



LUBA Connect

Policyholder User Guide

Table of Contents

Getting Started 3

 Accessing the LUBA Connect Portal 3

Profile 5

 Change Password..... 5

 Personal Details 6

 Contact Details..... 7

 Preferences 7

Dashboard 8

 Notifications Banner 8

 Overview Tab 8

 Explore Tab 9

 Policies 9

 Details Section..... 10

 Customer Overview Section..... 10

 Owners & Officers Section..... 12

 Billing Information Section 14

 Policy Period Section..... 17

 Claims 19

 Cancellations 32

 Claims Section..... 33

 Unsubmitted Claims Section 37

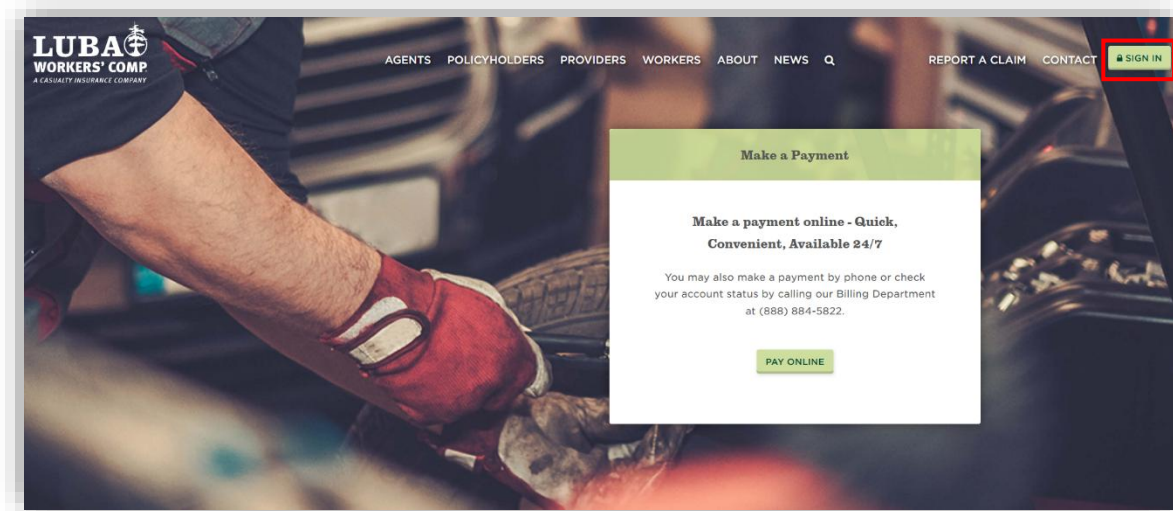
Reports..... 39

Resource Center 41

Getting Started

Accessing the LUBA Connect Portal

To access LUBA Connect, open your web browser and enter the URL: [https://lubawc.com]. On the homepage, you will find the *Sign In* button prominently displayed on the top right of the page.



After selecting “Sign In” to LUBA Connect, the following screen will appear. Select the profile (e.g., Agent, Provider, or Policyholder) which you would like to log in as. Select the *Sign In* button and enter your credentials.

Please note, the *Sign In* button is reserved for Policyholders who have previously registered with the LUBA Connect portal. If this is your first time accessing LUBA Connect, please refer to the steps mentioned below.



Upon selecting your profile, the sign in screen will appear. Please sign in to your account using your registered email and password. If you cannot remember your password, you may select “Forgot Password?”

LUBA
WORKERS' COMP

Sign in to your account

Email

Password

[Forgot Password?](#)

Sign In

The following screen will appear prompting you to enter your email. Select the button labeled "Reset Password" and instructions will be sent.

Forgot Password?

Email

Reset Password →

Or

← Back to Login

If this is your first time on the LUBA Connect portal, select the *Register* button and complete the required registration information shown below. Policyholders must be registered before accessing LUBA Connect.

