Total Gross Incurred	Enter the total dollar amount paid and the total reserve for the workers compensation claim.
Catastrophe Number	Enter the number used to link two or more claims to a catastrophic loss.
Date Discl Form Rec'd	Enter the date the insurance carrier received the signed disclosure form from the employees' attorney.
Represented by Attorney	Select the check box if the employee has an attorney or authorized representative.
Controverted/Disputed	Select the check box if the claim is or ever was disputed or contested for compensability and/or disability by the insurer.
Lump Sum Indicator	Select the check box if a single sum payment settled the claim.

Previous WC Claim	Select the check box if a previous workers compensation claim exists.
Date	The date of the previous workers compensation claim.
Description	The description of the previous workers compensation claim.

4.   From the toolbar, select Save.

To Set Up Unit Statistical Reports in RISKMASTER Utilities

1. From the Utilities menu, select System Parameters > General System Parameters Setup.
   The General System Parameter Setup window opens.
2. Select the Carrier Claim Settings tab.
3. Select the Use Unit Stat check box.
   The Unit Stat tab is added to the Workers Compensation claim window.
4. From the toolbar, select Save.

To Use Multiple Coverages Per Claim

1. From the Utilities menu, select System Parameters > General System Parameters Setup.
   The General System Parameter Setup window opens.

2. Select the Carrier Claim Settings tab.
   Select the Use Carrier Claims check box, so that you can attach multiple policies to general claims and worker compensation claims and track reserves at the policy level.

   > Note: Once you select the Use Carrier Claims check box, the Policy Management module will no longer be available. You can only use the base Policy Tracking module.

To Add a New Reserve

1. On the Reserve window, select the tab for the claimant you want to create a new reserve for.
2. From the toolbar, select the Add Reserve button.
   The Add Reserve window opens.

3. From the Policy drop down list, select the attached policy. (only attached polices are displayed.)
4. From the Coverage drop down list, select the coverage for the policy. (only coverages for the selected policy are displayed)
5. From the Reserve Type drop down list, select the reserve type. (only the reserve types for the claim line of business is displayed)
6. In the Amount field, enter the reserve amount.
7. Select the Save button.
   A new Reserve is created.

To Edit a New Reserve

1. On the Reserve window, select the tab for the claimant you want to edit reserve for.
2. From the Reserve table, select the Edit button next to the Reserve you want to edit.
   The Edit Reserve window opens.

3. Modify the fields as needed
4. Select the Save button.
   A reserve is updated.

To Make a Payment

1. On the Reserve window, select the tab for the claimant you want to create a payment for.
2. Select the Reserve you want to use to make the payment.

3. From the toolbar, select the Make Payment button.
    The Funds window opens.

4. Open the Funds Split Detail window.
5. On the Funds Split Detail window, the Policy, Coverage and Reserve Type fields are automatically populated and read-only.
6. In the Transaction Type field, select the transaction codes for the populated Reserve Type.
7. Enter payment information.
8. Select OK.

To Add a Collection and View Payment History

1. On the Reserve window, select the tab for the claimant you want to add a collection for.
2. Select the Reserve you want to use to add the collection.
3. From the toolbar, select the Add Collection button.
    The Funds window opens.

4. Open the Funds Split Detail window.

5. On the Funds Split Detail window, the Policy, Coverage and Reserve Type fields are automatically populated and read-only.
6. In the Transaction Type field, select the transaction codes for the populated Reserve Type.
7. Enter Collection information.
8. Select OK.

To View Payment History

1. On the Reserve window, select the tab for the claimant you want to view payment history for.
2. From the toolbar, select the Payment History button.
    The Payment History window opens displaying all the transactions that have happened for the claim.

To Attach Multiple Policies to Claims

1. Open the claim you want to attach multiple policies to.
2. On the Claim Info tab from the Policy Name field, select the Search button.

   A list of Policies opens. Only policies with an Event Date between Policy Effective and Policy Expiration Dates are displayed in the list.

3. Select the policies you want to attach to the claim.

   The Policies are listed in the Policy Name field.

4. From the toolbar, select Save.

To Schedule a Check

1. On the Reserve window, select the tab for the claimant you want to schedule a check for.
2. From the toolbar, select the Schedule Check button.

   The Auto Checks window opens. When you try to make a future payment, the Policy, Coverage and Reserve fields will be available in the Payment Detail Entry window and will be auto-populated from the Reserve chosen initially in Reserves window and will be read-only. Similarly, these fields will be available in Third Party Payment Detail Entry window.

To View a Financial Summary

1. From the toolbar, select the Financial Summary button.

   The Financial Summary window opens displaying the roll-up of the Reserves at the claim level.

Track Reserves at Policy Level

You can track financials and reserves at the policy coverage level, and you can attach multiple policies to a single claim for General Claims and Worker Compensation lines of business only.

You can only use this functionality for Policy Tracking policies. When you enable this functionality in RISKMASTER Utilities, the Policy Management System will automatically be disabled for ALL lines of business.

You must select the "Use Carrier Claims" check box in Utilities (as shown in the previous section) before you can track reserves at the policy level.

Notes:

- You cannot have multiple payees for a single funds transaction.

- When you create a funds transaction, all funds split transactions will be created for the same policy and coverage. If you want to create a funds transaction for a different policy or coverage, you will have to create a new funds transaction.

- Reserve worksheets are not supported by this functionality.

- BRS transactions are not supported by this functionality.

- There are no primary policies when you use this functionality.

- You cannot access Funds > Transactions from the main menu when you use this functionality.

Subrogation and Demand Offer Information Overview

You can add subrogation information to claims for all lines of business and add demand/offer details to subrogation records and to litigation records. You can add multiple subrogation records to each claim and multiple demand/offer records to each subrogation or litigation record. You can also generate record summaries for subrogation and demand offer records.

You can assign specific permissions for this module in the Security Management System and create PowerViews.

To Add Subrogation to Claims

1. Open the claim you want to add a subrogation record for.
2. From the Navigation bar, under the claim, right-click the Subrogation node.
   The Subrogation window opens.
3. Select the Subrogation Information tab.
4. Enter data into the fields as necessary
5. Similarly complete the fields on the Subrogation Financial tab and the Supplementals tabs.
6. To add comments, from the toolbar, select the Comments button and enter text into the Comments window.
7. From the toolbar, select Save.
8. From the toolbar, select the record summary ![R button icon] button to view a record summary.
   The record summary is displayed.
9. From the toolbar, select the Enhanced Notes ![Enhanced Notes button icon] button to open the Enhanced Notes for the associated parent claim record.

To Add Demand/Offer to a Subrogation Record

1. Open the subrogation record you want to add a Demand/Offer record for.
2. From the Navigation bar, under the Subrogation node, right-click DemandOffer and select Add New.
   The Demand/Offer window opens.
3. Complete the fields as necessary.
4. To add comments, from the toolbar, select the Comments button and enter text into the Comments window.
5. From the toolbar, select Save.

To Add Demand/Offer to a Litigation Record

1. Open the litigation record you want to add a Demand/Offer record for.
2. From the Navigation bar, under the Litigation node, right-click Demand/Offer and select Add New.
   The Demand/Offer window opens.
3. Enter data into the fields as necessary.
4. To add comments, from the toolbar, select the Comments button and enter text into the Comments window.
5. From the toolbar, select Save.
6. To view a record summary, from the toolbar select the record summary button.
   The record summary is displayed.

Making Department Field Optional Overview

You can make the Department field optional on Event and Claims windows for all lines of business. This lets you save events and claims without entering a department. It also lets you remove the Department field from Event or Claims windows in PowerView.

You can set up a default department in RISKMASTER Utilities. The default department will be automatically used when you save events and claims and leave the Department field blank.

To Set Up Default Department in RISKMASTER Utilities

1. From the Utilities menu, select System Parameters > General System Parameters Setup.
   The General System Parameter Setup window opens.
2. Select the Carrier Claim Settings tab.
3. Select the Auto Populate Department check box.
4. In the Department for Auto Population field, enter the default department, or select the lookup button to select from the Org. Hierarchy.

Once you have entered a default department, the Department field on the Event and Claims windows will not be a required field and you will be able to save events and claims without entering a department. The department you selected here will automatically be used on Event and Claims windows when you save.

5. You can also remove the Department field for Event and Claims windows in PowerView.
6. From the toolbar, select Save.

To Enter Liability Loss Information

1. Search for the claim to which you want to add liability loss information.
2. From the left navigation tree, expand the required claim node.
3. Right click the Liability link and select Add New.
   The Liability Loss window opens.

4. Complete the fields on the Liability Loss window: Liability Loss Information tab, as shown below.

Liability Type	Enter the code that best describes the type of liability insurance or select the button to select from the Code Selection window.
Affected Party	Enter or select the *** button to assign an entity as the Affected Party.
General Damage	Select the button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description of the general damages that occurred and then select the OK button. Note: General damages are those that cannot be easily assigned a monetary value. Examples are: emotional trauma and pain and suffering.
Special Damages	Select the button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the description of the special damages that occurred and then select the OK button. Note: Special damages are those assigned a monetary value. Examples are: medical bills and lost wages.

5. Complete the fields on the Liability Loss window: Other Insurance Information tab, as shown below.

Other Insurance	Select the check box to indicate whether another party, not directly involved in the incident or claim, provides other insurance.
Policy Holder is Property Owner	Select the check box to indicate whether the policyholder on the other insurance is also the owner of the involved property.
PolicyHolder	Enter or select the *** button to enter the policyholder's full name concerning the other insurance coverage.
Company	Enter or select the *** button to enter the name of the insurer on the other insurance coverage.
Policy Number	Enter the policy number for the other insurance coverage.
Coverages	Select the button to open the comments window and enter the description of relevant coverages provided by the other insurance company and then select the Save & Close button.
Limits	Enter the relevant coverage limits provided by the other insurance company.

6. From the toolbar, select the Record Summary ![R] button to open the Record Summary window.

7. From the toolbar, select the Enhanced Notes ![icon] button to open the Enhanced Notes for the associated parent claim record.

8. From the toolbar, select the Delete Record ![X] button to delete record.

9. From the toolbar, select the Save ![save] button.

Control Requests

Control Requests Overview

You can perform Correct Payments type of control request for carrier claims and non carrier claims.

When a payment is selected and Carrier Claims is turned on the system will retrieve the Financial Keys for the claim to allow the user to choose which is the appropriate Financial Key for the funds transaction.

When a payment is selected and Carrier Claims is turned off the system will retrieve the valid Transaction Types for the Claim (if Filter Transaction Types by Reserve Type is selected the system will retrieve the valid Reserve Types for the claim).

Only Printed Payments and Non-Voided Funds Transactions can have Control Request Correct Payment performed on them.

For Carrier claims, you can modify the Financial Key associated with a claim by creating a new financial key, then opening control request correct payment and selecting the new financial key and copying the funds transaction from the old financial key to the new financial key .

The original or source funds transactions have offsetting funds transactions created using the original financial key and new funds transactions are created using the destination financial key. Offsetting and new funds transactions created because of a control request have the parent trans ID stored in the database.

You can search for and select funds transactions using the control number and then select the destination financial key . Only printed and non-voided funds transactions are allowed to have a control request Correct Payment performed on it.

If automatic checks or non-occupational claim payments have been created with an incorrect financial key they must be deleted and new automatic checks or non-occupational claim payments created.

If you use the Policy System Interface, RISKMASTER updates the appropriate policy system, either via real time update or batch process.

For Non-Carrier claims, you can select a different Transaction Type and then create new Funds Trans Splits with the new Transaction Type. The original or source funds trans split records have offsetting splits created using the source Transaction Type and new funds trans split records are created using the destination Transaction Type.

To Setup Control Request to Correct Payment

1. From the main menu, select Utilities.
   The Utilities menu opens.
2. From the Utilities menu, select Managers.
   The Managers menu opens.
3. From the Managers menu, select Control Request.
   The Control Request window opens.

When Carrier Claims Feature is Not Activated

4.   From the Control Number field, select the button to open the Standard Payment Search window to search for the transaction Control Number which you want to correct.

5.   The Check Number field displays the number of the check associated with the transaction of the selected control number.

6.   The Payee First Name and Payee Last Name fields display the name of the payee associated with the payment.

7.   From the Source Financial Key field, select the option for the financial key based on which you want to update the incorrect funds split.

8.   From the Destination Reserve Type field, select the button to select the reserve type for the new funds trans split records.

9.   From the Destination Transaction Type, select the button to select the transaction type for the new funds trans split records.

10.   From the Reason For Change field, select the button to select the appropriate reason for changing the funds transaction.

> **Note:** Only Printed and Non-Voided Funds Transactions are allowed to have a Correct Payment performed on it. Non-Carrier Claims will have new splits created for the original funds transaction.

When Carrier Claims Feature is Activated.

4.   From the Control Number field, select the button to open the Standard Payment Search window to search for the transaction Control Number which you want to correct.

5.   The Check Number field displays the number of the check associated with the transaction of the selected control number.

6.   The Payee First Name and Payee Last Name fields display the name of the payee associated with the payment.

7.   From the Source Financial Key field, select the option for the financial key based on which you want to update the incorrect funds split.

8.   From the Destination Financial Key, select the option for the financial key which you want to update the incorrect funds split.

9.   From the Destination Transaction Type, select the button to select the transaction type for the new funds trans split records.

10.   From the Reason For Change field, select the button to select the appropriate reason for changing the funds transaction.

> **Note:** Only Printed and Non-Voided Funds Transactions are allowed to have a Correct Payment performed on it. Carrier Claims will have new funds transactions created when correction control request is created.

Events

Events Overview

In RISKMASTER , every claim is associated with an event . When an incident is reported, you first enter event information. You subsequently add claims to the event when claimants file claims related to the event. You can also directly enter claims. When you directly enter a claim RISKMASTER creates an event for the claim, using the information you enter into the claim.

CSC recommends that you enter event information before entering claim information.

You can add multiple claims to a single event. When you add a claim to an event, information you entered in the event is automatically entered into the claim. This saves you time when you add multiple claims to a single event.

Processing Events

Tips
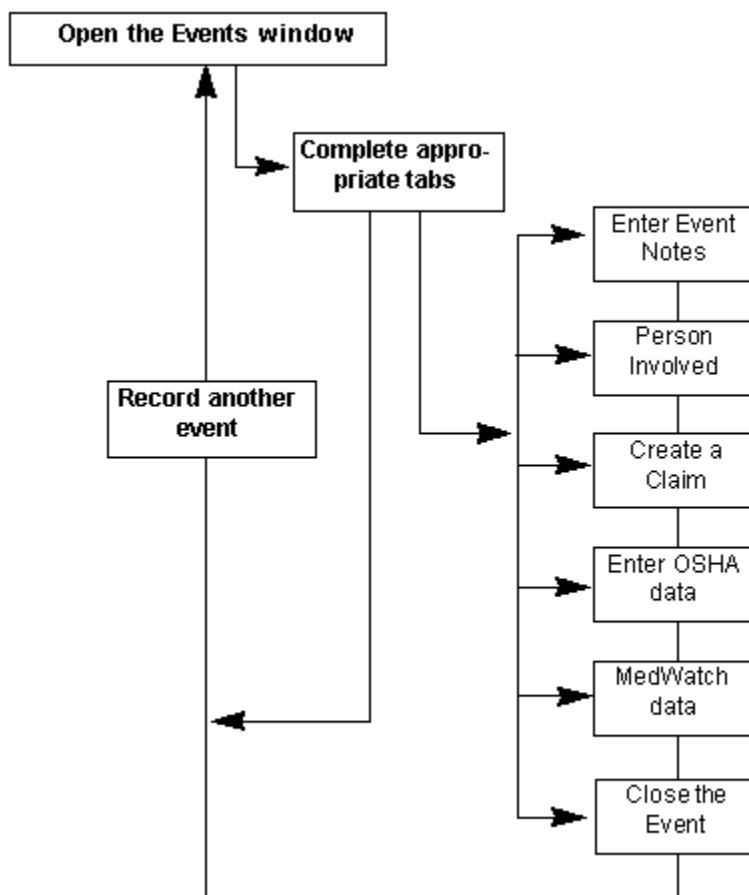
To Enter an Event

1. From the main menu, select Document.
    The Document menu opens.

2. From the Document menu, choose Event.

   The Event window opens and an Event node displays in the navigation tree.

3. Select and complete the fields in the Event Info tab , as shown below.

Event Number	Leave this field blank, so that RISKMASTER can generate a system-configured event number when you save the event. However, if your organization set it up, you can enter an event number manually.
Event Type	Enter the code that best describes the event or select the [search] button to select from the Code Selection window.
Date of Event	Enter the date on which the event occurred or select the search button to select from a calendar.
Time of Event	Enter the time when the event occurred.
	You must enter time in the format xx:xx, with a colon (:) between the hours and minutes. The time you enter defaults to AM unless you specify PM.
Event Status	Enter the code that best describes the event status, select the [search] button to select from the Code Selection window.
Event Indicator	Enter the code that best describes the event indicator or select the [search] button to select from the Code Selection window.
Event Category	When you enter the Event Indicator, the Event Category field automatically updates after you save.
Department	Enter the department, the individuals or equipment involved in the event belonged to or select the [search] button to select from the Org Hierarchy window.
Department Involved	Enter the department against which the claim is filed or select the [search] button to select from the Org Hierarchy window.
Date Reported	Enter date on which the claim was reported or select the button to select from a calendar.
Time Reported	Enter the time the claim was reported.
	You must enter time in the format xx:xx, with a colon (:) between the hours and minutes. The time you enter defaults to AM unless you specify PM.
Injury From	Enter the beginning date on which the injury occurred or select the button to select from a calendar.
Injury To	Enter the date after which the injury stopped being an issue or select the button to select from a calendar.

4. Select and complete the fields in the Event Detail tab , as shown below.

3.

Location Description	Enter a description for the location where the event occurred or select the button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK .
Event Description	Enter a description for the event or select the button to open the RISKMASTER Editor . In the RISKMASTER Editor, enter the description and then select OK.
Event On Premise	Select the check box if the event occurred,

- on your organization's property (if you are self-insured).

- on the insured organization's property (if you are a TPA).

Location Address	Enter the address where the event occurred. Enter the City, State, Zip, and Country in the appropriate fields.
County of Injury	Enter the county where the event occurred.
Primary Location	Enter the code that best describes the exact location where the event occurred or select the button to select from the Code Selection window.
Location Type	Enter the code that best describes the location type where the event occurred or select the button to select from the Code Selection window.
Cause Code	Enter the code that best describes the event cause or select the button to select from the Codes Selection window.
Number of Injuries	Enter the number of persons injured as a result of the event.
Number of Fatalities	Enter the number of deaths that resulted from the event.
Confidential Record	Select the check box to mark the record as confidential. When you mark a record as confidential, only a specific set of selected users can then view it.

4.
5.   Select and complete the fields in the Reported Info tab , as shown below.

Reporter's Last Name	Enter the reporter's last name or select the button to open the Standard Entity Search window and search for a reporter.

> If you select a reporter from the Search window, fields on the window for which informations exists are automatically populated.

First Name	Enter the reporter's first name.

Address	Enter the reporter's address. Enter the City, State, Zip, and Country in the appropriate fields.
Soc. Sec. No.	Enter the reporter's social security number (SSN).
Office Phone	Enter the reporter's work telephone number.
Home Phone	Enter the reporter's home telephone number.
Fax	Enter the reporter's fax number.

6.   Select and complete the fields in the Follow Up tab , as shown below.

Follow Up Date	Enter the date on which other activities occurred in response to the event or select the button to select from a calendar.
Date Physician Advised	Enter the date on which the physician was advised of the event or select the button to select from a calendar.
Time Physician Advised	Enter the time when the physician was advised of the event or select the button to select from a calendar.

> You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM unless you specify PM.

Carrier Notified Date	Enter the date on which your organization's insurance carrier was notified or select the button to select from a calendar.
Physician Notes	Select the button to open the RISKMASTER Editor. In the RISKMASTER Editor enter any comments the physician made and then select OK.
Treatment Given	Select the check box if a patient received medical treatment.
Release Signed	Select the check box if the patient signed a release.
Department Head Advised	Select the check box if the department head was notified.
Actions	Enter the code that best describes how your organization responded to the event, or select the button to select from the Code Selection window. You can select multiple codes. To remove a code from the field, select the code and select the button.
Outcome	Enter the code that best describes the impact of the event and the actions taken, or select the button to select from the Code Selection window. You can select multiple codes. To remove a code from the field, select the code and select the button.

Interventions   Select the button to open the Evaluation/Intervention window .

7.   Select and complete the fields on the Quality Management tab , as shown below.

         Case Number   Enter the medical case number.

         Med. File Category   Enter the code that best describes the medical category for the case or select the

 to select from the Code Selection window.

         Med. Indicator   Enter the code that best describes the medical indicator for the case or select the

 to select from the Code Selection window.

8.   From the toolbar, select the Save button .

9.   To add information about persons involved, from the left navigation tree, select Persons Involved under Event node and complete the Persons Involved window.

10.   To enter OSHA information, from the left navigation tree, select OSHA Information under Event nodeand complete the OSHA Information window.

11.   To add claims to the event, right click on the Event node and select the required claim type and complete the Claims for event window to add claims.

12.   If your organization defined Supplemental data, complete the Supplementals tab.

13.   From the toolbar, select the Save button .

> Note: Search for information in existing records, before you enter new data . This prevents duplicate entries in the database .

To Edit an Event

1.   Search for the event you want to edit.
         The event opens in the Event window.

2.   On the Events window, change the fields you want to edit.

3.   From the toolbar, select the Save button .

To Delete an Event

1.   Search for the event you want to delete.
         The event opens in the Event window.

2.   From the toolbar, select the Delete Record button .

         A window opens and displays a warning message.

3.   Select OK.

RISKMASTER deletes the event and all attached records.

Tips

To Enter OSHA Information

You can also enter data to generate OSHA reports. Occupational Safety and Health Administration (OSHA) is the main federal agency that enforces workplace safety and health legislation. General Liability and Workers' Compensation claim , and event data, is merged to create an OSHA report.

1. Search for the event you want to enter fall information for.
   The Event window opens.

2. From the left navigation tree, select OSHA under the Event Node.
   The OSHA window: OSHA Information tab opens.

3. Complete the fields on the OSHA window: OSHA Information tab , as shown below .

2.

Event OSHA Recordable	Select the check box if you want to notify OSHA of the event.
	If you are not sure whether the event is OSHA recordable, select the OSHA Recordability wizard button.
Activity When Injured	Select the button to open the RISKMASTER Editor and enter a description of the employee's activities when the event occurred.
How Accident Occurred	Select the button to open the RISKMASTER Editor and enter a description of how the event occurred.
	Your description must meet OSHA reporting requirements.
Object/Subst that Injured	Select the button to open the RISKMASTER Editor and enter a description of the item (object or substance) that caused the injury.
Safeguards Provided	Select the button to open the Code Selection window and do one of the following:

- Select **Yes** if the company provided safeguard equipment and set up protective measures.

- Select **No** if the company did not provide safeguards.

- Select **Unknown** if you are not aware of whether the company provided safeguards or not.

Failure to Use Safeguards	Select the [🔍] button to open the Code Selection window and do one of the following:

- Select **Yes** if the employee did not take necessary precautions.

- Select **No** if the employee took the necessary precautions.

- Select **Unknown** if you are not aware of whether the employee took the necessary precautions or not.

Failure to Follow Rules	Select the [🔍] button to open the Code Selection window and do one of the following:

- Select **Yes** if the employee did not follow OSHA rules.

- Select **No** if the employee did follow OSHA rules.

- Select **Unknown** if you are not aware of whether the employee followed OSHA rules or not.

Privacy Case	Select the check box if the case involves specific privacy issues, as outlined by OSHA regulations.
	If you select this option, the claimant 's name and social security number are withheld, when OSHA is notified.
	If you select this option, this record is not included in the OSHA 300 report.
Sharps Object	If a needle, suture, blade, or any other sharp object, (collectively, called sharps), caused the injury, then enter the code that most accurately describes the sharp object, or select the [🔍] button to select from the Code Selection window.
	This record is added to the Sharps log and reported to OSHA, only if the person involved is recorded as an Employee.
Sharps Brand/Make	If a sharp object caused the injury, enter the code that most accurately describes the company that made the sharp object, or select the [🔍] button to select from the Code Selection window.
OSHA Establishment	Select the [···] button to open the Standard Entity Search window and select an OSHA Establishment.
Print OSHA 301 Report	Select the button to print an OSHA 301(Injury and Illness Incident) report.
OSHA Recordability wizard	Select button to open a wizard and complete the steps to decide whether the event is OSHA recordable.
	Use the wizard only for recommendations, to manually mark the claim as recordable.

3.
4.   From the toolbar, select the Save button.
5.   To open the Event window or <u>Workers' Compensation window</u>, select the Back button.

Tips

To Enter Fall Information

Before you can track fall data, you must set up Occurrence Parameters in RISKMASTER Utilities , such that the Fall Event Categories and the Equipment Event Categories are configured to include the appropriate event category codes.

To enter fall information

1. Search for the event you want to enter fall information for.
    The Event window opens.

2. From the Event Indicator field, select the [🔍] button.
    A Code Selection window opens.

3. Select a code for an indicator that you want to associate with a fall-related Event Category.

4. From the toolbar, select the Save button [💾].
    RISKMASTER displays the associated Event Category and also displays the Fall Info button.

5. Select the Fall Info button.
    The Fall Information window opens.

6. Complete the fields on the Fall Information window , as shown below .

Condition Prior	Enter the code that best describes the patient's condition at the time of the event, or select the [🔍] button to select from the Code Selection window.
Side Rail Position	Enter the code that best describes the rail position on the facility bed, or select the [🔍] button to select from the Code Selection window.
Restraints	Enter the code that best describes the restraints used, if any, or select the [🔍] button to select from the Code Selection window.
Bed Position	Enter the code that best describes the bed position at the time of the event, or select the [🔍] button to select from the Code Selection window.
Call Light Within Reach	Select the check box if the patient can reach the call light.
Back to Event	Select to open the Event window.

7. From the toolbar, select the Save button [💾].
8. Select the Back to Event button.
    The Event window opens.

9. Save and close the Event window.

Tips

To Enter MedWatch Information

Before you can track MedWatch data, you must set up Occurrence Parameters in RISKMASTER Utilities , so that the Medication Event Categories are configured to include the appropriate event category codes.

To enter MedWatch information

1. Search for the event you want to enter MedWatch information for.
    The Event window opens.

2. From the Event Indicator field, select the search button.
    A Code Selection window opens.

3. Select a code for an indicator that is associated with medication event category.

4. From the toolbar, select the Save button .
    RISKMASTER displays the associated Event Category and also displays the MedWatch button.

5. Select the MedWatch button.
    The MedWatch window opens.

6. Select and complete the fields in the MedWatch Info tab , as shown below.

Reporter's Last Name	Enter the reporter's last name or select the button to open the Standard Entity Search window and search for the entity who reported the event.
	If you select a reporter from the Search window, fields on the window for which informations exists are automatically populated.
First Name	Enter the reporter's first name.
Address	Enter the reporter's home address. Enter the City, State, Zip, and Country in the appropriate fields.
Soc. Sec. No.	Enter the reporter's social security number (SSN).
Occupation	Enter the reporter's job position or select the button to select from the Code Selection window.
Office Phone	Enter the reporter's office phone number.
Home Phone	Enter the reporter's home phone number.
Health Professional	Select the check box if the reporter is a health professional.
Relevant History	Select the button to open the RISKMASTER Editor and enter any additional information about the medical history behind the event.

Date Reported to Manufacturer	Enter the date on which you reported the event to the medication manufacturer, or select the button to select from a calendar.
Date Reported to FDA	Enter the date on which you reported the event to FDA or select the button to select from a calendar.
Last Reported Date	Enter the date on which the event was previously reported.
Follow Up Count	Enter the number of times you have followed up on this event.
Product Problem	Select the check box if the product (medication) caused the event.
Hospitalized	Select the check box if the event resulted in hospitalization.
Required Intervention	Select the check box if additional medical staff was required to resolve the problem.
Mandatory Report	Select the check box if a report must be filed with an outside organization.
Adverse Event	Select the check box if the event can potentially result in a claim or a lawsuit.
Life Threatening	Select the check box if the injury resulting from the event was life threatening.
Congenital	Select the check box if a congenital problem caused the event.
Disability	Select the check box if the event resulted in a disability.

7. Select and complete the fields in the Equipment Indicator tab , as shown below.

Manufacturer's Name	Enter the name of the company that made the equipment or select the button to open the Standard Entity Search window and search for the manufacturer.
	If you select a manufacturer from the Search window, fields on the window for which informations exists are automatically populated.
Address	Enter the manufacturing company's address. Enter the City, State, Zip, and Country in the appropriate fields.
Brand Name	Enter the name the equipment is known by.
Equipment Type	Enter the code that best describes the type of equipment, or select the button to select from the Code Selection window.
Age of Device	Enter the age of the equipment, in years and months.

Device Available for Evaluation	Select the check box, if the equipment is available for evaluation.
Model Number	Enter the equipment's model number.
Catalog Number	Enter the equipment's catalog number.
Serial Number	Enter the equipment's serial number.
Lot Number	Enter the equipment's lot number.
Other Number	Enter any other number that your organization may have assigned to the equipment.
Device Operator Type	Enter the code that best describes the person who was operating the equipment, or select the button to select from the Code Selection window.
Expiration Date	Enter the equipment's expiration date, or select the button to select from a calendar.
Implant Date	Enter the date on which the equipment was implanted, or select the button to select from a calendar.
Explant Date	Enter the date on which the implanted equipment was removed, or select the button to select from a calendar.
Device Return Date	Enter the date on which the device will be returned after evaluation, or select the button to select from a calendar.

8. Select and complete the fields in the Medication Indicator tab , as shown below.

Medication Type	Enter the medication's major classification or select the button to select from the Code Selection window.
Medication Name	Enter the medication's trade name.
Dose	Enter the dosage administered.
Frequency	Enter how often the dosage was administered.
Route	Enter the method by which the medication was administered.
Therapy From	Enter the date on which the medication was started, or select the button to select from a calendar.
Therapy To	Enter the date on which the medication was stopped, or select the button to select from a calendar.

Duration	Enter the time span over which the dosage was administered. Enter Duration if you do not know the exact Therapy From and To dates or to specify a time span of less than one day.
Lot Number	Enter the manufacturer's lot number.
	Use this information for adverse event reports or therapeutic lack of effect reports.
NDC Number	Enter the National Drug Code number for the administered drug.
Expiration date	Enter the medication's expiration date, or select the button to select from a calendar.
Event Abated After Dose Stopped	Select the check box if the event subsided when the medication was stopped or reduced.
Event Reappeared After Re-Introduction	Select the check box if the event reappeared after the dosage was started again.

9. From the toolbar, select the Save button .
10. To enter test results related to the event, select the MedWatch Test button.
    The MedWatch Test window opens.

11. In the Test Date window, enter the date on which the test was performed, or select the button to select from a calendar.

12. From the Lab Test field, select the to open the RISKMASTER Editor and enter a description of the type of test administered.

13. From the Result field, select the to open the RISKMASTER Editor and enter a description of the results of the test.
14. Select the Back to MedWatch button.
15. To enter information about products related to the event, select the Concomitant Products button.
    The Concomitant Products window opens.

16. In the Concomitant Product Number field, enter the manufacturer's product number.
17. In the From Date and To Date fields, enter the time period for the product usage or select the button to select from a calendar.

18. From the Concomitant Product Description field, select the to open the RISKMASTER Editor and enter a product description.
19. Select the Back to MedWatch button.
20. On the MedWatch window, select the Back to Event button.

Tips

To Enter Quality Management Information

You can enter quality management details and initial review details for a medical case. In RISKMASTER you can use this consolidated data along with patient demographic and clinical treatment information to review a patient's medical care information. Medical care providers can use this information to identify best possible treatments and monitor patient's recovery.

To enter quality management information

1. Search for the event you want to enter quality management information for.
   The Event window opens.

2. Select the Quality Management tab.

3. Complete the fields on the Quality Management tab , as shown below .

   Case Number   Enter the medical case number.

   Med. File Category   Enter the code that best describes the medical category for the case or select the

    to select from the Code Selection window.

   Med. Indicator   Enter the code that best describes the medical indicator for the case or select the

    to select from the Code Selection window.

4. From the toolbar, select the Save button .

5. To enter initial review information, select the Initial Review link.
   The Quality Management Level: Initial Review window opens.

6. Complete the fields on the Quality Management Level: Initial Review window , as shown below .

   Status

   Enter the code that best describes the status of the case or select the
   to select from the Codes Selection window.

   Reviewer

   Select the button to open the Code Selection window and select the
   system user whom you want to assign as reviewer.

   Determination   Enter the code that best describes the review decision on the case or select

   the to select from the Code Selection window.

   Review Date   Enter date on which the reviewer conducted the initial review .

   Follow Up Date   Enter date on which the follow up is scheduled.

   Comments

   Select the button to open the RISKMASTER Editor and enter any
   additional comments on the initial review of the case.

   Recommendations/Actions

   Select the button to open the RISKMASTER Editor and enter any
   recommendations for the case.

7. From the toolbar, select the Save button .

8. To enter physical advisor review information, select the Physical Advisor Review link.
   The Quality Management Level: Physical Advisor Review window opens.

9. Complete the fields on the Quality Management Level: Physical Advisor Review window , as shown below .

Status	Enter the code that best describes the status of the case or select the to select from the Codes Selection window.
Physician	Select the button to open the Standard Entity Search window and select the physician whom you want to assign as reviewer.
Determination	Enter the code that best describes the review decision on the case or select the to select from the Code Selection window.
Review Date	Enter date on which the physician conducted the review.
Follow Up Date	Enter date on which the follow up is scheduled.
Comments	Select the button to open the RISKMASTER Editor and enter any additional comments on the initial review of the case.
Recommendations/Actions	Select the button to open the RISKMASTER Editor and enter any recommendations for the case.
Back to Event	Select to go back to the event.

10. From the toolbar, select the Save button.
11. To open the Events window, select the Back To Event button.

Note: Based on the levels of review undertaken, you can conduct a Committee Department Review, and a Quality Manager Review.

Tips

To Enter Evaluation/Intervention Information

You can add ergonomic intervention information to events.

To enter evaluation/intervention information

1. Search for the event you want to enter intervention information for.
   The Event window opens.

2. Select the Follow Up tab.
3. Select the Intervention Requested/Required check box, if you want to record or request for ergonomic intervention details related to an event.

Note: You can enter an intervention record even if you do not select the check box.

4. To enter evaluation/intervention information, select the Intervention button.
   The Intervention/Evaluation window opens.

5. Select and complete the fields on the Employee tab.

Name

Enter the name of the employee associated with the intervention or select the button to open the Standard Entity Search window and search for an employee.

Department

Enter the employee's department name or select the button to select from the Org Hierarchy window.

Supervisor

Enter the employee's supervisor of the employee or select the button to open the Standard Entity Search window and search for the supervisor.

Chief Complaint

Enter the code that best describes the employee's complaint type or select the button to select from the Code Selection window.

6. Select and complete the fields on the Evaluation/ Intervention tab.

Status

Enter the code that best describes the evaluation/intervention status or select the button to select from the Code Selection window.

Evaluator

Enter the name of the entity conducting evaluation or select the button to open the Standard Entity Search window and search for the evaluator.

Referral Source

Enter the code that best describes the entity who referred the employee for evaluation or select the button to select from the Code Selection window.

Request Received

Enter the date of receipt of an evaluation/intervention request or select the button to select from the calendar.

Evaluation Completed

Enter the date on which the evaluation was completed and recommendations made or select the button to select from the calendar.

Interventions

Enter the code that best describes the intervention type or select the button to select from the Code Selection window.

Anticipated Cost

Enter the expected cost of the proposed intervention.

Recommendation Sent

Enter the date on which the intervention recommendation was sent to the recipient or select the button to select from the calendar.

Recommendation Response

Enter the date of response to the recommended intervention or select the button to select from the calendar.

Non-compliance Reason

Enter the code that best describes the reason for non-compliance with the proposed intervention or select the button to select from the Code Selection window.

Intervention Description	Select the ![icon] button to open the RISKMASTER Editor and enter a description of the proposed intervention.

7. Select and complete the fields on the Time & Expense tab.

Rate	Enter the rate for the proposed intervention.
Time (hours)	Enter the time for intervention in hours.
Total/ Flat fee	Displays the total calculated amount for the intervention.

8. From the toolbar, select the Save button ![icon].

To Get a Quick Summary

You can generate quick summaries and executive summaries In RISKMASTER. Use a quick summary to review details about events and claims on a single window. You can configure an executive summary to contain details about claims, financials, diaries, and notes. However, you cannot change the configuration of a quick summary.

To Get a Quick Summary

1. Search for the claim or event for which you want to generate a quick summary.

2. From the RISKMASTER toolbar, select the Quick Summary button ![icon].
   The Quick Summary window opens.

3. From the left tab, select the item for which you want to view details.
   For example, under Event select Diaries to display the diaries associated with that event. The right frame displays the details.

To Add Persons Involved

1. Search for the claim or event to which you want to add Persons Involved Information.
2. From the navigation tree, under the required claim node select the Persons Involved link.
   A Lookup results window opens and displays the list of Persons Involved .

3. From the Lookup Results window, select the required Persons Involved .

4. To add a Persons Involved , right-click the claimant link in the left navigation tree and select Add New.
   The Persons Involved t window opens.

5. To associate an existing entity, select the Add Existing button, next to the Persons Involved type that you want.
   The Standard Entity Search window opens.

6. Complete the fields on the Standard Entity Search to search for the required entity.
   The Search Results window opens and displays all entities that match your search criteria.

7. To add a new Persons Involved, next to the appropriate Persons Involved, select the Add New button.
   The appropriate window opens based on the Persons Involved type that you selected.

8. Complete the fields on the window.

9. From the toolbar, select the Save button ![icon].

Search

To Search for Claims

1. From the main menu, select Search menu.
   The Search menu opens.

2. From the Search menu, select Claim.
   The Search window opens and a search node display in the left navigation tree.

3. On the Search window, select Claims as the search category.

4. In the Search Fields frame, from the Claim Date first drop down list select Between.
5. In the other two Claim Date fields, enter the start and end dates for the date range you want to specify.
6. Enter other parameters like Claim status , number etc to search for a claim.
   > Note: You can also search for a claim based on the enhanced notes attached to the claim. You can search as per the Enhanced Notes Text field and Enhanced Note Type field.

7. Select Submit Query.
   The Search window opens displays the results of your search.

8. Select the link for the record you want to open.
   The selected record opens in the appropriate window.

To Search for Saved Records

You can search for events, claims, entities, and other records. You can search specifically for a record by record number, or you can search by attributes like last names, status (open/closed), and so on. You can only search for records in the database from the data source you selected when you logged in.

To search for saved records:

1. From the main menu, choose Edit > Find.
   The Search window opens.

2. From the left frame, select the type of record to search for (Claims, Events, Entities, Funds, Comments, and so on).
3. From the Search Name drop down list, select a search name.

Note: The fields in the Search window change based on the Search type you choose.

4. Enter information into as many fields as you can.

Note: If you do not know the complete information for a field, enter as much as you know plus an asterisk (*). For example, in a Last Name field, you could type: p* to find all records with last names beginning with the letter P.

5. In the Sort By area, select fields to sort the results of your search by.
6. Select the Use Sound-Alike Match on Last Names check box, if you are uncertain of the last name.
7. Select the Return to Search check box,
8. Select the Save This Search check box if you want to save the selected search criteria for future use.
9. Select the Begin Search button.
   The Results For - window opens and displays the search results.

10. Select the required record and select the Select button.
    An appropriate window opens and displays the selected record.

Tips

To Lookup Existing Records

1. On any record window, from the toolbar select the Lookup button .
   The Lookup Results window opens and displays other records in the current record category.

2. On the Lookup Results window, select the Prev and Next links to move between records.

3. On the Lookup Results window, from the drop down select the fields based on which you want to filter the results.

4. On the Lookup Results window, from the drop down select the order in which you want to sort the results.

5. Select the link for the record that you want to open.
   On the record window, the field displays the details of the selected record.

To Set Up Custom Search Parameters

You can use Query Designer to custom design search window(s) to quickly find record(s). You can use the Search Query wizard to set up custom search parameters or to modify and/or delete existing search parameters. When you open the Search window in RISKMASTER, the Search Name drop down list under the appropriate search type displays the search criteria you created using the Query Designer.

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose Tools and Designers.

   The Tools and Designers menu opens.

3. From the Tools and Designer menu, choose Query Designer.

   The Query Designer window opens.

4. Select the Create New Search View button.
   The Search Query wizard opens.

5. In the Search Query wizard, respond to the questions and enter options into the fields.
6. Select the Next button on each window of the Search Query wizard.

Note: The Next button automatically displays when you complete the required fields.

7. From the last window of the Search Query wizard, select the Finish button.
   The Query Designer window displays the new search view under the category you selected.

Note: The fields on the Search window display based on your selections on the Search Query wizard.

Tips

To Search for Codes

1. On any record window, from the field in which you want to enter a code, select the search button .
   The Code Selection window opens and displays the appropriate codes.

2. From the code table of displayed codes, select the link of the code that you want to use.

   On the record window, the field displays the code you selected.

Query Designer Window

Use the Query Designer to set up the Search window for each search criteria. The Search Query wizard enables you to define custom searches or to modify or delete existing searches. You can also grant user permissions to control users access to particular searches.

To open	▪ From the main menu, select Utilities.
	▪ From the Utilities menu, choose Tools and Designers.
	▪ From the Tool and Designers menu, choose Query Designer.

Field definitions

Search Views	Displays the existing search views.
Create New Search View	Select to open the Search Query wizard and create a new search.
	Enter information into the fields on each of the following windows:

- ▪ Search Query wizard - Step 1 of 4 (Basic Information) window
- ▪ Search Query wizard - Step 2 of 4 (Query Field Selection) window
- ▪ Search Query wizard - Step 3 of 4 (Display Field Selection) window
- ▪ Search Query wizard - Step 4 of 4 (Query Use Permissions) window

> Note: When you open the Search window, the search you created displays in the Search Name drop down list under the appropriate search type.

Delete Search Views	Select an existing search and then select this button to delete the selected search.

Search Query wizard - Step 4 of 4 (Query Use Permissions) Window

Use the Search Query wizard - Step 4 of 4 (Query Use Permissions) window to assign permissions to specific users and/or groups to use the search criteria.

To open	From the Search Query wizard - Step 3 of 4 (Query Use Permissions) window, select the Next button.

Field definitions

All Users	Select the check box to enable all users to use the search criteria.
Select Users and/or Groups	Select the check box to enable selected individual users or user groups to access and use the search criteria.
	Note: The Users and Groups field becomes active.
Available Users and Groups	Displays all the individual users and groups of users of RISKMASTER .

Selected Users and Groups	Displays all the individual users and groups of users to whom you assigned the permission to use the search criteria.
	Note: Groups display with a asterisk (*)
[>>]	Select a user or group from the Users or Groups field and select the button to display your selection in the appropriate Users Permitted to Use Search or Groups Permitted to Use Search field.
[<<]	Select a user or group from the Users Permitted to Use Search or Groups Permitted to Use Search field and select the button to remove the permission assigned to the selected user or group.
Back	Select the button to open the Search Query wizard - Step 3 of 4 (Display Field Selection) window.
Finish	Select the button to save the search criteria and close the Search Query wizard.
Cancel	Select to close the Search Query wizard.

Search Query wizard - Step 1 of 4 (Basic Information) Window

Use the Search Query wizard - Step 1 of 4 (Basic Information) window to enter basic information such as name, description and type of search.

To open	From the Query Designer window, select the Create New Search View button.

Field definitions

What do you want to call your search?	Enter a unique name for your search parameter. For example, to create a new query to identify the payment amount for a specific loss disability code, you can name the search criteria as Loss Dis. Code Search.
What is the description of your search? (optional)	Enter a brief description for the new search criteria.
What type of search do you want to create?	From the drop down list, select the category in which you want to include the new search criteria.
Next	Select to open the Search Query wizard - Step 1 of 4 (Basic Information) window.
	Note: The Next button automatically displays when you complete the required fields.
Cancel	Select to close the Search Query wizard without saving the search criteria.

Search Query wizard - Step 2 of 4 (Query Field Selection) Window

Use the Search Query wizard - Step 2 of 4 (Query Field Selection) window to select the data fields you want to include in your search query criteria. You can select the order in which the data fields will display and will be used in the search criteria.

To open	From the Search Query wizard - Step 1 of 4 (Basic Information) window, select the Next button.

Field definitions

Fields Available for Search	Displays the fields for the search category you selected on the Search Query Wizard - Step 1 of 4 (Basic Information) window.
	Double click a field name to open the data fields.
Fields in Search	Displays the data fields you want to include in your search criteria.
![>>]	Select a data field from the Fields Available for Search field and select the button to add the field to the Fields in Search field.
![<<]	Select a data field from the Fields in Search field and select the button to remove the selected field from the list.
![up]	Select the repositioning button to move a data field up in the list that displays in the Fields in Search field.
![down]	Select the repositioning button to move a data field down in the list that displays in the Fields in Search field.
Back	Select the button to open the Search Query Wizard - Step 1 of 4 (Basic Information) window.
Next	Select the button to open the Search Query Wizard - Step 3 of 4 (Display Field Selection) window.
	Note: The Next button automatically displays when you complete the required fields.
Cancel	Select to close the Search Query wizard without saving the search criteria.
![properties]	Select a data field from the Fields in Search field and select the button to view the properties.

Search Query wizard - Step 3 of 4 (Display Field Selection) Window

Use the Search Query wizard - Step 3 of 4 (Display Field Selection) window to select the data fields you want to display on the Result window in RISKMASTER . include in your search query criteria. The default display will include all the data fields you select on the Search Query wizard - Step 2 of 4 (Query Field Selection) window, but you can add to or remove data fields from the existing list. The selected data fields display on the Search window in RISKMASTER in the order that you select.

To open	From the Search Query wizard - Step 2 of 4 (Query Field Selection) window, select the Next button.

Field definitions

Fields Available for Display	Displays all the data fields you selected on the Query wizard - Step 2 of 4 (Query Field Selection) window, to include in your search criteria.
Fields to Display	Displays the data fields you want to display on the Search window in RISKMASTER.
>>	Select a data field from the Fields to Display field and select the button to add the field to the Fields in Search field.
<<	Select a data field from the Fields in Search field and select the button to remove the selected field from the list.
▲	Select the repositioning button to move a data field up in the list that displays in the Fields in Search field.
▼	Select the repositioning button to move a data field down in the list that displays in the Fields in Search field.
Back	Select the button to open the Search Query wizard - Step 2 of 4 (Query Field Selection) window.
Next	Select the button to open the Search Query wizard - Step 4 of 4 (Query Use Permissions) window.
	Note: The Next button automatically displays when you complete the required fields.
Cancel	Select to close the Search Query wizard without saving the search criteria.

Search Overview

Use the Search command to locate events, claims, diaries, entities, employees, vehicles, policies, patients, physicians and funds records.

When you select the Search command, the Search window opens. The fields on the window change based on the record category you select. On the Search window you can enter the criteria or conditions you are looking for. Use this command to verify record input, or to retrieve a specific record for further processing when you are working with events and claims.

You can search for claims by Claim Number, Event or Claimant. For example, if a medical bill is used for entry, you can locate its associated claim by entering either the claim number, date of loss, or claimant name. You can search specifically for a record by record number, or you can search by attributes like last names, status (open/closed), and so on. You can only search for records in the database from the data source you selected when you logged in.

You can search for diaries by Task Name, Diary Owner, Activity or Due Date. The new check box in module security would control the availability of this feature to individual users.

Supervisory Approval

Introduction

Supervisory Approval UX is the integration of two previously existed functions 'Reserve Approval' and 'Approve Transaction'. Now, we have a single window on which Reserve and Payment approval can be carried out and both the functionality can be accessed individually by switching the tabs as per the requisites. The new UX also integrates 'My Pending Payment & Reserves' for providing a more precise and quick solution to the users. The new tool bar with more visual understanding allows user to carry out most of the functions under Supervisory Approval with ease.

To Navigate Supervisory Approval window

To Navigate Supervisory Approval Window

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu list, select Supervisory Approval.
   The Supervisory Approval window opens.

Supervisory Approval window: Reserve Tab

The Reserve Tab lists all reserves which are on hold for approval.

	▪ From the main menu, select Funds.
To open	▪ From the Funds menu, choose Supervisory Approval.
	▪ From the Supervisory Approval, Choose Reserve Tab.

Field definition

User	Displays the list of the all the reserves on hold.
User Group	Displays the list of the reserves available within the authority of the user.
Pending	Displays the pending reserves at manager's level.
Approve	Displays the list of all approved financial.
Reject	Displays the list of all rejected financial.
Refresh	Allows to refresh the financial.
Edit Column	Allows the columns to edit.
Save State	Allows saving the columns.
Restore State	Allows restoring of columns.

Export To Pdf	Allows data to export to PDF.
Export To Excel	Allows the data to export to excel.
Claim Number	Displays the Claim number.
Claimant	Displays the name of the claimant for the claim associated with reserve worksheet.
Reserve Type	Display the type of the financial reserve.
Reserve Amount	Display the total reserve amount in the reserve worksheet.
Incurred Amount	Display the total incurred (Client is liable for) amount.
Prior Reserve Amount	Display the prior reserve amount.
Submitted By	Displays the name of the user who submitted the reserve worksheet for approval.
Date Submitted	Displays the date when reserve worksheet is submitted for approval.
Claim Status	Displays the status of the claim associated with the reserve worksheet.
Benefit Review Date	Displays the benefit review date.
Hold Reason	Displays the reason for hold of financial.
Line of Business	Displays the Line of business of the user.
Claim Type	Displays the type of the claim associated with the reserve worksheet.
Date of Claim	Displays the date of the claim associated with the reserve worksheet.
Current Adjuster	Displays the name of the current adjuster.
Policy Name	Displays the name of the policy attached with the claim.
Policy Holder Name	Displays the name of the user who holds the policy.
Submitted To	Displays the name of the person to whom the reserve worksheet is submitted for approval..

Payment Tab

The Payment Tab lists all payments which are on hold for approval.

	▪ From the main menu, select Funds.
To open	▪ From the Funds menu, choose Supervisory Approval.
	▪ From the Supervisory Approval, Choose Payment Tab.

Field definition

User	Displays the list of the all the payments on hold.
User Group	Displays the list of the payments available within the authority of the user.
Pending	Displays the pending payments at manager's level.

Queued	Displays the payments on hold in queued view.
Approve	Displays the list of all approved financial.
Reject	Displays the list of all rejected financial.
Refresh	Allows to refresh the financial.
Edit Column	Allows edit of columns in the grid.
Save State	Allows saving of selected column in the grid.
Restore State	Allows restoring of the columns in the grid.
Export To Pdf	Allows data to export in PDF file.
Export To Excel	Allows data to export in Excel file.
Claim Number	Displays the claim number.
Claimant	Displays the name of the claimant for the claim associated with reserve worksheet.
Control Number	Displays the transaction control number.
Fund Date	Display the date on which fund is submitted.
Payee	Display the name of the payee.
Amount	Display the amount of the payment.
Split Amount	Display the split amount of the payment.
Trans Type	Displays the type of the transaction.
Reserve type	Displays the type of the reserve for payment.
Comment	Displays the comments left on payment.
Submitted by	Displays the name of the user who submits the payment.
Service Dates	Displays the date from which the service starts.
Hold Reason	Displays the reason for hold of payment.
Line of Business	Displays the line of business of the user.
Claim Type	Displays the type of claim for the payment.
Date of Claim	Displays the date of the claim associated with the payment.
Current Adjuster	Displays the name of the Adjuster.
Policy Name	Displays the policy name.
Policy Holder Name	Displays the name of the person who holds the policy.

LSS Invoice	Displays the invoice generated for LSS.
Submitted To	Displays the name of the person to whom the payment is submitted.

User Document

Tips	

Attachments Window

Use the Attachments window to display documents attached to the open record, and to attach new documents to records. You must open the Attachments window with a record open to display or add attachments to that record.

To open
- Search for the event or claim you want to attach the file to.

- From the toolbar, select ⬚.

Field definitions

Add New button
Select to open the Add New Document window.

Email
Select a file from the list and then select this button to email the file.

Print Selected Files
Select a files from the list and then select this button to print them.

Download Selected Files
Select a files from the list and then select this button to download them.

Delete
Select a file from the list and then select this button to delete the file.

Reload
Select this button to reload the records.

Add New Document Window

Use the Add New Document window to enter details about a file that you are attaching to a record, a file that you are assigning as a **user document** , or a new **mail merge** document.

To open
From the My Documents window opens, select the Add New button.

Field definitions

Title   Enter a name for the document. This name can be up to 32 characters long.

Subject   Enter a subject for the document.

Type
                   Enter the code that best describes the document type you want to create, or select the button to select from the Code Selection window.

Class
                   Enter the code that best describes the document class you want to create, or select the button to select from the Code Selection window.

Category
                   Enter the code that best describes the document category you want to create, or select the button to select from the Code Selection window.

Keywords   Enter keywords that RISKMASTER uses to find this document when you search for the document.

Notes   Enter any additional comments about the document.

Save   If you open the New Document window from the Attachments window, select to attach the document to the record.

                   If you open the New Document window from the My Documents window, select to assign the document to your User ID.

Cancel   Select to close the window without saving.

Tips

Document List window

Use the My Documents window to display your user documents and to add new documents to your user documents. Login with your User ID to display your user documents in this window.

To open   ▪   From the main menu, select User Documents.

                       ▪   From the User Documents menu, select Documents List.

Field definitions

Reload   Select to display the most recent documents.

Add New   Select to open the Add New Document window.

Move	Select the check box for a document and select the button to open the Move Folders window and select a folder to which you want to move the document.
E-mail	Select the check box for a document and select the button to open the E-mail Documents window and select a user/s to whom you want to email the document. You can also enter additional email IDs and a message for the recipients.
Delete	Select the check box for a document and select the button to delete the document.
Transfer	Select the check box for a document and select the button to open the Transfer Documents window and select a user/s to whom you want to move the document. Note: RISKMASTER removes the document from your user documents and displays on the My Documents window of the user to whom you transferred the document.
Copy	Select the check box for a document and select the button to open the Copy Documents window and select a user/s to whom you want to mark a copy of the document. Note: RISKMASTER displays the document on the My Documents window of the user to whom you marked a copy of the document.
Create Folder	Select to create the folder.

To Create User Documents

1. From the main menu, select User Documents.
   The User Documents menu opens.

2. From the User Documents menu, select Documents List.
   The My Documents window opens.

3. From the My Documents window, select the Add New button.
   The Add New Document window opens.

4. Complete the fields on the Add New Document window.

Document Folder	Displays the folder in which RISKMASTER stores the document you are attaching.
Title	Enter a name for the document. This name can be up to 32 characters long.
Subject	Enter a subject for the document.
Type	Enter the code that best describes the document type you want to create, or select the button to select from the Code Selection window.

Class

Enter the code that best describes the document class you want to create, or select the [magnifying glass icon] button to select from the Code Selection window.

Category

Enter the code that best describes the document category you want to create, or select the [magnifying glass icon] button to select from the Code Selection window.

Keywords

Enter keywords that RISKMASTER uses to find this document when you search for the document.

Notes

Enter any additional comments about the document.

File Name

Select the Browse button to navigate to and select the file you want to attach.

To select multiple files, press the Ctrl key on the keyboard and then select the file name.

Save [save icon]

If you open the New Document window from the Attachments window, select to attach the document to the record.

If you open the New Document window from the My Documents window, select to assign the document to your User ID.

Cancel

Select to close the window without saving.

5. To attach a file saved on your machine or on a network machine, from the File Name, select the Browse button.
6. From the Choose File window, navigate to the file and select the file to add to your user documents list.
7. Select Open.
   The File Name field displays the path of the file that you selected.

8. Select Save.
   The new document displays in the My Documents window.

To Work with User Documents

1. From the main menu, select User Documents.
2. The User Documents menu opens and a User Documents node appears in the left navigation tree.
3. From the User Documents menu, choose Documents List.
   The My Documents window opens.

4. To view the most recent documents list, select the Refresh button.
5. To move between windows and view the documents in the list, select the First, Prev, Next or Last links.
6. To create a new folder in which you want to your documents, enter the field name in the Enter Folder Name to Create here field.
7. Select the Create Folder button.
   The folder you create, displays on the Add New Documents window.

8. To create a new user document, select the Add New button.

To move a document

1. To move a document from one folder to another, select the check box for the document and select the Move button.

Note: You can select multiple documents.

The Move Documents window opens.

2. Select the folder to which you want to move the document and select the Move button.

    The My Documents window displays the folder name and documents in the folder.

To transfer a document

1. To transfer a document from one user to another, select the check box for the document and select the Transfer button.

    The Transfer Documents window opens.

2. Select the user/users to whom you want to transfer the document and select the Transfer button.

    RISKMASTER removes the document from your user documents and displays on the My Documents window of the user to whom you transferred the document.

To copy a document

1. To mark a copy of a document to another user, select the check box for the document and select the Copy button.

    The Copy Documents window opens.

2. Select the user/users to whom you want to mark a copy of the document and select the Copy button.

    RISKMASTER displays a copy of the document on the My Documents window of the user to whom you marked a copy of the document.

To e-mail a document

1. To email a document, select the check box for the document and select the E-mail button.

    The E-mail Documents window opens.

2. Select the user/s to whom you want to email the selected document.
3. In the E-Mail document(s) to following additional recipient(s) field, enter the email IDs of any other recipients.
4. In the Message for the Recipients field, enter a message or subject for your email.
5. Select the E-Mail button.

    RISKMASTER e-mails the document to the selected recipients.

To delete a document

1. To delete a document, select the check box for the document and select the Delete button.

    A Confirm/File Folder Delete window opens.

2. Select the Delete button.

    RISKMASTER deletes the document.

To Attach Files to Events and Claims

1. Search for the event or claim you want to attach the file to.

    The event opens in the Event window or the claim opens in a Claims window.

2. From the toolbar, select the Attach Documents button .

    The Attachments window opens.

3. On the Attachments window, select the Add New button.

    The Add New Document window opens.

4. Complete the fields on the Add New Document window , as shown below.

    | Title | Enter a name for the document. This name can be up to 32 characters long. |

Subject	Enter a subject for the document.
Type	Enter the code that best describes the document type you want to create, or select the ![search icon] button to select from the Code Selection window.
Class	Enter the code that best describes the document class you want to create, or select the ![search icon] button to select from the Code Selection window.
Category	Enter the code that best describes the document category you want to create, or select the ![search icon] button to select from the Code Selection window.
Notes	Enter any additional comments about the document.
Save	If you open the New Document window from the Attachments window, select to attach the document to the record. If you open the New Document window from the My Documents window, select to assign the document to your User ID.
Cancel	Select to close the window without saving.

5. To attach a file saved on your machine or on a network machine, select the Click here to select files for attachment button.
6. From the Choose File window, navigate to the file and select the file to attach.
7. Select Open.

   The File Name field displays the path of the file that you selected.

8. Select Save.

   The new attachments displays in the My Documents window.

User Documents and Attachments Overview

User Documents

A user document is any document assigned to you in RISKMASTER. To create a user document, you can attach existing files, such as text files and sound files, on a local or network drive, to your list of documents. You can also create a user document by scanning printed materials and saving images as files. You can view, print, or detach user documents.

When you attach a file to a record, RISKMASTER saves a copy of the file in the documents directory for your database and records it as a user document assigned to you. When you open the User Documents window, it displays all user documents assigned to you. If you transfer a user document to another user, the document does not display when you open the User Documents window.

You can use command buttons to print, delete, view the properties of and open user documents.

Attachments

An attachment is any document that is attached to at least one record in RISKMASTER. When you attach a file to a record, RISKMASTER saves a copy of the file in the documents directory for your database and records it as a user document assigned to you. When you display a record, you can list all files attached to that record.

> Note: If you cannot attach a file or create a user document, contact your system administrator. Your system administrator may need to re-configure your permissions.

You can use command buttons to print, delete, view the properties of and open attachments.

MMSEA

TPOC Data Window

To open
On the Claimant MMSEA Data window: Beneficiary/Award/TPOC tab, from the TPOC (Total Payment Obligation to the Claimant) Date field, select the [icon] button.

Field definitions

Funding Delayed Beyond TPOC Start Date'	Enter the total payment obligation to the claimant start date beyond which funding will be delayed.
TPOC Amount	Enter the total payment obligation to the claimant amount.
Date of Written Agreement	Enter the date on which the agreement was written or select date from the calendar.
Date of Court Approval	Enter the date on which court approved the agreement or select date from the calendar.
Date of Payment Issue	Enter the date on which the payment was issued or select date from the calendar.
Mark As Deleted	Select the check box if you want to mark TPOC entry as deleted for reporting purposes.
OK	Select the button to save the record.
Cancel	Select the button to close the window.

MMSEA Data Details Window

To open

- From the Organization Hierarchy window: Department Info tab, select the MMSEA Section 111 button.

- On the MMSEA Data window, select the [icon] button or select option for an MMSEA record and then select the [icon] button.

Field definitions

Line Of Business	From the drop down, select the line of business for the MMSEA record.
MMSEA Reporter ID	Enter the MMSEA reporter identification number.
MMSEA Office Code/Site ID	Enter the MMSEA office code or site Identification number.

Medicare Filing Schedule	Select the [🔍] button to open Code Selection window and then select the medicare filing schedule.
OK	Select the button to save the record.
Cancel	Select the button to close the window without saving the changes.
Recovery Agent Details	Select to submit recovery agent information in MMSEA.

MMSEA Party to Claim Window

To open	On the Claimant MMSEA Data window: Diagnosis/Parties to Claim tab, from the MMSEA Parties to the Claim tab, select the [📄] button.

Field definitions

Relationship to Beneficiary	Enter the code for relationship to beneficiary type or select the [🔍] button to open the Code Selection window and select the code.
Type of Representative	Type of Representative' field, enter the representative type or select the [🔍] button to open the Code Selection window and select the representative type.
Person/Entity Name	Enter the person or entity name or select the [🔍] button to open the Code Selection window and select the entity name.
Party to Claim Representative	Enter the party to claim representative code or select the [🔍] button to open the Code Selection window and select the code.

Claimant MMSEA Data Window: Product Liab/MMSEA Returned Tab

To open	From the Claimant MMSEA Data window, select Product Liab/MMSEA Returned tab.

Field definitions

Product Liability Data

Product Liability Indicator	Select the [🔍] button to search for the product liability indicator.
Product Generic Name	Enter the generic name of the product.
Product Brand Name	Enter the brand name of the product.
Product Manufacturer	Enter the product manufacturer name.
Product Alleged Harm	Select the [...] button to enter the alleged harms which the product may cause.

MMSEA Retuned – Applied

MSP (Medicare Secondary Payer) **Effective Date**	Enter the Medicare secondary payer effective date or select date from the calendar.
MSP Termination Date	Enter the Medicare secondary payer termination date or select the date from the calendar.

Enter the Medicare secondary payer indicator type.

MSP Type Indicator

> **Note:** The value in the Disposition Code field will be set only by the extraction application's returned file(s). This data element is the disposition code returned by Medicare.

Claimant MMSEA Data Window: Beneficiary/Award/TPOC Tab

To open   From the Workers' Compensation window: Employee Info tab, select the MMSEA Data button.

Field definitions

Is Claimant a Medicare Beneficiary'	Select the [🔍] button to select whether the claimant is a Medicare beneficiary or not.
Are all Payments For This Claimant Non-Medical'	Select the [🔍] button to select whether payments for this claimant are non-medical or not.
Claimant's Medicare Health Insurance Claim Number, if known'	Enter the claimant Medicare health insurance claim number.
Date Medicare Confirmed as Beneficiary	Displays the date when Medicare confirmed as beneficiary.
Alleged Cause of Injury, Incident, or Illness (CD ICD-9 Event Code)	Select the [🔍] button to select the ICD-9 event code for Injury, Incident or Illness as defined by the Center for Disease Control.
Alleged Cause of Injury, Incident, or Illness (CD ICD-10 Event Code)	Select the [🔍] button to select theICD-10 event code for Injury, Incident or Illness as defined by the Center for Disease Control.
Last Reporting Date	Displays the last reporting date of medicare.
If Filed With Medicare, Delete This Record	From the drop down list, select whether you want the Medicare record to be deleted if the record has all the information or not.
Award, Judgment, Settlement or Other Payment	
ORM (Ongoing Responsibility for Medicals) Indicator field	Select the [🔍] button to select the ORM indicator.
ORM Termination Date	Enter the ORM termination date or select the date from the calendar.

Client Information Setup Window: MMSEA Medicare Tab

To open
- From the main menu, select Utilities.
- From the Utilities menu, choose Managers.
- From the Managers menu, choose Client Information Setup.
- On the Client Information Setup window, select the MMSEA Medicare tab.

Field definitions

Doing Business As	Enter the name on which the user is carrying out it's operations.
Legal Name, if no Doing Business	Enter the legal name of the user if there is no business name.
MMSEA DATA	
Line of Business	Displays the line of business for the client.
Reporter ID	Displays the reporter Identification number.
Office Code/Site ID	Displays the code of the office or the site identification number for the client.
Medicare Filing Schedule	Displays the schedule of filing the Medicare.

Select the button to create a new MMSEA data record for the client.

Select the button to edit the MMSEA data record.

Select the button to delete the MMSEA data record.

Claimant MMSEA Data Window: Diagnosis/Parties to Claim Tab

To open   On the Claimant MMSEA Data window, select the Diagnosis/Parties to Claim tab.

Field definitions

CDC ICD-9 Diagnosis Codes	Select the ••• button to enter the diagnosis codes defined by the Center for Disease Control and not by any jurisdiction or Ingenix.
CDC ICD-10 Diagnosis Codes	Select the ••• button to enter the diagnosis codes defined by the Center for Disease Control.
MMSEA Parties to the Claim	Displays the MMSEA party to claim record details.

MMSEA Data Window

To open   From the Organization Hierarchy window: Department Info tab, select the MMSEA Section 111 button.

Field definitions

Line Of Business	Displays the line of business for the MMSEA record.
MMSEA Reporter ID	Displays MMSEA reporter identification number.
MMSEA Office Code/Site ID	Displays MMSEA office code or site Identification number.
Medicare Filing Schedule	Displays the medicare filing schedule for the MMSEA record.

	Select the button to create a new MMSEA record.
	Select the option for the desired record edit and then select the button to modify the record.
	Select the option for the desired record and then select the button to delete the record.
Back	Select the button to navigate to Organization Hierarchy window.

To Add an MMSEA Responsible Reporting Entity

You can set the MMSEA Responsible Reporting Entity (RRE) for tracking claimants to be reported. This applies to Insurers, Self Insured's and Liability Self-Insured pools. The 'Liability Self-Insured pools' function as Insurers, but cannot use policies.

Note: The existing CSC EDI Extract System does not function without policies for 'Liability Self-Insured pools'. Any entity working as a RRE can have one or more Line of Business per ID and the entity can have an ID per Line of Business.

For Self Insured, the RRE is set up in the Organization Hierarchy as shown next:

1. From the main menu select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose Org. Hierarchy.
   The Org. Hierarchy window opens.

3. From the 'Default Expansion Level for List' drop down list, select Facility.
4. Select an existing Organization Hierarchy facility and select the Edit button.
   The Facility window: Facility tab opens.

5. Select the MMSEA Section 111 button.

The MMSEA DATA window opens.

The MMSEA Data field displays the Line of Business, Reporter ID and Office Code or Site ID.

Note: The Organization Hierarchy Entity can be registered with a different reporter ID and site ID for each Line of Business. The registration will be based on the FEIN of the Organization Hierarchy entity at or above the Self Insured.

6. To add new MMSEA data, select the New button.

The MMSEA Data Details window opens.

> **Note:** You cannot duplicate a LOB. For example, if you selected Workers Compensation as the LOB and entered a Reporter ID and Office Code / Site ID and saved the record, then, you cannot use the Workers Compensation LOB for another Reporter ID and Office Code. Each LOB is unique. If you select 'All' as the LOB, then you cannot add any other LOB.

7. In the Add/Edit section, from the Line of Business drop down list, select a line of business.
8. In the MMSEA Reporter ID field, enter the MMSEA reporter identification number.
9. In the MMSEA Office Code/Site ID field, enter the MMSEA office code or site identification number.
10. Select the OK button.

To Access the MMSEA Data Fields

1. On the Workers' Compensation window: Employee Info tab, select the MMSEA Data button.
    The Claimant MMSEA Data window: Beneficiary/Award/TPOC tab opens.

    > **Note:** The same Claimant MMSEA Data window opens with or without Case Management.

2. From the 'Is Claimant a Medicare Beneficiary' field, select the button to select whether the claimant is a Medicare beneficiary or not.

3. From the 'Are all Payments For This Claimant Non-Medical' field, select the button to select whether payments for this claimant are non-medical or not.

4. In the 'Claimant's Medicare Health Insurance Claim Number, if known' field, enter the claimant Medicare health insurance claim number.

   Note: The 'Date Medicare Confirmed as Beneficiary' field is disabled.

5. From 'Alleged Cause of Injury, Incident, or Illness (CD ICD-9 Event Code)' field, select the button to select the event code for Injury, Incident or Illness as defined by the Center for Disease Control, not by NCCI.

   Note: The 'Last Reporting Date' field is also disabled as another application uses this field.

6. From the 'If Filed With Medicare, Delete This Record' drop down list, select whether you want the Medicare record to be deleted if the record has all the information or not.

   Note: The record gets deleted only for reporting purposes and does not get deleted from the database.

7. In the Award, Judgment, Settlement or Other Payment section, from the ORM (Ongoing Responsibility for Medicals)Indicator field, select the button to select the ORM indicator.

8. In the ORM Termination Date field, enter the ORM termination date or select the date from the calendar.

To Create MMSEA Claim Party Entities

1. From the main menu, select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose People.
   The People Maintenance window opens.

3. From the Type of Person drop down list, select the people type as 'MMSEA Claim Party Entity'.

4. In the Last Name field, enter the persons' last name.

5.   In the Middle Name field, enter the person's middle name.

6.   In the First Name field, enter the person's first name.

7.   In the Date of Birth field, enter the person's date of birth or select date from the calendar.

8.   In the Also Known As field, enter any other name that the person may be known by.

9.   In the Initials field, enter the person's initials.

10. In the Address field, enter the person's address. Enter the City, State, Zip, County and Country in the appropriate fields.

11. In the Soc. Sec No. field, enter the person's social security number.

12. In the Office Phone field, enter the person's office phone number.

13. In the Home Phone field, enter the person's home phone number.

14. In the Fax field, enter the person's fax number.

15. In the Sex field, enter the employee's gender or select the button to select from the Code Selection window.

16. In the EMail Type field, enter the type of email system the person uses or select the button to select from the Code Selection window.

17. In the EMail Address field, enter the person's email address.

18. Select the 1099 Reportable check box, if you have to issue a 1099 report for the entity.

19. Select the 1099 Parent button to open the Standard Entity Search page and search for the 1099 reportable parent entity.

20. Select the Freeze Payment check box if you want to freeze the payments for the people.

21. In the NPI Number field, enter the national provider identifier number.

22. Select the Save button.

Tips

To Set Client Information Parameters

1.   From the main menu select Utilities.
     The Utilities menu opens.

2.   From the Utilities menu, choose Manager.
     The Managers menu opens.

3.   From the Managers menu, choose Client Information Set Up.
     The Client Information Setup window opens.

4.   In the Client Name field, enter the name of your organization.

5. In the ESSP # field, enter the ESSP number of your organization.

6. In the Address field, enter the organization address. Enter the city, state and zip in the appropriate fields.

7. In the Product field, enter the RISKMASTER products your organization has purchased and installed.

8. In the Printer field, enter the printer type you use.

9. In the Hardware field, enter the brand, processor and memory for the computers on which your organization runs RISKMASTER.

10. In the Tax ID field, enter the tax ID as it is required to be a responsible reporting entity.

11. In the Installation Date field, enter the date on which CSC installed RISKMASTER in your organization.

12. In the Phone field, enter your organization's phone number.

13. In the Fax field, enter your organization's fax number.

14. In the Distribution Media field, enter the diskette size for the computers on which your organization runs RISKMASTER or select the [🔍] button to search from the Code Selection window.
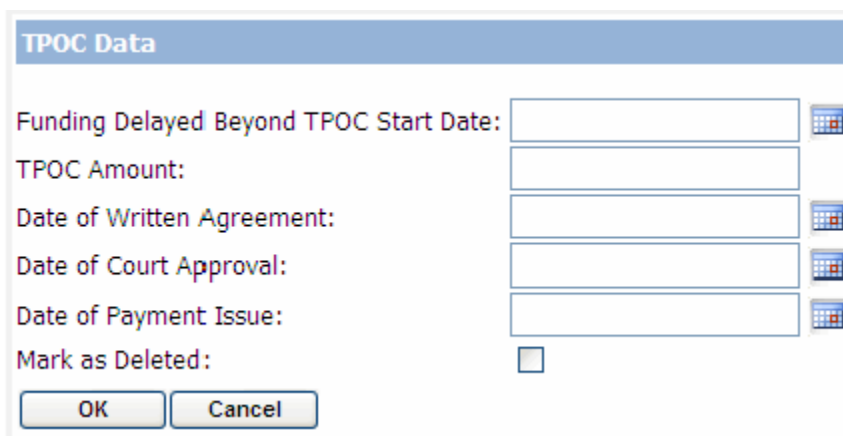
15. In the Client Status field, enter the client status.

16. In the Version field, enter the latest RISKMASTER release number that your organization uses.

17. In the CSC Support # field, enter the phone number your organization uses to call RISKMASTER Customer Support.

18. Complete the fields on the

    - Contact Information tab

    - MMSEA Medicare tab

19. Select the [💾] button.

[Tips]

To Add a New TPOC Date Record

1. On the Claimant MMSEA Data window: Beneficiary/Award/TPOC tab, from the TPOC (Total Payment Obligation to the Claimant) Date field, select the [📄] button.
    The TPOC Data window opens.

2. In the 'Funding Delayed Beyond TPOC Start Date' field, enter the total payment obligation to the claimant start date beyond which funding will be delayed.

3. In the 'TPOC Amount' field, enter the total payment obligation to the claimant amount.

4. In the 'Date of Written Agreement' field, enter the date on which the agreement was written or select date from the calendar.

5. In the 'Date of Court Approval' field, enter the date on which court approved the agreement or select date from the calendar.

6. In 'Date of Payment Issue' field, enter the date on which the payment was issued or select date from the calendar.

7. Select the 'Mark As Deleted' check box if you want to mark TPOC entry as deleted for reporting purposes.

> Note: The TPOC entry record gets deleted only for reporting purposes and does not get deleted from the database.

8. Select the OK button.

9. The Delete button is enabled only when a TPOC entry with no date in the 'Date Received' column is selected.

> Note: The MMSEA Medicare does not allow you to delete a TPOC record that has been filed. The MMSEA Filed Date database value will be updated by the extract application. The Delete button will physically delete a selected TPOC from your database.

10. From the Claimant MMSEA Data window, select the Diagnosis/Parties to Claim tab.

    The Claimant MMSEA Data window: Diagnosis/Parties to Claim tab opens.
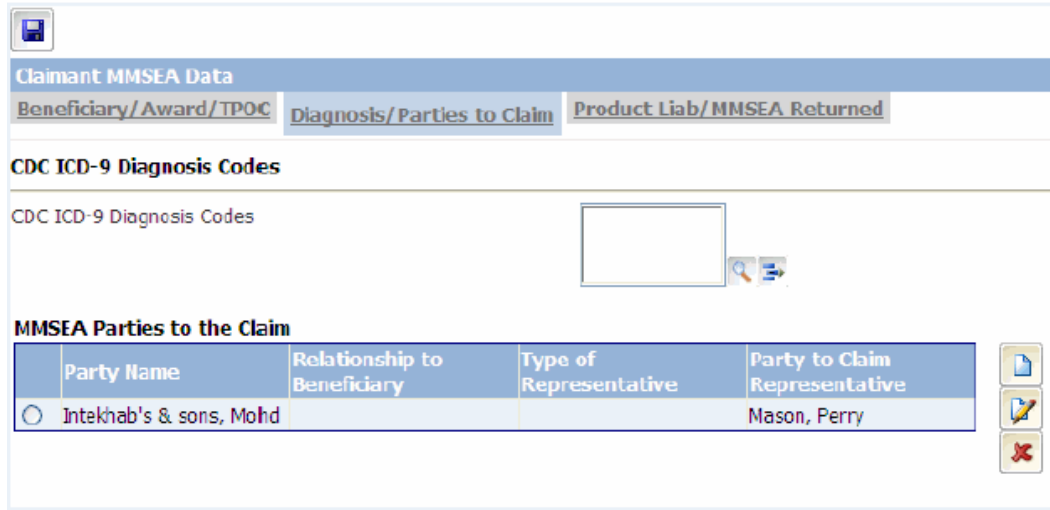
11. In the 'CDC ICD-9 Diagnosis Codes' field, select the ellipsis button to enter the diagnosis codes defined by the Center for Disease Control, not by any jurisdiction or Ingenix.

    The 'MMSEA Parties to the Claim' field displays the MMSEA party to claim record. Customer is responsible for securing the codes and either entering or importing into them into RISKMASTER. More detail on these codes are available at the following Us

To Add New MMSEA Parties to the Claim Record

Before you can add New MMSEA Parties to the claim, you must first create MMSEA Claim Party Entities in People maintenance.

1. On the Claimant MMSEA Data window: Diagnosis/Parties to Claim tab, from the MMSEA Parties to the Claim tab, select the button.

    The MMSEA Party to Claim window opens.

2.   In the Relationship to Beneficiary field, enter the code for relationship to beneficiary type or select the button to search for code.

3.   In the 'Type of Representative' field, enter the representative type or select the button to search for representative type.

4.   In the Party to Claim Representative field, enter the party to claim representative code or the button to search for code.

5.   Select the OK button.

6.   From the Claimant MMSEA Data window, select Product Liab/MMSEA Returned tab.

   The Claimant MMSEA Data window: Product Liab/MMSEA Returned tab opens.

7. In Product Liability Data section, from Product Liability Indicator field, select the [magnifying glass] button to search for the product liability indicator.

8. In the Product Generic Name field, enter the generic name of the product.

9. In the Product Brand Name field, enter the brand name of the product.

10. In the Product Manufacturer field, enter the product manufacturer name.

11. In the Product Alleged Harm field, select the ellipsis button to enter the alleged harms which the product may cause.

12. From the MMSEA Retuned – Applied section, in MSP (Medicare Secondary Payer) Effective Date field, enter the Medicare secondary payer effective date or select date from the calendar.

    > **Note:** The MMSEA Retuned – Applied section will display only by the extraction application's returned file.

13. In the MSP Termination Date field, enter the Medicare secondary payer termination date or select the date from the calendar.

14. In the MSP Type Indicator field, enter the Medicare secondary payer indicator type.

    > **Note :** The value in the Disposition Code field will be set only by the extraction application's returned file(s). This data element is the disposition code returned by Medicare.

15. From the toolbar, select the [save] button.
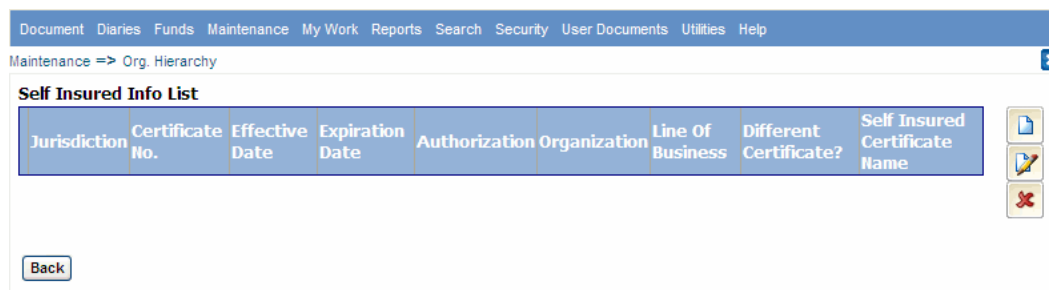
[Tips]

To Update Self Insured Details in the Organization Hierarchy
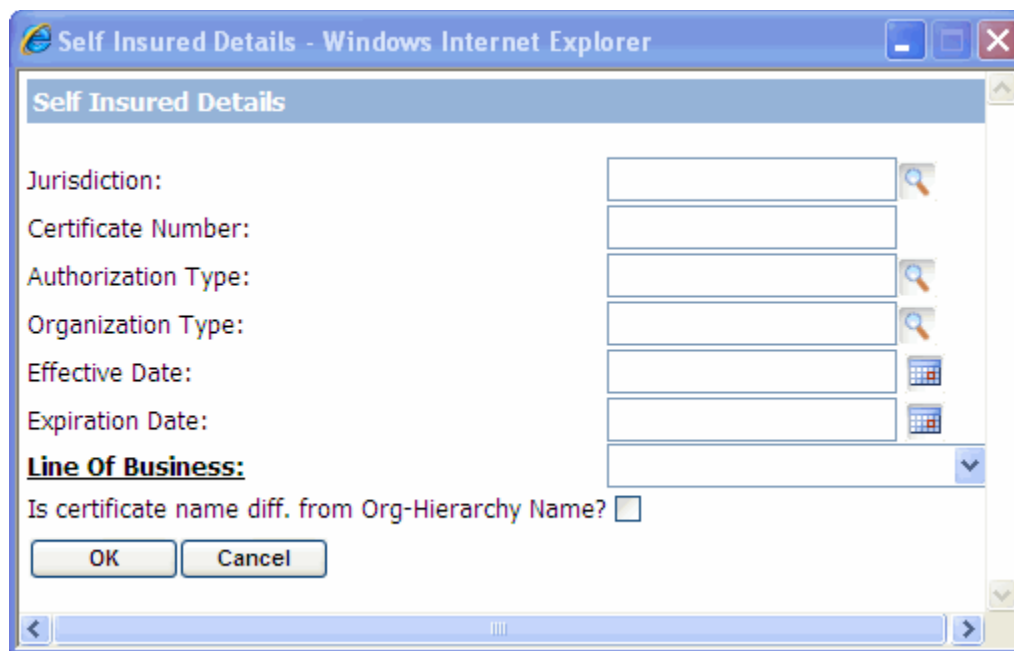
1. From the main menu, select Maintenance.
    The Maintenance menu opens.

2. From the Maintenance menu, choose Org. Hierarchy.

The Org. Hierarchy window opens.

3. From the 'Default Expansion Level for List' drop down list, select Facility.

4. Select an existing Organization Hierarchy facility and select the button.
    The Facility window: Facility tab opens.

5. On the Facility window: Facility tab, select the Self Insured button.
    The Self Insured Info List window opens.

6. To add a new Self Insured Jurisdiction, select the New button.
    The Self Insured Details window opens.

7. In the Jurisdiction field, select the button to select a jurisdiction.

8. In the Certificate Number field, enter the certificate number.

9. In the Authorization Type field, enter the type of authorization or select the button to search for it from the Code Selection window.

10. In the Organization Type field, enter the type of organization of the self Insured or select the button to search for it.

11. In the Effective and Expiration Date fields, enter the effective and expiration dates or select from the calendar.

12. In the Self Insured Authorization Type field, enter the authorization type code or select the button to select it from the Code Selection window.

13. In the Self Insured Organization Type field, enter the Self Insured organization type or select the button to select for a code type.

14. From the Line Of Business drop down list, select the Line of Business as All.

15. Select the 'Is certificate name different from Org-Hierarchy Name?' check box, if certificate name is different from Organization Hierarchy name.

16. Select the OK button.

To Add MMSEA Data in the Entity Window

For Insurers, the change for MMSEA Medicare is on the Entity Maintenance window.

1. From the main menu select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose Entity.
   The Entity Maintenance window opens.

3. From the Type of Entity drop down list, select the entity type as Insurers.

4. In the Name field, enter the entity's name.

5. In the Contact field, enter the entity contact details.

6. In the DBA field, enter the business entity's database administrator's name.

7. In the Abbreviation field, enter short identifying name for the entity.

8. In the Address field, enter the person's address. Enter the City, State, Zip, County and Country in the appropriate fields.

9. In the Tax ID field, enter the business entity's tax identification number.

10. In the Office Phone field, enter the entity's office phone number.

11. In the Alt. Phone field, enter the entity's alternate phone number.

12. In the Fax field, enter the entity's fax number.

13. In the Sex field, enter the employee's gender or select the button to select from the Code Selection window.
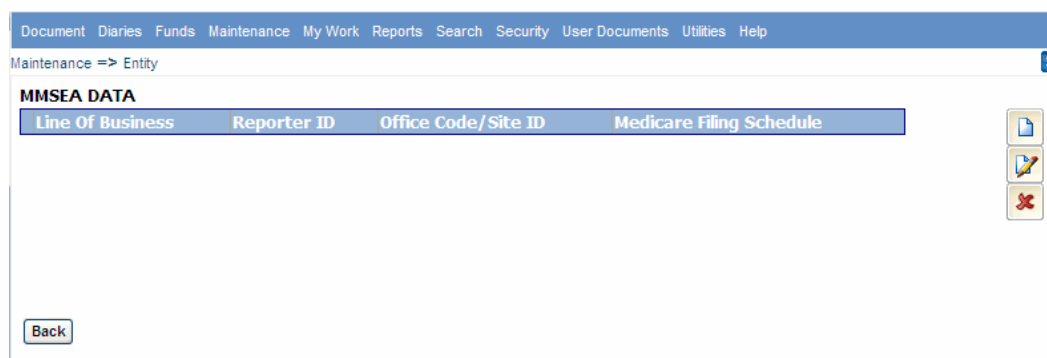
14. In the EMail Type field, enter the type of email system the business entity uses or select the [🔍] button to select from the Code Selection window.

15. In the EMail field, enter the business entity's email address.

16. Select the 1099 Reportable check box, if you have to issue a 1099 report for the entity.

17. Select the 1099 Parent check box, if you want 1099 reportable parent entity.

18. Select the Freeze Payments check box if you want to freeze the payments for the people.

19. In the NPI Number field, enter the national provider identifier number.

20. Select the [💾] button.

21. Select the MMSEA Data button.

    The MMSEA DATA window opens and displays the Line of Business, Reporter ID, Office Code/Site ID and Medicare Filing Schedule.

> **Note:** The Organization Hierarchy Entity can be registered with a different reporter ID and site ID for each Line of Business. The registration will be based on the FEIN of the Organization Hierarchy entity at or above the Self Insured.

22. To add a new MMSEA data, select the button.

    The MMSEA Data Details window opens.

> **Note**: You cannot duplicate a Line Of Business. For example, if you selected Workers Compensation as the LOB and entered a Reporter ID and Office Code / Site ID and saved the record, then, you cannot use the Workers Compensation LOB for another Reporter ID and Office Code. Each LOB is unique. If you select 'All' as the LOB, then you cannot add any other LOB.

23. From the Line Of Business drop down list, select a Line of Business.

24. In the MMSEA Reporter ID field, enter the MMSEA reporter Identification number.

25. In the MMSEA Office Code/Site ID field, enter the MMSEA office code or site identification number.

26. From the Medicare Filing Schedule field, enter the filing schedule for medicare or select the button to select from the Code Selection window.

27. Select the OK button to save and close the window.

28. On the Entity Maintenance window, from the toolbar, select the button.

Diaries

Diaries Overview

Work Process Administration (WPA) in RISKMASTER refers to the diary system. The RISKMASTER diary system offers strong work management capabilities. The diary system messaging function upgrades communication between system users and enables you to send messages and diaries to other users. You can use diaries to create reminders, and to assign, track, and prioritize tasks.

You can use a diary in three typical work scenarios:

- Book marking records or windows for later review or work tasks.

- Routing work in a group based on pre-determined thresholds of time or any other criteria.

- Automatic, best practice business rule checking and diary creation. Best practices provide the business rules and templates with benefits and pro-active triggers.

You can use different types of diaries in RISKMASTER:

- Referenced diary/ To Do List: A readily accessible, organized list of diary tasks and the due dates for these tasks.

    - Book marking records or windows for later review or work tasks.

    - Routing wo

- Quick diary/ Book marking: A quick and easy method of book marking claims, by attaching a claim to the diary To Do List. The Quick diary enables the easy retrieval of a claim record.

- Auto diary/ Best Business Practices: A tool that enables you to choose a pre-designed task option for frequently used claim types, and to automatically assign common tasks.

- Diary Routing: A quick and easy method of sending or assigning a diary task to another user.

- Referenced Email: A simple messaging system between system users.

The main processes in Work Process Administration are:

- Documentation: You can document events, claims, policies and funds using various software products, such as, smart system functions built into business rules, auto diaries and system utilities.

- Administration: You can process and forward records by role and function and use instructions and procedures to further organize work. Use time and event triggers to assist in keeping work on schedule.

- Billing and Forecast: You can provide billing information and forecast using Time on Task. Time on Task enables you to assign the time you want to spend on a diary, or to process bills, or forecast reports using SORTMASTER .

- Reporting: You can generate reports using SORTMASTER.

To Configure Diary List Header

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Diary Config.
   The Diary Header Configuration window opens.

3. Select the check box for the column headers that you want to display on the Diary List window.

> Note: In the respective text boxes, the label for the column headers displays.

4. To modify the column name, change the text in the respective text box field.
5. To restore default column name, select the Default button against the respective text box.
6. Select the Select All button, if you want to display all the columns on the Diary List window.
7. Select the Unselect All button, if you do not want to display any column on the Diary List window.
8. Select the Save Configuration button.

To Create a Diary Task

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, do one of the following:

   - Choose Diary List and select the [image] button.

   - Choose Diary Calender and select Create diary button.

   The Create Diary window opens and a Diary List node displays under Diaries in the navigation tree.

3. From the Assign Diary To list, select a user to assign the task to.
4. In the Task Name field, enter a diary task name.
5. From the Attach To field, select the [image] button to open the Search window and select the claim for which you want to create a diary.
6. In the Due Date/Time field, enter the date and the time when the diary task is due.

Note: You must enter time in the format xx:xx, with a colon : between the hours and minutes. The time you enter defaults to AM.

7. From the Work Activities field, select the [image] button to select work activity codes.
8. Do one of the following:

   - To receive diary reminders on the diary completion due date only, select the Issue Only On Completion Date option.

   - To receive diary reminders at regular intervals, select the Issue Every option.

9. To receive diary reminders at regular intervals, in the Days Until Completion Date field, enter the number of days prior to the completion date to start receiving reminders.

Note: RISKMASTER generates diaries in a series based on the number of days specified until the completion date.

10. From the drop down list, select the level of importance of the diary task, such as Optional, Important, or Required.
11. In the Notes field, enter any additional information.
12. To receive a system notification on completion of the diary, select the Automatic Notification When Completed check box.
13. To automatically send an email notification to the assigned users as soon as the diary is created or updated, select the Notify by Email check box.

    Note: By default this check box is unchecked. You can check it. For email notification to be sent,a valid email address must be set up in the Security Management System for assigned users or for the user creating the diary.

14. Select the Automatic Notification when Late check box to receive a system notification when there is delay in completion of the diary.

> **Note:** Overdue notification will be sent to the user who issued the diary. The overdue diary notifications can be sent via system diary, email notification or both as per user's requirement

15. To export the diary to Microsoft Outlook, select the Export to Schedule+ check box.

16. Select the [image] Save button.

To Work with a Diary

To Create a Quick Diary

1. Search for the claim for which you want to add a quick diary .
   The claim opens in the Claim window.

2. From the toolbar, select the [pencil icon] button.
   The Create Diary window opens with the Assign Diary To field populated with your user ID.

3. Complete the fields on the window as required.

4. To automatically send an email notification to the assigned users as soon as the diary is created or updated, select the Notify by Email check box.

   Note: By default this check box is checked. You can uncheck it. For email notification to be sent,a valid email address must be set up in the Security Management System for assigned users or for the user creating the diary.

5. Select Save.
   Back to top

To Access Attached Records from a Diary

1. From the main menu select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The (User's) Diaries window opens.

3. From the Attached Records column, select the link of the attached record.
   The attached record opens.

   Back to top

To Sort Diary Tasks

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The Diaries window opens.

3. Select a column by which you want to sort the diary tasks with.
   The Diary window displays the diary task sorted by the selected column.

   Back to top

To Mark a Diary as Complete

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The (User's) Diaries window opens.

3. Select the diary you want to mark as complete.
   The Diary Task Completion window opens.

4. In the Completed On field, enter the date on which the diary task was completed.

5. In the Completion Response field, enter your comments.

6. Complete other fields on the window as required.

7. Select the [icon] Save button.

8. Select the [icon] Cancel button to close the window without saving your changes..

To Track Time and Expenses

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The (User's) Diaries window opens.

3. Select the diary you want to mark as complete.
   The Diary Task Completion window opens.

4. To track time and expenses for the diary task, select the Track\Time Expenses For Task check box.
5. In the Start Time field, enter the time when you started the task.
6. In the End Time field, enter the time when you finished the task.
7. In the Total Time Spent field, enter the total number of hours spent on the task.
8. In the Expenses field, enter the expenses associated with the diary task.
9. Select the Automatic Notification When Completed check box if you want to receive a system notification on completion of the diary.
   Note: When you directly create a diary task for the user, the check box is deactivate.

10. Select the [icon] Save button.

11. Select the [icon] Cancel button to close the window without saving your changes.

To Change the Due Date for a Diary

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The (User's) Diaries window opens.

3. Select the diary you want to change the due date for.
4. Select the [icon] Roll button.
   The Roll Diary window opens.

5. In the Roll Date field, enter the new due date.

6. Select the [icon] Roll button.

7. Select the [icon] Cancel button to close the window without saving your changes.

To Send a Diary to Another User

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The (User's) Diaries window opens.

3. Select the diary you want to send to a different user.

4. Select the [icon] Route button.
   The Route Diary window opens.

5. From the Route Diary to list, select the user you want to send the diary to.

   Note: On the Route Diary window, the check box Notify by Email is checked by default, although you can uncheck it. This automatically sends an email notification to the routed user as soon the user is selected to assign the selected diary task to.

6. Select the [icon] Route button.

7. Select the [icon] Cancel button to close the window without saving your changes.

   Back to top

To Review Another User's Diary

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The (User's) Diaries window opens.

3. Select the [icon] Peek button.
   The Diary Peek Target Selection window opens.

4. From the list of Available Users, select the user whose diaries you want to review.

5. Select the [icon] Save button.

6. Select the [icon] Cancel button to close the window without saving your changes.

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To Print Diary Tasks

To Print a Diary Tasks List

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Create.
   The Diaries window opens.

3. Select the Diary List button.
   The Diary List window opens.

4. To print the required diary list, on the Diary List window, select the options , as shown below .

    Diary Selection

Open Diaries Due Today	Select to include only the diaries that are not complete and are due on the current date.
Open Diaries Not Overdue	Select to include only the diaries that are not complete and are due in the future.
Open Diaries Overdue	Select to include only the diaries that are not complete and but are past their due date.
All Open Diaries	Select to include only the diaries that are not complete irrespective of their due date.
Filter by Task Description	Select the check box to filter the diaries by task description.
Task Description	From the drop down list select the task description.
	The Task Description drop down list field gets enabled only when the Filter by Task Description check box is selected.
Open Diaries By Due Date	Select to include only the diaries that are not complete and are due between the dates you specify in the **From** and **To** fields.
Sort By	Select the criteria you want to sort the diary list by. As you select options, a sort priority number will display next to the option. Select the first option to sort by first, and so on.
	The sorting order criteria is maintained on the Diary List window. When you open the Diary List window, the sort order criteria for that particular user is set by default.
	Select the button to open the Print Preview window. Review your list and then choose Print to print the diary list to your default printer.
	Select the button to close the window without printing.

To Print a Diary Task Calendar

1. From the main menu, select Diaries.
    The Diaries menu opens.

2. From the Diaries menu, choose Create.
    The Diaries window opens.

3. Select the button.

    The Diary List (Calendar) window opens.

4. To print the required diary calendar, on the Diary List (Calendar) window, select the options , as shown below.

3.

Diary List Style	• Select **Daily** to print a calendar with only one day per window.
	• Select **Weekly** to print a calendar with one week per window.
	• Select **Monthly** to print a calendar with only one month per window.
Sort Order	Select the order that you want to sort the diaries by.
Diary Date Range	• Select **Today** to include diaries that are due today.
	• Select **Current Week** to include diaries that are due during the current week.
	• Select **Special Date(s)** to include only the diaries that are due between the dates you specify in the **From** and **To** fields.
	• Select **Month/Year** to include diaries that are due during the month and year that you specify.

Select the button to open the Print Preview window. Review your list and then choose Print to print the diary list to your default printer.

Select the button to close the window without printing.

4.
5.   Select Print.

Tips

To Delete a Diary

You can select a diary from the Diaries window and make the diary void , or you can select a completed diary from the Diary History window, and delete the diary task.

To Void a Diary

1. From the main menu, select Diaries.
   The Diaries menu opens.

2. From the Diaries menu, choose Diary List.
   The Diaries window opens.

3. Select the diary you want to delete.
4. Select the Void button.
   The Void Diary window opens.

5. Do one of the following:

   • To void only a selected diary, select the Void the Selected Diary check box.

   • To void all diaries within a date range, clear the Void the Selected Diary check box.

Note: The Void the Selected Diary check box is selected by default.

The fields in the Void Diary by Date frame become active.

6. In the From and To fields, enter the start and end date for the diary tasks you want to void.

7. Select OK.

    A window opens and displays the message, "Are you sure you want to void selected diary?"

8. Select OK.

To Delete Completed Diary Tasks

1. From the main menu, select Diaries.
    The Diaries menu opens.

2. From the Diaries menu, choose Diary History.
    The Diary History window opens and displays all completed diaries.

3. Select a completed diary task and select the Delete button.

    A window opens and displays the message, "Are you sure you want to delete selected diary?"

4. Select OK.

To Generate an Auto Diary

1. From the main menu, select Utilities.
    The Utilities menu opens.

2. From the Utilities menu, choose Tools & Designers.
    The Tools & Designers menu opens.

3. From the Tools & Designers menu, choose Auto Diary Setup.
    The Auto Diary Setup window opens.

4. Select the [ ] button.
    The Auto Diary Creation - Step 1 of 6 (Introduction) window opens and displays " Work Processing Administrator: Best Practices for Risk and Claim Management".

5. Select the Next button.
    The Auto Diary Creation - Step 2 of 6 (Creation Process) window opens.

6. To select the method you want to use to create auto diary definition(s), do one of the following:

    *   Select the Auto Diary wizard option

    *   Select the Best Practices wizard option

7. Select the Next button.
    The appropriate wizard opens based on the option you selected on the Auto Diary Creation - Step 2 of 6 (Creation Process) window.

8. To create a best practices auto diary, complete the fields on the Auto Diary Creation wizard , as shown below .

    Auto Diary Creation wizard: Step 3 of 6

Available Roles	Select the available user roles or group to whom you want to send the best practices diary.
Add	Select to display the selected user roles or groups in the Selected Roles field.

Selected Roles	Displays the selected user roles or group to whom you want to send the best practices diary.
Remove	Select to remove user roles or groups from the Selected Roles field.

Auto Diary Creation wizard: Step 4 of 6

Available Lines of Business	Select the available lines of business for which you want to send the best practices diary.
Add	Select to display the selected lines of business in the Selected Lines of Business field.
Selected Lines of Business	Displays the selected lines of business for which you want to send the best practices diary.
Remove	Select to remove lines of business from the Selected Lines of Business field.

Auto Diary Creation wizard: Step 5 of 6

Available Topics	Select the available topics on which you want to send the best practices diary.
Add	Select to display the selected topics in the Selected Topics field.
Selected Topics	Displays the selected topics on which you want to send the best practices diary.
Do you want to generate an email notification with information for diaries of this type?	Select Yes or No to determine whether you want to generate an e mail notification with information for diaries of this type or not.
	The email notification will be sent to the user whom the diary is assigned.

> If you select 'Yes' option, then you should check that the valid Admin E-mail Address and User's E-mail Address is set in the Security Management System > Set email Options. If either of the email address is invalid, then diaries will be generated from the WPA Auto Diary Setup but email notification will not be sent and Log will be appended in the Log file for the same.

Remove	Select to remove topics from the Selected Topics field.

Auto Diary Creation wizard: Step 6 of 6

Available Pre-Defined Diary(s)	Select the available pre-defined diary(s) that you want to send the best practices diary.

Add	Select to display the selected topics in the Selected Pre-Defined Diary(s) field.
Selected Pre-Defined Diary(s)	Displays the selected pre-defined diary(s) that you want to send the best practices diary.
Remove	Select to remove pre-defined diary(s) from the Selected Pre-Defined Diary(s) field.
Cancel	Select to close the wizard.
Back	Select to move to the previous window in the wizard.
Next	Select to move to the next window in the wizard.
Finish	Select to save the auto diary.

9. To create a user-defined auto diary, complete the fields on the New Auto Diary Creation wizard , as shown below .

8.

New Auto Diary Creation wizard: Step 1 of 6 (Best Practices Scenario)

Which auto diary template do you wish to use?	From the drop down list, select an auto diary template.
What do you want to call this auto diary definition?	Enter a name for your auto diary.
Do not process diaries for records that were created before this date	Enter a date if you do not want to process the new auto diary for RISKMASTER records created before the date.
Due Dates	By default, due date is set to one day after WPA processing. Enter the number of days after WPA processing to set as the new auto diary due day. Enter -1 to set due date to the same day as the WPA processing.
What priority level should be given to this diary?	From the drop down list, select the auto diary priority level.

New Auto Diary Creation wizard: Step 2 of 6 (Business Rule Definition)

Available Filter(s)	From the list, select the filters you want to use to determine records for which RISKMASTER will generate an auto diary.

> If you select a filter such as X Days From Event Date, a pop-up window opens, where you can enter the value of X. For example, if you enter 5, then RISKMASTER will generate an auto diary 5 days after the event date.

	CSC recommends that you restrict the number of selected filters if you do not want RISKMASTER to generate a large number of diaries.
Add	Select to add the selected filter to the Selected Filters field.
Edit	Select a filter and select the button to edit the filter criteria.
Remove	Select to remove a filter from the Selected Filter(s) field.
Selected Filter(s)	Displays the filter(s) you selected.

New Auto Diary Creation wizard: Step 3 of 6 (Workflow Notification)

Check boxes	Select the appropriate check box to determine the users to whom you want to send the auto diary.
User(s)/Group(s)	Select the option to determine whom you want to send the auto diary other than those determined by the check boxes you select.

- Select the **User(s)** option to send the diary to a user or users

- Select the **Group(s)** option to send the diary to a group of users

From the field, select the button to open the Codes Selection window and select the system user(s) or group(s) to whom you want to send the auto diary.

To remove a user(s) or group(s) from the field, select the button.

New Auto Diary Creation wizard: Step 4 of 6 (Escalation Management)

Escalate diary to Highest Level	Select the check box if you want to notify the highest user level if the diary is not completed on the due date.

Who should be notified when this diary's completion is overdue?	Select the option to determine whom you want to notify that the due is overdue for completion. • Select the **Security Management Relationship** option to notify the manager or supervisor of the user to whom the diary is assigned. • Select the **Select Users** option to notify selected users. From the field, select the ▪▪▪ button to open the Codes Selection window and select the system user(s) whom you want to notify. To remove a user(s) from the field, select the ⇥ button.
How many days before notification is sent?	Enter the number of days after the diary completion is overdue, when you want to notify the selected user(s).
Who should the diary be re-routed to when this diary's completion is overdue?	From the field, select the ▪▪▪ button to open the Codes Selection window and select the system user(s) to whom you want to reroute the diary if the diary completion is overdue. To remove a user(s) from the field, select the ⇥ button.
How many days before diary is re-routed?	Enter the number of days after the auto diary completion due date to re-route the diary to the selected user.

New Auto Diary Creation wizard: Step 5 of 6 (Time and Task Management)

What is the total estimated amount of time it should take to complete this task?	Enter the time in hours or minutes estimated to complete the diary task.
Is the time associated with completion of this **type of diary billable?**	Select Yes or No to determine whether the diary task is billable or not.
Do you want diaries of this type exported to	Select Yes or No to determine whether you want to schedule the diary task through Microsoft Outlook.

New Auto Diary Creation wizard: Step 6 of 6 (Instructions/Procedures)

What work activities do you want to associate with this auto diary definition?	Select the [···] button to open the Work Activities window and select the work activities you want to include in your diary.

- On the Work Activities window, from the **Available Activities** field, select an activity and then select the Add button to display the activity in the Selected Activities field.

- Select the **Remove** button to remove the activity from the Selected Activities field.

- In the **Custom** field, enter a user-defined activity.

- Select OK.

Enter any diary related instructions into the box below	Enter any additional comments related to the diary.
Cancel	Select to close the wizard.
Back	Select to move to the previous window in the wizard.
Next	Select to move to the next window in the wizard.
Finish	Select to save the auto diary.

9.
10.   On the last window, select the Finish button.
       RISKMASTER adds the auto diary definition to the Auto Diary Setup window.

11.   To generate the diaries, either run it manually using WPA Auto Diary Processing, or automatically through Event Scheduler.

> Note: WPA is the manual process for producing your auto diaries. Event Scheduler is the system-generated process for producing your auto diaries via a calendar.

View Record Diary

This window displays the diaries for a specific claim or event.

- Search for the claim or event you want to view record diaries for.

To open
- The event opens in the Event window or the claim opens in a Claim window.

- From the toolbar, select the View Record Diaries button [icon].

Field definitions

Active Diaries	Select the check box to display all diaries not marked as completed.

Diaries Due	Enter a date to display only the diaries that are due on or before that date or select the [calendar icon] button to select from a calendar.
Show Diaries For Active Record Only	Select the check box to display all diaries attached to a record not marked as completed.
Show All Diaries Related to this Claim	Select the check box to display all diaries related to this claim not marked as completed.
Refresh	Select to refresh the diary list to reflect any changes you made.
Show Notes	Select the check box to display any additional notes related to the diary under the Task Name .
Show Regarding	Select the check box to display the subject of the diary under the Task Name .The subject displays the Claim Number, Claimant name and Department.
[back arrow icon]	Select the Home button to view your own diaries.
[complete check icon]	Select a diary and then select this Complete button to open the Diary Task Completion window to mark the selected diary as completed.
[edit pencil icon]	Select a diary and then select this Edit button to open the Edit Diary window and edit the selected diary.
[route icon]	Select a diary from this window and then select the Route button to open the Route Diary window. From the list of users, select a different user to assign the selected diary task to and then select the Route button. RISKMASTER will notify the selected user about the diary assignment.
[roll icon]	Select a diary from the list and then select this Roll button to open the Roll Diary window. On the Roll Diary window, enter a new due date for the task and then select the Roll button.
[create icon]	Select to open the Create Diary window and create a new diary entry. Note: When you check the 'Show Diaries For Active Record Only' check box, and select the Create button, the 'Create Diary' pop up window opens and after completing the fields on the pop up window and selecting the Save button, the diary will automatically attach to the active record. When you uncheck the 'Show Diaries For Active Record Only' check box, and select the Create button, the 'Create Diary' pop up window opens and after completing the fields on the pop up window and selecting the Save button, the diary will not be able to get attach to the active record.
[peek icon]	Select to view another user's diary list. Select the Peek button to open the Diary Peek Target Selection window and select the user whose diaries you want to view and then select OK.

Select a diary from the list and then select this Void button to open the Void Diary window. On the Void diary window,

- Select **From** and **To** dates to delete all diaries with due dates that fall between the dates you entered.

- Select **Void** to delete the selected diaries, or **Cancel** to close the window without deleting diaries.

Select to open the [Diary History window](#).

Funds

Funds Management (Payments) Window: Transaction Tab

Use the Transaction tab to enter details about the **payment** and the associated **payee** .

To open	▪ Search for the claim to which you want to add Financials Information.
	▪ From the left navigation tree, under the required claim node, select Financials link.
	▪ From the Reserves window, select the required Financials.
	▪ On the Reserves window, select Add Payments button
	Note: You can also open the window directly from the <u>Funds Management window</u>.

Field definitions

Control Number	Enter a unique ID for a payment. If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create payment transaction.
Collection	Select the check box to create collection transaction.
Void	Select the check box to void the current transaction and set all values to 0.
Stop Pay	Select the checkbox to stop the payment of the transaction.
	Note: This checkbox displays only when the status of the transaction is 'Printed'.
Cleared	Select the check box to mark the current transaction check as cleared.
Claim Number	Enter the claim number for the claim associated with this payment, or select the ⋯ button to search for the claim number.
	Note: If you open the Funds Management window from a Claim window, RISKMASTER automatically displays the claim number.
Manual Check	The check box is displayed as selected when you want to enter a check for the payment manually. You can modify the Check Date and then enter a Check Number. The system will set the status of the check for the payment to printed. .
	Note: This field displays only the transaction is a payment and not a collection..
Final Payment	Select the check box to mark all the reserves on the claim to a closed status.
	Note: The Final Payment check box is visible only if the Payment check box is checked. After the check is printed, the Final Payment check box is disabled.

Detailed Tracking Claimant	**Displays the name of the** claimant. Note**: The Detailed Tracking Claimant field is visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant is selected by default on the "Financials/Reserves" grid, but you can change it, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you cannot change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit the Detailed Tracking Claimant. While editing the payment, you cannot change the Detailed Tracking Claimant because changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.
Transaction Date	Enter the date of the payment or select the ![calendar] button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payee Type	From the drop down list, select the code that best describes the person to whom you are sending the check. If you select Claimant, RISKMASTER automatically enters the claimant information on the tab. Note: This field displays when you select the Payment check box.
Last Name	Enter the payee's last name or select the ![button] button to open the Standard Entity Search window and search for a payee. If you search for a payee, RISKMASTER automatically enters the payee information on the tab.
First Name	Enter the payee's first name.
Payees	Select the button open the code selection window and select payees for the selected payment Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check
··· ('Generate Pay TO The Order Of')	Select the button to open the 'Generate Pay TO The Order Of' window and create the text for the Pay to the Order Of' field. Select the payee phrase needs to be associated with the payee and whether it comes before or after the payee name. You can then edit the pay to the order field. Any alteration to payees (order / addition / deletion) would reset the "Pay to the Order Of" to include all the payees in the payee list, and include the word "And" between each payee name. You can regenerate the payee phrases if needed. The payee and the associated payee phrases are saved to the database.
Tax ID	··· Select the button to open and modify the payee entity in the Entity Maintenance window.

Note: This option displays only when in the Security Management System, the 'Allow Edit of Entity Tax ID' check box is selected under Funds Management.

Select the button to open and modify the tax ID of the payee in the Edit Payee Tax ID window.

If a Tax ID is already entered for the entity, the tax ID is populated in the Payee TaX ID field.

Enter the new tax ID number and select the Save button

Note: This option displays only when in the Security Management System, the 'Allow Payee Lookup With Tax ID ' check box is selected under Funds Management..

Address Enter the payee's mailing address. Enter the City, State, and Zip in the appropriate fields.

Note: If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payee's record in the database

Select the button to view the multiple addresses attached to payee in a code lookup window.

Enclosure Select the check box if you want to include other documents with the check. Selecting this option prints "Enc" on the check.

Combined Payment? This check box is selected if the payment is a combined payment and is to be paid to a set of payees.

Auto Check? Select the check box if you want checks to be automatically issued for this payment.

Include Claimant in Payee Select the check box to make the payment to the claimant along with any other payee you selected.

Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.

EFT Payment This check box is selected if the payment needs to be made through electronic funds transfer.

Type of Bill

Enter the type of bill for which medical payments are generated for bill review fees or select the button to select from the Code Selection window.

> Note: The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.

Distribution Type

Select the lookup button to select the disbursement method for the check while adding a manual payment or an automatic transaction.

1. Regular Mail

2. Express Mail

3. Wire Transfer

4. FX Wires

5. EFT

6. Manual

Dormancy Status

Displays the dormancy status of the unclaimed or escheat payment.

Check Date

Enter the date that will print on the check or select the button to select from a calendar.

Check Status

Enter the code that best describes the status of the check or select the button to select from the Code Selection window. If you select Hold the payment will not print.

Check Memo

Enter text you want to print on the check.

Check Number

Enter the check number that will print on the check.

Transaction Notes

Select the button to open the RISKMASTER Editor and enter additional notes about the transaction.

Memo Phrase

From the drop down select the phrase which you want to display in the check memo. Once you select a check memo phrase, the code description displays in the Check Memo field. You can edit the text as needed..

Void Reason Code

From the dropdown list select the code that best describes the reason for voiding a check. Once you select a code in this drop down the code description will be displayed to the Void Check Reason field . You can then edit this text as needed.

> Note: When on the Payment Parameter Setup window: Check Options tab, the Check Void Reason checkbox is selected, then a warning message is displayed prompting to enter a reason for check void. You can only enter a Voic Check reason when Void check box is selected on the Funds window.

Currency Type

Enter the currency type or select the search button [🔍] to select from the Code Selection window.

> Note: By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Void Check Reason

Select the [icon] button to open the RISKMASTER Editor and enter the reason for voiding the transaction.

> Note: The field will be visible only when on the Payment Parameter Setup window: Check Options tab, the Check Void Reason check box is selected.

Select the button to open the Print Single Check window, complete the fields and select the Print button to print a single check for the payment.

Select the button to open the Payee Experience window and view the number of payments, total amount of payments, and average amount of each payment made to the payee.

> Note: This link is displays, if you have previously made payments to this payee.

Select the button to load the claim.

Note: For the records where funds are searched from the Search menu, the claim is loaded in the MDI tree. From this funds window you can go back to the claim window.

Select the button to go back to Reserves window.

Select the button to go to Payment History window.

Select the button to preview the check for single current transaction.

Note: The Print Preview button appears on the toolbar before the check is printed for a transaction. You can view the check preview of the transaction before check printing. Once the check is printed for a transaction, the Print Preview button no longer displays on the toolbar.

Select the button to view the clone image of a printed check.

Note: Once the check for a transaction is printed, this Clone Printed Check button appears on the toolbar. You can view the check image even after the check is printed. The view contains all the checks in case the transaction is part of a rolled up check.

Select the button to open the Enhanced Notes for the associated parent claim record.

To open   On the Funds window, select LSS Fund Info.

Field definitions

LSS Invoice Requested Amount   Displays the reserve account for LSS invoice request.

LSS Approved Amount   Displays the amount approved by LSS.

LSS Invoice Final Date   Displays the final date of LSS invoice.

LSS Pay Discount   Displays LSS Pay discount amount.

Funds Window: Transaction Details Tab

To open   On the Funds window, select Transaction Details tab.

Field definitions

Transaction Type   Displays the reserve account to which RISKMASTER will apply this payment.

Reserve Type   Displays the reserve type for the reserve account.

Amount   Displays the payment amount.

From Date   Displays the date from which the service starts. For example, for a hospital stay, displays the admission date.

To Date   Displays the date on which the service ends. For example, for a hospital stay, displays the discharge date

GL. Account   Displays the general ledger fund.

Inv. Number   Displays the invoice number or any other identifying number that displays on the bill.

Inv. Amout   Displays the billing amount that displays on the bill.

Inv. By   Displays the name of the payee who sent you the bill in response to which you are making the transaction.

Policy   Displays the name of policy.

Unit	Displays the unit.
Coverage Type	Displays the type of coverage for the reserve account.
First & Final Payment	The First And Final Payment check box is selected if this is a First And Final Payment, which means the payment was created without setting a reserve beforehand. The reserve was created on the fly when you created the payment, .

> Note: This check box will be enabled when the First and Final Payment option is selected on the Security Management System.

Currency Type	Displays the type of currency.

> Note: If the payment is not associated with a claim the Currency Type will default to Base Currency.

Total	Displays the total transaction amount.
	Select the button to open the Funds Split Detail window and enter a collection or payment.
	From the Transaction Details for Funds Payments section, select a transaction and select the button to open the Funds Split Detail window in edit mode.
	From the Transaction Details for Funds Payments section, select a transaction and select the button to delete the transaction detail.
Time and Expense	Select to open the Time and Expenses window.
Bill Review	Select to open the Bill Review System window.
Print EOB	Select to view in .pdf format and print the Explanation of Benefits report.
Print Check	Select to open the Print Single Check window.

Print Single Check Window

To open

From the Funds window, select the [icon] Print Check button.

Field definitions

From Account	Displays the bank account number from which you want to make the payment .

Check Stock	Displays the check stock.
	From the drop down list, you can select a different check stock.
Check Number	Displays the check number.
	You can enter a different check number.
Check Date	Displays the date of check issue.
	You can enter a different check date or select from the calendar.
Print	Select to print the check.
Cancel	Select to close the window without printing the check.

Bill Review System Window: Calculate Tab

To open	From the Bill Review System window, select the Calculate tab.

Field definitions

Amount Billed	
	Enter the amount billed for the service rendered or select the [🔍] button to select from the Code Selection window.
Calculate Amount Allowed	Select the button to calculate the amount you are allowed to pay for the service rendered.
	Note: RISKMASTER calculates the amount based on the modifier code for the selected billing code.
Amount Allowed	Displays the amount you are allowed to pay for the service rendered.
Amount Saved	Displays any amount that is saved if the amount allowed is less than the amount billed.
Reduce Amount To Pay by Percentage	Enter the percentage by which you want to reduce the Amount Allowed for payment.
Reduce	Select the button to calculate the amount to pay based on the percentage amount that you want to reduce from the amount allowed.
Reduce Amount to Pay By Fixed Amount	Enter the fixed amount by which you want to reduce the Amount Allowed for payment.
	Note: When you enter a percentage and select the Reduce button, this field displays the amount based on the calculations on the amount allowed.
Reduce	Select the button to calculate the amount to pay based on the fixed amount that you want to reduce from the amount allowed.
Amount to Pay	Displays the final amount to pay based on the calculations.

Explanation of Benefit(s)	Enter the code that best describes the Explanation of Benefit(s) that you want to print or select the [magnifying glass icon] button to select from the Code Selection window.
Return	Select to open the [Bill Review System window: Bill Item Detail tab](#).
Cancel	Select to close the Bill Review System window without saving your changes.

Bill Review System Window: Dates, Zip and Fee Table Tab

To open   From the Bill Review System window, select the Dates, Zip and Fee Table tab.

Field definitions

From Date and To Date	Enter the date range to generate a bill for and select the next button.
Table	From the drop down list, select the fee table you want to use.
	Note: The Table drop down list displays after you enter the From and To Dates and select the next button.
Zip	Displays the zip code of the payee address.
	Note: The zip code of the payee address displays after you select the fee table from the drop down list and select the next button.
Bill Type	Enter the bill type or select the [magnifying glass icon] button to select the code from the Code Selection window.
Next	Select to open the next window.
Cancel	Select to close the Bill Review System window without saving your changes.

Bill Review System Window: Bill Item Detail Tab

To open   From the [Bill Review System window: Selected Dates, Zip and Fee Table tab](#), select the Next button.

Field definitions

Place of Service	Enter the place where the service was rendered or select the [magnifying glass icon] button to select from the Code Selection window.
FL License #	Enter the physician license number.
Type of Service	Enter the type of service rendered by the physician or select the [magnifying glass icon] button to select from the Code Selection window.

Physician look-up	Enter the physician look up type or select the ⋯ button to search for the physician look up type.
Revenue Code	Enter the revenue code.
Ref. No	Enter the reference number of the bill item.
Transaction Type	Enter the transaction type or select the 🔍 button to select from the Code Selection window.
Modifier Code(s)	Enter the modifier code or select the 🔍 button to select from the Code Selection window.
	Note: Modifiers are codes you can use to calculate a specified percentage increase or decrease in the payment for an item.
ICD 9 Diagnosis (Codes)	Enter the ICD 9 diagnosis code or select the 🔍 button to select from the Code Selection window.
ICD 10 Diagnosis (Codes)	Enter the ICD 10 diagnosis code or select the 🔍 button to select from the Code Selection window.
GL Account	From the drop down list, select the General Ledger account from which you want to make the payments.
CPT	Enter the Physicians' Current Procedural Terminology (CPT) code.
NDC-Number Primary	Enter the physician pharmacy National Drug Code (NDC).
NDC-Number Secondary	Enter the physician pharmacy National Drug Code when filing medical bills of pharmacy.
Description	Enter billing code related description.
Billing Code	Enter the billing code or select the 🔍 button to select from the Code Selection window.
Units Billed	Enter the number of units billed.
Billed Units	Select the option for the billed units measurement, such as Units, Minutes or Others.
Invoiced By	Enter the name of the user creating the invoice .
Invoice Number	Enter an invoice number.

Invoice Date	Enter the invoice date.
Return	Select to open the [Bill Review System window: Selected Dates, Zip and Fee Table tab](#).
Cancel	Select to close the Bill Review System window without saving your changes.

Custom Payment Notification Window

To open
- From the main menu, select Funds.
- From the Funds menu, select Custom Payment Notification.

Field definitions

Show Payments Due By	Select the option to select the time period for which you want to view pending payments.
	• **End of Month** - Select the option to view payments which are due by end of current month.
	• **End of Week** - Select the option to view payments which are due by end of the current week.
Show Payments in Date Range	Select the option to select the period for which you want to view the pending payments.
From and To	Enter the from and to dates for the date range for which you want to view the pending payments.
Total Amount To Pay	Displays the total amount of pending payments.
Refresh	Select to update the list that displays.
Print	Select to print the list of pending payments.

Funds Management Window

Use the Funds Management window to enter details about payments, time and expense details, and bill reviews and to print checks and EOB reports.

To open
- From the main menu, select Funds.
- From the Funds menu, select the Transaction tab.

Field definitions

Control Number	Enter a unique ID for a payment. If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.

Payment	Select the check box to create payment transaction.
Collection	Select the check box to create collection transaction.
Void	Select the check box to void the current transaction and set all values to 0.
Cleared	Select the check box to mark the current transaction check as cleared.
Claim Number	Enter the claim number for the claim associated with this payment, or select the ••• button to search for the claim number.
	Note: If you open the Funds Management window from a Claim window, RISKMASTER automatically displays the claim number.
Final Payment	Select the check box to mark all the reserves on the claim to a closed status.
	Note: The Final Payment check box is visible only if the Payment check box is checked. After the check is printed, the Final Payment check box is disabled.
Detailed Tracking Claimant	**Displays the name of the** claimant.
	Note**: The Detailed Tracking Claimant field is visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant is selected by default on the "Financials/Reserves" grid, but you can change it, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you cannot change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit the Detailed Tracking Claimant. While editing the payment, you cannot change the Detailed Tracking Claimant because changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.
Transaction Date	Enter the date of the payment or select the 🗓 button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payee Type	From the drop down list, select the code that best describes the person to whom you are sending the check.
	If you select Claimant, RISKMASTER automatically enters the claimant information on the tab.
	Note: This field displays when you select the Payment check box.
Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction
	The available options in the field are 'attorney for' and 'as guardian of'.
	The first payee will not have a Payee List Phrase.
	Note: This field is enabled only when there are multiple payees for the transaction.

Last Name	Enter the payee's last name or select the ••• button to open the Standard Entity Search window and search for a payee.
	If you search for a payee, RISKMASTER automatically enters the payee information on the tab.
First Name	Enter the payee's first name.
Payees	Select the button open the code selection window and select payees for the selected payment
	Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Tax ID	Enter the payee's tax identification number.
Address	Enter the payee's mailing address. Enter the City, State, and Zip in the appropriate fields.
	Note: If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payee's record in the database .
Enclosure	Select the check box if you want to include other documents with the check. Selecting this option prints "Enc" on the check.
Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
Auto Check?	Select the check box if you want checks to be automatically issued for this payment.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
	Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
EFT Payment	This check box is selected if the payment needs to be made through electronic funds transfer.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.
Type of Bill	Enter the type of bill for which medical payments are generated for bill review fees or select the 🔍 button to select from the Code Selection window.
	Note: The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.

Check Date

Enter the date that will print on the check or select the ☷ button to select from a calendar.

Check Status

Enter the code that best describes the status of the check or select the 🔍 button to select from the Code Selection window. If you select Hold the payment will not print.

Check Memo

Enter text you want to print on the check.

Check Number

Enter the check number that will print on the check.

Transaction Notes

Select the 📝 button to open the RISKMASTER Editor and enter additional notes about the transaction.

Currency Type

Enter the currency type or select the search button 🔍 to select from the Code Selection window.

> Note: By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Void Check Reason

Select the 📝 button to open the RISKMASTER Editor and enter the reason for voiding the transaction.

> Note: The field will be visible only when on the Payment Parameter Setup window: Check Options tab, the Check Void Reason check box is selected.

Select the button to open the Print Single Check window, complete the fields and select the Print button to print a single check for the payment.

Select the button to open the Payee Experience window and view the number of payments, total amount of payments, and average amount of each payment made to the payee.

> Note: This link is displays, if you have previously made payments to this payee.

Select the button to load the claim.

Note: For the records where funds are searched from the Search menu, the claim is loaded in the MDI tree. From this funds window you can go back to the claim window.

Select the button to go back to Reserves window.

Select the button to go to Payment History window.

Select the button to preview the check for single current transaction.

Note: The Print Preview button appears on the toolbar before the check is printed for a transaction. You can view the check preview of the transaction before check printing. Once the check is printed for a transaction, the Print Preview button no longer displays on the toolbar.

Select the button to view the clone image of a printed check.

Note: Once the check for a transaction is printed, this Clone Printed Check button appears on the toolbar. You can view the check image even after the check is printed. The view contains all the checks in case the transaction is part of a rolled up check.

Select the button to open the Enhanced Notes for the associated parent claim record.

To View Custom Payment Notification

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Custom Payment Notification.
   A Custom Payment Notification window opens and displays a list of checks that you need to print. A Custom Payment Notification node displays in the left navigation tree

Note: (Number) displays the actual number of total checks that you need to print.

3. Do one of the following:

   • To view payments due by the end of the current week, select the Show Payments Due By option and then select the End of Week option.

   • To view payments due by the end of the current month, select the Show Payments Due By option and then select the End of Month option.

   • To view pending payments for a period, select the Show Payments in Due Range option, and enter the date range in the From and To fields.

4. Select Refresh.
   The table displays the check details based on the time period that you select.

5. To print the details that display, select Print.

Tips

To Add a Collection

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu , choose Transaction.
   The Funds window opens and a Funds Transaction node displays in the left navigation tree.

3. On the Funds window, select the Collection check box.
4. Select and complete the fields in the Transaction tab , as shown below .

Control Number	Enter a unique ID for a payment . If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create payment transaction. **Note:** You can only select either Payment or Collection check box.
Collection	Select the check box to create collection transaction.
Claim Number	Enter the claim number for the claim associated with this payment, or select the search button to search for the claim number. If you open this window from a Claim window, RISKMASTER automatically displays the claim number.
Final Payment	Select the check box to mark all the reserves on the claim to a closed status. The Final Payment check box is visible only if the Payment check box is checked. After the check is printed, the Final Payment check box is disabled.
Void	Select the check box to void the current transaction and set all values to 0.
Cleared	Select the check box to mark the current transaction check as cleared.
Transaction Date	Enter the date of the payment or select the button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payor Type	From the drop down list, select the code that best describes the person receiving the check.
Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction The available options in the field are 'attorney for' and 'as guardian of'. The first payee will not have a Payee List Phrase. Note: This field is enabled only when there are multiple payees for the transaction.
Last Name	Enter the payor's last name or select the search button to search for a payor. If you search for a payor, RISKMASTER automatically enters the payor information on the tab.
OFAC Check	Select to open the Specially Designated Nationals List Check window and view if the payor is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.
Payees	Select the button open the code selection window and select payees for the selected payment

Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.

First Name Enter payor's first name.

Pay To The Order Of Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.

Tax ID Enter payor's tax identification number.

Address Enter payor's mailing address, enter the City, State, and Zip in the appropriate fields.

If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payor's record in the database.

Enclosure Select the check box if you want to include other documents with the check.

When you select the check box, "Enc" prints on the check.

Auto Check? Select the check box if you want bills to be automatically issued for this collection.

Include Claimant in payee Select the check box to make the payment to the claimant along with any other payor you selected.

Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.

Combined Payment? This check box is selected if the payment is a combined payment and is to be paid to a set of payees.

Dormancy Status Displays the dormancy status of the unclaimed or escheat payment.

EFT Payment This check box is selected if the payment needs to be made through electronic funds transfer.

Type of Bill Enter the type of bill for which medical payments are generated for bill review fees or select the 🔍 button to select from the Code Selection window.

The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.

Date Enter the date on which you are adding the collection or select the 📅 button to select from a calendar.

Check Date Enter the date that will print on the check or select the 📅 button to select from a calendar.

Check Memo	Enter text you want to print on the check.
Deposit Number	Enter the deposit number for the collection.
Transaction Notes	Enter any additional comments or select the ☑ button to open the RISKMASTER Editor and enter additional notes about the transaction.
Currency Type	Enter the currency type or select the search button 🔍 to select from the Code Selection window.

By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Void Check Reason	Enter a valid reason for marking the check as void or select the ☑ button to open the RISKMASTER Editor and enter the reason for marking the check as void.

The Field will be visible only if Check Void Reason check box is selected in Utilities.

Detailed Tracking Claimant	**Displays the name of the** claimant.

Note: **The Detailed Tracking Claimant field is visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant is selected by default on the "Financials/Reserves" grid, but you can change it, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you cannot change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit the Detailed Tracking Claimant. While editing the payment, you cannot change the Detailed Tracking Claimant because changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.

5. To add transaction details, From the Transaction Details tab,select the Add Transaction button.
The Funds Split Detail window opens.

6. Complete the fields on the Funds Split Detail window , a s shown below .

Currency Type	...ys the type of currency.

If the payment is not associated with a claim the currency type will default to Base Currency.

Transaction Type	Enter the reserve account to which you want to apply the transaction, or select the 🔍 button to select from the Code Selection window.
Reserve Type	Displays the reserve type for the reserve account.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
Reserve Balance(Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.

<table>
<tr><td></td><td>The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance define in the claim currency.</td></tr>
</table>

Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the [🔍] button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the buttons to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoiced Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
First And Final Payment	The First And Final Payment check box is checked automatically and read only. This option lets you create a First And Final Payment, which means you can make a payment without setting a reserve beforehand. When you create the payment, the reserve is created on the fly.
	Note: When you open the Funds Split Details window from the claim navigation tree without selecting a reserve from the financial/reserve grid, the 'First & Final Payment' check box is selected automatically and is read only. If you do not want this check box to be selected, open the Funds window (Funds menu > transaction) and search for a claim, and then uncheck the 'first & Final Payment' check box.
Policy	From the Policy drop down list, select the name of policy.

	The Policy field is only visible when **the Use Carrier Claim Settings check box is** selected in Utilities.

Unit	From the Unit drop down list, select the generic unit.

	The Unit field is only visible when **the Use Carrier Claim Settings check box is** selected.

Coverage	Enter the type of coverage for the reserve account or select the [🔍] button to select from the Code

	The Coverage field is only visible when **the Use Carrier Claim Settings check box is** selected..

7. Select OK.

The Transaction Detail tab on the <u>Funds Management window</u> displays the details of the payment .

Tips

To Work with Transaction Details

To edit transaction details

1. Search for the funds transaction for which you want to edit transaction details.
   The Funds window opens.

2. On the Transaction Detail tab, from the Transaction Details for Funds Payments section, select the option next to the transaction type that you want to edit.

3. Select the Edit button.
   The Funds Split Details window opens.

4. Edit the information in the fields.

5. Select the OK button.
   On the Funds Management window, the Transaction tab displays the edited information.

To delete a transaction detail

1. Search for the funds transaction for which you want to delete transaction details.
   The Funds window opens.

2. On the Transaction Detail tab, from the Transaction Details for Funds Payments section, select the option next to the transaction type that you want to Delete

3. Select the [×] button.
   RISKMASTER deletes the selected transaction detail.

To Calculate a Bill

1. Search for the claim you want to calculate the bill payments for.
2. From the left navigation tree, select the Financials link, under the required claim node.
   The Reserves window opens.

3. Select the Payment History button.
   The Payment History window opens and displays a list of payments.

4. Select a link to open the Funds window.
5. From the Funds window, select the BRS Transaction Detail tab.

6. From the BRS Transaction Detail tab, select the [ ] button.
   The Bill Review System window opens.

7. In the From Date and To Date fields enter the date range to generate a bill for.
8. Select Next.
9. From the Table drop down list, select the fee schedule you want to use to calculate the bill amount.
10. Select Next.
    The Bill Review System Setup opens.

11. Complete the fields on the Bill Item Detail tab.
12. Complete the fields on the Calculate tab.
13. Complete the fields on the Bill Item Detail tab , as shown below.

Place of Service

Enter the place where the service was rendered or select the [icon] button to select from the Code Selection window.

FL License #

Enter the physician license number.

Type of Service

Enter the type of service rendered by the physician or select the [icon] button to select from the Code Selection window.

Physician look-up

Enter the physician look up type or select the [icon] button to search for the physician look up type.

Revenue Code

Enter the revenue code.

Ref. No

Enter the reference number of the bill item.

Transaction Type

Enter the transaction type or select the [icon] button to select from the Code Selection window.

Modifier Code(s)

Enter the modifier code or select the [icon] button to select from the Code Selection window.

Modifiers are codes you can use to calculate a specified percentage increase or decrease in the payment for an item.

Diagnosis (Codes)

Enter the diagnosis code or select the [icon] button to select from the Code Selection window.

GL Account

From the drop down list, select the General Ledger account from which you want to make the payments.

CPT

Enter the Physicians' Current Procedural Terminology (CPT) code.

Physician Pharmacy NDC

Enter the physician pharmacy National Drug Code (NDC).

Billing Code

Enter the billing code or select the [icon] button to select from the Code Selection window.

Units Billed

Enter the number of units billed.

Billed Units

Select the option for the billed units measurement, such as Units, Minutes or Others.

      Invoiced By   Enter the name of the user creating the invoice .

      Invoice Number   Enter an invoice number.

      Invoice Date   Enter the invoice date.

      Return   Select to open the <u>Bill Review System window: Selected Dates, Zip and Fee Table tab</u> .

      Cancel   Select to close the Bill Review System window without saving your changes.

14. Complete the fields on the <u>Calculate tab</u> , as shown below.

    Amount Billed

               Enter the amount billed for the service rendered or select the [🔍] button to select from the Code Selection window.

    Calculate Amount Allowed   Select the button to calculate the amount you are allowed to pay for the service rendered.

               RISKMASTER calculates the amount based on the modifier code for the selected billing code.

    Amount Allowed   Displays the amount you are allowed to pay for the service rendered.

    Amount Saved   Displays any amount that is saved if the amount allowed is less than the amount billed.

    Reduce Amount To Pay by Percentage   Enter the percentage by which you want to reduce the Amount Allowed for payment.

    Reduce   Select the button to calculate the amount to pay based on the percentage amount that you want to reduce from the amount allowed.

    Reduce Amount to Pay By Fixed Amount   Enter the fixed amount by which you want to reduce the Amount Allowed for payment.

               When you enter a percentage and select the Reduce button, this field displays the amount based on the calculations on the amount allowed.

    Reduce   Select the button to calculate the amount to pay based on the fixed amount that you want to reduce from the amount allowed.

    Amount to Pay   Displays the final amount to pay based on the calculations.

    Explanation of Benefit(s)   Enter the code that best describes the Explanation of Benefit(s) that you want to print or select the [🔍] button to select from the Code Selection window.

15. Select Return.

    The Funds Management window opens with your Transaction detail added.

To Print a Single Check

1. Search for the payment for which you want to print a check.
    The Funds window opens for the payment that you select.

2. Select the Print Check button.
    The [Print Check window](#) opens and displays the account and check details associated with the payment , as shown below .

From Account	Displays the bank account number, from which you want to make the payment.
Check Stock	Displays the check stock. From the drop down list, you can select a different check stock.
Check Number	Displays the check number. You can enter a different check number.
Check Date	Displays the date of check issue. You can enter a different check date or select from the calendar.

3. To change the check details, edit the information in the fields.
4. Select the Print button.

To Select Funds Transaction Type

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, select Transaction .
    The Funds window opens.

3. Do one of the following:

    *   To add a payment, on the Funds window, select the Payment check box.

    *   To add a collection, on the Funds window, select the Collection check box.

To Add a Payment

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, choose Transaction.
    The Funds window opens.

3. On the Funds window, select the Payment check box.

4. Select and complete the fields in the Transaction tab , as shown below .

Control Number	Enter a unique ID for a payment. If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create a payment transaction.
	ou can only select either Payment or Collection check box.
Void	Select the check box to void the current transaction and set all values to 0.

Collection	Select the check box to create collection transaction.
Cleared	Select the check box to mark the current transaction check as cleared.
Claim Number	Enter the claim number for the claim associated with this payment, or select the ⋯ button to search for the claim number.
	you open the Funds Management window from a Claim window, RISKMASTER automatically displays the claim number.
Final Payment	Select the check box to mark all the reserves on the claim to a closed status.
	he Final Payment check box is visible only if the Payment check box is checked. After the check is printed, the Final Payment check box is disabled.
Transaction Date	Enter the date of the payment or select the 🔲 button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payee Type	From the drop down list, select the code that best describes the person to whom you are sending the check. If you select Claimant , RISKMASTER automatically enters the claimant information on the tab.
Void Reason Code	From the dropdown list select the code that best describes the reason for voiding a check. Once you select a code in this drop down the code description will be displayed to the Void Check Reason field . You can then edit this text as needed.
Memo Phrase	From the drop down select the phrase which you want to display in the check memo. Once you select a check memo phrase, the code description displays in the Check Memo field. You can edit the text as needed..
Last Name	Enter the payee's last name or select the ⋯ button to open the Standard Entity Search window and search for a payee.
	you select a payee from the search results, RISKMASTER automatically enters the payee information in the fields.
OFAC Check	Select to open the Specially Designated Nationals List Check window and view if the payee is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.

Manual Check		Select the check box enter a check for the payment manually. You can modify the Check Date and then enter a Check Number.
		The system will set the status of the check for the payment to printed. .
First Name		Enter the payee's first name.
Payees	...	Select the button open the code selection window and select payees for the selected payment
		Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
		Select the button open and modify the payee entity in the Entity Maintenance window.
		Note: This option displays only when in the Security Management System, the 'Allow Edit of Payee Entity' check box is selected under Funds Management.
Pay TO The Order Of		Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check
... **(Generate Payee Phrase)**		Select the button to open the 'Generate Pay TO The Order Of' window and create the text for the Pay to the Order Of' field. Select the payee phrase needs to be associated with the payee and whether it comes before or after the payee name. You can then edit the pay to the order field. .
Tax ID		Enter the payee's Tax identification number.
Address		e payee's mailing address. Enter the City, State, and Zip in the appropriate fields.
		RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payee's record in the database .
	...	Select the button to view the multiple addresses attached to payee in a code lookup window
Enclosure		Select the check box if you want to include other documents with the check. Selecting this option prints "Enc" on the check.
Auto Check?		Select the check box if you want checks to be automatically issued for this payment.

Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
EFT Payment	This check box is automatically enabled and selected when you select an EFT bank from the Bank Account drop down field. You need to manually uncheck the check box if you want to create a non EFT payment using an EFT bank account. If the payee does not have banking information associated with them the system will prompt for that information.
Type of Bill	Enter the type of bill for which medical payments are generated for bill review fees or select the 🔍 button to select from the Code Selection window.
	he field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
	Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
Check Status	Enter the code that best describes the status of the check or select the 🔍 button to select from the Codes Selection window. If you select Hold the payment will not print.
Check Date	Enter the date that will print on the check or select the 📅 button to select from a calendar.
Check Number	Enter the check number that will print on the check.
Check Memo	Enter text you want to print on the check.
Transaction Notes	Enter any additional comments or select the 📝 button to open the RISKMASTER Editor and enter additional notes about the transaction.
Currency Type	Enter the currency type or select the search button 🔍 to select from the Code Selection window.
	y default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.
Void Check Reason	Enter a valid reason for marking the check as void or select the 📝 button to open the RISKMASTER Editor and enter the reason for marking the check as void.

he Field will be visible only if Check Void Reason check box is selected in Utilities.

Detailed Tracking Claimant	Displays the name of the claimant.
	Note: **The Detailed Tracking Claimant field is visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant is selected by default on the "Financials/Reserves" grid, but you can change it, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you cannot change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit the Detailed Tracking Claimant. While editing the payment, you cannot change the Detailed Tracking Claimant because changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.

5. To add transaction details, on the Transaction Details tab, select the Add Transaction button.

   The Funds Split Detail window opens.

6. Complete the fields on the Funds Split Detail window , as shown below .

Currency Type	Displays the type of currency.
	If the payment is not associated with a claim the currency type will default to Base Currency.
First And Final Payment	The First And Final Payment check box is checked automatically and read only. This option lets you create a First And Final Payment, which means you can make a payment without setting a reserve beforehand. When you create the payment, the reserve is created on the fly.
	Note: When you open the Funds Split Details window from the claim navigation tree without selecting a reserve from the financial/reserve grid, the 'First & Final Payment' check box is selected automatically and is read only. If you do not want this check box to be selected, open the Funds window (Funds menu > transaction) and search for a claim, and then uncheck the 'first & Final Payment' check box.
Policy	From the Policy drop down list, select the name of policy.
	The Policy field is only visible when **the Use Carrier Claim Settings check box is** selected in Utilities.
Unit	From the Unit drop down list, select the generic unit.
	The Unit field is only visible when **the Use Carrier Claim Settings check box is** selected.
Coverage	Enter the type of coverage for the reserve account or select the 🔍 button to select from the Code Selection window.
	The Coverage field is only visible when **the Use Carrier Claim Settings check box is** selected..

Transaction Type	Enter the reserve account to which you want to apply the transaction, or select the [🔍] button to select from the Code Selection window.
Reserve Type	Displays the reserve type for the reserve account.
	This field is read-only by default. To be able to modify the reserve type in this field, in RISKMASTER Utilities, on the General System Parameter Setup window, select the Use Res Type to Filter Trans Type check box.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
	Note: The Reserve Balance is shown as zero for first and final payment. For payments other than first and final payment, the Reserve Balance is the actual reserve balance for the selected reserve.
Reserve Balance (Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.
	The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.
Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the [🔍] button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the [📅] button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.

7. Select OK.
    The Transaction Detail tab on the Funds window displays the payment details.

Funds Management Overview

Use RISKMASTER Funds Management to manage claim reserves, payments and collections through the complete claim life cycle. Collections are subrogation or recovery payments associated with a claim after offsetting checks or payments. You can enter a collection without setting up reserves for claims.

To process a payment you have to set up the payment and then issue a check. You can void a payment at any time after you create it. If the voided check was written against the reserves for a claim, RISKMASTER increases the reserves by the amount of the void check.

Reserves are the funds sets aside by insurance companies to assure that they can cover future liability. Reserves are also the total unpaid amount of claims reported on a specific accounting date. When you make a payment, RISKMASTER subtracts the payment amount from the reserve balance.

Using the Funds Management module you can set up bank accounts and print and schedule checks. You can set up account records and check stocks for your checking as well as escrow bank accounts and set up multiple check stocks for each bank account. You can also use the bank account reconciliation option to process data from your bank's electronic statement to balance your bank accounts with data in the RISKMASTER database. Funds management enables you to set up and print checks for claim payments, and also schedule automatic checks for future payments.

The RISKMASTER Funds Management module lets you control invoicing and billing information related to a payment. You can approve transactions for your subordinates who do not have authority to issue checks beyond a certain incurred limit, and print reports of pending payments, issued checks or Explanation of Benefits (EOB).

Bill Review Fee

Set Up and Work with Bill Review Fee Payments

1. Open the Org Level Entity window for the entity you want to setup Bill Review Fee amount.
2. In the Hospital Bill Review Amount per line item, enter the amount for creating queued bill review fee payment with Type of Bill as 'Hospital'.

Note: This field displays on the window when on the General System Parameter Setup window: Funds Settings tab, the 'Enable Bill Review Fee:' check box is selected and from the Org. Level for Bill Review Fee field, the specified organization hierarchy level is selected.

3. In the Min # of lines, enter the minimum number of lines to be considered for creating a queued Bill Review fee Payment. The number of lines specified in this field is compared with the funds split in the BRS transaction. If the number of splits is lower than the minimum number of lines specified here, the total queued payment is calculated by multiplying the hospital bill review amount per line item and minimum number of lines, else payment is calculated by multiplying the number of splits and Hospital Bill Review Amount per line item.
4. In the Medical Bill Review Amount per line item, enter the amount for creating queued bill review fee payment with Type of Bill as Medical.

Note: This field displays on the window when on the General System Parameter Setup window: Funds Settings tab, the 'Enable Bill Review Fee:' check box is selected and from the Org. Level for Bill Review Fee field, the specified organization hierarchy level is selected.

5. In the Min # of lines field, enter the minimum number of lines to be considered for creating a queued Bill Review fee Payment. The number of lines specified in this field is compared with the funds split in the transaction. If the number of splits is lower than the minimum number of lines specified here, the total queued payment is calculated by multiplying the medical bill review amount per line item and minimum number of lines, else payment is calculated by multiplying the number of splits and Medical Bill Review Amount per line item.

   The amount in BRS queued payment is calculated based on the amount and number of lines specified here.

Select the Type of Bill for Bill Review Fee Queued Payment

Open the BRS transaction related to the org. hierarchy level which you want to create queued bill review payment for.

From the Funds window: Transaction tab, in the Type of Bill field select the required bill type.

Note: The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical/hospital payments generated for bill review fees will have check status as queued.

Note: The total number of funds split in the BRS Transaction is compared to the number of lines specified in the Min # of lines field on the Org Level Entity window for that particular type of bill selected on the Funds window: Transaction tab.

Activating Bill Review Fee Payments and Setting Up Org Hierarchy level

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, select System Parameters.
   The General System Parameters Setup window opens.

3. Select the Funds Settings tab.

4. Select the Enable Bill Review Fee check box to activate bill review fee feature and to create queued medical/hospital payments.

5. From the Org. Level for Bill Review Fee field, select the required level for which you want to use the bill review fee and the amount for creating payments.

6. In the Org. Entity Name field, select the Ellipses button to select the entity for which you want to use bill review fee feature.

To Bulk Release Checks

1. From the main menu, choose Funds.
   The Funds menu opens.

2. From the Funds menu, select Bulk Check release.
   The Bulk Check Release window opens.

3. In the Search Criteria section, enter the search parameters to filter transactions for bulk check release based on table below

Transaction From Date:	Enter the start date of the date range for which you want to search the transactions based on Transaction Date or select the ▦ button to select the date from a calendar.
Transaction To Date	Enter the end date of the date range for which you want to search the transactions based on Transaction Date or select the ▦ button to select the date from a calendar.
Reserve Type:	Enter reserve type for the reserve account based on which you want to search transactions or select the 🔍 button to select the reserve type from code selection window.
From Date (Start)	Enter the start date of the date range for the service period of transactions which you want to search based on From Date or select the ▦ button to select the date from a calendar.
From Date (End)	Enter the end date of the date range for the service period of transactions which you want to search based on From Date or select the ▦ button to select the date from a calendar.
To Date (Start)	Enter the start date of the date range for the service period of transactions which you want to search based on To Date or select the ▦ button to select the date from a calendar.
To Date (End	Enter the End date of the date range for the service period of transactions which you want to search based on To Date or select the ▦ button to select the date from a calendar.
Invoice From Date	Enter the start date of the date range for which you want to search the transactions based on Invoice date or select the ▦ button to select the date from a calendar
Invoice To Date	Enter the end date of the date range for which you want to search the transactions based on Invoice Date or select the ▦ button to select the date from a calendar
Invoice #:	Enter the invoice number for which you want to search the transactions
Provider	Enter the name of the person who facilitates the check or select the ⋯ button to open Standard Entity Search window and search the required record.
Claim Number	Enter the number of claim associated with transaction or select the ⋯ button to open Standard Entity Search window and search the required record.
Amount	Select the required operator from the drop down and then enter the amount based on which you want to search the transactions.
Account Name	Enter the name of the bank account based on which you want to search the transactions.
Transaction Type	Enter the reserve account based on which you want to search the transaction, or select the 🔍 button to select from the Code Selection window.
Client	Enter the name of the client based on which you want to search the transaction or select the 🔍 button to select the client from Org Hierarchy window.
All Clients	Select the check box if you want to include all clients in transaction search criteria.

4. Select the Search button to search for the transaction based on the search criteria.
5. Select the Clear button to clear data in search criteria fields.
   The Search Results (Queued Payments) displays the transactions.

6. Select the check box next to the transaction record for which you want to release checks.

7. Select the 'Select All' button to mark all transactions in the Search results.

8. Select the 'Deselect All ' button to un-mark all the transactions in the Search results.

    The Total Unselected field displays the total amount of all unselected payments and the Total Selected field displays the total amount of all selected payments.

9. From the Target Check Status field, select 'Printed' or 'Released ' as the status of check for processed payment.

10. Select the Process button.

    The Check Status of the selected queued payments will be updated to the selected Target Check Status. Reserves for the payments processed is also updated.

Payments processed successfully.

The following payments have been Released/Printed and the Reserves have been updated.

Client	Transaction Date	Payee Name	Claim Number	Amount	Trans. Type	Account Name	Reserve Type	Current Adjuster
Do Not Use	6/22/2012	sdvsdv,	AMD2000006883	213	HOSP/MED-Hospital/Medical	Set-Up Account	AUTOBI-Bodily Injury	saxasxsax
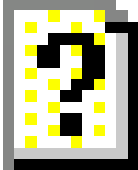
Unsuccessful processed payments.

The Reserves for the following payments are not sufficient, so these payments cannot be Released/Printed.

Client	Transaction Date	Payee Name	Claim Number	Amount	Trans. Type	Account Name	Reserve Type	Current Adjuster
Do Not Use	6/25/2012	XSNWS Director,	GLBI32650006888	51	-	Set-Up Account	E-Expense	

Close

Note: If Reserves are insufficient for the amount of the payment, the payment will remain in Queued status. A report will be generated showing the client, transaction date, payee name, claim number, amount, transaction type, bank account name and current adjuster on the claim.

11.

12.

Bulk Check Release Window

Menu
- From the main menu, select Funds. hdsf

- From the Funds menu, select the Bulk Check Release.

Field definitions

Transaction From Date: Enter the start date of the date range for which you want to search the transactions based on Transaction Date or select the [calendar icon] button to select the date from a calendar.

Transaction To Date	Enter the end date of the date range for which you want to search the transactions based on Transaction Date or select the [calendar] button to select the date from a calendar.
Reserve Type:	Enter reserve type for the reserve account based on which you want to search transactions or select the [search] button to select the reserve type from code selection window.
From Date (Start)	Enter the start date of the date range for the service period of transactions which you want to search based on From Date or select the [calendar] button to select the date from a calendar.
From Date (End)	Enter the end date of the date range for the service period of transactions which you want to search based on From Date or select the [calendar] button to select the date from a calendar.
To Date (Start)	Enter the start date of the date range for the service period of transactions which you want to search based on To Date or select the [calendar] button to select the date from a calendar.
To Date (End	Enter the End date of the date range for the service period of transactions which you want to search based on To Date or select the [calendar] button to select the date from a calendar.
Invoice From Date	Enter the start date of the date range for which you want to search the transactions based on Invoice date or select the [calendar] button to select the date from a calendar
Invoice To Date	Enter the end date of the date range for which you want to search the transactions based on Invoice Date or select the [calendar] button to select the date from a calendar
Invoice #:	Enter the invoice number for which you want to search the transactions
Provider	Enter the name of the person who facilitates the check or select the [...] button to open Standard Entity Search window and search the required record.
Claim Number	Enter the number of claim associated with transaction or select the [...] button to open Standard Entity Search window and search the required record.
Amount	Select the required operator from the drop down and then enter the amount based on which you want to search the transactions.
Account Name	Enter the name of the bank account based on which you want to search the transactions.
Transaction Type	Enter the reserve account based on which you want to search the transaction, or select the [search] button to select from the Code Selection window.
Client	Enter the name of the client based on which you want to search the transaction or select the [search] button to select the client from Org Hierarchy window.

All Clients	Select the check box if you want to include all clients in transaction search criteria.
Search	Select the Search button to search for the transaction based on the search criteria.
Clear	Select the Clear button to clear data in search criteria fields.
Select All	Select the Select All button to mark all transactions in the Search results.
Deselect All	Select the Deselect All button to unmark all the transactions in the Search results.
Target Check Status	From the drop down list, select 'Printed' or 'Released ' as the status of check for processed payment.
Total Unselected	The field displays the total amount of all un-selected payments.
Total Selected	The field displays the total amount of all selected payments.
Process	Select the Process button to update the Check Status of the selected queued payments to the selected Target Check Status. Reserves for the payments processed is also updated.

Reserves

To Create a Reserve

1. Search for the claim you want to create a reserve for.
2. From the left navigation tree, under the required claim node select the Financials link.

3. The Reserves window opens.

4. From the list of reserves, select a reserve.
   The Reserve for claim window opens.

5. Complete the fields in the Reserve for claim window , as shown below .

Date	Enter the date on which the new reserve takes effect or select the ▦ button to select from a calendar. Usually this is the current date.
Reserve Amount	Enter the new reserve amount.
Status	From the drop down list, select the status of the claim.
User ID	Displays your RISKMASTER User ID. You can enter a different user ID if you want.
Reason	From the drop down list, select the reason why you are changing the reserve amount.

Currency Type	Select the lookup button to select a different currency for the reserves. The system converts the entered currency to claim currency.
	If the payment is not associated with a claim the currency type will default to Base Currency.

6. In the Date field, enter the date on which the new reserve takes effect or select the ▦ button to select from a calendar. Usually this is the current date.
7. n the Reserve Amount field, enter the new reserve amount.
8. In the Status field, from the drop down list select O for open.
9. In the User ID field, enter your RISKMASTER user ID. You can enter a different user ID if you want.
10. From the Reason drop down list, select the reason for creating the reserve.
11. In the Assigned Adjuster field, select the adjuster associated with the reserve.
12. From the Currency Type field, select the lookup button to select a different currency for the reserves. The system would convert the entered currency to claim currency.
13. Select Modify.

To Edit a Reserve

1. Search for the claim for which you want to edit the reserve .
2. From the left navigation tree, under the required claim node, select the Financials link..
    The Reserves window opens.

3. From the list of current reserves, double click the reserve you want to edit.
    The Compensation Reserve for claim window opens.

4. Enter the date on which the new reserve takes effect. Usually this is the current system date.

5. Edit the information in the fields.

6. Select Modify.
    The Reserves window displays the changed reserve amount.

To Edit Existing Reserve- Carrier Claim

> Note: The Edit Existing Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

1. Search for the claim you want to edit a reserve for.
2. From the left navigation tree, under the required claim node select the Financials link.
    The Reserves window opens.

3. From the toolbar, select the Edit Reserve 🖊 button.
    The Edit Existing Reserve window opens.

4. Complete the fields on the Edit Existing Reserve window, as shown below.

Policy Name	Displays the Policy Name attached to the claim.
Unit	Displays the code that best describes the vehicle type.
Coverage Type	Displays the coverage type for the reserve.
Reserve Type	Displays the reserve type.
Reserve Sub-Type	From the dropdown select the code that best describes the type reserve sub category.
	Note: The options displayed in this field are based on the type selected in Reserve Type field.
Loss Type	From the drop down list, select the code that best describes the loss.
	Note: This field will be part of the financial key.
Amount	Enter the reserve amount.
	Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.
Reserve Balance	Displays the balance amount remaining in the reserve after the payments made.

Currency Type	From the Currency Type field, select the lookup button to select a different currency for the reserves. The system converts the entered currency to claim currency

> Note: By default, claim currency will display in the Currency Type field. If the payment is not associated with a claim, the currency type will default to Base Currency.

Status	From the drop down list, select the status of the reserve.

If you select Close, the claim will not be closed automatically.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.

Reason	From the drop down list, select the reason why you are changing the reserve amount.
OK	Select to save your changes and close the window.
Cancel	Select to close the window without saving your changes.

To View Reserve History

1. Search for the claim with the reserve for which you want to view a history.
2. From the left navigation tree, under the required claim node, select the Financials link.
   The Reserves window opens.

3. From the list of current reserves, select the reserve for which you want to view a history.
   The Compensation Reserve for claim window opens and displays the history of the reserve you selected.

4. To return to the Reserves window, select Cancel.

Insufficient Reserve Window

Use the Insufficient Reserve Funds window to adjust reserves for a claim when you try to make a payment that exceeds the existing reserves. This window automatically opens when you try to save a transaction on the Funds Management window, and the payment amount is more than the current reserves.

You can use this window if your system is set up to check for insufficient reserve funds in RISKMASTER Utilities .

Field definitions

Current Balance	Displays the current reserve balance amount.
Current Reserve	Displays the current reserve amount.

Payment Amount	Displays the payment amount you are trying to save on the Funds Management window.
Set Reserve	In the field, enter a new total reserve amount and then select the Set Reserve button to change the total reserve amount. By default, RISKMASTER enters a new reserve amount that is just enough to cover the excess payment.
Add to Reserve	In the field, enter the dollar amount to add to the current reserve amount and then select the Add to Reserve button to add to the current reserve amount. By default RISKMASTER enters a dollar amount that is just enough to cover the payment you are trying to make.
Continue	Select to save your changes and close the window.
Cancel Save	Select to close the window without saving your changes.
	If you select this button the payment you are trying to make is not saved.

Reserve for Claim Window

Use the Reserve for Claim window to assign reserves to a claim, after you enter a claim.

To open	From the Reserves window, select a reserve link.

Field definitions

Date	Enter the date on which the new reserve takes effect. Usually this is the current system date.
Reserve Amount	Enter the new reserve amount.
Status	From the drop down list, select the status of the claim.
	Note: **If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.**
	When the amount set exceeds the reserve limits, the reserve status is set to Hold. No payment /collection is allowed when the reserve status is set to Hold.
User ID	Displays your RISKMASTER User ID. You can enter a different user ID if you want.
Reason	From the drop down list, select the reason why you are changing the reserve amount.
Currency Type	Displays the Currency Type to show which currency type is being used.
	Note: By default, claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.
Table	Displays the previous reserve amounts that you entered.
Modify	Select to save your changes and close the window.

Note: The Modify button gets disabled, when the reserve status is set to Hold.

Cancel   Select to close the window without saving your changes.

Print   Select to print the details on the Reserve for claim window.

Approve   Select the button to approve the changes.

> Note: The Approve and Reject buttons are visible only when the reserve status is set to Hold.

Reject   Select the button to reject the changes.

> Note: The Approve and Reject buttons are visible only when the reserve status is set to Hold.

Add New Reserve Window- Carrier Claim

> Note: The Add New Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

To open

From the Reserves window, select the Add New Reserve [icon] button.

Field definitions

Policy Name   From the drop down list, select the Policy Name.

Unit   From the drop down list, select the vehicle type for the reserve.

Coverage Type   From the drop down list, select the coverage type for the reserve.

Reserve Type   From the drop down list, select the reserve type.

Amount   Enter the reserve amount.

> Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.
>
> Currency Calculator : Converts user entered currency into claim currency for Reserve.

Currency Type   From the drop down list, select the status of the claim.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.
>
> **When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.**

Reserve Sub Type	From the dropdown, select the code that best describes the type reserve sub category.
	Note: The option displayed in this field are based on the type selected in Reserve Type filed..
Loss Type	From the drop down list, select the code that best describes the loss.
	Note: This field will be part of the financial key.
Status	From the drop down list, select the reason why you are changing the reserve amount.
Reason	Select to save your changes and close the window.
OK	Select to close the window without saving your changes.
Add More	Select the button to create more reserves from the Add New Reserve Window without the need to navigate back to reserve window. When you select this button, the current reserve will be saved and the new reserve window will be reset to allow you add data for another reserve. If the reserve key for the reserve is duplicate, a warning message is displayed.
Cancel	**Select to close the window without saving your changes.Options on Add New Reserve window**
Collapse	Select to collapse the window.
Maximize	Select to maximize the window.
Close	Select to close the window.

Edit Existing Reserve Window - Carrier Claim

Note: The Edit Existing Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

To open

From the Reserves window, select the Edit Reserve button.

Field definitions

Policy Name	Displays the Policy Name attached to the claim..
Unit	Displays the code that best describes the vehicle type.
Coverage Type	Displays the coverage type for the reserve.

Reserve Type   Displays the reserve type.

Amount   Enter the reserve amount.

> Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.
>
> Currency Calculator : Converts user entered currency into Claim Currency.

Currency Type   Displays the Currency Type to show which currency type is being used.

> Note: By default, claim currency will display in the Currency Type field. If the payment is not associated with a claim, the currency type will default to Base Currency.

Reserve Sub-Type   From the dropdown select the code that best describes the type reserve sub category. Note: The options displayed in this field are based on the type selected in Reserve Type field.

Loss Type   From the drop down list, select the code that best describes the loss.

Note: This field will be part of the financial key.

Status   From the drop down list, select the status of the claim.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.

Reason   From the drop down list, select the reason why you are changing the reserve amount.

Add More   Select the button to create more reserves from the Add Reserve window without the need to navigate back to the Reserves window. When you select the button the current reserve will be saved and the Add New Reserve window will be reset to allow you to add data for another reserve. If the reserve key for the reserve is a duplicate,a warning message is displayed.

OK   Select to save your changes and close the window.

Cancel   **Select to close the window without saving your changes.Options on Edit New Reserve window**

Collapse   Select to collapse the window.

Maximize   Select to maximize the window.

Close   Select to close the window.

Reserve window- Carrier Claims

Policy Name   Displays Policy Name.

Unit   Displays the vehicle type for the reserve.

Coverage Type   Displays the coverage type for the reserve.

Reserve Type   Displays the reserve type.

Loss Type   From the drop down list, select the code that best describes the loss.

                    Note: This field will be part of the financial key.

Balance   Displays the reserve balance for each reserve category.

Reserve Type   Displays the type of the reserve.

Paid   Displays the payments that you have entered for claim or claimant.

                    Note: When you enter a payment, you have to select a Transaction Type code to determine the reserve category

Collections   Displays any income related to the claim for each reserve category.

                    Note: Recoveries or subrogation are also Collections.

Incurred   Displays the balance (plus payments less collections) for each reserve category.

Status   Displays the status of the claim.

                    Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

                    When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to only. No payment /collection is allowed when the reserve status is set to Hold.

Change Amount   Displays the amount based on the Reserve History.

Amount   Enter the reserve amount.

                    Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.

Reason   Displays the reason why you are changing the reserve amount.

OK   Select to save your changes and close the window.

Cancel	Select to close the window without saving your changes.

Transaction Details for Selected Reserve

Payee Name	Displays the name of the payee for the selected reserve.
Check Number	Displays the check number for the selected reserve
Date of Check	Displays the date of the check issue
Type	Displays whether a transaction is a Payment or a Collection
Transaction Type	Displays the transaction type of the transaction associated with reserve
Amount	Displays the amount of the transaction
Status	Displays the status of the transaction
Void	Displays whether the transaction was voided or not.
Stop Pay	Displays whether the payment for the transaction was stopped or not.
Control Number	Displays the Control number of the transaction associated with the selected Reserve.
Cleared	Displays whether the payment for the transaction was cleared or not.

	Select the button to add new reserve.
	Select the button to modify an existing reserve.
	Select the button to add payment.

> Note: When on the Security Management System window, the First and Final Payment checkbox is selected, you
> be able to make a payment without selecting a reserve. If the checkbox is not selected, you need to selec
> reserve from the reserve listing to make a payment.

	Select the button to add a collection.

	Select the button to view payment history.
	Select the button to view reserve history.
	Select the button to view the financial summary of the reserve.
	Select the button to view OFAC summary of the record.
	Select the button to view the reserve summary of the claim.
	Select the button to view the unit or coverage level financial summary. When you select this button, the Financial summary displays. From the Level dropdown list, select the Policy, Unit, or Coverage option to view financial summary for the claim for that le
	Select the button to open the Financial Detail History window to view financial history of the reserve.

Reserves Overview

Use RISKMASTER to work with reserves, payments, and collections in a logical sequence that follows the life cycle of a claim . When you first record a claim, you create the opening reserve . You can subdivide the reserve into multiple categories, including expense and indemnity .

You can increase or decrease reserves whenever necessary. When you make a payment , the payment amount is subtracted from the reserve balance. When you close a claim, you can set RISKMASTER up to either reset the reserve balance to zero, the reserve amount to zero, or to leave it unchanged.

> Note: CSC recommends that you set up reserves for a claim before processing payments. RISKMASTER does not include claims without reserves in financial reports.

Reserve Categories

RISKMASTER uses different reserve categories for each line of business and for claimants. Your system administrator creates the categories when RISKMASTER is installed. In general, all user reserves are linked to two reserve categories:

- **Expense:** The reserves for expenses defined by your organization. This includes all reserves that are not considered indemnity reserves.

- **Indemnity:** The amount needed to indemnify your organization against the claim. The indemnity reserve can change over time for many reasons specified by your legal counsel and actuary.

Reserve Calculations

RISKMASTER calculates reserve balance and related data as shown next:

	For open claims	**For closed claims**
Reserve Balance=	When Collections are not taken into account: ▪ Reserve Amount - Paid When Collections are taken into account: ▪ Reserve Amount - Paid + Collections (if Collections are less than or equal to Paid) ▪ Reserve Amount (if Collections are more than paid)	May be 0, or left unchanged based on the settings in Utilities
Total Incurred =	When Collections are not taken into account: ▪ Greater of the Reserve Amount or Paid Balance When Collections are taken into account: ▪ Greater of the (Reserve Amount - Collections) or Paid Balance	When Collections are not taken into account: ▪ Greater of the Reserve Amount or Paid Balance When Collections are taken into account: ▪ Greater of the (Reserve Amount - Collections) or Paid Balance
Paid Balance=	Payments - Collections (if the difference is less than 0, then the Paid Balance will be 0	Payments - Collections (if the difference is less than 0, then the Paid Balance will be 0

Reserve Tracking Methods

Your system administrator can configure RISKMASTER to track reserves in either one of two ways:

- **Claim-level tracking:** Also called "gross-level" tracking. You can enter reserves and payments when entering or working with claims. Select this option to track reserves by claim only. This option is available for all four lines of business. You cannot track individual reserves for each claimant if you select this option.

- **Detail-level tracking:** Also called "claimant-level" or "unit-level" tracking. You can only record reserves and payments at the claimant or unit level. Detail-level tracking is designed for organizations that allocate costs at the most detailed level. This option is only available for General and Vehicle Accident claims.

- When using detail-level tracking for General claims, the Financials tab in the Claim window displays an aggregate of the claimant financials and is read-only.

- When using detail-level tracking for Vehicle Accident Claims, the Financials tab in the Claim window displays an aggregate of the claimant and the unit financials and is read-only.

> Note: CSC strongly recommends that you do not change your reserve tracking method once you start recording claims. If you have to change your reserve tracking method, do it at the start of your organizations fiscal year .

Auto Adjusting Reserves

Your system administrator specifies how reserves are maintained for open and closed claims. This influences the reserve reports you generate. Your system administrator can set your system to Auto Adjust Negative Reserves to Zero so that when you enter a payment that is greater than the Reserve Balance, RISKMASTER automatically raises the Reserve amount and maintains a zero balance and processes the payment. If your reserve history reports show many automatic adjustments to Reserves, consider raising your opening Reserve levels. You should also review your claims more frequently to manually raise the Reserve levels before an automatic adjustment is necessary.

Closed Claim Reserves

When setting up RISKMASTER, your organization can define the following settings for claim reserves when a claim's status is set to "Closed".

- **Set Reserve Balance to Zero:** Automatically adjusts the reserve balance to zero for any reserve amount

- **Set Reserve Amount to Zero:** Automatically adjusts the reserve amount to zero.

- **Set Negative Reserve Balance to Zero:** Automatically adjusts any negative reserve balance to zero.

- **Do Nothing:** Makes no change to the reserve amount or the reserve balance

The method your organization selects will have a significant effect on your reserve reports.

Checks

Schedule Automatic Check Processing Window

Use the Schedule Automatic Check Processing window to set up your system to automatically generate payments to a payee .

To open	▪ From the main menu, select Funds.
	▪ From the Funds menu, select the Automatic Checks link.

Field definitions

Scheduled Checks tab

Detailed Information tab

Third Party Payees tab

Select Batch	Select to open the Results for Automatic Check Batches window and from the list of all existing scheduled automatic check batches, select a batch.
	The selected batch opens in the Schedule Automatic Check Processing window.
	Note: When a batch of checks is printed it does not display in the list.
Back to Financials	Select to open the Reserves window for the claim for which you are scheduling automatic checks.
	Select the button to open the Enhanced Notes for the associated parent claim record.
	Note: The Enhanced Notes button is only visible when a claim number is entered.

Void Checks Window

Use the Void Checks window to void printed checks. Void transactions remain in the database for auditing purposes.

Note: After you void a transaction, you cannot undo the Void status. If you think that you voided a transaction in error, you must create a new transaction. Also, you cannot reuse the check number of a printed check that you have voided.

Menu	▪ From the main menu, select Funds.
	▪ From the Funds menu, select the Void Checks.

Field definitions

Check Searching Criteria	Enter the search criteria to display the checks that you want to void.

Check Date From To	Enter the date range for the period during which the checks were issued or select the ![calendar] button to select from a calendar.
Include Collection	Select the check box if you want RISKMASTER to display collection checks in the search results.
Checks Not Attached to Claims	Select the check box if you want RISKMASTER to display in the search results, checks not attached to claims.
Filter by Company	From the drop down list, select an organization to view checks only associated with the organization.
Select Checks to Void	Displays all the checks that meet your search criteria.
Transaction #	Displays the serial number for the transaction. Select the check box to select the check box for all the transactions that display.
	Note: To select individual checks, select the check box for each transaction number.
Check Date	Displays the date printed on the check.
Control #	Displays the check number that will print on the check.
Payee Name	Displays the payee name.
Claim Number	Displays the claim number for the claim associated with this payment .
Amount	Displays the dollar amount of the check.
Account Name	Displays the bank account name.
Select All	Select the button to select to void all the checks that display.
Deselect All	Select the button if you want to remove the selection that you made and select new checks.
Refresh	Select to refresh the checks that display, based on changes you made to the Include Collections check box, the From and To fields and the Filter by Company field.
Void Checks	Select to void the selected checks.
Void Check Reason	Enter a valid reason for marking the check as void or select the ![editor] button to open the RISKMASTER Editor and enter the reason for marking the check as void.
	Note: The field will be visible only if Check Void Reason check box is selected in Utilities.

Mark Checks Cleared Window

Use the Select Checks to Mark as Cleared window to clear printed checks. Using this window you can clear multiple payments together.

Menu
- From the main menu, select Funds.
- From the Funds menu, select the Mark Checks Cleared.

Field definitions

Check Searching Criteria	Enter the search criteria to display the checks that you want to clear.
Check Date From To	Enter the date range for the period during which the checks were issued or select the ⬛ button to select from a calendar.
Checks Not Attached to Claims	Select the check box if you want RISKMASTER to display in the search results, checks not attached to claims.
Filter by Company	From the drop down list, select an organization to view checks only associated with the organization.
Select Checks to Mark as Cleared	Displays all the checks that meet your search criteria.
Transaction #	Displays the serial number for the transaction. Select the check box to select the check box for all the transactions that display.
	Note: To select individual checks, select the check box for each transaction number.
Check Date	Displays the date printed on the check.
Control #	Displays the check number that will print on the check.
Payee Name	Displays the payee name.
Claim Number	Displays the claim number for the claim associated with this payment .
Amount	Displays the dollar amount of the check.
Account Name	Displays the bank account name.
Select All	Select the button to select for clearing all the checks that display.
Deselect All	Select the button if you want to remove the selection that you made and select new checks.
Refresh	Select to refresh the checks that display, based on changes you made to the Include Collections check box, the From and To fields and the Filter by Company field.
Mark Cleared	Select to mark the selected checks as cleared.

Print Check Window

Use the Print Check window to enter details about checks before printing checks.

To open	▪ From the main menu, select Funds.
	▪ From the Funds menu, choose Print Checks.

Field definitions

[Precheck Register tab](#)

[Print Check Batch tab](#)

[Postcheck Register tab](#)

Print	Select to print checks.
Preview	Select to open the Print Preview window and preview details about the selected checks.
Print Setup	Select to open the Print Setup window and enter the printing options.
Close	Select to close the window without printing the check.

Check Stocks Window

Use to configure the way your checks look and the information on them. You must set up **check stock** for each bank account against which you will enter checks.

To open	▪ On the Bank Accounts window, select the Check Stocks button.
	▪ From the toolbar, select the Lookup button ![lookup icon].
	▪ Select the bank account for which you want to create a check stock.
	▪ From the Bank Accounts window, select the ![icon] button.

Field definitions

[Basic Options tab](#)

[Check Image tab](#)

[Alignment Options tab](#)

[Advanced Options tab](#)

Print Sample	Select the button to print a sample check to your default printer.
Clone	Select to open the Clone Check Stock window.
	To create a copy of the current check stock to use for any existing bank account,

- Select the **Use Current Bank Account** option to use the check stock for the current bank account.

- Select the **Select Bank Account From List** option to select another existing bank account from the drop down list.

- Select **Create** to create a copy of the check stock and assign it to the selected bank account.

- Select **Cancel** to close the window without creating a copy of the check stock.

Back to Bank Accounts   Select the button to open the Bank Accounts window.

Schedule Automatic Check Processing: Detailed Information Tab

Use the Detailed Information tab to enter details about the payment, the **reserve** accounts debited, and other transaction details.

To open   From the Schedule Automatic Check Processing window, select the Detailed Information tab.

Field definitions

Payment Information

Currency Type   Displays the type of currency.

> Note: If the payment is not associated with a claim the Currency Type will default to Base Currency.

Payment Number   Displays the payment number.

Print Date   Displays the date on which the check will be issued. RISKMASTER automatically enters these dates based on the First and Last Payment dates and the # of Payments that you entered on the Scheduled Checks tab.

Payment Total   Displays the total check amount for all checks. This includes payee checks and third party payee checks.

Third Party Total   Displays the check amount for each third party check. You enter this amount on the Third Party Payees tab.

Net Payment   Displays the total check amount for each check issued to the payee entered on the Schedule Checks tab.

Add   Select to add a payment to the table based on the pay interval and payment amount on the Schedule Automatic Check Processing: Scheduled Checks tab.

Delete   Select to delete the last entered payment.

Distribution Type	Select the lookup button to select the disbursement method for the check while adding a manual payment or an automatic transaction.
Transaction Type	Displays the reserve account to which RISKMASTER will apply this payment.
Reserve Type	Displays the reserve type based on the Transaction Type you selected.
Amount	Displays the payment amount.
From/To Date	Displays the date range for the period of service.
	Select to open the Payment Detail Entry: Add Transaction window and enter payment details.
	Select a payment and then select this button to open the Payment Detail Entry:Update Transaction window and edit the payment.
	Select a payment and then select this button to delete the payment.

Print Checks Window: Precheck Register Tab

Use the Precheck Register tab to preview checks before printing.

To open	From the Print Checks window, select the Precheck Register tab.

Field definitions

Bank Account	From the drop down list, select the account from which you want to issue the checks.
Order Field	From the drop down list select the criteria to sort the preview list of checks.
From Date	Select the check box and then select the date after which the checks you want to print were issued.
To Date	Select the check box and then select the last date on which the checks you want to print were issued.
Org. Hierarchy	Select the ••• button to open the Organization Hierarchy window and select an organizational hierarchy level based on which checks will be filtered.
Org. Hierarchy Level (For Display Only)	From the drop down list, select the organizational hierarchy level you want to display on the precheck register. Note: By default, the organizational hierarchy level you selected in 'Default Level to display on Precheck Register' field on the Payment Parameter Setup window:Check Options tab displays in this field.
All Checks	Select the option to print all the checks within the date range you entered.

Select Checks	Select the option to select the checks you want to print.
Choose	Select the button to open the Select Checks to Print window and select the checks you want to print.
	On the Select Checks to Print window, you can filter checks by control numbers starting with characters you enter.
	Note: The button gets enabled only when you select the Select Checks option.
# of Prechecks	Displays the number of checks RISKMASTER will display in the Print Preview window when you select the Preview button.
	Once you mark all the checks in the batch eligible to print, this field displays (None).
Total Amounts	Displays the total dollar amount of all the checks in the Preview list.
Print	Select to print the check.

Print Checks Window: Postcheck Register Tab

Use the Postcheck Register tab to review details about check you printed.

To open	From the Print Checks window, select the Postcheck Register tab.

Field definitions

Bank Account	From the drop down list, select the account from which you want to issue the checks.
Check Batch	Enter the check batch number for the check batch you want to print a summary for. The first batch of checks you mark as eligible to print is numbered 1, as you mark more check batches eligible to print they are incrementally numbered.
# of Payments	Displays the number of payments included in the checks you printed.
Postcheck Date	Displays the date on which you printed the batch of checks.
# of Checks	Displays the number of checks you printed.
Distribution Type	Select the lookup button to select the disbursement method for the check while adding a manual payment or an automatic transaction.

7. Regular Mail

8. Express Mail

9. Wire Transfer

10. FX Wires

11. EFT

12. Manual

From the drop down list select the criteria to sort the preview list of checks by.

Postcheck Register Type	▪ Select the **Detail** option to include details about the checks you printed. ▪ Select the **Summary** option to display a summary of the details about the checks you printed. ▪ Select **Sub Account** option to display sub account information for the checks you printed.
Print	Select to print details about the checks you printed.
Print EOB	Select to open and print the Explanation of Benefits.

Tips

Schedule Automatic Check Processing: Scheduled Checks Tab

Use the Scheduled Checks tab to enter details about the claim, the bank account and the **payee** for the automatic checks.

To open From the Schedule Automatic Check Processing window, select the Scheduled Checks tab.

Field definitions

Claim Number	Enter the claim number you want to associate with the payment or select the ••• button to search for a claim.
Claimant	Displays the claimant associated with the selected claim. If there are multiple claimants, select the ••• button and select a claimant from the list of claimants.
Unit	Displays the vehicle unit associated with the selected vehicle accident claim. If there are multiple units, select the ••• button and select a unit from the list of units for a Vehicle Accident claim.
Control Number	Enter the number your organization uses to track this data.
Bank Account	From the drop down list, select a bank account owned by the department responsible for this claim. RISKMASTER uses this bank account to pay the checks you are setting up. If no bank accounts are available, set up the bank account for the department before scheduling automatic checks.
Payee Type	From the drop down list, select the code that best describes the person receiving the check. If you select C-Claimant as the Payee Type, RISKMASTER automatically enters the payee information on this tab.

Last Name	If you did not select C- Claimant in the Payee Type field, select the ⋯ button to search for a payee.
First Name	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's first name.
Middle Name	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's middle name.
Tax ID	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's tax identification number.
Address	When you select a payee in the Last Name field, RISKMASTER automatically enters the address, city, state and zip details.
	You can enter a different Address also, as changes you make to the address here, do not affect the address record in the database.
Check Memo	Enter the text that you want print on the check.
Enclosure?	Select the check box if you will include other documents with the check.
	When you select the check box, "Enc" prints on the check.
Pay Interval	Enter the pay interval period or select the ⋯ button to select from the Code Selection window.
# of Payments	Enter the number of automatic checks you want to issue for this payment.
First Payment	Enter the date on which you want the first check to be issued or select the 📅 button to select from the calendar.
Final Payment	Displays the last check date based on the # of Payments and the First Payment date you entered.
Freeze Payment Batch	Select the check box if you want to freeze payments for the check batch.
Payees	Select the button open the code selection window and select payees for the selected payment
	Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction.
	The available options in the field are, 'attorney for' and 'as guardian of'.
	The first payee will not have a Payee List Phrase.
	Note: This field is enabled only when there are multiple payees for the transaction.
Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check

··· ('Generate Pay TO The Order Of')	Select the button to open the 'Generate Pay TO The Order Of' window and create the text for the Pay to the Order Of' field. Select the payee phrase needs to be associated with the payee and whether it comes before or after the payee name. You can then edit the pay to the order field. Any alteration to payees (order / addition / deletion) would reset the "Pay to the Order Of" to include all the payees in the payee list, and include the word "And" between each payee name. You can regenerate the payee phrases if needed. The payee and the associated payee phrases are saved to the database.
Combined Payment	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
EFT Payment	The check box is selected if the payment is to be made through electronic funds transfer. This check box will be automatically enabled and selected when you choose an EFT bank from the Bank Account drop down. You need to manually uncheck the check box if you to create a non EFT payment using an EFT bank account.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected. Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
Gross Amount	Displays the total dollar amount the payee you entered on this tab will receive. If you entered third party payees, the gross amount is the total of all checks less the total amount that third party payees will receive.
Net Amount	Displays the total dollar amount of the entire payment including a total of all checks for all payees.
# of Third Parties	Displays the number of third parties you added to the payment on the <u>Third Party Payees tab</u>.
Third Party Total	Displays the total dollar amount you will pay to third parties.
# of Checks Printed	Displays the total number of checks that will be printed as part of this payment. This includes all scheduled checks for the payee and for all third party payees.
Printed Amount	Displays the amount that will print on the check.
Total # of Checks	Displays the total number of scheduled checks that will be printed as part of this payment. This includes checks for the payee and for third party payees.
Payment Grand Total	Displays the total dollar amount the payee will receive.
Adjust Print Date Using Schedule Dates	**The check box selected by default** adjusts the Print Date using the Scheduled Dates. Note: The Adjust Print Date Using Schedule Dates check box is visible, when the Use For Automatic Checks check box on the Payment Parameters Setup window: Schedule Date tab is selected. By selecting the check box user have the option to omit the current batch from having the print date adjusted using Schedule Dates.
Currency Type	Enter the currency type or select the search button 🔍 to select from the Code Selection window.

Note: By default the Claim Currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Schedule Automatic Check Processing: Third Party Payees Tab

Use the Third Party Payee tab if you want to pay part of an automatic payment to someone other than the payee you specified in the Scheduled Checks tab. RISKMASTER deducts the amount you specify for the third party payment when you select the Deduct Against Payee check box and creates separate checks for the persons you add on the Third Party Payees tab.

To open   From the Schedule Automatic Check Processing window, select the Third Party Payees tab.

Field definitions

Third Party Payments

Last Name   Displays the third party payee's last name

First Name   Displays the third party payee's first name.

Percent   Displays the percent of the reserve balance that you want to pay to the third party payee.

Amount   Displays the payment amount.

Transaction Type   Displays the reserve account to which RISKMASTER will apply this payment.

Reserve Type   Displays the reserve type based on the Transaction Type you selected.

          Select to open the Third Party Payment Detail Entry window and enter payment details for the third party payee.

          Select a payee from the third party payments list and then select this button to open the Third Party Payment Detail Entry window and edit payment details for the third party payee.

          Select a payee from the third party payees list and then select this button to delete the third party payee.

Payment Detail Entry Window

Use to add additional payments on the Schedule Automatic Check Processing window.

To open   From the Schedule Automatic Check Processing window: Detailed Information tab, select the button.

Field definitions

Currency Type   Displays the type of currency.

Note: If the payment is not associated with a claim the Currency Type will default to Base Currency.

Transaction Type

Enter the reserve account to which you want to apply the payment, or select the [button] button to select from the Code Selection window.

Amount

Enter the payment amount. If you want to calculate the payment amount select the calculator button to open the calculator. To enter the amount from the calculator select the = button on the calculator.

Reserve Type

Based on the transaction type you selected, RISKMASTER displays the reserve type.

Reserve Balance

Displays the balance remaining in the reserve account you selected in the Transaction Type field.

GL Account

Enter the general ledger fund from which you want to make this payment, or select the [button] button to select from the Code Selection window.

Reserve Balance(Claim Currency)

Displays the balance remaining in the reserve account you selected in the transaction type field.

Note: The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

From and To

Enter the date range for the period of service or select the [button] button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.

Invoiced By

Enter the name of the payee who sent you the bill.

Invoice Number

Enter the invoice number or any other identifying number that displays on the bill.

Invoice Amount

Enter the billing amount that displays on the bill.

Invoice Date

Enter the bill date that displays on the bill.

P.O. Number

Enter your organization's internal purchase order number.

OK

Select to save the payment and close this window.

Cancel

Select to close the window without saving the information you entered.

Check Stocks Window: Check Image Tab

Use the Check Image tab to define the background of the check and other graphic information that will print on the check.

To open

On the Check Stocks window, select the Check Image tab.

Field definitions

None or Pre-Printed Check Stock	Select the option if you do not want background images or graphics to print on the check.
RxLaser (hardware cartridge or DIMM)	Select the option if you want background images or graphics to print on checks from a hardware cartridge or a DIMM chip. The DIMM chip or the cartridge must be installed on each printer that you will use to print the checks.
Regular Check	If you select the RxLaser option, enter the image number for the image you want to use for regular checks. Each image contained in the hardware cartridge or the DIMM chip has a number assigned to it. Contact your chip or cartridge supplier for a list of images and their respective image numbers.
Non-Negotable or Void	If you selected the RxLaser option, enter the image number for the image you want to use for non-negotiable or void checks. Each image contained in the hardware cartridge or the DIMM chip has a number assigned to it. Contact your chip or cartridge supplier for a list of images and their respective image numbers.
Use Special Check?	Select the check box if you want to issue special checks (different from regular checks or non-negotiable or void checks). If you select this option, these special checks will automatically be used when the check amount exceeds the amount you specify in the Activate When Amount >= field.
Special Check	If you selected the Use Special Check option, enter the image number for the image you want to use for special checks. Each image contained in the hardware cartridge or the DIMM chip has a number assigned to it. Contact your chip or cartridge supplier for a list of images and their respective image numbers.
Activate When Amount >=	If You want to print special checks when the check amount is greater than or equal to a certain dollar amount, enter that dollar amount here.
Windows Metafile (software generated)	Select the option if you want background images or graphics to print on checks from a Windows Metafile (.emf file). Customized Windows Metafiles with images your organization uses are saved on your system. Contact your system administrator for the location of the Windows Metafiles.
Visio 2007 emf	Select this option if the emf image you are using was generated from Visio 2007.

Regular Check   If you selected the Windows Metafile option,

- Select the Set Image button to open the file browser and select a Windows Metafile image to use on regular checks.

- Select the View Image button to preview the check with the Metafile image in the View Check Image window.

Non-Negotiable or Void   If you selected the Windows Metafile option,

- Select the Set Image button to open the file browser and select a Windows Metafile image to use on non-negotiable or void checks.

- Select the View Image button to preview the check with the Metafile image in the View Check Image window.

Use Special check   Select the check box if you will issue special checks (different from regular checks or non-negotiable or void checks). If you select this option, these special checks will automatically be used when the check amount exceeds the amount you specify in the Activate When Amount >= field.

Special Check   If you selected the special checks option,

- Select the Set Image button to open the file browser and select a Windows Metafile image to use on special checks.

- Select the View Image button to preview the check in the View Check Image window.

Activate When Amount >=   If You want to print special checks when the check amount is greater than or equal to a certain dollar amount, enter that dollar amount here.

Check Stocks Window: Basic Options Tab

Use the Basic Options tab to define the basic design and appearance of the check stock .

To open   On the Check Stocks window, select the Basic Options tab.

Field definitions

Stock Name   Enter a unique name for the check stock.

Font Name   From the drop down list select the font you want to use on the check.

Font Size   From the drop down list select the font size you want to use on the check.

RISKMASTER displays a preview of how the fonts will look on your check.

MICR Enabled?   Select the check box to print the series of numbers that a bank uses to track checks.

Note: Magnetic Ink Character Recognition (MICR) is a font set used to print information on financial documents like checks.

Typed Character	Meaning	MICR Character
;	Transit Number	
>	Amount	
:	On Us	
=	Dash	

d   Check Number 0-9

MICR Settings

MICR Number	If you selected the MICR enabled check box, enter the MICR number.

> Note: Refer to your financial institution for the order of the transit numbers, routing numbers, or other information you enter in the MICR number field.

MICR Type	Select one of the following:

- Select the **RxLaser (hardware cartridge or DIMM)** option if you want to use a hardware cartridge or a DIMM chip to print the MICR numbers. You have to install the hardware cartridge or DIMM chip on each printer you will use to print checks.

- Select the **True Type Font (software generated)** option, if you want to use system fonts contained in your computer.

MICR Font Name	From the drop down list, select the MICR font you want to use.
MICR Font Size	From the drop down list, select the MICR font size you want to use.

Tips

Check Stocks Window: Alignment Options Tab
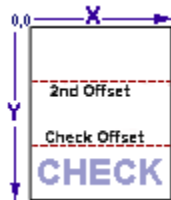
Use the Alignment Options tab to define data alignment on checks. Enter X and Y coordinates to specify exactly where you want an element to display on the check. As you increase an X coordinate, the element moves to the right. As you increase the Y coordinate the element moves down. Check with your check stock supplier to get exact measurements.

Note: If you do not want data listed on this tab to display on your checks, enter coordinates that fall outside the check perimeter.

To open   On the Check Stocks window, select the Alignment Options tab.

Field definitions

Date	Enter the X and Y coordinates for where you want the date to display on the check.
Check Number	Enter the X and Y coordinates for where you want the check number to display on the check.
Amount	Enter the X and Y coordinates for where you want the check amount to display on the check.
Amount Text	Enter the X and Y coordinates for where you want the check amount text to display on the check.
Claim Number	Enter the X and Y coordinates for where you want the claim number to display on the check.

Memo Text	Enter the X and Y coordinates for where you want the memo text to display on the check.
Trans. Detail	Enter the X and Y coordinates for where you want the transaction details to display on the check.
Payer	Enter the X and Y coordinates for where you want the payer name to display on the check.
Payee	Enter the X and Y coordinates for where you want the payee name to display on the check.
Check Offset	For 2-part checks, enter the X coordinate for where you want the address to display and Y coordinates for where you want the fold line to display
MICR Offset	Enter the X and Y coordinates for where you want the MICR number to display.
2nd Offset	For 3-part checks, enter the X coordinate for where you want the transaction details to display and a Y coordinates for where you want the second fold line to display. Note: For 2-part checks enter 0 in both X and Y fields.
Units	Displays the unit such as, Centimeters or Inches, for X and Y coordinates based on the configuration settings done by your System Administrator.
Restore Defaults	Select Restore Defaults > Restore Defaults to set all alignments to default values.
Check in Middle	Select Restore Defaults > 3 Part Checks > Check in Middle to place the check in the middle of a 3 part check and restore defaults.
Check at the Bottom	Select Restore Defaults > 3 Part Checks > Check at the Bottom to place the check at the bottom of a 3 part check and restore defaults.

Un-Clear Checks

Use the Un-Clear Checks tab to change the state of checks marked as cleared to printed state.

To open	▪ From the main menu, select Funds ▪ From the Funds menu, select the Un-Clear Checks.

Field definitions

Check Searching Criteria	Enter the search criteria to display the checks that you want to mark as printed/un-clear.
Check Date From To	Enter the date range for the period during which the checks were issued or select the ▦ button to select from a calendar.
Include Collections	Select the check box if you want RISKMASTER to display collection checks in the search results.

Checks Not Attached to Claims	Select the check box if you want RISKMASTER to display in the search results, checks not attached to claims.
Filter by Company	From the drop down list, select an organization to view checks only associated with the organization.
Filter By Bank Account	From the drop down list, select a bank account to view checks only associated with the bank account.
Select Checks to Mark as Un-cleared	Displays all the checks that meet your search criteria.
Transaction #	Displays the serial number for the transaction. Select the check box to select the check box for all the transactions that display.
	Note: To select individual checks, select the check box for each transaction number.
Check Date	Displays the date printed on the check.
Control #	Displays the check number that will print on the check.
Payee Name	Displays the payee name.
Claim Number	Displays the claim number for the claim associated with this payment .
Amount	Displays the dollar amount of the check.
Account Name	Displays the bank account name.
Select All	Select the button to select to reset the checks marked as cleared to printed state for all the checks that display.
Deselect All	Select the button if you want to remove the selection that you made and select new checks.
Refresh	Select to refresh the checks.
Mark Un-cleared	Select to mark as un-cleared the selected checks.

Third Party Payment Detail Entry Window

Use to enter third party payees and payment transaction details for the third party payees .

To open	From the Schedule Automatic Check Processing window: Third Party Payees tab, select the button.

Field definitions

Payee Details

Last Name	Enter the payee last name, or select the ··· button to open the Standard Entity Search window and select an entity.
First Name	Displays the payee entity's first name.
Middle Name	Displays the payee entity's middle name.
Tax ID	Displays the payee entity's Tax ID.
Address	Displays the payee entity's address.
City, State, Zip	Displays the payee entity's city, state and zip code.
Check Memo	Enter the text you want to display on the check.
Deduct Against Payee	Select the check box if you want to deduct the payment amount from the primary payee's payment and create a second check for the payment.
Third Party Payee Enclosure	Select the check box if you want to include other documents with the check. When you select the check box, "Enc" prints on the check.
Transaction	
Currency Type	Displays the type of currency. Note: If the payment is not associated with a claim the Currency Type will default to Base Currency.
Transaction Type	Enter the reserve account to which you want to apply the payment, or select the 🔍 button to select from the Code Selection window.
Amount	Enter the payment amount.
Percent	Enter the percent of the reserve balance that you want to pay to the third party payee.
Enable Amount/Payment	Select to enable the Amount or Percent field, to enter a value. The corresponding field automatically displays a calculated value. For example, select Enable Percent to enter a percent value. The Amount field displays the calculated payment amount.
Reserve Type	Based on the transaction type you selected, RISKMASTER displays the reserve type.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the transaction type field.
Reserve Balance(Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field. Note: The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

GL Account	Enter the general ledger fund from which you want to make this payment, or select the button to select from the Code Selection window.
From and To	Enter the date range for the period of service or select the button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and close this window.
Cancel	Select to close the window without saving the information you entered.

Reset Printed Check

Use the Reset Printed Check tab to reprint checks that are not legible or the payee name was spelled incorrectly on the check. Instead of offsetting and re-entering the payment, the Reset Printed Check window changes the print check status from printed to release state and then the payment is printed again in the another check batch.

Note: A Voided/Cleared Check, EFT Payments and Bank Accounts are not included in the list of checks that are to be reset from printed to release state. A set of rolled up checks will be marked as release.

To open	▪ From the main menu, select Funds ▪ From the Funds menu, select the Reset Printed Check.

Field definitions

Check Searching Criteria	Enter the search criteria to display the checks that you want to mark as release state.
Check Date From To	Enter the date range for the period during which the checks were issued or select the button to select from a calendar.
Filter By Bank Account	From the drop down list, select a bank account to view checks only associated with the bank account.
Check Batch	Enter the check batch number for the check batch you want to print. Note: The first batch of checks you mark as eligible to print is numbered 1, as you mark more check batches eligible to print they are incrementally numbered.

Select Checks to Mark as Released State	Displays all the checks that meet your search criteria.
Transaction #	Displays the serial number for the transaction. Select the check box to select the check box for all the transactions that display. Note: To select individual checks, select the check box for each transaction number.
Check Date	Displays the date printed on the check.
Control #	Displays the check number that will print on the check.
Payee Name	Displays the payee name.
Claim Number	Displays the claim number for the claim associated with this payment .
Amount	Displays the dollar amount of the check.
Account Name	Displays the bank account name.
Batch Number	Displays the batch number for the check batch. Note: The first batch of checks you mark as eligible to print is numbered 1, as you mark more check batches eligible to print they are incrementally numbered.
Select All	Select the button to select to reset the print check status to release state for all the checks that display.
Deselect All	Select the button if you want to remove the selection that you made and select new checks.
Refresh	Select to refresh the checks.
Mark as Released	Select to mark as released the selected checks.

Check Stocks Window: Advanced Options Tab

Use the Advanced Options tab to specify details about permanent data that displays on all checks.

To open   On the Check Stocks window, select the Advanced Options tab.

Field definitions

Fields on the Check

Print Payee Address on Check   Select the check box, if you want the payee's address to print on check.

Full Policy Number on The Check:	Select the check box if you want the policy number to be printed on the check
Print Claim No. on Check	Select the check box, if you want the claim number to display on the check.
Date of Claim on the Check	Select the check box, to print the date of claim on the check.
Format Date of Check with '-' on Check	Select the checkbox, if you want '-' to be used as a separator in the check date.
Check Date Format	From the dropdown select the format in which the date is printed on the check.
Insurer Name on the Check	Select the check box, if you want insurer name to be displayed on the check..
Print Memo on Check	Select the check box, if you want a memo to print on checks.
Date of Event on the Check	Select the checkbox, to print the date of event on the check.

Memo Settings

Note: This section gets enabled only when you select the Print Memo on Check check box.

Font Name	If you selected Print Memo on Check, select the font you want to use to print the memo.
MICR Font Size	Select the font size for the memo.
No. of Rows for Memo	Enter the maximum number of text rows the memo can extend to.
No. of Characters per Memo Row	Enter the maximum number of characters in a row.

Pay to The Order Of Settings

Pay To The Order Sample Text	Enter a sample text which you can use to view how the text displays on the printed check sample and then adjust the settings as needed.
Font Name	Enter the text font in which the Pay to The Order Of text will be printed on the check.
Pay To The Order No. of Rows:	Enter the number of rows in which you want the Pay to The Order Of text to be printed on the check.
Pay To The Order Font Size:	Enter the size of the font in which the text is printed on the check.

No of Characters per Pay To The Order Row	Enter the maximum number of characters of the Pay to The Order Of text that can display in a row on the printed check.
Field on the Check Stub	
Print Control # on Check Stub	Select the check box, if you want the Control # to display on the check.
Print Adjuster Name and Phone # on Check Stub	Select the check box, if you want the Adjuster Name and Phone # to display on the check.
Agent Name and Address on the Check Stub:	Select the check box, to print the policy agent name and address on the check stub.
Full Policy Number on the Check Stub:	Select the check box if you want the policy number to be printed on the check stub.
Print Payee Tax ID on Check Stub	Select the check box, if you want the Payee Tax ID to display on the check.
Print Event # on Check Stub	Select the check box, if you want the Event # to display on the check.
Print Date of Check on Check Stub	Select the check box, if you want the Check Date to display on the check.
Date of Claim on Check Stub	Select the check box, if you want the claim date to display on the check.
Check Page Setup	
Suppress $ Sign	Select the check box, if you do not want a dollar sign to print on checks.
Print Claim insurer Instead of Payer	Select the check box, if you want the insurer paying for the claim to print on the check in place of a payer.
Pre-numbered Check Stock	Select the check box, if you want a check number to print on the check.
Payer Level For Checks	From the drop down list, select SysParm Client to use the payer name your system administrator set up in Utilities . Select one of the organizational hierarchy levels to use the organization you selected as the payer.

> Note: If you selected to roll up checks in Utilities, and if you select different payer levels for checks made out to the same payee, RISKMASTER will print separate checks for each payer level.

3- Part Check Address Settings

> Note: This option is available only if on the Alignment Options tab, you select the Check in the Middle button.

Blank	Select the button, if on the 3-part check you want the uppermost part to contain details, the middle part to contain the check, and the lowermost part to remain blank.
Payee Address	Select the button, if on the 3-part check you want the uppermost part to contain details, the middle part to contain the check, and the lowermost part to contain the payee address.
Payment Detail	Select the button, if on the 3-part check you want the uppermost part to contain details, the middle part to contain the check, and the lowermost part to contain payee details.

Print Checks Window: Print Check Batch Tab

Use the Print Check Batch tab to enter details about a check before printing the check.

To open	From the [Print Checks window](#), select the Print Check Batch tab.

Field definitions

Bank Account	From the drop down list, select the account from which you want to issue the checks.
Check Stock	From the drop down list select the check stock that you want to use for the checks.
First Check #	Displays the check number that will print on the check for the first check in the batch.
Check Date	Displays the date that will print on the check.
Check Batch	Enter the check batch number for the check batch you want to print. The first batch of checks you mark as eligible to print is numbered 1, as you mark more check batches eligible to print they are incrementally numbered.
Precheck Date	Displays the date on which you previewed the check batch on the Precheck Register tab.
# of Checks	Displays the number of checks RISKMASTER will print when you select the Print button.
Order Field	Displays the criteria to sort the checks.
Print	Select to print the check.

Re-Create Check File

Use the Re-Create Check File to recreate the check file by not changing the print date. Moreover, Re-Create Check File does not reprint the checks even if the option to print to printer and file is selected.

> Note: The window is visible only when the 'To File Only' or 'To Printer and File' option is selected on the Payment Parameter Setup window:Checks Options Setup tab, the Print Check To File Options drop down list.

To open	▪ From the main menu, select Funds.
	▪ From the Funds menu, select the Re-Create Check File.

Field definitions

Bank Account	From the drop down list, select a Bank Account.
Check Date	Displays the default current system date. The date to print on the check.
Check Batch	A system generated batch number automatically assigned to a grouping of checks selected through Precheck Register criteria. If you have run multiple pre-check registers for a bank before printing, the batch number will default to the batch number assigned to the last pre-check register you ran. If need be change the batch number to another.
Precheck Date	Displays the date you selected and marked the checks for the Precheck register.
# of Checks	A system generated batch number automatically assigned to a grouping of checks you selected through Precheck Register criteria.
Order Field	A protected field, displays the criteria for sorting the checks as you selected through the pre-check register order by field.
Re-Print	Select the Re-Print button to print a batch of checks that were placed in suspense through the Precheck Register's Preprint Acknowledgement window.

To Set Up Check Stock

 Before you can configure the way your checks look and the information on them, you must set up your bank accounts. You can set up checks for each bank account against which you will enter checks. For example, if you have several **checking account**s or **escrow account**s from which you issue payments, for each account you will require a separate account record and **check stock** .

You can also set up multiple check stocks for one bank account.

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, select the Bank Accounts.
    The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button .
    The Lookup Results window opens.

4. Select the bank account for which you want to create a check stock.
5. From the Bank Accounts window, select the Check Stocks button.
6. Select the Check Stocks button.
    The Check Stocks window opens.

7. Complete the fields on the

- Basic Options tab

- Check Image tab

- Alignment Options tab

- Advanced Options tab

8. From the toolbar, select the Save button .
9. Select the Print Sample button.
10. Select the Clone button to open the Clone Check Stock window to clone the check stock.

Note: You can create a copy of the current check stock settings for any existing Bank Account. You can select the current bank account or choose a different bank account from the list.

11. Select the Back to Bank Accounts button.
12. Save and close the Bank Accounts window.

Guidelines for Entering the MICR Number on Checks

Magnetic Ink Character Recognition (MICR) was developed to utilize the benefits of computer technology in the banking industry. Using MICR numbers enables automatic check sorting.

MICR font set has a total of 14 characters, ten specially designed numbers (0 through 9) and four special symbols (Transit, Amount, On-Us, and Dash).

Typed Character	Meaning	MICR Character
;		
	Transit Number	⑆
>		
	Amount	⑈
:	On Us	⑉
=	Dash	⑊
d	Check Number	0-9

To Set Up Schedule Date

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, select System Parameters.
   The System Parameters menu opens.

3. From the System Parameters menu, select Payment Parameter Setup.
   The Payment Parameter Setup window opens and a Payment Parameter Setup link displays under the Utilities node in the left navigation tree.

4. Select the Schedule Date tab.

5. Select the options you want on the Schedule Date tab , as shown below .

Use For Automatic Checks	Select the check box to add the Schedule Dates and Holidays while calculating print dates.
	Note: If you select the Use For Automatic Checks check box then another check box is added on the Schedule Automatic Check Processing: Scheduled Checks tab and selected by default to give user the permission whether to use the Schedule Dates and Holidays while calculating print dates or not. Also allow the user to have the option of having the current batch omitted from having the print date adjusted due to Schedule Dates, by not selecting this check box.
Use For Non-Occupationals Claim Payments	Select the check box to add the Schedule Dates and Holidays while calculating print dates.
	Note: If you select the Use For Non-Occupationals Claim Payments check box then another check box is added on the the Non-Occ Payments window and selected by default to give user the permission whether to use the Schedule Dates and Holidays while calculating print dates or not. Also allow the user to have the option of having the current batch omitted from having the print date adjusted due to Schedule Dates, by not selecting this check box.
Use For Combined Payments	Select the check box to add the Schedule Dates and Holidays while calculating print dates.
	Note: If you select the Use For Combined Payments check box then another check box is added on the Combined Payments form and selected by default to give user the permission whether to use the Schedule Dates and Holidays while calculating print dates or not. Also allow the user to have the option of having the current batch omitted from having the print date adjusted due to Schedule Dates, by not selecting this check box.
Options	Select the option for weekend payments which will apply for all the Schedule Dates.
	Note: The default option selected is Monday: Schedule Saturday and Sunday Checks for the following Monday.
	Select the button to enter the information into the fields on this window.
	Select the record from the table and then select the button to open the Schedule Dates window in edit mode.
	Select the record from the table and then select button to delete the Schedule Dates record.

6. Select the button on the window to save the change.

To Un-Clear Checks

You can change the status of checks marked as cleared back to printed.

To un-clear checks:

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Un-Clear Checks.

The Un-Clear Checks window opens and an Un-Clear Checks link displays under the Funds node in the left navigation tree.

3. On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to change the state from cleared to printed were issued.

4. Select the Include Collections check box, to display collection checks in the search results.

5. Select the Checks Not Attached to Claims check box, to display checks not associated with a claim .

6. From the Filter by Company drop down list, select an organization, if you want to view only the checks associated with the selected organization.

7. From the Filter By Bank Account drop down list, select a bank account, if you want to view only the checks associated with the selected bank account.

8. Select Refresh to see an updated list of checks based on your check searching criteria.
   The Select Checks to Mark as Un-cleared frame, displays all the checks that meet your search criteria.

9. Do one of the following:

   - To select all checks to marked as un-cleared, select the Select All button.

   - To remove the selection of all checks, select the Deselect All button.

   - To select individual checks to un-clear, select the check box, next to the Transaction number.

10. Select the Mark Un-cleared button to change the status of checks marked as cleared to printed state.

To Set Up Automatic Checks

You can set up an automatic check. You can then enter payment details and add third party payees, if any.

- [To Set up Automatic Checks](#)

- [To Enter Detailed Check Information](#)

- [To Enter Third Party Payments](#)

To Set up Automatic Checks

You must associate the payment with a claim number, a bank account, a payee type and the payee.