Employer Registration Request

Employer Name * State for Employer FIC *

Policy Number (if you have it)

Employer Address Line 1 Employer Address Line 2

Zip City State

User First Name * User Middle Initial User Last Name *

Email Address * Primary Phone Number *

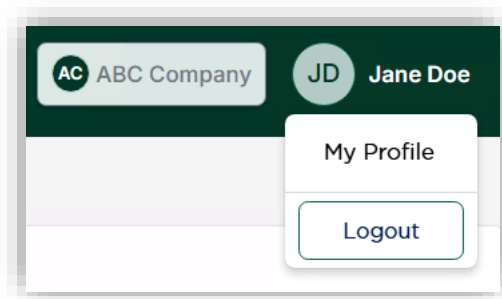
Admin User ☐

Cancel Submit

Once you have completed the registration, select the Submit button. Your registration information will be directed to LUBA, who will review your request. **Please note, it can take up to 2-3 business days for registration requests to be approved.** If there are any issues with your request, LUBA personnel will reach out to you directly.

Profile

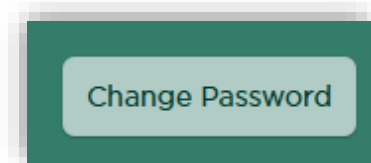
Navigate to the **Profile Section** on the top right of the screen to manage your account settings and personal information.



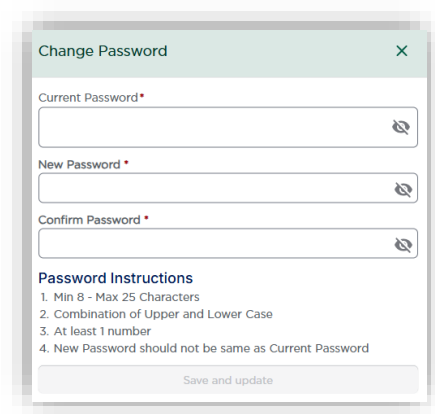
Change Password

To change your password, follow these steps:

1. Navigate to the Profile Section: Select "Profile" from the main menu.
2. Select *Change Password*. Locate the Change Password option within the Profile settings.



3. Enter your current password in the first field.
4. Type your new password in the next field. Ensure it meets the required criteria, which may include a combination of uppercase letters, lowercase letters, numbers, and special characters.
5. Re-enter your new password in the **Confirm Password** box to verify.
6. Select "Save and Update" to apply the changes. A confirmation message will appear indicating that your password has been successfully updated.



Change Password [X]

Current Password *

New Password *

Confirm Password *

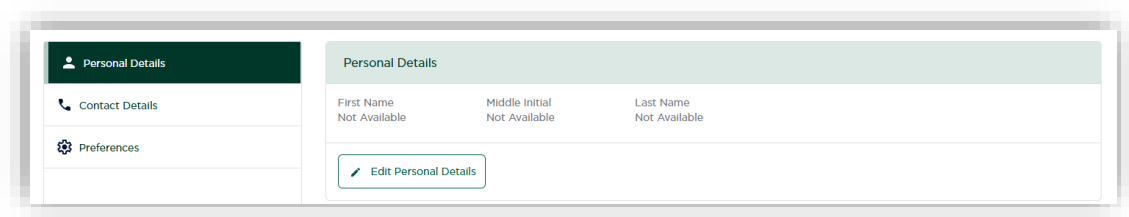
Password Instructions

1. Min 8 - Max 25 Characters
2. Combination of Upper and Lower Case
3. At least 1 number
4. New Password should not be same as Current Password

Save and update

Personal Details

The **Personal Details Section** allows you to view and edit your Personal Details.



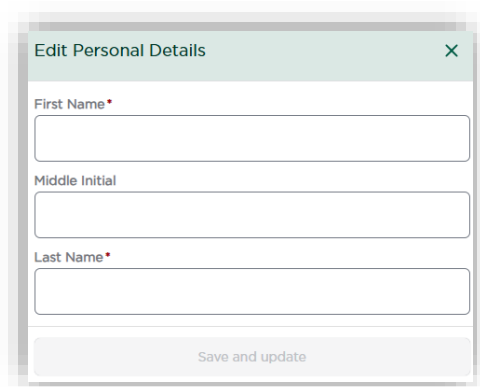
Personal Details

First Name Not Available	Middle Initial Not Available	Last Name Not Available
-----------------------------	---------------------------------	----------------------------

[Edit Personal Details](#)

To edit your Personal Details, follow the steps below:

1. Select the *"Edit Personal Details"* option.
2. Modify any of the following fields as necessary:
 - First Name
 - Middle Initial (optional)
 - Last Name
3. After making the necessary updates, select *"Save"* to ensure your new details are recorded.