1. From the main menu, choose Funds.
   The Funds menu opens.

2. From the Funds menu, select Automatic Checks.
   The [Schedule Automatic Check Processing window](#) opens and an Automatic Checks link displays under the Funds node in the left navigation tree.

3. Select and complete the [Scheduled Checks tab](#) , as shown below .

   Claim Number

   Enter the claim number you want to associate with the payment or select the ⋯ button to search for a claim.

   [Claimant](#)   Displays the claimant associated with the selected claim.

   If there are multiple claimants, select the ⋯ button and select a claimant from the list of claimants.

   Unit   Displays the vehicle unit associated with the selected vehicle accident claim.

	If there are multiple units, select the ⋯ button and select a unit from the list of units for a Vehicle Accident claim.
Control Number	Enter the number your organization uses to track this data.
Bank Account	From the drop down list, select a bank account owned by the department responsible for this claim. RISKMASTER uses this bank account to pay the checks you are setting up.
	If no bank accounts are available, set up the bank account for the department before scheduling automatic checks.
Payee Type	From the drop down list, select the code that best describes the person receiving the check.
	If you select C-Claimant as the Payee Type, RISKMASTER automatically enters the payee information on this tab.
Last Name	If you did not select C- Claimant in the Payee Type field, select the ⋯ button to search for a payee.
First Name	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's first name.
Middle Name	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's middle name.
Tax ID	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's tax identification number.
Address	When you select a payee in the Last Name field, RISKMASTER automatically enters the address, city, state and zip details.
	You can enter a different Address also, as changes you make to the address here, do not affect the address record in the database.
Check Memo	Enter the text that you want print on the check.
Pay Interval	Enter the pay interval period or select the 🔍 button to select from the Code Selection window.
# of Payments	Enter the number of automatic checks you want to issue for this payment.
First Payment	Enter the date on which you want the first check to be issued or select the 🔲 button to select from the calendar.
Final Payment	Displays the last check date based on the # of Payments and the First Payment date you entered.
Freeze Payment Batch	Select the check box if you want to freeze payments for the check batch.

Enclosure	Select the check box if you will include other documents with the check. When you select the check box, "Enc" prints on the check.
Payees	Select the button open the code selection window and select payees for the selected payment Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction The available options in the field are and, 'attorney for' and 'as guardian of'. The first payee will not have a Payee List Phrase. Note: This field is enabled only when there are multiple payees for the transaction.
Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
EFT Payment	The check box is selected if the payment is to be made through electronic funds transfer.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
Gross Amount	Displays the total dollar amount the payee you entered on this tab will receive. If you entered third party payees, the gross amount is the total of all checks less the total amount that third party payees will receive.
Net Amount	Displays the total dollar amount of the entire payment including a total of all checks for all payees.
# of Third Parties	Displays the number of third parties you added to the payment on the Third Party Payees tab .
Third Party Total	Displays the total dollar amount you will pay to third parties.
# of Checks Printed	Displays the total number of checks that will be printed as part of this payment. This includes all scheduled checks for the payee and for all third party payees.
Printed Amount	Displays the amount that will print on the check.
Total # of Checks	Displays the total number of scheduled checks that will be printed as part of this payment. This includes checks for the payee and for third party payees.
Payment Grand Total	Displays the total dollar amount the payee will receive.

Adjust Print Date Using Schedule Dates	**The check box selected by default** adjusts the Print Date using the Scheduled Dates. Note: The Adjust Print Date Using Schedule Dates check box is visible, when the Use For Automatic Checks check box on the Payment Parameters Setup window: Schedule Date tab is selected. By selecting the check box user have the option to omit the current batch from having the print date adjusted using Schedule Dates.
Currency Type	Enter the currency type or select the search button [search icon] to select from the Code Selection window. By default the Claim Currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

4. From the toolbar, select the Save button [save icon].

5. From the toolbar, select the Enhanced Notes [notes icon] button to open the Enhanced Notes for the associated parent claim record.

   Note: The Enhanced Notes button is only visible when a claim number is entered.

To Enter Detailed Check Information

After you create an automatic check, you enter the payment amount, the reserve accounts debited, as well as other transaction details.

1. From the Schedule Automatic Check Processing window, select the Detailed Information tab.
2. Review the payments that display in the Payment Information frame.
3. To schedule another payment at the pay interval you selected on the Scheduled Checks tab, select the Add button.

   The payment displays on the Payment Information tab.

4. To add additional payments, from the Transaction Details for Future Payments table, select the New button

   [new icon].

   The Payment Detail Entry window opens.

5. Complete the fields on the Payment Detail Entry window , as shown below .

Currency Type	Displays the type of currency.
Transaction Type	Enter the reserve account to which you want to apply the payment, or select the [search icon] button to select from the Code Selection window.
Amount	Enter the payment amount. If you want to calculate the payment amount select the calculator button to open the calculator. To enter the amount from the calculator select the = button on the calculator.
Reserve Type	Based on the transaction type you selected, RISKMASTER displays the reserve type.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
Reserve Balance(Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.

The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

GL Account   Enter the general ledger fund from which you want to make this payment, or select the

🔍 button to select from the Code Selection window.

From and To   Enter the date range for the period of service or select the button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.

Invoiced By   Enter the name of the payee who sent you the bill.

Invoice Number   Enter the invoice number or any other identifying number that displays on the bill.

Invoice Amount   Enter the billing amount that displays on the bill.

Invoice Date   Enter the bill date that displays on the bill.

P.O. Number   Enter your organization's internal purchase order number.

6. Select the OK button.

The payment displays in the Transaction Details for Future Payments table on the Detailed Information tab.

To enter third party payees

If you want to pay part of an automatic payment to someone other than the person you set up in the Scheduled Checks tab, you can enter this information in the Third Party Payee tab.

Note: You must complete the Scheduled Checks tab and the Detailed Information tab before you complete the Third Party Payees tab.

1. From the Schedule Automatic Check Processing window, select the Third Party Payees tab.

2. From the Third Party Payments table, select the New button 📄.

The Third Party Payment Detail Entry window opens.

3. Complete the fields on the Third Party Payment Detail Entry window , as shown below .

Payee Details

Last Name   Enter the payee last name, or select the ••• button to open the Standard Entity Search window and select an entity.

First Name   Displays the payee entity's first name.

Middle Name   Displays the payee entity's middle name.

Tax ID   Displays the payee entity's Tax ID.

Address   Displays the payee entity's address.

City, State, Zip	Displays the payee entity's city, state and zip code.
Check Memo	Enter the text you want to display on the check.
Deduct Against Payee	Select the check box if you want to deduct the payment amount from the primary payee's payment and create a second check for the payment.
Third Party Payee Enclosure	Select the check box if you want to include other documents with the check. When you select the check box, "Enc" prints on the check.
Transaction	
Currency Type	...ys the type of currency.
Transaction Type	Enter the reserve account to which you want to apply the payment, or select the button to select from the Code Selection window.
Amount	Enter the payment amount.
Percent	Enter the percent of the reserve balance that you want to pay to the third party payee.
Enable Amount/Payment	Select to enable the Amount or Percent field, to enter a value. The corresponding field automatically displays a calculated value. For example, select Enable Percent to enter a percent value. The Amount field displays the calculated payment amount.
Reserve Type	Based on the transaction type you selected, RISKMASTER displays the reserve type.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the transaction type field.
Reserve Balance(Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field. The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.
GL Account	Enter the general ledger fund from which you want to make this payment, or select the button to select from the Code Selection window.
From and To	Enter the date range for the period of service or select the `...` button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.

Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and close this window.
Cancel	Select to close the window without saving the information you entered.

4. Select the OK button.

To Print Checks

To print checks, first complete the precheck register to preview the checks, then print the check batch, and then complete the postcheck register to print a report of the printed checks.

> Note: If you selected the option to roll up checks in Utilities , RISKMASTER will add up all checks to the same payee and print one check for the total amount made out to the single payee. If you void one of the checks from the rolled up checks, RISKMASTER voids all the checks in the roll-up.

To Complete the Precheck Register

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, select Print Checks.
    The Print Checks window opens and a Print Check link displays under the Funds node in the left navigation tree.

3. Select the Precheck Register tab.
4. From the Bank Account drop down list, select a bank account.
5. From the Order Field drop down list, select the criteria to sort the checks before printing.

Note: If you do not enter an order, RISKMASTER uses the default order for sorting.

6. Select the From Date check box.
7. In the From Date field, enter the date from which you want to print checks.

Note: If you do not select the From Date check box, the Precheck Register includes the earliest released payment in the check database .

8. Select the To Date check box.
9. In the To Date field, enter the last date for which you want to print checks.

10. In the Org. Hierarchy field, select the ⋯ button to open the Organization Hierarchy window and select a organizational hierarchy level based on which checks will be filtered.
11. From the Org Hierarchy Level (For Display Only) list, select the Organizational Hierarchy level you want to display on the precheck register.
12. To print checks do one of the following:

    - To print all checks, select the All Checks option.

    - To select checks to print, select the Select Checks option. Then select Choose to select checks from the Select Checks to Print window.

13. Select the Include Auto Payments? check box to print automatic payments.
14. To review the checks list that will print, select Preview.
15. Close the Print Preview window.
16. Select Print.

To Print a Check Batch

1. On the Print Checks window, select the Print Check Batch tab.
2. Select Print.
3. RISKMASTER prints the batch of checks and the Check Printing Completed Successfully? window opens.
4. If the checks print correctly, select Yes.
5. If the checks did not print correctly,

   - Select No.

   - In the Which Checks Failed to Print window, enter the first check that failed.

   - Select OK.

   - Select Close on the Print Checks window and correct the problem.

   - Restart the process of printing checks.

   - Manually destroy all duplicate checks

To Print the Post Check Register

1. On the Print Checks window, select the Postcheck Register tab.
2. In the Check Batch field, enter a batch number.
3. Select the Postcheck Register Type you want to print.

   - To print all information about the checks, select the Detail option.

   - To print only the check number and amount, select the Summary option.

   - To display sub account information for the checks you printed, select the Sub Account option.

4. Select Print.

| Tips |

To Void Printed Checks

You can void printed checks. The voided transactions remain in the RISKMASTER database for auditing purposes. After you void a transaction, you cannot undo the void status. If you decide that you voided the transaction in error, you must create a new transaction. You cannot reuse the check number of a printed check that you have voided.

> Note: If you void a check from a set of rolled up checks, all the checks in that set of rolled up checks are automatically voided .If a funds transaction is part of a rolled up check then all the funds transactions are voided and re-issued, void and reissue all the funds transactions .A list of all funds transactions that are a part of rolled up checks is displayed.

To void printed checks:

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Void Checks.
   The Void Checks window opens and a Void Checks link displays under the Funds node in the left navigation tree.

3. On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to void were issued.

4. Select the Include Collections check box, to display collection checks in the search results.

5. Select the Checks Not Attached to Claims check box, to display checks not associated with a claim .

6. From the Filter by Company drop down list, select an organization, if you want to view only the checks associated with the selected organization.

7. Select Refresh to see an updated list of checks based on your check searching criteria.

   The Select Checks to Void frame, displays all the checks that meet your search criteria.

8. Do one of the following:

   - To select all checks to void, select the Select All button.

   - To remove the selection of all checks, select the Deselect All button.

   - To select individual checks to void, select the check box, next to the Transaction number.

9. Select Void Checks.

10. In the Void Check Reason field, enter a valid reason for marking the check as void.

    Note: The Field will be visible only if Check Void Reason check box is selected in Utilities.

To Reset Printed Checks

Use the Reset Printed Check tab to reprint checks that are not legible or the payee name was spelled incorrectly on the check. Instead of offsetting and re-entering the payment, the Reset Printed Check window changes the print check status from printed to release state and then the payment is printed again in the another check batch or allows users to pre-checked again.

> Note: A Voided/Cleared Check, EFT Payments and Bank Accounts are not included in the list of checks that are to be reset from printed to release state. A set of rolled up checks will be marked as release.

To reset printed checks:

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Reset Printed Check.
   The Reset Printed Check window opens and a Reset Printed Check link displays under the Funds node in the left navigation tree.

3. On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to mark as release were issued.

4. Enter the check batch number for the check batch you want to print. The first batch of checks you mark as eligible to print is numbered 1, as you mark more check batches eligible to print they are incrementally numbered.

5. From the Filter By Bank Account drop down list, select a bank account, if you want to view only the checks associated with the selected bank account.

6. Select the Refresh button to see an updated list of checks based on your check searching criteria.

7. Do one of the following:

   - To select all checks to reset the print check status to release, select the Select All button.

   - To remove the selection of all checks, select the Deselect All button.

8. Select the Mark as Released button to mark the status of check as release.

To Clear Checks

You can clear the checks issued against a payment, to reconcile your bank statement.

1. From the main menu, choose Funds.

The Funds menu opens.

2. From the Funds menu, choose the Mark Checks Cleared.

   The <u>Mark Checks Cleared window</u> opens and a Mark Checks as Cleared link displays under the Funds node in the left navigation tree.

3. On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to clear were issued.

4. Select the Checks Not Attached to Claims check box, to display checks not associated with a claim .

5. From the Filter by Company drop down list, select an organization, if you want to view only the checks associated with the selected organization.

6. Select Refresh to see an updated list of checks based on your check searching criteria.

   The Select Checks to Clear frame, displays all the checks that meet your search criteria.

7. Do one of the following:

   - To select all checks to mark as cleared, select the Select All button.

   - To remove the selection of all checks, select the Deselect All button.

   - To select individual checks to mark as cleared, select the check box, next to the Transaction number.

To Re-Create Check File

Use the Re-Create Check File to recreate the check file by not changing the print date. Moreover, Re-Create Check File does not reprint the checks even if the option to print to printer and file is selected.

> Note: The window is visible only when the 'To File Only' or 'To Printer and File' option is selected on the Payment Parameter Setup window:Checks Options Setup tab, the Print Check To File Options drop down list.

To re-create check file:

1. From the main menu, select Funds.

   The Funds menu opens.

2. From the Funds menu, select the Re-Create Check File.

   The Re-Create Check File opens and a Re-Create Check File link displays under the Funds node in the left navigation tree.

3. Complete the fields on the <u>Re-Create Check File window</u>, as shown below:

Bank Account	From the drop down list, select a Bank Account.
Check Date	Displays the default current system date. The date to print on the check.
Check Batch	A system generated batch number automatically assigned to a grouping of checks selected through Precheck Register criteria. If you have run multiple pre-check registers for a bank before printing, the batch number will default to the batch number assigned to the last pre-check register you ran. If need be change the batch number to another.
Precheck Date	Displays the date you selected and marked the checks for the Precheck register.
# of Checks	A system generated batch number automatically assigned to a grouping of checks you selected through Precheck Register criteria.

Order Field	A protected field, displays the criteria for sorting the checks as you selected through the pre-check register order by field.
Re-Print	Select the Re-Print button to print a batch of checks that were placed in suspense through the Precheck Register's Preprint Acknowledgement window.

Checks Overview

Use RISKMASTER to set up and print checks for claim payments. You can also schedule automatic checks for future payments.

Each time you process checks, claim and policy data is updated to reflect currently applied payment amount.

Collection

Funds Management (Collections) Window: Transaction Tab

Use the Transaction tab to enter details about the collection and the associated payor , who is the person receiving the check.

To open	▪ From the main menu, select Document.
	▪ From the Document menu, choose any Claim type.
	▪ From the left navigation tree, select Financials link under the required claim node.
	▪ On the Funds window, select the Collection check box.
	Note: You can also open the window directly from the Funds Management window.

Field definitions

Control Number	Enter a unique ID for a payment. If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create payment transaction.
Collection	Select the check box to create collection transaction.
Void	Select the check box to void the current transaction and set all values to 0.
Cleared	Select the check box to mark the current transaction check as cleared.

Claim Number	Enter the claim number for the claim associated with this payment, or select the search button to search for the claim number.

> Note: If you open the Funds Management window from a Claim window, RISKMASTER automatically displays the claim number.

Transaction Date	Enter the date of the payment or select the ⊞ button to select from a calendar.
Bank Account	From the drop down list, select the bank account from which you want to make the payment.
Payee Type	From the drop down list, select the code that best describes the person who is receiving the check.
Claimant	Enter the Claimant or select the ••• button to open the Claimant Search window and search for a claimant.
Last Name	Enter the payee's last name or select the ••• button to open the Standard Entity Search window and search for a payee.

> Note: If you select a payee from the search results, RISKMASTER automatically enters the payee information in the fields.

Payees	Select the button open the code selection window and select payees for the selected payment

Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.

OFAC Check	Select to open the Specially Designated Nationals List Check window and view if the payee is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.
First Name	Enter the payee's first name.
Pay To The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Tax ID	Enter payee's Tax identification number.
Address	Enter payee's mailing address. Enter the City, State, and Zip in the appropriate fields.

> Note: If RISKMASTER automatically enters the address and you edit the address in the fields, the changes that you make will not update the payee's record in the database.

Enclosure	Select the check box if you want to include other documents with the check.

Note: When you select the check box, "Enc" prints on the check.

Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
	Note: Payee name along with claimant name separated by the separator End appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
Auto Check	Select the check box if you want checks or bills to be automatically issued for this transaction.
EFT Payment	This check box is selected if the payment needs to be made through electronic funds transfer.
Type of Bill	Enter the type of bill for which medical payments are generated for bill review fees or select the button to select from the Code Selection window.
	Note: The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.
Check Status	Enter the status of the check or select the button to select the code from the Code selection window.
Check Date	Display the date on the check.
Check Number	Displays the check number.
Check Memo	Displays the memo text that you want to print on the check.
Transaction Notes	Displays the additional comments.
Void Check Reason	Enter a valid reason for marking the check as void or select the button to open the RISKMASTER Editor and enter the reason for marking the check as void.
	Note: The Field will be visible only if Check Void Reason check box is selected in Utilities.
Detailed Tracking Claimant	**Displays the name of the** claimant.
	Note: The Detailed Tracking Claimant field will be visible only if **Use Carrier Claim Settings check box** is selected in Utilities.

Select the   button to load the claim.

> Note: For the records where funds are searched from the Search menu, the claim is loaded in the MDI tree and moreover from this funds window you can go back to the claim window.

Select the button to preview the check for single current transaction.

> Note: The Print Preview button appears on the toolbar before the check is printed for a transaction. You can view the check preview of the transaction before the check printing. Once the check is printed for a transaction , after that the Print Preview button would disappear from the toolbar.

Select the button to view the clone image of a printed check.

> Note: Once the check for a transaction is printed, the Clone Image of Printed Check button appears on the toolbar. User can view the check image even after the check was printed for a transaction. The view will contain all the checks in case the transaction is a part of rolled up check.

Select the button to open the Enhanced Notes for the associated parent claim record.

To Enter Collection Data

1. Search for the claim you want to add a collection for.
2. On the Claim window, select the Financials button.
   The Reserves window opens.

3. Select the Add Collection button.
   The Funds window opens and a Funds node displays in the left navigation tree.

4. Select and complete the fields on the Transaction tab, as shown below .

Control Number	Enter a unique ID for a payment . If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create payment transaction.
Collection	Select the check box to create collection transaction.
Claim Number	Enter the claim number for the claim associated with this payment, or select the search button to search for the claim number. If you open this window from a Claim window, RISKMASTER automatically displays the claim number.
Void	Select the check box to void the current transaction and set all values to 0.
Cleared	Select the check box to mark the current transaction check as cleared.

Transaction Date	Enter the date of the payment or select the button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payor Type	From the drop down list, select the code that best describes the person receiving the check.
Last Name	Enter the payor's last name or select the search button to search for a payor. If you search for a payor, RISKMASTER automatically enters the payor information on the tab.
OFAC Check	Select to open the Specially Designated Nationals List Check window and view if the payor is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.
Payees	Select the button open the code selection window and select payees for the selected payment
	Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
First Name	Enter payor's first name.
Pay To The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Tax ID	Enter payor's tax identification number.
Address	Enter payor's mailing address, enter the City, State, and Zip in the appropriate fields.
	If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payor's record in the database .
Enclosure	Select the check box if you want to include other documents with the check.
	When you select the check box, "Enc" prints on the check.
Auto Check?	Select the check box if you want bills to be automatically issued for this collection.
Include Claimant in payee	Select the check box to make the payment to the claimant along with any other payor you selected.
	Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.

EFT Payment This check box is selected if the payment needs to be made through electronic funds transfer.

Type of Bill Enter the type of bill for which medical payments are generated for bill review fees or

select the [🔍] button to select from the Code Selection window.

> The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.

Date

Enter the date on which you are adding the collection or select the [📅] button to select from a calendar.

Check Date

Enter the date on which you are adding the collection or select the [📅] button to select from a calendar.

Check Memo Enter text you want to print on the check.

Deposit Number Enter the deposit number for the collection.

Transaction Notes

Enter any additional comments or select the [✏️] button to open the RISKMASTER Editor and enter additional notes about the transaction.

Void Check Reason

Enter a valid reason for marking the check as void or select the [✏️] button to open the RISKMASTER Editor and enter the reason for marking the check as void.

> The Field will be visible only if Check Void Reason check box is selected in Utilities.

Detailed Tracking Claimant **Displays the name of the** claimant.

Note**: The Detailed Tracking Claimant field will be visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant will by default be selected as selected on "Financials/Reserves" grid, However, you may change it if you want to, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you will not be able to change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit Detailed Tracking Claimant. While editing the payment, user cannot change the Detailed Tracking Claimant as changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.

5. To add transaction details, From the Transaction Details tab,select the Add Transaction button.
    The Funds Split Detail window opens.

6. Complete the fields on the Funds Split Detail window , a s shown below .

Transaction Type Enter the reserve account to which you want to apply the transaction, or select the

[🔍] button to select from the Code Selection window.

Reserve Type Displays the reserve type for the reserve account.

Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the [🔍] button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the buttons to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoiced Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
First And Final Payment	By Default, First & Final Payment check box will always be disabled and unchecked for collections Note: The field is read-only by default. You can create the First And Final Payment without making a reserve. A reserve still need to be created but it will be created when needed while making payments.
Policy	From the Policy drop down list, select the name of policy.
Unit	From the Unit drop down list, select the generic unit.
Coverage	Enter the type of coverage for the reserve account or select the [🔍] button to select from the Code Selection window.

7. Select OK.

   The Transaction Detail tab on the Funds Management window displays the details of the payment .

To Work with Collection Data

To Edit Collection Data

1. Search for the claim you want to edit a collection for.
2. From the left navigation tree, under the required claim node, select the Financials link.
   The Reserves window opens.

3. Select the Payment History button.
   The Payment History window opens.

4. From the list that displays, select the control number link for the transaction that you want to edit.
   The Funds window for the selected collection opens.

5. Select the Collections check box.

6. Edit the information in the fields.

7. From the toolbar, select the Save button ![save] .

8. To edit transaction details, on the Transaction Details tab, select the ![edit] button.
   The Funds Split Details window opens.

9. From the Transaction Type drop down list, select the reason for the collection.
10. In the Amount field, enter the dollar amount of the collection.
11. Complete any other required fields.
12. Select OK.
    On the Funds Management window the Transaction Detail frame displays the detail of the transaction.

To Delete a Collection

1. Search for the funds transaction for which you want to delete transaction details.
   The Funds window opens.

2. From the Transaction Detail tab, select the link for the collection that you want to delete.

3. Select the ![delete] button .
   RISKMASTER deletes the selected collection.

Collections Overview

You can use RISKMASTER to track collections. You can enter collections while processing claim or claimant information, or you can first enter collections and then associate them with claims . You can also enter a collection without setting up reserves for claims.

To enter a collection for a claim, use the Add Collection button on the Reserves window.

Payment

Supervisor Approval Of Funds Transactions Window

Use the Supervisor Approval of Funds Transactions window to approve transactions for your subordinates who do not have authority to issue checks beyond a certain **incurred** limit.

To open	▪ From the main menu, select Funds.
	▪ From the Funds menu, choose Approve Transactions.

Field definitions

Funds Transactions Available For Approval, Void , Or Denial	Displays the details of the payments you can approve, void or deny.
	Select the check box for the transaction that you want to approve, void, or deny.
	Note: Select the check box in the table header to select or deselect all transactions in single instance.
Control1#	It enables a filtered search for and selected funds transactions using the control number.
Transaction Date	Displays the reserve account date to which RISKMASTER will apply this payment.
Payee	Select the payee for the selected payment.
Primary Claimant	If there are multiple claimants for this claim, select the check box if you want this claimant to be the primary claimant.
Claim #	Displays the claim number.
Amount	Displays the payment amount.
User	The one who processes the claim.
Transaction Type	Displays the reserve account to which RISKMASTER will apply this payment.
Split Amount	It shows the split amount for a fund transaction.
From Date	Displays the date from which the service starts. For example, for a hospital stay, displays the admission date.
To Date	Displays the date on which the service ends. For example, for a hospital stay, displays the discharge date.
Comments	Enter comments about the transaction.
Submitted to	Enter the name of the contact to whom the transaction was reported.

Hold Reason	The reason for holding the transaction.
Reserve Type	Select this field to identify the reserve type of transaction.
Print Report	Select the button to print a report of the funds transactions that you have denied.
Deny	Select the button to reject funds transaction for the reserve.
Approve	Select the button to approve the selected payment processing or check printing.
Void	Select the button to void a selected funds transaction without readjusting the reserve.
Print Report	Select the button to print a report of the funds transactions that you have approved, voided or denied.
Void Check Reason	Enter a valid reason for marking the transaction as void or select the button to open the RISKMASTER Editor and enter the reason for marking the transaction as void.
	Note: This field is displayed only when the Check Void Reason check box is selected in Utilities.
Funds Transactions Available For Denial Only	Displays the details of the payments that you can deny.
	Select the check box for the transaction that you want to deny.
Deny	Select the button to reject funds transaction for the reserve.
Submit To	Displays the name of the user for whom the payment is submitted.
Print Report	Select the button to print a report of the funds transactions that you have denied.
Policy Currency	Displays the payment amount.

Funds Split Detail Window

Use the Transaction Detail Entry window to enter payment or collection details. RISKMASTER displays the details you enter on this window in the Transaction Detail frame on the Funds Management window.

To open

From the Funds Management window: Transaction Details tab, select the button.

Field definitions

Currency Type	Select the lookup button to select a new currency type in which you want to enter the transaction split amount.

> Note: If the payment is not associated with a claim the Currency Type will default to Base Currency.

Exchange Rate Enter the new exchange rate based on which you want to calculate or convert the amount from selected currency into base currency.

Note: If the exchange rate entered has a variance of more than 10 % than the actual rate defined in the system, a warning message is displayed. If you select the OK button on the warning window, the exchange rate specified here overrides the exchange rate in the system table.

First And Final Payment The First And Final Payment check box is checked automatically and read only. This option lets you create a First And Final Payment, which means you can make a payment without setting a reserve beforehand. When you create the payment, the reserve is created on the fly.

Note: When you open the Funds Split Details window from the claim navigation tree without selecting a reserve from the financial/reserve grid, the 'First & Final Payment' check box is selected automatically and is read only. If you do not want this check box to be selected, open the Funds window (Funds menu > transaction) and search for a claim, and then uncheck the 'first & Final Payment' check box.

Policy From the Policy drop down list, select the name of policy.

> Note: The Policy field is only visible when **the Use Carrier Claim Settings check box is** selected in Utilities.

Unit From the Unit drop down list, select the generic unit.

> Note: The Unit field is only visible when **the Use Carrier Claim Settings check box is** selected.

Coverage Enter the type of coverage for the reserve account or select the 🔍 button to select from the Code Selection window.

> Note: The Coverage field is only visible when **the Use Carrier Claim Settings check box is** selected.

Transaction Type Enter the reserve account to which you want to apply the transaction, or select the 🔍 button to select from the Code Selection window.

Reserve Type Displays the reserve type for the reserve account.

> Note: This field is read-only by default. To be able to modify the reserve type in this field, in RISKMASTER Utilities, on the General System Parameter Setup window, select the Use Res Type to Filter Trans Type check box.

Reserve Balance Displays the balance remaining in the reserve account you selected in the Transaction Type field.

Note: The Reserve Balance is shown as zero for first and final payment. For payments other than first and final payment, the Reserve Balance is the actual reserve balance for the selected reserve.

Reserve Balance (Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.

> Note: The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the 🔍 button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the 🔲 button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and display the information in the Transaction Detail frame on the Funds Management window.
Cancel	Select to close the window without saving the information you entered.

Tips

Apply Payments to Coverages Window

Use the Apply Payments to Coverages window to apply claim payments to polices, or remove payments from policies when you either process or void a check, or add or remove a policy from a claim.

> Note: If no checks have been processed for a claim, selecting or removing a policy from a claim has no effect on dollar amounts applied to or removed from a policy.

To open	■ From the main menu, select Funds.
	■ From the Funds menu, choose Apply Payments to Coverages window.

Field definitions

From Date	Select the check box and enter a start date if you want to display only the claims with claim dates between the From Date and the To Date.
To Date	Select the check box and enter an end date if you want to display only the claims with claim dates between the From Date and the To Date.
Claim Number	Displays the claim numbers for claims with claim dates that occur between the From Date and the To Date you specified.
Claim Date	Displays the Claim date.
Process	Highlight a Claim Number and then select the Process button to recalculate payments associated with the selected claims against applicable insurance policies.

> Note: Use the shift key to select multiple adjoining claims. Use the Ctrl key to select multiple non-adjoining claims.

Close	Select to close the window without processing.
Help	Select to open the online help.

Payment History Window

Use the Payment History window to view past payment transactions. You can also **void** single transaction on this window.

> Note: You can sort and filter data on the window as per the available field. You can also enter the parameters based on which you want to filter the data.

To open   From the Reserves window, select the Payment History button.

Field definitions

[filter icon]	From the Filter drop down list, select the operator you want to apply to objects to filter required data.
<text boxes>	Enter the object in the text field to filter required data.
Control #	Displays the control number link for the payment transaction.

> Note: You can select the control number link to open the Funds Management-Payments window.

Check #	Displays the check number for the payment.
Trans Date	Displays the date of the payment.
Type	Displays the funds transaction type, such as Payment or Collection.
Clr?	Displays No to indicate if the payment is not marked as cleared. Displays the date when check is cleared in case the payment is marked cleared.

Void?	Displays Yes or No to indicate if the payment is marked as voided.
Status	Displays the check status.
Payee	Displays the name of the payee.
Check Amount	Displays the check dollar amount.
From Date	Displays the start date for the period of service.
To Date	Displays the end date for the period of service.
Stop Pay	Displays whether the payment for the transaction was stopped or not.
Invoice #	Displays the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Displays the total invoice amount of the transaction as displayed on the bill.
Check Memo	Display the text you have chosen to print on the check
Transaction Type	Displays the reserve account to which RISKMASTER will apply this payment.
Split Amount	Displays the line item for a payment.
Manual Check	Displays the status whether for a payment, check was selected to be entered manually or not. The system will set the status of the check for the payment to printed. .
User	Displays the RISKMASTER user name of the user who entered payment details.
Check Date	Displays the date that will print on the check.
First & Final Payment?	Displays 'Yes' if the payment is a first and final payment and 'No' if it is not. The First And Final Payment means the payment was created without setting a reserve beforehand. The reserve was created on the fly when the payment was created.
Combined Payment?	Displays 'Yes' if the payment is a combined payment and 'No' if it is not for this claim.
Net Total	Displays the net total dollar amount of all checks for this claim.
Total Payments	Displays the total dollar amount of all payment checks for this claim.

Total Collections	Displays the total dollar amount of all collection checks for this claim.
Total Voids	Displays the total dollar amount of all voided checks for this claim.
Back to Financials	Select to open the Reserves window.
Auto Checks	Select to open the Schedule Automatic Check Processing window.
Print	Select to print the payment history report.
Back to Claim	Select the button to return back to open the claim window.
	Note: This button is visible on the Payment History window when you navigate through Search > Funds > on the Funds window from the toolbar, select the Go To Payment History button.

Tips

To Approve Funds Transactions

1. From the main menu, select Funds.
    The Funds menu opens and a Funds node displays in the left navigation tree.

2. From the Funds menu, select Approve Funds Transactions.
    The Approve Transactions window opens.

3. From the Search Funds Transaction Details frame, search for the funds transaction.
    The Payments tab displays all on hold payments that matches the search criteria and the Collection from LSS tab displays all Legal Solution Suite (LSS) collections that are on hold.

4. From the Supervisor Approval Of Funds Transactions section, select the check box(s) against the funds transactions.

5. Do one of the following:

    - To approve the payment processing or check printing for the selected transaction, select the Approve button.

    - To reject the funds transaction for the reserve for the selected transaction, select the Deny button.

    - To void a selected payment without readjusting the reserve, select the Void button. In the Void Check Reason field, enter the reason for voiding the payment.

6. In the Void Check Reason field, enter a valid reason for marking the check as void.
    Note: The field will be visible only when on the Payment Parameter Setup window: Check Options tab, the Check Void Reason check box is selected.

7. Select the Print Report button.
    RISKMASTER prints a report of the denied, approved and voided funds transactions.

Tips

To Void Payments

You can void single payments by completing the following steps.

> Note: After you void a payment , you cannot undo the void status. If you decide that you voided a payment in error, you must create a new payment. You also cannot reuse the check number of a printed check that has been voided.

To void a payment

1. Search for the claim associated with the payment you want to void.
2. From the left navigation tree, under the required claim node select the Financials link.
   The Reserves window opens.

3. Select the Payment History button.
   The Payment History window opens.

4. Select the transaction you want to void.
   The Funds Management window opens.

5. On the Transaction tab select the Void check box.
   A window opens and displays a warning message.

6. Select OK.
   On the Funds Management window, next to the Void field, Yes displays.

Tips

To Apply Payments to Coverages

1. From the main menu, select Funds.
   The Funds menu opens and a Funds node displays in the left navigation tree.

2. From the Funds menu, select Apply Payments to Coverages.
   The Apply Payments To Coverages window opens and displays the claims to which payments are attached.

3. To enter the date range to display in the claim, from the From Date and To Date fields, select the check box and enter the claim date range.
4. To display the claims within the date range you selected, select the Refresh List button.
5. To attach the payments to the applicable insurance coverage for the claim , do one of the following:

   - To select all the claims that display, select the Select All button.

   - To de-select all the claims, select the Un-Select All button.

   - To select individual claims, select the check box for each claim.

6. Select Process.

Tips

To Edit Payment Data

1. Search for the claim associated with the payment you want to void.

2. From the left navigation tree, under the required claim node select the Financials link.
   The Reserves window opens.

3. Select the Add Payment button.
   The Funds Management- Payments window opens.

4. In the Control Number field, enter the control number for the payment you want to change and then press Enter.
   RISKMASTER updates the other fields on the Funds Management window.

5. Select the Transaction Detail tab.
6. Select the transaction you want to edit.
7. Select Edit.
   The Payment Detail Entry window opens.

8. Edit the information in the fields.
9. Select OK.
   The Funds Management window opens.

10. From the toolbar, select the Save button .

To Enter Payment for a Claim

You can enter a payment for a claim directly from the claim window.

1. Search for the claim associated with the payment you want to void.
2. From the left navigation tree, under the required claim node select the Financials link.
   The Reserves window opens.

3. Select the Add Payment button.
   The Funds Management window opens.

4. Select and complete the fields on the Transaction tab , as shown below.

Control Number	Enter a unique ID for a payment. If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create payment transaction.
Collection	Select the check box to create collection transaction.
Void	Select the check box to void the current transaction and set all values to 0.
Cleared	Select the check box to mark the current transaction check as cleared.
Claim Number	Enter the claim number for the claim associated with this payment, or select the button to search for the claim number.
	If you open the Funds Management window from a Claim window, RISKMASTER automatically displays the claim number.
Final Payment	Select the check box to mark all the reserves on the claim to a closed status.

The Final Payment check box is visible only if the Payment check box is checked. After the check is printed, the Final Payment check box is disabled.

Detailed Tracking Claimant	**Displays the name of the** claimant.
	Note**: The Detailed Tracking Claimant field is visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant is selected by default on the "Financials/Reserves" grid, but you can change it, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you cannot change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit the Detailed Tracking Claimant. While editing the payment, you cannot change the Detailed Tracking Claimant because changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.
Transaction Date	Enter the date of the payment or select the 🗓 button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payee Type	From the drop down list, select the code that best describes the person to whom you are sending the check.
	If you select Claimant, RISKMASTER automatically enters the claimant information on the tab.
	Note: This field displays when you select the Payment check box.
Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction
	The available options in the field are 'attorney for' and 'as guardian of'.
	The first payee will not have a Payee List Phrase.
	Note: This field is enabled only when there are multiple payees for the transaction.
Last Name	Enter the payee's last name or select the ••• button to open the Standard Entity Search window and search for a payee.
	If you search for a payee, RISKMASTER automatically enters the payee information on the tab.
First Name	Enter the payee's first name.
Payees	Select the button open the code selection window and select payees for the selected payment
	Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.

Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Tax ID	Enter the payee's tax identification number.
Address	Enter the payee's mailing address. Enter the City, State, and Zip in the appropriate fields.
	If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payee's record in the database .
Enclosure	Select the check box if you want to include other documents with the check. Selecting this option prints "Enc" on the check.
Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
Auto Check?	Select the check box if you want checks to be automatically issued for this payment.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
	Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
EFT Payment	This check box is selected if the payment needs to be made through electronic funds transfer.
Type of Bill	Enter the type of bill for which medical payments are generated for bill review fees or select the 🔍 button to select from the Code Selection window.
	The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.
Check Date	Enter the date that will print on the check or select the 📅 button to select from a calendar.
Check Status	Enter the code that best describes the status of the check or select the 🔍 button to select from the Code Selection window. If you select Hold the payment will not print.
Check Memo	Enter text you want to print on the check.
Check Number	Enter the check number that will print on the check.

Transaction Notes

Select the [icon] button to open the RISKMASTER Editor and enter additional notes about the transaction.

Currency Type

Enter the currency type or select the search button [icon] to select from the Code Selection window.

By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Void Check Reason

Select the [icon] button to open the RISKMASTER Editor and enter the reason for voiding the transaction.

The field will be visible only when on the Payment Parameter Setup window: Check Options tab, the Check Void Reason check box is selected.

[icon] Select the button to open the Print Single Check window, complete the fields and select the Print button to print a single check for the payment.

[icon] Select the button to open the Payee Experience window and view the number of payments, total amount of payments, and average amount of each payment made to the payee.

This link is displays, if you have previously made payments to this payee.

[icon] Select the button to load the claim.

Note: For the records where funds are searched from the Search menu, the claim is loaded in the MDI tree. From this funds window you can go back to the claim window.

[icon] Select the button to go back to Reserves window.

[icon] Select the button to go to Payment History window.

[icon] Select the button to preview the check for single current transaction.

Note: The Print Preview button appears on the toolbar before the check is printed for a transaction. You can view the check preview of the transaction before check printing. Once the check is printed for a transaction, the Print Preview button no longer displays on the toolbar.

[icon] Select the button to view the clone image of a printed check.

Note: Once the check for a transaction is printed, this Clone Printed Check button appears on the toolbar. You can view the check image even after the check is printed. The view contains all the checks in case the transaction is part of a rolled up check.

[icon] Select the button to open the Enhanced Notes for the associated parent claim record.

5. To add transaction details,On the Transaction Details tab, select the [ ] button.
    The Funds Split Detail window opens.

6. Complete the fields on the Funds Split Detail window , as shown below .

<table>
<tr><td>**Currency Type**</td><td>Displays the type of currency.</td></tr>
<tr><td></td><td>Note: If the payment is not associated with a claim the currency type will default to Base Currency.</td></tr>
<tr><td>**First And Final Payment**</td><td>The First And Final Payment check box is checked automatically and read only. This option lets you create a First And Final Payment, which means you can make a payment without setting a reserve beforehand. When you create the payment, the reserve is created on the fly. This option is available only when General System Parameters->Use carrier Claim setting is ON</td></tr>
<tr><td></td><td>Note: When you open the Funds Split Details window from the claim navigation tree without selecting a reserve from the financial/reserve grid, the 'First & Final Payment' check box is selected automatically and is read only. If you do not want this check box to be selected, either you can first select the reserve from financial/reserves grid on Claim navigation tree and then navigate to Funds window by selecting "Add New Payment" button on the toolbar or open the Funds window (Funds menu > transaction) and search for a claim, and then uncheck the 'first & Final Payment' check box.</td></tr>
<tr><td>**Policy**</td><td>From the Policy drop down list, select the name of policy.</td></tr>
<tr><td></td><td>Note: The Policy field is only visible when **the Use Carrier Claim Settings check box is** selected in Utilities.</td></tr>
<tr><td>**Unit**</td><td>From the Unit drop down list, select the generic unit.</td></tr>
<tr><td></td><td>Note: The Unit field is only visible when **the Use Carrier Claim Settings check box is** selected.</td></tr>
<tr><td>**Coverage**</td><td>Enter the type of coverage for the reserve account or select the [ ] button to select from the Code Selection window.</td></tr>
<tr><td></td><td>Note: The Coverage field is only visible when **the Use Carrier Claim Settings check box is** selected.</td></tr>
<tr><td>**Transaction Type**</td><td>Enter the reserve account to which you want to apply the transaction, or select the [ ] button to select from the Code Selection window.</td></tr>
<tr><td>**Reserve Type**</td><td>Displays the reserve type for the reserve account.</td></tr>
<tr><td></td><td>Note: This field is read-only by default. To be able to modify the reserve type in this field, in RISKMASTER Utilities, on the General System Parameter Setup window, select the Use Res Type to Filter Trans Type check box.</td></tr>
<tr><td>**Reserve Balance**</td><td>Displays the balance remaining in the reserve account you selected in the Transaction Type field.</td></tr>
<tr><td></td><td>Note: The Reserve Balance is shown as zero for first and final payment. For payments other than first and final payment, the Reserve Balance is the actual reserve balance for the selected reserve.</td></tr>
</table>

Reserve Balance (Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.

> Note: The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the 🔍 button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the 📅 button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and display the information in the Transaction Detail frame on the Funds Management window.
Cancel	Select to close the window without saving the information you entered.

7. Select OK.

The Transaction Detail frame on the Funds Management window displays the details of the payment.

Tips

To Release a Payment

1. Search for the claim associated with the payment you want to void.
2. From the left navigation tree, under the required claim node select the Financials link.
   The Reserves window opens.
3. Select the Add Payment button.
   The Funds Management window opens.

4. In the Control Number field, enter the control number for the payment you want to change and then press Enter. RISKMASTER updates the other fields on the Funds Management window

5. From the Check Status field, select the search button to open the Code Selection window.

6. On the Codes Selection window, from the codes list, select R Released.

7. In the Check Date field, enter the date of the check.

8. In the Check Memo field, enter any text you want to print on the check.

9. From the toolbar, select the Save button [icon].

   The payment prints when you print the check batch.

To Customize Payment History window

1. From the main menu, select My Work

2. From the My Work menu, select Header Configuration

3. On the Header Configuration window, select Payment History Config tab

4. Select the check boxes next to fields you want to display on the Payment History window.

5. Enter the column header label for the field in the text box next to the field name.

6. Select the Save Configuration button to save the settings.

Payments Overview

You can use RISKMASTER to track claim payments and display a list of multiple payments that you have already entered.

To process a payment you have to:

▪ **Set up the payment**: You can set up a payment after you enter a claim. A payment always has only one payee and is associated with only one claim. The payment can be the sum of multiple split payments or line items, such as the sum of an itemized bill for legal services and copying fees.

▪ **Issue a check**: You can print the payment as a check after you enter the payment information. You can also schedule a batch of automatic payments with different dates, so that RISKMASTER saves the payment data for batch printing of checks.

You can void a payment at any time. If you wrote a check against the reserves for a claim, RISKMASTER increases the reserves by the amount of the voided check.

You can use RISKMASTER's Bill Review System (BRS) to control invoicing and billing information.

> **Note**: CSC recommends that you set up reserves for a claim before you process the payments. However using first and final payment you can create quick payments without creating reserves beforehand.

First and Final Payment Overview

Also when Carrier Claims functionality is used, you can make a payment directly under the coverage using the First and Final Payment feature. You can directly create a payment without setting a reserve beforehand. When you create a payment the reserve is created on the fly.

A First and Final payment can be made only when there is a claim associated with a claimant, policy, unit, and coverage.

You can make multiple First & Final Payments under the same coverage based on unique reserve key criteria which include: Claim, Claimant, Policy, Coverage Type and Reserve Type.

You cannot edit detailed tracking claimant, policy, coverage type and reserve type information after the payment is saved

First and Final payments are not available for Scheduled Checks.

Mail Merge

Tips

To Create a Mail Merge Document

You can open a mail merge template from a record and insert record data into the template to create a mail merge document.

> Note: You must first set up a mail merge template before you can open the mail merge template from a record and create a mail merge document. The preference options setting on the Use Merge Letter window is preserved; when ever you open the Mail Merge, the setting by default is set to the previous time setting by that particular user.

To create a mail merge document

1. From any record window (like a General Claims window), open the record you want to associate the mail merge document with.

2. From the toolbar, select the Mail Merge button [W].
   The Filter Merge Letter window opens.

3. To specify the type of mail merge document you want to create, complete the fields on the Filter Merge Letter window as necessary.
   The Use Merge Letter window opens.

4. From the Letter Name drop down list, select the mail merge form letter template you want to use

5. Select other options you want to use.

6. Select Next.
   The Merge Template Document Attachment window opens.

7. Select the Launch Merge button.
   Your mail merge document opens in Microsoft Word.

8. Add, edit or review the contents of the mail merge document.

9. You can save and print this document.

Tips

To Set Up a Merge Form Letter Template

In RISKMASTER you must first create a mail merge template before you can open the mail merge template from a record and create a mail merge document.

1. From the main menu, select User Documents.
   The User Document menu opens.

2. From the User Document menu, choose Word Merge Setup.
   The Available Merge Form Letters window opens and a Word Merge Setup link displays under the User Documents node in the left navigation tree.

3. From the Available Merge Form Letters window, select the New button.
   The Edit Merge Letter wizard opens.

4. In the Edit Merge Letter wizard, respond to the questions and enter options into the fields.

5. Select the Next button on each window of the Edit Merge Letter wizard

Note: The Next button automatically displays when you complete the required fields.

6. Select the Next button on each window of the Edit Merge Letter On the Edit Merge Letter wizard: Create Merge Letter (4/4) window, select the Launch Word button.

    Microsoft Word opens with your mail merge template.

7. Select the Next button on each window of the Edit Merge Letter Add, edit or review the contents of the mail merge template.

8. Select the Next button on each window of the Edit Merge Letter > Select Save.

    RISKMASTER saves the mail merge template with a numbered file name.

Note: You have to remember this file name or change it. When you use the mail merge template you have to use the name you enter on the Edit Merge Letter wizard.

9. Select the Next button on each window of the Edit Merge Letter From the Word main menu, choose File > Close.

10. Select the Next button on each window of the Edit Merge Letter In RISKMASTER in the Edit Merge Letter wizard, select Finish.

    RISKMASTER adds the new mail merge template to your list of form letters on the Available Merge Form Letters window.

Tips

To Attach a Mail Merge Document to a Claim

You can automatically attach a mail merge document to a record when you create the mail merge document. You can also attach an existing mail merge document if you know the location of the mail merge document.

To attach the mail merge document when you create a mail merge document:

1. Open the record you want to attach the mail merge document to.

2. From the toolbar, select the Mail Merge button .
    The Filter Merge Letter window opens.

3. To specify the type of mail merge document you want to create, complete the fields on the Filter Merge Letter window as necessary.

4. Select the Next button.
    The Use Merge Letter window opens.

5. From the letter Name field drop down list, select the mail merge form letter template you want to use.

6. Select the Attach the resulting document to the current record check box.

7. Select Next.

    The Merge Template Document Attachment window opens.

8. Select the Launch Merge button.
    Your mail merge document opens in Microsoft Word.

9. Add, edit or review the contents of the mail merge document.

10. You can save and print this document.
    RISKMASTER automatically attaches the document to the associated record.

Set Up Auto Mail Merge Letters

1. From the main menu, select Utilities> Tools and Designers> Auto Mail Merge Setup

The Auto Mail Merge Setup window opens

2. On the Auto Mail Merge window, select the button to create a new mail merge definition.
   The Auto Mail Merge Creation- Step 1 of 5(Introduction) window opens.

3. Select the Next button

4. Select the auto mail merge templates you want to use

5. In the 'What do you want to call this auto mail merge definition?' field , enter a name for the definition.

6. From the ' Do not process mail merge templates for records that were created before this date.' field, select the required date

7. Select the Next button

8. From the Available Filter field, select the filters based on which you want to select the records for creating mail merge.

9. Select the Add button to include the records in the Selected Filter field.
   The Add Auto Diary window opens based on the selected filter, on this window you can specify the parameters for the filter.

10. Select the Next button
    The 'New Auto Mail Merge - Step 3 of 5 (Select Template & Apply Additional Business Rule)' window opens.

11. Select the mail merge template you want to use

12. From the Available Filter(s) field select the filters available for the template and use the Add button to include in the Selected Filters field.

13. Select the Next button
    The New Auto Mail Merge- Step 4 of 5 opens.

14. From the Person Involved field select one or more Person Involved Types, such as "Driver Insured," "Passenger," "Injured Person" or "Driver Other." when one Person Involved Type is selected, and only one entity of the selected type is associated with the claim as a Person Involved, rmA generates one merged document.

15. From the Claimant Type field select one or more Claimant Types.

16. From the Defendant Type field select one or more Defendant Types.

17. From the Witness Types field select the required Witness Types.

18. Select the Next button

19. From the Following Printers are attached with the server' dropdown select the printer you want to use to print the mal merge letter.

20. From the Please Choose Paper Bin for Documents field, select the required paper bin.

21. Select the Finish button

To Schedule a Auto Mail Merge Task

1. From the View Scheduled Tasks window, select the **Schedule A New Task** button.
   The View Scheduled Task window opens.

2. From the Task Type drop down list, select the type of task as Auto Mail Merge.

3. In the Task Name field, enter the name of the task.

4. From the Schedule Type drop down list, select the type of schedule as required.

5. Complete the fields on the Schedule a DDS Task: One Time , as shown below:

   Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Cancel	Select the button to close the window without saving the changes.

6. Select the Save button.

The task is scheduled to run as per selected parameters.

Auto Mail Merge Setup Overview

This feature helps you to automatically generate documents for multiple claims at a time by specifying parameters without the need for a user to manually initiate the document creation process. Using the RISKMASTER Mail Merge feature, you can generate batches of documents based on pre-defined conditions. Using the Auto Mail Merge Setup feature you can set up a mail merge and then schedule the task to run automatically in Task Manager.

In the Auto Mail Merge process you cannot select specific records. Instead of by default including only the information in the first record found, the Auto Mail Merge process will create a document for each record.

Setting Merge Letter Details

1. From the main menu, select User Documents.

    The User Documents menu opens

2. From the User Documents menu, select Word Merge Email Details.

    The Word Merge Email Details window opens.

3. Select the [ ] button to create a new mail merge email setup.

    The Word merge Email Detail Setup window opens.

4. On the Email Template tab, From the Template field select the template you want to use for mail merge.

5. In the Email From Address field, enter the email address from which the email is sent.

6. On the Email Subject Tab, in the Text 1 field, enter the details for the email subject line.

7. From the Variable field select the claim/ event variables you want to use in the email subject. Note: You can include Adjuster email address in the text.

8. Select the Preview button to see a preview of the email.

9. On the Email Body Line tab, in the Text field enter the text to be included in the email body.

10. In the Variable field select the variables you want to include in the email body. Note: You can include Adjuster email address in the text.

11. Select the Save button.

Edit Merge Letter Wizard

Use the Edit Merge Letter wizard to create a mail merge template or edit an existing template. You have to create a mail merge template before you can open the **mail merge** template from a record and create a mail merge document.

You can create mail merge **templates** both in **Utilities** and in RISKMASTER . Contact your system administrator for user privileges in Utilities to create a mail merge template.

To open   From the Available Merge Form Letters window, select the New button.

Field definitions

Fields   Complete the fields and select the options to create a new merge letter.

Send Copy as Email	Select the check box if you want to send a copy of the merge letter via email to a designated type of recipient associated with the claim.
Designated Recipient	From the list of Entity/People types associated with the claim select the recipient for the document based on the entity type.

> **Note:** When you select the Adjuster option from the field, the Current Adjuster Only checkbox displays. Select the checkbox to send the email only to the current adjuster. When you select the Claimant option, then the Primary Claimant only checkbox displays. select the checkbox to send the email notification only to the primary claimant.

Next	Select the button to open the next window in the Edit Merge Letter wizard
Cancel	Select to close the Edit Merge Letter wizard.
Launch Word	On the Edit Merge Letter wizard: Create Merge Letter (4/4) window, select the button to open the merge form template in Microsoft Word.
Finish	Select the button to save the merge form template.
Policy LOB	Enter the code that best describes the insurance line of the policy.
	Note: The Policy LOB field help to search the policy with filter.

Edit Merge Letter Wizard

Use the Edit Merge Letter wizard to create a mail merge template or edit an existing template. You have to create a mail merge template before you can open the mail merge template from a record and create a mail merge document.

You can create mail merge templates both in Utilities and in RISKMASTER . Contact your system administrator for user privileges in Utilities to create a mail merge template.

To open	From the [Available Merge Form Letters window](#), select the New button.

Field definitions

Fields	Complete the fields and select the options to create a new merge letter.
Next	Select the button to open the next window in the Edit Merge Letter wizard
Cancel	Select to close the Edit Merge Letter wizard.
Launch Word	On the Edit Merge Letter wizard: Create Merge Letter (4/4) window, select the button to open the merge form template in Microsoft Word.
Finish	Select the button to save the merge form template.

Available Merge Form Letters Window

To open	▪ From the main menu, select User Documents.

▪ From the User Documents menu, choose Word Merge Setup.

Field definitions

Form Letters	Displays the existing mail merge form letter templates , associated with various data sources.
New	Select to open the Edit Merge Letter wizard and create a new mail merge template.
Delete	Select an existing form letter and then select this button to delete the selected form letter.

Filter Merge Letter Window

To open

On a open record window, from the toolbar, select the Mail Merge button .

Field definitions

What is the Jurisdiction Or State for the form?

▪ Select the All States check box if the mail merge document is applicable in all States of jurisdiction.

▪ Select the search button to open the States window and select a state where the mail merge document is applicable.

Type of merge document

Select the search button to open the Merge Doc Type window and select the type of merge document you want to use.

Format of merge document

Select the search button to open the Merge Format Type window and select the format of the merge document you want to use.

Next

Select to open the

Cancel

Select to close the window without selecting a filter.

Mail Merge Overview

You can create templates in RISKMASTER, called mail merge, to reproduce similar documents based on data from the RISKMASTER system. To create mail merge documents or customized letters in RISKMASTER, you have to

Set up a mail merge template: You have to use the Merge Form Letters Designer to create mail merge templates in RISKMASTER Utilities .

Open the mail merge template from a record and create a mail merge document: You can use an existing mail merge template to create a mail merge document for an existing record.

You can preserve the preference options setting on the Use Merge Letter window, when ever you open the Mail Merge, the setting by default is set to the previous time setting by that particular user.

For example, to send a letter of acknowledgement to claimants for each new claim entered, you can create a mail merge template using the claimant name and address fields. You can also use MS Word merge fields to add salutations, titles, current date and time, and so on to the mail merge template.

After you create a template, you can open it from a claim. RISKMASTER automatically fills claim data into the merge fields and creates a letter of acknowledgement. If a claim is associated with multiple claimants, RISKMASTER creates a letter, from the mail merge template, for each claimant and person involved.

You can include any RISKMASTER fields, including supplemental fields in your mail merge template. You can also limit user or a group access to a particular mail merge document, through the RISKMASTER Utilities module .

Note: If you are using a SQL database for RISKMASTER, the title of a mail merge cannot exceed 25 characters.

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Financial Detail History

For Carrier Claims

1. From the Claim window, select the [button icon] button.

   For Corporate Claims

2. From the reserves/ financials window, select the Financial Detail History button.

   The Financial Detail History window opens.

3. Select the Level field select the level for which you want to see the financials detail.

Date/Time	Displays the date and time of the transaction
Trans Type	Displays the transaction type
Policy Name	Displays the policy name of the policy associated with transaction
Unit	Displays the unit associated with the policy for the transaction
Coverage type	Displays the coverage type of the policy
Cause/ type of Loss	Displays the cause/type of loss os the policy associated with transaction
Financial type	Displays the financial type of the policy associated
Claimant	Displays the claimant associated with the transaction
Amount (USD)	Displays the amount of the transaction
Amount in Claim currency	Displays the amount in the selected claim currency

4. Select the Back button.

Deductible Tracking

For Applying Aggregate Deductibles

- It will be applicable for third party deductibles

- Coverage Group will be assigned to each unique combination of policy/Insurance line.

- Two different policy/insurance line combinations can belong to the same Cover-age Group.

- Aggregate limit/ Aggregate Deductible limit will be defined for each Coverage Group.

- Aggregate limit/ Aggregate Deductible limit for the selected coverage will be the maximum amount of the deductible amount for all the coverages which belong to the same Coverage Group.

- Aggregate limit Aggregate Deductible limit will be applicable for all the coverage for policy/insurance Line/coverage which comes under same Coverage Group.

- 'Exclude Expense Payments' option will be available. In case the user needs to exclude/include expense payments at group level. It will override the exclude expense payment option set on the Deductible Summary window.

- The Controls/Fields related to Aggregate/Shared deductibles are only available on the UI if 'Enable Shared/Aggregate Deductibles For Third Party' is selected in LOB parameters setup.

- The 'Annual Statement' and 'Product Line' fields are displayed on the Policy System Data tab of Policy>Unit>Coverage window. Deductible amount will be defined at group level and will be applicable for all coverages within the same group on the same event.

- **For the policies which are downloaded on General Claims:**

- Policy (Policy Number, Symbol, Module, Master Company, Location) + Insurance Line + Unit (STAT_UNIT_NUMBER) + Coverage (Coverage Type Code (rmA Short Code), Sub-Line Code (Iif available) , ASL (if available), Product Line (if available))

- Note: If Coverage Type Codes are duplicate, Sub-Line Code will always be populated at POINT.

- **For the policies which are downloaded on WC Claims**

- Policy (Policy Number, Symbol, Module, Master Company, Location) + Insurance Line + Unit (STAT_UNIT_NUMBER) + Coverage (Coverage Type Code (rmA Short Code), Class Code (if available), ASL (if availa-ble), Product Line (if available))

For Applying Subrogation/ Salvage (other recoveries)

The Deductibles are applied

- to all reserve types associated to the parent called Recovery.

- hen the amount recovered is greater than the total paid.

- Recoveries are entered as collections in rmA.

- When collection/recovery is saved with non-zero deposit number.

- to 3rd party deductibles

For Applying Diminishing Deductibles

- Diminishing Deductibles will only be applied for 'First Party' Deductibles.

- Deductible amount will be reduced by the diminishing % specified/calculated as per the rules defined.

- Reduced amount will only be deducted on the payments of claim.

- There will be two Diminishing Type, Basic and Enhanced.

- Diminishing Deductible will be implemented based on the selected diminishing type.

- Controls/Fields related to Diminishing deductibles will only be available on the rmA UI if 'Enable Diminishing Deductibles For First Party' is selected in LOB parameters setup.

For Viewing History of Deductibles

1. Deductible change history will be maintained on Deductible summary window.

2. A new Deductible history button on the grid will be available for each record on deductible summary window.

3. Deductible history will display the Deductible Type, Diminishing Type, Amount, Exclude Expense Payments, Date Changed and User.

4. Default row will be created in the history table when the deductibles data is downloaded from Policy to the each individual claim.

Applying Deductible on Payment

1. Open the Financials/Reserves window for the claim for which you want to apply deductible to payment.

2. Select the ![D] button to open the Deductibles Summary

   The Deductibles Summary window displays the list of all the policy \unit\coverages downloaded from POINT policy system for the claim along with the deductibles information.

   Deductible information can be modified on Deductible Summary window for the required policy\ unit\ coverage

   Select a deductible record from the list, the details are displayed.

   - Deductible Type, Amount and Exclude Expense Payments, Diminishing Type and Claimant field will be editable and user can override the initial value downloaded from POINT system.

   - Remaining Amount field will display the remaining deductible on the selected coverage.

   - The changes made for deductibles at claim level will be updated at claim level only. rmA Policy tracking data/information will not be updated.

   - Deductible information (Deductible Type, Amount, Diminishing Type and claim-ant etc) will be editable only till the first payment for the selected Policy, Unit and Coverage is made on the claim.

   - Claimant for deductible reserve will be selected on deductible details window. Default claimant on deductible will be the first claimant added on the claim.

   - Deductibles will be applied while printing a payment from rmA. Deductible will be applied on payments as per the business rules.

   - $0.00 check will not be printed and the status will be updated to 'P Printed' when 'Prevent Printing Zero or Negative Amount Checks and Set to Printed' and 'Calculate Deductible on Payments' are selected on LOB Parameters Set-up>Deductible options .

   - The Exclude Expense Payments' check-box is displayed on the Deductible Summary window in case the user needs to exclude/include expense payments while applying deductibles on payments.

   - 'Exclude Expense Payments' check-box is available on the Coverage Group Detail window as well. For third party coverage under group. In case the user needs to exclude/include expense payments at group level. It will override the exclude expense payment flag set at the Deductible Summary window.

5.

To Define Code Relationship for Deductible

To Define Code Relationship for Deductible

Note: The Code Relationships window is visible only when the Use Carrier Claims check box is selected on the General System Parameter Setup window: Carrier Claim Settings.

1. From the main menu, select Utilities.
    The Utilities menu opens.

2. From the Utilities menu, select Managers.
    The Managers menu opens.

3. From the Managers menu, select Code Relationships.
    The Code Relationships window opens.

4. Complete the fields on the Code Relationships window, as shown below.

Relationship Type	From the drop down list select the relationship type as Deductible Type to Coverage Type.
Deductible Type	Select the deductible type code which you map to a coverage type.
Coverage Type	Select the coverage type code which you want to map to the selected deductible type
Available	From the list, select the coverage type to save mapping.
Related	Display the claim type (s)/loss component (s) you selected.
`>>`	Select the button to add all the available coverage types to the Related field.
`>`	Select the button to add the selected available coverage types to the Related field.
`<<`	Select the button to remove all the coverage type from the Related field.
`<`	Select the button to remove the selected coverage types from the Related field.
💾	Select the save button to save the changes made to the window.
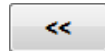
Setup Deductible

1. From the main menu, select Utilities
    The Utilities menu opens.

2. From the Utilities menu, select System Parameters.
    The System parameters menu opens,

3. From the System Parameters menu, select the Line of Business Parameters Setup.
    The Line of Business Parameter Setup window opens

4. Select the Deductible options tab.
5. Complete the fields on the Deductible Options tab based on the table given below.

Calculate Deductible on Payments	Select the checkbox to enable Deductible Processing functionality.
Deductible Reserve Type	Select the reserve type for which you want to create the deductible.
Deductible Transaction Type	Select the transaction type for which you want to create the deductible. The collections will be created that are deducted from the payment amount and offset the deductible reserve balance will be created as per the selected transaction type and with Printed status and non-zero deposit number.
Diminishing % Per Year	Enter the value in this field will be used to populate the default value for diminishing % applied.
Prevent Printing Zero or Negative Amount Checks and Set to Printed	Select the checkbox if you want a zero amount check not to be printed and the status will be updated to P Printed
Deductible Recovery Identifier Character	Value/Character specified in this field will be used to generate control number for deductible recovery. Value will be appended as suffix in the control number of its associated payment with underscore
Enable Diminishing Deductible For First Party	When this flag ('Enable Diminishing Deductibles For First Party') is selected then Diminishing Deductibles Processing feature will be available in RMA. All controls related to Diminishing Deductible will be hidden.
Enable Shared/Aggregate Deductible For Third Party	When this flag ('Enable Shared/Aggregate Deductibles For Third Party') is selected then Shared And Aggregate Deductibles Processing feature will be available in RMA. All controls related to Shared And Aggregate Deductible will be hidden.
Enable Distribution of Deductible Amount To Subsequent Payments) when Payment Is Voided For Third Party	When this flag ('Enable Distribution of Deductible Amount To Subsequent Payment(s) when Payment Is Voided For Third Party') is selected then deductible amount applied on the voided payment will be distributed to the subsequent payments added after the payment which is voided.

Security Management Settings for Deductibles

1. On the Security Management System window, open the General Claims node or the Workers' Compensation Claims node in the Module Security Group.
2. Select the Allow Edit of Deductible checkbox to enable users of the selected module security group to modify the deductible information downloaded from the POINT system.
3. Select the Allow Edit of Deductible Type checkbox, to enable users to modify the deductible type of the deductible.
4. Select the Allow Edit of Ded/SIR checkbox to allow the users to modify the deductible or SIR details.

Note: Deductible information can be modified only till the first payment on the claim is not made from rmA.

Editable and Non-Editable fields

Following fields will be editable/non-editable based on configuration settings.

6. Deductible Type.

7. Ded/Sir Amount.

8. Diminishing Type.

9. Diminishing %.

10. Claimant.

11. Exclude Expense Payments.

Modification of the Deductible Type and Ded/Sir Amount can be controlled individually with the child node settings.

For Aggregate Deductibles, select the 'Prevent Edit of Aggregate Deductible Limits Info' checkbox to disable user/module group to edit the of "Aggregate Deductible Limits" information.

When this checkbox is selected, "Aggregate Deductible Limits" window can not be edited by the user/specific groups.

Following fields will be editable/non-editable based on configuration settings.

12. Coverage Group.

13. Aggregate Deductible Limit.

14. Set Coverage Group and Aggregate Deductible limit for all coverages at Policy Level.

15. Deductible (Per Event).

Under the Transaction node, select the Allow Override Deductible Processing checkbox to allow users or the module security group to override or modify the deductible processing for the specific payment or recovery.

For Coverage Group Maintenance

1. Open the Coverage Group Maintenance section under the Security Management System for the required module access group
2. Select the Create New, Edit, Delete or View checkbox to grant permissions to the selected user or module group for the coverage group.

Deductible Overview

 You can now track and process deductibles in RISKMASTER Accelerator. The deductible tracking and processing modules enables you to extract rmA Funds information into a table that will be used to send data to a third party billing system. The Deductible Summary button is available on the Reserves Listing window that displays the Deductible Summary window. In addition, settings are available in SMS to setup deductibles.

Select the Allow Edit of Deductible check box to enable users of the selected module security group to modify the deductible information downloaded from the POINT system.

Select the Allow Edit of Deductible Type check box, to enable users to modify the deductible type of the deductible. Select the Allow Edit of Ded/SIR checkbox to allow the users to modify the deductible or SIR details.

Move Financial

Move Financial

To Move Financials

Move Financials window

To Open the Move Financials window,

1. From the Reserves/ Financials window, select the reserve you want to move and then select the Move Financials button from the tooolbar.
2. On the Move financial window, you can move financials or move reserve.
3. On the Move Financial tab, select the source and target for move financial at different levels of policy, unit, and coverage. The source and target selected is validated based on the matching criteria and against duplicate financial key.
4. Select the Add Mapping button to add the chosen levels of policy, unit, or coverage to the grid.
5. Select the Remove Mapping button, to remove the selected mappings in the grid.
6. If source is mapped to any target then source node and all its children will be disabled. On removing mapping for source the corresponding node in tree and its children will be enabled

Move Reseves tab

16. You can change claimant and loss type (or disability type). This runs move financial in background for that single reserve from a claimant or loss type to other available.
17. If you need to change reserve amount or status then you should do this from the existing the Edit Reserve window.

Overview

Using this feature you can move financial information of the system, which allow system to update financial key of a reserve.

This helps to

18. Move financial data across policy, insured unit, and coverage within a claim.

19. Move financials by edit of reserve keys on reserve screen. The reserve keys include claimant and loss type (non-wc claims) or disability type (wc claims).

Document Management

User Documentation Management

In you can manage and work with attachments efficiently.

Use RISKMASTER to attach files to records. You can use text documents, sound files, images or any other files you can save on your computer. You can view, print, or detach user documents and attachments.

The features like Mail Merge, Media Content Management etc facilitate better management and optimized usage of attachments.

Mail Merge

Mail Merge Overview

You can create templates in RISKMASTER, called mail merge, to reproduce similar documents based on data from the RISKMASTER system. To create mail merge documents or customized letters in RISKMASTER, you have to

Set up a mail merge template: You have to use the Merge Form Letters Designer to create mail merge templates in RISKMASTER Utilities .

Open the mail merge template from a record and create a mail merge document: You can use an existing mail merge template to create a mail merge document for an existing record.

You can preserve the preference options setting on the Use Merge Letter window, when ever you open the Mail Merge, the setting by default is set to the previous time setting by that particular user.

For example, to send a letter of acknowledgement to claimants for each new claim entered, you can create a mail merge template using the claimant name and address fields. You can also use MS Word merge fields to add salutations, titles, current date and time, and so on to the mail merge template.

After you create a template, you can open it from a claim. RISKMASTER automatically fills claim data into the merge fields and creates a letter of acknowledgement. If a claim is associated with multiple claimants, RISKMASTER creates a letter, from the mail merge template, for each claimant and person involved.

You can include any RISKMASTER fields, including supplemental fields in your mail merge template. You can also limit user or a group access to a particular mail merge document, through the RISKMASTER Utilities module .

> Note: If you are using a SQL database for RISKMASTER, the title of a mail merge cannot exceed 25 characters.

To Create a Mail Merge Document

You can open a mail merge template from a record and insert record data into the template to create a mail merge document.

> Note: You must first set up a mail merge template before you can open the mail merge template from a record and create a mail merge document. The preference options setting on the Use Merge Letter window is preserved; when ever you open the Mail Merge, the setting by default is set to the previous time setting by that particular user.

To create a mail merge document

1. From any record window (like a General Claims window), open the record you want to associate the mail merge document with.

2. From the toolbar, select the Mail Merge button .
    The Filter Merge Letter window opens.

3. To specify the type of mail merge document you want to create, complete the fields on the Filter Merge Letter window as necessary.
    The Use Merge Letter window opens.

4. From the Letter Name drop down list, select the mail merge form letter template you want to use

5. Select other options you want to use.

6. Select Next.
    The Merge Template Document Attachment window opens.

7. Select the Launch Merge button.
    Your mail merge document opens in Microsoft Word.

8. Add, edit or review the contents of the mail merge document.

9. You can save and print this document.

Tips

To Attach a Mail Merge Document to a Claim

You can automatically attach a mail merge document to a record when you create the mail merge document. You can also attach an existing mail merge document if you know the location of the mail merge document.

To attach the mail merge document when you create a mail merge document:

1. Open the record you want to attach the mail merge document to.

2. From the toolbar, select the Mail Merge button .
    The Filter Merge Letter window opens.

3. To specify the type of mail merge document you want to create, complete the fields on the Filter Merge Letter window as necessary.

4. Select the Next button.
    The Use Merge Letter window opens.

5. From the letter Name field drop down list, select the mail merge form letter template you want to use.

6. Select the Attach the resulting document to the current record check box.

7. Select Next.

The Merge Template Document Attachment window opens.

8.   Select the Launch Merge button.
     Your mail merge document opens in Microsoft Word.

9.   Add, edit or review the contents of the mail merge document.

10. You can save and print this document.
     RISKMASTER automatically attaches the document to the associated record.

Tips

To Set Up a Merge Form Letter Template

In RISKMASTER you must first create a mail merge template before you can open the mail merge template from a record and create a mail merge document.

1.   From the main menu, select User Documents.
     The User Document menu opens.

2.   From the User Document menu, choose Word Merge Setup.
     The Available Merge Form Letters window opens and a Word Merge Setup link displays under the User Documents node in the left navigation tree.

3.   From the Available Merge Form Letters window, select the New button.
     The Edit Merge Letter wizard opens.

4.   In the Edit Merge Letter wizard, respond to the questions and enter options into the fields.

5.   Select the Next button on each window of the Edit Merge Letter wizard

Note: The Next button automatically displays when you complete the required fields.

6.   Select the Next button on each window of the Edit Merge Letter On the Edit Merge Letter wizard: Create Merge Letter (4/4) window, select the Launch Word button.
     Microsoft Word opens with your mail merge template.

7.   Select the Next button on each window of the Edit Merge Letter Add, edit or review the contents of the mail merge template.

8.   Select the Next button on each window of the Edit Merge Letter > Select Save.
     RISKMASTER saves the mail merge template with a numbered file name.

Note: You have to remember this file name or change it. When you use the mail merge template you have to use the name you enter on the Edit Merge Letter wizard.

9.   Select the Next button on each window of the Edit Merge Letter From the Word main menu, choose File > Close.

10. Select the Next button on each window of the Edit Merge Letter In RISKMASTER in the Edit Merge Letter wizard, select Finish.
     RISKMASTER adds the new mail merge template to your list of form letters on the Available Merge Form Letters window.

Setting Merge Letter Details

1.   From the main menu, select User Documents.
     The User Documents menu opens

2.   From the User Documents menu, select Word Merge Email Details.
     The Word Merge Email Details window opens.

Word Merge Email Details

	Template	Email From Address	Email Subject Text 1	Email Subject Variable 1	Email Subject Text 2	Email Subject Variable 2	Email Body Text 1	Email Body Variable 1	Email Body Text 2	Email Body Variable 2	Email Body Text 3

No records to display.

3. Select the [ ] button to create a new mail merge email setup.

   The Word merge Email Detail Setup window opens.

4. On the Email Template tab, From the Template field select the template you want to use for mail merge.

5. In the Email From Address field, enter the email address from which the email is sent.

6. On the Email Subject Tab, in the Text 1 field, enter the details for the email subject line.

7. From the Variable field select the claim/ event variables you want to use in the email subject. Note: You can include Adjuster email address in the text.

8. Select the Preview button to see a preview of the email.

9. On the Email Body Line tab, in the Text field enter the text to be included in the email body.

10. In the Variable field select the variables you want to include in the email body. Note: You can include Adjuster email address in the text.

11. Select the Save button.

Edit Merge Letter Wizard

Use the Edit Merge Letter wizard to create a mail merge template or edit an existing template. You have to create a mail merge template before you can open the **mail merge** template from a record and create a mail merge document.

You can create mail merge **templates** both in **Utilities** and in RISKMASTER . Contact your system administrator for user privileges in Utilities to create a mail merge template.

To open   From the Available Merge Form Letters window, select the New button.

Field definitions

Fields	Complete the fields and select the options to create a new merge letter.
Send Copy as Email	Select the check box if you want to send a copy of the merge letter via email to a designated type of recipient associated with the claim.
Designated Recipient	From the list of Entity/People types associated with the claim select the recipient for the document based on the entity type.

> **Note:** When you select the Adjuster option from the field, the Current Adjuster Only checkbox displays. Select the checkbox to send the email only to the current adjuster. When you select the Claimant option, then the Primary Claimant only checkbox displays. select the checkbox to send the email notification only to the primary claimant.

Next	Select the button to open the next window in the Edit Merge Letter wizard
Cancel	Select to close the Edit Merge Letter wizard.
Launch Word	On the Edit Merge Letter wizard: Create Merge Letter (4/4) window, select the button to open the merge form template in Microsoft Word.

Finish   Select the button to save the merge form template.

Policy LOB   Enter the code that best describes the insurance line of the policy.

                                        Note: The Policy LOB field help to search the policy with filter.

Auto Mail Merge

Auto Mail Merge Setup Overview

This feature helps you to automatically generate documents for multiple claims at a time by specifying parameters without the need for a user to manually initiate the document creation process. Using the RISKMASTER Mail Merge feature, you can generate batches of documents based on pre-defined conditions. Using the Auto Mail Merge Setup feature you can set up a mail merge and then schedule the task to run automatically in Task Manager.

In the Auto Mail Merge process you cannot select specific records. Instead of by default including only the information in the first record found, the Auto Mail Merge process will create a document for each record.

To Schedule a Auto Mail Merge Task

1. From the View Scheduled Tasks window, select the [**Schedule A New Task**] button.
    The View Scheduled Task window opens.

2. From the Task Type drop down list, select the type of task as Auto Mail Merge.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as required.
5. Complete the fields on the Schedule a DDS Task: One Time , as shown below:
    Enter the Date and Time you would like to Run the Task on:

    Date   Enter the start date of the scheduled task or select the date from the
                                        calendar.

    Time   Enter the start time of the scheduled task.

    Cancel   Select the button to close the window without saving the changes.

6. Select the Save button.
    The task is scheduled to run as per selected parameters.

Set Up Auto Mail Merge Letters

1.   From the main menu, select Utilities> Tools and Designers> Auto Mail Merge Setup
    The Auto Mail Merge Setup window opens

2. On the Auto Mail Merge window, select the button to create a new mail merge definition.
    The Auto Mail Merge Creation- Step 1 of 5(Introduction) window opens.

3. Select the Next button
4. Select the auto mail merge templates you want to use
5. In the 'What do you want to call this auto mail merge definition?' field , enter a name for the definition.
6. From the ' Do not process mail merge templates for records that were created before this date.' field, select the required date
7. Select the Next button
8. From the Available Filter field, select the filters based on which you want to select the records for creating mail merge.
9. Select the Add button to include the records in the Selected Filter field.

The Add Auto Diary window opens based on the selected filter, on this window you can specify the parameters for the filter.

10. Select the Next button

The 'New Auto Mail Merge - Step 3 of 5 (Select Template & Apply Additional Business Rule)' window opens.

11. Select the mail merge template you want to use

12. From the Available Filter(s) field select the filters available for the template and use the Add button to include in the Selected Filters field.

13. Select the Next button

The New Auto Mail Merge- Step 4 of 5 opens.

14. From the Person Involved field select one or more Person Involved Types, such as "Driver Insured," "Passenger," "Injured Person" or "Driver Other." when one Person Involved Type is selected, and only one entity of the selected type is associated with the claim as a Person Involved, rmA generates one merged document.

15. From the Claimant Type field select one or more Claimant Types.

16. From the Defendant Type field select one or more Defendant Types.

17. From the Witness Types field select the required Witness Types.

18. Select the Next button

19. From the Following Printers are attached with the server' dropdown select the printer you want to use to print the mal merge letter.

20. From the Please Choose Paper Bin for Documents field, select the required paper bin.

21. Select the Finish button

User Documents and Attachments

Multi Media View

To Attach Document Using Multi Media View Document Management System

1. Search for the claim or event you want to attach/view document to, using media view.
   The event opens in the Event window or the claim opens in the Claim window.

2. From the toolbar, select the Attach Documents ![icon] button .
   The Media Management window opens.

3. On the Media Management window, select the Multi-Media tab.
   The Multi-Media tab opens.
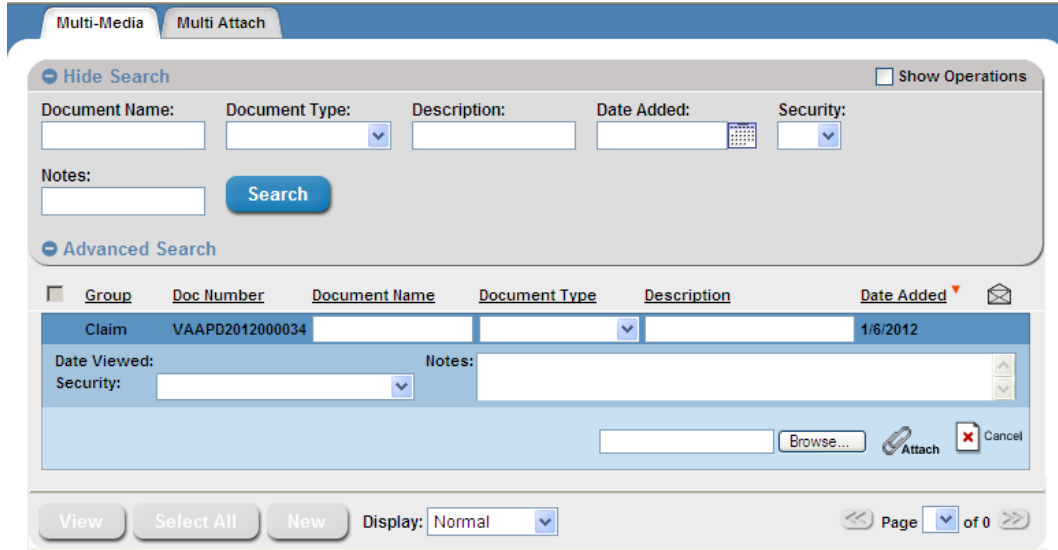
4.   On the Multi-Media tab, select the Hide Search option to hide search fields.

5.   Select the Show Search option to enter information in the search fields.

6.   Complete the fields on the Multi-Media tab as shown below:

Document Name	Enter the name of document for a claim or an event you want to view.
Document Type	From the Document Type drop down list, select the document type.
Description	Enter the description of the document you want to view.
Date Added	Enter the date or select the [calendar] button to select from the calendar
Advanced Search	Select the option for advance searching of a document.
Security	From the Security drop down list, select the security level.
	Note: The Security field drop down list display when the Advanced Search option is selected.
Notes	Enter notes for the document you want to view.
	Note: The Notes field display when the Advanced Search option is selected.
Show Operations	Check the check box to show more operations in the search field.
Search	Select the Search button to display the results of your search.

7.   To display the results of your search, select the Search button.
     Note: The search result get displayed on the Multi-Media tab.

8.   On the Multi-Media tab, select the New button to add a new document.

9.   Complete the required fields for attaching a new document on Multi-Media tab as shown below:

Document Name	Enter the name of document that you want to add.
Document Type	From the Document Type drop down list, select the document type.
Description	Enter the description of the document you want to add.
Security	From the Security drop down list, select the security level. Note: The Security field drop down list displays when the Advanced Search option is selected.
Notes	Enter any additional comments about the new document. Note: The Notes field displays when the Advanced Search option is selected.
Browse	Select the button to browse a file saved on your machine. From the Choose File window, navigate to the file and select the file to attach.
Attach	Select the button to attach a new document to the selected claim or event. Note: You can attach as many documents you want to by selecting the New button.
Cancel	Select the button to delete the new document entry.

10. Select the View button to view the attach document.
    Note: The attached file opens on the new window Media Management Retrieval. Only one document is viewed at a time. When multiple documents are selected the View button is disabled.
11. From the Display drop down list, select the display form in which you want to display the window.
12. Select the Select All button to select all the documents attached to the selected claim or event.
13. Select the Remove All button to remove all the attached documents to the selected claim or event.

To Attach Multiple Files

Note: Select the check box Use Media View Interface, to activate the Media Management window.

1. Search for the claim or event you want to attach/view document to, using media view.
   The event opens in the Event window or the claim opens in the claim window.

2. From the toolbar, select the Attach Documents button .
   The Media Management window opens.
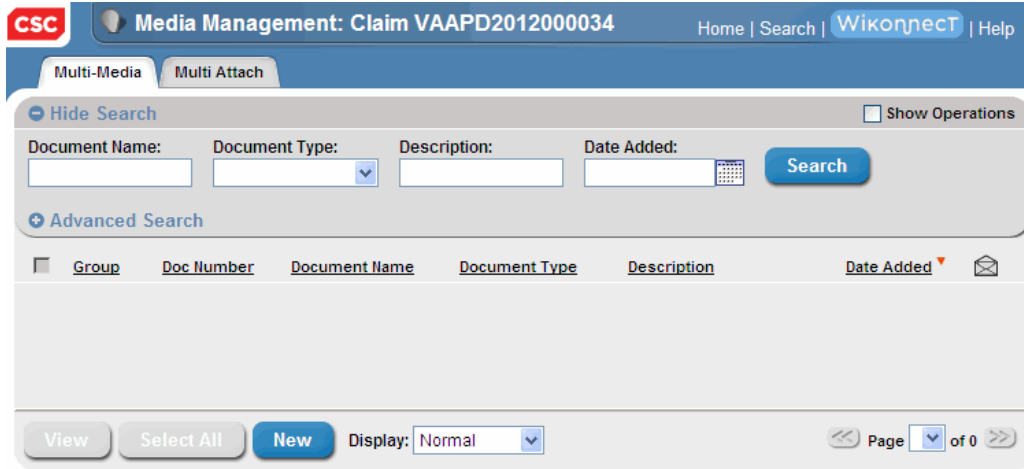
3. On the Media Management window, select the Multi Attach tab.

    The Multi Attach tab opens.
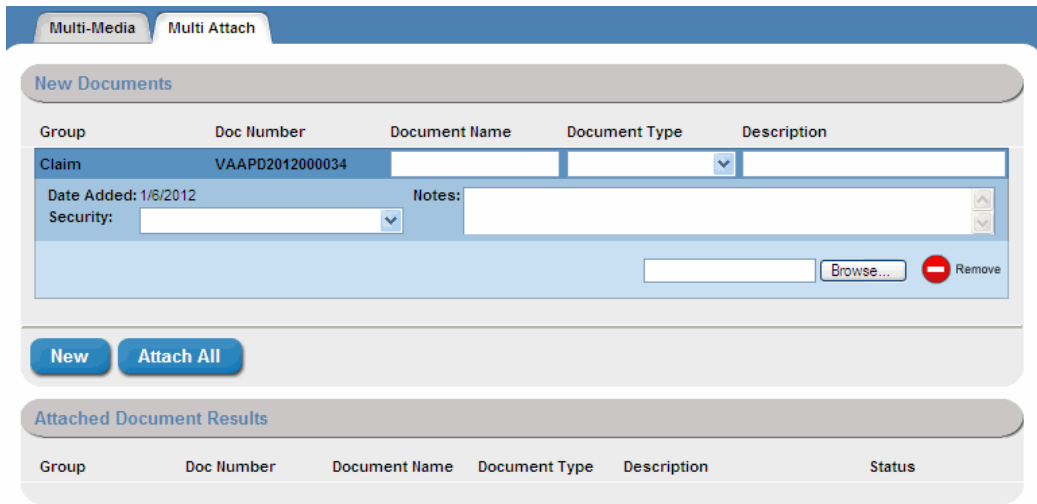
4. Complete the fields on the Multi Attach tab as shown below:

    Document Name   Enter the name of the document that you want to add.

    Document Type   From the Document Type drop down list, select the document type.

    Description   Enter the description of the document you want to add.

    Security   From the Security drop down list, select the security level.

                               Note: The Security field drop down list displays when the Advanced Search option is selected.

    Notes   Enter any additional comments about the new document.

                               Note: The Notes field displays when the Advanced Search option is selected.

Browse   Select the button to browse a file saved on your machine. From the Choose File window, navigate to the file and select the file to attach.

Remove   Select the button to delete the new document entry.

New   Select the button to add a new document to the selected claim or event.

Note: You can attach as many documents you want to by selecting the New button.

Attach All   Select the button to attach a new document to the selected claim or event.

> Note: All attached documents get displayed on the Multi Attach tab under the Attached Document Results field.

Funds Management

Funds Management Overview

Use RISKMASTER Funds Management to manage claim reserves, payments and collections through the complete claim life cycle. Collections are subrogation or recovery payments associated with a claim after offsetting checks or payments. You can enter a collection without setting up reserves for claims.

To process a payment you have to set up the payment and then issue a check. You can void a payment at any time after you create it. If the voided check was written against the reserves for a claim, RISKMASTER increases the reserves by the amount of the void check.

Reserves are the funds sets aside by insurance companies to assure that they can cover future liability. Reserves are also the total unpaid amount of claims reported on a specific accounting date. When you make a payment, RISKMASTER subtracts the payment amount from the reserve balance.

Using the Funds Management module you can set up bank accounts and print and schedule checks. You can set up account records and check stocks for your checking as well as escrow bank accounts and set up multiple check stocks for each bank account. You can also use the bank account reconciliation option to process data from your bank's electronic statement to balance your bank accounts with data in the RISKMASTER database. Funds management enables you to set up and print checks for claim payments, and also schedule automatic checks for future payments.

The RISKMASTER Funds Management module lets you control invoicing and billing information related to a payment. You can approve transactions for your subordinates who do not have authority to issue checks beyond a certain incurred limit, and print reports of pending payments, issued checks or Explanation of Benefits (EOB).

Combined Payments

Combined Payments Overview

Using this feature you can set entities as Combined Payment Entities. This helps in setting up payees to group their payments together with set printing schedules.

A Combined Payment can have only one Payee.;l;l

Check Printing lets you include Combined Payments in the check batch.

On the Print Checks window, you can select the Include Combined payments check box to create checks for combined payments.

To Setup Combined Payment

1. From the main menu, select Utilities.
   The Utilities menu opens.
2. From the Utilities menu, select Managers.
   The Mangers menu opens.
3. From the Managers menu, select Combined Payment.
   The Combined Payment Setup window opens.
4. Complete the fields on the Combined Payment Setup window: Combined Payment tab as shown below

Bank Account	From the drop down, select the bank account you want to set up for payment created for the vendor for combined payments.
	Note: **This will be the bank account for all a payments created for this vendor as a combined payment. It will override all other bank account filters including Account Owner, Policy, and Non-Occupational Plan. If it is not set up then the system will allow the user to select the bank account from the drop down list of valid bank accounts. Combined Payment funds transactions will only roll up per bank a**ccount.
Last Name	Enter the last name or select the ellipses button to select the last name of the vendor for which combined payment is being set.
Tax ID	Enter the Tax Identification number of the entity for which you want to set combined payment.
First Name	Enter the first name of the vendor.
Address 1	Enter the address of the vendor.
Address 2	Enter the alternate address of the vendor.
City	Enter the city of the vendor.
State	Enter the state of the vendor or select [icon] to select from the Code Selection window.
Zip	Enter the zip code of the city of vendor.
Country	Enter the country of the vendor.

5. Complete the fields on the Combined Payment Setup window: Schedule Setup tab as shown below

Pay Interval	Enter the frequency of the payment or select the [icon] button to select from the code selection window.
Starting On	Enter the date when the combined payment starts or select the calendar to choose the dates.
Next Print Override	Enter a date if you want to select a different print date than the calculated Next Scheduled Print, date.
Last Day of Month	Select the check box if you want to setup combined payment for the last day of the month.
	Note: This check box is selected when the frequency selected is Month(s) and the Starting On Date is the last day of the month. It can be unchecked and if it is unchecked then the number date will be used instead of the last day of the month. If the number date is greater than the largest number date for the month then the last day of the month will be used. For example if the number date is 30 then for Feb the system will use the 28th (or 29th in a leap year) and 30 for the rest of the months
Next Scheduled Date	Select the actual date for the next print.
	Note: This date can be different due to Weekends and Holiday Dates.
Next Scheduled Print	Select the next print date per the calculated schedule from the calendar.

6. Complete the fields on the Combined Setup window: Stop Payment tab as shown below

Stop As Of	Enter the date or select a date from calendar to stop combined payments for the current entity.
Stop Combined Pay	Select the check box to stop combined for the current entity.

7. From the tool bar, select the [icon] button to save the record.

Backup Withholding

Backup Withholding Overview

You can set up backup withholding on Entities in and split out payments to the withholding recipient. Backup withholding is set individually for each entity through the Entity Maintenance. When a payment is printed which has a backup withholding setup, the system displays a warning message stating that the amount of the payment is going to be reduced due to a withholding.

The rights to set up, modify, or delete a withholding setup is assigned in the Security Management System.

Backup withholding is created when a payment status changes to Printed. RISKMASTER does not apply withholdings for existing payments, with the exception of autochecks and non-occupational claim payments because these have not yet been printed. When printing checks for one of the payments in a withholding group the associated withholding payments must also be printed .

The parent payment and the backup withholding payment are treated as groups. If one is voided or cleared the whole group is voided or cleared. Child payments are voided if the parent payment is voided and parent payment is voided if a child payment is voided. A payment that is part of a withholding payment (parent or child) cannot be reissued. To reissue a check that is part of a backup withholding payment you must void and then enter the payment again.

If a payment is created which uses EFT then none of the payments in the withholding group can be voided.

Backup withholdings are limited to payments where the payee is either Other Payees (People & Entities) or Other Payees (Org. Hierarchy).

To Setup Backup Withholding

1. Search and open the entity record you want to setup backup withholding for.

2. From the toolbar select the [button] button.
    The Backup Withholding window opens.

3. Select the Enable Backup Withholding check box to activate backup withholding feature for the selected entity record.
4. In the Percentage field, enter the amount of payment to be reserved for selected entity or payee.
5. In the Recipient field, select the Ellipses button to open the Standard Entity Search window to select the entity that receives the withholding payment.
6. Select the Voucher Payment check box to set payment as check or voucher.
    > Note: The payment will be processed as a check however will not print a physical check from RMX.

7. Select the Save button to save changes.

Reserves

Reserves Overview

Use RISKMASTER to work with reserves, payments, and collections in a logical sequence that follows the life cycle of a claim . When you first record a claim, you create the opening reserve . You can subdivide the reserve into multiple categories, including expense and indemnity .

You can increase or decrease reserves whenever necessary. When you make a payment , the payment amount is subtracted from the reserve balance. When you close a claim, you can set RISKMASTER up to either reset the reserve balance to zero, the reserve amount to zero, or to leave it unchanged.

> Note: CSC recommends that you set up reserves for a claim before processing payments. RISKMASTER does not include claims without reserves in financial reports.

Reserve Categories

RISKMASTER uses different reserve categories for each line of business and for claimants. Your system administrator creates the categories when RISKMASTER is installed. In general, all user reserves are linked to two reserve categories:

- **Expense:** The reserves for expenses defined by your organization. This includes all reserves that are not considered indemnity reserves.

- **Indemnity:** The amount needed to indemnify your organization against the claim. The indemnity reserve can change over time for many reasons specified by your legal counsel and actuary.

Reserve Calculations

RISKMASTER calculates reserve balance and related data as shown next:

	For open claims	**For closed claims**
Reserve Balance=	When Collections are not taken into account: - Reserve Amount - Paid When Collections are taken into account: - Reserve Amount - Paid + Collections (if Collections are less than or equal to Paid) - Reserve Amount (if Collections are more than paid)	May be 0, or left unchanged based on the settings in Utilities
Total Incurred =	When Collections are not taken into account: - Greater of the Reserve Amount or Paid Balance When Collections are taken into account: - Greater of the (Reserve Amount - Collections) or Paid Balance	When Collections are not taken into account: - Greater of the Reserve Amount or Paid Balance When Collections are taken into account:

- Greater of the (Reserve Amount - Collections) or Paid Balance

Paid Balance=	Payments - Collections (if the difference is less than 0, then the Paid Balance will be 0	Payments - Collections (if the difference is less than 0, then the Paid Balance will be 0

Reserve Tracking Methods

Your system administrator can configure RISKMASTER to track reserves in either one of two ways:

- **Claim-level tracking:** Also called "gross-level" tracking. You can enter reserves and payments when entering or working with claims. Select this option to track reserves by claim only. This option is available for all four lines of business. You cannot track individual reserves for each claimant if you select this option.

- **Detail-level tracking:** Also called "claimant-level" or "unit-level" tracking. You can only record reserves and payments at the claimant or unit level. Detail-level tracking is designed for organizations that allocate costs at the most detailed level. This option is only available for General and Vehicle Accident claims.

- When using detail-level tracking for General claims, the Financials tab in the Claim window displays an aggregate of the claimant financials and is read-only.

- When using detail-level tracking for Vehicle Accident Claims, the Financials tab in the Claim window displays an aggregate of the claimant and the unit financials and is read-only.

  Note: CSC strongly recommends that you do not change your reserve tracking method once you start recording claims. If you have to change your reserve tracking method, do it at the start of your organizations fiscal year .

Auto Adjusting Reserves

Your system administrator specifies how reserves are maintained for open and closed claims. This influences the reserve reports you generate. Your system administrator can set your system to Auto Adjust Negative Reserves to Zero so that when you enter a payment that is greater than the Reserve Balance, RISKMASTER automatically raises the Reserve amount and maintains a zero balance and processes the payment. If your reserve history reports show many automatic adjustments to Reserves, consider raising your opening Reserve levels. You should also review your claims more frequently to manually raise the Reserve levels before an automatic adjustment is necessary.

Closed Claim Reserves

When setting up RISKMASTER, your organization can define the following settings for claim reserves when a claim's status is set to "Closed".

- **Set Reserve Balance to Zero:** Automatically adjusts the reserve balance to zero for any reserve amount

- **Set Reserve Amount to Zero:** Automatically adjusts the reserve amount to zero.

- **Set Negative Reserve Balance to Zero:** Automatically adjusts any negative reserve balance to zero.

- **Do Nothing:** Makes no change to the reserve amount or the reserve balance

The method your organization selects will have a significant effect on your reserve reports.

To Create a Reserve

1. Search for the claim you want to create a reserve for.
2. From the left navigation tree, under the required claim node select the Financials link.

3. The Reserves window opens.

4. From the list of reserves, select a reserve.
    The Reserve for claim window opens.

5. Complete the fields in the Reserve for claim window , as shown below .

Date	Enter the date on which the new reserve takes effect or select the button to select from a calendar. Usually this is the current date.
Reserve Amount	Enter the new reserve amount.
Status	From the drop down list, select the status of the claim.
User ID	Displays your RISKMASTER User ID. You can enter a different user ID if you want.
Reason	From the drop down list, select the reason why you are changing the reserve amount.
Currency Type	Select the lookup button to select a different currency for the reserves. The system converts the entered currency to claim currency.
	If the payment is not associated with a claim the currency type will default to Base Currency.

6. In the Date field, enter the date on which the new reserve takes effect or select the button to select from a calendar. Usually this is the current date.
7. n the Reserve Amount field, enter the new reserve amount.
8. In the Status field, from the drop down list select O for open.
9. In the User ID field, enter your RISKMASTER user ID. You can enter a different user ID if you want.
10. From the Reason drop down list, select the reason for creating the reserve.
11. In the Assigned Adjuster field, select the adjuster associated with the reserve.
12. From the Currency Type field, select the lookup button to select a different currency for the reserves. The system would convert the entered currency to claim currency.
13. Select Modify.

Add New Reserve Window- Carrier Claim

Note: The Add New Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

To open

From the Reserves window, select the Add New Reserve button.

Field definitions

Policy Name	From the drop down list, select the Policy Name.
Unit	From the drop down list, select the vehicle type for the reserve.
Coverage Type	From the drop down list, select the coverage type for the reserve.

Reserve Type	From the drop down list, select the reserve type.
Amount	Enter the reserve amount.
	Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.
	Currency Calculator : Converts user entered currency into claim currency for Reserve.
Currency Type	From the drop down list, select the status of the claim.
	Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.
	When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.
Reserve Sub Type	From the dropdown, select the code that best describes the type reserve sub category.
	Note: The option displayed in this field are based on the type selected in Reserve Type filed..
Loss Type	From the drop down list, select the code that best describes the loss.
	Note: This field will be part of the financial key.
Status	From the drop down list, select the reason why you are changing the reserve amount.
Reason	Select to save your changes and close the window.
OK	Select to close the window without saving your changes.
Add More	Select the button to create more reserves from the Add New Reserve Window without the need to navigate back to reserve window. When you select this button, the current reserve will be saved and the new reserve window will be reset to allow you add data for another reserve. If the reserve key for the reserve is duplicate, a warning message is displayed.
Cancel	**Select to close the window without saving your changes.Options on Add New Reserve window**
Collapse	Select to collapse the window.
Maximize	Select to maximize the window.
Close	Select to close the window.

Edit Existing Reserve Window - Carrier Claim

Note: The Edit Existing Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

To open

From the Reserves window, select the Edit Reserve button.

Field definitions

Policy Name   Displays the Policy Name attached to the claim..

Unit   Displays the code that best describes the vehicle type.

Coverage Type   Displays the coverage type for the reserve.

Reserve Type   Displays the reserve type.

Amount   Enter the reserve amount.

> Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.

> Currency Calculator : Converts user entered currency into Claim Currency.

Currency Type   Displays the Currency Type to show which currency type is being used.

> Note: By default, claim currency will display in the Currency Type field. If the payment is not associated with a claim, the currency type will default to Base Currency.

Reserve Sub-Type   From the dropdown select the code that best describes the type reserve sub category. Note: The options displayed in this field are based on the type selected in Reserve Type field.

Loss Type   From the drop down list, select the code that best describes the loss.

Note: This field will be part of the financial key.

Status   From the drop down list, select the status of the claim.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

> **When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.**

Reason   From the drop down list, select the reason why you are changing the reserve amount.

Add More   Select the button to create more reserves from the Add Reserve window without the need to navigate back to the Reserves window. When you select the button the current reserve will be saved and the Add New Reserve window will be reset to allow you to add data for another reserve. If the reserve key for the reserve is a duplicate,a warning message is displayed.

OK   Select to save your changes and close the window.

Cancel   **Select to close the window without saving your changes.Options on Edit New Reserve window**

Collapse   Select to collapse the window.

Maximize   Select to maximize the window.

Close   Select to close the window.

Reserve window- Carrier Claims

Policy Name   Displays Policy Name.

Unit   Displays the vehicle type for the reserve.

Coverage Type   Displays the coverage type for the reserve.

Reserve Type   Displays the reserve type.

Loss Type   From the drop down list, select the code that best describes the loss.

<u>**Note:**</u> This field will be part of the financial key.

Balance   Displays the reserve balance for each reserve category.

Reserve Type   Displays the type of the reserve.

Paid   Displays the payments that you have entered for claim or claimant.

Note: When you enter a payment, you have to select a Transaction Type code to determine the reserve category

Collections   Displays any income related to the claim for each reserve category.

Note: Recoveries or subrogation are also Collections.

Incurred   Displays the balance (plus payments less collections) for each reserve category.

Status   Displays the status of the claim.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to only. No payment /collection is allowed when the reserve status is set to Hold.

Change Amount   Displays the amount based on the Reserve History.

Amount   Enter the reserve amount.

> Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.

Reason   Displays the reason why you are changing the reserve amount.

OK   Select to save your changes and close the window.

Cancel   Select to close the window without saving your changes.

Transaction Details for Selected Reserve

Payee Name   Displays the name of the payee for the selected reserve.

Check Number   Displays the check number for the selected reserve

Date of Check   Displays the date of the check issue

Type   Displays whether a transaction is a Payment or a Collection

Transaction Type   Displays the transaction type of the transaction associated with reserve

Amount   Displays the amount of the transaction

Status   Displays the status of the transaction

Void   Displays whether the transaction was voided or not.

Stop Pay   Displays whether the payment for the transaction was stopped or not.

Control Number   Displays the Control number of the transaction associated with the selected Reserve.

Cleared	Displays whether the payment for the transaction was cleared or not.
	Select the button to add new reserve.
	Select the button to modify an existing reserve.
	Select the button to add payment.
	Note: When on the Security Management System window, the First and Final Payment checkbox is selected, you be able to make a payment without selecting a reserve. If the checkbox is not selected, you need to selec reserve from the reserve listing to make a payment.
	Select the button to add a collection.
	Select the button to view payment history.
	Select the button to view reserve history.
	Select the button to view the financial summary of the reserve.
	Select the button to view OFAC summary of the record.
	Select the button to view the reserve summary of the claim.
	Select the button to view the unit or coverage level financial summary.
	When you select this button, the Financial summary displays.
	From the Level dropdown list, select the Policy, Unit, or Coverage option to view financial summary for the claim for that le
	Select the button to open the Financial Detail History window to view financial history of the reserve.

To Edit a Reserve

1. Search for the claim for which you want to edit the reserve .
2. From the left navigation tree, under the required claim node, select the Financials link..
    The Reserves window opens.

3. From the list of current reserves, double click the reserve you want to edit.

The Compensation Reserve for claim window opens.

4. Enter the date on which the new reserve takes effect. Usually this is the current system date.

5. Edit the information in the fields.

6. Select Modify.
    The Reserves window displays the changed reserve amount.

To View Reserve History

1. Search for the claim with the reserve for which you want to view a history.
2. From the left navigation tree, under the required claim node, select the Financials link.
    The Reserves window opens.

3. From the list of current reserves, select the reserve for which you want to view a history.
    The [Compensation Reserve for claim window](#) opens and displays the history of the reserve you selected.

4. To return to the Reserves window, select Cancel.

Reserve Worksheets

To Activate Reserve Worksheet

1. From the main menu, select Utilities.
    The Utilities menu opens.

2. From the Utilities menu, choose System Parameters.
    The System Parameters menu opens.

3. From the System Parameters menu, choose Line Of Business Parameter Setup.
4. The Line of Business Parameter Setup window opens.

5. On the Line of Business Parameter Setup window: Reserve Options tab, in the Reserve Worksheet section, select the Use Reserve Worksheet check box to use the reserve worksheet for the specified line of business.

6. From the Disable Tollbar for selected Claim Types field, select the button to open the Code Selection window and select the claim types for which you want to disable the reserve worksheet toolbar on the Reserve Worksheet window.

7. To remove the selected claim type from the Disable Tollbar for selected Claim Types field, select the button.

8. Select the Attach PDF check box, if you want to attach the reserve worksheet as PDF to the specified line of business.

9. From Disable Toolbar for selected Claim Status field, select the button to open the Code Selection window and select the claim status for which you want to disable the reserve worksheet toolbar on the Reserve Worksheet window.

10. To remove the selected claim status from the Disable Toolbar for selected Claim Status field, select the button.

11. From the toolbar select the button.

To Create a Reserve Worksheet

1. Search for the claim for which you want to create reserve worksheet.
2. From the left navigation tree, under the required claim node, right click the Financial/ Reserves link.
3. From the pop up menu, select New Reserve Current.
   The Reserve Current window opens.

4. Select the reserve type tab for which you want to create reserve worksheet.

5. In the New Reserve Balance field, against the required Reserve Category enter the reserve balance.
6. In the New Reserve Amount field, enter the required reserve amount for the Reserve Category.

7. In the Reason field, enter the reason for modifying reserves or select the to open the Code Selection window and select the reason code.

8. In the Comments field, select the button to enter comments.
9. Select the Reserve Summary tab.
   The Reserves Current window: Reserves Summary tab opens.

10. In the Comments field, select the button to enter comments.

11. From the toolbar, select the button.

To Delete a Reserve Worksheet

You can only delete a reserve worksheet with Pending Approval status.

1. Search for the claim for which you want to delete the reserve worksheet.
2. From the left navigation tree right click the Financials/ Reserves link.
3. Select the link for the reserve worksheet you want to delete.
   The Reserve Current window opens.

4. On the Reserve Current window, from the toolbar, select the button.
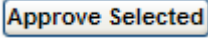
To Approve or Reject a Reserve Worksheet
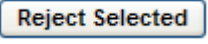
You can approve or reject reserve only when you have appropriate rights.

> **Note:** If you are authorised to approve or reject a reserve worksheet within the specified **Reserve Limit,** then you can also approve it from the Reserve Worksheet window.

To approve a reserve worksheet

1. From the main menu, select Funds.

    The Funds menu opens.

2. From the Funds menu, choose Reserve Approval.

    The Reserve Approval window opens.

3. Select the option for reserve worksheet you want to approve.

4. In the Reason field, enter the reason for approving the reserve.

5. Select the **Approve Selected** button.

To reject a reserve worksheet

1. From the main menu, select Funds.

    The Funds menu opens.

2. From the Funds menu, choose Reserve Approval.

    The Reserve Approval window opens.

3. Select the option for reserve worksheet you want to reject.

4. In the Reason field, enter the reason for reject reserve worksheet.

5. Select the **Reject Selected** button.

Tips

To Submit a Reserve Worksheet for Approval

1. Create a reserve worksheet.

2. On the Reserve Current window from the toolbar select the button.

    The Reserve Worksheet is submitted to the supervisor for approval.

    Note: You can also approve or reject a reserve worksheet you create from Reserve Currents window if you have the permissions to approve reserves within specified reserve limit.

1.

Payments and Collections

Payments Overview

You can use RISKMASTER to track claim payments and display a list of multiple payments that you have already entered.

To process a payment you have to:

- **Set up the payment**: You can set up a payment after you enter a claim. A payment always has only one payee and is associated with only one claim. The payment can be the sum of multiple split payments or line items, such as the sum of an itemized bill for legal services and copying fees.

- **Issue a check**: You can print the payment as a check after you enter the payment information. You can also schedule a batch of automatic payments with different dates, so that RISKMASTER saves the payment data for batch printing of checks.

You can void a payment at any time. If you wrote a check against the reserves for a claim, RISKMASTER increases the reserves by the amount of the voided check.

You can use RISKMASTER's Bill Review System (BRS) to control invoicing and billing information.

> **Note**: CSC recommends that you set up reserves for a claim before you process the payments. However using first and final payment you can create quick payments without creating reserves beforehand.

First and Final Payment Overview

Also when Carrier Claims functionality is used, you can make a payment directly under the coverage using the First and Final Payment feature. You can directly create a payment without setting a reserve beforehand. When you create a payment the reserve is created on the fly.

A First and Final payment can be made only when there is a claim associated with a claimant, policy, unit, and coverage.

You can make multiple First & Final Payments under the same coverage based on unique reserve key criteria which include: Claim, Claimant, Policy, Coverage Type and Reserve Type.

You cannot edit detailed tracking claimant, policy, coverage type and reserve type information after the payment is saved

First and Final payments are not available for Scheduled Checks.

To Enter Payment for a Claim

You can enter a payment for a claim directly from the claim window.

1. Search for the claim associated with the payment you want to void.
2. From the left navigation tree, under the required claim node select the Financials link.
   The Reserves window opens.

3. Select the Add Payment button.
   The Funds Management window opens.

4. Select and complete the fields on the Transaction tab , as shown below.

   Control Number — Enter a unique ID for a payment. If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.

   Payment — Select the check box to create payment transaction.

   Collection — Select the check box to create collection transaction.

   Void — Select the check box to void the current transaction and set all values to 0.

   Cleared — Select the check box to mark the current transaction check as cleared.

Claim Number	Enter the claim number for the claim associated with this payment, or select the ••• button to search for the claim number.

If you open the Funds Management window from a Claim window, RISKMASTER automatically displays the claim number.

Final Payment	Select the check box to mark all the reserves on the claim to a closed status.

The Final Payment check box is visible only if the Payment check box is checked. After the check is printed, the Final Payment check box is disabled.

Detailed Tracking Claimant	**Displays the name of the** claimant.

Note**: The Detailed Tracking Claimant field is visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant is selected by default on the "Financials/Reserves" grid, but you can change it, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you cannot change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit the Detailed Tracking Claimant. While editing the payment, you cannot change the Detailed Tracking Claimant because changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.

Transaction Date	Enter the date of the payment or select the 📅 button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payee Type	From the drop down list, select the code that best describes the person to whom you are sending the check.

If you select Claimant, RISKMASTER automatically enters the claimant information on the tab.

Note: This field displays when you select the Payment check box.

Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction

The available options in the field are 'attorney for' and 'as guardian of'.

The first payee will not have a Payee List Phrase.

Note: This field is enabled only when there are multiple payees for the transaction.

Last Name	Enter the payee's last name or select the ••• button to open the Standard Entity Search window and search for a payee.

If you search for a payee, RISKMASTER automatically enters the payee information on the tab.

First Name	Enter the payee's first name.

Payees	Select the button open the code selection window and select payees for the selected payment
	Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Tax ID	Enter the payee's tax identification number.
Address	Enter the payee's mailing address. Enter the City, State, and Zip in the appropriate fields.
	If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payee's record in the database .
Enclosure	Select the check box if you want to include other documents with the check. Selecting this option prints "Enc" on the check.
Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
Auto Check?	Select the check box if you want checks to be automatically issued for this payment.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
	Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
EFT Payment	This check box is selected if the payment needs to be made through electronic funds transfer.
Type of Bill	Enter the type of bill for which medical payments are generated for bill review fees or select the button to select from the Code Selection window.
	The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.
Check Date	Enter the date that will print on the check or select the button to select from a calendar.
Check Status	Enter the code that best describes the status of the check or select the button to select from the Code Selection window. If you select Hold the payment will not print.

Check Memo   Enter text you want to print on the check.

Check Number   Enter the check number that will print on the check.

Transaction Notes
Select the button to open the RISKMASTER Editor and enter additional notes about the transaction.

Currency Type
Enter the currency type or select the search button to select from the Code Selection window.

By default the Claim currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

Void Check Reason
Select the button to open the RISKMASTER Editor and enter the reason for voiding the transaction.

The field will be visible only when on the Payment Parameter Setup window: Check Options tab, the Check Void Reason check box is selected.

Select the button to open the Print Single Check window, complete the fields and select the Print button to print a single check for the payment.

Select the button to open the Payee Experience window and view the number of payments, total amount of payments, and average amount of each payment made to the payee.

This link is displays, if you have previously made payments to this payee.

Select the button to load the claim.

Note: For the records where funds are searched from the Search menu, the claim is loaded in the MDI tree. From this funds window you can go back to the claim window.

Select the button to go back to Reserves window.

Select the button to go to Payment History window.

Select the button to preview the check for single current transaction.

Note: The Print Preview button appears on the toolbar before the check is printed for a transaction. You can view the check preview of the transaction before check printing. Once the check is printed for a transaction, the Print Preview button no longer displays on the toolbar.

Select the button to view the clone image of a printed check.

Note: Once the check for a transaction is printed, this Clone Printed Check button appears on the toolbar. You can view the check image even after the check is printed. The view contains all the checks in case the transaction is part of a rolled up check.

Select the button to open the Enhanced Notes for the associated parent claim record.

5. To add transaction details,On the Transaction Details tab, select the button.
    The Funds Split Detail window opens.

6. Complete the fields on the Funds Split Detail window , as shown below .

Currency Type	Displays the type of currency.
	Note: If the payment is not associated with a claim the currency type will default to Base Currency.
First And Final Payment	The First And Final Payment check box is checked automatically and read only. This option lets you create a First And Final Payment, which means you can make a payment without setting a reserve beforehand. When you create the payment, the reserve is created on the fly. This option is available only when General System Parameters->Use carrier Claim setting is ON
	Note: When you open the Funds Split Details window from the claim navigation tree without selecting a reserve from the financial/reserve grid, the 'First & Final Payment' check box is selected automatically and is read only. If you do not want this check box to be selected, either you can first select the reserve from financial/reserves grid on Claim navigation tree and then navigate to Funds window by selecting "Add New Payment" button on the toolbar or open the Funds window (Funds menu > transaction) and search for a claim, and then uncheck the 'first & Final Payment' check box.
Policy	From the Policy drop down list, select the name of policy.
	Note: The Policy field is only visible when **the Use Carrier Claim Settings check box is** selected in Utilities.
Unit	From the Unit drop down list, select the generic unit.
	Note: The Unit field is only visible when **the Use Carrier Claim Settings check box is** selected.
Coverage	Enter the type of coverage for the reserve account or select the button to select from the Code Selection window.
	Note: The Coverage field is only visible when **the Use Carrier Claim Settings check box is** selected.
Transaction Type	Enter the reserve account to which you want to apply the transaction, or select the button to select from the Code Selection window.
Reserve Type	Displays the reserve type for the reserve account.
	Note: This field is read-only by default. To be able to modify the reserve type in this field, in RISKMASTER Utilities, on the General System Parameter Setup window, select the Use Res Type to Filter Trans Type check box.

Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
	Note: The Reserve Balance is shown as zero for first and final payment. For payments other than first and final payment, the Reserve Balance is the actual reserve balance for the selected reserve.
Reserve Balance (Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.
	Note: The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.
Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the [🔍] button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the [📅] button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and display the information in the Transaction Detail frame on the Funds Management window.
Cancel	Select to close the window without saving the information you entered.

7. Select OK.

The Transaction Detail frame on the Funds Management window displays the details of the payment.

[Tips]

To Edit Payment Data

1. Search for the claim associated with the payment you want to void.

2. From the left navigation tree, under the required claim node select the Financials link.
    The Reserves window opens.

3. Select the Add Payment button.
    The Funds Management- Payments window opens.

4. In the Control Number field, enter the control number for the payment you want to change and then press Enter.
    RISKMASTER updates the other fields on the Funds Management window.

5. Select the Transaction Detail tab.
6. Select the transaction you want to edit.
7. Select Edit.
    The Payment Detail Entry window opens.

8. Edit the information in the fields.
9. Select OK.
    The Funds Management window opens.

10. From the toolbar, select the Save button .

Collections Overview

You can use RISKMASTER to track collections. You can enter collections while processing claim or claimant information, or you can first enter collections and then associate them with claims . You can also enter a collection without setting up reserves for claims.

To enter a collection for a claim, use the Add Collection button on the Reserves window.

To Enter Collection Data

1. Search for the claim you want to add a collection for.
2. On the Claim window, select the Financials button.
    The Reserves window opens.

3. Select the Add Collection button.
    The Funds window opens and a Funds node displays in the left navigation tree.

4. Select and complete the fields on the Transaction tab, as shown below .

Control Number	Enter a unique ID for a payment . If you do not enter a control number into this field, RISKMASTER automatically assigns a control number when you save the payment.
Payment	Select the check box to create payment transaction.
Collection	Select the check box to create collection transaction.

Claim Number	Enter the claim number for the claim associated with this payment, or select the search button to search for the claim number. If you open this window from a Claim window, RISKMASTER automatically displays the claim number.
Void	Select the check box to void the current transaction and set all values to 0.
Cleared	Select the check box to mark the current transaction check as cleared.
Transaction Date	Enter the date of the payment or select the button to select from a calendar.
Bank Account	From the drop down list select the bank account from which you will make this payment.
Payor Type	From the drop down list, select the code that best describes the person receiving the check.
Last Name	Enter the payor's last name or select the search button to search for a payor. If you search for a payor, RISKMASTER automatically enters the payor information on the tab.
OFAC Check	Select to open the Specially Designated Nationals List Check window and view if the payor is listed in the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List.
Payees	Select the button open the code selection window and select payees for the selected payment Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
First Name	Enter payor's first name.
Pay To The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.
Tax ID	Enter payor's tax identification number.
Address	Enter payor's mailing address, enter the City, State, and Zip in the appropriate fields. If RISKMASTER automatically enters the address and you want to change the address, making a change here will not update the payor's record in the database .
Enclosure	Select the check box if you want to include other documents with the check. When you select the check box, "Enc" prints on the check.
Auto Check?	Select the check box if you want bills to be automatically issued for this collection.

Include Claimant in payee	Select the check box to make the payment to the claimant along with any other payor you selected. Note: Payee name along with claimant name separated by the separator 'and' appears under the Payee column on the Payment History window. In case of multiple claimants, primary claimant name is displayed.
Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
Dormancy Status	Displays the dormancy status of the unclaimed or escheat payment.
EFT Payment	This check box is selected if the payment needs to be made through electronic funds transfer.
Type of Bill	Enter the type of bill for which medical payments are generated for bill review fees or select the 🔍 button to select from the Code Selection window. The field is visible only when the Enable Bill Review Fee check box is selected on the General System Parameter Setup: Funds Settings tab. The medical payments generated for bill review fees will have check status as queued.
Date	Enter the date on which you are adding the collection or select the 📅 button to select from a calendar.
Check Date	Enter the date on which you are adding the collection or select the 📅 button to select from a calendar.
Check Memo	Enter text you want to print on the check.
Deposit Number	Enter the deposit number for the collection.
Transaction Notes	Enter any additional comments or select the 📝 button to open the RISKMASTER Editor and enter additional notes about the transaction.
Void Check Reason	Enter a valid reason for marking the check as void or select the 📝 button to open the RISKMASTER Editor and enter the reason for marking the check as void. The Field will be visible only if Check Void Reason check box is selected in Utilities.
Detailed Tracking Claimant	**Displays the name of the** claimant.

Note**: The Detailed Tracking Claimant field will be visible only when on the General System Parameter Setup window: Carrier Claim Settings tab, the Use Carrier Claim Settings check box is selected. While adding a new payment transaction, the** Detailed Tracking Claimant will by default be selected as selected on "Financials/Reserves" grid, However, you may change it if you want to, provided no Funds Split Detail is added. Once the Funds Split Detail is added, you will not be able to change the Detailed Tracking Claimant. You can still add/edit another combination of policy, coverage and reserve type on the Funds Split Detail window but cannot edit Detailed Tracking Claimant. While editing the payment, user cannot change the Detailed Tracking Claimant as changing the Detailed Tracking Claimant requires all saved transaction details to be deleted.

5. To add transaction details, From the Transaction Details tab,select the Add Transaction button.
The Funds Split Detail window opens.

6. Complete the fields on the Funds Split Detail window , a s shown below .

Transaction Type	Enter the reserve account to which you want to apply the transaction, or select the button to select from the Code Selection window.
Reserve Type	Displays the reserve type for the reserve account.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
Amount	Enter the transaction amount.
GL Account	Enter the general ledger fund from which you want to make this transaction, or select the button to select from the Code Selection window.
From and To	Enter the date range for the service period or select the buttons to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill in response to which you are making the transaction.
Invoiced Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
First And Final Payment	By Default, First & Final Payment check box will always be disabled and unchecked for collections Note: The field is read-only by default. You can create the First And Final Payment without making a reserve. A reserve still need to be created but it will be created when needed while making payments.
Policy	From the Policy drop down list, select the name of policy.

Unit   From the Unit drop down list, select the generic unit.

Coverage   Enter the type of coverage for the reserve account or select the [🔍] button to select from the Code Selection window.

7. Select OK.

    The Transaction Detail tab on the Funds Management window displays the details of the payment .

To Work with Collection Data

To Edit Collection Data

1. Search for the claim you want to edit a collection for.
2. From the left navigation tree, under the required claim node, select the Financials link.

    The Reserves window opens.

3. Select the Payment History button.

    The Payment History window opens.

4. From the list that displays, select the control number link for the transaction that you want to edit.

    The Funds window for the selected collection opens.

5. Select the Collections check box.

6. Edit the information in the fields.

7. From the toolbar, select the Save button [💾] .

8. To edit transaction details, on the Transaction Details tab, select the [✏️] button.

    The Funds Split Details window opens.

9. From the Transaction Type drop down list, select the reason for the collection.
10. In the Amount field, enter the dollar amount of the collection.
11. Complete any other required fields.
12. Select OK.

    On the Funds Management window the Transaction Detail frame displays the detail of the transaction.

To Delete a Collection

1. Search for the funds transaction for which you want to delete transaction details.

    The Funds window opens.

2. From the Transaction Detail tab, select the link for the collection that you want to delete.

3. Select the [✖️] button .

    RISKMASTER deletes the selected collection.

[Tips]

To Work with Transaction Details

To edit transaction details

1. Search for the funds transaction for which you want to edit transaction details.

   The <u>Funds window</u> opens.

2. On the Transaction Detail tab, from the Transaction Details for Funds Payments section, select the option next to the transaction type that you want to edit.

3. Select the Edit button.

   The Funds Split Details <u>window</u> opens.

4. Edit the information in the fields.

5. Select the OK button.

   On the <u>Funds Management window</u>, the Transaction tab displays the edited information.

To delete a transaction detail

1. Search for the funds transaction for which you want to delete transaction details.

   The <u>Funds window</u> opens.

2. On the Transaction Detail tab, from the Transaction Details for Funds Payments section, select the option next to the transaction type that you want to Delete

3. Select the ✖ button.

   RISKMASTER deletes the selected transaction detail.

[Tips]

To Apply Payments to Coverages

1. From the main menu, select Funds.

   The Funds menu opens and a Funds node displays in the left navigation tree.

2. From the Funds menu, select Apply Payments to Coverages.

   The Apply Payments To Coverages window opens and displays the claims to which payments are attached.

3. To enter the date range to display in the claim, from the From Date and To Date fields, select the check box and enter the claim date range.

4. To display the claims within the date range you selected, select the Refresh List button.

5. To attach the payments to the applicable insurance coverage for the claim , do one of the following:

   - To select all the claims that display, select the Select All button.

   - To de-select all the claims, select the Un-Select All button.

   - To select individual claims, select the check box for each claim.

6. Select Process.

[Tips]

To Release a Payment

1. Search for the claim associated with the payment you want to void.

2. From the left navigation tree, under the required claim node select the Financials link.

   The Reserves window opens.

3. Select the Add Payment button.

   The Funds Management window opens.

4. In the Control Number field, enter the control number for the payment you want to change and then press Enter. RISKMASTER updates the other fields on the Funds Management window

5. From the Check Status field, select the search button to open the Code Selection window.

6. On the Codes Selection window, from the codes list, select R Released.

7. In the Check Date field, enter the date of the check.

8. In the Check Memo field, enter any text you want to print on the check.

9. From the toolbar, select the Save button ![save icon].

    The payment prints when you print the check batch.

Tips

To Void Payments

You can void single payments by completing the following steps.

> Note: After you void a payment , you cannot undo the void status. If you decide that you voided a payment in error, you must create a new payment. You also cannot reuse the check number of a printed check that has been voided.

To void a payment

1. Search for the claim associated with the payment you want to void.

2. From the left navigation tree, under the required claim node select the Financials link.
    The Reserves window opens.

3. Select the Payment History button.
    The Payment History window opens.

4. Select the transaction you want to void.
    The Funds Management window opens.

5. On the Transaction tab select the Void check box.
    A window opens and displays a warning message.

6. Select OK.
    On the Funds Management window, next to the Void field, Yes displays.

To View Custom Payment Notification

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, select the Custom Payment Notification.
    A Custom Payment Notification window opens and displays a list of checks that you need to print. A Custom Payment Notification node displays in the left navigation tree

Note: (Number) displays the actual number of total checks that you need to print.

3. Do one of the following:

    *   To view payments due by the end of the current week, select the Show Payments Due By option and then select the End of Week option.

    *   To view payments due by the end of the current month, select the Show Payments Due By option and then select the End of Month option.

- To view pending payments for a period, select the Show Payments in Due Range option, and enter the date range in the From and To fields.

4. Select Refresh.

    The table displays the check details based on the time period that you select.

5. To print the details that display, select Print.

Tips

To Approve Funds Transactions

1. From the main menu, select Funds.

    The Funds menu opens and a Funds node displays in the left navigation tree.

2. From the Funds menu, select Approve Funds Transactions.

    The Approve Transactions window opens.

3. From the Search Funds Transaction Details frame, search for the funds transaction.

    The Payments tab displays all on hold payments that matches the search criteria and the Collection from LSS tab displays all Legal Solution Suite (LSS) collections that are on hold.

4. From the Supervisor Approval Of Funds Transactions section, select the check box(s) against the funds transactions.

5. Do one of the following:

    - To approve the payment processing or check printing for the selected transaction, select the Approve button.

    - To reject the funds transaction for the reserve for the selected transaction, select the Deny button.

    - To void a selected payment without readjusting the reserve, select the Void button. In the Void Check Reason field, enter the reason for voiding the payment.

6. In the Void Check Reason field, enter a valid reason for marking the check as void.

    Note: The field will be visible only when on the Payment Parameter Setup window: Check Options tab, the Check Void Reason check box is selected.

7. Select the Print Report button.

    RISKMASTER prints a report of the denied, approved and voided funds transactions.

Bank Accounts

Bank Accounts Overview

In RISKMASTER , you can use bank accounts to keep track of funds associated with claims and to automatically schedule checks.

After you set up your bank account information in RISKMASTER, you can configure the display of information on the checks. You must set up check stock for each bank account against which you will enter checks. For example, you can have several checking account s or escrow account s that you use to issue payments. Each requires a separate account record and check

To Set Up a Bank Account

You can define a bank account after you record Account Type codes.

1. From the main menu, select Funds.

   The Funds menu opens.

2. From the Funds menu, select Bank Accounts.

   The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. Select and complete the fields on the Bank Accounts window: General Information tab , as shown below.

Bank Name	Enter the name of the bank where you want to set up an account or select the ··· button to open the Search window and search for an existing bank.
Address	Enter the bank's address. Enter the City, State, and Zip, in the appropriate fields.
Account #	Enter the bank account number.
Account Name	Enter a unique identifying name you assign to the bank account.
Account Type	Enter the account type or select the search button to select from the Code Selection window.
Next Check #	Enter the check number to print on the next check from this account.
Priority	From the drop down list, select the priority of the check.

4. Select and complete the fields on the Bank Accounts window: Account Owner tab , as shown below .

3.

Owner	Select the button to open the Org Hierarchy window and select the department responsible for maintaining this bank account.
Line of Business	Select the claim type (General Claim, Vehicle Accident, Workers' Compensation, Non-Occupational claims)for which you will use this bank account.
	Select All, if you want to use this bank account for all types of claims.
Effective Trigger and Dates	

Effective Date Trigger	RISKMASTER uses the trigger date you select, to determine whether you can use the bank account for a particular claim.
	For example, if you select Event Date, then RISKMASTER uses the bank account for a claim only if the Event Date falls within the Effective Date Range you specify.
	From the drop down list,

- Select **Current System Date**, if you want to use today's date (as it displays on your computer) as the date trigger.

- Select **Event Date**, if you want to use the Event Date as the date trigger.

- Select **Claim Date**, if you want to use the Claim Date as the date trigger.

Effective Start Date	Select the start date from which RISKMASTER can use this bank account to make a payment for the claim.
Effective End Date	Select the end date till which RISKMASTER can use this bank account to make a payment for the claim.
Service Codes	Enter the industry standard code for identifying balances and service charges that display on bank account analysis statements, or select the 🔍 to select from the Code Selection window.

4.

5. From the toolbar, select the Save button 💾 .

Note: **Search for information in existing records, before you enter new data . This prevents duplicate entries in the database .**

Tips

To Record Bank Deposits

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Bank Accounts link.
   The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button 🔍 .
   The Lookup Results window opens.

4. Select the bank account you want to record a deposit in.

5. From the Bank Accounts window, select the Deposit button.
   The Bank Account Deposit window opens.

6. Complete the fields on the Bank Account Deposit window .

   Control Number   Enter the internal tracking number for the deposit.

Cleared	Select the check box to indicate that the check appeared on the bank statement.
Void	Select the check box to remove the deposit from the account and retain a record of it.
Transaction Type	From the drop down list, select the transaction type.
On	Enter the date on which you cleared or voided the deposit.
Clear Multiple Deposits	Select the button to open the Select Deposits to Clear window. Select the check box for the deposits you want to delete and select OK.
Bank Account	From the drop down list, select the account that you want to debit.
Transaction Date	Enter the date on which you made the deposit, or select the button to select from a calendar.
Amount	Enter the dollar amount of the deposit.
Description	Select the button to open the RISKMASTER Editor and enter a short description of the deposit.
Adjustment Type	If you are changing a deposit amount, select the search button to select from the Code Selection window and select the reason for making an adjustment to the deposit.
Back to Bank Account	Select to open the Bank Accounts window .

7. In the Control Number field, enter the internal tracking number for the deposit.
8. From the Transaction Type drop down list, select Deposit.
9. From Bank Account drop down list, select the account that you want to debit.
10. From the Transaction Date drop down list, enter the date on which you made the deposit.
11. In the Amount field, enter the amount of the deposit.
12. Select the button adjacent to the Description field, to open the RISKMASTER Editor and enter a short description of the deposit.
13. From the Adjustment Type field, select the button to open the Code Selection window and select the reason for making an adjustment to the deposit.
14. Do one of the following:
    - To indicate that the check or deposit appeared on the bank statement, select the Cleared check box.
    - To remove the deposit from the account and retain a record of it, select the Void check box.
15. In the On field, enter the date on which you cleared or voided the deposit.
16. From the toolbar, select the Save button .

Tips

To Clear or Void Bank Deposits

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, choose Bank Accounts.
    The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button [image] .
    The Lookup Results window opens.

4. Select the bank account you want to clear or void.
5. From the Bank Accounts window, select the Deposit button.
    The Bank Account Deposit window opens.

6. In the Control Number field, enter the internal tracking number for the deposit.
7. From the Transaction Type drop down list, select Deposit.
8. In the Transaction Date field, enter the date on which you made the deposit.
9. Complete the other fields, as required.
10. Do one of the following:

    - To void a deposit, select the Void check box.

    - To clear a deposit, select the Cleared check box.

11. In the On field, enter the date on which you cleared or voided the deposit.

12. From the toolbar, select the Save button [image] .

Tips

To Reconcile a Bank Account

Bank Account reconciliation helps you balance your bank accounts with your RISKMASTER data by processing the data from the bank's electronic statement.

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, select Bank Accounts.
    The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button [image] .
    The Lookup Results window opens.

4. Select the bank account you want to reconcile.
5. From the Bank Accounts window, select the Balance button.
    The Bank Account Reconciliation window opens.

6. In the Statement Begin Date field, enter the date from which you want the Bank Statement to begin.
7. In the Statement End Date field, enter the date on which you want the Bank Statement to end.
8. In the Statement Balance field, enter the final balance listed on the bank account.

9. From the Select File to Process field, select the Browse button.

   A Choose file window opens.

10. From the file browser, select the file that the bank provides with your banking record for this period.

Note: The file displays in the following format:

Field name	Position	Length	Type
Account Number	1-19 1-20 if you select the Account Number check box	19 20 if you select the Account Number check box	Alphanumeric
Check Number	20-29 21-30 if you select the Account Number check box	10	Alphanumeric
Filler	30 Not needed if you select the Account Number check box	1 0 if you select the Account Number check box	Alphanumeric
Check Amount	31-42	12	Alphanumeric
Cleared Date	43-48	6	Alphanumeric

11. Select the Account Number Length check box, if the bank account number is 20 digits long.
12. Select the Process File button.
13. Select the Save & Close button.

    RISKMASTER saves the bank statement. You can access the bank statement from the Account Balance tab.

Tips

To Create Bank Account Management Reports

If you have the permission to enter data for Sub Bank Accounts, you can create two types of reports for a bank account.

- The Master Account Balance Report displays an overall account balance including all sub accounts.

- The Monthly Bank Reconciliation Report displays whether your bank account is in balance.

To Create a Bank Account Management Report

1. From the main menu, select Funds.

   The Funds menu opens.

2. From the Funds menu, select the Bank Accounts.

   The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button.

   The Lookup Results window opens.

4. Select the bank account you want to create a report for.
5. From the Bank Accounts window, select the Reports button.

The Reports window opens.

Note: The Reports button displays only if Assign Check Stock to Sub Account check box is selected in Utilities.

6.   Select the report that you want to create.
7.   Select Print.
     The Print Preview window opens.

8.   To review the report, use the navigation buttons.
9.   Select Print.
     The report prints to the printer set up in the Print Setup window.

Tips

To View Account Balance Information

You can view a details of the balance in your bank account, for a statement period, after you   reconcile your bank account.

1.   From the main menu, select Funds.
     The Funds menu opens.

2.   From the Funds menu, choose Bank Accounts.
     The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3.   From the toolbar, select the Lookup button.
     The Lookup Results window opens.

4.   Select the bank account for which you want to view account balance information.
5.   From the Bank Accounts window opens, select the Account Balance button.
     The Account Balance Information window opens.

6.   To view the account balance information for a certain period, from the Statement Dates field, select the button to select from a list of prior statement periods.
7.   The fields on the Account Balance Information window display the information for the selected statement period , as shown below .

Balance Per Bank Statement	Displays the balance in the ban account for the statement period you select.
Statement Dates	Displays the date range for which you want to view the balance information.
Deposits in Transit	Displays the amount that is due for credit to the bank account.
# of Deposits	Displays the number of deposits made to the bank account.
Outstanding Checks	Displays the number of checks that are outstanding for payment from the bank account.

# of Checks	Displays the number of checks for which payment was made from the bank account.
Sub Total	Displays the sub total of the balance amount in the bank account.
(Reconciliation Total) Deposits	Displays the total amount of deposits to the bank account based on your bank account reconciliation.
	Reconciliation is to balance your bank accounts with your RISKMASTER data by processing the data from the bank's electronic statement.
Balance Per Books (System)	Displays the balance in your bank account based on bank's electronic records.
(Reconciliation Total) Checks	Displays the total amount of checks paid from the bank account based on your bank account reconciliation.
Out Of Balance	Displays the difference in the balance amount based on the records in your RISKMASTER system and your bank's electronic records.
(Reconciliation Total) Adjustments	Displays the total adjustment made to your bank account based on your bank account reconciliation.

8. Select Close.

To Set Up Check Stock

 Before you can configure the way your checks look and the information on them, you must set up your bank accounts. You can set up checks for each bank account against which you will enter checks. For example, if you have several **checking account**s or **escrow account**s from which you issue payments, for each account you will require a separate account record and **check stock** .

You can also set up multiple check stocks for one bank account.

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Bank Accounts.
   The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button .
   The Lookup Results window opens.

4. Select the bank account for which you want to create a check stock.
5. From the Bank Accounts window, select the Check Stocks button.
6. Select the Check Stocks button.
   The Check Stocks window opens.

7. Complete the fields on the
   - Basic Options tab

- [Check Image tab](#)

- [Alignment Options tab](#)

- [Advanced Options tab](#)

8. From the toolbar, select the Save button ⬜ .
9. Select the Print Sample button.
10. Select the Clone button to open the Clone Check Stock window to clone the check stock.

Note: You can create a copy of the current check stock settings for any existing Bank Account. You can select the current bank account or choose a different bank account from the list.

11. Select the Back to Bank Accounts button.
12. Save and close the Bank Accounts window.

Guidelines for Entering the MICR Number on Checks

Magnetic Ink Character Recognition (MICR) was developed to utilize the benefits of computer technology in the banking industry. Using MICR numbers enables automatic check sorting.

MICR font set has a total of 14 characters, ten specially designed numbers (0 through 9) and four special symbols (Transit, Amount, On-Us, and Dash).

Typed Character	Meaning	MICR Character
;	Transit Number	
>	Amount	
:	On Us	
=	Dash	
d	Check Number	0-9

Checks

Checks Overview

Use RISKMASTER to set up and print checks for claim payments. You can also schedule automatic checks for future payments.

Each time you process checks, claim and policy data is updated to reflect currently applied payment amount.

To Set Up Automatic Checks

You can set up an automatic check. You can then enter payment details and add third party payees, if any.

- [To Set up Automatic Checks](#)

- [To Enter Detailed Check Information](#)

- [To Enter Third Party Payments](#)

To Set up Automatic Checks

You must associate the payment with a claim number, a bank account, a payee type and the payee.

1. From the main menu, choose Funds.
   The Funds menu opens.

2. From the Funds menu, select Automatic Checks.
   The [Schedule Automatic Check Processing window](#) opens and an Automatic Checks link displays under the Funds node in the left navigation tree.

3. Select and complete the [Scheduled Checks tab](#) , as shown below .

 | | |
   |---|---|
   | **Claim Number** | Enter the claim number you want to associate with the payment or select the ▀▀▀ button to search for a claim. |
   | **Claimant** | Displays the claimant associated with the selected claim. |
   | | If there are multiple claimants, select the ▀▀▀ button and select a claimant from the list of claimants. |
   | **Unit** | Displays the vehicle unit associated with the selected vehicle accident claim. |
   | | If there are multiple units, select the ▀▀▀ button and select a unit from the list of units for a Vehicle Accident claim. |
   | **Control Number** | Enter the number your organization uses to track this data. |
   | **Bank Account** | From the drop down list, select a bank account owned by the department responsible for this claim. RISKMASTER uses this bank account to pay the checks you are setting up. |
   | | If no bank accounts are available, set up the bank account for the department before scheduling automatic checks. |
   | **Payee Type** | From the drop down list, select the code that best describes the person receiving the check. |
   | | If you select C-Claimant as the Payee Type, RISKMASTER automatically enters the payee information on this tab. |
   | **Last Name** | If you did not select C- Claimant in the Payee Type field, select the ▀▀▀ button to search for a payee. |

First Name	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's first name.
Middle Name	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's middle name.
Tax ID	When you select a payee in the Last Name field, RISKMASTER automatically enters the payee's tax identification number.
Address	When you select a payee in the Last Name field, RISKMASTER automatically enters the address, city, state and zip details.
	You can enter a different Address also, as changes you make to the address here, do not affect the address record in the database.
Check Memo	Enter the text that you want print on the check.
Pay Interval	Enter the pay interval period or select the [🔍] button to select from the Code Selection window.
# of Payments	Enter the number of automatic checks you want to issue for this payment.
First Payment	Enter the date on which you want the first check to be issued or select the [📅] button to select from the calendar.
Final Payment	Displays the last check date based on the # of Payments and the First Payment date you entered.
Freeze Payment Batch	Select the check box if you want to freeze payments for the check batch.
Enclosure	Select the check box if you will include other documents with the check.
	When you select the check box, "Enc" prints on the check.
Payees	Select the button open the code selection window and select payees for the selected payment
	Note: You can also select multiple payees in this field up to the maximum number of payees specified on the Payment Parameter Setup window: Check options tab.
Payee Phrase	From the drop down list select the phrase which you want to display on the Pay to the Order Of field on the funds transaction
	The available options in the field are and, 'attorney for' and 'as guardian of'.
	The first payee will not have a Payee List Phrase.
	Note: This field is enabled only when there are multiple payees for the transaction.
Pay TO The Order Of	Displays the name of the payee to whom the check is issued. The name that displays here along with the payee phrase is printed on the check.

Combined Payment?	This check box is selected if the payment is a combined payment and is to be paid to a set of payees.
EFT Payment	The check box is selected if the payment is to be made through electronic funds transfer.
Include Claimant in Payee	Select the check box to make the payment to the claimant along with any other payee you selected.
Gross Amount	Displays the total dollar amount the payee you entered on this tab will receive. If you entered third party payees, the gross amount is the total of all checks less the total amount that third party payees will receive.
Net Amount	Displays the total dollar amount of the entire payment including a total of all checks for all payees.
# of Third Parties	Displays the number of third parties you added to the payment on the Third Party Payees tab .
Third Party Total	Displays the total dollar amount you will pay to third parties.
# of Checks Printed	Displays the total number of checks that will be printed as part of this payment. This includes all scheduled checks for the payee and for all third party payees.
Printed Amount	Displays the amount that will print on the check.
Total # of Checks	Displays the total number of scheduled checks that will be printed as part of this payment. This includes checks for the payee and for third party payees.
Payment Grand Total	Displays the total dollar amount the payee will receive.
Adjust Print Date Using Schedule Dates	**The check box selected by default** adjusts the Print Date using the Scheduled Dates. Note: The Adjust Print Date Using Schedule Dates check box is visible, when the Use For Automatic Checks check box on the Payment Parameters Setup window: Schedule Date tab is selected. By selecting the check box user have the option to omit the current batch from having the print date adjusted using Schedule Dates.
Currency Type	Enter the currency type or select the search button 🔍 to select from the Code Selection window.

> By default the Claim Currency will display in the Currency Type field. If the payment is not associated with a claim the currency type will default to Base Currency.

4. From the toolbar, select the Save button 💾 .

5. From the toolbar, select the Enhanced Notes 📝 button to open the Enhanced Notes for the associated parent claim record.

   Note: The Enhanced Notes button is only visible when a claim number is entered.

To Enter Detailed Check Information

After you create an automatic check, you enter the payment amount, the reserve accounts debited, as well as other transaction details.

1. From the Schedule Automatic Check Processing window, select the Detailed Information tab.
2. Review the payments that display in the Payment Information frame.
3. To schedule another payment at the pay interval you selected on the Scheduled Checks tab, select the Add button.

   The payment displays on the Payment Information tab.

4. To add additional payments, from the Transaction Details for Future Payments table, select the New button

   .

   The Payment Detail Entry window opens.

5. Complete the fields on the Payment Detail Entry window , as shown below .

Currency Type	Displays the type of currency.
Transaction Type	Enter the reserve account to which you want to apply the payment, or select the button to select from the Code Selection window.
Amount	Enter the payment amount. If you want to calculate the payment amount select the calculator button to open the calculator. To enter the amount from the calculator select the = button on the calculator.
Reserve Type	Based on the transaction type you selected, RISKMASTER displays the reserve type.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the Transaction Type field.
Reserve Balance(Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.

   The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

GL Account	Enter the general ledger fund from which you want to make this payment, or select the button to select from the Code Selection window.
From and To	Enter the date range for the period of service or select the button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.

6. Select the OK button.

   The payment displays in the Transaction Details for Future Payments table on the Detailed Information tab.

To enter third party payees

If you want to pay part of an automatic payment to someone other than the person you set up in the Scheduled Checks tab, you can enter this information in the Third Party Payee tab.

Note: You must complete the Scheduled Checks tab and the Detailed Information tab before you complete the Third Party Payees tab.

1. From the Schedule Automatic Check Processing window, select the Third Party Payees tab.

2. From the Third Party Payments table, select the New button .
   The Third Party Payment Detail Entry window opens.

3. Complete the fields on the Third Party Payment Detail Entry window , as shown below .

   Payee Details

Last Name	Enter the payee last name, or select the button to open the Standard Entity Search window and select an entity.
First Name	Displays the payee entity's first name.
Middle Name	Displays the payee entity's middle name.
Tax ID	Displays the payee entity's Tax ID.
Address	Displays the payee entity's address.
City, State, Zip	Displays the payee entity's city, state and zip code.
Check Memo	Enter the text you want to display on the check.
Deduct Against Payee	Select the check box if you want to deduct the payment amount from the primary payee's payment and create a second check for the payment.
Third Party Payee Enclosure	Select the check box if you want to include other documents with the check. When you select the check box, "Enc" prints on the check.

   Transaction

Currency Type	...ys the type of currency.
Transaction Type	Enter the reserve account to which you want to apply the payment, or select the button to select from the Code Selection window.
Amount	Enter the payment amount.
Percent	Enter the percent of the reserve balance that you want to pay to the third party payee.

Enable Amount/Payment	Select to enable the Amount or Percent field, to enter a value. The corresponding field automatically displays a calculated value. For example, select Enable Percent to enter a percent value. The Amount field displays the calculated payment amount.
Reserve Type	Based on the transaction type you selected, RISKMASTER displays the reserve type.
Reserve Balance	Displays the balance remaining in the reserve account you selected in the transaction type field.
Reserve Balance(Claim Currency)	Displays the balance remaining in the reserve account you selected in the transaction type field.
	The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.
GL Account	Enter the general ledger fund from which you want to make this payment, or select the button to select from the Code Selection window.
From and To	Enter the date range for the period of service or select the button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.
Invoiced By	Enter the name of the payee who sent you the bill.
Invoice Number	Enter the invoice number or any other identifying number that displays on the bill.
Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and close this window.
Cancel	Select to close the window without saving the information you entered.

4. Select the OK button.

To Print Checks

To print checks, first complete the precheck register to preview the checks, then print the check batch, and then complete the postcheck register to print a report of the printed checks.

> Note: If you selected the option to roll up checks in Utilities , RISKMASTER will add up all checks to the same payee and print one check for the total amount made out to the single payee. If you void one of the checks from the rolled up checks, RISKMASTER voids all the checks in the roll-up.

To Complete the Precheck Register

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select Print Checks.

   The Print Checks window opens and a Print Check link displays under the Funds node in the left navigation tree.

3. Select the Precheck Register tab.

4. From the Bank Account drop down list, select a bank account.

5. From the Order Field drop down list, select the criteria to sort the checks before printing.

Note: If you do not enter an order, RISKMASTER uses the default order for sorting.

6. Select the From Date check box.

7. In the From Date field, enter the date from which you want to print checks.

Note: If you do not select the From Date check box, the Precheck Register includes the earliest released payment in the check database .

8. Select the To Date check box.

9. In the To Date field, enter the last date for which you want to print checks.

10. In the Org. Hierarchy field, select the ••• button to open the Organization Hierarchy window and select a organizational hierarchy level based on which checks will be filtered.

11. From the Org Hierarchy Level (For Display Only) list, select the Organizational Hierarchy level you want to display on the precheck register.

12. To print checks do one of the following:

    - To print all checks, select the All Checks option.

    - To select checks to print, select the Select Checks option. Then select Choose to select checks from the Select Checks to Print window.

13. Select the Include Auto Payments? check box to print automatic payments.

14. To review the checks list that will print, select Preview.

15. Close the Print Preview window.

16. Select Print.

To Print a Check Batch

1. On the Print Checks window, select the Print Check Batch tab.

2. Select Print.

3. RISKMASTER prints the batch of checks and the Check Printing Completed Successfully? window opens.

4. If the checks print correctly, select Yes.

5. If the checks did not print correctly,

    - Select No.

    - In the Which Checks Failed to Print window, enter the first check that failed.

    - Select OK.

    - Select Close on the Print Checks window and correct the problem.

    - Restart the process of printing checks.

    - Manually destroy all duplicate checks

To Print the Post Check Register

1. On the Print Checks window, select the Postcheck Register tab.

2. In the Check Batch field, enter a batch number.

3. Select the Postcheck Register Type you want to print.

    - To print all information about the checks, select the Detail option.

    - To print only the check number and amount, select the Summary option.

- To display sub account information for the checks you printed, select the Sub Account option.

4. Select Print.

To Print a Single Check

1. Search for the payment for which you want to print a check.
   The Funds window opens for the payment that you select.

2. Select the Print Check button.
   The Print Check window opens and displays the account and check details associated with the payment , as shown below .

From Account	Displays the bank account number, from which you want to make the payment.
Check Stock	Displays the check stock. From the drop down list, you can select a different check stock.
Check Number	Displays the check number. You can enter a different check number.
Check Date	Displays the date of check issue. You can enter a different check date or select from the calendar.

3. To change the check details, edit the information in the fields.
4. Select the Print button.

To Set Up Check Stock

 Before you can configure the way your checks look and the information on them, you must set up your bank accounts. You can set up checks for each bank account against which you will enter checks. For example, if you have several **checking account**s or **escrow account**s from which you issue payments, for each account you will require a separate account record and **check stock** .

You can also set up multiple check stocks for one bank account.

1. From the main menu, select Funds.
   The Funds menu opens.

2. From the Funds menu, select the Bank Accounts.
   The Bank Accounts window opens and a Bank Account link displays under the Funds node in the left navigation tree.

3. From the toolbar, select the Lookup button .
   The Lookup Results window opens.

4. Select the bank account for which you want to create a check stock.
5. From the Bank Accounts window, select the Check Stocks button.
6. Select the Check Stocks button.
   The Check Stocks window opens.

7. Complete the fields on the

- Basic Options tab

- Check Image tab

- Alignment Options tab

- Advanced Options tab

8. From the toolbar, select the Save button .

9. Select the Print Sample button.

10. Select the Clone button to open the Clone Check Stock window to clone the check stock.

Note: You can create a copy of the current check stock settings for any existing Bank Account. You can select the current bank account or choose a different bank account from the list.

11. Select the Back to Bank Accounts button.

12. Save and close the Bank Accounts window.

Guidelines for Entering the MICR Number on Checks

Magnetic Ink Character Recognition (MICR) was developed to utilize the benefits of computer technology in the banking industry. Using MICR numbers enables automatic check sorting.

MICR font set has a total of 14 characters, ten specially designed numbers (0 through 9) and four special symbols (Transit, Amount, On-Us, and Dash).

Typed Character	Meaning	MICR Character
;	Transit Number	⑆
>	Amount	⑈
:	On Us	⑈
=	Dash	⑇
d	Check Number	0-9

To Clear Checks

You can clear the checks issued against a payment, to reconcile your bank statement.

1. From the main menu, choose Funds.
   The Funds menu opens.

2. From the Funds menu, choose the Mark Checks Cleared.

The Mark Checks Cleared window opens and a Mark Checks as Cleared link displays under the Funds node in the left navigation tree.

3. On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to clear were issued.

4. Select the Checks Not Attached to Claims check box, to display checks not associated with a claim .

5. From the Filter by Company drop down list, select an organization, if you want to view only the checks associated with the selected organization.
6. Select Refresh to see an updated list of checks based on your check searching criteria.
    The Select Checks to Clear frame, displays all the checks that meet your search criteria.

7. Do one of the following:

    *   To select all checks to mark as cleared, select the Select All button.

    *   To remove the selection of all checks, select the Deselect All button.

    *   To select individual checks to mark as cleared, select the check box, next to the Transaction number.

Tips

To Void Printed Checks

You can void printed checks. The voided transactions remain in the RISKMASTER database for auditing purposes. After you void a transaction, you cannot undo the void status. If you decide that you voided the transaction in error, you must create a new transaction. You cannot reuse the check number of a printed check that you have voided.

> Note: If you void a check from a set of rolled up checks, all the checks in that set of rolled up checks are automatically voided .If a funds transaction is part of a rolled up check then all the funds transactions are voided and re-issued, void and reissue all the funds transactions .A list of all funds transactions that are a part of rolled up checks is displayed.

To void printed checks:

1. From the main menu, select Funds.
    The Funds menu opens.

2. From the Funds menu, select the Void Checks.
    The Void Checks window opens and a Void Checks link displays under the Funds node in the left navigation tree.

3. On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to void were issued.

4. Select the Include Collections check box, to display collection checks in the search results.

5. Select the Checks Not Attached to Claims check box, to display checks not associated with a claim .

6. From the Filter by Company drop down list, select an organization, if you want to view only the checks associated with the selected organization.
7. Select Refresh to see an updated list of checks based on your check searching criteria.
    The Select Checks to Void frame, displays all the checks that meet your search criteria.

8. Do one of the following:

    *   To select all checks to void, select the Select All button.

    *   To remove the selection of all checks, select the Deselect All button.

    *   To select individual checks to void, select the check box, next to the Transaction number.

9.   Select Void Checks.

10. In the Void Check Reason field, enter a valid reason for marking the check as void.

> Note: The Field will be visible only if Check Void Reason check box is selected in Utilities.

To Reset Printed Checks

Use the Reset Printed Check tab to reprint checks that are not legible or the payee name was spelled incorrectly on the check. Instead of offsetting and re-entering the payment, the Reset Printed Check window changes the print check status from printed to release state and then the payment is printed again in the another check batch or allows users to pre-checked again.

> Note: A Voided/Cleared Check, EFT Payments and Bank Accounts are not included in the list of checks that are to be reset from printed to release state. A set of rolled up checks will be marked as release.

To reset printed checks:

1.   From the main menu, select Funds.
     The Funds menu opens.

2.   From the Funds menu, select the Reset Printed Check.
     The Reset Printed Check window opens and a Reset Printed Check link displays under the Funds node in the left navigation tree.

3.   On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to mark as release were issued.

4.   Enter the check batch number for the check batch you want to print. The first batch of checks you mark as eligible to print is numbered 1, as you mark more check batches eligible to print they are incrementally numbered.

5.   From the Filter By Bank Account drop down list, select a bank account, if you want to view only the checks associated with the selected bank account.

6.   Select the Refresh button to see an updated list of checks based on your check searching criteria.

7.   Do one of the following:

     •   To select all checks to reset the print check status to release, select the Select All button.

     •   To remove the selection of all checks, select the Deselect All button.

8.   Select the Mark as Released button to mark the status of check as release.

To Un-Clear Checks

You can change the status of checks marked as cleared back to printed.

To un-clear checks:

1.   From the main menu, select Funds.
     The Funds menu opens.

2.   From the Funds menu, select the Un-Clear Checks.
     The Un-Clear Checks window opens and an Un-Clear Checks link displays under the Funds node in the left navigation tree.

3.   On the Check Searching Criteria frame, in the Check Date From and To fields, enter the date range for the period during which the checks you want to change the state from cleared to printed were issued.

4.   Select the Include Collections check box, to display collection checks in the search results.

5.   Select the Checks Not Attached to Claims check box, to display checks not associated with a claim .

6.   From the Filter by Company drop down list, select an organization, if you want to view only the checks associated with the selected organization.

7. From the Filter By Bank Account drop down list, select a bank account, if you want to view only the checks associated with the selected bank account.

8. Select Refresh to see an updated list of checks based on your check searching criteria.

   The Select Checks to Mark as Un-cleared frame, displays all the checks that meet your search criteria.

9. Do one of the following:

   - To select all checks to marked as un-cleared, select the Select All button.

   - To remove the selection of all checks, select the Deselect All button.

   - To select individual checks to un-clear, select the check box, next to the Transaction number.

10. Select the Mark Un-cleared button to change the status of checks marked as cleared to printed state.

Schedule Check Printing

Schedule Check Printing Overview

You can schedule check batch printing by selecting one or more bank accounts in the same task manager.

You can print checks from multiple bank accounts (one bank account at a time) and append the data into the same check batch file.

- The precheck register data from each additional bank account is appended into the same precheck file.

- The postcheck register data from each additional bank account is appended into the same postcheck file.

- If the check batch prints without error and checks do not print correctly then you can reset the check batch.

- If an error occurs during check printing, then the current check batch is aborted and the error is logged.

- Moreover reserves are updated automatically when checks are printed.

- You can view/print the pre check, post check and check file from job files for successful execution and can view the status of the job or reset the job.

- The credentials used when running Task Manager must have the rights to print all check amounts. User limits are not be validated.

To Setup Print Check Batch Related Parameters

1. On the Print Check Batch Related Parameters frame, select the New ⬜ button.

   The Check Batch Print Settings window opens.

2. Complete the fields on the Check Batch Print Settings window , as shown below .

1.

Bank Account	From the drop down list, select the account from which you want to issue the checks.
Check Stock	From the drop down list select the check stock that you want to use for the checks.
Order Field	Displays the criteria to sort the checks.
Org. Hierarchy	Select the 🔍 button to open the Organization Hierarchy window and select an organizational hierarchy level.

Org. Hierarchy Level(For Display Only)	From the drop down list, select the Organization hierarchy level. RISKMASTER there are 8 levels of hierarchy for each site or department. RISKMASTER names these levels as Client, Company, Operation, Region, Division, Location, Facility, and Department.
Include Auto Payments?	Select the check box to include auto payments in checks. the Include Auto Payments? check box is checked then reserves need to be updated.
Include Combined Payments?	Select the check box to include combined payments in checks.
Postcheck Register Report Type	Select the option to select the report type for the post check register. • Select the Detail option to include details about the checks you printed. • Select the Summary option to display a summary of the details about the checks you printed. • Select Sub Account option to display sub account information for the checks you printed.
	Select to save the check batch printing settings.
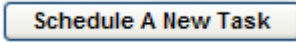
2.

To Schedule a Print Check Batch

1. From the View Scheduled Tasks window, select the **Schedule A New Task** button. The View Scheduled Task window opens.

2. From the Task Type drop down list, select the type of task as Print Check Batch.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as required.
5. Setup the Print Check Batch schedule as per requirement

6. On the Print Check Batch Related Parameters frame, select the New button to open the Check Batch Print Settings window and enter check batch print settings details.

7. Select the Edit button to open the Check Batch Print Settings window in edit mode.

8. Select the Delete button to delete the check batch print settings details.
9. Select the Cancel button to remove all the changes and return to the View Scheduled Tasks window.
10. Select the Save button.

Bill Review System (BRS)

To Calculate a Bill

1. Search for the claim you want to calculate the bill payments for.
2. From the left navigation tree, select the Financials link, under the required claim node. The Reserves window opens.

3. Select the Payment History button. The Payment History window opens and displays a list of payments.

4. Select a link to open the Funds window.

5. From the Funds window, select the BRS Transaction Detail tab.

6. From the BRS Transaction Detail tab, select the [ ] button.
    The Bill Review System window opens.

7. In the From Date and To Date fields enter the date range to generate a bill for.
8. Select Next.
9. From the Table drop down list, select the fee schedule you want to use to calculate the bill amount.
10. Select Next.
    The Bill Review System Setup opens.

11. Complete the fields on the Bill Item Detail tab.
12. Complete the fields on the Calculate tab.
13. Complete the fields on the Bill Item Detail tab , as shown below.

Place of Service

Enter the place where the service was rendered or select the [ ] button to select from the Code Selection window.

FL License #   Enter the physician license number.

Type of Service

Enter the type of service rendered by the physician or select the [ ] button to select from the Code Selection window.

Physician look-up

Enter the physician look up type or select the [ ] button to search for the physician look up type.

Revenue Code   Enter the revenue code.

Ref. No   Enter the reference number of the bill item.

Transaction Type

Enter the transaction type or select the [ ] button to select from the Code Selection window.

Modifier Code(s)

Enter the modifier code or select the [ ] button to select from the Code Selection window.

Modifiers are codes you can use to calculate a specified percentage increase or decrease in the payment for an item.

Diagnosis (Codes)

Enter the diagnosis code or select the [ ] button to select from the Code Selection window.

GL Account   From the drop down list, select the General Ledger account from which you want to make the payments.

CPT   Enter the Physicians' Current Procedural Terminology (CPT) code.

Physician Pharmacy NDC	Enter the physician pharmacy National Drug Code (NDC).
Billing Code	Enter the billing code or select the [icon] button to select from the Code Selection window.
Units Billed	Enter the number of units billed.
Billed Units	Select the option for the billed units measurement, such as Units, Minutes or Others.
Invoiced By	Enter the name of the user creating the invoice .
Invoice Number	Enter an invoice number.
Invoice Date	Enter the invoice date.
Return	Select to open the Bill Review System window: Selected Dates, Zip and Fee Table tab .
Cancel	Select to close the Bill Review System window without saving your changes.

14. Complete the fields on the Calculate tab , as shown below.

Amount Billed	Enter the amount billed for the service rendered or select the [icon] button to select from the Code Selection window.
Calculate Amount Allowed	Select the button to calculate the amount you are allowed to pay for the service rendered.
	RISKMASTER calculates the amount based on the modifier code for the selected billing code.
Amount Allowed	Displays the amount you are allowed to pay for the service rendered.
Amount Saved	Displays any amount that is saved if the amount allowed is less than the amount billed.
Reduce Amount To Pay by Percentage	Enter the percentage by which you want to reduce the Amount Allowed for payment.
Reduce	Select the button to calculate the amount to pay based on the percentage amount that you want to reduce from the amount allowed.
Reduce Amount to Pay By Fixed Amount	Enter the fixed amount by which you want to reduce the Amount Allowed for payment.
	When you enter a percentage and select the Reduce button, this field displays the amount based on the calculations on the amount allowed.

Reduce	Select the button to calculate the amount to pay based on the fixed amount that you want to reduce from the amount allowed.
Amount to Pay	Displays the final amount to pay based on the calculations.
Explanation of Benefit(s)	Enter the code that best describes the Explanation of Benefit(s) that you want to print or select the button to select from the Code Selection window.

15. Select Return.
    The Funds Management window opens with your Transaction detail added.

Time and Expenses

Tips

To Create an Invoice

1. Search for the claim you want to create a reserve for.
   The required claim opens and a Claim node appears in the left navigation tree.
2. From the left navigation tree, select Financials under the required claim node.
   The Reserves window opens.

3. Select the Time and Expense button.
   The Time and Expense window opens.

4. From the Claim Rate Table field, select the *** button.
   A Code Selection window opens and displays the available rate tables.

Note: You have to set up rate tables in Utilities before you can create an invoice .

5. Select a rate table.
   The Claim Rate Table field displays the rate table that you selected.

6. Select the New button.
   The Time and Expense Invoice window opens.

7. Complete the fields on the Time and Expense Invoice window , as shown below.

Claim Number	Displays the claim number for the claim you opened this invoice from.
Allocated	Select the check box if this bill is for services an external vendor provides.
	If the vendor is internal or part of your organization, you do not select the check box.
Vendor	Select the *** button to open the Search Entity Search window and then search for the vendor providing the service.
Invoice Number	Enter an invoice number.
Invoice Amount	Enter the invoice amount the vendor charged for this service.

Invoice Date	Enter the invoice date or select the ▦ button to select from a calendar.
Invoiced	Displays the total invoiced amount for all the transactions.
Billed	Displays the total billed amount for all the transactions based on the rate table.
Available	Displays the available reserve balance.
Invoice Details	Displays summaries of all the transactions included in this invoice.
Add Detail	Select to open the Time Expense Details window .
Save and Close	Select to save your changes and return to the Time and Expense window .
Cancel	Select to return to the Time and Expense window without saving your changes.

8. To add an invoice detail, select the Add Detail link.
   The Time Expense Details window opens.

9. Complete the fields on Time and Expense Details window , as shown below.

Trans Type	Select the button to open the Rates list with the available transaction types and their corresponding rates, and select a transaction type code for this transaction.
	Based on the transaction type you select, RISKMASTER automatically populates other related fields on the window.
Claim Number	Displays the claim number.
Reserve Type	Displays the customer's reserve against which this payment will be posted, if you select the Postable check box.
Invoice Number	Displays the invoice number you entered on the Time and Expense Invoice window .
From/To Date	Enter the beginning and end dates for the period of service or select the ▦ button to select from a calendar.
Invoice Total	Displays the total invoice amount.
Item Amount	Enter the total amount for this transaction.
Billable	Select the option if you want to charge the client for this transaction.
Non-Billable	Select the option if you do not want to charge the customer for this transaction.

Non Bill Reason	Select the code that best describes the reason for not billing the customer, or select the ![search] button to select from the Code Selection window.
	This field gets enabled only when you select the Non Billable option.
Postable	Select the option if you want to post this payment against the customer's reserves.
Non-Postable	Select the option if you do not want to post this payment against the customer's reserves.
Reason	Enter a reason for selecting your options.
Item Calculator frame	
Override	Select the check box if you do not want to use the rates specified in the rate table.
Quantity	Enter the number of units you are billing for.
Unit	Enter the unit you are billing for.
	RISKMASTER automatically updates this information from the rate table if you do not select the override check box.
Rate	Enter the billing rate per unit.
	RISKMASTER automatically updates this information from the rate table if you do not select the override check box.
Total	Displays the total calculated billing amount.
Comments	Enter comments about the transaction or select the ![editor] button to open the RISKMASTER Editor and enter a short description of the transaction.
	RISKMASTER adds these comments to the claim comments.
Previous Comment	Displays the existing comments.
Amount of Invoice Total Not Applied	Displays the remaining invoice amount that has not been billed.

10. Select Save and Close.

    The Time and Expense Invoice window opens and the Invoice Details frame displays the invoice that you entered.

Note: You can enter more than one transaction. The total amount of all the transaction amounts must match the invoice amount you enter on the Time and Expense Invoice window.

11. On the Time and Expense Invoice window, select Save.

    RISKMASTER adds the invoice to the Time and Expense window and creates a payment to the vendor with a Released status.

Tips

To Send an Invoice to Customers

1.   From the main menu, select Search.
2.   From the Search menu, select Claims.
     The Standard Claim Search window opens.

3.   Search for the claim you want to send an invoice to a vendor for.
     The claim opens and a Claim node displays in the left navigation tree.

4.   From the left navigation tree, select the Financials under the required claim node.
     The Reserves window opens.

5.   Select the Time and Expense button.
     The Time and Expense window opens.

6.   From the Claim Rate Table field, select the button.
     A Code Selection window opens with the available rate tables.

Note: You must set up rate tables before you can create and invoice.

7.   Select a rate table.
     The rate table is added to the Claim Rate Table field.

8.   Select the New button.
     The Time and Expense Invoice window opens.

9.   Complete the fields in the Time and Expense Invoice window.
10. Select the Add Detail link.
     A Time Expense Details window opens.

11. On the Time Expense Details window, enter transaction details.
12. Select Save and Close.
13. Similarly enter more transaction details if you want to.

Note: The total of all the transaction amounts must match the invoice amount you entered on the Time and Expense Invoice window.

14. On the Time and Expense Invoice window, select Save.
     RISKMASTER adds the invoice to the Time and Expense window and also creates a payment to the vendor with a Released status.

15. Next to the Invoice name, select the Bill It? check box for the invoice you created.
16. Select the Bill It button.
     RISKMASTER adds the bill to the Time and Expense (Billed Expenses) window.

17. Select the Billed Expenses button.
     The Time and Expense (Billed Expenses) window opens.

18. Select the check boxes for the invoices you want to print.
19. Select the T&E Report button.
     The invoice opens along with the print window.

20. Use the Print window to print the invoice.

To Work with Invoices

After you create an invoice , you can bill it and print a Times and Expense (T&E) report. You can also void an invoice that you have not billed.

To print Time and Expense report

1. On the Time and Expense window, select the Bill It? check box for the invoice that you want to bill.

2. Select the Bill It button.
    RISKMASTER adds the bill to the Time and Expense (Billed Expenses) window.

3. Select the Billed Expenses button.
    The Time and Expense (Billed Expenses) window opens.

4. Select the check box for the invoices you want to print.

Note: You can print only one invoice at a time.

5. Select the T&E Report button.
    A Print Report opens and displays the Time and Expense report.

6. Select Print.

To void an invoice

1. On the Time and Expense window, select the Bill It? check box for the invoice that you want to void.
2. Select the Void It button.
    A window opens and displays a warning message.

3. Select OK.
    RISKMASTER voids the payment check for the invoice.

To review the invoice details

1. On the Time and Expense window, from the invoice list, select the [icon] button.
    The Invoice Details window opens and displays the invoice details.

2. Select the Close button.

To edit invoice details

1. From the Time and Expense window, select the link of the invoice for which you want to edit the invoice details.
    The Time Expense Details window opens.

2. From the Invoice Details frame, select the link for the invoice, that you want to edit.
    The Time and Expense Details window opens.

3. Edit the information in the fields.
4. Select the Save & Close button.

EFT

EFT Overview

You can set up EFT banking information to provide EFT payments from .

To make an EFT payment the bank account must be designated as an EFT bank account and the payee entity must have an EFT bank account assigned to them. You can assign an EFT bank account to an entity in Entity maintenance. If you try to make a funds transaction for a payee who does not have EFT banking set up then RISKMASTER lets you enter EFT information for the payee on the fly. Only one active EFT bank account is allowed per entity.

If a funds transaction is created using a non-EFT bank account and the payee has EFT Banking Information saved, RISKMASTER saves the payment without accessing the EFT information and the payment is made by check.

Printing checks from an EFT Bank Account creates an EFT file based on the bank account config file. Each EFT bank account has a config file associated with it with the same name as the bank account ("bank_account_name_EFT.config). You must create and configure the config file for each bank account and maintain the security, encryption, archival, and transmission for the config file.

An EFT file is created for each EFT transaction regardless of whether or not the system is set to print checks to file. If a transaction is made from an EFT Bank Account the system will only create an EFT file it will not print checks to printer, pdf, or file.

You can only access this module if you have the appropriate permissions set up in the Security Management System.

Funds Transactions and EFT

Issuing Checks
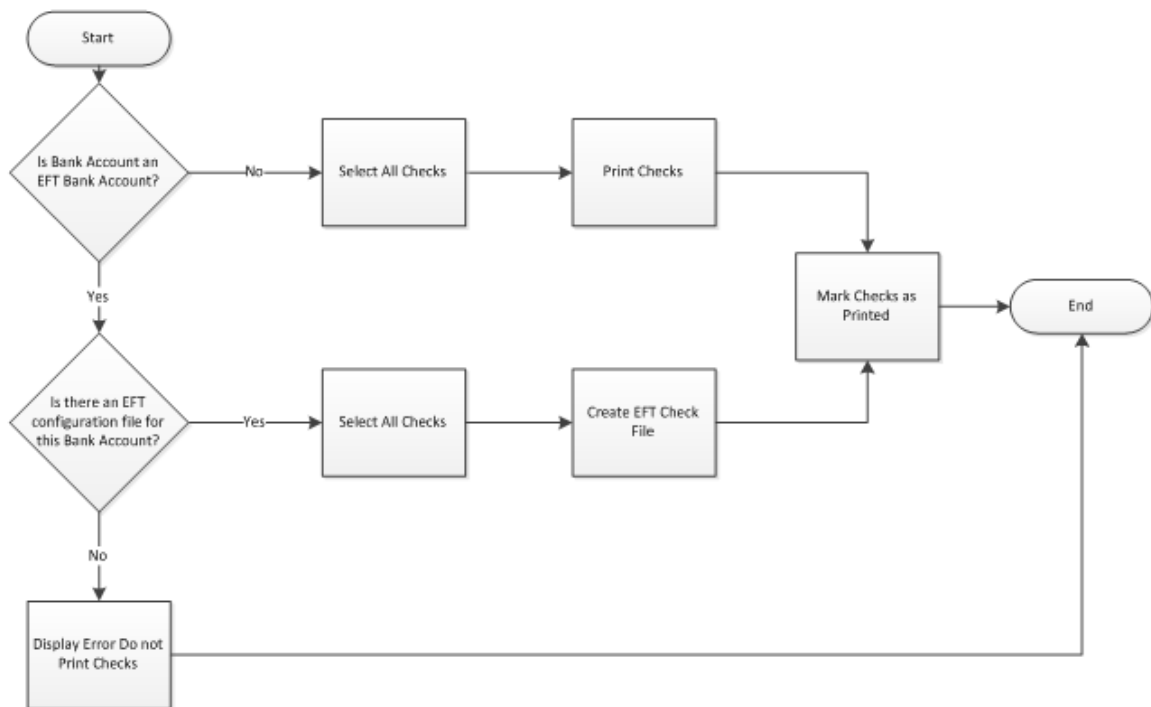
Creating Funds Transactions
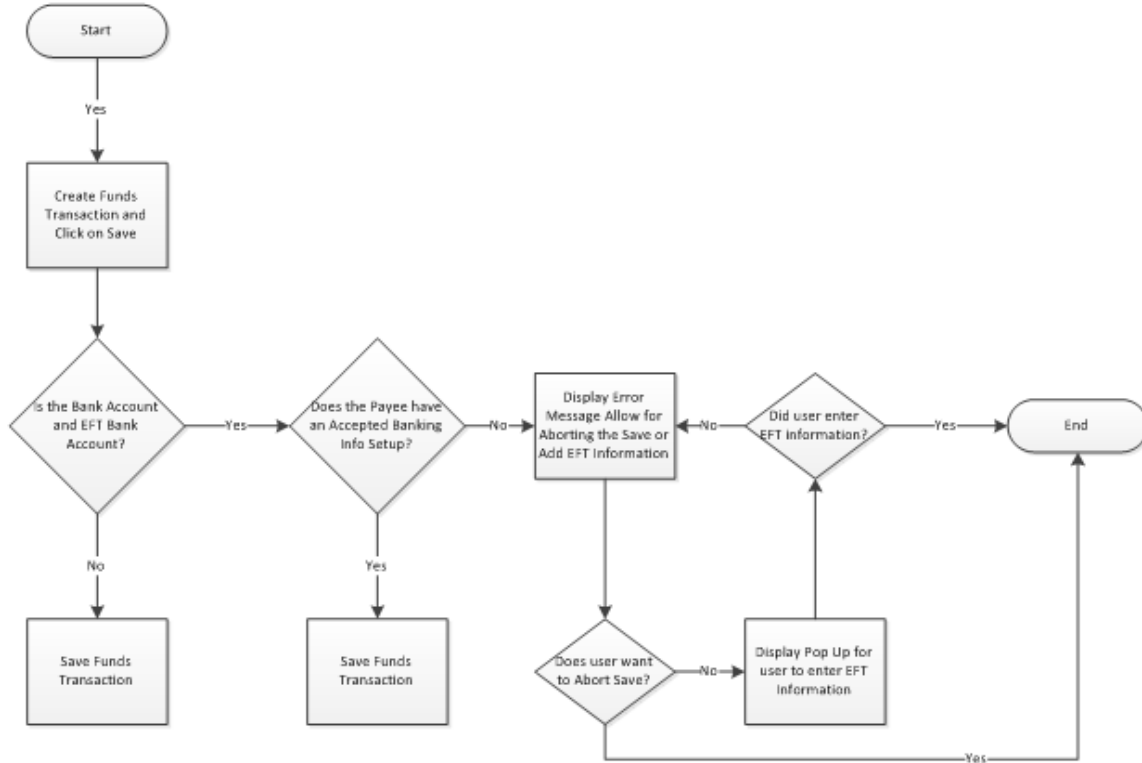
To Enable EFT for Bank Account

1.   Search or open the bank account which you want to use for EFT payments.

     The Bank Account window opens.

2.   On the Bank Account window, select the EFT Account check box.

     > Note: When you select the EFT Account check box, the Transit /Routing Number field becomes
     >   mandatory.

3.   In the Transit/Routing number field enter the unique number to be used in electronic transactions.

     > Note: If the Bank Account is an EFT Bank Account the system will print checks to an EFT file and will
     >   not print checks to a printer, pdf, or check file, regardless of the Print To File Settings in
     >   Utilities.

     When Printing Checks if the Bank Account is an EFT Bank Account and the EFT Configuration file is not found
     the system will display an error and not print checks.

To View and Enter Banking Status

1.   Search and open the entity record for which you want to setup banking information.

     The entity record opens.

2.   From the toolbar, select the banking Information Setup [icon] button.

     The Banking Information Setup window opens.

3.   From the Banking Status field, select the [icon] button.

     The Banking Status History window opens.
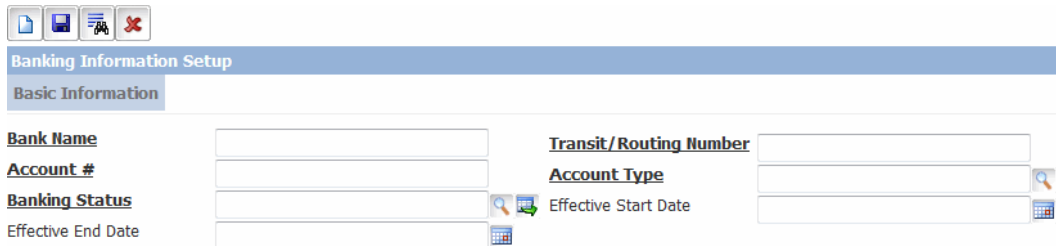
4.   Complete the fields on the Banking Status History window as shown below.

     Status   Select the new status for the EFT banking for entity

Date	Displays the name of the logged in user who changes the EFT banking status
Changed By	Enter the name of the user who approves the change d status
Approved By	Enter a reason to change the banking status
Reason	The grid displays the record of all the changes made to the banking status
OK	Select the button to Save the record.
Cancel	Select the button to close the window and discard the changes.
Print	Select the button to print the banking Status history

To Enter Banking Information for Entity

1. Search and open the entity record for which you want to setup banking information.
   The entity record opens.

2. From the toolbar, select the button.
   The Banking Information Setup window opens.

3. Complete the fields on the Banking Information Setup window, as shown below.

Bank Name	Enter the name of the bank associated with the entity.
Account #	Enter the account number associated with the entity.
Banking Status	Enter the status or select the button to select the banking status from the Code Selection window. Select the button to open the Banking Status History window. Note: EFT Banking statuses include A – Active, P – Pending, R – Rejected, and T – Terminated. Only one EFT bank account with a status of A – Active, will be allowed per entity
Effective Start Date	Enter the date or select the button to select the date when the entity becomes effective.
Transit/Routing Number	Enter the unique routing number.
Account Type	Enter the account type or select the button to select the account type from the Code Selection windo. Note: EFT Account Type include

CA Checking Account

CDA Cert of Deposit Account

JA Joint Account

SA Savings Account

Effective End Date   Enter the date or select the 🔲 button to select the end date until the EFT banking information will be active for the entity.

4.   Select the 💾 button to save the record.

Exchange rate Setup

To Edit Existing Reserve- Carrier Claim

Note: The Edit Existing Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

1.   Search for the claim you want to edit a reserve for.
2.   From the left navigation tree, under the required claim node select the Financials link.
     The Reserves window opens.

3.   From the toolbar, select the Edit Reserve 🖉 button.
     The Edit Existing Reserve window opens.

4.   Complete the fields on the Edit Existing Reserve window, as shown below.

Policy Name   Displays the Policy Name attached to the claim.

Unit   Displays the code that best describes the vehicle type.

Coverage Type   Displays the coverage type for the reserve.

Reserve Type   Displays the reserve type.

Reserve Sub-Type   From the dropdown select the code that best describes the type reserve sub category.

> Note: The options displayed in this field are based on the type selected in Reserve Type field.

Loss Type   From the drop down list, select the code that best describes the loss.

Note: This field will be part of the financial key.

Amount   Enter the reserve amount.

> Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.

Reserve Balance   Displays the balance amount remaining in the reserve after the payments made.

Currency Type   From the Currency Type field, select the lookup button to select a different currency for the reserves. The system converts the entered currency to claim currency

> Note: By default, claim currency will display in the Currency Type field. If the payment is not associated with a claim, the currency type will default to Base Currency.

Status   From the drop down list, select the status of the reserve.

If you select Close, the claim will not be closed automatically.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.

Reason   From the drop down list, select the reason why you are changing the reserve amount.

OK   Select to save your changes and close the window.

Cancel   Select to close the window without saving your changes.

To Add New Reserve- Carrier Claim

Note: The Add New Reserve window opens only when the Use Carrier Claims on the General System Parameter Setup is selected.

1. Search for the claim you want to edit a reserve for.
2. From the left navigation tree, under the required claim node select the Financials link.

   The Reserves window opens.

3. From the toolbar, select the Add New Reserve [icon] button.

   The Add New Reserve window opens.

Add New Reserve	
Policy Name	0009999
Unit	
Coverage Type	Directors & Officers Liab
Loss Type:	Hand
Reserve Type	Expense
Reserve Sub Type	
Amount:	$0.00
Status:	
Reason:	
OK	Cancel

4. Complete the fields on the Add New Reserve window, as shown below.

Policy Name	From the drop down list, select the Policy Name.
Unit	From the drop down list, select the vehicle type for the reserve.
Coverage Type	From the drop down list, select the coverage type for the reserve.
Reserve Type	From the drop down list, select the reserve type.
Reserve Sub-Type	From the dropdown list select the code that best describes the reserve sub category. Note: The options displayed in this field are based on the type selected in the Reserve Type field. Note: The codes in this field are populated from the user code table.

Loss Type	From the drop down list, select the code that best describes the loss.
	Note: This field will be part of the financial key.
Amount	Enter the reserve amount.

> Note: If the Amount exceeds the reserve limit then the user will be prompted that reserve will go for supervisory approval and the status will change to 'Hold' and will turn the Status field to read only.

Status	From the drop down list, select the status of the claim.

> Note: If the reserve status is explicitly selected as "First & final Payment" then this indicates that it was created automatically for a first and final payment. You cannot change this status.

When the amount set exceeds the reserve limits, the reserve status is set to Hold and the field will turn to read only. No payment /collection is allowed when the reserve status is set to Hold.

Reason	From the drop down list, select the reason why you are changing the reserve amount.
OK	Select to save your changes and close the window.
Cancel	Select to close the window without saving your changes.

To Create a Reserve

1. Search for the claim you want to create a reserve for.
2. From the left navigation tree, under the required claim node select the Financials link.

3. The Reserves window opens.

4. From the list of reserves, select a reserve.
   The Reserve for claim window opens.

5. Complete the fields in the Reserve for claim window , as shown below .

Date	Enter the date on which the new reserve takes effect or select the button to select from a calendar. Usually this is the current date.
Reserve Amount	Enter the new reserve amount.
Status	From the drop down list, select the status of the claim.

User ID	Displays your RISKMASTER User ID. You can enter a different user ID if you want.
Reason	From the drop down list, select the reason why you are changing the reserve amount.
Currency Type	Select the lookup button to select a different currency for the reserves. The system converts the entered currency to claim currency.
	If the payment is not associated with a claim the currency type will default to Base Currency.

6. In the Date field, enter the date on which the new reserve takes effect or select the button to select from a calendar. Usually this is the current date.
7. n the Reserve Amount field, enter the new reserve amount.
8. In the Status field, from the drop down list select O for open.
9. In the User ID field, enter your RISKMASTER user ID. You can enter a different user ID if you want.
10. From the Reason drop down list, select the reason for creating the reserve.
11. In the Assigned Adjuster field, select the adjuster associated with the reserve.
12. From the Currency Type field, select the lookup button to select a different currency for the reserves. The system would convert the entered currency to claim currency.
13. Select Modify.

Funds Split Detail Window

Use the Transaction Detail Entry window to enter payment or collection details. RISKMASTER displays the details you enter on this window in the Transaction Detail frame on the Funds Management window.

To open

From the Funds Management window: Transaction Details tab, select the button.

Field definitions

Currency Type	Select the lookup button to select a new currency type in which you want to enter the transaction split amount.
	Note: If the payment is not associated with a claim the Currency Type will default to Base Currency.
Exchange Rate	Enter the new exchange rate based on which you want to calculate or convert the amount from selected currency into base currency.
	Note: If the exchange rate entered has a variance of more than 10 % than the actual rate defined in the system, a warning message is displayed. If you select the OK button on the warning window, the exchange rate specified here overrides the exchange rate in the system table.
First And Final Payment	The First And Final Payment check box is checked automatically and read only. This option lets you create a First And Final Payment, which means you can make a payment without setting a reserve beforehand. When you create the payment, the reserve is created on the fly.
	Note: When you open the Funds Split Details window from the claim navigation tree without selecting a reserve from the financial/reserve grid, the 'First & Final Payment' check box is selected automatically and is read only. If you do not want this check box to be selected, open the Funds window (Funds menu > transaction) and search for a claim, and then uncheck the 'first & Final Payment' check box.

Policy   From the Policy drop down list, select the name of policy.

> Note: The Policy field is only visible when **the Use Carrier Claim Settings check box is** selected in Utilities.

Unit   From the Unit drop down list, select the generic unit.

> Note: The Unit field is only visible when **the Use Carrier Claim Settings check box is** selected.

Coverage   Enter the type of coverage for the reserve account or select the button to select from the Code Selection window.

> Note: The Coverage field is only visible when **the Use Carrier Claim Settings check box is** selected.

Transaction Type   Enter the reserve account to which you want to apply the transaction, or select the button to select from the Code Selection window.

Reserve Type   Displays the reserve type for the reserve account.

> Note: This field is read-only by default. To be able to modify the reserve type in this field, in RISKMASTER Utilities, on the General System Parameter Setup window, select the Use Res Type to Filter Trans Type check box.

Reserve Balance   Displays the balance remaining in the reserve account you selected in the Transaction Type field.

Note: The Reserve Balance is shown as zero for first and final payment. For payments other than first and final payment, the Reserve Balance is the actual reserve balance for the selected reserve.

Reserve Balance (Claim Currency) Displays the balance remaining in the reserve account you selected in the transaction type field.

> Note: The field is visible only when the Use Multiple Currency check box on the Globalization Settings tab is checked. The Reserve Balance (Claim Currency) field displays the balance defined in the claim currency.

Amount   Enter the transaction amount.

GL Account   Enter the general ledger fund from which you want to make this transaction, or select the button to select from the Code Selection window.

From and To   Enter the date range for the service period or select the button to select from a calendar. For example, for a hospital stay, enter the admission date and the discharge date.

Invoiced By   Enter the name of the payee who sent you the bill in response to which you are making the transaction.

Invoice Number   Enter the invoice number or any other identifying number that displays on the bill.

Invoice Amount	Enter the billing amount that displays on the bill.
Invoice Date	Enter the bill date that displays on the bill.
P.O. Number	Enter your organization's internal purchase order number.
OK	Select to save the payment and display the information in the Transaction Detail frame on the <u>Funds Management window</u>.
Cancel	Select to close the window without saving the information you entered.

Policy System Interface

Policy Interface Overview

The Policy Interface allows RISKMASTER r8 to retrieve policy data from external policy systems such as POINT. This interface uses existing Security Management settings and permissions related to the policy.

Policy data is only retrieved as needed from the external policy system. It is not stored in the RISKMASTER database. You cannot edit or update the data.

Policy data can be viewed in the Search and Lookup windows. Once a policy has been attached to the claim, you can view Policy/Coverage information in the corresponding RISKMASTER Policy windows in read-only mode.

A web service call is executed every time a user requests policy data and the most recent data is retrieved and displayed. A claim can have multiple policies attached to it.

To Activate and Setup Policy System Interface in RISKMASTER

1. From the main menu, select Utilities.
   The Utility menu opens.
2. From the Utility menu, select System Parameters.
   The System Parameters menu opens.
3. From the System Parameters menu, select General System Parameter Setup.
   The General System Parameter Setup window opens.
4. On the General System Parameter Setup window, select the Carrier Claim Settings tab.

5. In the Policy Interface Settings field, select the 'Use Policy System Interface' check box, to activate the Policy System Interface.

> Note: To activate the Policy System Interface, you must first activate the Carrier Claims by selecting the Use Carrier Claims check box on the Carrier Claim Settings.

6. Select the 'Allow Policy Search' check box, if you want to enable internal policy search functionality while attaching policy to claim on Claim window.

7. Select the 'Fetch records on policy search' option if you want system to retrieve records when policy search is done.

8. Select the 'Download External Policy as Claim Based' option if you want to download policies from external system based on claim records.

9. Select the 'Download External Policy as Event Based' option if you want to download policies from external system based on event records.

10. Select the 'Use Code Mapping' option if you want to enable and use policy system code mappings.

11. Select the Save button.

To Work with Policy System Download

To work with Policy System downloads, you must first activate the Policy System Interface by selecting the Use Policy System Interface check box on the General System Parameter Setup window: Carrier Claim Settings tab.

Note: **You can also download policy from a claim window**.

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Policy System Download.

   The Policy System Download window opens and a Policy System Download link displays under Maintenance node in the navigation tree.

3. Complete the fields on the Policy System Download window , as shown below .

   Policy Search Criteria

System Name	From the drop down list, select the name of the policy system interfaceyou want to download policy from or want to search policy records for.
Policy Number	Enter a unique identifying number for the policy.

Policy Symbol/Name	Enter a unique identifying name for the policy.
Module:	Enter the name of the policy module for which you want to search policy records from policy system.
Policy State	Enter the name of the state which policy belongs to.
Line Of Business	Enter the line of business for which you want to search the policy records/.
Location Company	Enter the name of the company at the policy location for which you want to search policy records.
Insured Zip	Enter the Zip code of the location of person insured in policy.
Customer Number	Enter the unique customer number for the policy.
Master Company	Enter the name of the master company responsible for policy.
Agent	Enter the user defined code number and name of the agency responsible for handling the insurance policy. This information downloads from the host system.
Insured City	Enter the name of the city of the person insured in policy.
Insured SSN	Enter the Social Security Number of the person insured in policy.
Data DSN	Enter the data source name of the database to connect to the policy system. To configure the DSN select the Add button next to the field to open the Add New Data Source window. To clear the contents of the DSN, select the Clear button.
Copy Data DSN to Client DSN	Select the checkbox if the data DSN and the client DSN are same.
Client DSN	Enter the client data source used to connect to the policy system and download the records from the external policy system.
Group Number	Enter the unique number of the policy group.
Insured Last Name	Enter the last name of the person insured in policy.
Insured First Name:	Enter the first name of the person insured in policy.

Date of Loss	Enter the date on which incident or event occurred or select the [calendar icon] button to select from a calendar.
Submit Query	Select to search the database and display the results.
Clear	Select to clear all the unsaved values on the window.

To Download Policy from Claim window

1. Search and open the claim for which you want to download the policy.
2. Select the Download Policy button next to the Policy Name field.

   Note: The system validates the Date of claim, date of event etc. If claim is new then you must first enter values for these fields.

   The Policy System Search window opens.
3. Enter the search criteria and then from the Lookup results window select the required policy.
4. From the list of policies, select a policy and select the Inquiry button to view the details of the selected policy.
5. You can also download the selected policy (Including related entities, units & coverages) by selecting the Save button

   Once the policy is downloaded, system checks the data on the claim form against the policy being attached.
6. If it is validated then system will attach the policy to the claim if not a validation message displays that policy information does not match to the claim.
7. Select the Save button on the Claim window, to check that the policy is valid for the claim.

   > Note: If multiple policies are attached to the claim then on claim save system will validate each policy and incase some policies are not qualified system will display the validation message with invalid policy names.

To Work with Policy Interface Code Mapping

To activate Policy Interface Code Mapping in the Policy Setup, you must first activate the Policy System Interface by selecting the Use Policy System Interface check box on the General System Parameter Setup window: Carrier Claim Settings tab.

1. From the Utilities main menu, choose Managers.

   The Managers menu opens.
2. From the Managers menu, choose Policy Setup.

   The Policy Setup menu opens.
3. From the Policy Setup menu, choose Policy Interface Code Mapping.

   The Policy Interface Code Mapping window opens and a Policy Interface Code Mapping link displays under Utilities node in the navigation tree..
4. Complete the fields on the Policy Interface Code Mapping window, as shown below .

Select Policy System	From the dropdown list, select the policy system which you want to use for mapping of codes.
Select Code Type	From the drop down list, select the appropriate code type.
RISKMASTER Codes	From the drop down list, select the appropriate RISKMASTER codes.
Policy System Interface Codes	From the drop down list, select the appropriate policy system interface codes.

Add Policy Code	Select the **Add Policy Code** button to add policy code to the table.
Remove Policy Code	Select the check box against the code that you want to remove from the table and then select the **Remove Policy Code** button.

To Add Policy System Web Settings Details

1. From the Utilities main menu, choose Managers.
   The Managers menu opens.

2. From the Managers menu, choose Policy Setup.
   The Policy Setup menu opens.

3. From the Policy Setup menu, choose Policy System Setup.
   The Policy System Setup window opens.

4. To add policy system web settings details, select the button..
   The Policy System Web Settings window opens.

5. Complete the fields on the Policy System Web Settings window , as shown below .

Policy System Name	Enter a policy system name that you want to set for a claim.
Domain	Enter the domain name.
License	Enter the license number.
Proxy	Enter the proxy server address.
User Name	Enter the user name to use to access this data source.
Password	Enter the case-sensitive password information.
Confirm Password	Re-enter the password.
URL Parameter	Enter the URL parameter.
Financial upload	Select the check box if you to upload financial data for the policy system.
Default Policy System	Select the check box if you want to select the default policy system.
OK	Select the button to save the new policy system web settings and display the settings in the Policy System Setup frame on the Policy System Setup window.

Cancel	Select the button to close the window without saving the settings you entered.
Change Password	Select the button to change the password.
Mapping Table Prefix	Enter the prefix of the mapping code table used for mapping external policy system codes to rma codes.
Policy System Name	Enter the name of the policy system used for the policy download.
Version	Enter the version of the policy system used for policy download.
Client File Setting	Select the check box if policy system is configured to client file setting as ON.
Use RMX User for CFW	Select the checkbox if you want to use RMX user name for the policy interface
CFW User Name	Enter the user name for the policy interface.(Applicable when setting "Use RMX User For CFW" is disable.)
Location Company	Select the code of the location company associated with the policy
Master Company	Select the name code of the master company associated with the policy. (eg 05)
Business Entities Code	Enter the codes for the business entities used in external policies. The codes should be in CSV (comma separated value) format.
Exclude Major Peril	Enter the codes or names for major risks or perils which you want to exclude while policy download . The codes should be in CSV (comma separated value) format.
Exclude Additional Interests	Enter the codes or names for the various additional interests f which you want to exclude while policy system download. The codes should be in CSV (comma separated value) format.

The Policy System Web Settings frame on the Policy System Setup window, displays the details of the policy.

To Work with Policy System Web Settings

To edit policy system web settings

1. On the Policy System Web Settings window, select the option that you want to edit settings.

2. Select the Edit button.

   The Policy System Web Settings <u>window</u> opens.

3. Edit the information in the fields.

4. Select the Ok button.

   The Policy System Web Settings window displays the edited settings.

To delete a policy system web settings

1. On the Policy System Web Settings window, select the option that you want to delete.

2. Select the Delete button.

   RISKMASTER deletes the selected policy system web settings.

Notes

Enhanced Notes Window

Use the Enhanced Notes window to see notes attached to an **event** or a claim . You can view the **enhanced notes** in the upper frame of the window with the most recent note being the first. You can re-order the columns on the Enhanced Notes window by simply dragging and dropping a column header to change the position of the column.

You can select the Create New button to enter new claim notes. You can also modify the list of notes available by selecting the advanced search button. Select a note from the upper frame to display more details about the note in the two fields below.

To open
- Search for the claim or event you want to attach an enhanced note to.
- The event opens in the event window or the claim opens in a Claim window.
- From the toolbar, select the Enhanced Notes button .
- The Claim Enhanced Notes window opens.

Toolbar Buttons

Advanced Search   Select the button to open the Advanced Search window.

Create Note   Select the button to create a new enhanced note for a claim or an event.

Edit Note   Select the button to edit an existing enhanced note.

Note Attachment   Displays the note text entered while creating the enhanced note.

Delete Note   Select a note and then select this button to delete the selected enhanced note..

View All Notes   Select the button to display all the enhanced notes in ascending order.

Templates   Select the button to open the Enhanced Notes Templates window and select a template to use for enhanced notes.

🖶 Print Notes	Select the button to display the notes in a Print Preview window. You can select any one of the following:

- **Print Selected Note :** Select a note and then select this option to display the selected note in a Print Preview window.

- **Print All Notes:** Select the option to display all the notes in a Print Preview window.

- **Print Notes by Note Type:** Select the option to display the notes by selected note type in the Print Preview window.

> Note: You need to select a Note Type before selecting the Print Notes button.

Field definitions

Activity Date	Displays the date of creation of the Enhanced note.
Attached To	Displays the event or the claim number to which the note is attached to. If you have an event window open, the Enhanced Notes window displays notes associated with all the claims related to that event. If you have a Claim window open, the window displays notes associated with that claim only.
Notes Type	Displays the note type code and description selected from the Note Type Codes List. If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note.

> Note: **You can change the Note Type for a enhanced note. If the note type is that of a system generated note, you cannot change the note type.**

Notes Level	Select the event, claim or claimant level at which you want to filter the enhanced notes records.
User Type	Displays the users who are allowed access to the enhanced note.
Note Text	Displays the note text entered while creating the enhanced note.
Entered By	Displays the name of the user who entered the enhanced note.
Date/Time Created	Displays the date/Time of creation of the enhanced note.
Important	Displays whether the Enhanced Notes is important or not.
Subject	Displays the information describing the content of the note. It is an optional field and is used only for display.

Templates Window

- Search for the claim or event you want to attach an enhanced note to.

- The event opens in the event window or the claim opens in a Claim window.

To open

- From the toolbar, select the Enhanced Notes button 📝 .

- On the Enhanced Notes window, select the Templates button.

Field definitions

Template Name	Displays the name of the template.
Entered By	Displays the name of the user who created the template.
Create Template	Select the button to open a window that lets you create a new enhanced notes template.
Edit Template	Select an existing template and then select the button to open a window that lets you edit the template.
Delete Template	Select an existing template and then select the button to delete the template.
Back to Notes	Select the button to close the window.

Enhanced Notes Entry Window

Use the Enhanced Notes Entry window to create enhanced notes attached to an **event** or a claim . You can format the note text by selecting different format options.

To open   From the Enhanced Notes window, select the Create Note button.

Field definitions

Note Type

Enter the code that best describes the note type or select the button to select from the Code Selection window.

If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note. You have to select a note type to complete a enhanced note.

> Note: **You can change the Note Type for an enhanced note. If the note type is that of a system generated note, you cannot change the note type.**

Activity Date   Enter a date for creation of the enhanced note. By default, the Activity Date is the current system date.

Note Attached To   Select a claim or the event to which you want to attach the note to. If a note applies to all claims related to an event, do not associate it with an individual claim.

> Note **when you choose to create an enhanced note at the claimant level, this field displays claimants attached to a claim along with the event, its associated claim(s) and other claimants associated with other claims on an event.**
>
> **The enhanced notes at the claimant level are only displayed when the required permissions are set in the Security Management System.**

Template(s)   Select the ellipses button to open the Enhanced Notes Templates window and select a template for enhanced notes.

Cancel   Select the button to close the window without saving your changes.

Create Another Note   Select the button to create a new note for the same claim without closing out of the window.

Note: You must save the previous comment before trying to create a new note. When you select the 'Create Another Note' button the contents of the previous note are cleared. If try to create a new note without saving the existing note open in the window, an error message is displayed.

Subject   Enter the information describing the content of the note. It is an optional field and is used only for display.

Back To Notes   Select to return back to open the Enhanced Notes window.

Advanced Search Window

Use the Enhanced Notes Search window to modify the list of notes available for viewing. The list is limited to the notes attached to the Event associated with the current claim , and whether or not the note type is a confidential note type.

To open   From the Enhanced Notes window, select the Advanced Search button.

Field definitions

Event Number   Displays the number of the event to which the list of notes is attached.

Claim(s)   Select Claim option to open the Claim Selection window, and select the claim for which you want to view the enhanced note.

User Type(s)   Select the [🔍] button to open the Code Selection window and select the user type who has access to the enhanced notes.

> Note: **There is a user type for each security group. When you add a user to a group, the user inherits the user type code for that group.**

Entered By   Select the [🔍] button to open the Code Selection window and select the system user who entered the enhanced notes.

Claimant   Select Claimant option to open the Claim Selection window, and select the claimant for whom you want to view the enhanced note.

Note Type(s)   Enter the code that best describes the note type or select the [🔍] button to select from the Code Selection window.

Activity From Date   Select [📅] button to select the start date from which you want to view the enhanced notes.

Activity To Date   Select [📅] button to select the end date till which you want to view the enhanced notes.

Notes Text contains   Enter the text you want to search for in the Note Text field in the notes list.

Sort By   From the drop down list, select the criteria you want to use to sort the notes list in order of importance. Begin with the most important criteria on the left, followed by the second most important and so on. You can sort the list by:

- **Entered By:** Name of the user who entered the note.

- **Note Type:** The type of note (Supervisor, System and so on.)

- Note: If the note type is of type confidential, then only the entering user and the entering user's supervisor can view the note.

- **Activity Date:** A date range for the creation of the note.

- **User Type:** A code defined for each security group and inherited by a user added to that group.

  Note: The sorted order of notes list is maintained for that particular user when ever user opens the window.

Subject   Enter the text you want to search for in the Subject field in the notes list.

Important   Displays whether the Enhanced Notes is important or not.

Return   Select the button to view the enhanced notes list.

Cancel   Select the button to close the window.

To Create an Enhanced Note

1. Search for the claim or event you want to attach enhanced notes to.
   The event opens in the event window or the claim opens in a Claim window.

2. From the toolbar, select the Enhanced Notes button .
   The Enhanced Notes window opens.

3. On the Enhanced Notes window, select the Create Note button.
   The Create Notes window opens.

4. Complete the fields on the Create Notes window, as shown below.

   Note Type

   Enter the code that best describes the note type or select the button to select from the Code Selection window.

   If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note. You have to select a note type to complete a enhanced note.

   You can change the Note Type for an enhanced note. If the note type is that of a system generated note, you cannot change the note type.

   Activity Date   Enter a date for creation of the enhanced note. By default, the Activity Date is the current system date.

Note Attached To	Select a claim or the event to which you want to attach the note to. If a note applies to all claims related to an event, do not associate it with an individual claim..

When you choose to create an enhanced note at the claimant level, this field displays claimants attached to a claim along with the event, its associated claim(s) and other claimants associated with other claims on an event.

Enhanced notes at the claimant level are only displayed when the required permissions are set in the Security Management System.

Cancel	Select the button to close the window without saving your changes.
← **Back To Notes**	Select to return back to open the Enhanced Notes window.
Template	Select the ellipses button to open the Enhanced Notes Templates window and select a template for enhanced notes.
Create Another Note	Select the button to create a new note for the claim without closing the window and navigating back to the Enhanced Notes window.

You must save the previous comment before trying to create a new note. When you select the 'Create Another Note' button the contents of the previous note are cleared. If try to create a new note without saving the existing note open in the window, an error message is displayed.

5. Select Save.

   RISKMASTER adds the note to the list of notes in the Enhanced Notes window.

To Print Enhanced Notes

To print all notes

1. Search for the claim or event you want to attach an enhanced note to.
2. The event opens in the event window or the claim opens in a Claim window.
3. From the toolbar, select the Enhanced Notes button .

   The Enhanced Notes window opens.

4. Select the Print All Notes option
5. Select the Print Notes button to display the notes in a print preview window.
6. On the Print Preview window, select the print button to get a printed copy of all the notes.

To print selected note

1. On the Enhanced Notes window, select the option against the note that you want to print.
2. Select the Print Selected Note option.
3. Select the Print Notes button to display the selected note in a Print Preview window.
4. On the Print preview window, select the print button to get a printed copy of the note.

To print notes by Note Type.

1. On the Enhanced Notes window, select the Print Notes by Note Type option.
2. In the Note Types field, select the button to open Code Selection window to select the required note type.
3. Select the Print Notes button to display the notes in a print preview window.

4. On the print preview window, select the print button to get a printed copy of the notes.

To Create Enhanced Notes Templates

1. Search for the claim or event you want to attach an enhanced note to.
    The event opens in the event window or the claim opens in a Claim window.

2. From the toolbar, select the Enhanced Notes button .
    The Enhanced Notes window opens.

3. On the Enhanced Notes window, select the Templates button.
    The Templates window opens.

4. On the Templates window, select the Create Template button.
    The Templates window opens.

5. On the Templates window, select the Create Template button.
    The Create Template window opens

6. In the Template Name field, enter the name of the template.

7. Create the template as required and then from the formatting toolbar, select the   button to save the template.
    The template you created is saved. You can edit or delete this template from the Templates window. The next time you create an enhanced note using the Enhanced Notes window you can select the template you created from the Template field and apply it to your enhanced note.

To Search for an Enhanced Note

1. On the Enhanced Notes window, select the Advanced Search button.
    The Advanced Search window opens.

2. Complete the fields on the Advanced Search window , as shown below .
1.

Event Number	Displays the number of the event to which the list of notes is attached.
Claim(s)	Select the button to open the Claim Selection window, and select the claim for which you want to view the enhanced note.
User Type(s)	Select the button to open the Code Selection window and select the user type who has access to the enhanced notes.
	There is a user type for each security group. When you add a user to a group, the user inherits the user type code for that group.
Entered By	Select the button to open the Code Selection window and select the system user who entered the enhanced notes.

Note Type(s)

Enter the code that best describes the note type or select the button to select from the Code Selection window.

Claimant

Select Claimant option to open the Claim Selection window, and select the claimant for whom you want to view the enhanced note.

Activity From Date

Select the start date from which you want to view the enhanced notes.

Activity To Date

Select the end date till which you want to view the enhanced notes.

Notes Text contains

Enter the text you want to search for in the Note Text field in the notes list.

Sort By

From the drop down list, select the criteria you want to use to sort the notes list in order of importance. Begin with the most important criteria on the left, followed by the second most important and so on. You can sort the list by:

- **Entered By:** Name of the user who entered the note.

- **Note Type:** The type of note (Supervisor, System and so on.)

   Note: If the note type is of confidential, then only entering user and user's supervisor can view note.

- **Activity Date:** A date range for the creation of the note.

- **User Type:** A code defined for each security group and inherited by a user added to that group.

The sorted order of notes list is maintained for that particular user when ever user opens the window.

Return

Select the button to view the enhanced notes list.

Cancel

Select the button to return to the Enhanced Notes window without saving the changes made to the Advanced Search window.

2.
3. To display the results of your search, select the Return button.

   The Advanced Search Results window opens.

4. Complete the fields on the Advanced Search Results window as shown below .

Activity Date

Displays the date of creation of the Enhanced note.

Attached To

Displays the event or the claim number to which the note is attached to. If you have an event window open, the Enhanced Notes window displays notes associated with all the claims related to that event. If you have a Claim window open, the window displays notes associated with that claim only.

Note Type	Displays the note type code and description selected from the Note Type Codes List. If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note.
	You can change the Note Type for a enhanced note. If the note type is that of a system generated note, you cannot change the note type.
Note Text	Displays the note text entered while creating the enhanced note.
Entered By	Displays the name of the user who entered the enhanced note.
Activity Date	Displays the date of creation of the enhanced note.
Date Created	Displays the date of creation of the enhanced note.
Time Created	Displays the time of creation of the enhanced note.
Entered By	Displays the name of the user who entered the enhanced note.
User Type	Displays the users who are allowed access to the enhanced note.
Attached To	Displays the event or the claim number to which the note is attached to. If you have an event window open, the Enhanced Notes window displays notes associated with all the claims related to that event. If you have a Claim window open, the window displays notes associated with that claim only.
Edit Note	Select the button to edit an existing enhanced note.
Print Notes	Select the button to display all the notes in a Print Preview window. On the Print Preview window, select the print button to get a printed copy of all the notes.
Delete Note	Select a note and then select this button to delete the selected enhanced note
Print Selected Note	Select a note and then select this button to display the selected note in a Print Preview window.
View All Notes	Select the button to display all the enhanced notes in ascending order.
Cancel	Select the button to close the window without saving your changes.
Back To All Notes	Select the button to return to the Enhanced Notes window.

To Configure Enhanced Notes Header

1. From the main menu, select Utilities.
2. From the main menu, select My Work
3. From the My Work menu, select Header Configuration

4. The Header Customization window opens.

5.   On the Header Configuration window, select Payment History Config tab

6.   Select the check boxes next to fields you want to display on the Enhanced Notes window.

7.   Enter the column header label for the field in the text box next to the field name.

8.   Select the Save Configuration button to save the settings.r

Enhanced Notes Overview

Use the Enhanced Notes feature to add notes to claims and events. Enhanced notes enable you to govern data handling and manage tasks related to claims and events. You can sort enhanced notes by adjuster, date, user type and note type and can maintain the sorted order of enhanced notes for that particular user when ever user opens the Advanced Search window.

While viewing existing enhanced notes, you can re-order column headers, print notes by note type, and create enhanced notes templates. You can also restrict editing rights to the user who creates a note and you can specify a time frame within which a note can be edited.

You must enter a Note Type code to create and complete an enhanced note. To create a new note or view notes related to an event or claim, search for the event or the claim you want to associate the note with and then open the Enhanced Notes window.

Executive Summary Scheduler

The Executive Summary Scheduler for Executive Summary and Enhanced Notes helps handle large amounts of data in Executive Summary and Enhanced Notes reports. You can specify a threshold value in the WCFService\appSettings.config file deployed on the server.

<add key="ExecSummaryOfflieThreshold" value="10"/> <!—Number of Pages

<add key="ExecSummaryOfflineHours" value="20:00"/> <!—24 hr format time. If blank value it gets executed immediately.

For Executive Summary:

When you select the Executive Summary button on the toolbar for events, claims, etc., uses the threshold value you specified in the WCFService\appSettings.config file to generate a PDF file. While building the PDF file, RISKMASTER checks if the threshold value is crossed at every page. In case the threshold value is crossed the PDF generation process is aborted and an entry in created in the task manager database. RISKMASTER then displays a message telling you that the threshold criteria has been crossed and that the Executive Summary PDF will be generated offline and will be available for viewing from the Attachments button on the toolbar.

Once the PDF file is built, it is sent to the RISKMASTER X Document Management system. A diary entry is also created to let you know that the executive summary is available for viewing with a link to the original event or claim for which the executive summary was created.

For Enhanced Notes:

When you select the Print button for enhanced notes, the number of characters to be printed in the Enhanced Notes column in the database is checked. If the number of characters exceeds (2500 * Threshold Value), the PDF generation is skipped and scheduled into the Task Manager.

checks for duplicates and makes sure duplicate Task Manager task entries are not created each time the Executive Summary button or the Enhanced Notes Print PDF button is selected. It also checks the Task Manager database for existing entries and does not creating new duplicate entries.

To limit CPU utilization on the server during office hours, gives you the option to run the task entry during off hours by using the "Off Hours" entry in the WCFService\appSettings.config file. If you use the Off Hours option, the new Task Manager entry is scheduled to run at the off hour time specified in the config file. If the Off Hour value is left blank, the executive summary and the enhanced notes PDF task entries are created for immediate execution.

If the Media Content Management (MCM) interface is enabled, the PDF report is sent to the MCM web service.

> Note: For an executive summary with admin tracking tables the PDf report is uploaded to the RISKMASTER X base Document Attachment module even if MCM is enabled, since the MCM interface does not support Admin Tracking.

If the Email switch is enabled, the PDF report is sent as an Email attachment. The SMTP server and the ADMIN email sender details are obtained from the Security database.

Send Mail feature

To Activate Microsoft Outlook Feature and Set File Size

To Activate Microsoft Outlook feature

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose System Parameters
   The System Parameters menu opens.

3. From the System Parameters menu, choose General System Parameter Setup.
   The General System Parameter Setup window opens.

4. On the General System Parameter Setup window, select the 'Use Outlook To Send Email' check box.
   The Outlook feature activates with RISKMASTER X.

To Set Size of Files E-mailed Using Outlook

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose System Parameters
   The System Parameters menu opens.

3. From the System Parameters menu, choose General System Parameter Setup.
   The General System Parameter Setup window: System Settings tab opens.

4. In the ' Size Limit(in MB) for Files that can be emailed using Outlook' field enter the size of the file.
   > Note: You can enter minimum 1 and maximum 35 in this field.

System Setup

Code Lists

Codes Lists Overview

Codes lists contain standardized categories, labels, or abbreviations paired with a text description. RISKMASTER ships with over 127 code tables with defined codes. Your organization may add more code tables as well as add or modify codes in the existing tables.

You can import your organization's existing codes into RISKMASTER. This enables you to keep the records consistent with past records and it lets you continue using codes with which you are familiar. You can add your codes to the standard RISKMASTER database tables or add the codes to tables you create. If you create new tables, you can only use the codes in the supplemental fields.

Your code tables are set up during RISKMASTER installation.

> Note: Your system administrator may limit the people who may add, modify, or delete codes. If you do not have permissions, please see your system administrator.

Parent and Child Codes

RISKMASTER lists codes in code tables. Each table represents a type of code. For example, all the codes in the Claim Type table categorize the claims handled by your organization. You may have other code tables, such as those used with the Supplemental Fields created by your organization.

Using parent and child codes, you can link some types of codes to others. Your system administrator defines the codes that use parent codes when RISKMASTER is initially configured. Parent codes and child codes create a hierarchy that links one level of codes to another as shown next:
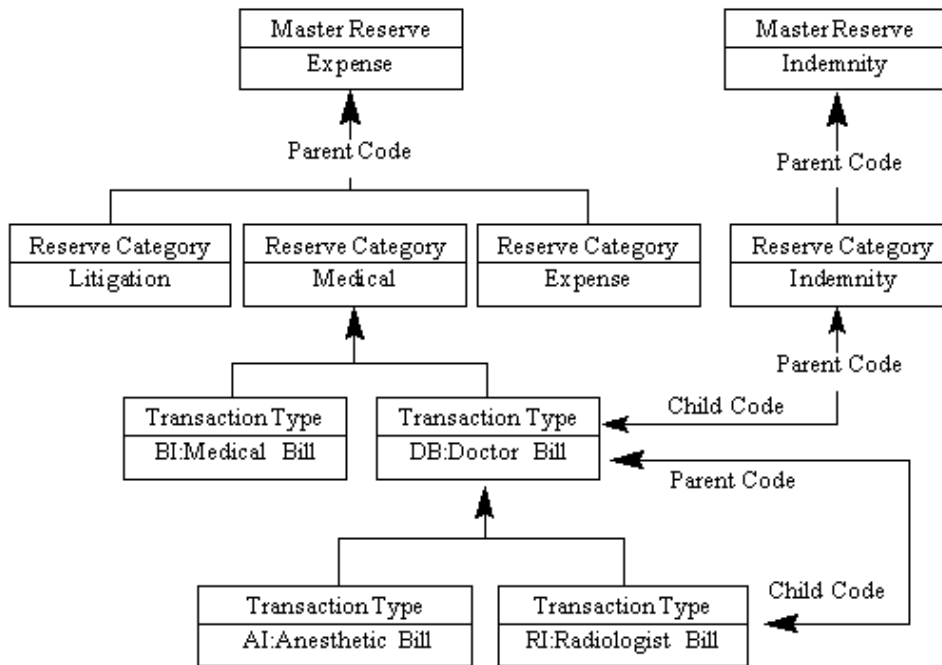
Codes Import File Layout

[Codes]

"Description"

"User Table Name", " SYSTEM_TABLE_NAME", Parent SYSTEM_TABLE_NAME, Glossary Type code, Language code

"Short Code", "Code Description", Parent short code, Line of Business short code

> Note: Every line must have a carriage return, including the very last line of data. A code file cannot have blank lines before the last code. A blank line can cause the upload to halt, producing incomplete code tables in the RISKMASTER database.

Definitions

Description	The long name for the RISKMASTER table.
User Table Name	The user name for the RISKMASTER table.
SYSTEM_TABLE_NAME	The technical name used internally for the table. If you specify a name that does not exist in the database, RISKMASTER will create a table called " SYSTEM_TABLE_NAME". The codes in this table can only be used with Supplemental Fields.
Parent system table name	SYSTEM_TABLE_NAME for the code's parent table.
Glossary Type code	A general category for your codes. You must supply one of three possible values:

- **2** means the codes will become System Codes, which are never shown to users.

- **3** means the codes will become User Codes, which users can select during data entry and other processes.

- **10** means the codes will become part of your Industry Standard Codes.

Language code	The language used in the database. For English-based installations, use 1033.
Line of Business short code	"WC", " GC", or "VA"

Examples:

No parent code, all lines of business:
[CODES]

"Body Parts"

Body Parts, BODY_PART,,3,1033

KN,Knee,,

WR,Wrist,,

No parent code, specific lines of business:
[CODES]

"Body Parts"

Body Parts, BODY_PART,,3,1033

KN,Knee,, GC

WR,Wrist,,VA

Parent codes, specific lines of business:
[CODES]

"Claim Type"

Claim Type, CLAIM_TYPE, COVERAGE_TYPE,3,1033

LT,Lost Time,WC,WC

MO,Medical Only,WC,WC

PD,Property Damage,GL, GC

To Add a Code

1. From the main menu, select Maintenance.
    The Maintenance menu opens.

2. From the Maintenance menu, choose Table Maintenance.
    The Table Maintenance window opens and a Table Maintenance link displays under the Maintenance node display in the left navigation tree.

3. From the drop down list, select the table type.
4. Select the Add Code button.
    The Enter Code Detail window opens.

5. Complete the fields on the Enter Code Detail window , as shown below .

Code	Enter a name for the code you are creating.
Description	Enter a description for the code you are creating.
Parent Code	If the code is a subset of another code, select the ¨¨¨ button to open the Code Texts window and select the parent code.
Industry Standard	If the code uses NCCI or CS codes, select the ¨¨¨ button to open the Code Texts window and select the appropriate Industry Standard table.
Line of Business	Select the ¨¨¨ button to open the Code Texts window and select the line of business.
Effective Trigger Date	From the drop down list, select the type of date trigger for the code.
Effective Start Date	If the code is only effective between a certain date range, enter the start date or select the ¨¨¨ button to select from a calendar.

Effective End Date	If the code is only effective between a certain date range, enter the end date or select the ▦ button to select from a calendar.
Effective For	Select the ⋯ button to open the Org Hierarchy window and select the organization level for which the code is effective.

6. Select Save.

    RISKMASTER adds the code to the table in the database.

To Add Code Tables

1. From the main menu, select Maintenance menu

    The Maintenance menu opens.

2. From the Maintenance menu, choose Table Maintenance.

    The Table Maintenance window opens and a Table Maintenance link displays under the Maintenance node display in the left navigation tree.

3. From the drop down list, select the table type.
4. Select the Add table button.

    The Enter Table Detail window opens.

5. Complete the fields on the Enter Table Detail window , as shown below .

System Table Name	Enter the System Table with which you want to associate the table you are creating.
User Table Name	Enter a name for the table you are creating.
	When you try to add codes to this table in RISKMASTER , the name you enter here is displayed. For example, when you create a User Code Table, on the Code Selection window in RISKMASTER, the name you enter in this field is displayed in the drop down list.
Parent Name	From the drop down list, select the parent table you want to associate with the table you are creating. The table you create will be a subset of the parent table.
Parent Table Required	Select the check box if you want the user to complete fields in the parent table before completing this table.
Industry Standard Table	From the drop down list, select the appropriate Industry Standard table if the table you are creating uses NCCI or CS codes.
Allow Attachments	Select the check box if you want to allow attachments.
Tree Display	Select the check box if you want to display the new table in a tree view in relation with the parent table.
Line of Business Parent Required	Select the check box if you want the user to select a line of business before completing this table.

6. Select Save.

    RISKMASTER adds the table to the database .

To Import Code

1. From the main menu, select the Maintenance menu.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Table Maintenance.

   The Table Maintenance window opens and a Table Maintenance link displays under the Maintenance node display in the left navigation tree.

3. From the drop down list, select the table type.

4. Select the Import Codes button.

   The Codes Import window opens.

5. From the File field, select the Browse button.

   A Choose File window opens.

6. Select the code table file you want to import.

7. Select the Open button.

   On the Codes Import window, the File field displays the director and folder path of the selected code table file.

8. From the Code Type drop down list, select a code type, such as System Code Tables, or Industry Standard Codes, for the code you want to import.

9. Select Import.

   The codes display in the selected code table file.

Organization Hierarchy

Organization Hierarchy Overview

The Organization Hierarchy is a master list that contains information about your organizational structure. RISKMASTER's organizational hierarchy provides eight levels. The most typical RISKMASTER customer uses only four to five of these available levels. All the levels must have an entry; however, several levels will likely contain "placeholders" because they are not being used.

All events (accidents/incidents) and claims in RISKMASTER are attached to the organizational hierarchy at the lowest level of the structure. This lowest level, called "Department" in RISKMASTER, might represent physical sites (departments) in the organization. It might also represent cost centers. This lowest level should reflect the area of your company that owns or absorbs costs for accidents and claims.

The list displays the relationship of the sites with each other. The Organization Hierarchy shows the horizontal sub-divisions of sites in your organization, and enables you to track information such as coverages and the location of an event . Each entry on the hierarchy list is an entity. The Organization Hierarchy for your organization is automatically set up when RISKMASTER is installed for your organization.

The Organization Hierarchy lists the name of each site where your organization manages risk. RISKMASTER refers to a site as a "department." The Organization Hierarchy defines where each department fits within your organizational structure, by structuring your organization into a hierarchy with eight different levels. This structure helps you to identify patterns of risk. You can generate reports for any level in the hierarchy and also use the structure to manage policies. To manage policies, you have to create the Organization Hierarchy and then add exposure information to the departments. The eight levels of a hierarchy, from highest to lowest, are as follows:

- Client

- Company

- Operation

- Region

- Division

- Location

- Facility

- Department

The remaining levels of the organizational hierarchy shows the various sub-divisions of sites in your organization. Each operation is a subdivision of a company, and so forth. These allow you to roll up event and claim information and report by any of the levels you create in your organizational hierarchy. These levels are also used when tracking insurance coverages, as you select the pieces of the organizational hierarchy that any given insurance policy covers.

A hierarchy always has only one client, but it can have multiple entries at each lower level. The structure of your organization and how you want to track your risk experience determines whether you need to create single or multiple hierarchies.

CSC recommends the following tips to work with Organization Hierarchy:

- You can move an entity up or down the hierarchy.

- You cannot merge two entities.

- You must have information in all eight levels of the hierarchy, even if you do not use them.

- If you previously entered records in an Organization Hierarchy level, RISKMASTER updates all historical and future records when you change an entity in the Organization Hierarchy.

- To delete a hierarchical level, start at the lowest level of the Organization Hierarchy and then, work up the hierarchy tree.

- You can use same code abbreviations at different hierarchy levels, but not at the same hierarchy level.

Since most of the data in RISKMASTER is attached to the Department level, which is the lowest level you must first create each level down to the Department Level and enter demographic information at each level. CSC recommends pushing your structure to the bottom and using placeholders at higher levels when all eight levels will not be used.

In many cases this information is repeated across different levels of Org Hierarchy. Instead of entering all the information each time, RISKMASTER lets you clone levels by copying the information from a higher organizational level to lower levels of the Organizational Hierarchy.

Exposures and Organization Hierarchies Overview

After you create the organization hierarchy, RISKMASTER enables you to add exposure information to the organization hierarchy. You can easily modify the information at any time. Adding exposure information is optional, but doing so greatly enhances the benefits of RISKMASTER.

Exposure information helps determine the insurance policy coverage that you need for each entity.

You can use exposure information to calculate loss ratios throughout your organization based on many types of information. You can use only a few or all information types depending on what you record for each department. Examples of information types include the following:

- Number of employees

- Building floor space

- Revenues

- Payroll

Technically, each information type that you record is the "denominator". Claim data is the "numerator." For example, suppose that Department A has 100 employees and experiences five claims in one year and Department B has 50 employees and experiences five claims in the same period. Though the departments experienced the same number of claims, Department B's loss per employee ratio is twice as high because it has half as many employees.

RISKMASTER integrates the data with higher levels in the hierarchy.

For the greatest precision, enter exposure information for each department.

After adding exposure information to all departments, you can add the sum of all department information to the higher levels of the Organization Hierarchy by rolling up exposure information.

For example, each department in an organization has two employees. Departments A and B are subdivisions of facility 1 in the organization hierarchy. Departments C and D are subdivisions of Facility 2. Both facilities are subdivisions of Location 1. When you roll up the exposure information, each facility records four employees, and the location reports eight employees. In other words, the department information is rolled up to the higher levels. If you manually add exposure information to any higher levels of the hierarchy, RISKMASTER adds the values to the totals created by the roll up.

Tips

To Clone an Organization Level

RISKMASTER provides eight levels in the organization hierarchy . Usually, most of the data in RISKMASTER is attached to the Department level which is the lowest level. However, before you can enter data for a Department, you must first create each of the seven upper levels and enter data at each level.

In many cases, this data is repeated across different levels of the organization hierarchy. Instead of entering data for each level, RISKMASTER lets you copy data from a given level to lower levels of the organization hierarchy.

When you clone an upper level to create lower levels, you get lower levels with the same name and abbreviation (code) as the upper level and the demographic information (data) is also copied to the lower levels.

To Clone an Upper Organization Hierarchy Level

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Org. Hierarchy.
   The Org. Hierarchy window opens and an Org. Hierarchy link displays under Maintenance node in the navigation tree.

3. Navigate to the organization level you want to clone.

Note: you must first create a Client organizational level, before you can add lower levels.

4. With the organizational level to be cloned selected, in the Hierarchy Cloning -- From selected Level tab, do one of the following:

   - Select the Clone to Next Level option to copy the selected entry to the level immediately you selected.

   - Select the Clone Through option and then from the drop down list, select a lower level to copy the selected entry and associated subsequent levels entries below it through the level you selected from the drop down list.

5. Select the Clone button.
   The new entries are created below your selected entry and the Name, Abbreviation and associated demographic information is copied to the new entries.

Note: Since abbreviations must be unique in the RISKMASTER organizational hierarchy, no two entries in any given level can have the same. RISKMASTER inserts an Entity ID into Abbreviation field for the new entries cloned.

To Work with Organization Hierarchy

You can search for and use sites in the organization hierarchy.

To Select an Organization from the Organization Hierarchy

1. On any record window, from the appropriate field, select the 🔍 button.
   The Org. Hierarchy window opens.

2. Complete the fields on the Org. Hierarchy window , as shown below.

Organization hierarchy levels	From the tree structure, double click an organization level to display the sub-levels. In RISKMASTER there are 8 levels of hierarchy for each site or department. RISKMASTER names these levels as Client, Company, Operation, Region, Division, Location, Facility,and Department.
Filter by Effective Date	Select the check box to display only the organization levels with effective dates within the effective date range.
Search For Address	Select the check box if you want to search for a specific address.
Search Within Selected Branch	Select the check box if you want to use a site from within the branch that you have highlighted.
Default Expansion Level For List	From the drop down list, select the level in the organization hierarchy from which you want to select a site.
Hierarchy Cloning -- From Selected Level	
Clone to Next Level	Select the option to clone only the immediate level below the level you selected.
Clone Through Level	Select the option to clone from the level you selected.
Search Specific Level	From the drop down list, select the level to search in the organization hierarchy from the selected level.
String to Search	Enter a string that you want to use to search the required site.
Tree View	Select the button to display in a branch view the sites that best meet your search criteria. Double click the site that you want to use in the field.
List View	Select the button to list the sites that best meet your search criteria. Double click the site that you want to use in the field.
Reset	Select to clear the search fields.
City	Enter the city to search the required site.
State	Enter the state or select the button to open Code Selection window and select the state to search the required site.
Zip Code	Enter the Zip code you want to use to search the required site.

3. Highlight the organization and select the Use button.
    The field displays the organization hierarchy.

To Add a New Organization to the Organization Hierarchy

1. From the main menu, select Maintenance.

    The Maintenance menu opens.

2. From the Maintenance menu, choose Org Hierarchy.
    The Org. Hierarchy window opens and an Org Hierarchy link displays under Maintenance node in the navigation tree.

3. Navigate to the folder, such as Client, Company, Operation, Region, Division, Location, Facility, or a Department, to which you want to add a site.
4. To open, double click the folder.
5. Select the site to which you want to add the new sub-site.

6. From the toolbar, select the ☐ button.
    The appropriate window opens.

Note: For example, if you want to add a client to the organization hierarchy, the Client window opens. The fields on the windows for all departments are almost the same.

7. Complete the fields on the appropriate window.
8. Select the tab on the window and complete the required fields.

9. From the toolbar, select the Save button 💾.
    The new site displays in the Organization Hierarchy from the effective trigger date.

Tips

To Add Exposures to Organization Hierarchies

You can enter exposure information for each organization level.

1. From a Organization Level window, select the Exposure Information button.
    The Exposure Information window opens.

2. Complete the fields on the Exposure Information window , as shown below .

Exposure Start Dates/End Date	Enter the from and to dates for the date range during which you want to calculate exposure information.
Exposure Type	Displays the type of exposure.
No of Employees	Enter the number of employees that work at this site.
No of Work Hours	Enter the total number of hours all the employees at this site worked during the date range you specified.
Payroll Amount	Enter the total payroll amount for all the employees at this site during the date range you specified.
Asset Value	Enter the total value of the site's tangible assets.

Square Footage	Enter the total office floor space used by this site.
Vehicle Count	Enter the number of vehicles allocated to this site.
Total Revenue	Enter the site's total revenue.
Other Base	Enter whatever dollar measure you want.
RM Overhead	Enter the cost of using RISKMASTER during the date range.

3. From the toolbar, select the Save button .

Tips

To Add a Self Insured Jurisdiction

You can enter self-insured information for each organization level. CSC recommends that you enter self insured jurisdiction information at the highest possible level in the organization hierarchy.

1. From the main menu, select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose Org Hierarchy.
   The Org. Hierarchy window opens and an Org Hierarchy link displays under Maintenance node in the navigation tree.

3. From the Org. Hierarchy window, select the button.
   The Organization Hierarchy Maintenance window opens.

4. Select the Self Insured button.
   The Self Insured Info List window opens.

5. Select the button.
   The Self Insured Details window opens.

6. Complete the fields on the Self Insured Details window , as shown below.

5.

Jurisdiction	Select the search button to open the Code Selection window and select the jurisdiction.
Certificate Name	Enter the name of the certification or select the button to search for the certificate name.
Certificate Number	Enter the state- issued alphanumeric ID.
	The certificate number is called different names in different states. For example, in PA it is called the Bureau Code; in NY it is called the W-code, and so on.)

<table>
<tr><td>**Authorization Type**</td><td>Select the search button , to open the Code Selection window and select the code that describes your state's authorization type.</td></tr>
</table>

- Select **S- Statutory Self Insured**, if your state mandates that employers be self-insured.

- Select **L- Licensed Self Insured**, if you need to meet licensing requirements to be self-insured in your state.

<table>
<tr><td>**Organization Type**</td><td>Select the search button , to open the Code Selection window and select the code that describes whether your organization is an individual organization or part of a corporate group.</td></tr>
<tr><td>**Effective Date**</td><td>Enter the date from which the certificate number became effective.</td></tr>
<tr><td>**Expiration Date**</td><td>Enter the date after which the certificate number expires. If the certificate number is permanent, leave this field blank.</td></tr>
<tr><td>**OK**</td><td>Select to save the record.</td></tr>
<tr><td>**Cancel**</td><td>Select to close the Self Insured Details window.</td></tr>
</table>

6.

7. From the toolbar, select the Save button .

Summaries

Executive Summaries Overview

You can generate executive summaries in RISKMASTER that contain details about claim information, financial data, diaries, and notes. You can customize the executive summary to contain only the information you choose. An executive summary is useful when you want to create a snapshot of printable information, for example, you can configure an executive summary report to display specific information for claim analysis.

To Configure an Executive Summary

You can generate an executive summary that contains claim information, financial data, diaries, and notes. You can set up your executive summary to contain only the information you choose.

To configure an executive summary

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Exec. Summaries.
   The Exec. Summaries menu opens.

3. From the Exec. Summaries menu, choose Configurations.
   The Executive Summary Configuration window opens and a Configurations link displays under the Reports node in the left navigation tree.

4. On each tab, select the check boxes for the information that you want to include in your executive summary.
   Note: The more information you include, the longer the summary will take to run.

5. Select the Save Configuration button.

To configure an executive summary for users

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose UI Admin.
   The UI Admin menu opens.

3. From the UI Admin menu, choose Admin Exec Summaries Config.
   The Executive Summary Configuration window opens.

4. From the Available Users field, select the user that you want to configure to view the executive summary.
5. Select Add.
   The user(s) that you select displays in the Users to be Configured field.

6. To remove the user from the Users to be Configured field, select the ✖ button.

To Get a Quick Summary

You can generate quick summaries and executive summaries In RISKMASTER. Use a quick summary to review details about events and claims on a single window. You can configure an executive summary to contain details about claims, financials, diaries, and notes. However, you cannot change the configuration of a quick summary.

To Get a Quick Summary

1. Search for the claim or event for which you want to generate a quick summary.

2. From the RISKMASTER toolbar, select the Quick Summary button .
    The Quick Summary window opens.

3. From the left tab, select the item for which you want to view details.
    For example, under Event select Diaries to display the diaries associated with that event. The right frame displays the details.

To View an Executive Summary

You can generate quick summaries and executive summaries in RISKMASTER. An executive summary can contain details about claim information, financial data, diaries, and notes. You can set up your executive summary to contain only the information you choose.

To Generate an Executive Summary

1. From the main menu, select Reports.
    The Reports menu opens.

2. From the Reports menu, choose Exec Summary.
    The Executive Summary menu opens.

3. Do one of the following:

    *   From the Executive Summary menu, select Claim to open the Claim Search window.

    *   From the Executive Summary menu, select Events to open the Event Search window.

4. On the Claim or Event Search window, enter search criteria in the fields to search for the claim or event you want to generate the executive summary for.
5. Select Submit Query.
    The executive summary opens in Adobe Acrobat

Administrative Tracking

Administrative Tracking Overview

You can customize Administrative Tracking tables to contain fields specific to your organization. You can use Administrative Tracking tables in RISKMASTER to enter and track all types of data.

RISKMASTER has eight (8) administrative tracking templates , which you can use in the default format, or change to suit your organizational needs:

Template	Description
Bond Abstract	Use to enter and track all the details associated with a common bond abstract. For example, your organization can maintain employee fidelity bonds or performance bonds. You can record the type and line of each bond, the effective and expiration dates, premium and dollar amounts, and the name and address information for each party involved. You may add additional for comments, status, and payment information.
Certificate Tracking	Use to monitor insurance policies for your organization. For example, your organization can track certificates for employee health benefits, workers' compensation, liability coverage, and company vehicles and other assets. You can enter and maintain information about the insuring agency, the insured party, and policy details such as aggregate information, the policy number, and expiration date.
Complaint Management	Use to set up a system for recording, analyzing, and following up on complaints from clients, outside agencies, suppliers, or employees. You can enter and track the type of complaint, the date and source of the complaint, any action that is requested, the reason for the complaint, and whether the complaint is being referred to another party.
Contract Management	Use to keep track of nondisclosure and personal property contracts, or contracts with suppliers and leasing or facilities agencies. You can maintain and review details about the effective, expiration, and renewal dates, the type of contract, indemnity and warranty information, and numerous other details to help you manage contracts for your organization.
Directory	Use to enter and update lists of contacts, outside resources or suppliers, and professional or industry-related organizations. The directory provides fields for the names of both individuals and organizations, complete address, phone and fax numbers, and notes.
Hazardous Materials	Use to create records for hazardous materials, and cross-reference product names to generic and industry names. You can keep notes on each item for reporting, government or agency requirements, and future reference.
Project Tracking	Use to enter and monitor the type of activity, estimated and actual hours, and the project status of internal projects. You can keep track of the materials and costs, due dates, review dates, and completion dates. You can also assign projects to individuals or groups, and enter notes for reference or reminders.
Property Management	Use to enter location and ownership information, current, replacement, and original values for the property and the contents, and details associated with coverage, damages, and improvements.

You can also create new Administrative Tracking tables to meet the requirements of your organization. Each table is structured with a range of the common fields associated with the topic, and a primary index for sorting records added to the table.

Your system administrator is responsible for setting up the fields in the administrative tables.

For a description of the fields on the administrative tables, see your system administrator.

You can use these Administrative Tracking tables as they are, change these tables to suit your organizational needs, or create new tables.

To Use Administrative Tracking Tables

You can enter information into Administrative Tracking tables.

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Admin Tracking.

   The Administrative Tracking list opens and an Admin Tracking link displays under Maintenance in the navigation tree.

3. Select the table you want to open.

   The appropriate Administrative Tracking window opens.

4. To enter a new record, from the toolbar, select the New button .

5. Complete the fields on the Administrative Tracking window , as shown below .

Record ID	Enter a unique identifying number for the record you are creating. If you leave this field blank, RISKMASTER will generate a number for the record.
	To open an existing record, enter the Record ID and then select the Go button to open the record.
Go	Select to open the record associated with the Record ID you entered in the Record ID field.
Custom fields	Your organization sets up these fields. Enter information in the fields, as required.
Admin Tracking Table List	Select the button to open the Administrative Tracking list.

6. Note: You can customize the Administrative Tracking tables according to the needs of your organization. The fields on the window can differ from one organization to another. For a description of the fields on the administrative tables, see your system administrator.

7. From the toolbar, select the Save button .

   RISKMASTER saves the record you enter.

SSO

Single Sign On

Prerequisites

SSO Security Server

The SSO Security Server application requires a Java Web server with a Java Development Kit (JDK) of at least 1.4.

The SSO Security Server application has been tested with the following Java Web servers:

20. WebSphere 5.1

21. WebSphere 6.1

22. Tomcat 4.1.31

23. Tomcat 5.5.9

24. Tomcat 6.0.10

SSO Java-Based Web Applications

Applications that have a Java-based Web interface are protected by a Java filter. The filter requires a Java Web server that supports Servlet Specification 2.3 for Servlet filters.

The SSO Java filter has been tested with the following Java Web servers:

25. WebSphere 5.1

26. WebSphere 6.1

27. Tomcat 4.1.31

28. Tomcat 5.5.9

29. Tomcat 6.0.10

IIS 5.0 Web Applications

Applications that have a Microsoft language Web interface using Internet Information Services 5.0 (IIS) are protected by an Internet Server Application Programming Interface (ISAPI) Filter. The filter requires MSXML 4.0 Service Pack 1 (Microsoft XML Core Services) or later. MSXML 4.0 does not replace MSXML 3.0, so it should not cause any problems with other installed applications.

The ISAPI filter has been tested with IIS 5.0 executing on a Windows 2000 server.

IIS 6.0 Web Applications

Applications that have a Microsoft language Web interface using IIS 6.0 are protected by an HTTPModule. The HTTPModule executes in a .NET Framework 1.1 environment.

The HTTPModule has been tested with IIS 6.0 executing on a Windows 2003 server.

Basic Steps

The procedure you need to follow depends on your installation type—automated or manual.

Automated Installation

Your application may have provided an automated installation program for Single Sign-On (SSO). The automated installation involves the following steps:

30.   Run the installation program to install the SSO Security Server application in a Java Application server. The wizard will guide you through the steps, asking you to provide information such as the Authentication Security domain (Active Directory information in the base release) and IP address.

31.   Run the installation program to install the SSO Filters in each Web server that requires SSO protection. The installation program will ask you the URL of the SSO Security Server and will install the filters that are applicable to your application. Filters are available for the following platforms:

32.   For IIS 5.0, the ISAPI Filter.

33.   For IIS 6.0, the HTTPModule Filter.

34.   For Java Web applications, the Java Filter.

35.   Create and propagate the SSO Certificate from the SSO Security Server to each Web server that requires SSO protection.

36.   This can be skipped for test systems by turning off Secure Socket Layer (SSL) in the configuration files.

Manual Installation

Installing SSO manually involves the following steps:

37.   Install the SSO Security Server application in a Java Application Server using the supplied ear or war file (usually sso.war).

38.   Update the SSO Security Server configuration files for the uniform resource locators (URL) and Authentication Security domain (Active Directory information in the base release).

39.   Install the SSO Filters in each Web server that requires SSO protection.

40.   For IIS 5.0, the ISAPI Filter is delivered in the ISAPIFilter directory

41.   For IIS 6.0, the HTTPModule Filter is delivered in the NETFilter directory.

42.   For Java Web applications, the Java Filter is delivered in the ssofilter.jar file in the JavaFilter directory.

43.   Update the SSO Filter configuration files in each Web server for the URLs to reference the SSO Security Server application.

44.   Create and propagate the SSO Certificate from the SSO Security Server to each Web server that requires SSO protection.

This can be skipped for test systems by turning off SSL in the configuration files

Leave Management

Leave Management Overview

You can track Medical Leave of Absence (MLOA) and leaves that employees can avail in compliance to the Family Medical Leave Act (FMLA), for Non-occupational claims.

The Leave Management module allows you to:

- Set up and manage one or more leave plans

- Track leave availability and eligibility based on employee hours worked in the past and leaves already taken

- View the leave history for an employee

The Family and Medical Leave Act (FMLA)

The Family and Medical Leave Act (FMLA) requires all covered employers to provide up to 12 weeks of unpaid, job-protected leave to their employees, per year. FMLA also requires that the employer maintains group health benefits during the employee's leave period.

Under FMLA, an employee is entitled to take leave for the following reasons:

- Birth and care of the eligible employee's child, or placement for adoption or foster care of a child with the employee

- Care of an immediate family member (spouse, child, parent) who has a serious health condition

- Care of the employee's own serious health condition

FMLA benefits are available to families where at least one family member works at a location in the United States, or in any territory or possession of the United States, and is employed by:

- A public agency, including those at the local, state, and federal level and schools. In some instances, special rules may apply to school employees.

- An employer who has at least 50 employees who are contracted to work for a minimum of 20 work weeks in the current or preceding calendar year.

Tips

To Set Up a Leave Plan

1. From the main menu, select Maintenance.
    The Maintenance menu opens.

2. From the Maintenance menu, choose the Leave Plan Management.
    The Leave Plan Management window opens and a Leave Plan Management link displays in the navigation tree.

3. Select and complete the fields on the Plan Information tab, as shown below.

4.

Plan Code	Enter a short code for the leave plan.
Plan Name	Enter a name for the plan.
Plan Type	Enter the code that best describes the plan type or select the [ ] button to select from the Code Selection window.
Plan Description	Enter a short description of the plan.
Default Plan for All Employees	Select the check box to apply the leave plan to all employees.
Leave Plan Available To	Enter the level in your organization hierarchy to which the leave plan is available, or select the [ ] to select from the Org. Hierarchy.
Plan Status	Enter the code that best describes the plan status or select the [ ] button to select from the Code Selection window.
Effective Date	Enter the date on which you want to make the plan effective or select the button to select from the calendar.
Expiration Date	Enter the date on which you want the plan to expire or select the button to select from the calendar.
Issue Date	Enter the date of issue of the plan or select the [ ] button to select from the Code Selection window.
Review Date	Enter the date of review of the plan or select the [ ] button to select from the Code Selection window.
Renewal Date	Enter the date of plan renewal or select the [ ] button to select from the Code Selection window.

Cancel Date
Enter the date of plan cancellation or select the [🔍] button to select from the Code Selection window.

Default Hours Per Week
Enter the number of hours the employee has to work in a week.

Allowed
Enter the number of leaves that the employee can avail.

Allowed Period Type
Enter the time period in which the leave is allowed, or select the [🔍] button to select from the Code Selection window.

Per
Enter the time frame duration with which the employee can avail the allowed number of leaves.

Per Period Type
Enter the time frame unit , or select the [🔍] button to select from the Code Selection window.

5.   Select and complete the fields on the Eligibility & Update tab, as shown below.

Eligibility

Must Have Worked Hours in Timeframe
Enter the required number of hours an employee has to work in a time frame, to become eligible to avail leave.

Eligible for Leave .... Days from Date Hired
Enter the number and time period, for example 6 months, from the date of hire, when the employee becomes eligible to avail leave.

First of Next Month
Select the check box if you want to make the employee eligible for leave from the first of next month.

Limit by Claim Status for Leave Records Updates	Enter the claim status based on which you want to limit leave records updates, or select the 🔍 button to select from the Code Selection window.
Limit by Leave Status	Enter the leave status based on which you want to limit leave records updates, or select the 🔍 button to select from the Code Selection window.
Limit by Claim Status for Leave History Updates	Enter the claim status based on which you want to limit leave history updates, or select the 🔍 button to select from the Code Selection window.
Limit by Leave Status for Leave History Updates	Enter the leave status based on which you want to limit leave history updates, or select the 🔍 button to select from the Code Selection window.
Use Existing Leaves to Update Leave History	Select the check box to update the leave history table for the plan using existing leaves when you run an update.

6. If your organization defined Supplemental data, complete the Supplementals tab.

7. From the toolbar, select the Save button 💾.

FAS

Fraud Analytics Suite Overview

Using the Fraud Analytics Suite feature you can access the FAS system from within RISKMASTER and send claim and other information to conduct fraud searches.

Fraud Analytics Suite (FAS) combines predictive data modeling technology, identity search technologies, fraud indicator business rules, company claims information and industry data sources to identify and mark suspicious claims as early as the first notice of loss.

 It allows to

- Detect fraud early

- Identify the right claims to focus on

- Automate time-consuming processes

- Streamline workflow

- Quickly identify suspicious participants or patterns in claims.

In RISKMASTER the FAS interface sends claim data to FAS using ACORD XML format. The FAS system then generates a batch report to specify that the claims sent by RISKMASTER were accepted by the system.

 Users having the permissions to access the FAS system set in the Security Management System can only view and access the FAS weblink. This feature is available when the 'Use Fraud Analytics Suite(FAS)' check box is selected on the General System Parameter Setup window.

To Set Up FAS Permissions

To grant permission to a user or module security group to access FAS, on the Security Management System window, under the Module Access Permissions node for a particular user or group, select the Fraud Analytics Suite checkbox.

To Access FAS

On the RISKMASTER application window, select the FAS weblink next to the Datasource field.
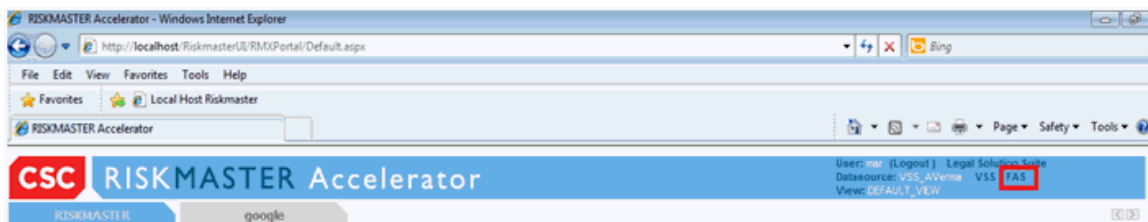
To Mark Supplemental Fields for FAS Reporting

1. From the main menu, select Utilities> UI Admin> Supplemental Setup> Supplemental Field Data
   The Supplemental Data window opens.
2. Select the option for a table and then select the Edit button.
   The Table Supplemental window opens.
3. Select the option for the field you want to mark as FAS reportable,
4. Select the [button image] button.
   The <tablename, field> window opens.
5. Select the FAS Reportable check box to mark the field for FAS reporting.
6. To Mark All the Fields in Table as FAS Reportable

7. On the Table Supplemental window, select the Mark all Fields as FAS Reportable, to mark all the supplemental fields in the table for FAS reporting.
8. When you select this checkbox, all the fields will be added to the ACORD XML file and sent to FAS.

Work with FAS Settings

1. On the General System Parameter Setup window: System Settings tab, select the Use Fraud Analytics Suite(FAS) check box to activate the FAS feature.

    When this check box is selected then every claim that is added or updated in RISKMASTER is sent to FAS.

    The following fields display when the 'Use Fraud Analytics Suite(FAS) checkbox is selected.
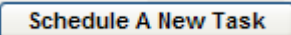
None	This option is selected by default. When this option is selected then the ACORD XML is stored in the **"Riskmaster\UI\riskmaster\userdata"** folder. You have to select/ access the file manually from this location.
FTP	When this option is selected the ACORD file will be placed on the FTP location specified in the FAS section. The same file will be placed in the **"Riskmaster\UI\riskmaster\userdata"** folder as well.
FAS Server	Enter the name of the FAS server.
FAS User ID	Enter the user ID to access FAS.
FAS Password	Enter password to access FAS
FAS Folder	Enter the file path where the ACORD XML file is placed.
Shared	If this option is selected then ACORD xml will be placed on the shared location as specified in the FAS Shared Location field. Same file will be placed in the **"Riskmaster\UI\riskmaster\userdata"** folder as well
FAS Shared Location	Enter the path of the shared location where the ACORD XML file is placed.

Note: In case an error occurs or there is a discrepancy in the FTP or shared location file upload, the process is not rolled back and the log is updated with the details of the file in the **"Riskmaster\UI\riskmaster\userdata"** folder.

To Enable Fraud Analytics Suite

1. From the main menu, select Utilities
2. From the Utilities menu, select System Parameters
3. From the System Parameters menu, select General System Parameter Setup

    The General System Parameter Setup window opens
4. On the General System Parameter Setup window: System Settings tab, select the Use Fraud Analytics Suite(FAS) check box to activate the FAS feature.

    When this check box is selected then every claim that is added or updated in RISKMASTER is sent to FAS.
5. Select the Save button.

To Schedule FAS Task in Task Manager

1. From the View Scheduled Tasks window, select the [Schedule A New Task] button.

    The View Scheduled Task window opens.

2. From the Task Type drop down list, select the type of task as Fraud Analytics Scheduler.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as required.
5. Enter the date, time and other schedule parameters
6. In the FAS Scheduler Parameters section complete the fields as shown in the table below

Available Claim Status(es)	This field displays the available claim statuses available to be reported to FAS.
Related Claim Status(es)	From the Available Claim Statuses field select the claim status codes based on which you want claim records to be reported to FAS.
Available Claim Types	This field displays the available claim types available to be reported to FAS.
Related Claim Type(es)	From the Available Claim Type field select the claim type codes based on which you want to claim records to be reported to FAS.
Date of Claim	Select the From and To date of claim range within which you want to filter claims for reporting to FAS.
Date of Claim Upload	Select the From and To date of claim upload range within which you want to filter claim records for reporting to FAS.

7. Note: On the Schedule a Task window, in the FAS Scheduler Parameters section, the FAS parameters are displayed based on the options selected on the General System Parameter Setup window: System Settings tab, FAS Scheduler Parameters section.
8. Select the Save button.

Enhanced Notes

Enhanced Notes Overview

Use the Enhanced Notes feature to add notes to claims and events. Enhanced notes enable you to govern data handling and manage tasks related to claims and events. You can sort enhanced notes by adjuster, date, user type and note type and can maintain the sorted order of enhanced notes for that particular user when ever user opens the Advanced Search window.

While viewing existing enhanced notes, you can re-order column headers, print notes by note type, and create enhanced notes templates. You can also restrict editing rights to the user who creates a note and you can specify a time frame within which a note can be edited.

You must enter a Note Type code to create and complete an enhanced note. To create a new note or view notes related to an event or claim, search for the event or the claim you want to associate the note with and then open the Enhanced Notes window.

To Create an Enhanced Note

1. Search for the claim or event you want to attach enhanced notes to.

   The event opens in the event window or the claim opens in a Claim window.

2. From the toolbar, select the Enhanced Notes button .

   The Enhanced Notes window opens.

3. On the Enhanced Notes window, select the Create Note button.

   The Create Notes window opens.

4. Complete the fields on the Create Notes window, as shown below.

   Note Type

   Enter the code that best describes the note type or select the button to select from the Code Selection window.

   If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note. You have to select a note type to complete a enhanced note.

   You can change the Note Type for an enhanced note. If the note type is that of a system generated note, you cannot change the note type.

   Activity Date

   Enter a date for creation of the enhanced note. By default, the Activity Date is the current system date.

   Note Attached To

   Select a claim or the event to which you want to attach the note to. If a note applies to all claims related to an event, do not associate it with an individual claim..

   when you choose to create an enhanced note at the claimant level, this field displays claimants attached to a claim along with the event, its associated claim(s) and other claimants associated with other claims on an event.

   nhanced notes at the claimant level are only displayed when the required permissions are set in the Security Management System.

   Cancel

   Select the button to close the window without saving your changes.

Back To Notes	Select to return back to open the Enhanced Notes window.
Template	Select the ellipses button to open the Enhanced Notes Templates window and select a template for enhanced notes.
Create Another Note	Select the button to create a new note for the claim without closing the window and navigating back to the Enhanced Notes window.

> You must save the previous comment before trying to create a new note. When you select the 'Create Another Note' button the contents of the previous note are cleared. If try to create a new note without saving the existing note open in the window, an error message is displayed.

5. Select Save.

    RISKMASTER adds the note to the list of notes in the Enhanced Notes window.

To Search for an Enhanced Note

1. On the Enhanced Notes window, select the Advanced Search button.

    The Advanced Search window opens.

2. Complete the fields on the Advanced Search window , as shown below .

1.

Event Number	Displays the number of the event to which the list of notes is attached.
Claim(s)	Select the button to open the Claim Selection window, and select the claim for which you want to view the enhanced note.
User Type(s)	Select the button to open the Code Selection window and select the user type who has access to the enhanced notes.

> **There is a user type for each security group. When you add a user to a group, the user inherits the user type code for that group.**

Entered By	Select the button to open the Code Selection window and select the system user who entered the enhanced notes.
Note Type(s)	Enter the code that best describes the note type or select the button to select from the Code Selection window.
Claimant	Select Claimant option to open the Claim Selection window, and select the claimant for whom you want to view the enhanced note.
Activity From Date	Select the start date from which you want to view the enhanced notes.

Activity To Date	Select the end date till which you want to view the enhanced notes.
Notes Text contains	Enter the text you want to search for in the Note Text field in the notes list.
Sort By	From the drop down list, select the criteria you want to use to sort the notes list in order of importance. Begin with the most important criteria on the left, followed by the second most important and so on. You can sort the list by:

- **Entered By:** Name of the user who entered the note.

- **Note Type:** The type of note (Supervisor, System and so on.)

  Note: If the note type is of confidential, then only entering user and user's supervisor can view note.

- **Activity Date:** A date range for the creation of the note.

- **User Type:** A code defined for each security group and inherited by a user added to that group.

The sorted order of notes list is maintained for that particular user when ever user opens the window.

Return	Select the button to view the enhanced notes list.
Cancel	Select the button to return to the Enhanced Notes window without saving the changes made to the Advanced Search window.

2.

3.   To display the results of your search, select the Return button.

The Advanced Search Results window opens.

4.   Complete the fields on the Advanced Search Results window as shown below .

Activity Date	Displays the date of creation of the Enhanced note.
Attached To	Displays the event or the claim number to which the note is attached to. If you have an event window open, the Enhanced Notes window displays notes associated with all the claims related to that event. If you have a Claim window open, the window displays notes associated with that claim only.
Note Type	Displays the note type code and description selected from the Note Type Codes List. If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note.

You can change the Note Type for a enhanced note. If the note type is that of a system generated note, you cannot change the note type.

Note Text	Displays the note text entered while creating the enhanced note.
Entered By	Displays the name of the user who entered the enhanced note.
Activity Date	Displays the date of creation of the enhanced note.

Date Created	Displays the date of creation of the enhanced note.
Time Created	Displays the time of creation of the enhanced note.
Entered By	Displays the name of the user who entered the enhanced note.
User Type	Displays the users who are allowed access to the enhanced note.
Attached To	Displays the event or the claim number to which the note is attached to. If you have an event window open, the Enhanced Notes window displays notes associated with all the claims related to that event. If you have a Claim window open, the window displays notes associated with that claim only.
Edit Note	Select the button to edit an existing enhanced note.
Print Notes	Select the button to display all the notes in a Print Preview window. On the Print Preview window, select the print button to get a printed copy of all the notes.
Delete Note	Select a note and then select this button to delete the selected enhanced note
Print Selected Note	Select a note and then select this button to display the selected note in a Print Preview window.
View All Notes	Select the button to display all the enhanced notes in ascending order.
Cancel	Select the button to close the window without saving your changes.
Back To All Notes	Select the button to return to the Enhanced Notes window.

To Create Enhanced Notes Templates

1. Search for the claim or event you want to attach an enhanced note to.
   The event opens in the event window or the claim opens in a Claim window.

2. From the toolbar, select the Enhanced Notes button .
   The Enhanced Notes window opens.

3. On the Enhanced Notes window, select the Templates button.
   The Templates window opens.

4. On the Templates window, select the Create Template button.
   The Templates window opens.

5. On the Templates window, select the Create Template button.
   The Create Template window opens

6. In the Template Name field, enter the name of the template.

7. Create the template as required and then from the formatting toolbar, select the button to save the template.

The template you created is saved. You can edit or delete this template from the Templates window. The next time you create an enhanced note using the Enhanced Notes window you can select the template you created from the Template field and apply it to your enhanced note.

Enhanced Notes Window

Use the Enhanced Notes window to see notes attached to an **event** or a claim . You can view the **enhanced notes** in the upper frame of the window with the most recent note being the first. You can re-order the columns on the Enhanced Notes window by simply dragging and dropping a column header to change the position of the column.

You can select the Create New button to enter new claim notes. You can also modify the list of notes available by selecting the advanced search button. Select a note from the upper frame to display more details about the note in the two fields below.

To open
- Search for the claim or event you want to attach an enhanced note to.

- The event opens in the event window or the claim opens in a Claim window.

- From the toolbar, select the Enhanced Notes button .

- The Claim Enhanced Notes window opens.

Toolbar Buttons

Advanced Search   Select the button to open the Advanced Search window.

Create Note   Select the button to create a new enhanced note for a claim or an event.

Edit Note   Select the button to edit an existing enhanced note.

Note Attachment   Displays the note text entered while creating the enhanced note.

Delete Note   Select a note and then select this button to delete the selected enhanced note..

View All Notes   Select the button to display all the enhanced notes in ascending order.

Templates   Select the button to open the Enhanced Notes Templates window and select a template to use for enhanced notes.

 Print
Notes

Select the button to display the notes in a Print Preview window. You can select any one of the following:

- **Print Selected Note :** Select a note and then select this option to display the selected note in a Print Preview window.

- **Print All Notes:** Select the option to display all the notes in a Print Preview window.

- **Print Notes by Note Type:** Select the option to display the notes by selected note type in the Print Preview window.

Note: You need to select a Note Type before selecting the Print Notes button.

Field definitions

Activity Date   Displays the date of creation of the Enhanced note.

Attached To   Displays the event or the claim number to which the note is attached to. If you have an event window open, the Enhanced Notes window displays notes associated with all the claims related to that event. If you have a Claim window open, the window displays notes associated with that claim only.

Notes Type   Displays the note type code and description selected from the Note Type Codes List. If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note.

Note: **You can change the Note Type for a enhanced note. If the note type is that of a system generated note, you cannot change the note type.**

Notes Level   Select the event, claim or claimant level at which you want to filter the enhanced notes records.

User Type   Displays the users who are allowed access to the enhanced note.

Note Text   Displays the note text entered while creating the enhanced note.

Entered By   Displays the name of the user who entered the enhanced note.

Date/Time Created   Displays the date/Time of creation of the enhanced note.

Important   Displays whether the Enhanced Notes is important or not.

Subject   Displays the information describing the content of the note. It is an optional field and is used only for display.

Templates Window

- Search for the claim or event you want to attach an enhanced note to.

- The event opens in the event window or the claim opens in a Claim window.

To open

- From the toolbar, select the Enhanced Notes button .

- On the Enhanced Notes window, select the Templates button.

Field definitions

Template Name   Displays the name of the template.

Entered By   Displays the name of the user who created the template.

 Create Template   Select the button to open a window that lets you create a new enhanced notes template.

 Edit Template   Select an existing template and then select the button to open a window that lets you edit the template.

 Delete Template   Select an existing template and then select the button to delete the template.

 Back to Notes   Select the button to close the window.

Enhanced Notes Entry Window

Use the Enhanced Notes Entry window to create enhanced notes attached to an **event** or a claim . You can format the note text by selecting different format options.

To open   From the Enhanced Notes window, select the Create Note button.

Field definitions

Note Type

Enter the code that best describes the note type or select the button to select from the Code Selection window.

If you select a confidential note type, only the current adjuster and the current adjuster's supervisor can view the note. You have to select a note type to complete a enhanced note.

> Note: **You can change the Note Type for an enhanced note. If the note type is that of a system generated note, you cannot change the note type.**

Activity Date   Enter a date for creation of the enhanced note. By default, the Activity Date is the current system date.

Note Attached To   Select a claim or the event to which you want to attach the note to. If a note applies to all claims related to an event, do not associate it with an individual claim.

> Note **when you choose to create an enhanced note at the claimant level, this field displays claimants attached to a claim along with the event, its associated claim(s) and other claimants associated with other claims on an event.**
>
> **The enhanced notes at the claimant level are only displayed when the required permissions are set in the Security Management System.**

Template(s)   Select the ellipses button to open the Enhanced Notes Templates window and select a template for enhanced notes.

Cancel   Select the button to close the window without saving your changes.

Create Another Note	Select the button to create a new note for the same claim without closing out of the window.
	Note: You must save the previous comment before trying to create a new note. When you select the 'Create Another Note' button the contents of the previous note are cleared. If try to create a new note without saving the existing note open in the window, an error message is displayed.
Subject	Enter the information describing the content of the note. It is an optional field and is used only for display.
Back To Notes	Select to return back to open the Enhanced Notes window.

Advanced Search Window

Use the Enhanced Notes Search window to modify the list of notes available for viewing. The list is limited to the notes attached to the Event associated with the current claim , and whether or not the note type is a confidential note type.

To open	From the Enhanced Notes window, select the Advanced Search button.

Field definitions

Event Number	Displays the number of the event to which the list of notes is attached.
Claim(s)	Select Claim option to open the Claim Selection window, and select the claim for which you want to view the enhanced note.
User Type(s)	Select the [🔍] button to open the Code Selection window and select the user type who has access to the enhanced notes.
	Note: **There is a user type for each security group. When you add a user to a group, the user inherits the user type code for that group.**
Entered By	Select the [🔍] button to open the Code Selection window and select the system user who entered the enhanced notes.
Claimant	Select Claimant option to open the Claim Selection window, and select the claimant for whom you want to view the enhanced note.
Note Type(s)	Enter the code that best describes the note type or select the [🔍] button to select from the Code Selection window.
Activity From Date	Select [📅] button to select the start date from which you want to view the enhanced notes.
Activity To Date	Select [📅] button to select the end date till which you want to view the enhanced notes.
Notes Text contains	Enter the text you want to search for in the Note Text field in the notes list.

Sort By	From the drop down list, select the criteria you want to use to sort the notes list in order of importance. Begin with the most important criteria on the left, followed by the second most important and so on. You can sort the list by:

- **Entered By:** Name of the user who entered the note.

- **Note Type:** The type of note (Supervisor, System and so on.)

- Note: If the note type is of type confidential, then only the entering user and the entering user's supervisor can view the note.

- **Activity Date:** A date range for the creation of the note.

- **User Type:** A code defined for each security group and inherited by a user added to that group.

  Note: The sorted order of notes list is maintained for that particular user when ever user opens the window.

Subject	Enter the text you want to search for in the Subject field in the notes list.
Important	Displays whether the Enhanced Notes is important or not.
Return	Select the button to view the enhanced notes list.
Cancel	Select the button to close the window.

Database Maintenance

Address Maintenance

1. From the main menu, select Maintenance> Address.
2. The Address Maintenance window opens.
3. On the Address Maintenance window complete the fields as shown in table below.

Address1	Enter the address details.
Address2	Enter the address details.
City	Enter the city.
State	Enter the state or select the 🔍 button to select from the code selection window.
Country	Enter the country or select the 🔍 button to select from the code selection window.
County	Enter the county.
Zip/Postal Code	Enter the zip/postal code.
OK	Select to save information on the Addresses window.
Cancel	Select to close the window without saving the record.

Database Maintenance Overview

In RISKMASTER , you can enter and maintain information about employees, other people, vehicles and entities independent of claims and events. You can then retrieve this information from events, claims, policies and other windows as you create these records.

You can enter entities into the database under three categories, namely, object entities, people entities and place entities (which are entered into the organizational hierarchy). You can add, modify or delete these entities as necessary.

Disability Plan Management

Disability Plan Maintenance Overview

Use RISKMASTER to manage non-occupational disability plans for claim payment, renewal organization, reporting, and quick online reference.

Plan management in RISKMASTER offers the following benefits:

- Application of payments to the appropriate non-occupational disability plans.

- Timely notification of approaching coverage exhaustion and renewal dates.

- Intelligent selection of appropriate coverages.

- Trend analysis of non-occupational disability plans-claims experience.

- Complete integration with all claims databases.

- User-defined reporting.

- Automated production of cancellation notices.

In case of a future disability claim, it is these rules which will decide the eligibility/amount of disability benefits employee would receive

LTD and STD modules are an enhancement to the RISKMASTER

product intended for tracking/supporting claims for cases where employee

injury results in long term disability/short term disability.

To Add a Non-Occupational Disability Plan

1. From the main menu, select Maintenance.
    The Maintenance menu opens.

2. From the Maintenance menu, choose Plan Management.
    The Non-occupational disability plan administration window opens and a Plan Management link displays under Maintenance node in the navigation tree.

3. Complete the fields in the Non-occupational disability plan administration window: Plan Information tab , as shown below .

2.

Plan Number/Code	Enter a unique number for the plan.
Plan Name	Enter a unique name that describes the plan.
Plan Description	Enter a description for the plan.
Insured (s)/Account(s)	Select the ⋯ button to open the Org. Hierarchy window and select the organizational levels that you want the plan to cover.

> To remove an existing record from the Insured(s)/Account(s) field, select the record and select ➡ .

Plan Status	Enter the code that best describes the status of the plan or select the 🔍 button to select from a Codes Selection window.
Premium	Enter the dollar amount you pay for the plan.
Bank Account	From the drop down list, select the sub bank account from which you want to make payments for this plan.
Pay Period Start Date	From the drop down list, select the first day of any pay period or select the button to select the date from the calendar.
Effective Date	Enter the date on which the plan becomes effective or select the button to select from the calendar.
Expiration Date	Enter the date on which the plan expires or select the button to select from the calendar.
Issue Date	Enter the date on which the plan was issued or select the button to select from the calendar.
Review Date	Enter the date on which you will review the plan to decide whether or not to renew the plan or select the button to select from the calendar.
Renewal Date	Enter the date on which you want to renew the plan or select the button to select from the calendar.
Cancel Date	Enter the date on which you cancelled the plan or select the button to select from the calendar.

Preferred Day of Week for Payments	Enter the preferred day of the week on which you want to make payments or select the 🔍 button to select from Code Selection window.

> The actual day on which RISKMASTER makes payments is based on the following:

- The day you select in the Preferred Day of Week for Payments

- The payment schedule you select

- The last day of the pay period

- Whether or not you select the Checks Print Before End of Pay Period option.

Preferred Payment Schedule	From the drop down list, select whether you want to make payments at weekly, biweekly or monthly intervals.
Preferred Monthly Day	From the drop down list, select the preferred day of the month when you want to make payments.

> This field activates only when you select to make payments on monthly intervals.

Check Prints Before End of Pay Period	Select the check box if you want to print checks before the pay period ends.

For example, if the pay period ends on a Thursday but your Preferred Day of Week for Payments is Tuesday, then:

- Select the check box to print the check on Tuesday for the pay period through Thursday.

- Do not select the check box to print the check on the Tuesday after the pay period.

Plan Classes	Select to open the Plan Classes window .

3.

4.   Select the Plan Classes button.

The Plan Classes window opens.

5.   Complete fields on the Class Name/Description tab .

Plan Classes

Class Name/Description | Eligibility/Waiting Period | Benefit Calculation | Benefit Limits/Check Options/Offsets

Class Name   8888   Class Description   78474

Class Name	Displays the class name.
Class Description	Displays the class description.

Eligible for Benefits	From the drop down list, select days, weeks or months, and then enter the number of days, weeks or months from date of hire, after which the employee becomes eligible for benefits.
Waiting Period from Disability Date	Enter the waiting period from the disability date after which the employee becomes eligible for benefits.

> Note: RISKMASTER calculates the Benefits Start Date on the Non Occupational Claims window: Claim Info tab , based on the waiting period you enter.

Alternate Waiting Periods	If the employee is eligible for multiple Benefit Disability types, select the button to open the Alternate Waiting Periods window and enter the waiting periods for each disability type.

> Note: If you do not enter alternate waiting periods for each benefit disability type, RISKMASTER uses the Waiting Period from the Disability Date for all benefit disability types.

Maximum Duration of Disability	Enter the maximum time period of time for which an employee will receive short term disability benefits under this plan class.
Through Age	Enter the maximum age till which the employee can get short term disability benefits under this plan class.
Over Age	Enter the minimum age till which the employee can get short term disability benefits under this plan class.
Determine Work Week	Select the work week to use for benefits calculations.

> Note: RISKMASTER uses the work week you specify to determine the benefit payment amount for each day.

6.   Complete fields on the Benefit Calculation tab .

Benefit Calculation

Percentage of Monthly Wage	Select the option and enter a percentage.
	RISKMASTER uses the percentage of the employee's monthly wage to calculate the benefit. If you select this option and leave the percentage as zero RISKMASTER uses 100% of the monthly wage for calculations.
Supplement Percent	Enter the supplement percentage for the disability benefit.
	This field is available if you select the Percentage of Monthly Wage option in benefit calculation.
Flat Amount	Select the option and enter a dollar amount.
	RISKMASTER uses the dollar amount as the weekly benefit payment, regardless of the employee's weekly wage.
Supplement Flat Amount	Enter the flat supplement amount for the disability benefit.
	Note: This field is available if you select the Flat Amount option in benefit calculation.
Table Driven	Select the option to use the preset benefit amount based on the employee's hourly,weekly or monthly wage range.
Based on	From the drop down list select the rate you want to use to set the benefit amounts for wage ranges.
	This option is available if you select the Table Driven option for hourly, weekly, monthly Benefit.
Table Driven Benefits	Select the button to open the Table Driven Benefits window .
Taxable Portion (Leave 0 for 100%)	Enter the percentage of the disability benefit that is taxable.
	For example, If a claimant has a weekly benefit of $800.00 and a taxable portion of 50% then RISKMASTER calculates the tax withheld for $400.00.
	If you enter 0% RISKMASTER uses 100% of the weekly benefit taxable.
Federal Income Tax	Select the check box if you want to withhold federal income tax from the disability benefit.
FICA	Select the check box if you want to withhold percentage contributions as Social Security tax, based on the Federal Insurance Contributions Act (FICA).
Medicare	Select the check box if you want to withhold percentage contributions as medicare, based on the Federal Insurance Contributions Act (FICA).
State	Select the check box if you want to withhold state tax from the disability benefit.
Supplement/Buy Up Option	

Separate Payment for Supplement Benefit	Select the check box if you want to separate payment for supplement benefit.
Bank Account	From the drop down list, select the bank account from which the payment will be made.
Transaction Type	From the drop down list, select the disability type.
Reserve Type	Displays the reserve account from which the compensation amount is payable.

7.   Complete fields on the Benefit Limits/Check Options/Offsets tab .

8.   From the toolbar, select the Save button .
9.   On the Plan Classes window, select Back to Plan.
10.   If your organization defined Supplemental data, complete the Supplementals tab.

11.   From the toolbar, select the Save button .

12.   Note: Search for information in existing records, before you enter new data . This prevents double entries in the database .

To Edit a Non-Occupational Disability Plan

1.   From the main menu, select Maintenance.
        The Maintenance menu opens.

2.   From the Maintenance menu, choose Plan Management.
        The Non-occupational disability plan administration window opens and a Plan Management link displays under Maintenance node in the navigation tree.

3.   Select the buttons, to move between records and open the plan you want to edit.
4.   Edit the information in the fields.
5.   To edit information about classes, select the Plan Classes button.
        The Plan Classes window opens.

6. Select the [icons] buttons, to move between records and open the to the class you want to edit.

7. Edit the information in the fields.

8. From the toolbar, select the Save button [icon].

9. To close the Plan Classes window, select Back to Plan.

10. From the toolbar, select the Save button [icon].

Employee Maintenance

Employee Maintenance

You can enter information about employees directly into the database.

To Work with Employee Information

You can enter information about employees directly into the database.

To add employee information

1. From the main menu, select Maintenance.
    The Maintenance menu opens.

2. From the Maintenance menu, choose Employee.
    The Employee Maintenance window opens and an Employee link displays under Maintenance node in the navigation tree.

3. Select and complete the fields on the Employee tab , as shown below.

Employee Number	Enter a unique identifying number for the employee.
Last Name	Enter the employee's last name.
Middle Name	Enter the employee's middle name.
First Name	Enter the employee's first name.
Initials	Enter the employee's initials.
Also Known As	Enter any other names the employee is known by.
Address	Enter the employee's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Soc. Sec No	Enter the employee's social security number.

Date of Birth	Enter employee's date of birth.
Office	From the drop down list, select the employee's primary contact number type and then enter the corresponding contact number.
Home	From the drop down list, select the employee's secondary contact number type and then enter the corresponding contact number.
Fax	Enter the employee's fax number.
Title	Enter the employee's official title, if any.
Sex	Enter the employee's gender or select the button to select from the Code Selection window.
Freeze Payments	Select the check box if you want to freeze the payments for the employee.
Marital Status	Enter the code that describes the employee's marital status or select the button to select from the Code Selection window.

4. Select and complete the fields in the Employment Info tab , as shown below.

Date Hired	Enter the date on which the employee was hired or select the button to select from a calendar.
Termination Date	If the employee no longer works for your organization, enter the employee's last work day or select the button to select from a calendar.
Position Code	Enter the code that best describes the employees job or select the button to select from the Code Selection window.
Active	Select the check box if the employee is currently working in your organization.
Department	Enter the department the employee worked for or select the button to select from the Org Hierarchy window.
Full Time Employee	Select the check box if the employee works at least 40 hours per week.
Supervisor	Enter the supervisor's name or select the button to open the Standard Entity Search window and search for the employee's supervisor.
Exempt	Select the check box if the employee is a salaried employee.

Pay Type	Enter the code that indicates whether an employee is salaried or is paid hourly or select the 🔍 button to select from the Code Selection window.
No. of Exemptions	Enter the number of exemptions the employee claims on salary for tax purposes.
Pay Amount	If the employee is salaried, enter the employee's salary.
Hours Per Week	Enter the employee's regularly scheduled number of work hours per week.
Hourly Rate	If the employee is paid hourly, enter the employee's hourly pay.
Weekly Rate	RISKMASTER calculates the employee's weekly rate based on the hourly rate and the number of hours worked in a week.
Monthly Rate	RISKMASTER calculates the employee's monthly rate based on the hourly rate and the number of hours worked in a week.
Job Class	Enter the code that best describes the kind of work the employee undertakes or select the 🔍 button to select from the Code Selection window.
Effective Date	Enter the date from which the entity becomes effective or select the 📅 button to select the date from a calendar. Note: By default present date is set as the effective date for any entity, but it can be changed to future or past date.r
Expiration Date	Enter the date from which the entity expires or select the 📅 button to select the date from a calendar Expiration date can also be in past or future but it should be greater than or equal to set Effective date set, otherwise an error message is displayed.
Not Eligible for Disability Benefits	Select the check box if the employee is not eligible for disability benefits.
Disability Option	Enter the code that best describes the disability or select the 🔍 button to select from the Code Selection window.
Work Week	Select the days of the week the employee works.

5. Select and complete the fields in the Employee Info tab, as shown below.

license Number	Enter the employee's driving license number.
license Type	Enter the code that best describes the driving license type or select the 🔍 button to select from the Code Selection window.

license Jurisdiction	Enter the jurisdiction in which the driving license is valid or select the 🔍 button to select from a States window.
Expiration Date	Enter the date on which the driving license expires or select the button to select from the calendar.
Restrictions	Enter the code that best describes the restrictions that apply on the driving license or select the 🔍 button from the Code Selection window.
NCCI Class	Enter the code for the job class as determined by the National Council of Compensation Insurers or select the 🔍 button to select from the Code Selection window.
Date Last Verified	Enter the date on which the authorities verified the license for validity or select the button to select from the calendar.
Date of Death	If the employee expired, enter the date on which the employee died or select the button to select from the calendar.
Insurable	Select the check box if the employee is insured .
EMail Type	Enter the code that best describes the email system type or select the 🔍 button to select from the Code Selection window.
EMail Address	Enter the employee's email address.
Cost Center	Enter the code that best describes the employee's cost center or select the 🔍 button to select from the Code Selection window.
Work Permit #	Enter the employee's work permit number.
Work Permit Date	Enter the date on which the employee was issued the work permit.
Number of Violations	Enter the number of work violations the employee committed.

6. Select the Addresses tab and select the 📄 button.

   The Addresses window opens.

7. Complete the fields on the Addresses window, as shown below.

Address1	Enter the employee's address details.
Address2	Enter the employee's address details.
City	Enter the employee's city.

State	Enter the employee's state or select the 🔍 button to select from the code selection window.
Country	Enter the employee's country or select the 🔍 button to select from the code selection window.
County	Enter the employee's county.
Zip/Postal Code	Enter the employee's zip/postal code.
Email Address	Enter the employee's email address.
Fax	Enter the employee's fax number.
Primary Address(Mail To)	Select this check box to mark this address as the primary address.
OK	Select to save information on the Addresses window.
Cancel	Select to close the window without saving the record.

8. If your organization defined Supplemental data, complete the Supplemental tab.
9. To enter information about the employee's dependants, select the Dependents button.
   The Employee Dependent window opens.

10. Complete the fields on the [Employee Dependent window] , as shown below .

Dependant's Last Name	Enter the dependent 's last name.
First Name	Enter the dependent's first name.
Middle Name	Enter the dependent's middle name.
Address	Enter the dependent's address. Enter the City, State, Zip, and Country in the appropriate fields.
Relation to Employee	Enter the code that best describes the dependent's relationship with the employee or select the 🔍 button to select from the Code Selection window.
Included in Employee's Health Plan	Select the check box if the dependent is covered in the employee's health plan.

Soc. Sec No.	Enter the dependent's Social Security Number (SSN).
Date of Birth	Enter the employee's date of birth or select the button to select from a calendar.
Age	Enter the employee's current age.
Sex	Enter the employee's gender or select the [icon] button to select from the Code Selection window.
Back to Employee	Select to open the Employee window .

11.   To enter information about the violations committed, select the Violations button.
      The Employee Violation window opens.

12.   Complete the fields on the Employee Violation window , as shown below .

Violation Info

Violation Date	Enter the date on which the employee committed a violation or select the button to select from the calendar.
Violation	Enter the code that best describes the violation type or select the [icon] button to select from the Code Selection window.
Back to Employee	Select to open the Employee window .

13.   From the toolbar, select the Save button [icon] .

To edit employee information

1.   Search for the employee record you want to edit.
     The Employee window opens and displays the information in the appropriate fields.

2.   Select each of the tabs, and edit the information in the fields.

3.   To edit employee dependant information, select the Dependents button and open the Employee Dependent window.

4.   To edit employee's violations information, select the Violations button and open the Employee Violation window.

5.   Edit the information in the fields.

6.   From the toolbar, select the Save button [icon] .

Entity Maintenance

Entity Maintenance

You can enter information about business entities directly into the database through this window. You can create new entities and modify information associated with them using this window. The information captured through Entity maintenance is subsequently used in various modules in .

To Work with Entity Information

You can enter information about business entities directly into the database.

To add business entities information

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Entity.

   The Entity Maintenance window opens and an Entity link displays under Maintenance node in the navigation tree.

3. Complete the fields on the Entity tab , as shown below .

Type of Entity	From the drop down list, select the entity type.
ID Type	From the dropdrown list select the type of ID as SSN (Social Security Number) or FEIN (Federal Employee Identification Number) to use for the entity.
	Note: The ID Type selected here is displayed as field on the Entity Maintenance window and you can enter the ID number in that field.
Name	Enter the business entity's name.
Contact	Enter a person to contact at the business entity.
DBA	Enter business entity's database administrator's name.
Abbreviation	Enter a short identifying name for the entity.
	By default, the first character of the name specified in the Name field is set as the Abbreviation. You can modify the abbreviation if you want another short name for the entity.
Address 1, Address 2, Address 3, Address 4	Enter the business entity's address in the Address fields. You can use the Address 1,2,3,4 fields to enter multiple lines of addresses with upto 100 characters in each field.
	Enter the City, State, Zip, County and Country in the appropriate fields.
Title	Enter business entity's title.
Tax Id / FEIN/ SSN	Enter the business entity's tax identification number or FEIN number.
	Note: The field is displayed based on the selection made in the ID Type field. Eg. If you select SSN in the ID Type field, you would be able to enter SSN number in this field.

Office	From the drop down list, select the entity's primary contact number type and then enter the corresponding contact number.
Home	From the drop down list, select the entity's secondary contact number type and then enter the corresponding contact number.
Fax	Enter the business entity's fax number.
EMail Type	Enter the type of email system the business entity uses.
EMail	Enter the business entity's email address.
Parent	Select the ••• button to open the Search window and search for the parent entity
1099 Reportable	Select the check box if you have to issue a 1099 report for the entity.
	Select the check box only if you have consistently checked all 1099 reportable data in RISKMASTER throughout the year and have ensured that the data is accurate.
Effective Date	Enter the date from which the entity becomes effective or select the ▦ button to select the date from a calendar.
	Note: By default present date is set as the effective date for any entity, but it can be changed to future or past date.r
Expiration Date	Enter the date from which the entity expires or select the ▦ button to select the date from a calendar
	Expiration date can also be in past or future but it should be greater than or equal to set Effective date set, otherwise an error message is displayed.
1099 Parent	Select the ••• button to open the Search window and search for the 1099 reportable parent entity.
	When you select the parent data as 1099 reportable, RISKMASTER marks all associated child data as 1099 reportable.
Freeze Payments	Select the check box if you want to freeze the payments for the entity.
	If you select this check box, you can still create payments with this entity as the payee . However, the payment will be filtered out of the check run when you try to print checks and the checks with this entity as the payee will not be included in the Precheck register
Entity Payment Approval Status	Enter the entity's status for payment approval or select the 🔍 button to select from the Code Selection window.
	This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.

<table>
<tr><td>**Payment Approval/Rejected Reason**</td><td>Select the button to open RISKMASTER Editor and enter a reason for the payment approval/rejection.</td></tr>
<tr><td></td><td>This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.</td></tr>
</table>

4. Select the Operating As tab and select the button.
    The Operating As Information window opens.

5. Complete the fields on the Operating As Information window , as shown below .

Initial	Enter the entity's initial.
Name	Enter the entity's operating name.
OK	Select to save information on the Operating As Information window.
Cancel	Select to close the window without saving the record.

6. Select the Contact Info tab and select the button.
    The Contact Info window opens.

7. Complete the fields on the Contact Info window , as shown below .

Name	Enter the contact's name.
Title	Enter the contact's title.
Initial	Enter the contact's initial.
Address	Enter the contact's address. Enter the City, State and Postal or Zip Code.
Phone	Enter the contact's phone number.
Fax	Enter the contact's fax number.
Email Address	Enter the contact's email address.
OK	Select to save information on the Contact Info window.
Cancel	Select to close the window without saving the record.

8. Select the Addresses tab and select the button.
    The Addresses window opens.

9. Complete the fields on the Addresses window, as shown below.

Address1	Enter the business entity's address details.
Address2	Enter the business entity's address details.
City	Enter the business entity's city.
State	Enter the business entity's state or select the button to select from the code selection window.
Country	Enter the business entity's country or select the button to select from the code selection window.
County	Enter the business entity's county.
Zip/Postal Code	Enter the business entity's zip/postal code.
Email Address	Enter the business entity's email address.
Fax	Enter the business entity's fax number.
Primary Address(Mail To)	Select this check box to mark this address as the primary address.
OK	Select to save information on the Addresses window.
Cancel	Select to close the window without saving the record.

10. To enter provider contract information, select the Contracts button and complete the Provider Contract window.
11. To enter the license jurisdictions for the entity, select the Jurisdictional license Or Code button and complete the Jurisdictional license Or Code window.
12. If your organization defined Supplemental data, complete the Supplementals tab.

13. From the toolbar, select the Save button .

To edit business entity information

1. Search for the entity record you want to edit.
   The Entity Maintenance window opens and displays the information in the appropriate fields.

2. Select each of the tabs and edit the information in the fields.

3. On the Operating As tab, from the table, select the record you want to edit and select the button.

4. On the Contact Info tab, from the table, select the record you want to edit and select the button.

5. To edit the provider contract information, select the Contracts button and open the Provider Contract window.

6. To edit license jurisdiction for the entity, select the Jurisdictional license Or Code button and open the Jurisdictional license Or Code window.

7. Edit the information in the fields.

8. From the toolbar, select the Save button

To Enter Provider Contract Information

1. Search for the entity, people, or physician for whom you want to enter provider contract information.
   The appropriate window opens.

2. Select the Contract button.
   The Provider Contract window opens.

3. Complete the fields on the Contract tab, as shown below.

Start Date	Enter the date from which the contract is effective or select the button to select from the calendar.
End Date	Enter the date till which the contract is effective or select the button to select the calendar.
	If the contract is ongoing, you can leave the End Date field blank.
Amount	Enter a contract amount.
	If you enter a contract amount, you cannot enter the Per Diem rates or Fee Schedule/Discount rates.
Comments	Enter additional information related to the contract.

4. Select and complete the fields on the Per Diem Rate tab, as shown below.

First Rate	Enter the per diem (per day) rate for the first term of contract service.
Day when first rate changed	If the per diem rate changes after a certain number of days of service, then enter the number of days after which the per diem rate changes.
	For example, if you enter 3 then RISKMASTER applies the changed rate on the 3rd day of service and thereafter.
Second Rate	Enter the changed per diem rate.
Day when 2nd rate changed	If the per diem rate changes for a second time after a certain number of days of service, then enter the number of days from the start of service after which the per diem rate changes.
	For example, if you enter 5 then RISKMASTER applies the changed rate on the 5th day of service and thereafter.
Last Rate	Enter the changed per diem rate based on the second rate.

5. Select and complete the fields on the State/WC Fee Schedule/Discount tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to workers' compensation related service.
Discount %	Enter the percentage discount on the contract provider's fee schedule-based hospital fees for workers' compensation related service.

Factor %	Enter the percentage of the fees you pay the contract provider for workers' compensation related service.

Choose a Fee Schedule OR Choose State for Automatic Fee Schedule Based On Bill Date

Fee Schedule	From the drop down list, select the fee schedule you want to use to calculate fees for workers' compensation related service.
	The contract discount applies over and above the fee amount based on this fee schedule.
State	From the drop down list, select a state for automatic fee scheduling.
	RISKMASTER uses a fee schedule from the available fee schedules for that state, based on the dates on the bill.

6. Select and complete the fields on the Other tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to non-workers' compensation related service.
Discount %	Enter the percentage discount on the contract provider's fee schedule-based hospital fees for non-workers' compensation related service.
Factor %	Enter the percentage of the fees you pay the contract provider for non-workers' compensation related service.
Fee Schedule	From the drop down list, select the fee schedule you want to use to calculate fees for non-workers' compensation related service.
	The contract discount applies over and above the fee amount based on this fee schedule.

7. Select and complete the fields on the Amount Billed tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to regular hospital fees.
Discount %	Enter the percentage discount you will get on the contract provider's regular fees.
Factor %	Enter the percentage of the regular fees you will pay the contract provider.

8. From the toolbar, select the Save button .

Tips

To Enter License Jurisdictions

1. Search for the entity or people for whom you want to edit license jurisdiction.
    The appropriate window opens.

2. Select the Jurisdictional license Or Code button.
    The Jurisdictional license Or Code window opens.

3. Complete the fields on the Jurisdictional license Or Code window , as shown below .

Jurisdiction	Enter the jurisdiction or select the 🔍 button to select from the States list.
Code or license Number	Enter the jurisdictional code or license number.
Effective Date	Enter the date from which the jurisdictional code or license number is effective or select from the calendar.
Expiration Date	Enter the date on which the jurisdictional code or license number expires.
All Lines of Business	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to all the lines of business, or select the 🔍 button to select from the Code Selection window.
General Claims LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to general claims, or select the 🔍 button to select from the Code Selection window.
Vehicle Accident LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to vehicle accident claims, or select the 🔍 button to select from the Code Selection window.
Non Occupational LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to non-occupational claims, or select the 🔍 button to select from the Code Selection window.
Workers' Compensation LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to worker's compensation claims, or select the 🔍 button to select from the Code Selection window.

4. From the toolbar, select the Save button 💾.
5. To open the Entity Maintenance window, select the Back To Entity button.

Backup Withholding Overview

You can set up backup withholding on Entities in and split out payments to the withholding recipient. Backup withholding is set individually for each entity through the Entity Maintenance. When a payment is printed which has a backup withholding setup, the system displays a warning message stating that the amount of the payment is going to be reduced due to a withholding.

The rights to set up, modify, or delete a withholding setup is assigned in the Security Management System.

Backup withholding is created when a payment status changes to Printed. RISKMASTER does not apply withholdings for existing payments, with the exception of autochecks and non-occupational claim payments because these have not yet been printed. When printing checks for one of the payments in a withholding group the associated withholding payments must also be printed .

The parent payment and the backup withholding payment are treated as groups. If one is voided or cleared the whole group is voided or cleared. Child payments are voided if the parent payment is voided and parent payment is voided if a child payment is voided. A payment that is part of a withholding payment (parent or child) cannot be reissued. To reissue a check that is part of a backup withholding payment you must void and then enter the payment again.

If a payment is created which uses EFT then none of the payments in the withholding group can be voided.

Backup withholdings are limited to payments where the payee is either Other Payees (People & Entities) or Other Payees (Org. Hierarchy).

To Setup Backup Withholding

1. Search and open the entity record you want to setup backup withholding for.

2. From the toolbar select the [icon] button.

    The Backup Withholding window opens.

3. Select the Enable Backup Withholding check box to activate backup withholding feature for the selected entity record.
4. In the Percentage field, enter the amount of payment to be reserved for selected entity or payee.
5. In the Recipient field, select the Ellipses button to open the Standard Entity Search window to select the entity that receives the withholding payment.
6. Select the Voucher Payment check box to set payment as check or voucher.

    Note: The payment will be processed as a check however will not print a physical check from RMX.

7. Select the Save button to save changes.

Patient Tracking

Patient Tracking

You can enter detailed information about procedures applied on Patient through this window. Use the module to enter information pertaining to address, physician, patient facility etc which is used in different modules in .

To Work with Patient Information

You can enter information about patients directly into the database .

To add patient information

1. From the main menu, select Maintenance.

    The Maintenance menu opens.

2. From the Maintenance menu, choose Patient Tracking.

    The Patient Tracking window opens and a Patient Tracking link displays under Maintenance in the navigation tree.

3. Select and complete the fields in the Patient tab , as shown below.

Last Name	Enter the patient's last name.
First Name	Enter the patient's first name.
Middle Name	Enter the patient's middle name.
Date of Birth	Enter the patient's date of birth.
Also Known as	Enter any other names that the patient is known by.
Address	Enter the patient's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Soc. Sec No.	Enter the patient's social security number .
Title	Enter the patient's title.
Office	From the drop down list, select the patient's primary contact number type and then enter the corresponding contact number.
	By default, Office is selected as the primary contact number type.
Home	From the drop down list, select the patient's secondary contact number type and then enter the corresponding contact number.
	By default, Home is selected as the secondary contact number type.
Fax	Enter the patient's fax number.
Initials	Enter the patient's initials.
Sex	Enter the employee's gender or select the button to select from the Code Selection window.
Marital Status	Enter the code that describes the employee's marital status or select the button to select from the Code Selection window.
Entity Payment Approval Status	Enter the patient's status for payment approval or select the button to select from the Code Selection window.
	This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.
Payment Approval/Rejected Reason	Select the button to open RISKMASTER Editor and enter a reason for the payment approval/rejection.

This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.

4.   Select and complete the fields in the Admission Info tab , as shown below.

Patient Account No.   Enter the patient's assigned account number.

Medical Record No.   Enter the number to track the patient's current records.

Ins Plan Group No.   Enter the patient's insurance plan group number.

Date/Time of Admission   Enter the date and time when the hospital admitted the patient.

Date/Time of Discharge   Enter the date and time when the hospital discharges the patient.

Exp. Length of Stay   Enter the length of time, the patient is expected to stay in the hospital in days.

Admission Type   Enter the code that best describes the reason for admitting the patient to the hospital or select the button to select from the Code Selection window.

Admission Source   Enter the code that best describes who referred the patient to the hospital or select the search button to select from the Code Selection window.

Admission Reason   Enter the button to open the RISKMASTER Editor and enter any additional reasons for the patient's hospitalization.

Acuity level   Enter the code that best describes the severity of the patient's condition or select the button to select from the Code Selection window.

Patient Status   Enter the code that best describes the current status of the patient or select the button to select from the Code Selection window.

Patient Condition   Enter the code that best describes the patient's mental and physical state in the last medical examination or select the button to select from the Code Selection window.

Discharge Disp   Enter the code that best describes the patient's disposition at the time of discharge or select the button to select from the Code Selection window.

Expected Cost   Enter the anticipated cost the patient will incur for the hospital stay.

Action(s) Taken   Enter the actions taken when the patient took ill or select the button to select from the Code Selection window.

Cardiac Arrest	Select the check box, if the patient suffered from a cardiac arrest.
DRG /Revenue Codes	Enter the DRG/Revenue codes or select the button to select from the Code Selection window.

5. Select and complete the fields in the Patient/Facility Info tab , as shown below.

Patient Type	Enter the code that best describes the patient type or select the button to select from the Code Selection window.
Patient Weight	Enter the patient's weight.
Patient Height	Enter the patient's height.
Patient Race/Ethnicity	Enter the code that best describes the patients racial or ethnic background or select the button to select from a Code Selection window.
Primary Pay Code	Enter the code that best describes how the patient pays for the hospital services or select the button to select from the Code Selection window.
Secondary Pay Code	If the patient pays for the services rendered in more than one form, enter the code that best describes the other form of payment , or select the button to select from the Code Selection window.
Emerg Contact	Enter the name of the person to call in case of an emergency.
Emergency Contact No.	Enter the emergency contact's phone number.
Patient Room No.	Enter the room number the patient occupies in the hospital.
Facility Unit Code	Enter the code that best describes the facility type or select the button to select from the Code Selection window.
Facility Department	Enter the code that best describes the department to which you admitted the patient or select the button to select from the Code Selection window.
HCO ID No	Enter the identification number for the Health Care Organization (HCO).
HCO Site ID No.	Enter the identification number for this facility of the Health Care Organization (HCO).
Episode of Care ID	Enter the case identification number.

6. Select and complete the fields in the Physician/Diagnosis Info tab , as shown below.

Primary Physician	Enter the primary physician responsible for the patient's care or select the ··· button to search from the Standard Entity Search window.
Admitting Physician	Enter the physician who authorized the patient's admission into the hospital or select the ··· button to search from the Standard Entity Search window.
Attending Physician	Enter the attending physician for the department the patient is admitted in or select the ··· button to search from the Standard Entity Search window.
Date of Death	If the patient expired, enter the date on which the patient died.
Disability Type	Enter the code that best describes the patient's disability or select the 🔍 button to select from the Code Selection window.
Illness Type	Enter the code that best describes the patient's illness or select the search button to select from the Code Selection window.
Body Parts	Enter the code that best describes the limbs, bones, or organs involved in the injury or select the 🔍 button to select from the Code Selection window.
Diagnosis	Enter the code that best describes the primary physician's diagnosis or select the 🔍 button to select from the Code Selection window.
Treatment	Enter the code that best describes the treatment for the injury or illness or select the 🔍 button to select from a Codes Selection window.
Lost Consciousness	Select the check box if the employee became unconscious as a result of the injury or illness.
Injuries	Enter the code that best describes the treatment for the injury or illness or select the 🔍 button to select from the Code Selection window.

7. Select and complete the fields in the Newborn Info tab , as shown below.

APGAR Score	Enter the newborn's APGAR score.
	The APGAR test occurs right after your baby's birth in the delivery or birthing room and comprises of Activity, Pulse, Grimace, Appearance, and Respiration scores.
Birth Weight	Enter the newborn's birth weight.
Length of Gestation	Enter the length of gestation in weeks.
Cephalic Molding	Enter the code that best describes the newborn's cephalic molding or select the 🔍 button to select from the Code Selection window.

NB Episode of Care ID	Enter the case identification number for the newborn.
NICU Stay	Enter the code that best describes whether the newborn stayed at the Neonatal Intensive Care Unit (NICU) or select the ⬚ button to select from the Code Selection window.
NICU Admission Date	Enter the date on which the newborn was admitted into the Neonatal Intensive Care Unit or select the button to select from a calendar.
NICU Discharge Date	Enter the date on which the newborn was discharged from the Neonatal Intensive Care Unit or select the button to select from a calendar.
Parity	Enter the number of times a female has given birth to babies.
Prior C Section History	Enter the code that best describes whether or not the mother has had prior C sections or select the ⬚ button to select from the Code Selection window.
Medically Induced Labor	Enter the code that best describes whether or not the labor was medically induced or select the ⬚ button to select from the Code Selection window.
Number of Live Births	Enter the number of live babies the mother has given birth to in the past.
Number of Still Births	Enter the number of still born babies the mother has given birth to in the past.
Gravida	Enter the number of pregnancy for the mother. Enter 1 if this is the first pregnancy, 2 if this is the second pregnancy, and so forth.
NB Mother Episode of Care ID	Enter the case identification number for the newborn's mother.

8. Select the Addresses tab and select the ⬚ button.

   The Addresses window opens.

9. Complete the fields on the Addresses window, as shown below.

Address1	Enter the patient's address details.
Address2	Enter the patient's address details.
City	Enter the patient's city.
State	Enter the patient's state or select the ⬚ button to select from the code selection window.

Country	Enter the patient's country or select the button to select from the code selection window.
County	Enter the patient's county.
Zip/Postal Code	Enter the patient's zip/postal code.
Email Address	Enter the patient's email address.
Fax	Enter the patient's fax number.
Primary Address(Mail To)	Select this check box to mark this address as the primary address.
OK	Select to save information on the Addresses window.
Cancel	Select to close the window without saving the record.

10. If your organization defined Supplemental data and complete the Supplementals tab.
11. To enter information on the procedure used, select the Procedures button.
    The Patient Procedure window opens.
12. Complete the fields on the Patient Procedure window , as shown below .
13. Select the Back to Patient button.
14. From the toolbar, select the Save button .

To edit patient information

1. Search for the patient record you want to edit.
   The record opens in the Patient Tracking window.
2. Select each of the tabs to edit the information in the fields.
3. To edit the information on procedures performed on the patient, select the Procedures button to open the Patient Procedure window.
4. From the toolbar, select the Save button .

People Maintenance

People Maintenance

Using this module, you can enter information about people other than employees, physicians, or medical staff directly into the database.

To Work with People Information

You can enter information about people other than employees, physicians, or medical staff directly into the database .

To add people information

1. From the main menu, select Maintenance.

The Maintenance menu opens.

2. From the Maintenance menu, choose People.

    The People Maintenance window opens and People link displays under Maintenance node in the navigation tree.

3. Complete the fields on the People tab ,as shown below.

Type Of Person	From the drop down list, select the person type.
Last Name	Enter the person's last name.
First Name	Enter the person's first name.
Date of Birth	Enter the person's date of birth.
Also Known As	Enter any other name that the person may be known by.
Initials	Enter the person's initials.
Address	Enter the person's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Soc. Sec No	Enter the person's social security number .
Office	From the drop down list, select the person's primary contact number type and then enter the corresponding contact number.
Home	From the drop down list, select the person's secondary contact number type and then enter the corresponding contact number.
Fax	Enter the person's fax number.
Sex	Enter the employee's gender or select the [icon] button to select from the Code Selection window.
EMail Type	Enter the type of email system the person uses or select the [icon] button to select from the Code Selection window.
EMail	Enter the person's email address.
1099 Reportable	Select the check box if you have to issue a 1099 report for the entity.
	When you select the parent data as 1099 reportable, RISKMASTER marks all associated child data as 1099 reportable.
1099 Parent	Select the [icon] button to open the Standard Entity Search window and search for the 1099 reportable parent entity.

When you select the parent as 1099 reportable, RISKMASTER marks associated child data as 1099 reportable.

Effective Date

Enter the date from which the entity becomes effective or select the [icon] button to select the date from a calendar.

Note: By default present date is set as the effective date for any entity, but it can be changed to future or past date.r

Expiration Date

Enter the date from which the entity expires or select the [icon] button to select the date from a calendar

Expiration date can also be in past or future but it should be greater than or equal to set Effective date set, otherwise an error message is displayed.

Entity Payment Approval Status

Enter the person's status for payment approval or select the [icon] button to select from the Code Selection window.

This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.

Payment Approval/Rejected Reason

Select the [icon] button to open RISKMASTER Editor and enter a reason for the payment approval/rejection..

This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.

Suffix (Legal)

Enter a suffix to be included after person's name for legal purposes. The legal suffix is used for EDI and other compliance reporting..

Suffix (Common)

Enter a suffix to be added after the person's name or select the [icon] button to select from the Code Selection window

The suffix will display in the "Pay To The Order of" field on the Funds window: Transaction tab and the Schedule Automatic Checks window when on the Payment Parameter Setup window: Check Options tab, the Include Suffix on Payments check box ix selected.

Prefix

Enter a prefix to be added before the person's name or select the [icon] button to select from the Code Selection window.

The prefix will display in the "Pay To The Order of" field on the Funds window: Transaction tab and the Schedule Automatic Checks window when on the Payment Parameter Setup window: Check Options tab, the Include Prefix on Payments check box ix selected.

4. Select the Operating As tab and select the [icon] button.

   The Operating As Information window opens.

5. Complete the fields on the Operating As Information window , as shown below .

   Initial   Enter the person's initial.

	Name	Enter the person's operating name.
	OK	Select to save the information on the Operating As Information window.
	Cancel	Select to close the window without saving the record.

6. Select the Contact Info tab and select the button.
   The Contact Info window opens.

7. Complete the fields on the Contact Info window , as shown below .

Name	Enter the contact's name.
Title	Enter the contact's title.
Initial	Enter the contact's initial.
Address	Enter the contact's address. Enter the City, State and Postal or Zip Code.
Phone	Enter the
Fax	Enter the contact's fax number.
Email Address	Enter the contact's email address.
OK	Select to save the information on the Contact Info window.
Cancel	Select to close the window without saving the record.

8. Select the Addresses tab and select the button.
   The Addresses window opens.

9. Complete the fields on the Addresses window, as shown below.

Address1	Enter the person's address details.
Address2	Enter the person's address details.
City	Enter the person's city.
State	Enter the person's state or select the button to select from the code selection window.
Country	Enter the person's country or select the button to select from the code selection window.

County	Enter the person's county.
Zip/Postal Code	Enter the person's zip/postal code.
Email Address	Enter the person's email address.
Fax	Enter the person's fax number.
Primary Address(Mail To)	Select the check box to mark this address as the primary address.
OK	Select to save information on the Addresses window.
Cancel	Select to close the window without saving the record.

10. To enter provider contract information, select the Contracts button and complete the Provider Contract window.
11. To enter the license jurisdictions for the entity, select the Jurisdictional license Or Code button and complete the Jurisdictional license Or Code window.
12. If your organization defined Supplemental data, complete the Supplementals tab.
13. From the toolbar, select the Save button .

To edit people information

1. Search for the people record you want to edit.
   The Entity window opens and displays the information in the appropriate fields.

2. Select each of the tabs, and edit the information in the fields.

3. On the Operating As tab, from the table, select the option for the record that you want to edit and select the button.

4. On the Contact Info tab, from the table, select the option for the record that you want to edit and select the button.

5. To edit the provider contract information, select the Contracts button and open the Provider Contract window.

6. To edit employee's violations information, select the Jurisdictional license Or Code button and open the Jurisdictional license Or Code window.

7. Edit the information in the fields.

8. From the toolbar, select the Save button .

To Enter Provider Contract Information

1. Search for the entity, people, or physician for whom you want to enter provider contract information.
   The appropriate window opens.

2. Select the Contract button.
   The Provider Contract window opens.

3. Complete the fields on the Contract tab, as shown below.

Start Date	Enter the date from which the contract is effective or select the button to select from the calendar.
End Date	Enter the date till which the contract is effective or select the button to select the calendar.
	If the contract is ongoing, you can leave the End Date field blank.
Amount	Enter a contract amount.
	If you enter a contract amount, you cannot enter the Per Diem rates or Fee Schedule/Discount rates.
Comments	Enter additional information related to the contract.

4. Select and complete the fields on the Per Diem Rate tab, as shown below.

First Rate	Enter the per diem (per day) rate for the first term of contract service.
Day when first rate changed	If the per diem rate changes after a certain number of days of service, then enter the number of days after which the per diem rate changes.
	For example, if you enter 3 then RISKMASTER applies the changed rate on the 3rd day of service and thereafter.
Second Rate	Enter the changed per diem rate.
Day when 2nd rate changed	If the per diem rate changes for a second time after a certain number of days of service, then enter the number of days from the start of service after which the per diem rate changes.
	For example, if you enter 5 then RISKMASTER applies the changed rate on the 5th day of service and thereafter.
Last Rate	Enter the changed per diem rate based on the second rate.

5. Select and complete the fields on the State/WC Fee Schedule/Discount tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to workers' compensation related service.
Discount %	Enter the percentage discount on the contract provider's fee schedule-based hospital fees for workers' compensation related service.
Factor %	Enter the percentage of the fees you pay the contract provider for workers' compensation related service.

Choose a Fee Schedule OR Choose State for Automatic Fee Schedule Based On Bill Date

Fee Schedule	From the drop down list, select the fee schedule you want to use to calculate fees for workers' compensation related service.

The contract discount applies over and above the fee amount based on this fee schedule.

State	From the drop down list, select a state for automatic fee scheduling.

RISKMASTER uses a fee schedule from the available fee schedules for that state, based on the dates on the bill.

6. Select and complete the fields on the Other tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to non-workers' compensation related service.
Discount %	Enter the percentage discount on the contract provider's fee schedule-based hospital fees for non-workers' compensation related service.
Factor %	Enter the percentage of the fees you pay the contract provider for non-workers' compensation related service.
Fee Schedule	From the drop down list, select the fee schedule you want to use to calculate fees for non-workers' compensation related service.

The contract discount applies over and above the fee amount based on this fee schedule.

7. Select and complete the fields on the Amount Billed tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to regular hospital fees.
Discount %	Enter the percentage discount you will get on the contract provider's regular fees.
Factor %	Enter the percentage of the regular fees you will pay the contract provider.

8. From the toolbar, select the Save button.

Tips

To Enter License Jurisdictions

1. Search for the entity or people for whom you want to edit license jurisdiction.
   The appropriate window opens.

2. Select the Jurisdictional license Or Code button.
   The Jurisdictional license Or Code window opens.

3. Complete the fields on the Jurisdictional license Or Code window , as shown below .

Jurisdiction	Enter the jurisdiction or select the button to select from the States list.

Code or license Number	Enter the jurisdictional code or license number.
Effective Date	Enter the date from which the jurisdictional code or license number is effective or select from the calendar.
Expiration Date	Enter the date on which the jurisdictional code or license number expires.
All Lines of Business	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to all the lines of business, or select the button to select from the Code Selection window.
General Claims LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to general claims, or select the button to select from the Code Selection window.
Vehicle Accident LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to vehicle accident claims, or select the button to select from the Code Selection window.
Non Occupational LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to non-occupational claims, or select the button to select from the Code Selection window.
Workers' Compensation LOB	Enter the code that best describes whether or not you want to apply the jurisdictional code or license number to worker's compensation claims, or select the button to select from the Code Selection window.

4.   From the toolbar, select the Save button .

5.   To open the Entity Maintenance window, select the Back To Entity button.

Physician Maintenance

To Work with Physician Information

You can enter information about physicians directly into the database .

To add physician information

1.   From the main menu, select Maintenance.

   The Maintenance menu opens.

2.   From the Maintenance menu, choose Physician.

   The Physician Maintenance window opens and Physician link displays under Maintenance node in the navigation tree.

3.   Select and complete the fields on the Physician tab , as shown below.

Physician Number	Enter the physician's license number.
Last Name	Enter the physician's last name.

First Name	Enter the physician's first name.
Middle Name	Enter the physician's middle name.
Address	Enter the physician's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Freeze Payment	Select the check box if you want to freeze the payments for the physician.
Med. Staff Number	Enter the number of medical staff that work for the physician.
Soc. Sec No.	Enter the physician's social security number.
Office	From the drop down list, select the physician's primary contact number type and then enter the corresponding contact number.
Home	From the drop down list, select the physician's secondary contact number type and then enter the corresponding contact number.
Beeper #	Enter the physician's beeper or pager number.
Cellular Phone	Enter the physician's cell phone number.
Fax	Enter the physician's fax number.
Emergency Contact #	Enter the phone number to call the physician in an emergency.
1099 Reportable	Select the check box if you have to issue a 1099 report for the physician.

> When you select the parent data as 1099 reportable, RISKMASTER marks all associated child data as 1099 reportable.

Effective Date	Enter the date from which the physician record becomes effective or select the button to select the date from a calendar
Expiration Date	Enter the date from which the physician record expires or select the button to select the date from a calendar
1099 Parent	Select the button to open the Standard Entity Search window and search for the 1099 reportable parent entity.

> When you select the parent data as 1099 reportable, RISKMASTER marks associated child data as 1099 reportable.

Entity Payment Approval Status	Enter the physician's status for payment approval or select the button to select from the Code Selection window.
	This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.
Payment Approval/Rejected Reason	Select the button to open RISKMASTER Editor and enter a reason for the payment approval/rejection..
	This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.

4. Select and complete the fields in the Physician Info tab , as shown below.

Initials	Enter the physician's initials.
Also known as	Enter any other names the physician is known by.
Sex	Enter the physician's gender or select the search button to select from the Code Selection window.
Marital Status	Enter the physician's marital status or select the search button to select from the Code Selection window.
Date of Birth	Enter physician's date of birth.
Home Address	Enter the physician's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Insurance Policy	Select the button to open the Standard Policy Search window and select the physician's insurance policy.
Medicare Number	Enter the physician's medicare policy number.
Primary Specialty	Enter the branch of medicine the physician specializes in or select the search button to select from the Code Selection window.
Mailing Address	Enter the physician's mailing address. Enter the City, State, and Zip in the appropriate fields.
Sub Specialties	Enter the sub-specialty of the physician or select the button to select from the Code Selection window.
	To delete a selected sub specialty,from the field select the record and select the button.
EMail Type	Enter the code that best describes the email system type or select the button to select from a Code Selection window.

EMail	Enter the physician's email ID.

5. Select and complete the fields on the Staff Info tab , as shown below.

Staff Status	Enter the code that best describes the physician's employment status or select the button to select from the Code Selection window.
Staff Type	Enter the code that best describes the physician's designation or select the button to select from the Code Selection window.
Staff Category	Enter the code that best describes the physician's category of employment or select the button to select from the Code Selection window.
Internal Number	Enter the number associated with the physician's employment, like an employee number.
Department	Enter the department the physician is associated with or select the button to select from the organizational hierarchy.
Appointment Date	Enter the date on which the physician was appointed.
Reappointment Date	Enter the date on which the physician was reappointed, if there was a break in employment.
license Number	Enter the physician's license number.
NPI Number	Enter the National Provider Identification number.
State	Enter the state the physician is licensed in.
license Issue Date	Enter the date on which the physician's license was issued.
license Expire Date	Enter the date on which the physician's license expires.
DEA Number	Enter the physician's Drug Enforcement Agency (DEA) license number.
DEA Expiration Date	Enter the date on which the physician's Drug Enforcement Agency (DEA) license expires.

6. Select and complete the fields on the Education tab , as shown below.

Continue Education	Enter any continuing education program that the physician is enrolled in.
Teaching Experience	Enter the physician's teaching experience, if any.
Membership	Enter any professional organizations that the physician is a member of.

7. Select the Addresses tab and select the button.

   The Addresses window opens.

8. Complete the fields on the Addresses window, as shown below.

   Address1   Enter the physician's address details.

   Address2   Enter the physician's address details.

   City   Enter the physician's city.

   State   Enter the physician's state or select the button to select from the code selection window.

   Country   Enter the physician's country or select the button to select from the code selection window.

   County   Enter the physician's county.

   Zip/Postal Code   Enter the physician's zip/postal code.

   Email Address   Enter the physician's email address.

   Fax   Enter the physician's fax number.

   Primary Address(Mail To)   Select this check box to mark this address as the primary address.

   OK   Select to save information on the Addresses window.

   Cancel   Select to close the window without saving the record.

9. To enter the provider contract information, select the Contracts button and complete the Provider Contract window.

10. To enter physician's privilege information, select the Privileges button and complete the Physician Privileges window.

11. To enter physician's certification information, select the Certifications button and complete the Physician Certifications window.

12. To enter physician's education information, select the Education button and complete the Physician Education window.

13. To enter physician's previous employment, select the Previous Hospitals button and complete the Physician Previous Hospital window.

14. From the toolbar, select the Save button .

To edit physician information

1. Search for the physician record you want to edit.

   The record opens in the Physician Maintenance window.

2. Select each of the tabs and edit the information in the fields.

3. From the toolbar, select the Save button 💾 .

4. To edit the provider contract information, select the Contracts button and open the Provider Contract window.

5. To edit physician's privilege information, select the Privileges button and open the Physician Privileges window.

6. To edit physician's certification information, select the Certifications button and open the Physician Certifications window.

7. To edit physician's education information, select the Education button and open the Physician Education window.

8. To edit physician's previous employment, select the Previous Hospitals button and open the Physician Previous Hospital window.

9. From the toolbar, select the Save button 💾 .

10. Select Back to Physician to open the Physician Maintenance window.

To Enter Provider Contract Information

1. Search for the entity, people, or physician for whom you want to enter provider contract information.
   The appropriate window opens.

2. Select the Contract button.
   The Provider Contract window opens.

3. Complete the fields on the Contract tab, as shown below.

Start Date	Enter the date from which the contract is effective or select the button to select from the calendar.
End Date	Enter the date till which the contract is effective or select the button to select the calendar.
	If the contract is ongoing, you can leave the End Date field blank.
Amount	Enter a contract amount.
	If you enter a contract amount, you cannot enter the Per Diem rates or Fee Schedule/Discount rates.
Comments	Enter additional information related to the contract.

4. Select and complete the fields on the Per Diem Rate tab, as shown below.

First Rate	Enter the per diem (per day) rate for the first term of contract service.
Day when first rate changed	If the per diem rate changes after a certain number of days of service, then enter the number of days after which the per diem rate changes.
	For example, if you enter 3 then RISKMASTER applies the changed rate on the 3rd day of service and thereafter.
Second Rate	Enter the changed per diem rate.
Day when 2nd rate changed	If the per diem rate changes for a second time after a certain number of days of service, then enter the number of days from the start of service after which the per diem rate changes.
	For example, if you enter 5 then RISKMASTER applies the changed rate on the 5th day of service and thereafter.

Last Rate	Enter the changed per diem rate based on the second rate.

5. Select and complete the fields on the State/WC Fee Schedule/Discount tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to workers' compensation related service.
Discount %	Enter the percentage discount on the contract provider's fee schedule-based hospital fees for workers' compensation related service.
Factor %	Enter the percentage of the fees you pay the contract provider for workers' compensation related service.

Choose a Fee Schedule OR Choose State for Automatic Fee Schedule Based On Bill Date

Fee Schedule	From the drop down list, select the fee schedule you want to use to calculate fees for workers' compensation related service.
	The contract discount applies over and above the fee amount based on this fee schedule.
State	From the drop down list, select a state for automatic fee scheduling.
	RISKMASTER uses a fee schedule from the available fee schedules for that state, based on the dates on the bill.

6. Select and complete the fields on the Other tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to non-workers' compensation related service.
Discount %	Enter the percentage discount on the contract provider's fee schedule-based hospital fees for non-workers' compensation related service.
Factor %	Enter the percentage of the fees you pay the contract provider for non-workers' compensation related service.
Fee Schedule	From the drop down list, select the fee schedule you want to use to calculate fees for non-workers' compensation related service.
	The contract discount applies over and above the fee amount based on this fee schedule.

7. Select and complete the fields on the Amount Billed tab, as shown below.

Apply Discount	Select the check box if you want the discount you enter to apply to regular hospital fees.
Discount %	Enter the percentage discount you will get on the contract provider's regular fees.
Factor %	Enter the percentage of the regular fees you will pay the contract provider.

8. From the toolbar, select the Save button .

Tips

To Enter Additional Physician Information

To add physician privilege information

1. Search for the physician for whom you want to enter privilege information.
   The appropriate window opens.

2. Select the Privileges button.
   The Physician Privileges window opens.

3. Complete the fields on the Physician Privileges window , as shown below .

   Category
       Enter the privilege category or select the [icon] button to select from the Code Selection window.

   Type
       Enter the field of medicine the privilege is associated with or select the [icon] button to select from the Code Selection window.

   Status
       Enter the current status of the privilege or select the [icon] button to select from the Code Selection window.

   Start Date
       Enter the date on which the privilege comes into effect or select the button to select from a calendar.

   End Date
       Enter the date on which the privilege expires or select the button to select from a calendar.

4. From the toolbar, select the Save button [icon].
5. Select the Back to Physician button.

To add physician certification information

1. Search for the physician for whom you want to enter certification information.
   The appropriate window opens.

2. Select the Certifications button.
   The Physician Certifications window opens.

3. Complete the fields on the Physician Certifications window , as shown below .

   Name
       Enter the name of the organization that awards the certification or select the search button to select from the Code Selection window.

   Status
       Enter the current status of the certification or select the search button to select from the Code Selection window.

   Board
       Enter the state certification board for certificate issue or select the search button to select from the Codes Selection window.

   Start Date
       Enter the date on which the certification comes into effect or select the button to select from a calendar

| | **End Date** | Enter the date on which the certification expires or select the button to select from a calendar. |

4. From the toolbar, select the button.
5. Select the Back to Physician button.

To add physician education information

1. Search for the physician for whom you want to enter education information.
   The appropriate window opens.

2. Select the Education button.
   The Physician Education window opens.

3. Complete the fields on the Physician Education window , as shown below .

   Type
   Enter the branch of medicine that the physician has studied or select the button to select from the Code Selection window.

   Institution
   Enter the institution or school from which the physician completed education or select the button to search from the Standard Entity Search window.

   Degree Type
   Enter the degree type issued or select the button to select from the Code Selection window.

   Degree Date
   Enter the date on which the degree was issued or select the button to select from a calendar.

4. From the toolbar, select the button.
5. Select the Back to Physician button.

To add physician previous hospital information

1. Search for the physician for whom you want to enter previous hospital information.
   The appropriate window opens.

2. Select the Previous Hospitals button.
   The Physician Previous Hospital window opens.

3. Complete the fields on the Physician Previous Hospital window , as shown below .

   Status
   Enter the status of the physicians attachment with a hospital or select the button to select from the Code Selection window.

   Hospital
   Enter the name of the hospital that the physician is attached to or select the button to search from the Standard Entity Search window.

   Privilege
   Enter the branch of medicine that the physician deals with at the hospital or select the button to select from the Code Selection window.

   Start Date
   Enter the date from which the physician is attached to the hospital or select the button to select from a calendar.

End Date   Enter the date till which the physician is attached to the hospital.

4.   From the toolbar, select the [icon] button.

5.   Select the Back to Physician button.

Property Maintenance

To Work with Property Information

You can create property records directly in the database. These property records can be used in Property Claims and in the Policy Management System

To add patient information

1.   From the main menu, select Maintenance.
     The Maintenance menu opens.

2.   From the Maintenance menu, choose Property.
     The Property window opens and a Property link displays under Maintenance in the navigation tree.

3.   Select and complete the fields in the Property Info tab, as shown below.

Property ID   Enter a unique identification number for this property.

On the General System Parameter Setup window, System Settings tab, in the General Parameters section, if you selected the 'Autonumber Property ID (PIN)' check box, you can leave this field blank and RISKMASTER will generate a property ID when you save the record.

If you did not select the Autonumber Property ID (PIN) check box, RISKMASTER will prompt you to enter a Property ID before you can save.

Description   Enter a property description. The description cannot be more than 50 characters long.

Address fields   Enter property address.

Territory Code   Select the [icon] button to select a territory code.

Category Code   Select the [icon] button to select a category code.

Appraised Value   Enter the appraised value of the property.

Appraised Date   Enter an appraised date.

If you entered an appraised value you must also enter an appraised date.

Appraised Source   Select the [icon] button to select an appraised source.

Land Value   Enter the land value for the property.

Replacement Value   Enter the replacement value for the property.

4.   Select and complete the fields in the COPE Data Tab, as shown below.

Class of Construction	Enter the property construction class.
Year of Construction	Enter the year when the property was constructed. Year of Construction cannot be later than the present year.
Square Footage	Enter the square footage of the constructed property.
No. of Stories	Enter the total number of stories build on the property.
Avg. Story Height	Enter the average height of a story.
Wall Construction	Enter the wall construction code of the property or select the button to select it from the Code Selection window.
Roof Construction	Enter the roof construction code of the property or select the button to select it from the Code Selection window.
Heating System	Enter the code for heating system of the property or select the button to select it from the Code Selection window.
Cooling System	Enter the code for cooling system of the property or select the button to select it from the Code Selection window.
Fire Alarm	Enter the code for fire alarm or select the button to select it from the Code Selection window.
Sprinklers	Enter the code for sprinkler system or select the button to select it from the Code Selection window.
Entry Alarm	Enter the code for entry alarm or select the button to select it from the Code Selection window.
Roof Anchoring	Enter the code for roof anchoring or select the button to select it from the Code Selection window.
Strength of Glass	Enter the code for strength of glass or select the button to select it from the Code Selection window.

5. Select and complete the fields in the Property: Optional COPE Data Tab, as shown below.

Plot Plans	Enter the plan for the plot or select the button to select it from the Code Selection window.
Flood Zone	Enter the flood zone certification details of the property or select the button to select it from the Code Selection window.
EarthQuake Zone	Enter the earthquake zone information of the property or select the button to select it from the Code Selection window.
GPS Altitude	Enter the Global Positioning System altitude of the property.

<table>
<tr><td>**GPS Latitude**</td><td>Enter the Global Positioning System latitude of the property.

GPS Latitude must be in the range of -90 and 90 and can have decimal values.</td></tr>
<tr><td>**GPS Longitude**</td><td>Enter the Global Positioning System longitude of the property.

GPS Longitude must be in the range of -180 and 180 and can have decimal values.</td></tr>
</table>

6. From the toolbar, select the Save button .

To Edit Property Information

1. Search for the Property record you want to edit.
   The record opens in the Property window.

2. Select each of the tabs to edit the information in the fields.

3. From the toolbar, select the Save button .

Medical Staff Maintenance

Medical Staff Maintenance

You can enter information about medical staff directly into the database through this module.

To Work with Medical Staff Information

You can enter information about medical staff directly into the database.

To add medical staff information

1. From the main menu, select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose Medical Staff.
   The Staff Maintenance window opens and a Medical Staff link displays under Maintenance node in the navigation tree.

3. Select and complete the fields in the Staff tab , as shown below.

Staff Number	Enter the staff's license number.
Last Name	Enter the staff's last name.
First Name	Enter the staff's first name.
Middle Name	Enter the staff's middle name.
Address	Enter the staff's address. Enter the City, State, Zip, County and Country in the appropriate fields.
Soc. Sec No.	Enter the staff's social security number .

Freeze Payments	Select the check box if you want to freeze the payments for the staff.
Office	From the drop down list, select the staff's primary contact number type and then enter the corresponding contact number.
Home	From the drop down list, select the staff's secondary contact number type and then enter the corresponding contact number.
Beeper #	Enter the staff's beeper or pager number.
Cellular Phone	Enter the staff's cell phone number.
Fax	Enter the staff's fax number.
Emergency Contact #	Enter the phone number to call when you require the medical staff's help in an emergency.
Effective Date	Enter the date from which the entity becomes effective or select the button to select the date from a calendar. Note: By default present date is set as the effective date for any entity, but it can be changed to future or past date.r
Expiration Date	Enter the date from which the entity expires or select the button to select the date from a calendar Expiration date can also be in past or future but it should be greater than or equal to set Effective date set, otherwise an error message is displayed.
Entity Payment Approval Status	Enter the staff's status for payment approval or select the button to select from the Code Selection window. This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.
Payment Approval/Rejected Reason	Select the button to open RISKMASTER Editor and enter a reason for the payment approval/rejection.. This field is displayed only when the Use Entity Payment Approval check box is selected in Utilities.

4. Select and complete the fields in the Staff Info tab , as shown below.

Initials	Enter staff's initials.
Also known as	Enter any other names the staff is known by.
Sex	Enter the staff's gender or select the button to select from the Code Selection window.

Marital Status

Enter the staff's marital status or select the button to select from the Code Selection window.

Date of Birth

Enter staff's date of birth.

Home Address

Enter the staff's address. Enter the City, State, Zip, County and Country in the appropriate fields.

Insurance Policy

Select the ⋯ button to open the Standard Policy Search window and select the staff's insurance policy.

Date of Hire

Enter the date on which the staff was hired.

NPI Number

Enter the National Provider Identification number.

license Number

Enter the staff's license number.

State

Enter the state the staff is licensed in.

license Issue Date

Enter the date on which the staff's license was issued.

license Expire Date

Enter the date on which the staff's license expires.

DEA Number

Enter the staff's Drug Enforcement Agency license number.

DEA Expiration Date

Enter the date on which the staff's Drug Enforcement Agency license expires

5. Select and complete the fields in the Facility Info tab , as shown below.

Staff Status

Enter the code that best describes the staff's employment status or select the button to select from the Code Selection window.

Staff Position

Enter the code that best describes the staff's job or select the button to select from the Code Selection window.

Staff Category

Enter the code that best describes the staff's employment type or select the button to select from the Code Selection window.

Department

Enter the department that employs the staff or select the button to select from the organizational hierarchy.

6. Select the Addresses tab and select the button.
    The Addresses window opens.

7. Complete the fields on the Addresses window, as shown below .

Address1	Enter the staff's address details.
Address2	Enter the staff's address details.
City	Enter the staff's city.
State	Enter the staff's state or select the button to select from the code selection window.
Country	Enter the staff's country or select the button to select from the code selection window.
County	Enter the staff's county.
Zip/Postal Code	Enter the staff's zip/postal code.
Email Address	Enter the staff's email address.
Fax	Enter the staff's fax number.
Primary Address(Mail To)	Select this check box to mark this address as the primary address.
OK	Select to save information on the Addresses window.
Cancel	Select to close the window without saving the record.

8. If your organization defined Supplemental data and complete the Supplementals tab.
9. <u>To enter staff's privilege information</u>, select the Privileges button and open the Staff Privileges window.
10. Complete the fields on the Staff Privileges window ,as shown below .

Category	Enter the privilege category or select the button to select from the Code Selection window.
Type	Enter the field of medicine the privilege is associated with or select the button to select from the Code Selection window.
Status	Enter the current status of the privilege or select the button to select from the Code Selection window.
Start Date	Enter the date on which the privilege comes into effect or select the button to select from a calendar.
End Date	Enter the date on which the privilege expires or select the button to select from a calendar.

11. <u>To enter staff's certification information</u>, select the Certifications button and complete the Staff Certifications window

12. From the toolbar, select the Save button save.

To edit medical staff information

1. Search for the medical staff record you want to edit.
   The record opens in the Staff Maintenance window.

2. Select each of the tabs and edit the information in the fields.
3. To edit staff's privilege information, select the Privileges button and open the Staff Privileges window.
4. To edit staff's certification information, select the Certifications button and open the Staff Certifications window.

5. From the toolbar, select the Save button save.

Tips

To Enter Additional Medical Staff Information

To add staff privilege information

1. Search for the medical staff for whom you want to enter privilege information.
   The appropriate window opens.

2. Select the Privileges button.
   The Staff Privileges window opens.

3. Complete the fields on the Staff Privileges window , as shown below .

Category	Enter the privilege category or select the button to select from the Code Selection window.
Type	Enter the field of medicine the privilege is associated with or select the button to select from the Code Selection window.
Status	Enter the current status of the privilege or select the button to select from the Code Selection window.
Start Date	Enter the date on which the privilege comes into effect or select the button to select from a calendar.
End Date	Enter the date on which the privilege expires or select the button to select from a calendar.

4. From the toolbar, select the Save button save.
5. Select the Back to Staff button.

To add physician certification information

1. Search for the medical staff for whom you want to enter certification information.
   The appropriate window opens.

2. Select the Certifications button.
   The Staff Certifications window opens.

3. Complete the fields on the Staff Certifications window , as shown below .

        Name

                Enter the name of the organization that awards the certification or select the button to select from the Code Selection window.

        Start Date   Enter the date on which the certification comes into effect or select the button to select from a calendar.

        End Date   Enter the date on which the certification expires or select the button to select from a calendar.

4. From the toolbar, select the Save button .
5. Select the Back to Staff button.

Vehicle Maintenance

Vehicle Maintenance

Use the Vehicle Maintenance window to capture details of the vehicles. You can capture detailed information about vehicle units in the system which can then be used at various other places like Auto liability policies and Vehicle Accident claims and so on in RISKMASTER.

To Work with Vehicle Information

You can enter information about vehicles directly into the database .

To add vehicle information

1. From the main menu, select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose Vehicle.
   The Vehicle window opens and a Vehicle link displays under Maintenance node in the navigation tree.

3. Select and complete the fields in the Vehicle Info tab .

        Vehicle ID   Enter the unique identifying number your organization uses to identify the vehicle involved in the accident.

        Vehicle Make   Enter the vehicle's manufacturer name.

        Vehicle Model   Enter the vehicle's model name.

        Vehicle Year   Enter the year in which the vehicle was manufactured.

        State

                Enter the state where the vehicle is registered or select the button to select from the Code Selection window.

        license Number   Enter the vehicle's license plate number.

        Renewal Date   Enter the date on which the vehicle license must be renewed or select the button to select from a calendar.

Purchase Date	Enter the date on which the owner purchased the vehicle or select the button to select from a calendar.
Lease	Select the check box if the owner has leased the vehicle.
Leasing Company	Enter the leasing company's name or select the ••• button to open the Standard Entity Search window and select the leasing company.
Lease Number	Enter the lease contract number.
Lease Term (Months)	Enter the number of months for which the vehicle is leased.
Lease Expiration	Enter the date on which the lease term will end or select the button to select from a calendar.
Lease Amount	Enter the dollar amount the person or company leasing the vehicle pays for the lease.
Original Cost	Enter the vehicle's original purchase cost.

4. Select and complete the fields in the Vehicle Detail tab .

Unit Type	Enter the code that best describes the vehicle type or select the 🔍 button to select from the Code Selection window.
Department	Enter the department in-charge of the vehicle or select the search button to select from the organizational hierarchy.
Weight	Enter the vehicle's weight in pounds.
Insurance Info	Enter additional vehicle insurance information or select the 📝 button to open the RISKMASTER Editor and enter the information.
Deductible	Enter the dollar amount for insurance deductible.
Disposal Date	Enter the date on which the owner disposed the vehicle or select the button to select from a calendar.
Last Service Date	Enter the date on which the vehicle was last serviced or select the button to select from a calendar
Type of Service	Enter a description of the service or select the 📝 button to open the RISKMASTER Editor and enter the service information.

5. If your organization defined Supplemental data, and complete the Supplemental window.

6. From the toolbar, select the Save button 💾.

To edit vehicle information

1. Search for the vehicle record you want to edit.
    The record opens in the Vehicle window.

2. Select each of the tabs and edit the information in the fields.
3. To edit unit inspection information, select the Inspection button and open the Unit Inspection window.

4. From the toolbar, select the Save button [icon].

[Tips]

To Enter Additional Vehicle Information

To add vehicle inspection information
1. Search for the vehicle for which you want to enter inspection information.
    The appropriate window opens.

2. Select the Inspections button.
    The Unit Inspection window opens.

3. Complete the fields on the Unit Inspection window, as shown below .

Inspection Date	Enter the date on which the vehicle was inspected or select the button to select from the calendar.
Inspection Result	Enter a description of the inspection results or select the [...] button to open the RISKMASTER Editor and enter the description.

4. From the toolbar, select the Save button [icon].
5. Select the Back to Vehicle button.

To view vehicle accident information
1. Search for the vehicle for which you want to view accident information.
    The appropriate window opens.

2. Select the Accidents button and displays a list of accidents in which the vehicle was involved.
3. Select the link for the vehicle accident.
    The Vehicle Accident window opens.

XML Import

To Import XML File

Using this feature you can import XML files in RISKMASTER. However you should create XML file before importing it.

> Note: In case you try to import an XML document that already exists , then the import request will be rejected.

1. From the main menu, choose Utilities.
2. From the Utilities menu, choose Technicians.
3. From the Technicians menu, choose XML Import.
4. From the XML Import menu, choose XML Import.
    The Import XML window opens.

5. In the 'Select the XML Files to be uploaded' field, select the Browse button to navigate to the XML file you want to upload.
6. Select the Upload files button to upload the XML files in RISKMASTER.

To Generate XML Import File

1. From the main menu, choose Utilities.
2. From the Utilities menu, choose Technicians.
3. From the Technicians menu, choose XML Import.
4. From the XML Import menu, choose the XML Import Template Generation.

   The XML Import Template Generation window opens.

5. Select the option for the type of records you want to generate the XML template for.

   The selected record type opens in a tree structure.

6. Select the check box next to Import node to expand the tree.
7. In the tree select the check box for all the record which you want to include in the template.
8. Enter the number of events/attachments/ WPA diary entries you want to include in the import template.
9. Select the Refresh Tree button to re-create the tree structure as per the number of records entered.
10. Select the Generate Template button.

    The XML template is generated and opens in a browser window.

XML Import Overview

This feature enables users to upload one or multiple XML documents in order to import Diary, Entity, and Event/Claim records including the associated records like Claimant, Adjuster, Units etc into .

Users should create their XML files based on their requirements. The XML file should be ready before users use the XML Import utility to create records in RISKMASTER. You can only perform actions using XML import file for which you have enough privileges in Security Management System.

Using the XML Import Template Generation window you can create XML templates for importing data into RISKMASTER.

Catastrophe Maintenance

Catastrophe Processing Overview

Catastrophe Processing feature enables you to track and record catastrophe claims. You can create catastrophe records and enter information for catastrophe loss. Catastrophes can be created based on multiple types. You can link claims to catastrophes.

Additionally you can search for Catastrophe records using Search menu and also create Customized Catastrophe search using Query Designer .

You can also create Powerviews, Word Merge based on Catastrophe fields. Catastrophe information is also reported in executive summary, quick summary, record summary for a claim record.

You can add Catastrophe Codes on the Table Maintenance window and assign access rights for catastrophe records in Module Access in Security Management System.

> Note: This feature is available in both carrier and traditional RMX.

Catastrophe Window

To open

- From the main menu, select Maintenance.

- From the Maintenance menu, choose Catastrophe.

Field definitions

Loss Start Date   Enter the start date catastrophe loss or select the button to select the date calendar.

Loss End Date	Enter the end date for catastrophe loss or select the [calendar icon] button to select the date from calendar.
Catastrophe Type	Select the [search icon] button to select the required catastrophe type.
Country	Select the [search icon] button to select country in which catastrophe occurred.
Catastrophe Number	Enter the number assigned to catastrophe by ISO.
Catastrophe States	Select the states in which catastrophe occurred. Note : You can select multiple states in this field.
County	Select the county where the catastrophe loss occurred. Note: You can select multiple counties in this field.
Causes of Loss	Select the [search icon] button to select the suitable cause due to which loss occurred. Note: You can select multiple causes in this field.
Loss Location	Select the [editor icon] button to open RISKMASTER Editor and enter the location where the loss occurred. You can add detailed information about the location of loss in this field.
Description	Select the [editor icon] button to open RISKMASTER Editor and enter the description of the catastrophe loss in this field.
Comments	Select the [editor icon] button to open RISKMASTER Editor and enter additional information about the catastrophe loss.
Total Number of Claims	Displays the number of claims to which the selected catastrophe loss record is attached.

To Attach Catastrophe Record to a Claim

1. Search and open the claim record you want to attach catastrophe loss record to.

2. On the Claim window: Claim information tab, from the Catastrophe Type field, select the [search icon] button to select the required type of catastrophe.
   Note: **The catastrophe can be of various types like**

   - Death
   - Ice
   - Earthquake-
   - Multiple Vehicle Accident
   - Fire
   - Theft

- Flood

- Tornado

- Hail

- Workers Compensation Accident

- Hurricane

- Windstorm

The Automatic Catastrophe Attach window opens and displays the catastrophe loss records of selected type that meet the criteria (Event Date must lie between Loss Start Date and Loss End Date) existing in the system.

Automatic Catastrophe Attach			
Yes ⦿ No ○ Not known at this time ○			
Catastrophe No.	**Loss Start Date**	**Loss End Date**	**Type**
○ werwesdfasdasdfasdas	6/15/2012		EQ Earthquake
Submit Cancel			

3. Select the required option as shown in table below:

Yes	Select the option to attach the Catastrophe to the claim and Catastrophe Number field on the claim window is populated with corresponding catastrophe number.
No	Select the option to not attach the Catastrophe and never ask the question again on this claim.
Not Known at this time	Select the option if you are not sure to attach the catastrophe at this time however you want RISKMASTER application to prompt you to choose to attach the catastrophe to the claim when you open the claim next time . As long as "Not Know at this time" option is selected Catastrophe window opens automatically when the particular claim is opened again next time.

4.

5. If you want to attach catastrophe to the claim, select Yes option and then select option for the Catastrophe record you want to attach to claim.

6. Select the Submit button.

 No. of the selected record displays in the Catastrophe Number field on the Claim window..

To Enter Catastrophe Information

1. From the main menu, choose Maintenance.

The Maintenance menu opens.

2. From the Maintenance menu, choose Catastrophe.

The Catastrophe window opens.
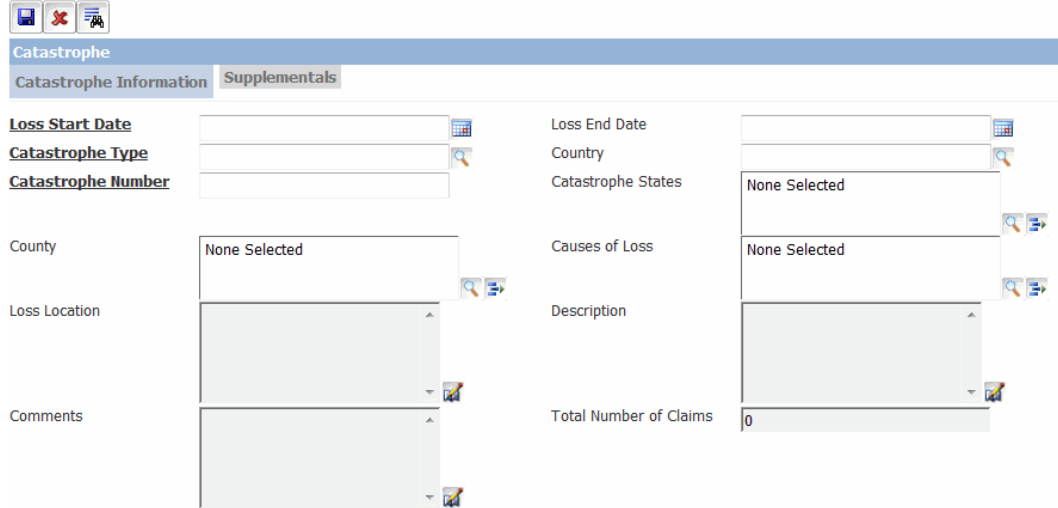
3. Complete the fields on the Catastrophe Information tab based on the table below.

Loss Start Date	Enter the start date catastrophe loss or select the ▦ button to select the date calendar.
Loss End Date	Enter the end date for catastrophe loss or select the ▦ button to select the date from calendar.
Catastrophe Type	Select the 🔍 button to select the required catastrophe type.
Country	Select the 🔍 button to select country in which catastrophe occurred.
Catastrophe Number	Enter the unique number assigned to catastrophe by ISO.
Catastrophe States	Select the states in which catastrophe occurred. Note : You can select multiple states in this field.
County	Select the county where the catastrophe loss occurred. Note: You can select multiple counties in this field.
Causes of Loss	Select the 🔍 button to select the suitable cause due to which loss occurred. Note: You can select multiple causes in this field.
Loss Location	Select the 🖊 button to open RISKMASTER Editor and enter the location where the loss occurred. You can add detailed information about the location of loss in this field.
Description	Select the 🖊 button to open RISKMASTER Editor and enter the description of the catastrophe loss in this field.
Comments	Select the 🖊 button to open RISKMASTER Editor and enter additional information about the catastrophe loss.

| **Total Number of Claims** | Displays the number of claims to which the selected catastrophe loss record is attached. |

4. From the toolbar, select the ![save] button.

To Search a Catastrophe Record

1. From the main menu, select Search.

   The Search menu opens.

2. From the Search menu, select Catastrophe.

   The Catastrophe Standard Search window opens.
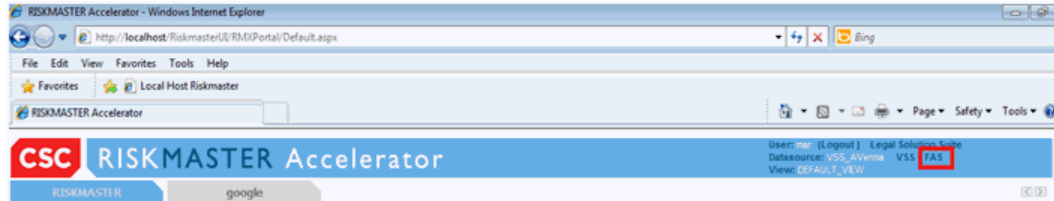
3. Enter the search criteria

Note: You can search catastrophe records based Loss Start Date, Loss End Date, Catastrophe Number, Catastrophe Type, Total Number of Claims, Loss Location and Country fields.

4. Select the Submit Query button.

You can also create customized Catastrophe Search using Query Designer in Utilities.

Medical Case Management

Medical Case Management Overview

Use the Medical Case Management module to enter and manage medical cases for claimants. You can assign case managers for cases and enter medical case related information such as accommodations, vocational rehabilitation, treatments and savings.

RISKMASTER uses Presley Reed's Medical Disability Advisor (MDA) guidelines to estimate the length of disability, in terms of restricted days and lost days. MDA guidelines address the need to improve communication during a disability life cycle, and to calculate Return to Work (RTW) in an industry accepted and uniform way.

MDA guidelines give an estimate of the approximate time required for workers to return to work after various work-related injuries and treatments. The guidelines are specific to the injured part (e.g. fracture, tendon rupture, and so on.) and take into account that the worker need not lose time away from work if modified or alternate job duties are available or work duties may be safely performed using uninjured limbs, without compromising treatment.

Tips

To Activate Medical Disability Advisor in Utilities

1. From the main menu, select Utilities.
2. From the Utilities menu, select Managers.
   The Managers menu opens.

3. From the Managers menu, select Medical Info Setup.
   The Medical Info Setup window opens and a Medical Info Setup link displays in under the Utilities node in the left navigation tree.

4. In the MDA DSN Name field, enter the Medical Disability Advisor data source name.
5. In the User ID field, enter a user ID.
6. In the Password field, enter the password for the user ID you entered.
7. From the MDA Help File field, select the search button.
   A Browse window opens.

8. Navigate to the directory where the Medical Disability Advisor help file is located, and select the help file.
9. In the Browser select Open.
   The file path for the MDA help file is entered into the MDA Help File field.

10. Select Save.

Tips

To Enter a Medical Case

1. Search for the Workers' Compensation or Non-Occupational claim, you want to set up of a medical case for.
2. On the Workers' Compensation window or the Non-Occupational Claims window, select the Employment Info tab.
3. From the Job Classification field, select the search button and select a job classification code.
4. To enter medical information, select and enter information on the Medical Info tab.
5. Select and enter information on the Case Mgt/RTW tab , as shown below .
4.

Primary Case Manager Summary

Case Manager	Displays the primary case manager for the case. You select the primary case manager on the Case Manager History window .
Referral Date	Displays the date on which the referral was issued. You enter this date on the Case Manager History window .
Case Status	Displays the code for the case status. You enter this information on the Case Manager History window .
Days with Case Mgr.	Displays the number of days the case was with the case manager, based on the Date Closed.
RTW Status	Enter the code that best describes the return to work status for the claimant or select the [🔍] button to select from the Code Selection window.

Restricted Work

Current Restricted Days?	• This check box is checked if you have not entered an actual last restricted day on the Restricted Days window. • This check box is unchecked if you entered an actual last day on the Restricted Days window.
Est. Release from Rst.	Enter the estimated date on which the claimant will be released from work restrictions . The minimum, optimum and maximum restricted work durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower section of the window.
Actual Last Rst Day	Displays the last day you entered on the Restricted Days window, if you set the RTW Status as Released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the First Day Restricted you entered on the Restricted Days window, the Estimated Release from Restriction. date and the work week.
Total Restricted Days	Displays the total number of restricted days based on the First Day Restricted and the Last Day Restricted you entered on the Restricted Days window. If there is no Last Day Restricted, then the total number of restricted days is based on today's date. The previous durations on the Restricted Days window are also considered in this calculation.

MDA Durations-Days/Date	• **Job Classification**: displays the job classification you selected on the Employment Info tab.
	• **Minimum**: displays the minimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD-9 code, MDA topic and MDA factor you selected.
	• **Optimum:** displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD-9 code, MDA topic and MDA factor you selected.
	• **Maximum**: displays the optimum number of restricted days and the related return to work day based on the Medical Disability guidelines for the ICD-9 code, MDA topic and MDA factor you selected.

Work Loss

Current Work Loss?	• This check box is checked if you have not entered a Return To Work day on the Lost Days window.
	• This check box is unchecked if you entered a Return To Work day on the Lost Days window.
Est. Return To Work	Enter the estimated date on which the claimant can return to work.

The minimum, optimum and maximum work loss durations for the job classification, ICD-9 code, MDA topic and MDA factor you selected are displayed in the lower half of this section.

Actual RTW Date	Displays the return to work date you entered on the Lost Days window, if you set the RTW Status as released.
Est. Len. of Disability	Displays the estimated number of days on disability. This is calculated based on the Last Work Day you entered on the Lost Days window, the Estimated Return to Work date and the work week.
Total Lost Days	Displays the total number of lost days based on the Last Work Day and the Return to Work date you entered on the Lost Days window. If there is no Return to Work date, then the total number of lost days is based on today's date. The previous durations on the Lost Days window are also considered in this calculation.
MDA Durations-Days/Date	• **Job Classification**: displays the job classification you selected on the Employment Info tab.
	• **Minimum**: displays the minimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD-9 code, MDA topic and MDA factor you selected.
	• **Optimum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD-9 code, MDA topic and MDA factor you selected.
	• **Maximum**: displays the optimum number of lost days and the related return to work day based on the Medical Disability guidelines for the ICD-9 code, MDA topic and MDA factor you selected.

5.

6.   To enter work restriction details, select the Restrictions button.

7.   To enter lost days details, select the Work Loss button.

8.   To enter case manager information, select the Case Managers button, and complete the Case Manager History window.

9.   To enter accommodation information, select the Accommodation button, and complete the Accommodations window.

10.   To enter vocational rehabilitation information, select the Vocational Rehab. button, and complete the Vocational Rehabilitation window.

11.   To enter medical management savings, select the Medical Mgt Savings button, and complete the Medical Management Savings List window.

12.   From the toolbar, select the Save button .

To Enter Case Manager Information

1. Search for the Workers' Compensation or Non-Occupational claim , you want to enter case manager information for.

2. On the Workers' Compensation window or the Non-Occupational Claims window, select the Medical Info tab.

3. On the Medical Info tab, select the Case Manager button.

   The Case Manager History window opens and displays a list of existing case manager records..

4. To add a new case manager, select Add New.

   The Case Manager History window opens.

5. From the Case Manager field, select the button and search for the case manager you want to assign to the case.

Note: You must have a person of the type Case Manager setup in the database .

6. Select the Primary Case Manager check box, if you want the case manager to be the current or primary case manager.

7. Complete the fields on the Case Manager History window , as shown below

Case Manager	Select the button the open the Standard Entity Search window and select the primary case manager.
Referral Type	Enter the code that best describes the referral type or select the button to select from the Code Selection window.
Referral Date	Enter the date on which the referral was issued or select the button to select from a calendar.
Referred To	Select the button the open the Standard Entity Search window and select the entity to which the entity is referred to.
Referral Reason	Enter the code that best describes the reason for the referral or select the button to select from the Code Selection window.

Case Status

Enter the code that best describes the case status, or select the button to select from the Code Selection window.

Date Closed

Enter the date on which the case was closed by the case manager or select the button to select from a calendar.

Days with Case Mgr.

Displays the number of days the case was with the manager, based on the Date Closed date.

Primary Case Manager

Select the check box if you want to assign the case manager as the primary or current case manager.

Provider Group

Displays the provider for the case.

Savings Type

Displays the medical management savings type for the case.

Transaction Type

Displays the transaction type for the case.

Savings

Displays the savings for the case.

Summary

Displays additional information related to the case.

8. From the toolbar, select the Record Summary button to open the Record Summary window.

9. From the toolbar, select the Enhanced Notes button to open the Enhanced Notes for the associated parent claim record.

10. From the toolbar, select the Save button .

Tips

To Enter Medical Case Management Savings Information

1. Search for the Workers' Compensation or Non-Occupational claim , you want to enter case management savings for.
2. On the Workers' Compensation window or the Non-Occupational Claims window, select the Medical Info tab.
3. On the Medical Info tab, select the Medical Mgt Savings button.
   The Medical Management Savings List window opens.

4. From the Medical Management Savings List window, select Add New.

5. From the Provider Group field, select the search button and search for the provider.
6. Complete the fields on the Medical Management Savings window , as shown below .

   Provider Group

   Select the button to open the Standard Entity Search window and select an existing provider.

Note: You can enter a new provider group on the Entity Maintenance window, as Other People entity type.

Treatment Provider	Enter the treatment provider name.
Case Manager	Select the ⁝⁝⁝ button to open the Standard Entity Search window and select the case manager assigned to the case.
Savings Type	Enter the code that best describes the type of savings or select the 🔍 button to select from the Code Selection window.
Transaction Type	Enter the code for the transaction type or select the 🔍 button to select from the Code Selection window.
Summary	Select the ✏ button to open the RISKMASTER Editor and enter additional information about the medical management savings.
Quoted Amount	Enter the amount that was quoted for the service.
Agreed Amount	Enter the amount that you agreed to pay for the service.
Savings	Displays the difference between the quoted amount and the agreed amount.

7.   From the toolbar, select the Save button 💾 .
8.   Close the Medical Management Savings window.

Tips

To Enter Medical Case Management Accommodation Information

1.   Search for the Workers' Compensation or Non-Occupational claim , you want to enter case management accommodation information for.
2.   On the Workers' Compensation window or the Non-Occupational Claims window, select the Case Mgt/RTW tab.
3.   On the Case Mgt/ RTW tab, select the Accommodation button.
     The Accommodations window opens.

4.   Complete the fields on the Accommodations window , as shown below .

Accomm. Status	Enter the code that best describes the accommodation status or select the ⁝⁝⁝ button to select from the Code Selection window.

Accomm. Scope	Enter the code that best describes whether the accommodation is temporary or permanent or select the [🔍] button to select from the Code Selection window.
Accomm. Type	Enter the code that best describes the type of alternative job with respect to the employee's current job or select the [🔍] button to select from the Code Selection window.
Position	Enter the code that best describes the employee's job position or select the [🔍] button to select from the Code Selection window.
Department	Enter the department or select the [🔍] button to select from the Org. Hierarchy window.
MMI Date	Enter the Maximum Medical Improvement date, which is the estimated date on which the employee will reach maximum expected recovery or select the button to select from a calendar.
Accomm. Requested	Enter the date on which the employee requested the accommodation or select the button to select from a calendar.
Accomm. Offered	Enter the date on which the accommodation was offered to the employee or select the button to select from a calendar.
Accomm Accepted	Enter the date on which the employee accepted the accommodation or select the button to select from a calendar.
Net Cost of Accomm.	Enter the net cost of the employee's work modification to the employee's organization.
Restrictions	Select the [✎] button to open the RISKMASTER Editor and enter the employee's current work restrictions.
Accommodations	Select the [✎] button to open the RISKMASTER Editor and enter additional information about the accommodation.
Back to Accommodation Lists	Displays the existing and past accommodations.

5. From the toolbar, select the Record Summary [R] button to open the Record Summary window.

6. From the toolbar, select the Enhanced Notes [📝] button to open the Enhanced Notes for the associated parent claim record.

7. From the toolbar, select the Save button [💾].

To Enter Medical Case Management Treatment Plan

1. Search for the Workers' Compensation or Non-Occupational claim, you want to enter treatment plan for.
2. On the Workers' Compensation window or the Non-Occupational Claims window, select the Medical Info tab.
3. On the Medical Info tab, select the Treatment Plan button.
   The Treatment Plan/Medical Chronology window opens.

4. On the Treatment Plan/ Medical Chronology window, select Add New.
   The Treatment Plan/Utilization Review window opens.

5. Select and complete the fields on the Treatment Plan tab, as shown below.

   Plan Status

   Enter the code that best describes the status of the treatment plan or select the button to select from the Code Selection window.

   Referral Type

   Enter the code that best describes the type of referral or select the button to select from the Code Selection window.

   Requested Treatment

   Select the button to open the RISKMASTER Editor and enter the treatment requested in the referral.

   Treatment Type

   Enter the code that best describes the type of treatment or select the button to select from the Code Selection window.

   Procedure

   Enter the code that best describes the type of procedure or select the button to select from the Code Selection window.

   Reason

   Select the button to open the RISKMASTER Editor and enter a detailed description of the reason for the treatment.

   Date Requested   Enter the date on which the treatment was requested.

   Requested No. of Visits   Enter the requested number of visits for the treatment.

   Approved No. of Visits   Enter the approved number of visits for the treatment.

   Authorized Date Range   Enter the from and to dates in which the patient's can visit for approved treatment.

   Approved Treatment

   Select the button to open the RISKMASTER Editor and enter a detailed description of the approved treatment.

Approved By

Select the ··· button to open the Standard Entity Search window and search for the physician or person who approved the treatment.

Date Approved

Select the date on which the treatment was approved or select the button to search from a calendar.

Days from Request to Approval

Displays the number of days lapsed between the date on which the treatment was requested and the date on which the treatment was approved.

Saved Visits

Displays the difference between the number of approved visits and the number of actual visits.

6. Select and complete the fields on the Provider tab, as shown below.

Provider Group

Select the ··· button to open the Standard Entity Search window and search for an existing provider.

> You can enter a new provider group on the Entity Maintenance window, as Other People entity type.

Open

Select the button to open the Entity Maintenance window for the Provider Group.

Provider Phone

Displays the phone number for the provider group.

Treatment Provider

Displays the type of treatment for which the selected group provides.

7. Select and complete the fields on the Review tab, as shown below.

Review Type

Enter the code that best describes the review, or select the button to select from the Codes Selection window.

Reviewed By

Select the ··· button to open the Standard Entity Search window and search for a treatment plan reviewer.

Date Referred

Enter the date on which the treatment plan was referred for review.

Date Reviewed

Enter the date on which the treatment plan was reviewed.

Days for Review

Displays the number of days elapsed between the referral and review dates.

Hours Billable

Enter the number of billable review hours.

8. Select and complete the fields on the Appeal tab, as shown below.

Date Appealed

Enter the date on which a review of the treatment plan was appealed.

Appeal Decision

Enter the code that best describes the appeal decision or select the [🔍] button to select from the Codes Selection window.

9. Select and complete the fields on the Criteria tab, as shown below.

Criteria

Enter the code that best describes the guidelines for the treatment or select the [🔍] button to select from the Codes Selection window.

10. From the toolbar, select the Save button [💾].

Tips

To Enter Medical Case Management Vocational Rehabilitation Information

1. Search for the Workers' Compensation or Non-Occupational claim, you want to enter vocational rehabilitation information for.
2. On the Workers' Compensation window or the Non-Occupational Claims window, select the Case Mgt/RTW tab.
3. On the Case Mgt/RTW tab, select the Vocational Rehab button.
   The Vocational Rehabilitation window opens.

4. Complete the fields on the Vocational Rehabilitation window , as shown below .

Rehab. Type

Enter the code that best describes the rehabilitation type or select the [🔍] button to select from the Code Selection window.

Rehab. Status

Enter the code that best describes the rehabilitation status or select the [🔍] button to select from the Code Selection window.

Provider Group

Select the [---] button to open the Standard Entity Search window and select an existing provider.

Note: You can enter a new provider group on the Entity Maintenance window, as Other People entity type.

Plan Description

Select the [✏️] button to open the RISKMASTER Editor and enter a detailed description of the vocational rehabilitation plan.

Occupation Proposed

Enter the proposed occupation.

Outcomes

Enter the code that best describes the employee's readiness to return to work or select the [🔍] button to select from the Code Selection window.

Start Date

Enter the date on which the vocational rehabilitation plan will start or select the button to select from a calendar.

End Date	Enter the date on which the vocational rehabilitation plan ended or select the button to select from a calendar.
Est. Cost of Plan	Enter the estimated cost of the vocational rehabilitation plan.
Act. Cost of Plan	Enter the actual cost of the vocational rehabilitation plan.
Difference	Displays the difference between the estimated and the actual cost.
Cost if Buy Out	Enter the cost to buy out the employee's vocational rehabilitation plan.
State Refund	Enter the State Refund for the vocational rehabilitation plan.

5. From the toolbar, select the Record Summary [R] button to open the Record Summary window.

6. From the toolbar, select the Enhanced Notes [icon] button to open the Enhanced Notes for the associated parent claim record.

7. From the toolbar, select the Save button [icon].

8. Close the Vocational Rehabilitation window.

[Tips]

To Estimate the Length of disability based on Medical Disability Advisor

1. Search for the Workers' Compensation or Non-Occupational claim, you want to estimate length of disability for.
2. On the Workers' Compensation window or the Non-Occupational Claims window, select the Employment Info tab.

3. From the Job Classification field, select the [icon] button to open the Codes Selection window and select the code that best describes the type of job.
4. Select the Medical Info tab.

5. From the (ICD-9) Primary Diagnosis field, select the [icon] button.
   The Primary Diagnosis History window opens.

6. From the ICD9 (Primary Diagnosis) field, select the [icon] button to open the Code Selection window select a valid ICD9 code.
7. On the Primary Diagnosis History window, select OK.

8. From the MDA Topic field, select the [icon] button.
   The MDA Topic window opens.

9. Select the disability topic you want.
10. Select OK.
    RISKMASTER populates the MDA Topic and MDA Factor fields.

11. Select the Case Mgt/RTW tab.

In the Restricted Work tab, under MDA Durations, the Minimum, Optimum and Maximum lengths of disability are listed in days for the job classification, ICD-9 code, MDA topic and MDA factor you selected.

To Configure Executive Summary Medical Case Management Information

1. From the main menu, select Reports.

   The Reports menu opens.

2. From the Reports menu, choose Executive Summaries.

   The Exec. Summaries menu opens.

3. From the Executive Summaries menu, choose Configuration.

   The Executive Summary Configuration window opens and a Configurations link displays under the Reports node in the left navigation tree.

4. Select the Claims WC tab.
5. Select the Medical Case Management-related check boxes that you want to include on the executive summary.
6. Select Save Configurations button.

   When you print the executive summary the options you selected are included on the executive summary.

Tips

To Open the Medical Disability Advisor Help File

1. Search for the Workers' Compensation or Non-Occupational claim, you want to enter case management accommodation information for.

   The appropriate Workers' Compensation window or Non-Occupational Claims window opens.

2. Do one of the following:

   - On the Medical Info tab, from the MDA Topic field, select the Disability Guidelines button.

   - On the Case Mgt/RTW tab, select the Medical Disability Guideline button.

   A .html file opens and displays the guidelines based on the topic in the MDA Topic field.

Note: You set the file path for the MDA help file in Utilities .

Outlook Integration

To E-mail Claim Attachments From RISKMASTER Using Outlook

When you send email using Outlook you will be able to see your outlook address book. Emails sent using will be visible in Outlook's Sent Items folder.

1. Search and open the claim for which you want to e-mail attachments.

2. On the required claim window, from the toolbar select the Attachments button.

   The Document Management window opens.

3. From the Claim Attachments list, select the check box against the required file which you want to e-mail using Outlook.

4. Select the **E-Mail Using Outlook** button.

Note: Microsoft Outlook should be open when you try to send attachments from using Outlook.

The Outlook new message window opens with the Claim Number in the Subject of the e-mail.

5. Compose the e-mail message and select the Send button.

The selected file is send as an e-mail through Outlook.

Note: If the attachment size is greater than the allowable attachment size, when you select the Send button, you will get a prompt telling you the file size is too large. The allowable file size is set up on the General System Parameters window in Utilities.

RISKMASTER Outlook Integration

The RMX Outlook Integrated feature offers a two way interaction between Microsoft Outlook and RISKMASTER. With this you can attach e-mails and files to the claims directly in RISKMASTER Accelerator. When you send e-mails through , the Outlook client will open up with attachments pre-loaded in.

When the Plug-In is installed, two new buttons are available in Users Outlook client New RMX Email and Upload Item(s) to RMX

> Note:
>
> Exchange server web service API should be available on the system to interact with the web server.

To Upload an E-mail from Outlook

To upload an E-mail from Outlook to , do one of the following:

- [Send as email attachment from Outlook](#)

- [Attach directly from Outlook](#)

> Note: When you send email using Outlook you will be able to see your Outlook address book. Emails sent will be visible in Outlook's Sent Items folder.

Send as Email Attachment from Outlook
1. Open Microsoft Outlook.
2. From the MS Outlook window, compose a new e-mail.
   The Compose Message window opens.

3. In the To.. and Cc.. field, enter the e-mail address of the person you want to send the e-mail to.
4. In the Subject field, enter the subject of the e-mail.
5. Select the Send button.
   A confirmation message window opens if the prompt level settings have been done while configuring MS Outlook.

6. Select the Yes button if you want to upload the e-mail to .
   The ClaimInfo window opens.

7. In the Claim/ Event Number field, enter the claim or event number to which you want to upload the e-mail.

8. Select the Claim or Event option, based on whether you want to attach email to claim or event information.

9. Select the Upload button.

   The e-mail is sent to the e-mail address specified in the To/ Cc field and it is also attached to the specified claim number in .

Attach Directly from Outlook
1. Open Microsoft Outlook.
2. From the Inbox, select the e-mail which you want to attach to a claim or event in RISKMASTER.
3. Select the Upload Mail button.
   The ClaimInfo window opens.
4. In the Claim Number field, enter the claim number to which you want to attach the e-mail.
5. From the Format drop down list, select the format of the file that you want to attach to RISKMASTER through e-mail.
6. Select the Send Attachments to RMX check box, to send attachments in the e-mail to RISKMASTER.
7. Select the Upload button to attach the e-mail to the specified claim.

To Attach an E-mail to a Claim from Outlook

1. Open Microsoft Outlook.

2. On the Microsoft Outlook window, select the **New RMX Email** button.
   The MS Outlook New Message window opens.

3. Compose the e-mail message and enter the recipients e-mail address.
4. In the Claim No. field, enter the claim number to which you want to attach the e-mail.
5. Select the Send Attachments to RMX check box, to send attachments in e-mail to RISKMASTER.
   > Note: The size of attachment can be of maximum 50 MB.

6. From the Format drop down list, select the format of the file you want to attach to RISKMASTER through e-mail.

7. Select the Send button.
    The e-mail is attached to selected claim in RISKMASTER.

Media Content Management

Media Content Management Overview

AcroSoft Corporation specializes in the development and deployment of the Insurance Content Management (ICM) system, which includes content management, electronic imaging, and work flow management capabilities. AcroSoft's Insurance Content Management® (ICM) enables you to create, manage, access and distribute documents, while ensuring the privacy of your clients and the protection of your company.

RISKMASTER 's document attachment feature is integrated with AcroSoft's Insurance Content Management, and is known as Media Content Management (MCM). MCM provides a platform for integrating all the content, such as forms, scanned paper documents, faxes, emails, word processing documents (TIFF, DOC), spreadsheets (XLS), XML, and audio and video clips, that is dispersed throughout the company.

Easier and quicker access to information helps to simplify business processes and eliminate error. MCM's customized cabinets and indexing, enable you to organize information the way you want. As an optional component of RISKMASTER, MCM enables claims and risk management departments to take advantage of digital imaging technology and provides single point of access to notices of loss, medical bills, police reports and other documents.

Key Features

Media Content Management (MCM) helps organizations streamline the process of organizing and managing content. MCM allows you to:

- **Create and add documents:** You can import existing files, use templates, print to file, scan and enter documents through a Web URL. All documents are associated with the event, claim, user and policy .

- **Create and modify subfolders:** You can manually create, update or delete subfolders and adjust the document type.

- **Search for documents:** You can search for event or claim folders based on complete or partial search criteria, and easily locate and retrieve documents.

- **Index and Re-Index Folders:** Re-indexing lets you move an entire event or claims folder and its contents to another folder or create a new event or claim folder while re-indexing content. Indexing is quick and easy with links to events, claims, users and policies.

- **Delete Documents:** Recycle bins store all deleted documents until you want to permanently delete these documents.

You can also expand the capabilities of Media Content Management with additional features to meet the needs of a wide range of claims and risk management organizations:

- **Scan Plus:** Designed to support high-volume document capture and processing, this add-on component provides image manipulation and cleanup capabilities including rescan/insert, window/delete window, save rotated window, deskew/despeckle and border removal. Bar coding enables auto indexing of document types or claim data and distinguishes between documents.

- **Directory Monitor:** Useful for network copies, fax servers, FTP files and documents produced by third-party applications, this add-on component helps monitor network folders to import new documents into the system, and it parses file names for key data to enable auto-indexing.

MCM User Interface

Use this button	Button name	To open
	Add Sub-Folder	Add Sub-Folder window
	Modify Sub-Folder	Modify Subfolder window
	Move Document(s)	Move Documents window
	Upload Document(s)	Upload Documents window
	Document Properties	Document Properties window
	Send Document(s)	Send Documents window
	Reindex Folder	Reindex Folder window
	Reindex Document(s)	Reindex Documents window
	Delete Document(s)	Delete Documents window
	Delete Sub-Folder	Delete Subfolder window
	Search Again	Folder Search window

MCM Image Viewer User Interface

Use the MCM Image Viewer to view document images and digital photographs.

Use this button	Button name	Select to
	Zoom In	Increase the window magnification.
	Zoom Out	Decrease the window magnification.
	Fit to window	Resize the window to fit entirely in the document pane.
	Fit 100%	Resize the window to display at actual size or at 100% magnification.

	Previous window	Open the previous window.
	Next window	Open the next window.
	Rotate Clockwise	View the window at a rotation of 90º to the right.
	Rotate Counterclockwise	View the window at a rotation of 90º to the left.
	Pan Window	Adjust the magnification and position of the view area, to match the area in an adjustable rectangle in the Pan window's thumbnail view of the window.
	Print Setup	Configure print settings.
	Print	Print the current document to the default printer.
	Go To window	Enter a window number and select OK to open the window.
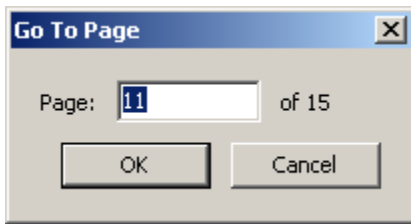
Go To Page

Page: `11` of 15

OK   Cancel

Annotations Toolbar

	View Annotations	View the annotations on the image.
	Hide Annotations	Hide the annotations on the image.
	Print Annotations	Print the annotations with the image.
	Don't Print Annotations	Print the image without the annotations.

Administrative Tool Overview

Acrosoft's Administration Tool enables you to update cabinet, index class, and user options for Media Content Management (MCM). A cabinet is a user-defined comprehensive view of various electronic file formats. Folders in the cabinet have specific index keywords.

You can use the Administration (Admin) Tool to set up new users, update passwords, create and assign security profiles. You also use this tool to add, modify, and delete document types and subfolders.

When you install MCM, Acrosoft automatically creates an Administrator ID (ASADMIN), the AS Object Server and a RISKMASTER cabinet with four index classes:

- General

- Policy

- Standard

- User

Use the ASADMIN ID to log into MCM and then create user IDs and passwords, that match RISKMASTER users ID and passwords, to enable users to log into the RISKMASTER cabinet. When you update RISKMASTER passwords, the Admin Tool also updates the MCM passwords.

After you create users you need to assign them to the AS Object Server (asobjsrv), and the RISKMASTER cabinet.

> Note: CSC recommends that you do not modify or delete the Object Server and cabinet created during the MCM installation.

After you assign users to the RISKMASTER cabinet, you need to assign existing security profiles, or create new security profiles for users and/or user groups. Without a security profile, a user cannot use MCM.

In the Standard index class, Acrosoft creates a number of subfolders and document types during installation. These include, Correspondence, Discovery, Estimate, Expenses, Investigation, Invoice , Loss Notice, Medical Bills, Other, Photos, Pleadings, Police Report, Salvage, Scheduled Items, Summons and Complaint, and Titles. Document types display on the Index window based on the index class you select. You can set subfolders for automatic creation in every new folder, or display a shortcut list of subfolders available so that you can use an existing sub-folder.

You can use the Admin tool to create, modify, or delete document types for individual index classes, and subfolders.

> Note: CSC recommends updates to subfolders, as well as document types, as the only modifications you can make to the pre-defined index classes in the MCM cabinet.

Documents and Folders

Annotations Overview

Annotations are comments or explanatory notes or an emphasized display area on a document or image. In MCM, you can use annotations to add information or emphasis to a document image or a digital image, as it displays in the MCM Image viewer. For example, you can use the text tool to display notes on your image files, or use the highlight tool to emphasize an area on the image. You can print the annotations when you print your document, and also turn on of off the annotations display. The annotations do not alter the original image.

Annotation Type Tools

You can use the following annotation types anywhere on the image that displays in MCM Image Viewer:

> Note: To specify the line width, color, and other properties of an annotation, right click the annotation, choose Properties, and in the Properties window, set the desired options. To resize or move the annotation, left click the

Use this button	Button name	Select to add to your image
	Arrow	An arrow of a color and thickness of your choice.
	Box	A box of a size and fill color, and border line color and thickness of your choice.

Note: You can use a box to create a border for the image.

| | Highlight | A transparent block to highlight or emphasis an area on the image. The default highlight color is yellow but you can select another color. |
| | | |

Note: Only a black colored highlight is opaque.

| | Free Hand Line | A free-form line of a color and thickness of your choice. |

| | Polyline | Multiple connected line segments that automatically connect to form a polygon. |

| | Text | Text, such as notes, comments, edits and initials. |

| | Stamp | A stamp with the same visual effect as a rubber stamp to a paper document. |

Note: You can customize a rubber stamp for your company as MCM does not have any default rubber stamps.

| | Circle | A circle or oval of a color and thickness of your choice. |

| | Sticky Note | A captioned note box in which you can add, and read extensive text. |

To Add Sub-Folders

You can add sub-folders to an existing folder and sub-folders. You use a sub-folder name from a predefined list or use a free form name.

1. From the toolbar, select the Add Sub-Folder button .

   The Add Sub-Folder window opens.
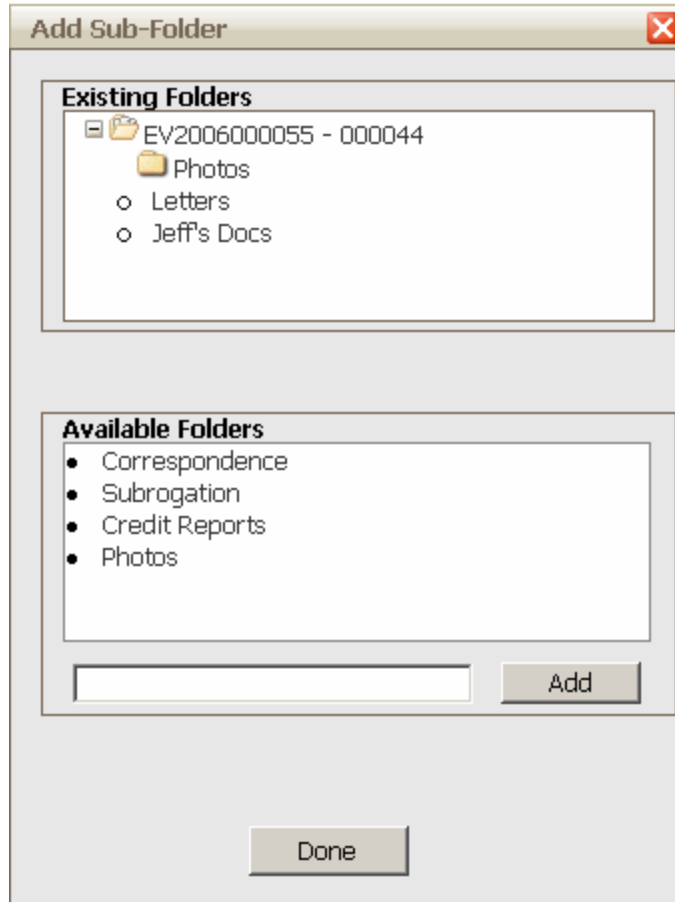
2.   From the Existing Folders frame, select the folder or sub-folder in which you want to add a new folder.

3.   Do one of the following:

- To add a predefined sub-folder, from the Available Folders frame, select an existing folder name.

- To add a new sub-folder, in the field, enter a name for the sub-folder.

4.   Select Add.
     The sub-folder name displays under the folder or sub-folder you selected.

To Copy Existing Documents to the AcroSoft Server

You can copy all existing documents from your document path to the AcroSoft server.

1.   From the Utilities menu, choose Tools and Designers > MCM Prefill Folder Utility.
     The MCM Prefill Folder Utility window opens and displays the document path type and document path.
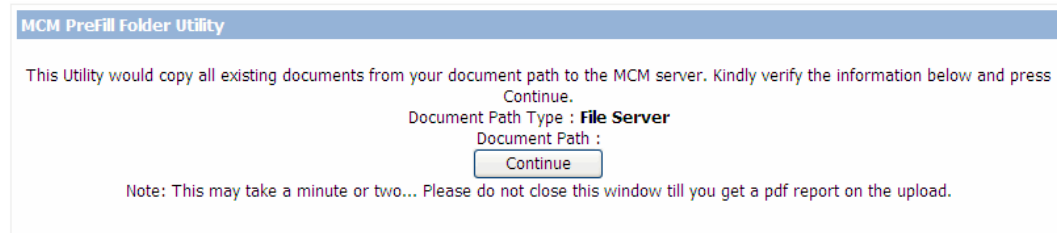
2. Select Continue.

    A .pdf document opens and displays the documents copied from your document path to the AcroSoft server.

To Delete Documents and Sub-Folders

To delete document(s)

1. In the right frame, select the check box for the document(s) you want to delete.

2. From the toolbar, select [icon].

    A Delete Documents window opens and displays a confirmation message.

Delete Documents

Are you sure that you want to delete the document(s) listed below?

Picture of Damage 12 - 2007/01/26 15:25

[Yes] [No]
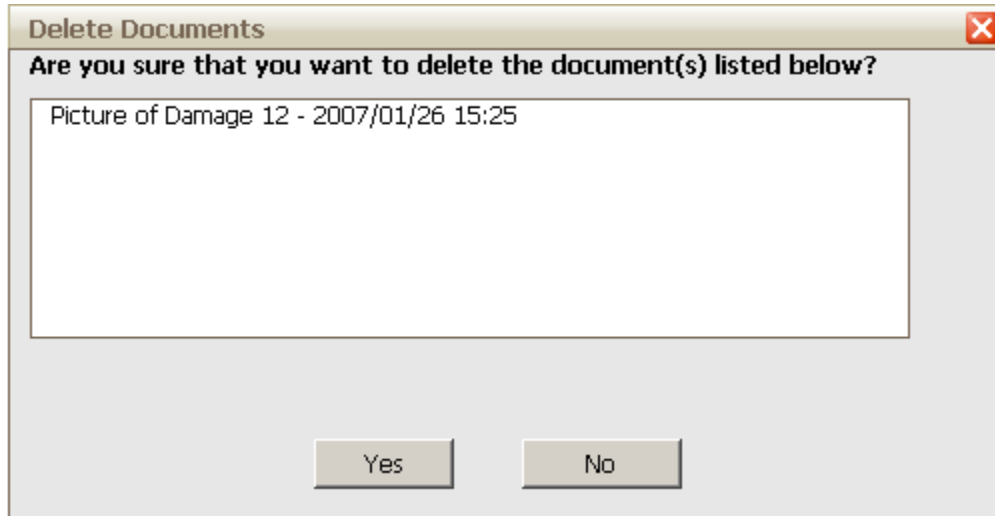
3. Select Yes.

    MCM deletes the selected document(s).

To delete sub-folder

1. From the left folders navigation tree, select the sub-folder you want to delete.

2. From the toolbar, select [icon].

    A Delete Subfolder window opens and displays a confirmation message.

Delete Subfolder

Are you sure that you want to delete?

Subfolder   Collection

[Yes] [No]
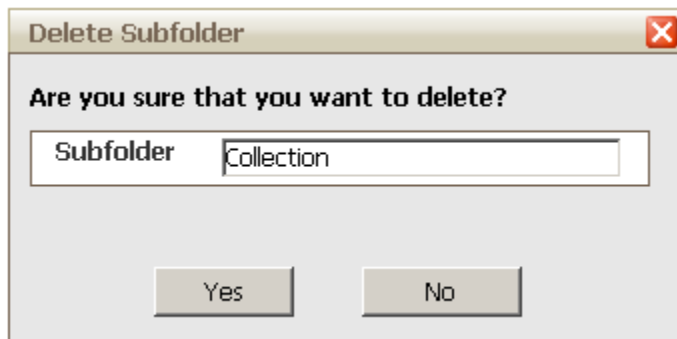
3. Select Yes.

    MCM deletes the selected folder.

To Edit Sub-Folder Name

1. In the left frame, from the folders navigation tree, select the sub-folder for which you want to modify name.

Note: You cannot modify the root folder name.

2. From the toolbar, select the Modify Sub-Folder button .
    The Modify Subfolder window opens.

3. In the field, enter a new name for the sub-folder.
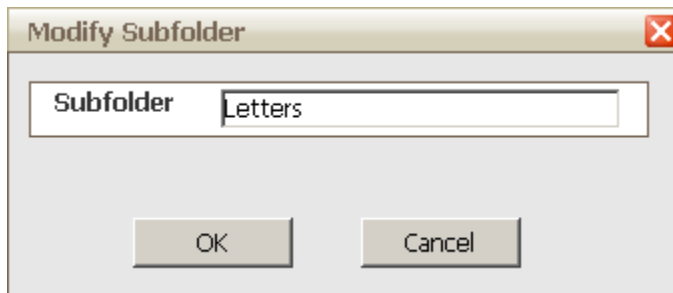
4. Select OK.
    The documents navigation tree displays the edited sub-folder name.

To Email Documents

You can email documents to various recipients.

1. In the right frame, select the check box for the document you want to email.

2. From the toolbar, select the Send Documents button .
    The Send Documents window opens.

3. In the To field, enter the recipient's email id.
4. In the Subject field, enter the email subject.
5. In the Message field, enter the email body.
6. To attach the document as a zip file, select the Zip check box.
7. Select Send.

    The document is sent as an attachment in your email.

Tips

To Enable in Utilities

1. Open RISKMASTER Utilities .
2. From the main menu, choose Manager > General System Parameter Setup.
3. On the System Settings tab, select the Use MCM Interface check box.

    The Activation Code Required window opens.

4. In the field, enter the code to activate Media Content Management.

Note: Contact your system administrator , for your activation code.

5. Select OK.

To Move Documents

You can move one or more documents from folders to sub-folders or between sub-folders.

1. In the right frame, select the check box for the document(s) you want to move.

2. Select the Move Documents button ![icon] .
    The Move Documents window opens and displays the document(s) you selected to move.

3. In the lower frame, from the navigation tree, select the folder or sub-folder to which you want to move the document(s).
    The folder name displays in the Move To field.

4. Select OK.
    The document(s) move to the selected folder or sub-folder.

To Change Index Keyword for a Document

You can move documents to the folder or sub-folder with your specified index keyword.

1. In the right frame, select the check box for the document(s) you want to re-index.

2. From the toolbar, select the Reindex Document button ![icon] .
    The Reindex Documents window opens and displays the existing folder index keyword.

3. From the Index Class drop down list, select an index class of the new folder.

Note: Based on the Index Class you select, specific fields display.

4. If you select the Standard index class, in the Event Number and Claim Number fields enter information to re-index and move the document(s).
5. If you select the Policy index class, in the Policy Number field, enter a policy number, to which you want to re-index and move the document(s).
6. If you select the User index class, in the User Id field, enter the user ID, to which you want to re-index and move the document(s).
7. Select OK.

    The document(s) move to the re-indexed folder.

Note: You can search for and open the re-indexed folder and view the document(s).
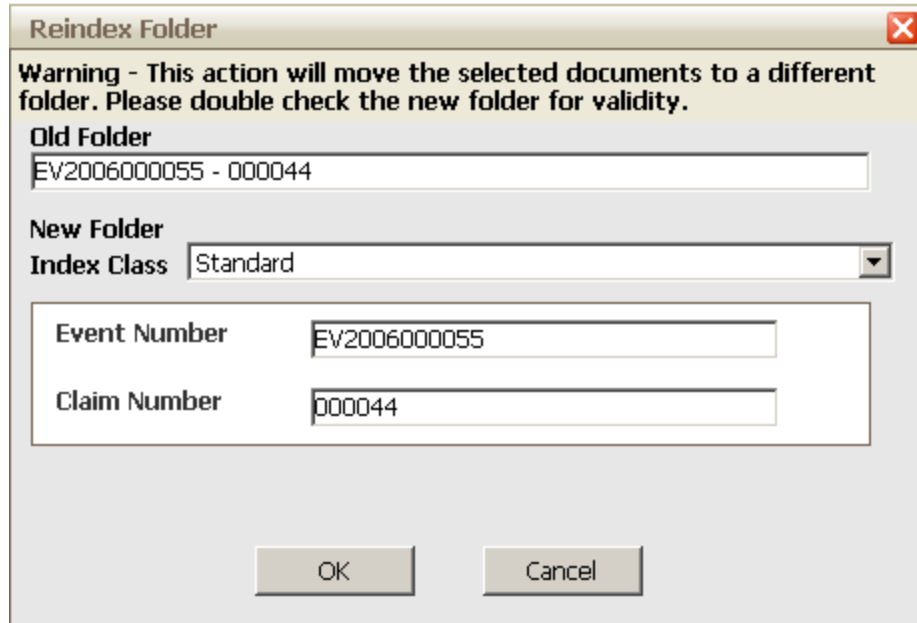
To Change Index Keyword for a Folder

If your folder is categorized under a common index keyword, you can change the index keyword. Document(s) indexed to a folder, move to the folder with the changed index keyword.

1. In the left frame, from the navigation tree, select the folder you want to re-index.

2. From the toolbar, select the Reindex Folder button .

    The Reindex Folder window opens and displays the existing index keyword.

3. From the Index Class drop down list, select an index class of the new folder.

   Note: Based on the Index Class you select, specific fields display.

4. If you select the Standard index class, in the Event Number and Claim Number fields enter information to re-index the folder.

5. If you select the Policy index class, in the Policy Number field, enter a policy number, to which you want to re-index the folder.

6. If you select the User index class, in the User Id field, enter the user id, to which you want to re-index the folder.

7. Select OK.

   The folder is re-indexed.

To Search for a Folder

You can search for folders based on index keywords, or any other available information, such as, name or a combination of information. For example, if you search for folders with C*, all folder names that begin with the letter C display in the Search Results. If you use a combination of information, you can get more exact results. The search criteria are based on the index fields defined in the index class.

1. From the toolbar, select the Search Again button .

   The Folder Search window opens.

2. From the Search Type drop down list, select the Index Class to search for a folder.

   Based on the index class you select, specific fields display.

3. Enter your search criteria in the fields that display.

4. Select Submit.

    The Folder Search Results window opens and displays the folder names that meet your specified search criteria.

5. To open a folder, select the folder name.

To Upload Documents

You can upload documents from your computer, directly into folders and sub-folders.

1. In the left frame, from the folders navigation tree, select the folder or sub-folder to which you want to upload the document(s).

2. From the toolbar, select the Upload Documents button [icon].

    The Upload Document window opens.
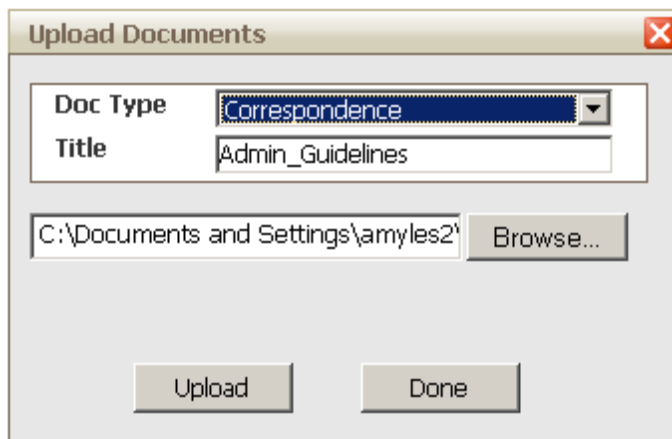
3. From the Doc Type drop down list, select the document type, such as Correspondence, Invoice , Photo, and so on.

4. In the Title field, enter a title for the document, you want to upload.

5. Select Browse.

    The Browser window opens.

6. Navigate to the file you want to upload.

7. Select Upload.

    The file displays in the folder or sub-folder you select.

8. Select Done.

To View Existing Documents

1. Search for the event or claim you want to attach the file to.

    The event opens in the Event window or the claim opens in a Claims window.

2. From the toolbar, select the Attachments button [icon].

    The RISKMASTER window displays the [MCM user interface](#) and the folders navigation tree.
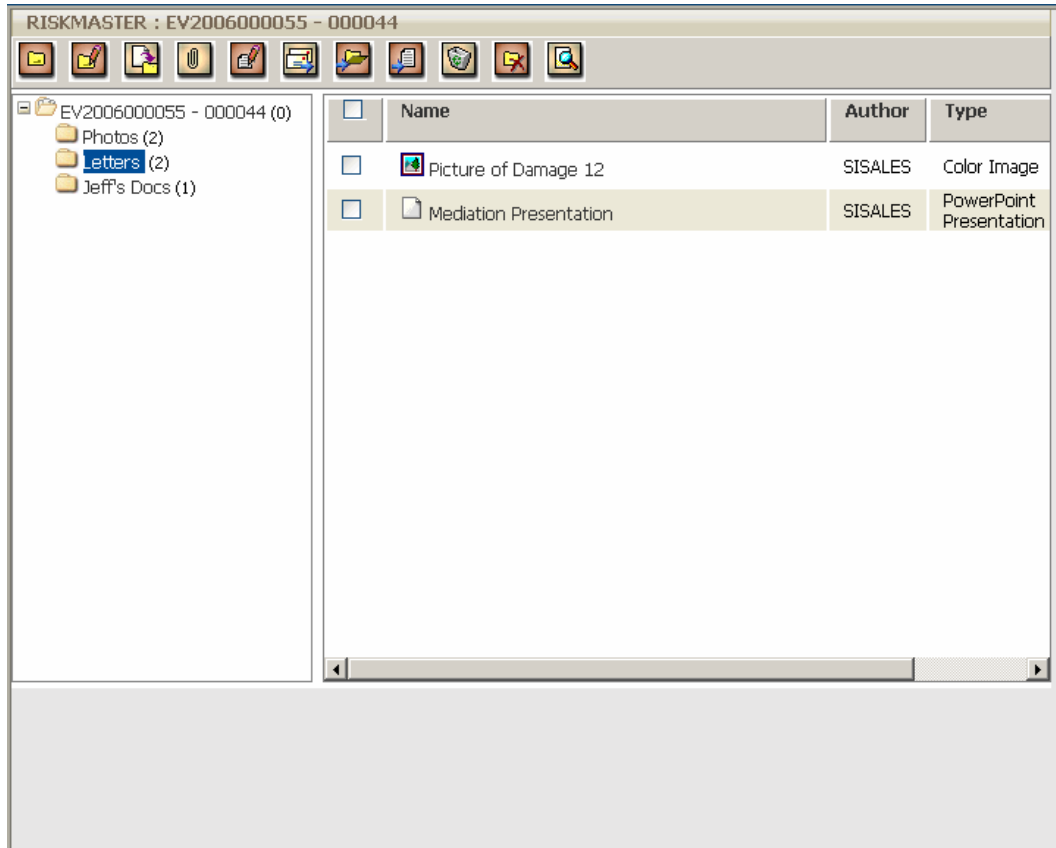
3. In the left frame, from the navigation tree, select a folder or sub-folder for which you want to view the documents.

   The right frame displays the documents in the selected folder or sub-folder.

Note: The file name, author, file type and date for each file also displays.

4. Select the file name you want to view.

   The selected file opens in the associated application, such as MCM Image Viewer, MS-Word, MS-Excel or Acrobat Reader.

To Work with Annotations

You can use annotations to add information or emphasis to a document image or a digital image, as it displays in the MCM Image viewer.

To view or hide an annotation

1. Open an image file in MCM Image Viewer.
2. From the Annotation toolbar, select an annotation type tool, and add an annotation to the image.
3. Do one of the following:

   - To view the annotation on the image, select the .

   - To hide the annotation on the image, select the .

4. Close the MCM Image Viewer.

To print or not print an annotation

1. Open an image file in MCM Image Viewer.
2. From the Annotation toolbar, select an annotation type tool, and add an annotation to the image.
3. Do one of the following:

   - To print the image with the annotations, select the .

   - To print the image without the annotations, select the .

4. Close the MCM Image Viewer.

To resize or move an annotation

1. Open an image file in MCM Image Viewer.
2. From the Annotation toolbar, select an annotation type tool, and add an annotation to the image.
3. On the image, left click the annotation.
4. To move the annotation, use the cursor to move the annotation to another position on the image.
5. To resize the annotation, use the cursor to change the size of the annotation.
6. Close the MCM Image Viewer.

To change the annotation properties
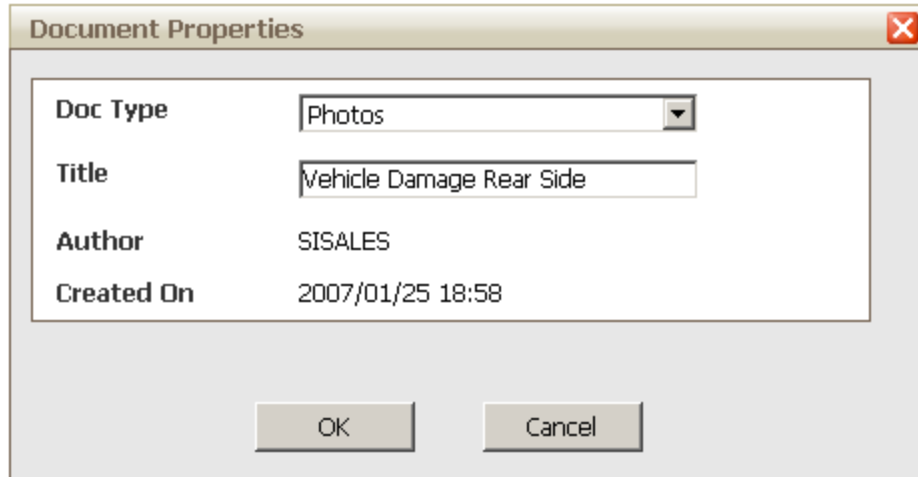
1. Open an image file in MCM Image Viewer.
2. From the Annotation toolbar, select an annotation type tool, and add an annotation to the image.
3. On the image, right click the annotation.
4. A pop-up menu opens.
5. From the pop up menu, choose Properties.
6. Select the line width, color, and other properties of the annotation.
7. Select OK.
8. Close the MCM Image Viewer.

To Work with Document Properties

You can view and edit the document properties, such as type, title, media type, author and date and time of creation.

1. In the right frame, select the check box for the document for which you want to view the properties.

2. From the toolbar, select the Document Properties button .

   The Document Properties window opens.

3.   To edit the document properties, modify the information in the Document Type, Title and Media Type fields.
4.   Select OK.

Outlook Integration

To Activate Microsoft Outlook Feature and Set File Size

To Activate Microsoft Outlook feature

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose System Parameters
   The System Parameters menu opens.

3. From the System Parameters menu, choose General System Parameter Setup.
   The General System Parameter Setup window opens.

4. On the General System Parameter Setup window, select the 'Use Outlook To Send Email' check box.
   The Outlook feature activates with RISKMASTER X.

To Set Size of Files E-mailed Using Outlook

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose System Parameters
   The System Parameters menu opens.

3. From the System Parameters menu, choose General System Parameter Setup.
   The General System Parameter Setup window: System Settings tab opens.

4. In the ' Size Limit(in MB) for Files that can be emailed using Outlook' field enter the size of the file.
   Note: You can enter minimum 1 and maximum 35 in this field.

RISKMASTER Outlook Integration

The RMX Outlook Integrated feature offers a two way interaction between Microsoft Outlook and RISKMASTER. With this you can attach e-mails and files to the claims directly in RISKMASTER Accelerator. When you send e-mails through , the Outlook client will open up with attachments pre-loaded in.

When the Plug-In is installed, two new buttons are available in Users Outlook client New RMX Email and Upload Item(s) to RMX

Note:

Exchange server web service API should be available on the system to interact with the web server.

To E-mail Claim Attachments From RISKMASTER Using Outlook

When you send email using Outlook you will be able to see your outlook address book. Emails sent using will be visible in Outlook's Sent Items folder.

1. [Search](#) and open the claim for which you want to e-mail attachments.

2. On the required claim window, from the toolbar select the Attachments ![attachments icon] button.
   The Document Management window opens.

3. From the Claim Attachments list, select the check box against the required file which you want to e-mail using Outlook.

4. Select the **E-Mail Using Outlook** button.

Note: Microsoft Outlook should be open when you try to send attachments from using Outlook.

The Outlook new message window opens with the Claim Number in the Subject of the e-mail.

5. Compose the e-mail message and select the Send button.

The selected file is send as an e-mail through Outlook.

> Note: If the attachment size is greater than the allowable attachment size, when you select the Send button, you will get a prompt telling you the file size is too large. The allowable file size is set up on the General System Parameters window in Utilities.

To Upload an E-mail from Outlook

To upload an E-mail from Outlook to , do one of the following:

- [Send as email attachment from Outlook](#)

- [Attach directly from Outlook](#)

> Note: When you send email using Outlook you will be able to see your Outlook address book. Emails sent will be visible in Outlook's Sent Items folder.

Send as Email Attachment from Outlook

1. Open Microsoft Outlook.
2. From the MS Outlook window, compose a new e-mail.
   The Compose Message window opens.

3. In the To.. and Cc.. field, enter the e-mail address of the person you want to send the e-mail to.
4. In the Subject field, enter the subject of the e-mail.
5. Select the Send button.
   A confirmation message window opens if the prompt level settings have been done while configuring MS Outlook.

6. Select the Yes button if you want to upload the e-mail to .
   The ClaimInfo window opens.

7. In the Claim/ Event Number field, enter the claim or event number to which you want to upload the e-mail.

8. Select the Claim or Event option, based on whether you want to attach email to claim or event information.

9. Select the Upload button.

   The e-mail is sent to the e-mail address specified in the To/ Cc field and it is also attached to the specified claim number in .

Attach Directly from Outlook

1. Open Microsoft Outlook.
2. From the Inbox, select the e-mail which you want to attach to a claim or event in RISKMASTER.
3. Select the Upload Mail button.
   The ClaimInfo window opens.
4. In the Claim Number field, enter the claim number to which you want to attach the e-mail.
5. From the Format drop down list, select the format of the file that you want to attach to RISKMASTER through e-mail.
6. Select the Send Attachments to RMX check box, to send attachments in the e-mail to RISKMASTER.
7. Select the Upload button to attach the e-mail to the specified claim.

To Attach an E-mail to a Claim from Outlook

1. Open Microsoft Outlook.

2. On the Microsoft Outlook window, select the **New RMX Email** button.
   The MS Outlook New Message window opens.

3. Compose the e-mail message and enter the recipients e-mail address.
4. In the Claim No. field, enter the claim number to which you want to attach the e-mail.
5. Select the Send Attachments to RMX check box, to send attachments in e-mail to RISKMASTER.
   Note: The size of attachment can be of maximum 50 MB.

6. From the Format drop down list, select the format of the file you want to attach to RISKMASTER through e-mail.
7. Select the Send button.
   The e-mail is attached to selected claim in RISKMASTER.

Policy Tracking

Policy Tracking Overview

Use RISKMASTER to manage insurance policies for claim payment, policy analysis, renewal organization, reporting, and quick online reference.

Policy management in RISKMASTER offers the following benefits:

- Analysis of the most common exposures.

- Additional user-defined exposure bases.

- Timely notification of approaching coverage exhaustion and renewal dates.

- Intelligent selection of appropriate coverages.

- Application of payments to the appropriate policies.

- Trend analysis of policy-claims experience.

- Complete integration with all claims databases.

- User-defined reporting.

- Automated production of cancellation notices.

- Linkage of related policies into coverage triangles.

To Add a Policy

1. From the main menu, select Maintenance.

    The Maintenance menu opens.

2. From the Maintenance menu, choose Policy Tracking.
    The Policy Tracking window opens and a Policy Tracking link displays under Maintenance node in the navigation tree.

3. Select and complete the fields in the Policy Information tab , as shown below.

Policy Name	Enter a unique identifying name for the policy.
Policy Number	Enter a unique identifying number for the policy.
Policy Status	Enter the code that best describes the status of the policy or select the button to select from the Code Selection window.
Premium	Enter the dollar amount the insured pays as policy premium.
Bank Account	From the drop down list, select the bank account from which you will make claim payments.

Primary Policy	Select the check box if the policy is the primary policy and it is linked to an excess policy or policies.
Claims-Made Coverage	Select the check box if you want RISKMASTER to check the claim date against the policy date range to decide whether the policy can be associated with a claim.
Issue Date	Enter the date on which the policy was issued or select the button to select from a calendar.
Review Date	Enter the date on which you will review the policy to decide whether or not to renew the policy or select the button to select from a calendar.
Renewal Date	Enter the date on which you want to renew the policy or select the button to select from a calendar.
Effective Date	Enter the date on which the policy comes into effect or select the button to select from a calendar.
E xpiration Date	Enter the date on which the policy expires or select the button to select from a calendar.
Cancel Date	Enter the date on which you cancelled the policy or select the button to select from a calendar.

4. Select and complete the fields in the Insurer Information tab , as shown below.

Insurer	Enter the insurance company name or select the ⋯ button to open the Standard Entity Search window and search for an insurer.
	If you select an insurer from the search results, RISKMASTER automatically enters the insurer information on the tab.
	Before you enter new data, search for the insurer in existing records. This prevents duplicate entries in the database.
Contact	Enter the contact person for the insurance policy.
Address	Enter the insurance company's address. Enter the City, State, Zip, and Country in the appropriate fields.
Office Phone	Enter the insurance company's telephone number.
Alt. Phone	Enter the insurance company's additional telephone number, if any.
Fax	Enter the insurance company's fax number.
Insured	Select the ⋯ button to open the Org Hierarchy window and select the sites in your organization, the insurance policy covers.
	To delete an existing insured site, select the site and select the ⮕ button.

5. Select and complete the fields in the Broker Information tab , as shown below.

Last Name	Enter the insurance broker's last name or select the ••• button to open the Standard Entity Search window and search for an insurer .
	If you select an insurer from the search results, RISKMASTER automatically enters the broker information on the tab.
First Name	Enter the broker's first name.
Address	Enter the broker's home address. Enter the City, State, Zip, and Country in the appropriate fields.
Office Phone	Enter the broker's office phone number.
Alt. Phone	Enter the broker's alternate phone number.
Fax	Enter the broker's fax number.
Tax ID	Enter the broker's federal tax identification number.
Broker Firm	Enter the broker's firm name or select the ••• button to open the Standard Entity Search window and search for a brokerage firm.

6. From the toolbar, select the Save button .
7. To add information about policy coverages, select the Policy Coverages button.
   The Policy Coverage window opens.

8. Complete the fields on the Policy Coverage window , as shown below .

Coverage Type	Enter the code that best describes the coverage type or select the 🔍 button to select from the Code Selection window.
	RISKMASTER compares a policy's Coverage Type with a claim's Claim Type to display the policies you can select for a specific claim.
Broker Last Name	Enter the insurance broker's last name.
Policy Limit	Enter the total maximum coverage amount for all the claims the policy covers.
Event /Occurrence Limit	Enter the total maximum coverage amount for all claims related to a single event the policy can cover.
Claim Limit	Enter the maximum coverage amount for any single claim within an event.
Total Payments	Enter the total amount of the payments already paid by the policy.
SIR/ Deductible	Enter any self-insured retention or deductible applicable on the policy.

Next Policy

Enter the next lower level of coverage or select the ⋯ button to open the Standard Policy Search window and search for the next policy.

Cancellation Notice (Days)

Enter the number of days of prior notice the insured receives before coverage is cancelled.

Notification User

Enter the user name responsible for renewing policies or select the 🔍 button to open the System Users window and select the user name.

RISKMASTER sends diary notification to the selected user prior to policy expiration.

Exceptions

Enter any exceptions in coverage or select the 📝 button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter the exception and then select OK.

Section Number

Enter the section number of the policy or select the 🔍 button to open Code Selection window and search for the policy section number.

Remarks

Enter comments about the coverage or select the 📝 button to open the RISKMASTER Editor. In the RISKMASTER Editor, enter comments and then select OK.

Back to Policy

Select to open to the Policy Tracking window .

9. To add information about Managed Care Organizations, select the Policy MCO button.
    The Policy MCO window opens.

10. Complete the fields on the Policy MCO window , as shown below .

Policy MCO

Enter the Managed Care Organization's name or select the ⋯ button to open the Standard Entity Search and search for an MCO.

Begin Date

Enter the date on which the policy comes into effect or select the button to select from a calendar.

End Date

Enter the date on which the policy expires or select the button to select from a calendar.

Back to Policy

Select to open the Policy Tracking window .

11. To add multiple insurers with responsible for a certain percentage of the total insured value, select the Insurer button.

Note: The Insurer button displays, if you select the Multiple Insurers for Policy check box on the System Setup Parameters window in Utilities.

The Policy Insurer window opens.

12. Complete the fields on the Policy Insurer window , as shown below .

Insurer	Enter the insurance company name or select the ••• button to open the Standard Entity Search window and search for an insurer.
	If you select an insurer from the search results, RISKMASTER automatically enters the insurer information on the tab.
	Before you enter new data, search for the insurer in existing records. This prevents duplicate entries in the database.
Contact	Enter the contact person for the insurance policy.
Address	Enter the insurance company's address. Enter the City, State, Zip, and Country in the appropriate fields.
Office Phone	Enter the insurance company's telephone number.
Alt. Phone	Enter the insurance company's additional telephone number, if any.
Fax	Enter the insurance company's fax number.
Portion of Part of Layer	
Part of Total Layer	
Installment Payment	Enter the installment amount to be paid to the insurance company.
Installment Schedule	Select the 🔍 button to open the Code Selection window and then select the Installment Schedule.
Special Circumstances	
Layer Number	
Occurence Limit	Enter the total maximum coverage amount for all claims related to a single event the policy can cover.
Comments	Enter any additional comments about the insurer.
Primary Insurer	Select the check box if the insured is the primary insured.
Coverage Spec Desc for Reports	
Primary Insured	Select the check box if the insured is the primary insured.

> If you select the check box, the primary insurer information displays on the Insurer Information tab.

Responsible Percentage	Enter the percentage of the total insured amount in the policy, for which the insured is responsible.

13. If your organization defined Supplemental data and complete the Supplementals tab.

14. From the toolbar, select the Save button [save icon] .

Note: Search for information in existing records, before you enter new data . This prevents duplicate entries in the database.

Tips

To Edit a Policy

1. From the main menu, select Search.

   The Search menu opens.

2. From the Search menu, choose Policy Tracking.

   The Policy Tracking criteria window opens and a Policy Tracking criteria link displays under Search node in the navigation tree.

3. From the Search window, select the policy you want to edit.

4. Edit the information in the fields on each of the tabs.

5. To edit information about policy coverages, select the Policy Coverages button and make changes on the Policy Coverage window.

6. From the toolbar, select the Save button [save icon].

To Attach a Policy to a Claim

You can attach a **policy** to a **claim** to track dollars paid against a policy. If dollars paid on a claim are in excess of a specified **deductible** or self-insured retention, RISKMASTER allocates these dollars against the **policy limit** . You can also set up a dummy policy to track your self-insured retention.

Each time you process checks, claim and policy data are updated to reflect currently applied payment amounts.

The policy attached to a claim can also be accessed through the left navigation tree, The Policy node is available under the Claim node. When you select the Policy node, the Policy Lookup Results window, displays the available policies along with Policy Effective and Expiration dates.

To attach a policy to a claim:

1. From the main menu, select Search.

   The Search menu opens.

2. From the Search menu, choose Policy Tracking.

   The Policy Tracking criteria window opens and a Policy Tracking criteria link displays under Search node in the navigation tree.

3. From the Search window, select the policy you want to edit.

4. On the Policy Information tab, in the Policy Status field, select the code for In Effect.

Note: Ensure that the claim date falls between the policy effective date and the expiration date .

5. Select the Insurer Information tab.

6. From the Insured field, select the search button.

7. From the organizational hierarchy, select the department you selected on the Claim window for the claim you want to attach the policy to.

8. On the Policy Tracking window, select the Policy Coverages button.

   The Policy Coverage window opens.

9. From the Coverage Type field, select the search button to open the Code Selection window and select the claim type for the claim you want to attach the policy to.

10. Select the Back to Policy button.

11. To save the policy, from the toolbar, select the Save button .

12. Search for the claim you want.

13. On the Claim Info tab, from the Policy name field select the button.

    A list of policies opens including the policy you set up.

14. Select the policy you want to attach.

15. To save the claim with the policy attached, from the toolbar, select the Save button .

To Review Policies

You can review existing policies to track the policies that are nearing their review or renew dates.

1. From the menu bar, select Search.

   The Search menu opens.

2. From the Search menu, choose Policy Tracking.

   The Policy Tracking criteria window opens and a Policy Tracking criteria link displays under Search node in the navigation tree.

3. Select the policy you want to review.

   The Policy Tracking window and displays the selected policy.

4. Review the policy.

To Enter Triangle Policy Coverage

You can set up policies that enable you to purchase coverage in incremental amounts. These linked policies are commonly referred to as coverage layers. When you reach the policy limit for one coverage layer the next policy becomes effective, and when the policy limit for that policy is reached, the next policy becomes effective and so on.

It is a common practice to purchase additional or excess layers of coverage, that begin where the previous coverage layer ends.

You must establish links between the layers in order for RISKMASTER to use your coverage layers.

To link a policy to 2 excess coverage layers:

- Create the second excess layer first.

- Then create the first excess layer, and on the Policy Coverage window in the Next Policy field, enter the second excess layer.

- Lastly, create the primary policy, and on the Policy Coverage window in the Next Policy field, enter the first excess layer name.
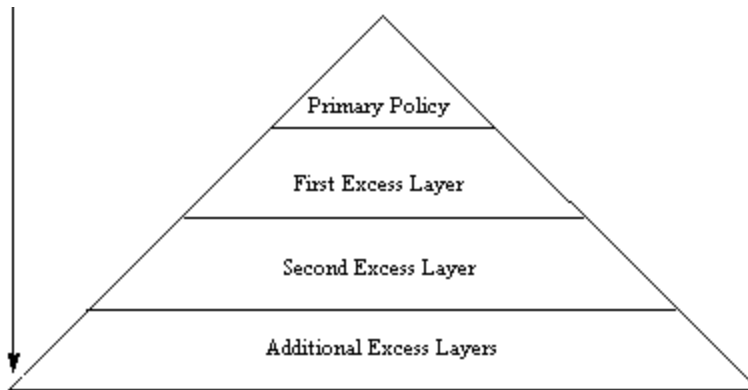
Diary Notification for Coverage/Policy Issues Overview

Using this feature an automatic diary notification is sent to the adjuster when any of the specified actions are performed on the policy or coverage.

- The policy or coverage is changed within 10 days prior to the date of loss / event. In this case the adjuster receives a notification that a change has been made and helps him to investigate by reviewing the policy system or speaking with an underwriter/accounts receivable person.

- Loss date is between policy inception date and 30 days after policy inception date. When the adjuster is notified about this they can determine if there may be overlapping coverage or fraud involved.

- Losses have been entered for the same policy or VIN within 3 years of the claim.

- A driver is added to a claim that is not listed on the policy.

Use the filters available on the Auto Diary wizard, to configure the automatic diaries for the policy/coverage.

Multi Language

Multiple Language Support Overview

RISKMASTER UX supports multiple languages. You can customize the RISKMASTER Accelerator application to display fields, messages and reports etc in required language .

The application uses the selected language to display content. One of the pre-requisite for this feature is that the database should also support Unicode character set.

To setup the language for any user, you can choose the Language from Security Management System. All the labels on the various windows would display in user selected language. You can also setup a System language which would be used by default.

You need to setup the validation messages, warnings and error messages using the localization settings.

The System/ User Code tables are translated however the short codes would remain same for the entire system. Tool Tips etc would also be translated. You can select the default date/time format, currency and spell check format for a Country. The format of date, time, currency etc would be based upon the selected country

Regional Localization Setup window

To open
- From the main menu, select Utilities.
- From the Utilities menu, select UI Admin.
- From the UI Admin menu, select Customization.
- From the Customization menu, select Localization Setup.

Field definitions

Languages   From the drop down list, select the language in which you want to localize the error messages, alert messages and MDI navigation.

Errors/ Pages/ MDI   From the drop down list, select the type or errors/ messages you want to localise in the selected language.

- Choose Globally used errors and alerts if you want to customize the errors and alert messages used in entire application

- Select the Page specific error/ alert messages option if you want to localise only errors used in specific window/ page in application.

- Select MDI if you want to localise the navigation menu text to display in selected language.

  Note when you select MDI in this field, the XML code for the MDI navigation menu opens, you can modify the code and enter alternate text in selected language to display in main menu.

- Select the Search option, if you want to localize the various search fields and search parameters in the selected language.

  - Note: When you select the Search option from the dropdown, the Search related fields display. I

- Search Category field select the category or module for which you want to localize the search.

- From the Type of Control field. select the Category/ group/field type for which the Search parameters need to be setup in the selected language.

- From the List of Search groups, select the group or field for which you want to provide the field label in selected language.

- In the Text field, enter the alternate text in the selected language.

Type From the drop down list, select the error message or alert message.

Enter Id or text to search field, Enter the text snippet or id based on which you want to search the error/ alert message for which you want to enter alternate text in selected language.

List of messages From the dropdown, select the message for which you want to setup alternate text in selected language.

Text Enter the text in selected language for the error/ alert message.

Note: The text you enter here is displayed when the chosen error occurs in the application and the selected language is setup for the logged in user.

To Define User Codes Description In Selected Language

Note: You can only define the code description for user codes. The short codes for a code would not be translated in the specified language in the text you specify here.

1. From the main menu, select Maintenance menu
   The Maintenance menu opens.

2. From the Maintenance menu, choose Table Maintenance.
   The Table Maintenance window opens and a Table Maintenance link displays under the Maintenance node display in the left navigation tree.

3. From the drop down list, select the table type as User Code Tables.
4. From the List of Code Tables, select a table.

5. In the right frame, from the list of codes , select the option for the code for which you want to enter additional code in desired language.

6. Select the Additional Language Codes button.

The Lookup window displays the alternate language codes available for the selected code.

7. Select the Additional Language Description button.
The Enter Code Detail window opens.

8. In the Description field, enter the alternate text in desired language in which you want to display the code description for selected code.

9. From the Language dropdown, select the desired language.

To Define Zip Code and Phone Number Format for a Country (Regional Configuration)

1. From the main menu, select Utilities.
2. From the Utilities menu, choose System Parameters.

   The System Parameters menu opens.

3. From the System Parameters menu, select General System Parameter Setup.
4. On the General System Parameter Setup window, select the Globalization tab.

   The General System Parameter Setup window:Globalization tab opens.

5. On the Globalization tab, in the Regional Configuration section, select the option for the country for which you want to modify/ setup Zip Code, Phone number format.

   The Regional Format window opens.
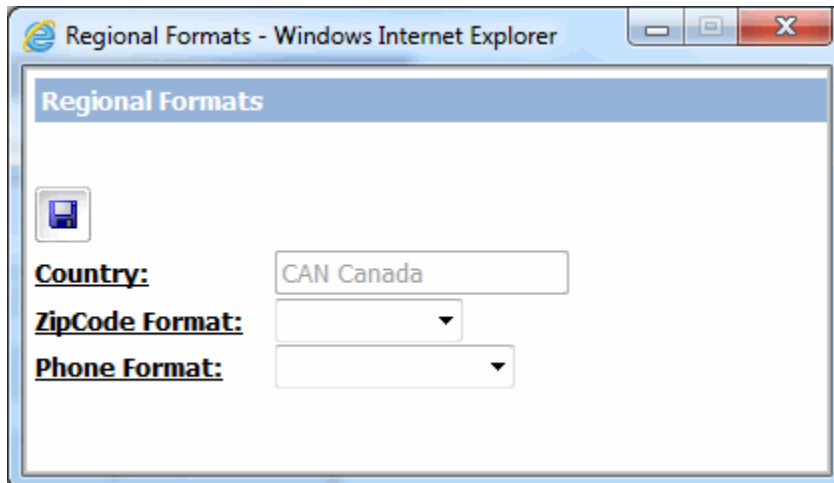
6.   From the Zip Code Format drop down list, select the format of the zip code which is valid for the country.

7.   From the Phone Format drop down list, select the format of the phone number which is valid for the country.

To Select Language for a User

1.   From the main menu, select Security.

     The Security menu opens.

2.   From the Security menu, choose Security Management System.

     The RISKMASTER Security window opens.

3.   From the left pane, select + to expand the RISKMASTER Security node.

4.   Under the User node, select the user for which you want to select the language and customize the application to display in the selected language.

     The User Settings window opens.

5.   From the Language dropdown, select the language you want to use for the user.

> Note: The languages available in this field based on the settings in the General System Parameter Setup window: Globalization tab, Multi Language Setup section. Only the languages supported in the system would be visible and can be selected for a particular user.

6.   From the toolbar, select the Save button.

To Setup Multi Language features

1.   From the main menu, select Utilities.

2.   From the Utilities menu, choose System Parameters.

     The System Parameters menu opens.

3.   From the System Parameters menu, select General System Parameter Setup.

4.   On the General System Parameter Setup window, select the Globalization tab.

The General System Parameter Setup window:Globalization tab opens.

5. On the Globalization tab, in the Multi Language Setup section, select the option for the language.

6. Select the button to modify the language settings.

The Multi-Language window opens.

7. From the Supported dropdown, select Yes or No, to define whether system supports the selected language or not, the language for which you select Yes in this field will only be available on the Security Management System while setting up language for a user.

To Localize Error Messages, Warning Messages for Multiple Languages

1. From the main menu, select Utilities.

   The Utilities menu opens.

2. From the Utilities menu, select UI Admin.

   The UI Admin menu opens.

3. From the UI Admin menu, select Customization.

   The Customization menu opens.

4. From the Customization menu, select Localization Setup.

   The Resource Localization window opens.

5. From the Languages drop down list, select the language in which you want to localize the error messages, alert messages and MDI navigation.

6. From the Errors/ Pages/ MDI/<mark>Search</mark> drop down list, select the type or errors/ messages you want to localise in the selected language.

   - Choose Globally used errors and alerts if you want to customize the errors and alert messages used in entire application

     - Select the Page specific error/ alert messages option if you want to localise only errors used in specific window/ page in application.

       - From the Type drop down list, select the error message or alert message.

       - In Enter Id or text to search field, enter the text snippet or id based on which you want to search the error/ alert message for which you want to enter alternate text in selected language.

       - From the List of messages field, select the message for which you want to setup alternate text in selected language.

- In the Text field, enter the text in selected language for the error/ alert message.

- Note: The text you enter here is displayed when the chosen error occurs in the application and the selected language is setup for the logged in user.

- Select MDI if you want to localise the navigation menu text to display in selected language. Note when you select MDI in this field, the XML code for the MDI navigation menu opens, you can modify the code and enter alternate text in selected language to display in main menu.

- Select the Search option, if you want to localize the various search fields and search parameters in the selected language.

    - Note: When you select the Search option from the dropdown, the Search related fields display. I

    - Search Category field select the category or module for which you want to localize the search.

    - From the Type of Control field. select the Category/ group/field type for which the Search parameters need to be setup in the selected language.

    - From the List of Search groups, select the group or field for which you want to provide the field label in selected language.

    - In the Text field, enter the alternate text in the selected language.

7.   Select the [icon] button.

Bill Review System

BRS Settings Window

To open
- ▪ From the Managers menu, choose BRS Setup.
- ▪ From the BRS Setup menu, choose BRS Settings.

Field definitions

BRS Keep On Next Fields Settings

Bill Payment Fields	Displays the bill payments fields.
>	Select a bill payment field and then select the button to add the bill payment field to the Keep On Next Fields list.
>>	Select the button to add all bill payment fields to the Keep On Next Fields list.
<	Select a bill payment field and then select the button to remove the selected bill payment field from the Keep On Next Fields list.
<<	Select the button to remove all bill payment field from the Keep On Next Fields list.
Keep on Next Fields	Displays the list of bill payments fields that you have selected to display on next payments.

BRS Basic Settings

Generate EOB Code for Contract Amount Overwrite	Select the check box to generate an Explanation of Benefits code for the contract amount.
Default Discount on Contract Scheduled Amount	Select the check box if you want the default discount to be given on the scheduled amount for the contract.
Default Discount on Contract Billed Amount	Select the check box if you want the default discount to be applied on the billed amount for the contract.
Default Discount on Contract 2nd Scheduled Amount	Select the check box if you want the default discount to be applied on the second billed amount for the contract.

Tips

Modifier Values Window

Use the Modifier Values window to review, add, edit or delete fee modifiers.

To open   From the Fee Tables window, select the Modifier Values button.

Field definitions

Modifier Code	Displays the modifier code for which you set a modifier value.
Start CPT	Displays the starting billing code for the range of possible procedures that will be available for this modifier code.
End CPT	Displays the ending code for the range of possible procedures that will be available for this modifier code.
Modifier Value(%)	Displays the percentage by which you want the bill item reduced during BRS calculations.
Maximum RLV	Displays the maximum amount you can pay for this bill.
	Select to open the Modifier Values Setup window.
	Select a modifier code and then select this button to open the Modifier Values Setup window, and edit the selected code.
	Select a modifier code and then select this button to delete the selected code.

CPT Codes Listing Window (for Extended Codes)

Use the CPT Codes Listing window to add, edit or delete CPT codes which are imported from external tables.

To open	From the Fee Tables window, select the Extended Table button.

Field definitions

CPT	Displays the codes you import from external tables.
Description	Displays the code description.
Amount	Displays the maximum amount to pay for this billing code.
	Select to open the CPT Extended Code Details - Add window and add a CPT code.
	Select a table from the list of tables and then select the Edit button to open the CPT Extended Code Details - Change window and edit the selected code.
	Select a table from the list of tables and then select the Delete button to delete the selected code.

CPT Extended Code Details - Add Window

Use the CPT Extended Code Details - Add window to add a CPT code to the external table from which the extended codes are imported.

> Note: In the Fee Tables when Type 'Extended BRS Schedule' is selected then Extended Table button gets visible.

To open
From the CPT Codes Listing window, select the [ ] button.

Field definitions

CPT Code	Enter the code you want to add.
Code Description	Enter a description for the code
Amount	Enter the maximum amount to pay for this billing code.
Professional Component	
Follow-Up Days	
[💾]	Select to save your changes and close the window.
Starred (*)	
ByReport (BR)	
Assistant At Surgery (Y, N, R)	
Anesthesia Value Unit	
Anesthesia ByReport (BR)	
Anesthesia Not Applicable (NA)	

Modifier Values Setup Window

Use the Modifier Value window to enter a new default modifier value for an existing modifier code. Modifiers are codes you can use to calculate a specified percentage increase or decrease the payment for an item. You can specify a default value for each modifier.

To open
From the Modifier Values window, select the [ ] or the Edit [ ] button.

Field definitions

Modifier Code

Enter the modifier code for which you want to set a modifier value or select the button to select from a Code Selection window.

Start CPT Code

Enter the starting billing code for the range of possible procedures that will be available for the modifier you are defining.

End CPT Code

Enter the ending code for the range of possible procedures that will be available for the modifier you are defining.

Modifier Values(%)

Enter the percentage by which you want the bill item reduced during BRS calculations.

Maximum RLV

Enter the maximum amount you can pay for this bill.

Select to save your changes and close the window.

CPT Basic Code Details - Add Window

Use the CPT Basic Code Details - Add window to add a CPT code to your basic user defined fee table.

To open

From the CPT Codes Listing window, select the button.

Field definitions

CPT Code

Enter the code you want to add.

Code Description

Enter a description for the code.

Specialty Type

Enter the code that best describes the speciality type or select the button to select from the Code Selection window.

Amount

Enter the maximum amount to pay for this billing code.

Select to save your changes and close the window.

Hospital Per Diem Values Window: Outpatient Charges Tab

Use the Hospital Per Diem Values window - Outpatient Charges tab window to define the per diem outpatient charges for hospital care and scheduled surgery of Florida jurisdiction.

To open

- From the Fee Tables window, select the Per Diem button.

- From the Hospital Per Diem Values window, select the Outpatient Charges tab.

Field definitions

Hospital Care %	Enter the percentage amount allowed for hospital care.
Sched. Surgery %	Enter the percentage amount allowed for scheduled surgery.
OK	Select to save the changes.
Cancel	Select to cancel the process and close the Hospital Per Diem Values window.
Country List	Select to upload country list in excel format.
CPT Rates	Select to upload CPT Rates in excel format.

Hospital Per Diem Values Window: Ambulatory Surgical Centers Tab

Use the Hospital Per Diem Values window - Ambulatory Surgical Centers tab window to enter the ambulatory surgical centers detail for Florida jurisdiction.

To open	▪ From the Fee Tables window, select the Per Diem button. ▪ From the Hospital Per Diem Values window, select the Ambulatory Surgical Centers tab.

Field definitions

Billed < Fee Sched	Enter the amount to be charged when the billed amount is less than the fee schedule.
Not in Fee Sched	Enter the amount to be charged when the billed amount is not in the fee schedule.
Billed >= Fee Sched	Enter the amount to be charged when the billed amount is more than the fee schedule.
Fee Schedule	From the drop down list, select a fee schedule table.
OK	Select to save the changes.
Cancel	Select to cancel the current process and close the Hospital Per Diem Values window.

Fee Tables Window

Use the Fee tables window to add, edit or delete fee schedules.

To open	▪ From the main menu, select Utilities. ▪ From the Utilities menu, select Managers. ▪ From the Managers menu, select BRS Setup > Fee Schedule.

Field definitions

Table	Displays the fee tables you have already set up.

Type	Displays the database type of the fee table.
Effective Date	Displays the date on which the fee table comes into effect. The Effective Date is the Start Date you entered when you added the fee table.
[icon]	Select to open the Fee Table Details window and add a fee table.
[icon]	Select a table from the list of tables and then select the Edit button to open the Fee Table Details window and edit the selected fee table.
[icon]	Select a table from the list of tables and then select the Delete button to delete the selected fee table.
Basic Table	Select to open the CPT Codes Listing window. Note: This button gets enabled only if you select a basic user defined fee table.
Per Diem	Select to open the Hospital Per Diem Values window. Note: This button gets enabled only when you select a Florida Only Hospital type fee table.
Modifier Values	Select to open the Modifier Values for window. Note: This button gets disabled if you select a basic user defined fee table.

Fee Table Details Window

Use the Fee Table Details window to add new fee schedule tables or edit existing fee schedules.

To open   From the Fee Tables window, select the [icon] or the [icon] button.

Field definitions

User Table Name	Enter the name that users will see when they select this table for a BRS payment detail.
Database Type	From the drop down list select one of the table types supported by BRS.
Fee Schedule	From the drop down list, select the fee schedule you want to use for this fee table. The path for the schedule you selected displays below the Fee Schedule field.
Start Date	Enter the first date on which this fee schedule becomes valid. Note: If you enter a payment detail with a date outside this date range, you cannot use this fee schedule.

End Date	Enter the last date on which this fee schedule will expire.
State	Enter the state for which you will use this fee table or select the search button to select from the States window.
	Note: This information is required only if you are setting up a workers' compensation table.
Priority	Enter a number to indicate priority.
	Note: Number 1 indicates the highest priority. If there are multiple fee tables for one zip code, BRS will use the priority you assign in this field, to decide the order in which the tables will be displayed in the Table drop down list on the BRS window.
UCR Percentiles	From the drop down list, select the UCR percentile you want to use for this fee table.
Default Percentile	Displays the default percentile depending upon the UCR percentile selected.
EOB Form Name	Enter the DOS file name for the form you send to the payee with the payment.
EOB Code File	From the drop down list, select the RISKMASTER table name for any user-defined codes to use with this fee schedule.
	Note: If you are using only the EOB codes built into BRS, do not enter information into this field.
🖫	Select to create a new fee table, or to save changes you made to an existing fee table.

CPT Codes Listing Window (for Basic Codes)

Use the CPT Codes Listing window to add, edit or delete CPT codes from a basic user defined fee table.

To open	From the Fee Tables window, select the Basic Table button.

Field definitions

CPT	Displays the codes you have already added.
Description	Displays the code description.
Amount	Displays the maximum amount to pay for this billing code.
▯	Select to open the CPT Basic Code Details - Add window and add a CPT code.
📝	Select a table from the list of tables and then select the Edit button to open the CPT Basic Code Details - Change window and edit the selected code.

Select a table from the list of tables and then select the Delete button to delete the selected code.

Hospital Per Diem Values Window: Inpatient Charges Tab

Use the Hospital Per Diem Values window - Inpatient Charges tab window to define the per diem inpatient charges for acute care hospital and trauma center of Florida jurisdiction.

To open	▪ From the Fee Tables window, select the Per Diem button. ▪ From the Hospital Per Diem Values window, select the Inpatient Charges tab.

Field definitions

Acute Care Hospital

Surgical Stay	Enter the per diem amount allowed for surgical stay in acute care hospital.
Non-Surgical Stay	Enter the per diem amount allowed for non surgical stay in acute care hospital.
Stop Loss Amount	Enter the stop loss amount.
Rehab or Psych %	Enter the rehabilitation or psychiatric care percentage.

Trauma Center

Surgical Stay	Enter the per diem amount allowed for surgical stay in trauma center.
Non-Surgical Stay	Enter the per diem amount allowed for non surgical stay in trauma center.
Stop Loss %	Enter the stop loss percentage.
OK	Select to save the changes.
Cancel	Select to cancel the process and close the Hospital Per Diem Values window.

To Import Fee Schedules

Before you can set up fee tables in BRS , you need to import the data source for your fee schedule, and register the data source to enable users can select the date source, when entering payment details.

To import fee schedules, you need to open RISKMASTER Utilities

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose Managers.
   The Managers menu opens.

3. From the Manager menu, select BRS Setup>Import Fee Schedule.
   The Fee Schedule Import wizard - Step 1 of 2 - Source Information window opens.

4. From the Provider drop down list, select a provider.
5. From the Fee Schedule Type drop down list, select a fee schedule type.
6. From the File to Import field, select the Upload File for Import button.
   The Upload File window opens.

7. From the Upload File window, select the Browse button.

The Choose file window opens.

8. From the Choose file window, select the directory that contains the fee schedules you want to import.

    Note: To select multiple files, press Ctrl key on the keyboard and then select the file name.

9. Select Open and then select Upload button.

    The Fee Schedule Import wizard - Step 1 of 2 - Source Information window opens and the selected path is displayed in the Source Directory frame.

10. Select Next.

    The Fee Schedule Import wizard - Step 2 of 2 - Target Information window opens.

11. In the Fee Schedule Name field, enter the name that you want users to see when they enter payment details.

12. Select Finish.

    The Fee Tables window opens and displays the inserted fee table.

13. In the Fee Tables window, select Done.

14. In the Fee Schedule Import wizard, select Close.

To Add Fee Tables

Before you set up fee tables, you need to import the data source for your fee schedule and register the data source to enable users can select the date source, when entering payment details.

To add a fee schedule

1. From the main menu, select Utilities.

    The Utilities menu opens.

2. From the Utilities menu, select Manager.

    The Managers menu opens.

3. From the Managers menu, select BRS Setup> Fee Schedule.

    The Fee Tables window opens and a Fee Schedule link displays under Utilities node in left navigation tree.

4. Select the [ ] button.

    The Fee Table Details window opens.

5. Complete fields in the Fee Table Details window , as shown below.

Table	Displays the fee tables you have already set up.
Type	Displays the database type of the fee table.
Effective Date	Displays the date on which the fee table comes into effect. The Effective Date is the Start Date you entered when you added the fee table.
[icon]	Select to open the Fee Table Details window and add a fee table.
[icon]	Select a table from the list of tables and then select the Edit button to open the Fee Table Details window and edit the selected fee table.
[icon]	Select a table from the list of tables and then select the Delete button to delete the selected fee table.

Basic Table   Select to open the CPT Codes Listing window .

This button gets enabled only if you select a basic user defined fee table.

Per Diem   Select to open the Hospital Per Diem Values window.

This button gets enabled when you select a Florida only Hospital type fee table.

Modifier Values   Select to open the Modifier Values for window.

This button gets disabled if you select a basic user defined fee table.

6.   Select the [icon] button.

BRS creates the fee table and adds it to the Fee Tables window.

To Edit Fee Tables

1.   From the main menu, select Utilities.
The Utilities menu opens.

2.   From the Utilities menu, select Manager.
The Manager sub-menu opens.

3.   From the Manager sub menu, select BRS Setup> Fee Schedule.
The Fee Tables window opens.

4.   From the list of tables, select the table you want to edit.

5.   Select the [icon] button.
The fee table you selected opens in the Fee Table Details window.

6.   Change the required fields in the Fee Table Details window.

7.   Select the [icon] button.
BRS saves the changes you made to the fee table and the Fee Tables window opens.

To Add Billing Codes for User Defined Fee Tables

When you create basic user defined fee tables, you can add the CPT billing codes you want use in the fee table.

1.   From the main menu, select Utilities.
The Utilities menu opens.

2.   From the Utilities menu, choose Managers.
The Managers menu opens.

3.   From the Managers menu, choose BRS Setup> Fee Schedule.
The Fee Tables window opens and a Fee Schedule link displays under the Utilities node in the left navigation tree.

4.   Select the user defined fee table to which you want to add CPT codes .

5.   Select the Basic Table button.
The CPT Codes Listing window opens.

6.   Select the New [icon] button.
The CPT Basic Code Details window opens.

7. Complete the fields on the CPT Basic Code Details window.

8. Select the save button.

   The CPT Basic Code Details window closes.

9. From the CPT Codes Listing window, select Done.

To Add User Defined Fee Tables

Before you set up fee tables, you need to import the data source for your fee schedule and register the data source to enable users can select the date source, when entering payment details.

When you create user defined fee tables, you can include only the CPT that you want to use in the fee table.

To Add a User Defined Fee Table

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, select Managers.
   The Managers menu opens.

3. From the Managers menu, select BRS Setup> Fee Schedule.
   The Fee Tables window opens and a Fee Schedule link displays under the Utilities node in the left navigation tree.

4. Select the new button.
   The Fee Table Details window opens.

5. In the User Table Name field, enter the name you want the system to display, when the user selects this table from the BRS window.

6. From the Database Type drop down list, select Basic User Entered Schedule.

7. Complete the other fields on the Fee Table Details window.

8. Select the save button.
   BRS creates the user defined fee table and adds it to the Fee Tables window.

9. On the Fee Tables window, select the user defined fee table you created.

10. Select the Basic Table button.
    The CPT Codes Listing window opens.

11. Select the new button.
    The CPT Basic Code Details window opens.

12. Complete the fields on the CPT Basic Code Details window.

13. Select the save button.
    The CPT Basic Code Details window closes.

To Add Hospital Per Diem Values

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, choose Managers.
   The Managers menu opens.

3. From the Managers menu, choose BRS Setup> Fee Schedule.

The Fee Tables window opens and a Fee Schedule link displays under Utilities node in the left navigation tree.

4. From the Fee Tables section, select a Florida Only Hospital type user defined fee table, to which you want to add per diem values.
5. Select the Per Diem button.
   The Hospital Per Diem Values window : Inpatient Charges tab opens.
6. Complete fields on the Hospital Per Diem Values window: Inpatient Charges tab, as shown below.

   Acute Care Hospital

   Surgical Stay   Enter the per diem amount allowed for surgical stay in acute care hospital.

   Non-Surgical Stay   Enter the per diem amount allowed for non surgical stay in acute care hospital.

   Stop Loss Amount   Enter the stop loss amount.

   Rehab or Psych %   Enter the rehabilitation or psychiatric care percentage.

   Trauma Center

   Surgical Stay   Enter the per diem amount allowed for surgical stay in trauma center.

   Non-Surgical Stay   Enter the per diem amount allowed for non surgical stay in trauma center.

   Stop Loss %   Enter the stop loss percentage.

   OK   Select to save the changes.

   Cancel   Select to cancel the process and close the Hospital Per Diem Values window.

7. Complete fields on the Hospital Per Diem Values window: Outpatient Charges tab, as shown below.

   Hospital Care %   Enter the percentage amount allowed for hospital care.

   Sched. Surgery %   Enter the percentage amount allowed for scheduled surgery.

   OK   Select to save the changes.

   Cancel   Select to cancel the process and close the Hospital Per Diem Values window.

8. Complete fields on the Hospital Per Diem Values window: Ambulatory Surgical Centers tab, as shown below.

   Billed < Fee Sched   Enter the amount to be charged when the billed amount is less than the fee schedule.

   Not in Fee Sched   Enter the amount to be charged when the billed amount is not in the fee schedule.

   Billed >= Fee Sched   Enter the amount to be charged when the billed amount is more than the fee schedule.

   Fee Schedule   From the drop down list, select a fee schedule table.

   OK   Select to save the changes.

   Cancel   Select to cancel the current process and close the Hospital Per Diem Values window.

9. Select the OK button.

Bill Repricing Overview

Use the Bill Review System (BRS) for bill repricing. The system compares an invoice item to tables of established fees. The fee tables indicate a statewide standard fee or a range of fees paid for the service in the past. BRS adjusts the payment accordingly.

For example, you receive a $400 bill for a Workers' Compensation claim for a broken leg. When you enter the bill into BRS and the system compares it against the UCR table, the indicator (set at the 80th percentile) returns an average cost of $195 for MD's rates in that zip code and automatically adjusts the bill. If you switch the percentile modifier to a higher or lower percentile, the standard fee automatically changes.

Your payments are entirely defensible because the repricing adheres to state or national standards.

Bill repricing services are a part of cost containment . Your organization may want to use BRS along with other cost-containment efforts, such as third-party utilization reviews. You can use BRS for medical, dental and legal fee schedules, as well as any other type of fee schedule that you wish to build.

Billing Review System Overview

The Bill Review System (BRS) is an add-on RISKMASTER application for bill repricing. BRS plugs-in to RISKMASTER and shares the same database. It has a seamless integration with the Funds Management module .

After you enter a payment on the RISKMASTER Funds Management window, you can use the Bill Review System, to enter one or more items from the bill. When you return to the Funds Management window, RISKMASTER displays each bill item and the calculated amount for payment

The Bill Review System enables your organization to implement in-house cost containment as a seamless step in bill paying with RISKMASTER. It adjudicates each invoice based on the standard fee schedule, your organization uses. BRS uses the fee schedule to calculate a payment, just as a third-party service provider.

BRS displays the calculated payment as the Amount Allowed and the Amount Saved over the invoice. You can enter a percentage value or a dollar amount in BRS, to reduce the value of the Amount Allowed based on the percentage or amount. You can also select a code to automatically generate an Explanation of Benefits (EOB) letter for the payee .

Point Claim Balancing

Point Claim Balancing Overview

Using this feature you can identify the differences in the financial data in the POINT Policy system and the RISKMASTER Accelerator.

The utility imports records from POINT into RISKMASTER tables and then an executable file is run through Taskmanager to create reports that detail the out of balance data for the reserves and payments. The reports are created in Microsoft Excel format. However you can also create reports in Business Intelligence from rmA tables to identify out of balance records.

The Policy System Interface must be configured with RISKMASTER Accelerator to use this feature.

IBM I series should be installed at server in case POINT IN and POINT IN J system use DB2.

Records are imported based on the Date of Loss. All records having Date of Loss after or on the specified date are imported from the Policy system into rmA.

You can schedule the claim balancing utility only for the policy systems for which the Financial Upload setting is turned on in the Policy System Setup. The utility uses the connection details provided on the Policy System Setup. Microsoft Excel should be installed on the server to run this utility.

To Add New Data Source

1. On the Policy System Web Settings, from the Data DSN field, select the Add button.
2. The Add New Data Source window opens.

3. Select the required ODBC driver which you want to use to create DSN.
4. Select the Next button.

5. Enter the details to connect to the database server as shown in table below:

Server name	Enter the name of the database server
Database Name	Enter the database name which you want to connect to
Library List (comma Separated)	Enter the list of libraries if the Database driver is iSeries DB2 driver.
Login User Name	Enter the username used to connect to database
Login Password	Enter the password to connect to database.

6. Select the Next button.

7. The database wizard validates the data source information.
8. Once the information is validated the data source is saved.

To Schedule a Claim Balancing Task

1. From the View Scheduled Tasks window, select the [Schedule A New Task] button. The View Scheduled Task window opens.

2. From the Task Type drop down list, select the type of task as Claim Balancing.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as required.
5. Complete the fields on the Schedule a Task window: . as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.
Interval	Enter the interval after which you want to repeat the task.

Claim Balancing Related Parameters:

Select Policy System	From the dropdown select the external policy system from which you want to generate the out of balance reports.
Date of Claim (Claims on/after this date will be balanced)	Select a date after which the claim records will be balanced.
Select Claim Type	Select the type of the claim records you want to generate the out of balance report for.
Send the out of balance Report via Email	Select the check box if you want to send the generated report via email
	Note: The report will be sent to the email address of the logged in user. The SMTP server settings and user's email address should be configured in the Security Management System.

Scheduler Related Parameters:

Admin User ID	Enter the admin user ID for the scheduling the task.
	Only the Users having administrator rights in Security Management System can schedule the task. In case the logged in user does not have admin rights then they can schedule the task by entering admin user ID and Password.
Admin Password	Enter the password to schedule the task.
	When the logged in user is BES User and does not have admin rights on the database user needs to enter the password.

Save	Select the button to save the changes.
Cancel	Select the button to close the window without saving the changes.

6. Select the Save button.

    The task is scheduled to run periodically based on the defined interval.

To Schedule Claim Balancing Task using the Standalone Utility

Apart from scheduling the claim balancing task in TASK Manager, you can also run the claim balancing task by simply double clicking on the claim balancy(exe) executable file. Similarly task can also be schedules from Microsoft Windows Task Scheduler.

To rum Claim Balancing Utility as Standalone

1. Locate WCFService\bin folder
2. Look for ClaimBalancing.exe and ClaimBalancing.exe.config file
3. Open ClaimBalancing.exe.config file
4. Locate the section <ClaimBalancingInputParams>

    <ClaimBalancingInputParams

    <add key="RMXLoginName" value="abk"/>

    <add key="RMXDSNName" value="RMA141_POLICY"/>

    <add key="PolicySystemName" value="POINT_RM1"/>

    <add key="DateOfLoss" value="0"/>

    <add key="RMAClaimTypeCodeShortCode" value="0"/>

    <add key="SendReportViaEmail" value="False"/>

    <add key="AdminUserId" value=""/>

    <add key="AdminPassword" value=""/>

    </ClaimBalancingInputParams>

5. Enter Parameters for each key as shown in table:

Key	Is required?	Description
RMXLoginName	Yes	RMA Login Name
RMXDSNName	Yes	Name of the data source for which claim balancing utility will be executed
PolicySystemName	Yes	Name of the Policy System
DateOfLoss	No. Default value must be "0" (Zero)	Claims on or after this date will be balanced. Date if given should be in YYYYMMDD format
RMAClaimTypeShortCode :	No. Default value must be "0" (Zero)	RMA Claims short code to filter data

SendReportViaEmail	Yes. Value can be either "True" or "False"	If value is true, an email with OOB report as attachment will be sent to the user's email address
AdminUserID	No. Default value must be blank	If the RMA login does not have admin rights in SMS, the Admin User ID password can be given.
AdminPassword	No. Default value must be blank	If the RMA login does not have admin rights in SMS, the Admin User ID password can be given.

6. Once the input parameters are saved in the ClaimBalancing.exe.config file, close the file
7. Double click on ClaimBalancing.EXE to run the utility

Policy System Web Settings Window

The Policy System Web Settings allows user to enter the necessary information about the communication framework for each policy system.

To open

■   From the Policy System Setup window, select the [ ] button.

Field definitions

Policy System Name   Enter a policy system name that you want to set for a claim.

Domain   Enter the domain name.

License   Enter the license number.

Proxy   Enter the proxy server address.

User Name   Enter the user name to use to access this data source.

Password   Enter the case-sensitive password information.

Confirm Password   Re-enter the password.

URL Parameter   Enter the URL parameter.

Financial upload   Select the check box if you to upload financial data for the policy system.

Default Policy System   Select the check box if you want to select the default policy system.

OK   Select the button to save the new policy system web settings and display the settings in the Policy System Setup frame on the Policy System Setup window.

Cancel	Select the button to close the window without saving the settings you entered.
Change Password	Select the button to change the password.
Mapping Table Prefix	Enter the prefix of the mapping code table used for mapping external policy system codes to rma codes.
Policy System Name	Enter the name of the policy system used for the policy download.
Version	Enter the version of the policy system used for policy download.
Client File Setting	Select the check box if policy system is configured to client file setting as ON
Use RMX User for CFW	Select the checkbox if you want to use RMX user name for the
CFW User Name	Enter the User name for the policy interface (Applicable when setting "Use RMX User For CFW" is disable.)
Location Company	Select the name of the company associated woith the policy at the ploicy location.
Master Company	Select the name of the master company associated with the policy.
Business Entities Code	Enter the codes for the business entities used in external policies. The codes should be in CSV (comma separated value) format.
Exclude Major Peril	Enter the codes or names for major risks or perils which you want to exclude while policy system setup . The codes should be in CSV (comma separated value) format.
Exclude Additional Interests	Enter the codes or names for the various interests f which you want to exclude while policy system setup. The codes should be in CSV (comma separated value) format.

To Work with Policy System Download

To work with Policy System downloads, you must first activate the Policy System Interface by selecting the Use Policy System Interface check box on the General System Parameter Setup window: Carrier Claim Settings tab.

Note: **You can also download policy from a claim window**.

1. From the main menu, select Maintenance.
   The Maintenance menu opens.

2. From the Maintenance menu, choose Policy System Download.
   The Policy System Download window opens and a Policy System Download link displays under Maintenance node in the navigation tree.

3. Complete the fields on the Policy System Download window , as shown below .

   Policy Search Criteria

System Name	From the drop down list, select the name of the policy system interfaceyou want to download policy from or want to search policy records for.
Policy Number	Enter a unique identifying number for the policy.
Policy Symbol/Name	Enter a unique identifying name for the policy.
Module:	Enter the name of the policy module for which you want to search policy records from policy system.
Policy State	Enter the name of the state which policy belongs to.
Line Of Business	Enter the line of business for which you want to search the policy records/.
Location Company	Enter the name of the company at the policy location for which you want to search policy records.
Insured Zip	Enter the Zip code of the location of person insured in policy.
Customer Number	Enter the unique customer number for the policy.
Master Company	Enter the name of the master company responsible for policy.
Agent	Enter the user defined code number and name of the agency responsible for handling the insurance policy. This information downloads from the host system.
Insured City	Enter the name of the city of the person insured in policy.
Insured SSN	Enter the Social Security Number of the person insured in policy.
Data DSN	Enter the data source name of the database to connect to the policy system. To configure the DSN select the Add button next to the field to open the Add New Data Source window. To clear the contents of the DSN, select the Clear button.
Copy Data DSN to Client DSN	Select the checkbox if the data DSN and the client DSN are same.
Client DSN	Enter the client data source used to connect to the policy system and download the records from the external policy system.
Group Number	Enter the unique number of the policy group.
Insured Last Name	Enter the last name of the person insured in policy.

Insured First Name:	Enter the first name of the person insured in policy.
Date of Loss	Enter the date on which incident or event occurred or select the ▦ button to select from a calendar.
Submit Query	Select to search the database and display the results.
Clear	Select to clear all the unsaved values on the window.

To Download Policy from Claim window

1. Search and open the claim for which you want to download the policy.
2. Select the Download Policy button next to the Policy Name field.
   Note: The system validates the Date of claim, date of event etc. If claim is new then you must first enter values for these fields.
   The Policy System Search window opens.
3. Enter the search criteria and then from the Lookup results window select the required policy.
4. From the list of policies, select a policy and select the Inquiry button to view the details of the selected policy.
5. You can also download the selected policy (Including related entities, units & coverages) by selecting the Save button
   Once the policy is downloaded, system checks the data on the claim form against the policy being attached.
6. If it is validated then system will attach the policy to the claim if not a validation message displays that policy information does not match to the claim.
7. Select the Save button on the Claim window, to check that the policy is valid for the claim.

   > Note: If multiple policies are attached to the claim then on claim save system will validate each policy and incase some policies are not qualified system will display the validation message with invalid policy names.

Policy Management (Previously Enhanced Policy)

Policy Management System Overview

Use the Policy Management System to provide premium quotes to customers and to convert quotes into policies. With Policy Management System you can monitor, amend, audit, cancel, and manually renew or non-renew Auto Liability, Property, General Liability and Workers Compensation policies. In this you first need to create a quote and then convert the quote into a policy.

Policy Management System is an add-on module that must be purchased separately and is not included with the Base RISKMASTER X package. The Policy Management System add-on module replaces the Policy Tracking module in .

When you purchase Policy Management System, CSC gives you an activation code. Before you can use Policy Management System with , you must use the activation code to activate Policy Management System in the Utilities module.

Policy Management System lets you:

- Process quote information and <u>convert quotes to policies</u>

- <u>Add exposures</u> and <u>coverages</u> to quotes and policies

- <u>Calculate premiums</u> based on actuarial rates and discounts

- Audit exposures and coverages and recalculate the premium rate based on audited information.

    Note: You cannot use existing policy records and claims with Policy Management System. You must convert your legacy policy data before you can use the data with Policy Management System.

Tips

To Activate the Policy Management System

1. From the main menu, select Utilities.
    The Utilities menu opens.

2. From the Utilities menu, choose Managers.

3. From the Managers menu, choose General System Parameter Setup.
    The General System Parameter Setup window opens and a General System Parameter Setup link displays under Utilities node in the navigation tree.

4. On the System Settings tab, in the General Parameters frame, select the Use Policy Management System check box.
    An Activation Code Required window opens.

5.   Enter the RISKMASTER Policy Management System Activation Code for your organization.

Note: Contact CSC Support for your activation code. CSC provides you with the activation code when you purchase the Policy Management System module.

6.   Select OK.

On the System Settings tab, the Use Policy Management System check box, displays as selected.

7.   From the toolbar, select [icon].

8.   Close the System Setup Parameters window.

Note: You may need to log out and then log in again to view the Policy Management System, in Maintenance menu.

Quote

To Add a Coverage to a Quote

You can add, update and delete coverage for a quote with a Quoted status. You can attach coverages at the department level. You can also add, edit and delete coverage for policies based on the current type of transaction and the term status.

To Add a Coverage

1.   From the Policy menu, choose the desired policy type.

The <Policy name> window opens and a <Policy name> link displays under Policy in the navigation tree.

2.   On the Quote tab, from the Quote Name field, select the [icon] button.
The Standard Policy Management Search window opens.

3.   Search for the quote to which you want to add a coverage.
The quote you selected opens in the policy window.

4.   Select the Coverages tab.

5.   Select the Add New button [icon].
The Coverages window opens.

6. Complete the fields on the Coverages window , as shown below .

Coverage Type

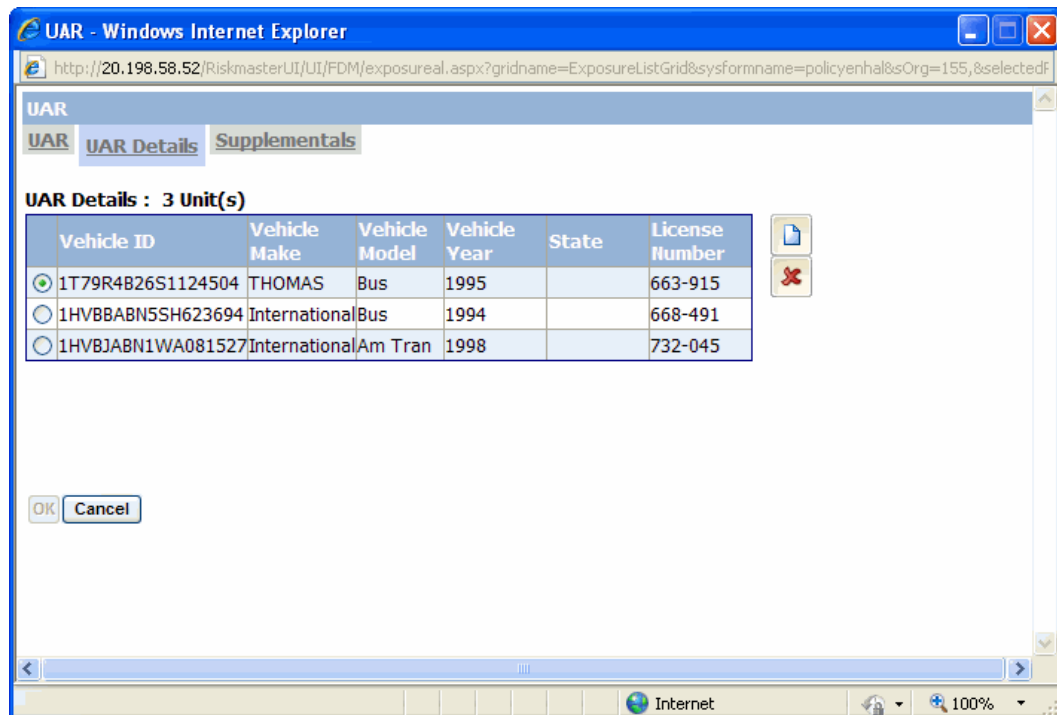Enter the code for the coverage type or select the [🔍] button to select from the Codes Selection window.

Coverage Status

Enter the code for the coverage status or select the [🔍] button to select from the Codes Selection window.

Effective Date   Enter the date on which the coverage comes into effective.

Expiration Date   Enter the date till which the coverage is effective.

Policy Limit   Enter the total maximum coverage amount for all the claims covered by the policy.

Occurrence Limit   Enter the total maximum coverage amount for all claims related to a single event that the policy can cover.

Claim Limit   Enter the maximum coverage amount for any single claim within an event that the policy can cover.

Total Payments   Enter the total amount of the payments already paid by the policy. As you make additional payments under the policy, this amount automatically increases.

When the total payments reach the policy limit, the next higher lever of coverage is selected from the Next Policy field, and additional payments are made against the next policy.

Deductible   Enter the deductible you need to pay for the policy.

Self Insured Retention	Enter any Self-Insured Retention (SIR) that you need to pay for the policy.
Next Policy	Enter the next higher layer of coverage or select the `...` button to open the Standard Policy Management Search and search the next policy.
	This policy will be used when the policy limit for the current policy is reached.
Cancel Notice (Days)	Enter the days of prior notice you want to receive before the coverage is cancelled.
Notification User	Enter the person responsible for renewing policies or select the button to select from the Codes Selection window.
	RISKMASTER will send a diary notification to this user when the coverage is nearing expiration.
Broker Last Name	Enter the insurance broker's last name.
Exceptions	Select the button to open the RISKMASTER Editor and enter any exceptions for the coverage.
UAR Lists	Select the `...` button to open the list of vehicles added on UAR window: UAR Details tab.
	This field displays only for Property and Auto Liability policy.
Remarks	Select the button to open the RISKMASTER Editor and enter any additional comments.

7. Select OK.

   RISKMASTER adds the coverage to the list of coverages on the Coverages tab.

To Add an Exposure to a Quote

You need to set up exposure rates in RISKMASTER Utilities on the Rate Setup tab before you can attach the exposure rate information to the quote. You can add, update and delete exposures for quotes with a Quoted status. You can add, edit and delete exposures for policies based on the current type of transaction and the term status. You can also attach exposures at the department level.

In case of General Liability and Workers Compensation, exposure information is entered in UAR/Exposure tab whereas for Auto Liability and Property, exposure information is entered in the UAR tab.

To Add an Exposure Information in General Liability and Workers Compensation policy

1. From the Policy menu, choose either General Liability or Workers Compensation as the policy type.

   The <Policy name> window opens and a <Policy name> link displays under Policy in the navigation tree.

2. On the Quote tab, from the Quote Name field, select the `...` button.

   The Standard Policy Management Search window opens.

3. Search for the quote to which you want to add an exposure.

   The quote you selected opens in the policy window.

4.   Select the Exposures tab.

5.   Select the Add New button .
      The Exposure window opens.

6.   Complete the fields on the Exposure window , as shown below .

Exposure Type

Enter the code for the exposure type or select the button to select from the Codes Selection window.

Exposure Status

Enter the code for the exposure status or select the button to select from the Codes Selection window.

Effective Date   Enter the date on which the exposure comes into effective.

Expiration Date   Enter the date till which the exposure is effective.

Annual Exposure Amount   Enter the exposure amount.

Rate   Displays the rate corresponding to the exposure type from the rate table.

Base Rate   Displays the base rate corresponding to the exposure type from the rate table.

Base rate is applicable only to General Liability claims and indicates the percentage of population used for rate calculation.

Est. Premium Amount	Displays the estimated calculated premium amount. You cannot edit this premium amount.
Coverage Type	Enter the code for the coverage type or select the button to select from the Codes Selection window.
Department	Enter the department for which the exposure is effective or select the button to select from the Org. Hierarchy window.
Date Amended	Displays the date on which you edited the exposure.
Premium Adjustment	Displays the dollar amount of premium adjustment.
Pro-Rata Annual Premium	Displays the dollar amount of pro-rata annual premium.
Full Annual Premium	Displays the dollar amount of full annual premium.
Exceptions	Select the button to open the RISKMASTER Editor and enter any exceptions for the exposure.
Remarks	Select the button to open the RISKMASTER Editor and enter any additional comments.

7. Select OK.
   RISKMASTER adds the exposure to the list of exposures on the Exposures tab.

To Add an Exposure Information in Property policy

1. From the Policy menu, choose Property as the policy type.
   The Property Policy window opens and a Property link displays under Policy in the navigation tree.

2. On the Quote tab, from the Quote Name field, select the button.
   The Standard Policy Management Search window opens.

3. Search for the quote to which you want to add an exposure.
   The quote you selected opens in the policy window.

4. Select the UAR tab.

5. Select the Add New button .
   The UAR window: UAR tab opens.

6.   Complete the fields on the UAR window: UAR tab as shown below.

Property Type   Enter the type of property for which you want enter the unit type code or select the button to select the code from the Code Selection window.

UAR Status   Displays the status of Unit at Risk.

Number of Units   Enter the number of units.

Rate   Displays the rate corresponding to the Unit at Risk type from the rate table.

Base rate   Displays the base rate corresponding to the Unit at Risk type from the rate table.

Department   Enter the department for which the Unit at Risk is effective or select the button to select from the Org. Hierarchy window.

Coverage Type   Enter the code for the coverage type or select the button to select from the Codes Selection window.

Date Amended   Displays the date on which you edited the exposure.

Premium Adjustment   Displays the dollar amount of premium adjustment.

Full Annual Premium   Displays the dollar amount of full annual premium.

Pro-Rate Annual Premium   Displays the dollar amount of pro-rata annual premium.

Exceptions   Select the ⬚ button to open the RISKMASTER Editor and enter any exceptions for the exposure.

Remarks   Select the ⬚ button to open the RISKMASTER Editor and enter any additional comments.

Effective Date   Enter the date on which the Unit at Risk comes into effective.

Expiration Date   Enter the date till which the Unit at Risk is effective.

OK   Select to save the Unit at Risk and display on the UAR tab.

Cancel   Select to close the window without saving the exposure.

7.   Select the UAR Details tab.
     The UAR window: UAR Details tab opens.
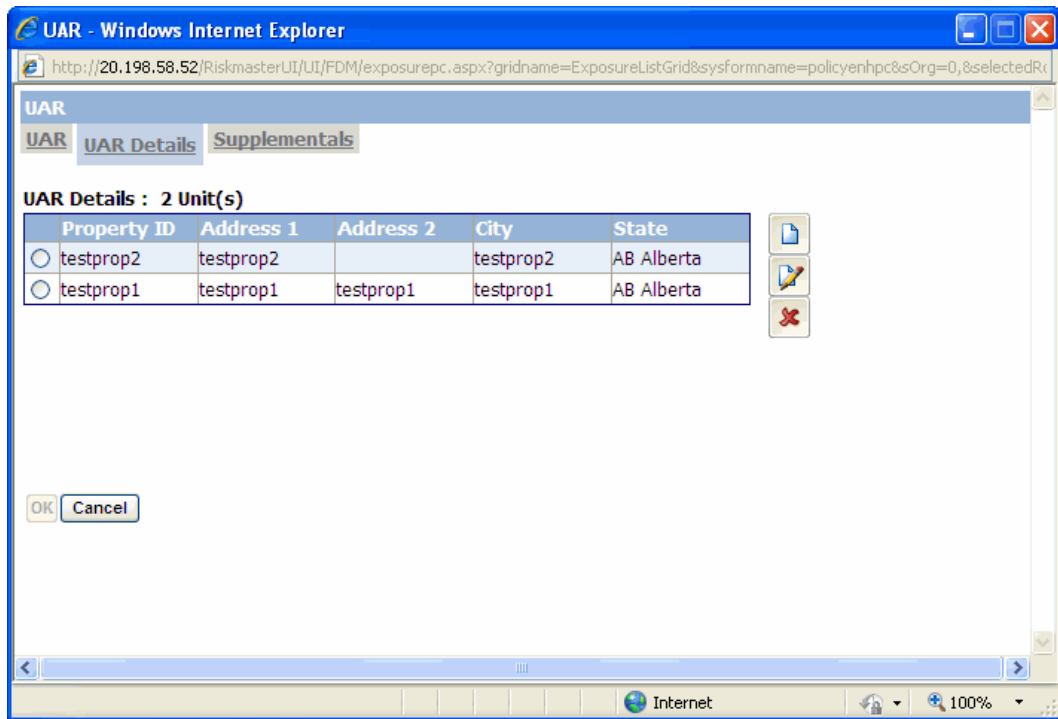
8.   Select the Add New button ⬚ .

The Property UAR Details window: UAR Details tab opens.

9.   Complete the fields on the Property UAR Details window: UAR Details tab, as shown below.

10.   In the Property ID field, enter the property identification number of select the button to search for the property ID.

11.   The Address fields will display all the information corresponding to the property ID.

12.   Select the Schedule tab.

The Property UAR Details window: Schedule tab opens.
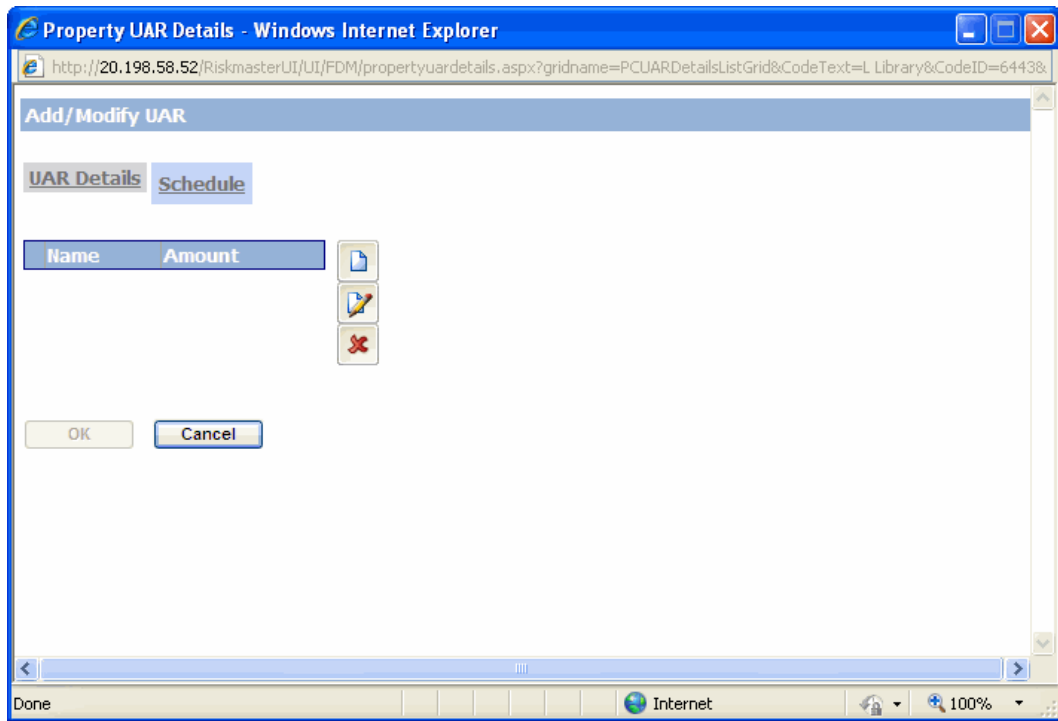
13. Select the Add New button .

The Schedule Details window opens.

14. In the Name field, enter the name that you want to assign to the schedule.
15. In the Amount field, enter the corresponding amount for the schedule.
16. Select the OK button.

To Add an Exposure Information in Auto Liability policy

1. From the Policy menu, choose Property as the policy type.
   The Property Policy window opens and a Property link displays under Policy in the navigation tree.

2. On the Quote tab, from the Quote Name field, select the ⁛ button.
   The Standard Policy Management Search window opens.

3. Search for the quote to which you want to add an exposure.
   The quote you selected opens in the policy window.

4. Select the UAR tab.

5. Select the Add New button 🗋 .
   The UAR window: UAR tab opens.
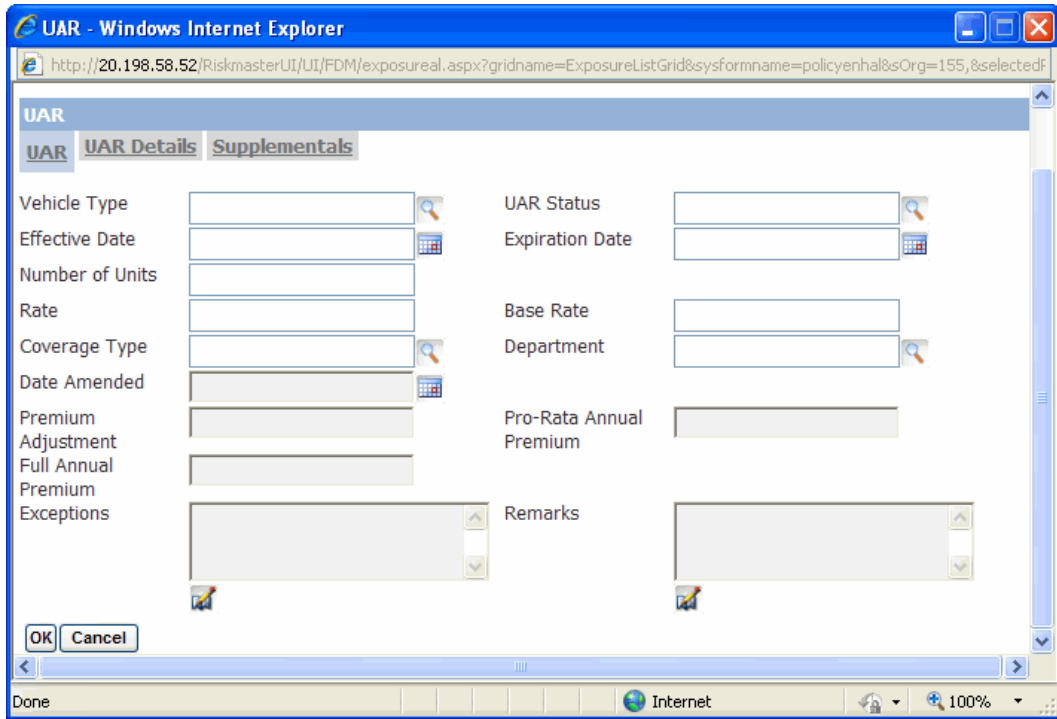
6. Complete the fields on the UAR window: UAR tab as shown below.

Vehicle Type	Enter the type of vehicle for which you want enter the unit type code or select the button to select the code from the Code Selection window.
UAR Status	Displays the status of Unit at Risk.
Number of Units	Enter the number of units of vehicle type.
Rate	Displays the rate corresponding to the Unit at Risk type from the rate table.
Base rate	Displays the base rate corresponding to the Unit at Risk type from the rate table.
Department	Enter the department for which the Unit at Risk is effective or select the button to select from the Org. Hierarchy window.
Coverage Type	Enter the code for the coverage type or select the button to select from the Codes Selection window.
Date Amended	Displays the date on which you edited the exposure.
Premium Adjustment	Displays the dollar amount of premium adjustment.

Full Annual Premium	Displays the dollar amount of full annual premium.
Pro-Rate Annual Premium	Displays the dollar amount of pro-rata annual premium.
Exceptions	Select the ![icon] button to open the RISKMASTER Editor and enter any exceptions for the exposure.
Remarks	Select the ![icon] button to open the RISKMASTER Editor and enter any additional comments.
Effective Date	Enter the date on which the Unit at Risk comes into effective.
Expiration Date	Enter the date till which the Unit at Risk is effective.
OK	Select to save the Unit at Risk and display on the UAR tab.
Cancel	Select to close the window without saving the exposure.

7.   Select the UAR Details tab.

8.   Select the Add New ![button] button.
      The Vehicle UAR Details window opens.
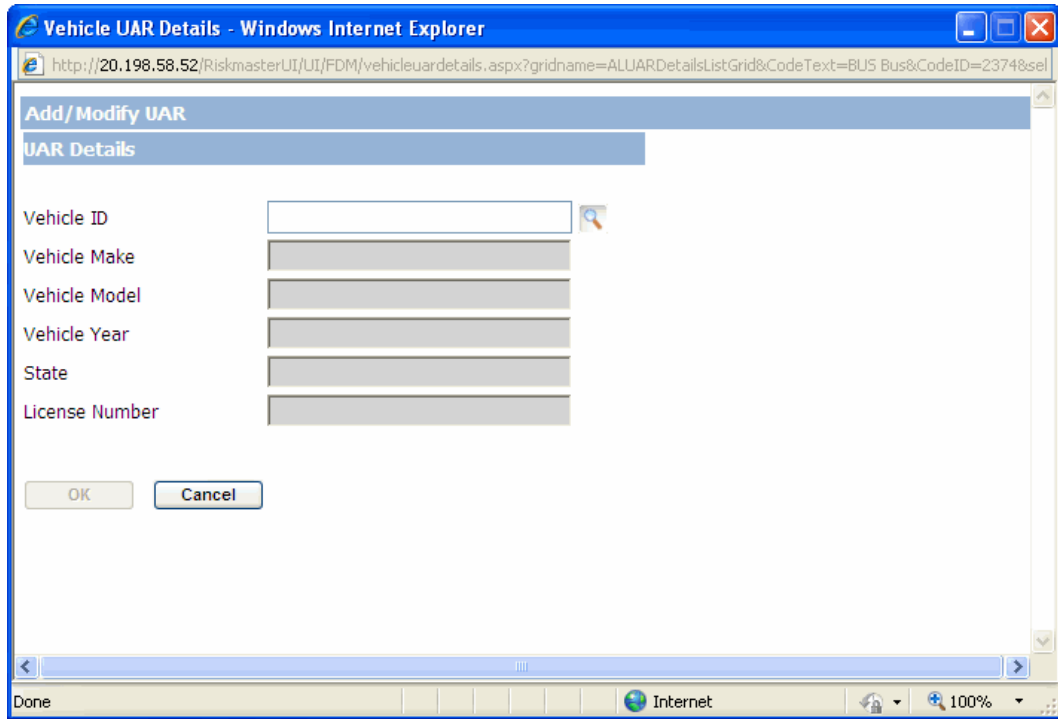
9. In the Vehicle ID field, enter the vehicle identification number or select the button to search for the vehicle record.

10. The Vehicle Make field, displays the manufacturing year of the vehicle you entered or selected.

11. The Vehicle Model field displays the model number of the vehicle you entered or selected.

12. The Vehicle Year field displays the year of manufacturing of the vehicle you entered or selected.

13. The State field displays the state to which the vehicle belongs.

14. The License Number field displays the vehicle license number.

15. Select the OK button to save the UAR details of the vehicle.

To Convert a Quote into a Policy

To create a policy you need to first create a quote and then convert the quote into a policy. When you convert a quote to a policy, RISKMASTER copies the existing quote information to a policy. All field names on the Policy Management window automatically change to reflect the policy. After RISKMASTER converts a quote to a policy, you cannot change the Policy Name, but you can update the Policy Number.

1. From the main menu, select Policy.

   The Policy menu opens.

2. From the Policy menu, choose a policy type.
   The <Policy name> window opens and a <Policy name> link displays under Policy node in the navigation tree.

3. On the Quote tab, from the Quote Name field, select the ▪▪▪ button.
   The Standard Policy Management Search window opens.

4. Search for the quote you want to covert to a policy.
   The quote you selected opens in the Policy Management window.

5. On the Quote tab, select the Convert to Policy button.

    RISKMASTER clones the quote information to a policy. All field names automatically change to reflect a policy, and the Policy Name field becomes disabled.

To Create a Quote

Quotes are policies in draft format. You can create quotes for policies and provide calculated premium quotes to your customers. In the Policy Management System, you cannot directly create a policy, you must first create a quote and then convert the quote into a policy.

To create a quote

1. From the main menu, select Policy.

    The Policy menu opens.

2. From the Policy menu, choose a policy type.

    The <Policy name> window opens and a <Policy name> link displays under Policy node in the navigation tree.

3. Select and complete the fields on the Quote tab, as shown below.

Quote	By default, this option displays as selected when you open the Policy Management window.
	The field names on the window display as Quote Name, Quote Number and so on.
Policy	Displays as selected after you convert a quote to policy.
	The field names on the window displays as Policy Name, Policy Number and so on.
Quote Name	Enter a quote name or select the ⋯ to open the Standard Policy Management Search window and select an existing quote.
Quote Number	Enter a quote number.
Quote Status	Displays the quote status. By default, the status displays as Quoted.
Quote Type	Enter the code that best describes the line of business or select the 🔍 button to select from the Codes Selection window.

Total Billed Premium	Displays the calculated premium based on the rates you enter in RISKMASTER Utilities.
	You cannot change the total billed premium that displays.
Bank Account	From the drop down list, select the bank account in which you want to deposit the premium for this policy.
Primary Policy	Select the check box if to mark the policy as the primary policy.
Event-Made Coverage	Select the option if you want to use the event date to determine coverage.
Claim-Made Coverage	Select the option if you want to use the claim date to determine coverage.
Issue Date	Enter the date when you want to issue the policy.
Review Date	Enter the date when you want to review the policy.
Effective Date	Enter the date on which you the policy will come into effect or select the button to select from a calendar.
Expiration Date	Enter the date on which you want the policy to expire or select the button to select from a calendar.
Cancel Date	If the policy was cancelled, displays the cancellation date.
	This field is only active for a policy, and not for a quote.
Retro Date	Enter the date you want the policy to cover any claim occurring after this date.
Cancel Reason	If the policy was cancelled, displays the reason for cancellation.
	This field is only active for a policy, and not for a quote.
Non-Renew Reason	Displays the reason for non-renewal of policy.
	This field is only active for a policy, and not for a quote.
Last Updated	Displays the date when you previously changed and saved a policy.
	This field is only active for a policy, and not for a quote.
Last User	Displays the name of the user who last updated a policy.
	This field is only active for a policy, and not for a quote.
Earned Premium	Select to open the Calculate Earned Premium window and calculate earned premium for the current policy.

4. Select and complete the fields on the Insurer tab, as shown below.

Insurer

Enter the insurer name or select the ••• button to open the Standard Entity Search window and select an insurer.

Contact

Enter the contact persons's name for this insurer.

Office Phone

Enter the insurer's office phone number.

Alt. Phone

Enter an additional phone number for the insurer, if necessary.

Fax

Enter the insurer's office fax number.

Insured

Enter the organization level that the policy covers, or select the 🔍 button to select from the organization hierarchy. You can enter multiple organization levels in this field.

Note: To avoid unnecessary data in the organizational hierarchy, you may not complete this tab during the quote process. However, when you convert a quote to a policy RISKMASTER will prompt you to complete this tab.

5.   To display policy MCO on the MCO tab, select the MCO button and complete the fields on the Policy MCO window, as shown below.

Note: Before you enter MCO data, you have to add the MCO entity into your database.

Policy MCO	Enter the Managed Care Organization's name or select the ••• button to open the Standard Entity Search and search for a MCO.
Begin Date	Enter the date on which the policy comes into effect or select the button to select from a calendar.
End Date	Enter the date on which the policy expires or select the button to select from a calendar.
Back to Policy	Select to open the Policy Management window.

6.   Select and complete the fields on the Broker/Agent tab, as shown below.

Last Name	Enter the broker's last name or select the ••• button to open the Standard Entity Search window and select a broker.
First Name	Enter the broker's first name.
Address	Enter the broker's address.
Office Phone	Enter the broker's phone number.
Alt. Phone	Enter any additional phone number for the broker.
Fax	Enter the broker's fax number.
Email Type	Enter the code that best describes the broker's email type, or select the 🔍 button to select from a Codes Selection window.
Email Address	Enter the broker's email address.
Zip	Enter the broker's zip code.
Tax ID	Enter the broker's tax ID.

Broker Firm

Enter the broker's firm or select the ··· button to open the Standard Entity Search window and select a broker firm.

7. Select and complete the fields on the Coverages tab, as shown below.

Policy Management [policy_final]

| Policy | Insurer | MCO | Broker/Agent | Coverages | Exposures | Prem. Calc. | Trans. History | Supplementals |

Last Name			Office Phone	
First Name			Alt. Phone	
Address			Fax	
			Email Type	
City			Email Address	
State			Zip	
Country			Tax ID	
			Broker Firm	

Policy Coverages   Displays a list of coverage attached to the quote or policy.

Select to open the Coverages window .

Select a coverage record from the list, and select the button to open the Coverages window and edit the information in the fields.

Select a coverage record from the list, and select the button to delete the coverage.

8. Select and complete the fields on the Exposures tab, as shown below.

Policy Management [policy_final]

| Policy | Insurer | MCO | Broker/Agent | Coverages | Exposures | Prem. Calc. | Trans. History | Supplementals | Billing |

Policy Exposures :

Type	Description	Status	Amount	Rate	Pro-Rata Annual Premium	Amended Date	Premium Adjustment	Effective Date	Expiration Date	Org Level
○ code1	code1	Accepted	10000	$0.00	$0.00		$0.00	04/01/2009	04/30/2009	

Exposure Sum $10,000.00   Manual Premium $0.00

Policy Exposures   Displays a list of exposures attached to the quote or policy.

Select to open the Exposure window .

Select an exposure record from the list, and select the button to open the Exposure window and edit the information in the fields.

Select an exposure record from the list, and select the button to delete the exposure.

Exposure Sum   Displays the total dollar amount of exposure.

Manual Premium   Displays the manually calculated premium for the exposure.

9. Select and view and complete the fields on the Prem. Calc. tab, as shown below.

Manual Premium   Displays the manual premium calculated on the Exposure tab.

Exp. Mod. Factor   Enter the Experience Modified Factor for Workers' Compensation claims.

> RISKMASTER multiplies the Manual Premium amount with the Exp Mod Factor to give you the Modified Premium. For General Liability claims and Vehicle Accident claims, where Exp Mod Factor, is not applicable, the Manual Premium = Modified Premium.

Modified Premium   Displays the modified premium based on the Exp. Mod. Factor.

> This field is only available for Workers' Compensation policies. The modified premium is the first discount tier.

Audited Premium   Displays the annualized premium for audited exposures for Workers' Compensation policies.

> This is a calculated premium field populated when an audit is completed. You cannot edit this field.

Waive Transaction Premium?   Select the check box if you do not want to include the transaction premium for this transaction in the total billed premium.

Comments   Select to open the Waive Comment window and enter comments.

Estimated Premium   Displays the annualized premium amount after applying all discounts throughout the rating tiers as specified in the Policy Management Setup in RISKMASTER Utilities.

> You cannot edit the estimated premium. When you change any of the exposures, coverages or discount values, RISKMASTER recalculates the estimated premium.

Transaction Tax   Displays the transaction tax for the selected line of business and state.

> This is calculated based on the tax rate you select in Utilities, on the Add/Modify Tax window.

Transaction Premium   Displays the transaction premium amount, which is the total change in the estimated premium during the current transaction.

> This is a calculated, non-editable field.

Total Billed Premium   Displays the total premium amount billed to the customer.

> You cannot edit this field. If the estimated premium amount is less than the minimum billed threshold amount specified in Utilities, then the minimum billed threshold amount is used as the total billed premium amount. If the estimated premium amount is greater than or equal to the minimum billed threshold, then the Total Billed Premium and Estimated Premium amount will display the calculated premium amount.

10. Select and complete the fields on the Trans. History tab, as shown below.

Transactions   Displays the type and status of the transaction and premium values.

Accept   Select a transaction with a Provisional status and then select the button to accept the transaction.

Delete   Select a transaction and then select the button to delete the transaction.

11. Select and complete the fields on the Supplementals tab.
12. Select and complete the fields on the Billing tab.

Note: If you activate the policy billing system, then to create a quote, or convert a quote to policy, you have to complete the Billing Rule Code and Bill To Type field on the Policy Management window: Billing tab.

Pay Plan Code	Select the `...` button to open the Select Pay Plan window and select the pay plan for the policy.
	Pay Plan displays based on the jurisdiction and line of business of the policy.
Billing Rule Code	Select the `...` button to open the Select a Billing Rule window and select the billing rule for the policy.
Do Not Bill	Select the check box if you do not want to create a bill.
Billing Info	
Bill To Type	Enter the entity type to whom you want to send the bill, or select the button to select from the Codes Selection window.
Override Billing Address	Select the check box if you want to override the billing address with the billing address you enter in the New Billing Info frame.
Last Name	Enter the last name of the entity to whom you want to send the bill, or select the `...` button to open the Standard Entity Search window and select the entity.
First Name	Displays the entity's first name.
Address, Zip, Country	Displays the entity's address.
New Billing Info	
Last Name	Enter the last name of the entity to whom you want to send the bill.
First Name	Enter the entity's first name.
Address, Zip, Country	Displays the entity's address.

13. From the toolbar, select the Save button .

    RISKMASTER creates a quote and saves it in your database.

To Edit a Quote

Before you convert a quote to a policy you can make changes to the quote. You can only make changes to a quote with a Quoted status. After the quote status changes to Converted you can review the quote but you cannot edit it. If you make exposure or coverage changes to a quote that affect the premium, RISKMASTER will invoke all rating.

To Edit a Quote:

1. From the main menu, select Policy.

   The Policy menu opens.

2. From the Policy menu, choose the policy type.
   The <Policy name> window opens and a <Policy name> link displays under Policy node in the navigation tree.

3. On the Quote tab, from the Quote Name field, select the `...` button.
   The Standard Policy Management Search window opens.

4. Search for the quote you want to modify.

    The quote you selected opens in the Policy Management window.

5. Edit the information in the fields.

6. From the toolbar, select the Save button .

    RISKMASTER saves your changes and leaves the quote status as Quoted.

To Schedule Policy Diaries

You can schedule auto diaries to receive information about upcoming policy transactions. You can set up automatic diaries in RISKMASTER Utilities using the Auto Diary wizard.

To schedule a policy diary

1. From the main menu, select Utilities.

    The Utilities menu opens.

2. From the Utilities menu, choose Tools & Designers.

3. From the Tools & Designers menu, choose Auto Diary Setup.

    The WPA Auto Diary Setup window opens.

4. Select the New button.

    The Auto Diary Creation - Step 1 of 6 (Introduction) window opens and displays " Work Processing Administrator: Best Practices for Risk and Claim Management".

5. Select the Next button.

    The Auto Diary Creation - Step 2 of 6 (Creation Process) window opens.

6. Select the Auto Diary wizard option or the Best Practices wizard option to select the method you want to use to create auto diary definition(s).

7. Select the Next button.

    The appropriate wizard will open based on the option you selected on the Auto Diary Creation - Step 2 of 6 (Creation Process) window.

8. From the Which auto diary template do you wish to use? drop down list, select Policy Management Review.

9. Complete the fields and select the options on each of the windows.

10. To move to the next window, select the Next button.

11. On the last window, select the Finish button.

    RISKMASTER adds the auto diary definition to the WPA Diary Utilities window.

12. To generate the diaries, either run it manually using WPA Auto Diary Processing, or automatically through Event Scheduler.

Policy

To Convert a Quote into a Policy

To create a policy you need to first create a quote and then convert the quote into a policy. When you convert a quote to a policy, RISKMASTER copies the existing quote information to a policy. All field names on the Policy Management window automatically change to reflect the policy. After RISKMASTER converts a quote to a policy, you cannot change the Policy Name, but you can update the Policy Number.

1. From the main menu, select Policy.

    The Policy menu opens.

2. From the Policy menu, choose a policy type.

    The <Policy name> window opens and a <Policy name> link displays under Policy node in the navigation tree.

3. On the Quote tab, from the Quote Name field, select the ⋯ button.

    The Standard Policy Management Search window opens.

4. Search for the quote you want to covert to a policy.

    The quote you selected opens in the Policy Management window.

5. On the Quote tab, select the Convert to Policy button.

    RISKMASTER clones the quote information to a policy. All field names automatically change to reflect a policy, and the Policy Name field becomes disabled.

To Amend a Policy

You can process mid-term endorsements to In-Effect policies and calculate flat or pro-rata premium rates based on policy changes. You can only amend policies if you have the appropriate permissions.

1. Convert a quote to a policy.
2. On the <Policy name> window, select the Amend button.

    The Amend Policy window opens.
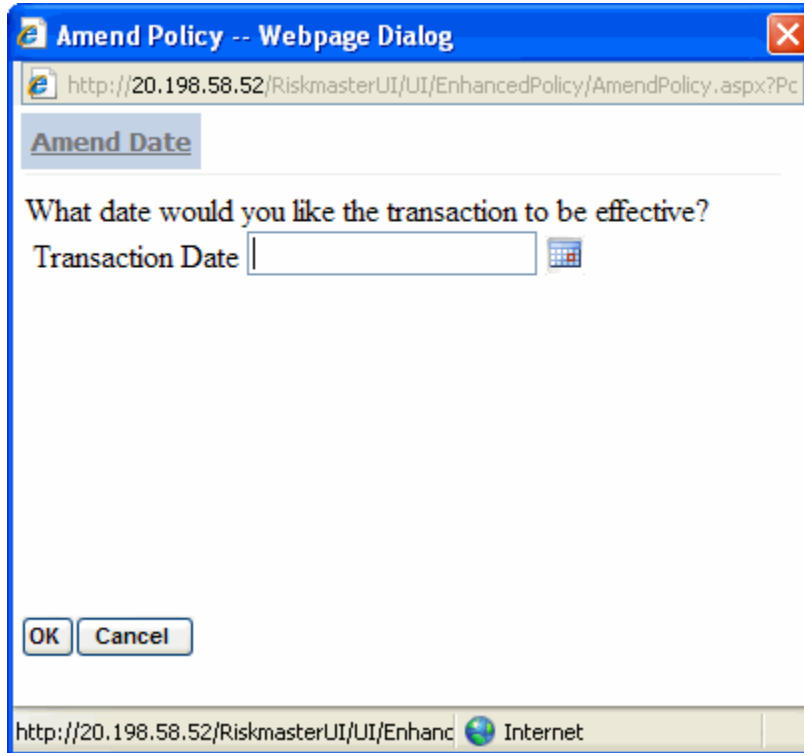
3. In the Transaction Date field, enter the date on which you want the endorsement to come into effect.

Note: The endorsement effective date must fall within the policy effective and expiration dates and after the transaction date of the most recent transaction.

4. Select OK.

    RISKMASTER assigns a Provisional Endorsement status to the policy and displays the credit for the unearned premium amount in the Transaction Premium field on the Premium Calculation tab. The unearned premium amount is deducted from the total billed premium amount for the policy.

5. On the Policy Management window, select the Transaction History tab.
6. From the Transactions list, select the Endorsement type transaction with a Provisional status.
7. Select the Accept button.

A window opens and displays a confirmation message.

8. Select OK.

    RISKMASTER changes the policy status from Provisional Endorsement to In-Effect.

Note: You can make changes to the RISKMASTER database before you accept and complete the renewal process. To complete the renewal process, select the Accept button. RISKMASTER posts the transaction premium to a billing system.

To Cancel a Policy

You can manually process pro-rata and flat cancellations to In-Effect policies. You can only cancel policies if you have the appropriate permissions. When you cancel a policy, RISKMASTER assigns a Provisional Cancel status to the policy. You cannot process new transactions on a policy with a Provisional Cancel status. You can undo a policy cancellation while it has a Provisional Cancel status.

To Cancel a Policy

1. [Convert a quote to a policy](#).
2. On the Policy Management window, select the Cancel button.

    The Cancel Policy window opens.

3. From the Cancellation Type drop down list, select the cancellation type, for example flat or pro-rata.
4. From the Cancel Reason drop down list, select the cancellation reason.
5. Select OK.

    RISKMASTER assigns a Provisional Cancel status to the policy and displays the credit for the unearned premium amount in the Transaction Premium field on the Premium Calculation tab. The unearned premium amount is deducted from the total billed premium amount for the policy.

6. On the Policy Management window, select the Transaction History tab.
7. From the Transactions list, select the Cancel type transaction with a Provisional status.
8. Select the Accept button.

    RISKMASTER changes the policy status to Cancelled-Pro-Rata or Cancelled-Flat.

Note: You can make changes to the RISKMASTER database before you accept and complete the cancellation process. To complete the cancellation process, select the Accept button. RISKMASTER posts the transaction premium to a billing system.

To Reinstate a Policy

You can manually reinstate policies with Cancelled, Cancelled-Pro-Rata, and Cancelled-Flat status if you have the appropriate permissions. When you reinstate a cancelled policy, RISKMASTER assigns a Provisional Reinstatement status to the policy. You cannot process new transactions on a policy with a Provisional Reinstatement status. You can undo a reinstatement on a policy while it has a Provisional Reinstatement status.

> Note: RISKMASTER recalculates the premium amount based on the reinstatement effective date.

1. From the main menu, select Policy.

    The Policy menu opens.

2. From the Policy menu, choose a policy type.
    The <Policy name> window opens and a <Policy name>node displays under Policy node in the navigation tree.

3. Search for the policy with a Cancel status.
4. Select the Reinstate button.
    The Reinstate Policy window opens.

5. In the Please enter the Reinstatement details frame, do one of the following:

    - Select With Lapse option, if the reinstatement effective date is after the current cancellation effective date.

    - Note: The reinstatement effective date must be within the policy effective and expiration dates for the current policy term.

    - Select Without Lapse option, if the reinstatement effective date is equal to the cancellation effective date.

6. In the Reinstatement Date field, enter the date on which you want the reinstatement to be effective.
7. Select OK.

    RISKMASTER reinstates the cancelled policy and assigns a Provisional Reinstatement with Lapse or a Provisional-Reinstatement without Lapse status to the policy. RISKMASTER also re-rates and recalculates the premium amount for the policy based on the effective reinstatement date. The new premium displays in the Transaction Premium field on the Premium Calculation tab.

> Note: RISKMASTER does not consider previously waived premium transactions for the policy term when calculating the premium amount for the reinstatement transaction.

8. On the <Policy name> window, select the Transaction History tab.
9. From the Transactions list, select the Reinstatement type transaction with a Provisional status.
10. Select the Accept button.
    RISKMASTER changes the Policy Status for the current term from Provisional Reinstatement to In-Effect.

> Note: You can make changes to the RISKMASTER database before you accept and complete the reinstatement process. To complete the reinstatement process, select the Accept button. RISKMASTER posts the transaction premium to a billing system.

To Renew a Policy

You can manually renew In-Effect policies. When you renew a policy, RISKMASTER clones the existing policy information and creates a new term record with effective and expiration dates. These dates are incremented based on the policy term length you specify in Utilities.

When you renew a policy, RISKMASTER assigns a Provisional Renew status to the policy. You cannot process new transactions on a policy with a Provisional Renew status. You can undo a policy renewal while it has a Provisional Renew status.

> Note: RISKMASTER recalculates the estimated premium based on the exposures, coverages, and discounts that are applicable at the time of policy renewal. RISKMASTER recalculates the premium regardless of the transactions that were waived in the prior policy term.

To renew a policy

1. [Convert a quote to a policy](#).

2. On the <Policy name> window, select the Renew button.

   A window opens and displays a confirmation message.

3. Select OK.

   RISKMASTER creates a renewed policy with a Provisional Renew status.

Note: The policy name for the renewed policy displays from the prior term and you cannot change the policy name. The policy number is also carried over from the prior term, but you can edit the policy number.

4. On the <Policy name> window, select the Transaction History tab.

5. From the Transactions list, select the Renewal type transaction with a Provisional status.

6. Select the Accept button.

   A window opens and displays a confirmation message.

7. Select OK.

   RISKMASTER changes the policy status for the current term from Provisional Renewal to In-Effect. RISKMASTER also updates the status of the prior term record to Renewed.

Note: You can make changes to the RISKMASTER database before you accept and complete the renewal process. To complete the renewal process, select the Accept button. RISKMASTER posts the transaction premium to a billing system.

To Disable Policy Renewal

You can set up In-Effect policies that cannot be renewed. Once you disable policy renewal, the Renew button on the Policy window is disabled. You can process endorsements, audits, and cancellations on policies even after you disable policy renewal.

Note: To enable renewal after disabling it, on the Policy Info tab, in the Non-Renew field, select None.

To disable policy renewal

1. From the main menu, select Policy.

   The Policy menu opens

2. From the Policy menu, choose a policy type.

   The <Policy name> window opens and a <Policy name> link displays under Policy node in the navigation tree.

3. Search for the policy for which you want to disable policy renewal.

4. On the Policy tab, from the Non-Renew Reason field, select the search ![search icon] button to select the reason for policy non-renewal from the Codes Selection window.

Note: If you select a reason other than None, RISKMASTER disables the Renew button on the Policy window for this policy and you cannot renew the policy.

5. From the toolbar, select the Save button ![save icon].

To Calculate Earned Premium

You can calculate the earned premium amount on a policy at any time during the current policy term and for all policy status. You cannot calculate earned premiums for quotes. The earned premium amount is not stored in the database.

To calculate the earned premium amount, RISKMASTER completes the following steps:

- Divides the total billed premium amount by the number of days in the policy term.

- Based on the To and From Date you enter, calculates the number of days in the specified period.

- Multiplies the number of days with the dollar amount per day.

To calculate earned premium

1. [Convert a quote to a policy](#).
2. On the <Policy name> window, select the Earned Premium button.
   The Earned Premium window opens.

3. The To Date field displays the current term expiration date.

4. In the From Date field, enter the date from which you want to calculate the earned premium.
5. In the To Date field, either accept the default, or enter the last date for the period for which you want to calculate the earned premium.
6. Select the Calculate button.

Note: The calculation is policy-specific. An error message displays if you enter dates that cross multiple policy terms.

To Print and Attach Policy Forms

You can print endorsement, cancellation, reinstatement, renewal, and non-renewal forms and permanently attach them to the appropriate policy record. Once you print a form, RISKMASTER permanently attaches the form to the policy. You can view the printed forms from the Attachments window in RISKMASTER.

To Print and Attach Policy Forms

1. From the main menu, select Policy.
   The Policy menu opens
2. From the Policy menu, choose a policy type.
   The <Policy name> window opens and a <Policy name>link displays under Policy node in the navigation tree.

3. Search for the policy you want to print.
4. Select the Policy Print button.
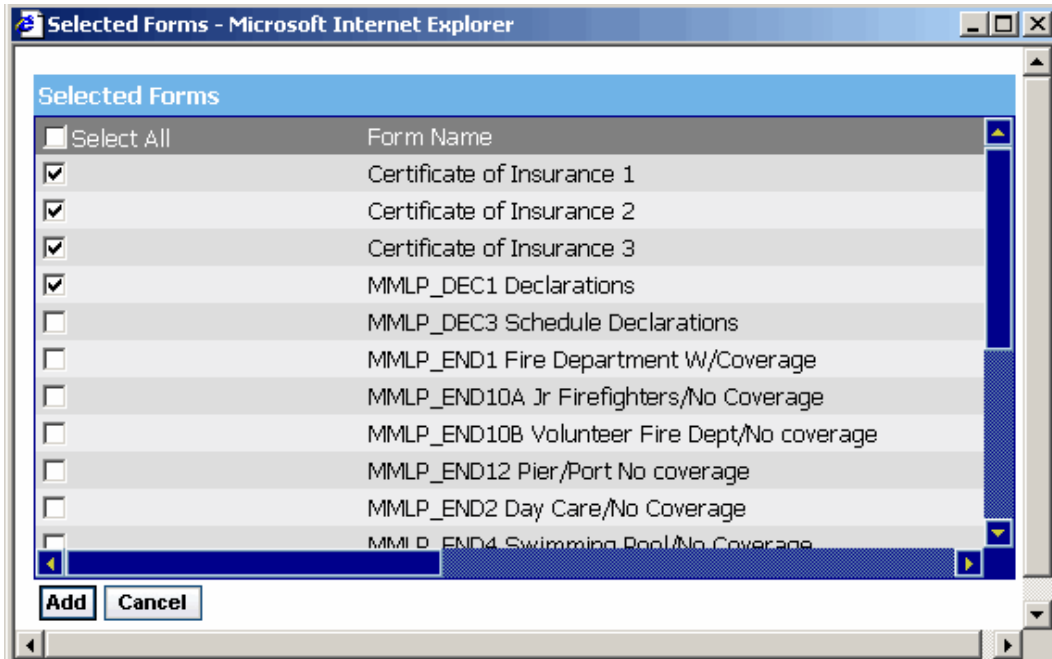
The Selected Forms window opens.

5. From the list of forms, select the form you want to print.
6. If the form you want to print is not included in the list of forms, select the Add button.

7. From the Available Forms window, select the form you want to add.

8. On the Available Forms window, select the Add button.

9. On the Selected Forms window, select the Save button.

10. Select the check box for the form/s you want to print, and select the Print Policy button.

    RISKMASTER opens the form populated with your policy data in Adobe Acrobat. You can print the form from Adobe Acrobat.

Note: After you print a form, RISKMASTER permanently attaches the form to the policy record.

To Delete a Provisional Transaction

You can delete provisional cancellation and provisional renewal transactions.

1. From the main menu, select Policy.
   The Policy menu opens

2. From the policy menu, choose a policy type.
   The <Policy name> window opens and a <Policy name> link displays under Policy node in the navigation tree.

3. Search for the policy for which you want to delete provisional transactions.

4. On the <Policy name> window, select the Trans History tab.

5. From the list of transactions, select the transaction you want to delete.

6. Select the Delete button .
   RISKMASTER deletes the selected transaction.

Premium Calculation

Premium Calculation Overview

RISKMASTER calculates premiums based on actuarial rates and discounts. The EPTS enables you:

- To account for tiered rating

- To factor-in experience modified and calculate modified premiums

- To enter and apply discounts at various levels of rating

- To capture estimated premium amounts and total billed premium amounts

- To define minimum billed premium amounts

- To calculate premiums by 365 days to accommodate short-term policies

- To calculate earned premium at policy-level

Rate, Exposures and Manual Premium

Rate is the premium charge per exposure. An exposure is a risk of financial loss, for which insurance is purchased. RISKMASTER calculates the manual premium based on the rate and exposure units you enter in RISKMASTER Utilities, effective for a given time period, in a jurisdiction.

1. In Utilities, on the Policy Management Setup: General tab, enter the policy term based on LOB and State.

Note: Policy term is the period during which an insurance policy provides coverage.

LOB	State	Term Length	Term Code
WC Claim	MS	1	Y

2. In Utilities, on the Policy Management Setup: Rate Setup tab, enter a rate for each exposure, within a jurisdiction, along with an effective time period.

Exposure Code	Exposure Description	State	Flat or Percent	Amount/Rate	Fixed or ProRata	Base Rate	Effective Date	Expiration Date
07370V	Volunteer Ambulance	MS	P	20%	P	20%	6/1/2007	6/17/2008
07380B	Drivers	MS	F	$2.86	F	1	6/1/2004	6/30/2010

3. In EPS, when you enter a quote and select an exposure, based on the Exposure type and State, the Rate and Base Rate fields display the value you entered on the Policy Management Setup: Rate Setup tab.

4. The Exposure Sum field displays the total amount of all the exposures you have entered.

5. The Manual Premium field displays the premium based on the exposure sum, policy term and rate. This amount also displays in the Manual Premium field, on the Policy Management window: Prem. Calc. tab.

Exposure Code	Exposure Description	Status	Amount	Amount/Rate	ProRata Annual Premium	Effective Date	Expiration Date
07370V	Volunteer Ambulance	Accepted	$10,000	20%	$401	6/1/2006	6/17/2008
07380B	Drivers	Accepted	$20,000	$2.86	$572	6/1/2006	6/01/2008

Exposure Sum: $120,000.00

Manual Premium: $ 973

Modified Premium based on Exp Mod Factor

In case of Workers' Compensation claim, you can manually enter an Experience Modification Factor (Exp Mod Factor). RISKMASTER multiplies the Manual Premium amount with the Exp Mod Factor to give you the Modified Premium.

Experience Modification factor is used to modify the computed premium based on an insured's payroll and loss record. The insurer determines the modification factor by comparing actual losses to expected losses, and can be a debit (>1.00) or a credit (<1.00).

1.

Manual Premium	Exp Mod Factor		Modified Premium
$ 973.00	5	5*973 =	$ 4865

Note: For General Liability claims and Vehicle Accident claims, where Exp Mod Factor, is not applicable, the Manual Premium = Modified Premium.

Manual or Modified Premium and Discounts

In RISKMASTER Utilities, you can enter and apply discounts at various levels of rating. RISKMASTER deducts the discounts from the manual or modified premium. You can enter discount tiers to deduct discounts at various levels of the premium amount. RISKMASTER displays the premium amount after deducting discounts as the Estimated Premium.

1. In Utilities, on the Policy Management Setup: Discount Maintenance tab, enter the discount applicable on a certain range of premium amount, based on LOB, State and policy effective time period.

2. You can enter a flat amount ($) or a percentage rate (%). Discounts are deducted from the premium as a flat amount or a percentage of the premium amount.

3. In Utilities, on the Policy Management Setup: Discount Setup tab, you can add tiers based on which you want to apply the discounts at various levels of the premium.

Discount_Tier_1 for LOB – WC, State – MS within Policy Effective date range; Applicable level – $120 Modified Premium

Discount_Tier_2 for LOB – WC, State – MS within Policy Effective date range; Applicable level - 2.5% Discount_Tier_1

4. Note: The Manual Premium or Modified Premium is usually the first discount tier.

5. You can also make the discount in a tier, as user editable. This allows users to manually enter the discount amount or rate in EPS.

6. In EPS, on the Policy Management window: Prem. Calc. tab., the discounts are applied against applicable levels.

7. RISKMASTER calculates the Estimated Premium after deducting each tier of discount from the premium amount at the applicable level.

Modified Premium	Discount Tier	
$ 4865	Discount_Tier_1 = $120	$ 4865 – $ 120 = $ 4745
	Discount_Tier_2 = 2.5 %	2.5% of 4745 = $ 118.62

Estimated Premium = $ 4745 - $ 118.62 = $ 4626.38** If you selected the Round Premium Amount check box on the Policy Management Setup: General tab, the Estimated Premium displays as $ 4626.

8. Note: You cannot edit the estimated premium. When you change any of the exposures, rates or discount values, RISKMASTER recalculates the estimated premium.

Expense Constant and Estimated Premium/Total Billed Premium

An expense constant is a premium charge made on small Workers' Compensation policies based upon the fact that the expense factor on

such risks is inadequate to cover the cost of issuing and handling the policy. You enter the expense constant for WC policies based on

jurisdiction, in RISKMASTER Utilities.

1. In Utilities, on the Policy Management Setup: General tab, enter an expense constant based on LOB and State.
2. In EPS, on the Policy Management window: Prem. Calc. tab., the Total Billed Premium displays the sum of the Expense Constant and the Estimated Premium.

Expense Constant	Estimated Premium	Total Billed Premium
$ 154	$ 4626	$ 154 + $ 4626 = $ 4780

Transaction Premium and Total Billed Premium

If you added any endorsements to your in-effect policy, RISKMASTER recalculates the premium based on the new transaction. The recalculated premium is the current estimated premium.

The Transaction Premium field displays the difference between the previous estimated premium and the current estimated premium.

Previous Estimated Premium	Current Estimated Premium	Total Billed Premium
$ 4626	$ 2700	$ 4626 - $2700 = $ 1926

Minimum Billed Threshold and Estimated Premium/Total Billed Premium

Minimum Billed Threshold is the minimum amount that is mandatory for the insured to pay to the insurer, in lieu of policy handling.

1. If the Estimated Premium is less than the Minimum Billed Threshold that you enter on the Policy Management Setup: General tab, then the Total Billed Premium field displays the Minimum Billed Threshold amount.

2.   If Estimated Premium is greater than the Minimum Billed Threshold, then RISKMASTER checks if an Expense Constant is applicable on the premium. If an expense constant is applicable then, Total Billed Premium is the sum of Estimated Premium and Expense Constant.

3.   If the Estimated Premium is greater than or equal to the Minimum Billed Threshold, and no expense constant is applicable, then the Total Billed Premium displays the calculated Estimated Premium, as it is.

Earned Premium

You can view the policy's calculated earned premium amount at the policy-level at any time during the current policy term, and for all policy status. You cannot calculate earned premiums for quotes. The earned premium amount is not stored in the database.

On the Policy Management window, select the Earned Premium button.

To calculate the earned premium amount, RISKMASTER completes the following steps:

1.   Divides the total billed premium amount by the number of days in the policy term.
2.   Based on the To and From Date you enter, calculates the number of days in the specified period.
3.   Multiplies the number of days with the dollar amount per day.

For example, for a one year policy term, the earned premium in a give quarter is calculated as follows:

Total Billed Premium	Number or Days in the Policy Period	Number of Days in Specified Period
$4780	365	90
Dollar Amount per day = 4780/365 = $ 13.09		Earned Premium = $ 13.09 * 90 = $ 1178

To Calculate Earned Premium

You can calculate the earned premium amount on a policy at any time during the current policy term and for all policy status. You cannot calculate earned premiums for quotes. The earned premium amount is not stored in the database.

To calculate the earned premium amount, RISKMASTER completes the following steps:

▪   Divides the total billed premium amount by the number of days in the policy term.

▪   Based on the To and From Date you enter, calculates the number of days in the specified period.

▪   Multiplies the number of days with the dollar amount per day.

To calculate earned premium

1.   Convert a quote to a policy.
2.   On the <Policy name> window, select the Earned Premium button.
      The Earned Premium window opens.

3.   The To Date field displays the current term expiration date.

4.   In the From Date field, enter the date from which you want to calculate the earned premium.
5.   In the To Date field, either accept the default, or enter the last date for the period for which you want to calculate the earned premium.
6.   Select the Calculate button.

Note: The calculation is policy-specific. An error message displays if you enter dates that cross multiple policy terms.

Policy Billing

Billing Overview

Policy Billing is an add-on module you can purchase and activate along with Policy Management System. The Policy Billing module allows you to view and modify accounting data for a specific policy. You can view generated as well as scheduled installments, add receipts, adjustments, add and print reimbursements and reconcile billing items.

The Policy Billing module:

- Enables setting up of installment billing

- Generates billing invoices

- Posts policy payments and credits

- Automates cancellation of In-Effect non-paid policies based on established billing rules

- Accommodates pro-rata and flat cancellation types

- Creates a diary notification when a policy is cancelled for non-payment

- Creates a diary notification when a policy is attached to a claim

- Enables you to manually override system-generated cancellation and restart billing process

- Captures billed policy premium amounts and billing credits based on policy type

- Applies discounts and/or dividend payments based on policy type

- Calculates minimum installment billing amounts based on pre-defined pay plan rules and produce billing invoices

- Accommodates multiple billings or audit, at any given time

- Generates refunds if a policy with no claims attached is flat cancelled and payment is received

- Generates billing and audit invoices and permanently attaches invoices to the policy billing record

Billing Items Reconciliation Overview

You can create a reconciliation batch for selected billing items and mark all the billing items with the batch number. You can reconcile billing items on the Billing window: Account History tab and the Batches window.

You can select only accepted billing items with OK status, for reconciliation, and you need to reconcile a minimum of two items. The selected billing items display a status of SR (Selected for Reconciliation). After you reconcile the selected billing items, the SR status changes to RC (Reconciled). The updated status displays on the Billing window: Account History tab. After reconciliation, RISKMASTER closes the batch and you cannot cancel any Premium Items in the batch.

The three reconciliation types and associated processing are, as shown below.

- Reconcile Exact

- Reconcile with Balance

- Reconcile with Write Off

After you select a reconciliation type, you can also cancel the pay plan, if the billing item meets specific criteria.

Reconcile Exact

You can select to reconcile as Exact, if the batch total is zero. If the batch total is not zero and you select to reconcile as exact, then RISKMASTER displays an error. If the batch total is zero, RISKMASTER updates the batch and the status of the Billing Items.

Reconcile with Balance

You can select to reconcile with Balance if the batch total is less than or greater than zero. If you select to reconcile with Balance, when the batch total is zero, then RISKMASTER automatically adjusts the batch type as Exact, and continues further processing.

Reconciling with Balance allows RISKMASTER to create:

- A Balance Item Adjustment for the difference in the batch total, to make the batch total zero

- An Overpayment Adjustment for the difference in the batch total, to create a credit payment for the policyholder

- An Underpayment Adjustment for the difference in the batch total, to bill an extra charge to the policyholder

For Example:

Before reconciliation

Type

Premium Item

Receipt

After reconciling with balance

Premium Item

Receipt

Balance Item type adjustment (Balance Total = Zero)

Reconcile with Write Off

You can select to reconcile with Write Off if the batch total is less than or greater than zero. If you select to reconcile with Balance, when the batch total is zero, then RISKMASTER automatically adjusts the batch type as Exact, and continues further processing.

Reconciling with Write Off allows RISKMASTER to create a Balance Item Adjustment for the difference in the batch total, to make the batch total zero.

CSC recommends that you reconcile with Write Off if the batch total is close to zero and you neither want to create a overpayment credit or an underpayment bill for the policyholder.

For Example:

Before reconciliation

Type

Premium Item

Receipt

After reconciling with balance

Premium Item

Receipt

Balance Item type adjustment

Underpayment type adjustment (Amount still owed)

Cancel the Pay Plan

You can cancel a pay plan during reconciliation, if your billing item meets each of the following criteria.

1. A policy has an associated pay plan for which RISKMASTER has generated the first installment invoice.
2. You want to reconcile the Premium Item of that installment with a credit item, such as Receipts and/or Adjustments.
3. The total amount of the reconciliation equals the total premium amount due for the entire policy term.

When the above criteria are met, and you select the reconciliation type, RISKMASTER displays a message whether you want to cancel the pay plan. If you select Yes to cancel the pay plan, then RISKMASTER:

1. Automatically cancels the Pay Plan, and deletes the first Installment Premium Item, all Installment records and related diaries.
2. Removes the Pay Plan code from the Account record for the term.
3. Creates a Full Bill Premium Item for the total premium amount due for the entire policy term.
4. Reconciles the Full Bill Premium Item with the credit items.

For Example:

$100,000 total premium amount for the term

Policy on Pay Plan with 4 equal installments

Before Reconciliation

Type

Premium Item

Receipt

Adjustment

After Reconciliation - Select to cancel the pay plan

Premium Item

Receipt

Adjustment

Policy Management and Billing Work Flow

You can use the Policy Billing module along with EPTS to post, track and change premium, create payment plans, and schedule and print invoices and notices for Workers Compensation and General Liability policies.

After you activate policy billing in Utilities, to create a quote, or convert a quote to policy in EPTS, you have to complete the Billing Rule Code and Bill To Type field on the Policy Management window: Billing tab.

Based on whether you select a pay plan for bill payment, or not, the Policy Billing module and EPTS, interact with each other, as shown below.

With a Pay Plan

- When you convert a quote to policy, or renew a policy, RISKMASTER sets up installments for the total billed premium based on the pay plan you selected.

- RISKMASTER calculates the total billed premium based on the rates you enter in Utilities. The calculated amount displays in the Total Billed Premium field on the Policy Management window: Quote tab.

- RISKMASTER sets up the installment based on the dollar or percentage amount of the current installment number. You enter the installment number on the Installments (number) field on the Add/Modify Pay Plan window in Utilities.

- The pay plan start date is based on the date of first installment. On the Add/Modify Pay Plan window, in the Offset From field, you have to select the code that describes, whether you want to offset the pay plan start date from the date on which the policy term comes into effect, or the date on which you convert the quote to policy.

- RISKMASTER determines the Installment Date and Installment Due Dates based on the Installment Generation Type that you select on the Add/Modify Pay Plan window.

- If the pay plan started later than the determined initial installment due date, to adjust the installment schedule, RISKMASTER uses the Late Start Indicator, such as "B" for Bill Immediately or "N" for Bill in Next Installment, or "S" for Spread over remaining Installments on the Add/Modify Pay Plan window.

- When you amend or endorse a policy, RISKMASTER adjusts the installment amount or immediately bills the additional amount. To adjust the amount, RISKMASTER can add it to the next installment, or spread it over remaining installments.

- When you cancel a policy, RISKMASTER immediately bills any additional/return premium based on the difference between the Total Billed Amount and the already billed amount.

- RISKMASTER also deletes all pending scheduled diary notifications for cancelled policies.

- When you reinstate a policy, RISKMASTER reinstates the pay plan and reschedules the remaining premium installments. The remaining premium amount is equally distributed over the due installments.

- RISKMASTER creates a Print Invoice diary notification for the policy.

Without a Pay Plan

- When you convert a quote to policy, renew, amend or reinstate a policy, without a pay plan, RISKMASTER calculates the premium based on the policy term and current transaction type.

- RISKMASTER determines the premium Due Date, based on the Due Date of the Billing Rule that you enter on the Add/Modify Billing Rule window. RISKMASTER adds the due days in the Billing Rule, to the current system date to calculate the premium due date.

- RISKMASTER immediately bills the calculated additional/return premium, and creates a Print Invoice diary notification for the policy.

- RISKMASTER creates diary notification for policy conversion, amendment, renewal, cancellation, or reinstatement.

| Tips |

To Activate Policy Billing

You can purchase the Policy Billing add-on module with your Policy Management System.

> Note: After you activate the policy billing system, to create a quote, or convert a quote to policy in Policy Management System, you have to complete the Billing Rule Code and Bill To Type field on the Policy Management window: Billing tab.

1. From the main menu, select Utilities.

    The Utilities menu opens.

2. From the Utilities menu, choose System Parameters.

3. From the System Parameters menu, choose General System Parameter Setup.

    The General System Parameter Setup window opens and a General System Parameter Setup link displays under Utilities node in the navigation tree.

4. On the System Settings tab, in the General Parameters frame, select the Use Policy Management System check box.

    An Activation Code Required window opens.

5. Enter the RISKMASTER Policy Management System Activation Code for your organization.

Note: Contact CSC Support for your activation code. CSC provides you with the activation code when you purchase the Policy Management System module.

6. Select OK.

7. On the System Settings tab, the Use Billing System check box displays as active.

8. Select the Use Billing System check box.

9. From the toolbar, select .

10. Close the System Setup Parameters window.

Note: You need to log out and then log in again to view the Policy Billing link , in the Maintenance navigation tree.

Tips

To Add an Adjustment

1. From the main menu, select Maintenance.

    The Maintenance menu opens.

2. From the Maintenance menu, choose Policy Billing link.

    The Policy Billing window opens and a Policy Billing link displays under the Maintenance node in the navigation tree.

3. On the Accounting History tab, do one of the following:

    - Select the Add Adjustment button.

    - From the Filter Options frame, select the button, to open the Billing Type window and select the Receipt link.

    The Adjustment window opens.

4. Complete the fields on the Adjustment window , as shown below .

    Billing Item Details tab

Policy Name	Displays the policy name.
Policy Number	Displays the policy number.
Date Entered	Displays the date on which you add the receipt.
Term Number	Displays the term number.

Adjustment Details tab

Adjustment Type	From the drop down list, select the adjustment type.
Amount	Enter the adjustment amount.
Invoice Number	Enter the invoice number for the receipt.
Notice Number	Enter the notice number.
Comments	Select the [icon] button to open the RISKMASTER Editor and enter additional comments.

Reconciliation Details tab

Status	Displays the reconciliation status.
Date Reconciled	Displays the date on which receipt was reconciled.
Final Batch No	Displays the final batch number for the reconciliation.
Final Batch Type	Displays the final batch type for the reconciliation.
Entry Batch Type	Displays the entry batch type for the reconciliation.
Entry Batch No	Displays the entry batch number.

5. Select OK.

   RISKMASTER adds the adjustment and displays it on the Accounting History tab.

Tips

To Add a Receipt

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Policy Billing link.

   The Policy Billing window opens and a Policy Billing link displays under the Maintenance node in the navigation tree.

3. On the Accounting History tab, do one of the following:

   - Select the Add Receipt button.

   - From the Filter Options frame, select the [icon] button, to open the Billing Type window and select the Receipt link.

   The Receipt window opens.

4. Complete the fields on the Receipt window , as shown below .

Billing Item Details tab

Policy Name	Displays the policy name.
Policy Number	Displays the policy number.
Date Entered	Displays the date on which you add the receipt.
Term Number	Displays the term number.

Receipt Details tab

Payment Method	From the drop down list, select the payment method, such as cash or cheque.
Amount	Enter the receipt amount.
Check Number	Enter the check number for the receipt.
Date Received	Enter the date on which check is received or select the date from the calendar.
Check Date	Enter the date on which check is issued or select the date from the calendar.
Invoice Number	Enter the invoice number for the receipt.
Notice Number	Enter the notice number.
Comments	Select the button to open the RISKMASTER Editor and enter additional comments.

Reconciliation Details tab

Status	Displays the reconciliation status.
Date Reconciled	Displays the date on which receipt was reconciled.
Final Batch No	Displays the final batch number for the reconciliation.
Final Batch Type	Displays the final batch type for the reconciliation.
Entry Batch Type	Displays the entry batch type for the reconciliation.

> **Entry Batch No**   Displays the entry batch number.

5. Select OK.

    RISKMASTER adds the receipt and displays it on the Account History tab.

To Reconcile Billing Items

You can create a reconciliation batch for selected billing items and mark all the billing items with the batch number. The selected billing items display a status of SR (Selected for Reconciliation). After you reconcile the selected billing items, the SR status changes to RC (Reconciled). After reconciliation, RISKMASTER closes the batch and you cannot cancel any Premium Items in the batch.

1. From the main menu, select Maintenance.

    The Maintenance menu opens.

2. From the Maintenance menu, choose Policy Billing link.

    The Policy Billing window opens and a Policy Billing link displays under the Maintenance node in the navigation tree.

3. To view the billing items you want to reconcile , in the Filter Options frame, complete the fields, as shown below.

4. Select the check box for the billing items you want to reconcile, and then select the Select For Reconciliation button.

    RISKMASTER selects the items for reconciliation and displays their status as SR on the Accounting History tab.

	Date Entered	Billing Item Type	Receipt Type	Status	Amount	Due Date	Date Reconciled	Final batch Number	Final Batch Type	Entry Batch Number	Entry Batch Type	Invoice Number
☐	8/30/2010	Premium Item		SR	$458.63	9/1/2010		38	Reconciliation	0		0
☐	8/30/2010	Tax		SR	$114.66	9/1/2010		38	Reconciliation	0		0

Policy Balance $698.29   Term Balance $573.29

[Add Receipt] [Add Adjustment] [Add Disbursement] [Select For Reconciliation] [Unselect For Reconciliation] [Reconcile] [Print Disbursement]

5. Select the Reconcile button.

    The Reconciliation Details window opens.
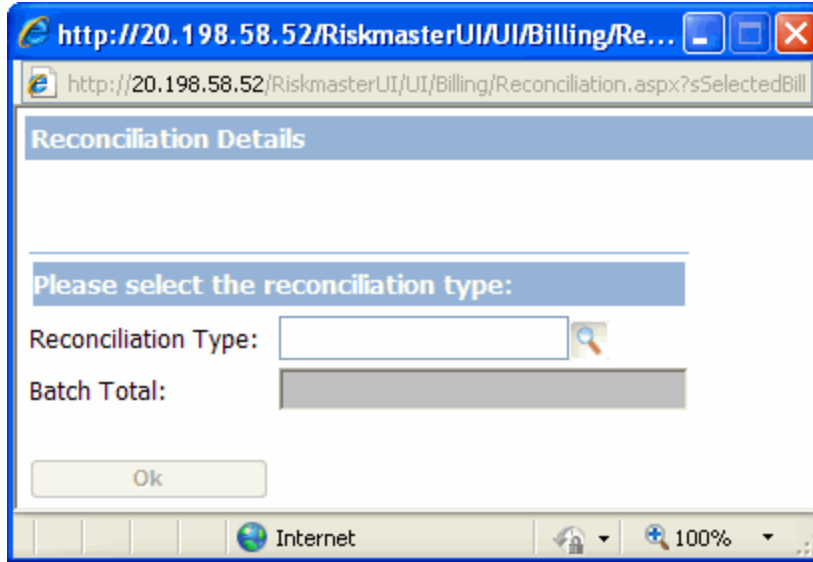
6. From the Reconciliation type field, select the button to select the reconciliation type from the Codes Selection window.

Note: You can select to reconcile the batch as Exact, Balance or Write Off.

7. Select OK.

    RISKMASTER reconciles the billing items and displays their status as RC on the Accounting History tab.

	Date Entered	Billing Item Type	Receipt Type	Status	Amount	Due Date	Date Reconciled	Final batch Number	Final Batch Type	Entry Batch Number	Entry Batch Type	Invoice Number	
☐	9/17/2010	Adjustment		OK	$573.29			0		38	Reconciliation	0	

Policy Balance	$698.29		Term Balance	$573.29

Add Receipt | Add Adjustment | Add Disbursement | Select For Reconciliation | Unselect For Reconciliation | Reconcile | Print Disbursement

To Add a Disbursement

1. From the main menu, select Maintenance.

    The Maintenance menu opens.

2. From the Maintenance menu, choose Policy Billing link.
    The Policy Billing window opens and a Policy Billing link displays under the Maintenance node in the navigation tree.

3. On the Accounting History tab, do one of the following:
    *   Select the Add Disbursement button.

- From the Filter Options frame, select the [ ] button, to open the Billing Type window and select the Disbursement link.

The Disbursement window opens.

4. Complete the fields on the Disbursement window , as shown below .

   Billing Item Details tab

Policy Name	Displays the policy name.
Policy Number	Displays the policy number.
Date Entered	Displays the date on which you add the receipt.
Term Number	Displays the term number.

   Disbursement Details tab

Payment Method	From the drop down list, select the payment method.
Amount	Enter the disbursement amount.
Bank Account	From the drop down list, select the bank account from which you want to make the disbursement.
Transaction Type	From the drop down list, select the transaction type.
Printed?	The check box displays as selected if the check is printed.
Date	Enter the date on which you want to issue the disbursement check.
Check Number	Enter the check number for disbursement.
Payee	Displays the payee name.
Invoice Number	Enter the invoice number for the receipt.
Notice Number	Enter the notice number.
Comments	Select the [ ] button to open the RISKMASTER Editor and enter additional comments.

   Reconciliation Details tab

Status	Displays the reconciliation status.
Date Reconciled	Displays the date on which receipt was reconciled.
Final Batch No	Displays the final batch number for the reconciliation.
Final Batch Type	Displays the final batch type for the reconciliation.
Entry Batch Type	Displays the entry batch type for the reconciliation.
Entry Batch No	Displays the entry batch number.

5. Select OK.

   RISKMASTER adds the disbursement and displays it on the Account History tab.

Note: You can print a disbursement, only after reconciliation.

Batch

To Reverse a Batch

You can reverse a closed batch. You may need to reverse a closed batch, if you incorrectly reconciled some items together or a reconciled check from the customer did not clear the bank. When you reverse a batch:

1. All Billing Items that you selected to reconcile together display an accepted (OK) status.
2. The Billing Items do not display the Billing Item.
3. RISKMASTER deletes any Adjustments (Balance Item, Underpayment, Overpayment or Write Off) created during reconciliation.
4. The Batch status on the Batches window displays as Reversed.

To reverse a batch

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Batches.

   The Batches window opens and a Batches link displays under the Maintenance node in the navigation tree.

3. From the Batch Type drop down list, select the batch type you want to display.
4. From the Batch Status drop down list, select the batch status you want to display.
5. In the Date From and Date To fields, enter the date range for the batch you want to display.
6. From the User Id drop down list, select the user ID if you want to display the batches opened by a user.

   The Batches table displays the batches based on the filters you select.

7. From the Batches table, select the option for a closed batch, you want to reverse.
8. Select the Reverse Batch button.

   RISKMASTER reverses the selected batch, that is the Billing Items are no longer associated with the batch.

To Abort a Batch

You can abort an open batch to remove all Billing Items in the batch and close the batch. The Billing Items in the aborted batch display the accepted status and the batch is deleted from RISKMASTER.

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Batches.

   The Batches window opens and Batches link displays under the Maintenance node in the navigation tree.

3. From the Batch Type drop down list, select the batch type you want to display.

4. From the Batch Status drop down list, select the batch status you want to display.

5. In the Date From and Date To fields, enter the date range for the batch you want to display.

6. From the User Id drop down list, select the user ID if you want to display the batches opened by a user.

   The Batches table displays the batches based on the filters you select.

7. From the Batches table, select the option for an open batch.

Note: You cannot abort closed or reversed batches.

The Associated Billed Items table displays the billed items associated with the batch you select.

8. Select the Abort Batch button.

   RISKMASTER aborts the batch.

To Close a Batch

1. From the main menu, select Maintenance.

   The Maintenance menu opens.

2. From the Maintenance menu, choose Batches.

   The Batches window opens and Batches link displays under the Maintenance node in the navigation tree.

3. From the Batch Type drop down list, select the batch type you want to display.

4. From the Batch Status drop down list, select the batch status you want to display.

5.   In the Date From and Date To fields, enter the date range for the batch you want to display.

6.   From the User Id drop down list, select the user ID if you want to display the batches opened by a user.

The Batches table displays the batches based on the filters you select.

7.   From the Batches table, select the option for an open batch.

The Associated Billed Items table displays the billed items associated with the batch you select.

Note: You cannot close a batch with only one billing item.

8.   Select the Close Batch button.

The Reconciliation Details window opens.

9.   From the Reconciliation type field, select the [search icon] button to select the reconciliation type from the Codes Selection window.

10. Select OK.

RISKMASTER closes the selected batch and display its status as Closed on the Batches window.

PSO Reporting

PSO Reporting Overview

The Patient Safety Organization Privacy Protection Center (PPC) was created by The Agency for Healthcare Research and Quality (AHRQ) to support the implementation of the Patient Safety and Quality Improvement Act PL-109-41 (Patient Safety Act) passed by the United States Congress in July 2005. The Patient Safety Act extends legal privilege and confidentiality protections to health care providers who voluntarily submit patient safety event information to Patient Safety Organizations (PSOs). The PSOs will assist health care providers in developing and implementing patient safety improvement strategies. The Patient Safety Act also authorizes the creation of a Network of Patient Safety Databases (NPSD). The NPSD will receive non-identifiable information regarding patient safety events and perform analysis on the aggregated data. The goal is to create a learning system for quality improvement strategies for PSOs and health care providers.

With this feature you can capture and process additional data required for reporting to the Patient Safety Organizations. Once you have recorded data you can generate report files in XML format using Data Analytics and submit the report to the PSO. On the General System Parameter Setup window, Use the "Use PSO Reporting System' check box to activate PSO reporting utility. Once the utility is turned on, on the Event window, PSO button displays in the toolbar. Use the button to open the Patient Safety Event Report window and enter patient safety data

To Setup PSO Reporting Parameters

1.   Search and open the event record for which you want to setup PSO reporting.

2.   On the Event window, from the toolbar select the [P icon] button.

The Patient Safety Event Report window opens.

3.   Select the required parameters on the window to open suitable form section and enter the details for the patient safety event for reporting.

Patient Safety Event Reporting Form window: Patient Information section

Patient Safety Event Reporting Form window: Health Care Reporting Form section

Patient Safety Event Reporting: SIR section

Patient Safety Event Reporting: Medication Or Other Substance section

Patient Safety Event reporting: Device Or Medical/Surgical Supply section

Patient Safety Event Reporting Form: Surgery or Anaesthesia

Patient Safety Event Reporting Form window: Blood or Blood Product section

What type of blood product was involved in the event?

Enter or select the button to select from the Code Selection window the code that best describes the blood product associated with event being reported.

If Other, Please Specify

What was the International Society of Blood Transfusion (ISBT) 8 digit product code for the product associated with this event?

Enter or select the button to select from the Code Selection window the code for the blood product

Which of the following best describes the event? *

Enter or select the button to select from the Code Selection window the code that best described the event being reported..

Which of the following best describes the event?

Enter or select the button to select from the Code Selection window the code that best described the event being reported.

What incorrect action was involved in administering the blood or blood product?

If Other, Please Specify

Enter or select the button to select from the Code Selection window the code that best described the incorrect or wrong action associated with handling the blood or blood product.

Was a two-person, three-way check documented?

Enter yes or no

What was the volume?

Enter the volume of blood.

What was the rate of administration?

Enter the rate of administration.

During which process was the event discovered (regardless of the stage when it originated)?

Enter the process or stage of procedure when the event was found out.

If Other, Please Specify

During which process did the event originate (regardless of the stage when it was discovered)?

Enter the process or stage of procedure when the event was started.

If Other, Please Specify

Patient Safety Event Reporting Form window: Fall section

Was the fall unassisted or assisted?

Select the [button] button to select the code to specify whether the person's fall assisted or did not assist from the Code Selection window.

Was the fall observed? *

Select the [button] button to select the code from the Code Selection window to specify whether someone observed the fall or not.

Who observed the fall?

Enter the name of the person who witnessed the fall.

Did the patient sustain a physical injury as a result of the fall? *

Select the [button] button to select the code from the Code Selection window whether the person had an injury or not after the fall .

What type of injury was sustained?

If Other, Please Specify

Enter the type of injury or select the [button] button to select the code from the Code Selection window.

Prior to the fall, what was the patient doing or trying to do? *

Enter what was the patient trying to do or doing prior to injury.

If Other, Please Specify

Prior to the fall, was a fall risk assessment performed? *

Select the [button] button to select the code from the Code Selection window whether the reason or risk of fall prior assessed before the event occurred. .

Was the patient determined to be at risk for a fall?

Select the [button] button to select the code from the Code Selection window that specifies whether the risk of fall was assessed prior evident.

What protocols/interventions were in place, or being used, to prevent falls for this patient?

If Other, Please Specify

Enter the precautionary measures/ protocol to prevent falls that were in place or select

the [button] button to select the code whether from the Code Selection window.

At time of the fall, was the patient on medication known to increase the risk for a fall? *

Select the [button] button to select the code from the Code Selection window whether the patient was on any medication that increased the risk.

Was the medication considered to have contributed to the fall?

Select the [button] button to select the code from the Code Selection window whether the medication attributed to the fall

Patient Safety Event Reporting Form window: Healthcare-Associated Infection section

Healthcare-Associated Infection

Was the infection determined to be present or incubating on admission?

Select the button to select the code from the Code Selection window whether an infection was found at time of admission in hospital.

Which of the following best describes the infection?

Select the button to select the code that best describes the infection occurred from the Code Selection window.

Was the person who determined the infection to be a healthcare-associated infection (HAI) a healthcare professional with specific training in infectious disease and/or infection control?

Select the button to select the code from the Code Selection window whether the person determining infection was trained or not.

What type of HAI is being reported? *

Select the button to select the code that best describes the infection reported/

Was it central line-associated (CLABSI)? *

Enter Yes/ No or select the button to select the code from the Code Selection window.

Which type of central line?

Enter the type of central line or select the button to select the code from the Code Selection window.

Was it a ventilator-associated pneumonia (VAP - i.e., the patient had a device to assist or control respiration continuously through a tracheostomy or by endotracheal intubation)? *

Enter Yes/ No or select the button to select the code from the Code Selection window

The VAP was classified as which of the following?

Enter the category for the pneumonia or select the button to select the code from the Code Selection window

Was it catheter-associated (CAUTI)? *

Enter Yes/ No or select the button to select the code from the Code Selection window

What was the urinary catheter status at the time of specimen collection that was the basis for diagnosis of CAUTI?

Enter Yes/ No or select the button to select the code from the Code Selection window

The CAUTI was classified as which of the following?

Enter the appropriate category or select the button to select the code from the Code Selection window

The SSI was classified as which of the following?

Enter the appropriate category or select the button to select the code from the Code Selection window

Which other type of infection?

If Other, Please Specify

Enter the type of infection or select the [🔍] button to select the code from the Code Selection window

At which inpatient location was the patient assigned when the specimen that met the infection criteria was collected, or when the first clinical evidence of CLABSI, VAP, or CAUTI appeared? If the infection developed within 48 hours of transfer from one location to one or more other locations within this facility, select the patient's first such inpatient location within the 48 hour period where the central line, urinary catheter, or ventilator was used.

Enter the appropriate location or select the [🔍] button to select the code from the Code Selection window

Patient Safety Event Reporting: Perinatal Section

Perinatal

Which of the following did the event involve?

Enter the reason or incident due to which the perinatal event occurred or select the [🔍] button to select the code from the Code Selection window

Who was affected by the event?

Enter whether mother, fetus, neonate were affected by the event or select the [🔍] button to select the code from the Code Selection window.

Was the mother a primipara?

Select Yes/ No or select the [🔍] button to select the code from the Code Selection window.

How many fetuses were in this pregnancy?

Enter the number of fetuses at the time of the pregnancy.

Immediately prior to delivery, or at the time of the intrauterine procedure (prenatal), what was the best estimate of completed weeks of gestation?

Enter the time period or select the [🔍] button to select the duration from the Code Selection window.

What was the date of delivery?

Enter the date of delivery or select from the calendar.

Was labor induced or augmented? *

Which one?

Enter the mode of labor pains.

What was the final mode of delivery?

Enter how delivery was done or select the [🔍] button to select the code from the Code Selection window.

Number of live births

Enter the number of alive children at birth..

What was the neonate's birthweight?

Enter the weight of the new born.

Which adverse outcome(s) did the mother sustain?   *

If Other, Please Specify

Enter or select the [🔍] button to select the code from the Code Selection window, the side effects or problems to mother post delivery.

Which of the following maternal infections?   *

If Other, Please Specify

Enter or select the [🔍] button to select the code from the Code Selection window, the infection the mother has.

Which body part(s) or organ(s)?   *

If Other, Please Specify

Enter or select the [🔍] button to select the code from the Code Selection window, the body parts where infection exists.

What adverse outcome did the fetus sustain?

Enter or select the [🔍] button to select the code from the Code Selection window, the adverse effects on the fetus.

Regardless of the final mode of delivery, was instrumentation used to assist vaginal (or attempted vaginal) delivery?

Select whether instruments were used for delivery.

What instrumentation was used?

Enter or select the [🔍] button to select the code from the Code Selection window, the kind of instrumentation used for delivery.

What was the 5-minute Apgar score?

Enter the score of neonate health after birth.

Which adverse outcome(s) did the neonate sustain?   *

If Other, Please Specify

Enter or select the [🔍] button to select the code from the Code Selection window, the adverse effects on the noenate.

Which birth trauma?

If Other, Please Specify

Enter or select the [🔍] button to select the code from the Code Selection window, the trauma or incident at time of birth.

Patient Safety Event Reporting Form: Neonatal Patient Information

Patient Information

Patient's Name

Enter the name of the patient for whom safety event is being reported.

Patient's Date of Birth

Enter the patient's birth date.

Medical Record #

Enter the unique number identifying patient's medical record.

Patient's Gender

Enter the gender of patient

At the time of the event what was the patient's age?   *

Enter the code that best describes the patient's age group or select the [🔍] button to select from the Code Selection window.

Is the patient's ethnicity Hispanic or Latino?	Select the [button] button to select the code best describing whether the patient's ethnicity is Hispanic or Latino or not.
What is the patient's race?	Enter the patient's race or select the [button] button to select from the Code Selection window.
Enter the patient's ICD-9-CM principal diagnosis code at discharge (if available)	Enter the ICD-9 code or select the [button] button to select from the Code Selection window. .
After discovery of the incident, what was the extent of harm to the patient (i.e., extent to which the patient's functional ability is expected to be impaired subsequent to the incident and any attempts to minimize adverse consequences)?	Enter the amount of damage to the patient after incident or select the [button] button to select from the Code Selection window.
Approximately when after discovery of the incident was harm assessed?	Select the [button] button to select the code that best describes the duration after which damage to patient was checked from the Code Selection window.
Was any intervention attempted in order to 'rescue' the patient (i.e., to prevent, to minimize, or to reverse harm)? *	Enter Yes/ No or Select the [button] button to select from the Code Selection window.
Which of the following interventions (rescue) were performed?	Enter the methods of rescue used after the event or select the [button] button to select from the Code Selection window.
f Other, Please Specify	If Others, select the Ellipses button and specify the details in the RISKMASTER editor..
Did, or will, the incident result in an increased length of stay?	Enter Yes/ No or Select the [button] button to select from the Code Selection window.
After the discovery of the incident, was the patient, patient's family, or guardian notified?	Enter Yes/ No or Select the [button] button to select from the Code Selection window.

Patient Safety Event Reporting Form: Pressure Ulcer

What was the most advanced stage of the pressure ulcer or suspected Deep Tissue Injury being reported?	Enter the code that best describes the stage of ulcer or select the button to select from the Code Selection window

What was the status of the suspected Deep Tissue Injury on admission?	Enter the code best describing the status of the injury or select the [🔍] button to select from the Code Selection window.
What was the status of the Stage 3, 4, or unstageable pressure ulcer on admission?	Enter the code best describing the status of the ulcer/ injury at the time of admission or select the [🔍] button to select from the Code Selection window.
On admission to this facility, was a skin inspection documented	Enter Yes/ No whether the skin inspection was recorded or select the [🔍] button to select the appropriate code from the Code Selection window.
When was the first pressure ulcer risk assessment performed?	Enter the date or time when the assessment was done.
What type of risk assessment was performed?	Enter the code best describing the type of risk assessment or select the [🔍] button to select from the Code Selection window.
As a result of the assessment, was the patient documented to be at increased risk for pressure ulcer?	Enter the code best describing the patient's age group or select the [🔍] button to select from the Code Selection window.
Was any preventive intervention implemented?	Enter Yes/ No or Select the [🔍] button to select from the Code Selection window.
What intervention(s) was used? **If Other, Please Specify**	Enter the code best describing the interventions used or select the [🔍] button to select from the Code Selection window.
Was the use of a device or appliance involved in the development or advancement of the pressure ulcer?	Enter Yes/ No or Select the [🔍] button to select from the Code Selection window.
What was the type of device or appliance? * **If Other, Please Specify** **What was the type of tube?** **If Other, Please Specify**	Enter the code best describing the device used for intervention or rescue or select the [🔍] button to select from the Code Selection window.
What was the type of tube? **If Other, Please Specify**	Enter the code best describing the type of tube used for intervention or rescue or select the [🔍] button to select from the Code Selection window.
Was the secondary morbidity attributed to the presence of the pressure ulcer or suspected Deep Tissue Injury?	Enter Yes/ No or Select the [🔍] button to select from the Code Selection window.

Patient Safety Event Reporting Form: Surgery or Anaesthesia

Surgery Or Anesthesia

Describe briefly the procedure associated with this event

Enter the description for the medical procedure due to which the event occurred.

Enter ICD-9-CM procedure code associated with this event

Enter the ICD 9 code or select the [button] button to select from the Code Selection window.

What was the patient's documented American Society of Anesthesiologists (ASA) Physical Classification System class?

Enter the class or select the [button] button to select from the Code Selection window.

Was the procedure performed as an emergency?

Enter Yes/ No, or select the [button] button to select from the Code Selection window, whether surgery was performed as an emergency or not.

When was the event discovered?

Enter the date when the vent was found out.

What was the total length of the procedure (i.e., induction of anesthesia to the

end of anesthesia)?

Enter or select the [button] button to select the code from the Code Selection window that best describes the length of time taken to perform the procedure.

What type of anesthesia or sedation was used?

Enter or select the [button] button to select from the Code Selection window, the code that best describes the type of anesthesia or sedation used during the procedure

What was the level of sedation?

Enter or select the [button] button to select from the Code Selection window,the code that best describes the level of sedation used in the procedure.

Who administered (or, if the event occurred prior to administration of anesthesia, person who was scheduled to administer) the anesthesia?

Enter the name of the person who supervised the procedure.

Was there supervision by an anesthesiologist?

Enter Yes/ No, or select the [button] button to select from the Code Selection window, whether an anesthesiologist supervised the procedure or not.

What was the medical or surgical specialty of the provider who performed the procedure?

If Other, Please Specify

Enter or select the [button] button to select from the Code Selection window,the code that best describes the level of sedation used in the procedure.

What best describes the event?

Enter or select the [button] button to select from the Code Selection window,the code that best describes the event reported.

Which of the following major complications occurred?

Enter or select the button to select from the Code Selection window,the codes that best describe the complications that occurred during the event.

Which of the following best describes the respiratory support provided?

If Other, Please Specify

Enter or select the button to select from the Code Selection window,the codes that best describe the respiratory support system provided to the patient.

Was the surgical event an unintentionally retained object?

Enter Yes/ No, or select the button to select from the Code Selection window, whether the event unintentionally retained object or not.

What type of object was retained?

If Other, Please Specify

Enter or select the button to select from the Code Selection window,the code that best describes the object retained.

Was a count performed for the type of object that was retained?

Enter Yes/ No, or select the button to select from the Code Selection window, whether the counting was done for the type of object that was retained.

After counting, what was the reported count status?

Enter the count status after the counting was done for the type of object that was retained

Was an x-ray obtained before the end of the procedure to detect the retained object?

Enter Yes/ No, or select the button to select from the Code Selection window, , whether an X-ray was taken before the end of procedure to detect the retained object.

Was the retained object radiopaque (i.e., detectable by x-ray)?

Enter Yes/ No, or select the button to select from the Code Selection window, select whether the retained object could be detected in Xray or not.

Which of the following best characterizes the surgical event?

Enter or select the button to select from the Code Selection window,the codes that best signify the surgical event.

Which of the following occurred?

Enter or select the button to select from the Code Selection window,the code that best describes the problems that occurred in the event.

What was incorrect about the surgical or invasive procedure?

Enter or select the button to select from the Code Selection window,the exact problem that occurred during the surgical procedure.

If the event involved anesthesia, which of the following best characterizes the event?*

Enter or select the button to select from the Code Selection window,the code that best describes the event when anesthesia was used.

Which of the following best characterizes the airway management problem?

Enter or select the [🔍] button to select from the Code Selection window,the code that best describes the problem in airway management during procedure.

Patient Safety Event Reporting: Device Or Medical/Surgical Supply section

Device Or Medical/Surgical Supply

Which of the following best describes the event or unsafe condition?   *

Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the event or unsafe condition being reported..

Which of the following best describes the device's involvement in the event?

Enter or select the   button to select from the Code Selection window the code that best describes which device caused the incident and how.

What type of operator error?

If Other, Please Specify

Enter or select the [🔍] button to select from the Code Selection window, the code that best describes an error in operating the device that caused the event.

Did the event involve reuse of a device intended for single use (including use of a reprocessed single-use device)?

Enter Yes/ No, or select the [🔍] button to select from the Code Selection window, if the event occurred due to reuse of a medical device that was meant for single use only.

Device(s) Involved Details

Enter the details of the device involved in the event.

Patient Safety Event Reporting: Medication Or Other Substance section

What type of medication/substance was involved?

Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the type of medication or procedure used that led to the event.

What type of medication?

Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the type of medication or procedure used that led to the event.

Please list all ingredients

Enter the constituents of the medication/ substance.

What type of biological product?

Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the type of biological product..

What was the lot number of the vaccine?	Enter the batch/ lot number of the medicine.
What type of nutritional product? **If Other, Please Specify**	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the type of nutritional product used..
Which of the following best characterizes the event?	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the type of event being reported.
What was the incorrect action? **If Other, Please Specify**	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the wrong action that lead to the event.
Which best describes the incorrect dose(s)?	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the incorrect medicine dosage given to patient..
Which best describes the incorrect timing?	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes incorrect timing for giving medicine to the patient.
Which best describes the incorrect rate?	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes incorrect amount of medicine given to patient.
Which best describes the incorrect strength or concentration?	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes incorrect volume or concentration of the medicine given to patient.
What was the expiration date?	Enter the date of expiry of the medication used.
Was there a documented history of allergies or sensitivities to the medication/substance administered?	Enter Yes/ No, or select the [🔍] button to select from the Code Selection window, whether it was recorded that the patient is allergic to the medication provided.
What was the contraindication (potential or actual interaction)? **If Other, Please Specify**	Enter or select the button to select from the Code Selection window the code that best describes potential or actual contradiction the medication caused in the patient and led to the event
What was the intended route of administration? **If Other, Please Specify**	Enter or select the [🔍] button to select from the Code Selection window, the code that best describes the route of administration to handle the event.
What was the actual route of administration (attempted or completed)? **If Other, Please Specify**	Enter or select the [🔍] button to select from the Code Selection window, the code that best describe the actual route of administration used to handle the event.
At what stage in the process did the event originate, regardless of the stage at which it was discovered?	Enter the stage of the procedure at which the event started.

If Other, Please Specify

Medication(s) Involved Details   Enter the details of the medication used in the procedure.

Medication(s) Involved Details

Medication(s) Involved Details

Patient Safety Event Reporting: Summary Of Initial Report (SIR) section

What is the date of this report?

Enter the date when the event is reported.

Where did the event occur, or, if an unsafe condition, where does it exist?

Enter the location where the event or the unsafe condition existed or select the button to select from the Code Selection window. .

If Other, Please Specify

Who reported the event or unsafe condition?

Enter the name of the person who reported the event or unsafe condition.

What is the type of healthcare professional?

Enter the type of healthcare professional who reported the event or select the button to select from the Code Selection window.

Please describe any additional details about the event or unsafe condition discovered after completion of the HERF

Enter the description for the details about the event or unsafe condition after the reporting is completed.

What prevented the near miss from reaching the patient?

Enter the reason that prevented the near miss condition affecting the patient.

Was the event associated with a handover/handoff?

Enter whether event was related to handover or handoff/

Are any contributing factors to the event known? *

Enter Yes/ No if any factors that might have contributed to the event are in known.

What factor(s) contributed to the event?

Enter the factors that contributed to the event or select the button to select from the Code Selection window. .

If Other, Please Specify

Was health information technology (HIT) implicated in this event?

Select Yes/ No if the HIT was required for the event.

Was the event a National Quality Forum (NQF) Serious Reportable Event? *

Select Yes/ No if the event needed to be reported to NQF.

What was the applicable Serious Reportable Event?

Enter details of the serious reportable event

How preventable was the incident?

Enter or select the   button to select from the Code Selection window, whether the event could have been prevented or not.

Linked Event(s) Details

Enter the details of the associated event.

Version Number (System Generated)

Displays the report number .

Extract Status

Displays the status of the report extract.

Patient Safety Event Reporting Form window: Health Care Reporting Form section

Healthcare Event Reporting Form(HERF)

What is being reported?

Enter the event or incident which is being reported or select the button to select from the Code Selection window.

Was there any evidence of harm to a patient at the time of this report?

Enter the required answer(yes/ no /unknown) or select the button to select from the Code Selection window.

Event Discovery Date

Enter the date when the event was found out.

Event Discovery Time

Enter the time when the event was found out.

Briefly describe the event that occurred or unsafe condition   *

Enter a description for the event or incident.

Briefly describe the location where the event occurred or where the unsafe condition exists

Enter a description for the place or location where the incident took place or the unsafe conditions prevail.

Report Date

Enter the date when the event was reported.

Anonymous Reporter   *

Reporter's Name

Enter the name of the person who reported the event.

Telephone Number

Enter the reporter's telephone number .

Email Address

Enter the reporter's email ID..

Reporter's Job or Position

Enter the profession or position which the reported holds.

Which of the following categories are associated with the event or unsafe condition?

Select the button to select the categories associated with the event from the Code Selection window.

If Other, Please Specify   If any additional categories are involved from the list select Others and then specify the categories in text box..

Patient Safety Event Reporting Form window: Patient Information section

Patient Information

Patient's Name   Enter the name of the patient for whom safety event reporting is being done/

Patient's Date of Birth   Enter the patient's date of birth.

Medical Record #   Enter the unique number identifying person's medical record.

Patient's Gender   Enter the patient's gender.

At the time of the event what was the patient's age?   *   Enter the code best describing person's age group or select the button to select from the Code Selection window.

Is the patient's ethnicity Hispanic or Latino?   Select the button to select code best describing whether person's ethnicity is Hispanic or Latino or not.

What is the patient's race?   Enter the person's race or select the button to select from the Code Selection window.

Enter the patient's ICD-9-CM principal diagnosis code at discharge (if available)   Enter the ICD-9 code or select the button to select from the Code Selection window. .

After discovery of the incident, what was the extent of harm to the patient (i.e., extent to which the patient's functional ability is expected to be impaired subsequent to the incident and any attempts to minimize adverse consequences)?   Enter the amount of damage to the patient after the incident or select the button to select from the Code Selection window.

Approximately when after discovery of the incident was harm assessed?   Select the button to select the code that best describes the duration after which damage to patient was checked .

Was any intervention attempted in order to 'rescue' the patient (i.e., to prevent, to minimize, or to reverse harm)?   *   Enter Yes/ No or Select the button to select from the Code Selection window.

Which of the following interventions (rescue) were performed?   Enter the methods of rescue used after the event or select the button to select from the Code Selection window.

f Other, Please Specify   If Others, select the Ellipses button and specify the details in the RISKMASTER editor..

Did, or will, the incident result in an increased length of stay?	Enter Yes/ No or Select the button to select from the Code Selection window.
After the discovery of the incident, was the patient, patient's family, or guardian notified?	Enter Yes/ No or Select the button to select from the Code Selection window.

Unclaimed and Escheat Transactions

Unclaimed Escheat Transaction Overview

You can mark checks and drafts as unclaimed or escheat property in RISKMASTER if they are not cashed within the dormancy period prescribed in the applicable state law. You can set up the dormancy periods for Escheat and Unclaimed transactions for each jurisdiction. After this dormancy period for Escheat and Unclaimed passes, you can mark the transaction as Unclaimed or Escheat.

Once a transaction is marked as Unclaimed or Escheat, the associated funds money goes to the state. If the payees want their money after that period, they have to go to the state. The state owns the money for all Unclaimed records.

To notify the appropriate government office of a transaction in Unclaimed or Escheat status, you must create a BI report.

Only printed payments can be set to Unclaimed or Escheat status. You must manually set the status of a payment to Escheat or Unclaimed. The status is **not** automatically set when the dormancy period passes.

To Set a Dormancy Period for Unclaimed and Escheat Funds Transactions by Jurisdiction

You must set the dormancy period for Unclaimed and Escheat before you can mark payments as Unclaimed and Escheat. The dormancy period for Unclaimed must be less than the dormancy period for Escheat. First a payment must be marked as printed, then Unclaimed, and finally Escheat. Only a printed payment can be set to Unclaimed. A printed payment cannot directly be set to Escheat. A payment in Unclaimed status can be set to Printed or Escheat. A payment in Escheat status can be set to Unclaimed or Printed.

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, select Managers.

3. From the Managers menu, select Funds Dormancy Setup.
   The Funds Dormancy Setup window opens displaying the dormancy data for each Jurisdiction.

4. To setup dormancy data for a new Jurisdiction which is not already present in the list, select the [icon] New button.
   The Funds Dormancy window opens.

5. From the Jurisdiction field, select the button to open the Code Selection window and select the state for which you want to setup Unclaimed and Escheat dormancy duration.

6. In the Unclaimed Days field enter the number of days after which the Funds Transactions become dormant and the status can be marked as Unclaimed.

7. In the Escheat Days field enter the number of days after which the status of the Funds Transaction should be marked as Escheat and is transferred to state.

8. Select the OK button to save the record.

9. Select the Cancel button to exit the Funds Dormancy window.

10. To modify a record, from the table select the option next to the Jurisdiction for which you want to edit the

dormancy date and then select the Edit button.

11. To delete a record select the Delete button.

To Mark Transactions for Escheat and Unclaimed

When a payment has passed the assigned dormancy period for Unclaimed or Escheat it can be set to Unclaimed or Escheat. Only the Funds Transactions with a status of 'Printed' are valid for Unclaimed and Escheat status. You need to manually set the status for each payment separately. Unclaimed and Escheat status is not assigned automatically when the dormancy period passes.

1. Search for and open the Funds Transaction for which you want to mark the dormancy status as Escheat or Unclaimed.

2. On the Funds window, from the Dormancy Status drop down list select the required option.

Note: The Dormancy Status drop down will be enabled only after the dormancy period has passed.

Note: If the funds record is part of a rolled up check all the Funds Transactions in the same rolled up check will receive the same dormancy status.

If the funds record is part of a rolled up check, a window will display containing a list of all the funds transactions involved in the same rolled up check.
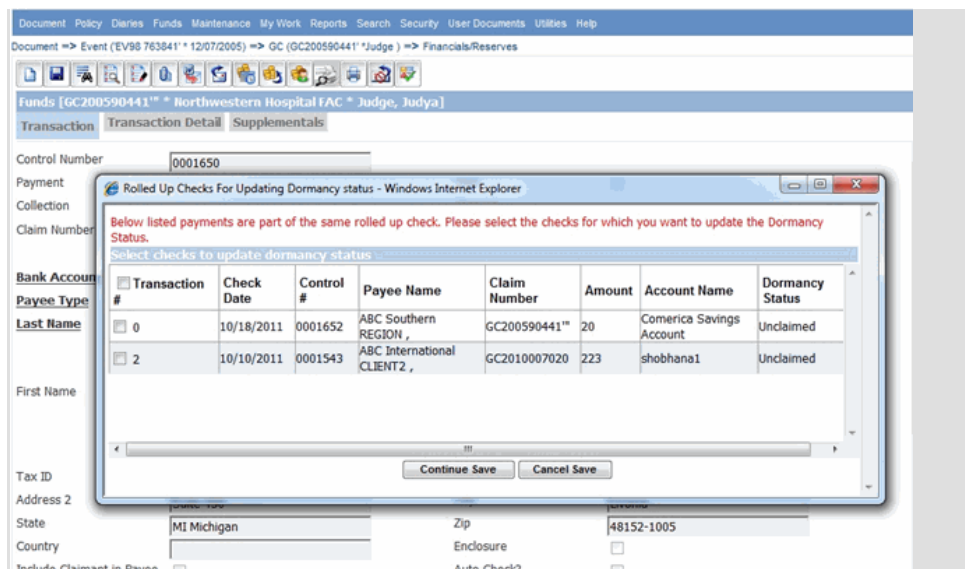
3.   Select the Continue Save button.

Financial to Policy System Interface

To Work with Policy Batch File Update

To activate the Policy Batch File Update in Policy Setup, select the Use Policy System Interface check box and Policy System Financial Updates will use Batch updates option on the General System Parameter Setup window: Carrier Claim Settings tab.

1.   From the Utilities main menu, choose Managers.
      The Managers menu opens.

2.   From the Managers menu, choose Policy Setup.
      The Policy Setup menu opens.

3.   From the Policy Setup menu, choose Policy Batch File Update.
      The Policy Batch File Update window opens and a Policy Batch File Update link displays under the Utilities node in the navigation tree..

4.   Complete the fields on the Policy Batch File Update window, as shown below.

Policy System Name	From the drop down list, select the policy system for which you want to create a batch file.
Control Number	Displays a unique ID for a transaction.
Last Name	Displays the payee's/payor's last name.
First Name	Displays the payee's/payor's first name.
Transaction Type	Displays the reserve account to which RISKMASTER will apply payment.

Reserve Type	Displays the reserve type based on the Transaction Type you selected..
Amount	Displays the amount of the particular transaction split that uses a policy from an external policy system.
Create Batch File	Select the [**Create Batch File**] button to create batch file.

Weblinks

Web Links Overview

You can setup the external web links which you want to access from within RISKMASTER UI. The specified web links would be accessible from the My Work menu. It Provides

- ▪ Ability to navigate to pre-defined URL's from within application.

- ▪ Ability to generate custom URL's passing record informations like Policy Number, Claim Number etc

- ▪ Ability to use calculated parameters in generating the custom URL.

Custom URL links would be stored inside RISKMASTER X application allowing for easy reference when needed.
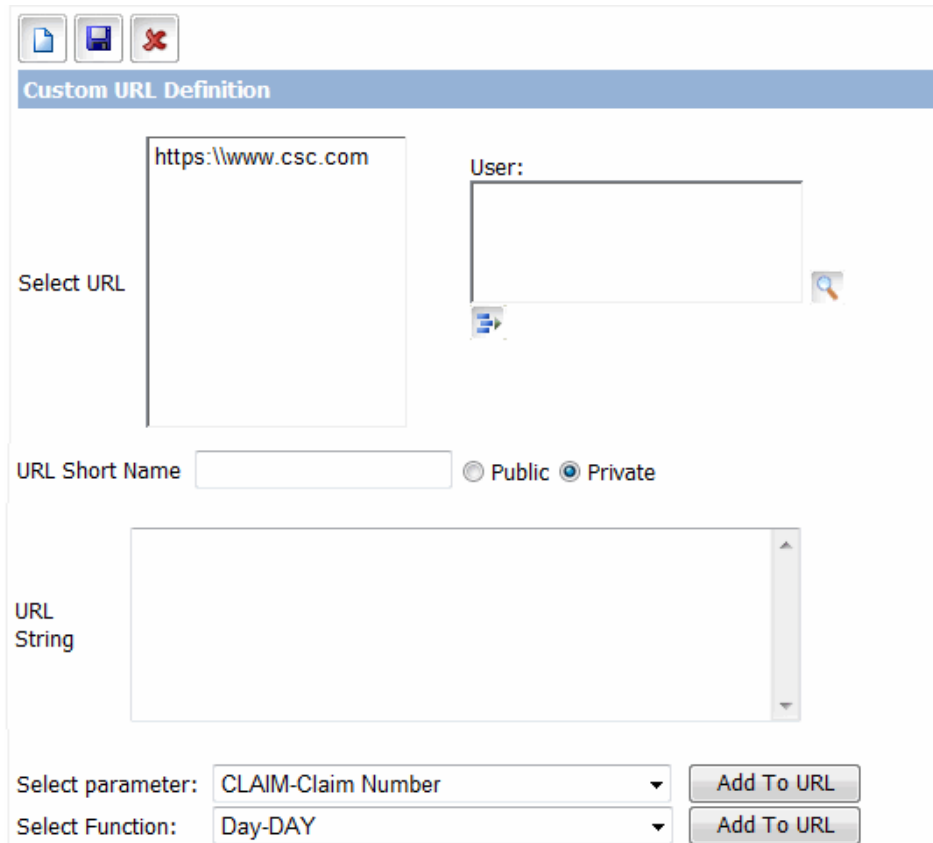
You can select users/groups having access to particular web link.

While working on a particular record (claim, policy etc) , if the you need to navigate to an existing web link for reference then you can select the web link from the My Work menu.

To Setup Web Links

1. From the main menu, select Utilities.
   The Utilities menu opens.

2. From the Utilities menu, select UI Admins.
   The UI Admins menu opens.

3. From the UI Admins menu, select Customization.
   The Customization menu opens.

4. From the Customization menu, select Web Links Setup.
   The Web Links Setup window opens.

5. Complete the fields on the Web Links Setup window , as shown below .

6. Select the Save button.

VSS

VSS Interface Overview

This feature provides an interface to seamlessly work and share information between RISKMASTER Accelerator and Vendor Solutions Suite. The VSS Interface provides features for the complete handling of assignments associated with the processing of a claim from the creation of a claim, assigning assignments and tasks for a claim, processing invoices and closing the claim. A claim can have multiple assignments associated with it and each assignment consists of multiple tasks.

You can view the data you entered in RMA rmA in VSS and VSS will be able to return any additional information and documents back to rmA, reducing data entry time.

You can also access rmA documents from VSS. A VSS web link is available in the My Work menu in RISKMASTER Accelerator to open the Vendor Solution Suite interface. You can use the Vendor Assignment window to assign vendors to entities and use the Vendor Info window to view vendor details.

The Currency for all payments imported from VSS are US Dollar.

Interface Points between rmA and VSS

RISKMASTER Accelerator and Vendor Solutions Suite interact at the following events

1. When a reserve is created / updated. rmA will send the Financial Key. For Carrier claims, VSS will send the key back at both Vendor Assignment acceptance and Invoice Authorize. For Non-Carrier claims, VSS will only send the key back at Invoice Authorize
2. When creating or updating current adjuster
3. When password is changed for a user in rmA domain
4. When a payment is made void in rmA. If that payment is related to VSS
5. When a check is printed for a payment, related to VSS
6. A VSS web link (password pass through) is available in the My Work /Home Page menu in RISKMASTER Accelerator to open the Vendor Solution Suite interface. If the user logged in the rmA also exists in VSS then on clicking this link user will be redirected to VSS assignment page without any login credentials.

To Enable VSS Interface

1. From the main menu, select Utilities.
2. From the Utilities menu, choose System Parameters.
    The System Parameters menu opens.

3. From the System Parameters menu, select General System Parameter Setup.
4. On the General System Parameter Setup window, select the Globalization tab.
5. On the Globalization tab, select the Enable VSS check box, to use the Vendor Solution Suite interface.
    The VSS Assignment windows and VSS Interface Log options would be available in RISKMASTER Accelerator.

To View VSS Interface Log

1. From the main menu, select Utilities.
2. From the Utilities menu, choose Managers.
    The Managers menu opens.
3. From the Managers menu, select VSS Interface log.
    The VSS Interface Log window opens.

4. Complete the fields to search for the requests

Request ID	Enter the ID of the process request for which you want to view the details of the data transaction between rMA and VSS.
From Date	Enter or select the start date for the date range within which you want to search for the data transfer request.
To Date	Enter or select the end date for the date range within which you want to search for the data transfer request
Packet Type	From the dropdown select the type of packet or action for which you want to search the data transfer request
Request Type	From the dropdown select the request type that defines whether records are pushed from rMA to VSS or retrieved from VSS to RMA.
Status	From the drop down select the status of the requests you want to search for

5. Select the Search button to search for requests based on information selected in above fields. The details of the requests display in a table.
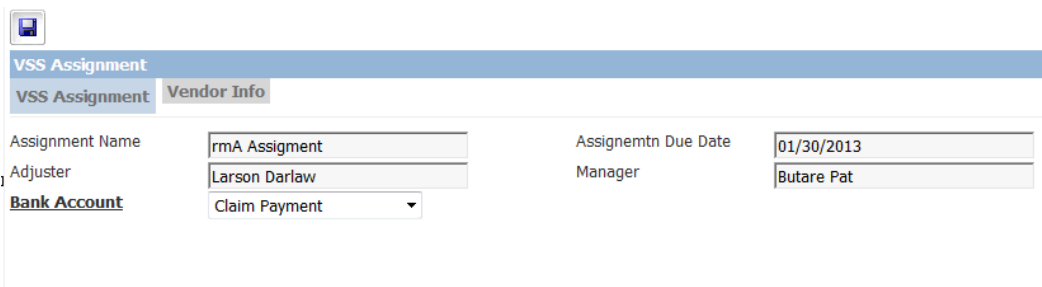
Request ID	Displays the ID of the process request for which you want to view the details of the data transaction between rMA and VSS.
Packet Type	Displays the type of packet or action for which you want to search the data transfer request
Request Type	Displays the request type whether records are pushed from rMA to VSS or retrieved from VSS to RMS.
Status	From the drop down select the status based on which you want to search the requests.
Date	Displays the date when request is processed.
Time	Displays the time when request is processed.
Request Packet	Select the button to view the packet information sent between the systems.
Response	Select the button to view the response from VSS for the request.
Event	Select the button to view the sequence of events and status of request.
Exception	Displays whether any exception occurred while processing the request.

6. From the table, for the required record select the View Request button to view the packet information of request sent between the systems.
7. From the table, for the required record, select the View Response button to view the response from VSS for the request.
8. From the table, for the required record, select the button to view the sequence of events and status for the processing of request.

To View VSS Assignment Information

Create a claim and check 'VSS Claim' check box on the claim window and save the claim. Once a reserve will be created for this claim, relevant information (like basic claim information, claimant, financial key and adjuster) will be pushed to VSS. Every time a reserve is created or updated for this claim information will be sent to VSS.. If any assignment is created or updated for this claim (pushed from rmA) in VSS relevant vendor and assignment information will be displayed in rmA.

1. Search and open the claim for which you want to view the VSS assignment details.
2. From the left navigation tree, under the claim node select the VSS Assignment link.

   The VSS Assignment window opens.

3. Select the VSS Assignment tab.
4. The window displays the information for the VSS assignment as shown in table below.
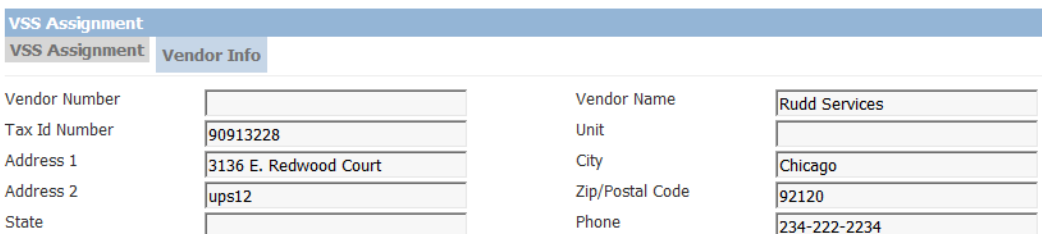
Assignment Name	Displays the name of the assignment given in the VSS system.
Assignment Due Date	Displays the date of the when the assignment is due.
Adjuster	Displays the name of the adjuster for the claim as set in VSS system.
Manager	Displays the name of the manager for the VSS assignment for claim.
Bank Account	From the dropdown list select the bank account which you want to use for the payment of the claim for this VSS assignment.

   > Note: Before making any payment for VSS invoice, first you need to select a back account for the assignment and save it in rmA.

    Select the button to save the record.

5. To view the Vendor Information select the Vendor Info tab,

6. The window displays the information for the vendor as shown in table below.

Vendor Number	Displays the unique number which identifies the vendor in the VSS system.
Vendor Name	Displays the name of the vendor/ company for the unit assigned to the claim.
Tax Id Number	Displays the tax id or SSN of the vendor for the VSS assignment for the claim..
Unit	Displays the unit for the VSS assignment for the claim..
Address 1	Displays the address of the vendor for the VSS assignment for the claim..
Address 2	Displays the supplementary address of the vendor for the VSS assignment for the claim..
City	Displays the city of the vendor for the VSS assignment for the claim..
Zip/Postal Code	Displays the postal code of the vendor for the VSS assignment for the claim..
State	Displays the state of the vendor for the VSS assignment for the claim..
Phone	Displays the phone number of the vendor for the VSS assignment for the claim..

VSS Assignment window: Vendor Info tab

To open
- Open the claim for which you want to view the VSS assignment details.
- From the left navigation tree, under the claim node select the VSS Assignment link.
- On the VSS assignment window, select the Vendor Info tab.

Field definitions

Vendor Number	Displays the unique number which identifies the vendor in the VSS system.
Vendor Name	Displays the name of the vendor for the unit assigned to the claim.
Tax Id Number	Displays the tax id or SSN of the vendor for the VSS assignment for the claim..
Unit	Displays the unit for the VSS assignment for the claim..
Address 1	Displays the address of the vendor for the VSS assignment for the claim..

Address 2	Displays the supplementary address of the vendor for the VSS assignment for the claim..
City	Displays the city of the vendor for the VSS assignment for the claim..
Zip/Postal Code	Displays the postal code of the vendor for the VSS assignment for the claim..
State	Displays the state of the vendor for the VSS assignment for the claim..
Phone	Displays the phone number of the vendor for the VSS assignment for the claim..

VSS Assignment window: VSS Assignment tab

To open	Open the claim for which you want to view the VSS assignment details.
	From the left navigation tree, under the claim node select the VSS Assignment link.

Field definitions

Assignment Name	Displays the name of the assignment given in the VSS system.
Assignment Due Date	Displays the date of the when the assignment is due.
Adjuster	Displays the name of the adjuster for the claim as set in VSS system.
Manager	Displays the name of the manager for the VSS assignment for claim.
Bank Account	From the dropdown list select the bank account which you want to use for the payment of the claim for this VSS assignment.
	Select the button to save the record.

VSS Interface Log

To open
- From the main menu, select Utilities.
- From the Utilities menu, choose Managers.
- From the Managers menu, select VSS Interface log.

Field definitions

Request ID Enter the ID of the process request for which you want to view the details of the data transaction between rMA and VSS.

From Date Enter or select the start date for the date range within which you want to search for the data transfer request.

To Date Enter or select the end date for the date range within which you want to search for the data transfer request

Packet Type From the dropdown select the type of packet or action for which you want to search the data transfer request

Request Type From the dropdown select the request type that defines whether records are pushed from rMA to VSS or retrieved from VSS to RMA.

Status From the drop down select the status of the requests you want to search for

Request Packet Select the button to view the packet information sent between the systems.

Response Select the button to view the response from VSS for the request.

Event Select the button to view the sequence of events and status of request.

Exception Displays whether any exception occurred while processing the request.

Reports

To Run an Available Report

After you post a report and RISKMASTER displays the report on the Available Reports window, you can run the report.

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std Reports Queue.

3. From the Std Reports Queue menu, choose Available Reports.
   The Available Reports window opens and an Available Reports link displays under Reports node in the left navigation tree.

4. Select the link for the report that you want to run.

   A Run Report window opens and a

5. Complete the fields on the Run Report window , as shown below .

4.

Run Report	Select to run the report.
Report Info	
Report Title	Displays the report title. You can enter a new title.
Report Subtitle	Displays the report subtitle. You can enter a new subtitle.
Optional Output Name	Enter text you want to include in the report filename for the generated reports.
	RISKMASTER uses this text along with a unique ID and an extension to name the report file.
Output Type	From the drop down list select a format for the report output.
Run Report	From the drop down list:
	• Select **Immediately** to run the report as soon as you select the Run Report button on this window.
	• Select **At Specific Date/Time** and then enter a Start Date and Start Time, to run the report at the time you specified.
Notification Type	From the drop down list, select what to include in the notification email that RISKMASTER will automatically generate each time a report is run.
Email to	Enter the email addresses of people you want to send e-mail notification to each time a report is run.
	Note: Separate multiple e-Mail addresses with a semicolon.

Optional Email Message	Enter the message you want to include in the notification email.
Report Criteria	Displays the report criteria that were defined when RISKMASTER created the report. You can change the report criteria.

You cannot add additional report criteria.

5.
6.   Select Run Report.

RISKMASTER runs the report and adds it to the Job Queue window.

7.   After the Status column for the report displays Complete, select the Job Name link.

Your report opens.

To E-mail a Report

1.   From the main menu, select Reports.
The Reports menu opens.

2.   From the Reports menu, choose Std Reports Queue.

3.   From the Std Reports Queue menu, choose Job Queue.
The Job Queue window opens and a Job Queue window displays in the left navigation tree.

4.   Select the check box for the report that you want to email.

5.   Select the E-Mail button.
The E-mail Report Jobs window opens.

6.   From the Please select the Users to E-Mail to, select the users to whom you want to e-mail the report.

Note: To select multiple recipients, press the Ctrl key and then from the field select the recipients.

7.   In the Also E-mail to field, enter the E-mail id of any other user to whom you want to e-mail the report.

Note: Separate multiple E-Mail addresses with a semicolon.

8.   In the Message for the Recipients field, enter a subject or message that you want to e-mail with the report.

9.   Select E-mail.
RISKMASTER sends an email to the selected recipients.

To Archive Reports

1.   From the main menu, select Reports.
The Reports menu opens.

2.   From the Reports menu, choose Std Reports Queue.

3.   From the Std Reports Queue menu, choose Job Queue.
The Job Queue window opens and a Job Queue link displays under the Reports node in the left navigation tree.

4.   From the list of report jobs, select the check boxes for all the jobs you want to archive.

5.   Select Archive.
The Archive Report Jobs window opens.

6.   From the Please select the folder to archive job(s) to field, select the folder from your User Documents list to archive the selected jobs to.

7.   Select Archive.

RISKMASTER saves the selected job to the folder you selected and removes the job from the Job Queue window.

Delete Available Report window

Use the Delete Available Reports window to delete reports. You can only delete reports if you have the appropriate permissions. For questions about your permissions, contact your system administrator .

To open
- From the main menu, select Reports.

- From the Reports menu, choose Std Reports Queue.

- From the Std Reports Queue navigation tree, select the Delete Report.

Field definitions

Report Name   Displays all available reports. Select the check box for a report.

Report Description   Displays a description of the report.

Delete Selected   Select to delete the selected report.
Report

To Post SORTMASTER Draft Reports

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std Reports Designers.
   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose Post SM Draft Reports.
   The Post Draft Reports window opens and a Post Draft Reports link displays under the Reports node in the left navigation tree.

4. Select the check boxes for the draft reports you want to post to the Available Reports window.
5. From the Users list, select the users you want to give access to the report to.

Note: To select multiple users, press the Ctrl key and then from the field select the users. After you allow or disallow users to access this report, only a system administrator can change these permissions.

6. Select Post.
   'Report Posted Successfully' displays on the window.

Note: If this message does not display, your report was not posted.

To Post SORTMASTER World Draft Reports

You can post reports created in SORTMASTER Windows version and then run the reports in .

To post SORTMASTER World draft reports:

1. From the main menu, select Reports.

The Reports menu opens.

2. From the Reports menu, choose Std Reports Designers.
   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose Post SM/World Reports.
   The Post New Report window opens and a Post SM/World Reports link displays under the Reports node in the left navigation tree.

4. In the Report Name field, enter a name for the report.
5. In the Report Description field, enter a description for the report.
6. From the Report File Name field, select the Browse button.
   A file browser opens.

7. Select the report file for the report you want to post.
   RISKMASTER enters the file path for the report file into the Report File Name field.

8. From the Users list, select the users you want to give access to the report to.

Note: To select multiple users, press the Ctrl key and then from the field select the users. Once you allow or disallow users to access this report, only a system administrator can change these permissions.

9. Select Save.
   'Report Posted Successfully' displays on the window.

Note: If this message does not display, your report was not posted.

To View Scheduled Reports

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std Reports Queue.
3. From the Std Reports Queue menu, choose View Scheduled Reports.
   A window opens and displays a list of reports that are scheduled to run on a recurring basis.

4. Select a column name to sort the list.

5. To edit the schedule for a report, select the report name link.

6. To delete one or more scheduled reports, select the check box for the report and select the button.

To Schedule Reports

You can set up when and how to run reports in the future. You can set reports up to run at Monthly or Daily intervals.

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std Reports Queue.
3. From the Std Reports Queue menu, choose Schedule Reports.
   The Schedule Reports window opens and a Schedule Reports window displays under the Utilities node in the left navigation tree.

4. Complete the fields in the Schedule Reports window , as shown below .

Please select schedule type you would like to create	From the drop down list select whether you want the scheduled report to run **Daily** or **Monthly** .
Select Report that you would like to Schedule	From the drop down list select the report to run.
Start Date	Enter the date on which you want to start running reports.
Start Time	Enter the time when you want to start running reports.
	You must enter time in the format xx:xx, with a colon : between the hours and minutes. Time you entered defaults to AM.
Days	Select the days you would like to run reports on.
Report Info	
Report Title	By default, RISKMASTER enters the Report Name for the report you selected. You can rename the report if you want to.
Report Subtitle	Enter an additional subtitle for the report.
Optional Output Name	Enter text you want to include in the report filename for the generated reports. RISKMASTER uses this text along with a unique ID and an extension to name the report file.
Output Type	From the drop down list, select a format for the generated reports.
Notification Type	From the drop down list, select what to include in the notification email that RISKMASTER will automatically generate each time a report is run.
Email to	Enter the email addresses of people you want to send email notification to each time a report is run. To enter multiple email addresses, separate email addresses with semicolons.
Optional Email Message	Enter the message you want to include in the notification email.

5. Select Save.

A window opens and displays all scheduled reporting activity.

DCC

To Create a DCC Report

1. From the main menu, select Reports.

The Reports menu opens.

2.   From the Reports menu, choose Others.

The Other menu opens.

3.   From the Other menu, choose DCC Reports.

The DCC window opens and a DCC reports link displays under the Reports node in the left navigation tree.

4.   Select the Add button.

The Add New Report window opens.

5.   From the Template Name drop down list, select a template to use for this report.
6.   In the Report Name field, enter a name for the new report.
7.   In the Report Title field, enter the report title you want to display at the top of the report.

8.   Select Save.

RISKMASTER adds the report to the DCC window.

To Create a DCC Report Template

You must have the proper permissions to add or edit templates . To add templates you must know how to write SQL scripts and you must have a good knowledge of your database. When you change a template all reports based on that template also change.

To add a DCC report template

1.   From the main menu, select Reports.

The Reports menu opens.

2.   From the Reports menu, choose Others.

The Others menu opens.

3.   From the Others menu, choose DCC Reports.

The DCC window opens and a DCC reports link displays under the Reports node in the left navigation tree.

4.   Select the Templates button.

The DCC Template window opens.

5.   Select the Add button.

The Add New Template window opens.

6.   In the Name field, enter a name for the new template.
7.   Select the Show Percent check box to display percentages in the report.
8.   Select the Show Graph check box to display a graph view when you select the DCC Display button for the report.
9.   To add a new filter, select the Add Filter button.

The Add New Filter window opens.

10. Enter information in the Add New Filter window.

Note: CSC recommends that you do not enter new filters unless you know how to write SQL scripts and unless you know your database well.

11. On the Add New Filter window, select Save.
12. To add new outputs, select the Add Output button.

The Add New Output window opens.

13. Enter information in the Add New Output window.
14. On the Add New Output window, select Save.
15. On the Add New Template window, select Save.

RISKMASTER adds the template to the DCC Template window.

To Edit a DCC Report

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Other Reports.
   The Other Reports menu opens.

3. From the Other Reports menu, choose DCC Reports.
   The DCC window opens and a DCC reports link displays under the Reports node in the left navigation tree.

4. Select the [icon] button next to the report you want to edit.
   The Edit DCC Report window opens.

5. Change information on the Edit DCC Report window , as shown below .

Template Name	Displays the template this report is based on.
	If this template changes the report will also change.
Report Title	Enter the report title.
Filters	Displays the filters you defined for this template. Select the check box for a filter to apply that filter to the report.
Outputs	From the drop down list select the outputs to include in the report and then select the Add button. The outputs you select are displayed in the Outputs field. Use the up and down arrows to move a field up or down. Use the Delete button to remove an output from the list.
Show As Graph	Select the check box if you want to display the report data in graph form when you select the DCC display button for the report.
Graph Group	Select a graph group.
Graph Data	Select the graph data.
Graph Type	From the drop down list select the graph type.

6. Select Save.

To Edit a DCC Report Template

You must have the proper permissions to add or edit templates . To edit templates you must know how to write SQL scripts and you must have a good knowledge of your database. When you change a template all reports based on that template also change.

To edit a DCC report template

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Other Reports.
3. The Other Reports menu opens.

4.　From the Other Reports menu, choose DCC Reports.

　　The DCC Reports window opens and a DCC reports link displays under the Reports node in the left navigation tree.

5.　Select the Templates button.

　　The DCC Template window opens.

6.　Select the button next to the report you want to edit.

　　The Edit Template window opens.

7.　Change information on the Edit Template window , as shown below .

Note: When you change a template all the reports based on the template will also change.

Name	Enter a name for the template.
Show Percent	Select the check box if you want to include a percentage column in the report.
Show Graph	Select the check box if you want to display the report data in graph form when you select the DCC display button for the report.
Filters	Displays the filters you defined for this template.
Outputs	Displays the outputs you defined for this template.
Delete Selected	Select the check box for an existing filter or output and select this button to delete the selected filter or output.
Add Filter	Select to open the Add New Filter window and enter the SQL scripts for the template.
	CSC recommends that you enter filters only of you are well-versed in SQL and if you know your Database well.
Add Output	Select to open the Add New Output window and define your output.

8.　Select Save.

To Run a DCC Report

1.　From the main menu, select Reports.

　　The Reports menu opens.

2.　From the Reports menu, choose Other Reports.

　　The Other Reports menu opens.

3.　From the Other Reports menu, choose DCC Reports.

　　The DCC window opens.

4.　From the list of reports, select the link for the report you want to run.

　　The report opens.

StataWare

StrataWare Bill Review System

Using this feature you can access the StrataWare Bill Review system directly from RISKMASTER Accelerator.

The StrataWare system account should be created with the same email address specified for the RISKMASTER user in the Security Management System.

The RISKMASTER users can access the StrataWare website using single sign on.

To Set Up StrataWare

1. From the main menu, choose Utilities> System Parameters> General System Parameter Setup.

    The General System parameter Setup window opens.

2. On the General System Parameter Setup window: System Settings tab , select the Use StrataWare checkbox to activate the StrataWare Bill Review services.

3. On the General System Parameter Setup window: System Settings tab , select the 'Use single user for StrataWare sign on' checkbox.

Note:If 'Use single user for StrataWare sign on' check box is disabled then you must be logged in as a user whose account is linked and setup with StrataWare

4. In the User field, select the lookup button to choose the user account which you want to use for the StrataWare single sign on.

Note: This field is enabled only when the ' Use single user for StrataWare sign on' check box is selected.

5. In the Consumer Service URL field, enter the address of the consumer

6. In the Service Provider URL field enter the address of the StrataWare service provider.

To Access StrataWare Bill Review System from RISKMASTER

1. From the main menu, select My Work

2. From the My Work menu, select StrataWare.

    The StrataWare webpage opens.

UX Dashboard

Introduction

RISKMASTER UX is developed with the prime objective to display rmA system information in an informative & precise chart format. Dashboard screen consists of multiple charts & graphs that provide system/environment wide information for any claim or financial.

<u>Note</u>: User can modify dashboard according to the requirement.

Login to UX Dashboard

A Login box appears on the computer screen with specified slots for filling your login credentials. This box can be pin & unpin as per the requirement. In the background of the login box, rmA page will appear and the user can access to that page by unpining the box. The Login Box consists of following tools and boxes:

Login Box

	Select to pin and unpin the Login Box on the system.
	Select to fill your user name.
	Select to fill your password.
Forgot your password?	Select when you forget your password and require to set a new password.
Sign In	Select to sign in to the UX Dashboard after filling the correct login-in credentials.
Select Datasource	Select after signing-in, to choose a Data Source you want to work on.
Continue	Select to continue on the UX Dashboard.

User interface

The UX Dashboard user interface can be better understood when explained in to different frames. The left hand side frame consists of a menu bar, which can be expand or contract on click, displays the name of the functions covered in UX Dashboard. When the menu bar consists of 'Selected DSN name', 'Type of View (Default view)', 'User Name', 'Dashboard section', 'Claims Section', 'Supervisory Approval Section', 'SMS section'. The right hand side frame consists of a tool bar and an Enable Edit Mode button for performing various operations on dashboard page.

You can access many functions of the UX Dashboard from the tool bar. Along with the navigation elements described here, you can use your browser's navigation buttons to go to the previous window, go to the next window, and so on.

The UX Dashboard Screen & Tool bar

	Select to expand or contract the function menu.

	Select to search Claims by claimant last name.
	Select to go back to the previous menu after claim search.
	Select to get the notifications of Due Diaries.
	Select to see the UX screen in different themes. (Available Themes: Cosmo, Paper, Spacelab, Flatly, Simplex and Lumen)
	Select to log-out the UX Dashboard.
	Select to see the list of 10 recent claims & events updated by current user.
	Select to make essential changes on UX Dashboard.
	Select to add new widget.
	Select to display widget in the format you want.
	Select to save changes.
	Select to undo changes and reload.

User Setting & Configuration

Users can set his/her own profile and configure other users as per the requirement from the dashboard screen only. Additionally, they can switch to the other DSN for accessing different functions.

Settings Definitions

Profile	Select to set & edit personal information including E-mail, Name, City, Zip, Phone Number etc.
Configure User	Select to configure user(s) / Groups(s) to your profile.
Change Database	Select to change the database.
Logout	Select to logout the dashboard.

Widgets

Following is the list of widgets available on UX Dashboard. You can add a widget from the list by navigating to:

From the UX Dashboard Screen, Select **'Enable Edit Mode'** .

Select **'Add New Widget'** from the tool bars opens-up.

Select the **Widget** from the list you want to add & see on the dashboard.

Widget List

Approve Matrix	Shows the count of approvals left for user to approve.
Claim Department	Shows claim stats based on claim departments.
Claim Lob	Shows claim stats based on claim line of business.
Claim Payments	Shows reserve stats for total incurred.
Claim Payments Paid	Shows reserve stats for total paid.
Claim Policy LOB	Shows claim stats based on claim policy Line of Business.
Claim Stats	Shows claim stats based on claim stats.
Claim Status	Shows claim stats based on claim status.
Claim Type	Shows claim stats based on claim types.
Diary Calender	Shows diary calender of the user.
New Claims	Shows new claim count of user.
Overdue Diaries	Shows overdue diary count of user.
Pending Claims	Shows pending claim count of user.
To do List	Shows Todo list of user.

SORTMASTER

SORTMASTER Overview

SORTMASTER is a report writer that enables you to create and maintain completely customized reports of your risk data. Using SORTMASTER, you can customize a sample report template or create your own reports to analyze your risk management data.

With the Graph Options features, you can produce a wide variety of graphic presentations. Additionally, SORTMASTER translates the report criteria into an optimized SQL statement which can be used to export data into other report-writing or spreadsheet applications such as Excel.

Key Features

SORTMASTER is designed to help you generate reports from your RISKMASTER data. SORTMASTER enables you to:

- Generate multi-query reports .

- Define report appearance by specifying text and graphical format and printing specifications for the reports. You can also specify how you want SORTMASTER to sort and calculate data.

- Add derived fields to your reports.

- Generate graphs to visually display your report data.

- Export report data to Microsoft Excel for further analysis.

- Distribute reports you generate via the web, email and print.

Preview and Run SORTMASTER Reports

After you create a new report or open an existing report in SORTMASTER , you can post and run the report in RISKMASTER.

Use the following buttons on the toolbar to post reports from the Report Designer:

When you select the Save and Post button, SORTMASTER adds your report to the Available Reports window. You can run the report from the Available Reports window.

When you select this button, SORTMASTER also adds your report to the Draft Reports window.

When you select the Preview in Excel button, SORTMASTER immediately runs your report and opens the report in Microsoft Excel format. You can preview the report and close it to return to SORTMASTER.

When you select this button, SORTMASTER also adds your report to the Draft Reports window.

When you select the Preview in PDF button, SORTMASTER immediately runs your report and opens the report in Adobe Acrobat in PDF format. You can preview the report and close it to return to SORTMASTER.

When you select this button, SORTMASTER also adds your report to the Draft Reports window.

Linking Criteria Overview
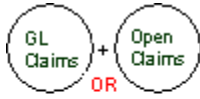
Using the AND and OR options, you can link conditions for values or ranges to create more specific criteria. These options enable you to join parameters to build criteria statements. You can link criteria for the same field and you can link criteria for different fields.

Link criteria within the same field when you want to link data contained in a single field. For example, when you include only those claim numbers that begin with WC95 OR GC95, you are linking criteria within the claim number field.

Link criteria from different fields when you want to create criteria statements based on different types of data contained in different fields. For example, when you include only those claim numbers that begin with WC95 OR that were entered after January 1, 1995, you are linking data from the claim number field and the claim date field.

> Note: Before you can use any of the link options, you must add at least one criteria statement on the Report Designer: Report Criteria tab.

The AND operator is available only when you define Value criteria. When you use AND, each record included in your report must meet both the criteria values you specify. Therefore, your report will contain fewer items when you use the AND operator. For example, if you build "Claim Number Contains WC95 AND Claim Date Greater Than 01/01/95," your report will contain only those records entered after January 1, 1995, that have WC95 somewhere in the claim number.

When you use the OR operator, the records included in your report can meet any one of the criteria you specified. Therefore, your report will contain more items when you select the OR operator. For example, if you build "Claim Number Contains WC95 OR Claim Date Greater Than 01/01/95," your report will contain all records entered after January 1, 1995 as well as all records with WC95 in the claim number.

You can exclude all data from the report if you select too many qualifiers. For example, if you build "Claim Number Equal WC95" AND "Claim Number Equal WC94," you will find that no records are included since a claim number is unique. A single record cannot have two distinct claim numbers.

If you use multiple AND statements, always enter the expression that will return the least amount of data first. If you use multiple OR statements, always enter the expression that will return the most amount of data first.

Tables and Fields

SORTMASTER gives you access to over 150 tables to extract data from for your reports. CSC recommends that you choose either the Claims or the Events table to begin most reports. These tables provide you with the greatest number of linkages to other tables and give you greater flexibility when you build your report.

Tables in SORTMASTER have a one-to-one mapping with windows in RISKMASTER. So the Events table extracts data you entered into the Event window in RISKMASTER.

Each table contains fields. When you create a report you select fields to include in the report. Each field you select becomes a column in your report. While selecting fields for your report, consider this:

- What is the primary function of the report?

- Who is the intended audience?

- What field will be the primary sort ?

- What, if any, sub-sorts will there be?

- Is the number of claims or events important?

- What order should the fields be in to create a logical, easy- to-read report?

Reports Designer

Multi-Query Report Overview

In SORTMASTER you can generate multi-query reports. When you create multi-query reports, an SQL statement is generated for each field you include in the report.

Using multi-query reports, you can extract data from the RISKMASTER database and sort this data, apply properties to the data, and generate graphs to display the data.

You can format the appearance of reports, distribute reports via the web, and export reports to other applications such as Microsoft Excel.

In multi-query reports the first field you select is key, and you summarize all remaining fields against the first field.

You can apply criteria to any field in the database even if you do not include the field in your report.

You can add a field multiple times if you need to use the field as multiple report columns with each column defined by another database field. For example, you can use two Reserve Amount columns, one for Indemnity and one for Expense.

You can apply a criteria on the aggregate value of a column. For example, you can define a criteria of total payments greater than $100 instead of a criteria specifying a payment greater than $100.

As Of reports Overview

As Of reports display data "as of" a particular date you specify. When you create As Of reports SORTMASTER ignores data you entered into the database after the date you selected. For example, when you create an As Of report of a claim's value and status, SORTMASTER ignores reserves and payments made since the As Of date you specified.

Tips for setting up As Of reports:

- Set up As Of reports as Summary reports.

- Always enter the As Of date.

- Use the Financial History table for all financial reports (reserves, paid, collection, and incurred values).

- Use the Claim Status History table to report the Claim Status as of the date you specified.

- Use the roll up option when using both open and closed statuses from the Claim Status History table.

- Use to create loss runs as of a particular date.

Tips for Creating Reports

- Plan your report before starting.

- Create a list of the fields you want to include in the report.

- Select the tables that contain the fields.

- Start with 3 key fields and run the report to check if you are getting the expected results.

- Add additional fields one or two at a time and run the report before adding more.

- Put fields in a logical order.

To Create a Multi-Query Report

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std. Reports Designers.
   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose SM Designer.
   The Report Designer opens.

4. Select the ⬚ button.

5. Select and complete the fields in the Report Fields tab, as shown below.

4.

Starting Table	From the drop down list select the table to use as the primary table for your report.
	CSC recommends that you select either the Claims table, or the Events table for all reports.
As of	Select the check box to specify a date as the cut-off point for collecting data for the report.
	Enter a date in the Date field. SORTMASTER includes data entered before and on the date you enter in your report.

Report Type (this option is not available for Summary Financial reports)

Detail	Select to display a line-by-line detail of the event or claim data in your report. A detailed report is most useful when you want to see each transaction or record. Use this option primarily with non-financial data.
Summary	Select to display a summary of the data you included in the report.
	You must set a property for every field or use a break between every field you select.
Both	Select to create a detailed report and also display summary information at the end of the report.
	For example, select this option when you sort information by department and want to see the data recapped in summary for each of the subtotals.
Current Level	Displays the currently selected table.
Fields	Select a field you want to include in your report and then select the Add button.
	You must select at least one field from the starting table before you can open a related table and select a field.
Related Tables	Select a table and then select the Down level button to display the fields in the Fields field.
	You must select at least one field from the starting table before you can open a related table and select a field.

Down Level	Select a table (folder) and then select this button to display the fields in the selected table.
Up Level	Select to close the table you have opened and display the fields in the parent table.
Add	Select a field and then select this button to include the field in the report.
Del	Select a field from the list of fields included in the report and then select this button to remove the field from the report.

> To delete the first field from the Starting Table, you must first delete all the fields below it.

Report Columns	• Select **Up** to move the selected field up in the list of selected fields.
	• Select **Down** to move the selected field down in the list of selected fields.
	• Select **Properties** to open the Report Column Properties window and edit properties for the selected field.

5.
6. Select and complete the fields in the Report Criteria tab , as shown below.
6.

Column	From the drop down list, select the field for which you are setting criteria.
Parameter	Select the check box, if you are creating a run-only report and you want to enter a prompt for the run-only report.
Prompt Label for this Parameter	Enter a prompt that will display when you try to run a run-only report.
Criteria	Displays the criteria that you have applied parameters to.
Global Criteria	Displays the parameter statement for the global criteria you set.
Set Global Criteria	Select to open the Global Criteria window, and set criteria at the claim level and not just the field level. For example, if you set global criteria on a reserve field, the criteria applies to all reserve categories for that claim.

> This button is only available for financial fields with sum selected on the Report Column Properties window.

Report Criteria	Displays the parameter statement you created.
	The parameter statement uses SQL statement nomenclature to describe the range, value, or code criteria you set for the selected field.

Add Criteria	Select to open the Select Criteria Field window. In the Select Criteria Field window:

- From the Field drop down list, select a field.

- Select **Value** to set a value criteria.

- Select **Range** to assign a range.

- Select **Code** to assign code criteria.

- Select **OK** to open the Criteria window .

Toggle AND/OR	This option is only available for single-query reports.
DISTINCT Rows	Select the button to display only unique rows in a report.
Edit Criteria	Select a criteria from the Criteria field and then select this button to open the Criteria window and edit the selected criteria.
Delete Criteria	Select a criteria from the Criteria field and then select this button to delete the selected criteria.
Undo Add	Select to delete the last criteria you added.

7.
8. Select and complete fields in the Report Options tab , as shown below.
8.

Report Title	Enter a descriptive title for the report.
	If you want to enter a second title line or a subtitle, enter it in the next field.
Left/Center/Right	Select either the Left, Center, or Right option to set the title alignment.
Title Font	Select to open the Font window. In the Font window, select the font, font size, color and other attributes for the title, then select OK.
HTML	Select to open the HTML Options window . In the HTML Options window, set options for the report in HTML format, if you export the report in HTML format.
Headers & Footers	Select to open the Headers & Footers window, and enter the header and footer information that you want printed on each window of the report.
	Enter header and footer codes on this window to automatically include system information.
Report Font	Select to open the Font window. In the Font window, select the font, style, size, and script for the report text, then select OK.
Print Row Number	Select the check box to number each row in the report.

Column Properties	From the drop down list, select the column for which you want to define the appearance.
Column Heading	If you want to overwrite the existing column heading, enter a new column heading.
Width	From the drop down list select a width for the selected column.
Left/Center/Right	Select either the Left, Center, or Right option to set the alignment for the column text.
Effects	• Select **Gray Shading**, to color the column background grey.
	• Select **Bold Text** to bold the column text.
	• Select **Italic Text** to italicize the column text.
Border	Select where you want column borders to display.
Agg. Prefix	Select to open the Prefix for Aggregate Rows window, and rename the prefix that displays on the aggregate line of the report.
	This option is only available if you selected Aggregate on the column properties window.
Color	Select to open the Color palette and assign a color to the column text.

9.
10.   Select and complete the fields in the Graph Options tab , as shown below.
10.

Graph Type	From the drop down list select the type of graph you want to create.
Graph Style	From the drop down list select the style option you want to use for your graph.
Perspective	For 3-dimensional graphs (3d Bar Graph), from the drop down list select the amount of 3-dimensional depth you want for your graph.
Graph Data	• Select **Summary** to display summary data in your graph.
	• Select **Detail** to display detailed data in your graph.
	Certain types of graphs can only display either summary or detailed information, in which case you will not need to choose.
Colors	• From the **Foreground** drop down list select a color for the title, label, and grid.
	• From the **Background** drop down list select a color for the graph background.

> Color selections in the Graph Options tab affect the appearance of the graph display in the Sample window and Graph View mode only, and do not translate color selections to color printers.

Grid	Select the Vertical or Horizontal check boxes to display vertical and horizontal grid lines.
Labels	Select the X-axis or Y-axis check boxes to display labeled X and Y axes.
Graph Title	Enter a title for your graph.
Left Title	Enter a title for the Y-axis.
Bottom Title	Enter a title for the X-axis.

11.

12. Select the Save and Post button .

   The Report saved window opens.

13. In the Users field, select the users who will be able to access this report.

14. Select Post.

   RISKMASTER saves the report in the Available Reports window. You can run the report from the Available Reports window.

To Open an Existing Report

1. From the main menu, select Reports.

   The Reports menu opens.

2. From the Reports menu, choose Std. Reports Designers.

   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose SM Designer.

   The Report Designer opens.

4. Select the Open button .

   The Open Local Report window opens.

5. In the Report Name field, enter a name for the report.

6. In the Report Description field, enter a description for the report.

7. In the Report File name field, select the Browse button.

   A File Browser opens.

8. Navigate to the report file you want to open, and select Open.

9. In the Users field, select the users who will be able to access this report.

10. Select the Save button.

   The report opens in the Report Designer.

11. If you want change the fields in the:

   - Report Fields tab

- Report Criteria tab

- Report Options tab

- Graph Options tab

12. Select the Save and Post button .
13. The Report saved window opens.

14. In the Users field, select the users who will be able to access this report.
15. Select Post.

    RISKMASTER saves the report in the Available reports window. You can run the report from the Available Reports window.

To Clone a Report

You can select an existing report from the SM Draft Reports window and create a copy of the report and then edit the report.

> Note: You can Save As a report when the Report Designer is open. To edit the "Saved As" report, you will have to open the Report Designer for the report. The Report Designer for the report you clone opens automatically.

To clone a report

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std Reports Designers.
   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose SM Draft Report.
   The SM Draft Reports window opens.

4. Select the check box for the report you want to clone.
5. Select the Clone button.
   The Save Report window opens.

6. On the Save Report window, in the Report Name field, enter the name of the report.
7. On the Save Report window, in the Report Description field, enter the description of the report.
8. Select the OK button.
   The Report Designer opens.

9. Edit the fields on the following tabs, if required:

    - Report Fields tab

    - Report Criteria tab

    - Report Options tab

    - Graph Options tab

10. Select the Save button .

    RISKMASTER saves the report in the Available Reports window. You can run the report from the Available Reports window.

To Set Column Properties

1. From the main menu, select Reports.

The Reports menu opens.

2. From the Reports menu, choose Std. Reports Designers.
   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose SM Designer.
   The Report Designer opens.

4. On the Report Fields tab, from the Starting Table drop down list, select Claims .
5. From the list of fields, double click fields to add to your report.
6. From the list of fields you added to your report, select the field to set properties for.
7. Select the Properties button.
   The Report Column Properties window opens.

8. Select formatting options on the Report Column Properties window , as shown below .

7.

Stacked	Select the check box to display the data in this field in the previous column.
Include Field in Report	Select check box if you want to include the field in the report.
	You can apply criteria to a field even if you do not want to include the field in the report.
Print Sub Total	Select check box to total data within a column when you have set one or more column breaks.
Roll Up	Select to combine multiple lines of data from one record into a single row.
	You can select this option only for summary reports.
Column Break	• Select **None** if you don't want to group data in a column.
	• Select **Break** to force grouping for a field.
	• Select **window** to group or sort like data within a column by window.
	You can use window breaks for breaking by hierarchy level, claim type, and claim status.
	• Select **Banner** to use the selected field as a heading over the next column and stack the columns.

| Column Aggregate | • Select **None** to not apply column aggregates. |
| | • Select **Count** to count each record as it displays in the report, even if it displays multiple times. |

You can use this option only for financial reports. However, do not use this option in summary reports containing financial fields.

| | • Select **Unique Count** to count each record only once. |

CSC recommends that you select this option for counting. This option works very well when used with claim number or event number.

	• Select **Sum** to get totals for a financial column.
	• Select **Min** to calculate the minimum value within a column.
	• Select **Average** to calculate the average for all the data within a column.
	• Select **Max** to calculate the maximum value within a column.
Column Sort	• Select **None** if you don't want to sort column data.
	• Select **Ascending** to sort data from the lowest value to the highest value.
	• Select **Descending** to sort data from the highest value to the lowest value.
Free Text Properties	• Select **Default lines Per Row** to show all lines of Free Text.
	• If you do not want to use the default lines per row, don't select the check box and in the **Max Lines Per Row** field enter the number of lines to include per row.
Fiscal Year	Select the check box to print the fiscal year instead of the claim date or the event date and group financial data by fiscal year.

You must first set up fiscal year in Utilities . This option is only available for date fields.

| Organization | If you selected the Fiscal Year check box, from the drop down list, select an organization level to use the fiscal year for that organizational level. |
| Line of Business | If you selected the Fiscal Year check box, from the drop down list, select a line of business to use the fiscal year for that line of business. |

8.
9. Select OK.
10. Complete the report.

To Change Column Names for Aggregate Values

You can specify a prefix for the title of an aggregate line of the report. You can only use this option if you selected a Column Aggregate on the column properties window.

When you enter a prefix, the prefix you specify replaces the word "Records:" on the aggregate line in your report.

1. Open or create a report.
2. On the Report Designer, select the Report Options tab.
3. In the Column Properties tab, from the drop down list, select the field you want to rename.

4.   Select Agg. Prefix.

The Prefix for Aggregate Rows window opens.

5.   From the list of functions, select the function for which you are changing the title on the report.

6.   In the field, enter a prefix.

7.   Select Done.

8.   On the window that displays, select OK.

9.   Complete the report.

To Format Column Appearance

You can format columns after you create a report. When you format columns after creating a report, you can instantly view your report with the new formatting.

1.   Open or create a report.

2.   Right click on the column you want to format.

The Column Properties window opens.

3.   Select options on the Column Properties window , as shown below.

2.

Column name	Displays the column name for which you are assigning properties.
Column Width	From the drop down list, select a column width.
Text Justification	- Select **Left** to left align the column content. - Select **Center** to center align the column content. - Select **Right** to right align the column content.
Effects	- Select **Gray Shading** to color the column background gray. - Select **Bold** Text to bold the column text. - Select **Italic** Text to italicize the column text.
Border	- Select **Top** to use a top border for all the cells in the column. - Select **Left** to use a left border for the entire column. - Select **Right** to use a right border for the entire column. - Select **Bottom** to use a bottom border for the column (the last cell).
Free Text Properties	- Select the **Default Lines Per Row** check box to use the SORTMASTER default for the number of lines that can be included in a row. - If you do not select the check box, you can enter the **Max Lines Per Row** . The rest of the text will be truncated.
Color	Select to open the Color window and select a color for the column text.

3.   The appearance of the column changes as you select options.

4.   When you are satisfied with the column appearance, select Close.

To Create As Of Reports

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std. Reports Designers.
   The Std Reports Designers menu opens.

3. From the Std Reports Designers menu, choose SM Designer.
   The Report Designer opens.

4. Select the Add New button [icon].
   The Report Designer opens.

5. On the Report Fields tab, select the As Of check box.
6. In the As Of field, enter the as of date for the report.
7. In the Report Type tab, select the Summary option.
8. Complete the fields on the Report Fields tab , as shown below.

7.

Starting Table	From the drop down list select the table to use as the primary table for your report.
	CSC recommends that you select either the Claims table, or the Events table for all reports.
Report Type (this option is not available for Summary Financial reports)	
Detail	Select to display a line-by-line detail of the event or claim data in your report. A detailed report is most useful when you want to see each transaction or record. Use this option primarily with non-financial data.
Summary	Select to display a summary of the data you included in the report.
	You must set a property for every field or use a break between every field you select.
Both	Select to create a detailed report and also display summary information at the end of the report.
	For example, select this option when you sort information by department and want to see the data recapped in summary for each of the subtotals.
Current Level	Displays the currently selected table . Fields from this table are displayed below.
Fields	Select a field (with a window icon [icon]) you want to include in your report and then select the Add button. To open a table (with a folder icon [icon]), double-click the table.
	You must select at least one field from the starting table before you can open a sub-table and select a field.
Down Level	Select a table (folder) and then select this button to display the fields in the selected table.
Up Level	Select to close the table you have opened and display the fields in the parent table.

      Add   Select a field and then select this button to include the field in the report.

      Del   Select a field from the list of fields included in the report and then select this button to remove the field from the report.

> To delete the first field from the Starting Table, you must first delete all the fields below it.

      Report Columns

- Select **Up** to move the selected field up in the list of selected fields.

- Select **Down** to move the selected field down in the list of selected fields.

- Select **Properties** to open the Report Column Properties window and edit properties for the selected field.

8.
9.   Select and complete the fields on the Report Criteria tab , as shown below.
9.

      Column   From the drop down list, select the field for which you are setting criteria.

      Parameter   Select the check box, if you are creating a run-only report and you want to enter a prompt for the run-only report.

      Prompt Label for this Parameter   Enter a prompt that will display when you try to run a run-only report.

      Criteria   Displays the criteria that you have applied parameters to.

      Global Criteria   Displays the parameter statement for the global criteria you set.

      Set Global Criteria   Select to open the Global Criteria window, and set criteria at the claim level and not just the field level. For example, if you set global criteria on a reserve field, the criteria applies to all reserve categories for that claim.

> This button is only available for financial fields with sum selected on the Report Column Properties window.

      Report Criteria   Displays the parameter statement you created.

                           The parameter statement uses SQL statement nomenclature to describe the range, value, or code criteria you set for the selected field.

      Add Criteria   Select to open the Select Criteria Field window. In the Select Criteria Field window:

- From the Field drop down list, select a field.

- Select **Value** to set a value criteria.

- Select **Range** to assign a range.

- Select **Code** to assign code criteria.

- Select **OK** to open the Criteria window .

Toggle AND/OR	This option is only available for single-query reports.
DISTINCT Rows	Select the button to display only unique rows in a report.
Edit Criteria	Select a criteria from the Criteria field and then select this button to open the Criteria window and edit the selected criteria.
Delete Criteria	Select a criteria from the Criteria field and then select this button to delete the selected criteria.
Undo Add	Select to delete the last criteria you added.

10.

11.   Select and complete the fields in the Report Options tab , as shown below.

11.

Report Title	Enter a descriptive title for the report. If you want to enter a second title line or a subtitle, enter it in the next field.
Left/Center/Right	Select either the Left, Center, or Right option to set the title alignment.
Title Font	Select to open the Font window. In the Font window, select the font, font size, color and other attributes for the title, then select OK.
HTML	Select to open the HTML Options window . In the HTML Options window, set options for the report in HTML format, if you export the report in HTML format.
Headers & Footers	Select to open the Headers & Footers window, and enter the header and footer information that you want printed on each window of the report. Enter header and footer codes on this window to automatically include system information.
Report Font	Select to open the Font window. In the Font window, select the font, style, size, and script for the report text, then select OK.
Print Row Number	Select the check box to number each row in the report.
Column Properties	From the drop down list, select the column for which you want to define the appearance.

Column Heading	If you want to overwrite the existing column heading, enter a new column heading.
Width	From the drop down list select a width for the selected column.
Left/Center/Right	Select either the Left, Center, or Right option to set the alignment for the column text.
Effects	• Select **Gray Shading** , to color the column background grey. • Select **Bold Text** to bold the column text. • Select **Italic Text** to italicize the column text.
Border	Select where you want column borders to display.
Agg. Prefix	Select to open the Prefix for Aggregate Rows window, and rename the prefix that displays on the aggregate line of the report. This option is only available if you selected Aggregate on the column properties window.
Color	Select to open the Color palette and assign a color to the column text.

12.

13.   Select a complete the fields in the Graph Options tab , as shown below.

13.

Graph Type	From the drop down list select the type of graph you want to create.
Graph Style	From the drop down list select the style option you want to use for your graph.
Perspective	For 3-dimensional graphs (3d Bar Graph), from the drop down list select the amount of 3-dimensional depth you want for your graph.
Graph Data	Select **Summary** to display summary data in your graph and **Detail** to display detailed data in your graph. Certain types of graphs can only display either summary or detailed information, in which case you will not need to choose.
Colors	• From the **Foreground** drop down list select a color for the title, label, and grid. • From the **Background** drop down list select a color for the graph background. Color selections in the Graph Options tab affect the appearance of the graph display in the Sample window and Graph View mode only, and do not translate color selections to color printers.
Grid	Select the Vertical or Horizontal check boxes to display vertical and horizontal grid lines.

Labels	Select the X-axis or Y-axis check boxes to display labeled X and Y axes.
Graph Title	Enter a title for your graph.
Left Title	Enter a title for the Y-axis.
Bottom Title	Enter a title for the X-axis.

14.

15.   Select the Save and Post button .

The Report saved window opens.

16.   In the Users field, select the users who will be able to access this report.

17.   Select Post.

RISKMASTER saves the report in the Available Reports window. You can run the report from the Available Reports window.

To Define Report Text Colors

1.   Open or create a report.

2.   Select the Report Options tab.

3.   From the Column Properties drop down list, select the column to apply the color to.

4.   Select Color.

The Color window opens.

5.   From the Color grid, click the basic color closest to the one you want to create. If you know the RGB numbers, you can enter those into the Color fields.

6.   In the Color fields, use the up and down arrows to adjust the red, blue and green amounts.

The resulting custom color displays in the Effect box.

7.   After you select the desired color, select OK.

8.   Complete the report.

To Set Up Headers and Footers

You can define the information that prints at the top and bottom of each window of the report.

> Note: Use code &n in the Header or Footer line to print the report name and the directory where the report is stored.

1.   From the main menu, select Reports.

The Reports menu opens.

2.   From the Reports menu, choose Std. Reports Designers.

The Std Reports Designers menu opens.

3.   From the Std Reports Designers menu, choose SM Designer.

The Report Designer opens.

4.   On the Report Options tab, select Headers and Footers.

The Headers and Footers window opens.

5.   In the Header tab, in the Left, Center and Right fields, enter either the header codes or the actual text you want to include in your report header.

6.   In the Footer tab, in the Left, Center and Right fields, enter either the footer codes or the actual text you want to include in your report footer.

7.   Select OK.

8. Complete the report.

To Run a DCC Report

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Other Reports.
   The Other Reports menu opens.

3. From the Other Reports menu, choose DCC Reports.

   The DCC window opens.

4. From the list of reports, select the link for the report you want to run.
   The report opens.

To Schedule Reports

You can set up when and how to run reports in the future. You can set reports up to run at Monthly or Daily intervals.

1. From the main menu, select Reports.
   The Reports menu opens.

2. From the Reports menu, choose Std Reports Queue.

3. From the Std Reports Queue menu, choose Schedule Reports.
   The Schedule Reports window opens and a Schedule Reports window displays under the Utilities node in the left navigation tree.

4. Complete the fields in the Schedule Reports window , as shown below .

Please select schedule type you would like to create	From the drop down list select whether you want the scheduled report to run **Daily** or **Monthly** .
Select Report that you would like to Schedule	From the drop down list select the report to run.
Start Date	Enter the date on which you want to start running reports.
Start Time	Enter the time when you want to start running reports.
	You must enter time in the format xx:xx, with a colon : between the hours and minutes. Time you entered defaults to AM.
Days	Select the days you would like to run reports on.
Report Info	

Report Title	By default, RISKMASTER enters the Report Name for the report you selected. You can rename the report if you want to.
Report Subtitle	Enter an additional subtitle for the report.
Optional Output Name	Enter text you want to include in the report filename for the generated reports. RISKMASTER uses this text along with a unique ID and an extension to name the report file.
Output Type	From the drop down list, select a format for the generated reports.
Notification Type	From the drop down list, select what to include in the notification email that RISKMASTER will automatically generate each time a report is run.
Email to	Enter the email addresses of people you want to send email notification to each time a report is run. To enter multiple email addresses, separate email addresses with semicolons.
Optional Email Message	Enter the message you want to include in the notification email.

5. Select Save.

    A window opens and displays all scheduled reporting activity.

To View Scheduled Reports

1. From the main menu, select Reports.
    The Reports menu opens.

2. From the Reports menu, choose Std Reports Queue.

3. From the Std Reports Queue menu, choose View Scheduled Reports.
    A window opens and displays a list of reports that are scheduled to run on a recurring basis.

4. Select a column name to sort the list.

5. To edit the schedule for a report, select the report name link.

6. To delete one or more scheduled reports, select the check box for the report and select the button.

Derived Fields

Derived Fields Overview

- Derived fields are calculated fields you create in SORTMASTER based on one or more columns in a report. Derived fields are used for advanced computation of financial calculations, if/then/else conditional statements, and advanced data manipulation.

- When you create a derived field, it is added to the list of fields on the Report Fields tab, on the Report Designer. You can set criteria and properties on derived fields, just like you would on any other data fields.

- You use Visual Basic scripting language to create derived fields.

Aggregate Formulas

- Using Aggregate formulas, you can specify the formula to be used when the derived column crosses an aggregate row. Often the aggregate function defined for a particular row will yield an incorrect outcome when it interacts with a derived column. This is because it overrides the derived formula by default. In order to maintain an accurate report, you may change the formula used in the problem area.

Note: This window is enabled only if you select the Separate Formula option. Inserting a formula in this window follows the same procedures used for the Detail Formula window. The only exception is that the formula may not contain a reference to the PreviousValue function.

To Create Derived Fields

Once you open a report, you can create custom columns by combining the values of one or more fields.

Note: To create derived fields you must know how to program macros.

1. Open or create a report.

2. From the Report Designer, select the Derived Fields button [=f(x)] .
   The Derived Fields window opens.

3. In the Derived Field field, enter a name for the field.

Note: Do not include any spaces in the field name.

4. Select Add.
   The Add/Edit Derived Fields window opens.

5. From the Datatype drop down list, select the type of field you want to create.
6. In the Width field, enter the column width.

Note: You can only specify the column width if you selected Text as the Datatype. If the width of the column text in the report is greater than the width you specified, SORTMASTER truncates the text to fit in the predefined width.

7. From the Functions/Operators drop down list, select the function or operator you want to use.
8. From the list of Functions/Operators, double click the first field that you want to use.
   SORTMASTER moves the field to the Detail Formula tab.

9. From the Function/Operators drop down list, select other types of operators you want to use.
   SORTMASTER moves the selected field to the Detail Formula tab.

10. In the Detail Formula tab, use the fields to create formulas for the derived field.
11. Complete the Advanced Aggregate tab if you want to create aggregate formulas.
12. Select Done.

Graphs

Graphs Overview

After you set up a report, you can create a graph from the report data. SORTMASTER uses the first column with a break as the X-axis. The first aggregate value field is the Y-axis.

SORTMASTER uses the data in the first report column with a Break or window property to label the graph and uses the numeric data from the first report column with an aggregate property (Count, Unique Count, Sum, Avg, Min, Max) to generate the graph.

If the label column has duplicate entries, the numeric data is appropriately combined so that each pie slice, line, or bar has a distinct label. The labels display in a legend next to the graph.

You can create a graph from any report containing a comparison of numeric data. You can select from several styles of graphs and charts for displaying report data in useful formats.

If SORTMASTER cannot find a label column, sub-label column (for detail reports), or aggregate column, the message, "No Data to Graph" appears in the Graph View window.

About Pie Charts

Pie charts compare the relative size of the parts that make up the whole. For example, you can compare a specific category of claims, such as auto liability claims against all claims. You might also compare the claim activity of one level (department) of your organization to the whole organization.

In SORTMASTER you can create two-dimensional or three-dimensional pie graphs, and you can choose label options like standard labels, colored labels, or percentage labels with or without caption lines.

About Bar Graphs and Gantt Charts

Bar graphs show the relative value or size of several similar items, such as a distinct quantity class as compared to a standard performance value; either a quota or zero. Bar graphs best compare competitive relationships, which emphasize both positive and negative relationships.

You can stack or unstack data in bar graphs. Stacked bar graphs represent the detail data of your report, while unstacked bar graphs represent the summary data. You can also select from either two- or three-dimensional bar graph displays. Two- and three-dimensional graph styles include vertical or horizontal bars in a linear, stacked, or stacked percentage format. Three-dimensional graphs can also be shown as Z-Cluster displays, which organize the data categories parallel to the z-axis.

Gantt charts are a special type of bar chart that displays graph data horizontally, but does not plot the first partition on the bar. Instead, the first partition is used as the offset for the start of the second partition. Gantt charts can be displayed as adjacent or spaced. Adjacent charts display the graph bars adjoining or touching, without spaces between the values. Spaced charts display the graph bars with spaces between the values.

For stacked and Z-Cluster graphs (detail data) SORTMASTER uses the first sorted column after the label column to determine the bar partitions (the sub-label column) and uses the first aggregate column after the sub-label column as the data that is converted to graph. If the sub-label column has duplicate entries, the numeric data is appropriately combined so that each bar partition has a distinct label. The partition labels display in a legend next to the graph.

About Line, Log Linear, Area Graphs

Line graphs illustrate the trends or changes in data over a period of time. In general, line graphs display plots along literal coordinates . Log linear graphs display plots along proportionate coordinates. Area graphs are a special kind of graph where the area under each line is shaded. Line, log linear, and area graphs show either detail or summary data based on the option you select.

For line and log linear graphs, you can select graph styles from either lines, symbols, sticks, or any combination of these to plot report data on the graph. Lines extend from the y-axis and plot the data horizontally against the x-axis. Symbols plot the points of intersection of the y-axis and the x-axis. Markers extend from the x-axis and plot the data vertically against the y-axis.

For area graphs, you can select graph styles from stack, absolute, or percentage. A stack style plots the literal points and shades the area under the lines. An absolute style plots the points using the same baseline producing an overlap affect. A percentage style plots the points and represents the data as a percentage of the entire area.

For detail graphs SORTMASTER uses the first sorted column (the sub-label column) after the label column to determine the individual lines, and uses the first aggregate column after the sub-label column as the data to graph. If the sub-label column has duplicate entries, the numeric data is appropriately combined so that each line has a distinct label. The lines display in a legend next to the graph.

To Create a Graph

1. Open or [create a report](#).

2. Select the Graph Options tab.
3. From the Graph Type drop down list, select the type of graph you want to use.
4. From the Graph Style drop down list, determine how you want the data to display. This varies with the graph type that you select.
5. From the Graph Data tab, select either Detail or Summary, based on the type of data you want to include in your graph.

Note: Depending on the graph type you select, these options may be disabled.

6. Select the Vertical and Horizontal check boxes, to display vertical and horizontal grid lines respectively.

7. Select the X axis and Y axis check boxes, to display the X axis and Y axis labels respectively.

8. From the Foreground drop down list, select a color for the graph background.

9. From the Background drop down list, select a color for the title, label, and grid.

10. In the Graph Title field, enter a title for your graph.

11. In the Left Title field, enter a label for the Y axis data.

12. In the Bottom Title text box, enter a label for the X axis data.

    When you save and post the report, and then run it from the Available Reports window, the graph is included in the report.

Glossary

A

Auto Diary: A tool that enables you to choose a pre-designed task option for frequently used claim types, and to automatically assign common tasks.

C

Claimant: someone who makes an official request for money from a government, insurance company etc

D

Diaries: Diary enables users to create reminders, and to assign, track and prioritize tasks.

Diary Calendar: Filter the diaries to include in the calendar. Print a calendar with diaries marked on it

Diary Routing: A quick and easy method of sending or assigning a diary task to another user.

Documents List: Contains the list of the document created by the user. It may be in any format: PDF, DOC, Picture file, etc.

DSN: Data Source Number

E

Enhanced Notes: Enhanced notes enable you to govern data handling and manage tasks related to claims and events.

L

LOB: Line of Business for a claim or claim policy.

P

Parent Diary Record: Provides parent claim record for selected diary.

Payment Tab: It lists all payments which are on hold for approval.

Q

Quick Diary: It enables easy retrieval of a claim record.

R

Referenced Diary: it is a readily accessible and organized list of diary tasks.

Reserve Tab: It lists all reserves which are on hold for approval.

RISKMASTER UX: It display rmA system information in an informative & precise chart format.

S

Supervisory Approval UX: It is the integration of two previously existed functions 'Reserve Approval' and 'Approve Transaction'.

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