Edit Personal Details [X]

First Name *

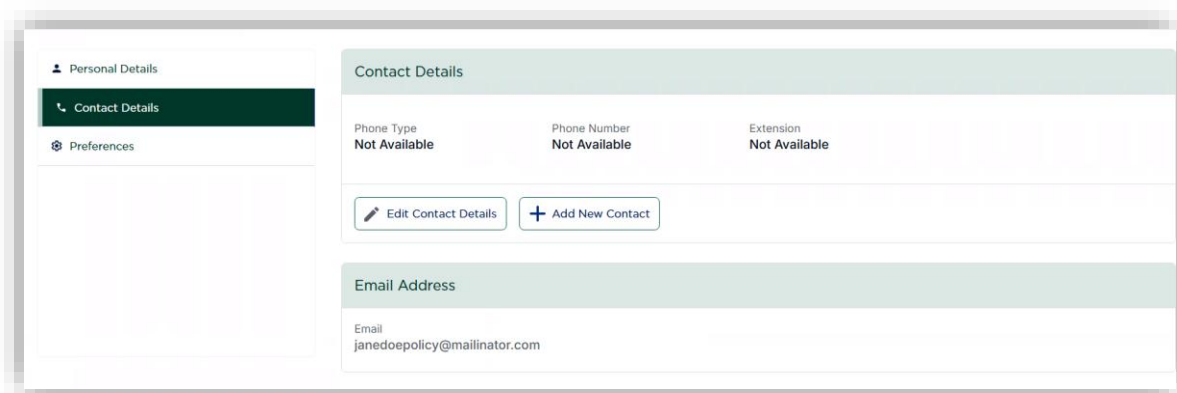
Middle Initial

Last Name *

Save and update

Contact Details

The **Contact Details Section** allows you to view, edit, add or update existing contacts.



The screenshot shows a user profile menu on the left with three options: 'Personal Details', 'Contact Details' (which is highlighted with a dark green background), and 'Preferences'. The main content area is titled 'Contact Details' and contains a table with three columns: 'Phone Type', 'Phone Number', and 'Extension'. All three columns have the value 'Not Available'. Below the table are two buttons: 'Edit Contact Details' (with a pencil icon) and '+ Add New Contact' (with a plus icon). Below the buttons is a section titled 'Email Address' which contains a single row with the label 'Email' and the value 'janedoe@policy@mailinator.com'.

Edit Contact Details: Select the *Edit Contact Details* option.

Add New Contact:

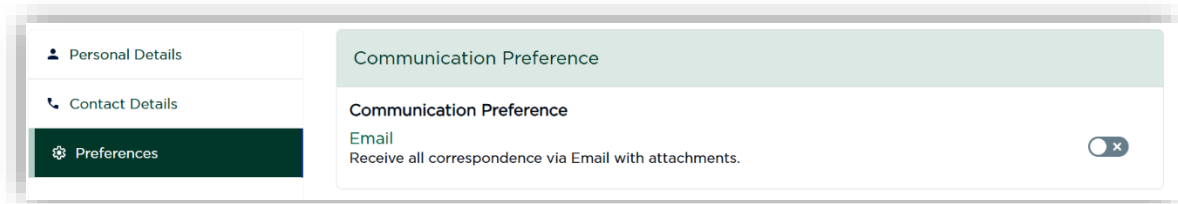
1. Select *More* and then the *Add New Contact* button.
2. Fill in the required fields such as Name, Email, Phone Number, and Role.
3. Select "Submit" to add the new contact.

Update Existing Contacts (Edit Contact Details):

1. Locate the contact you wish to update.
2. Select the *Update Contact* button next to the relevant contact.
3. Make necessary changes and select "Save and Update" to apply modifications.

Preferences

The **Preferences Section** allows you to set your communication preference settings.



The screenshot shows a user profile menu on the left with three options: 'Personal Details', 'Contact Details', and 'Preferences' (which is highlighted with a dark green background). The main content area is titled 'Communication Preference' and contains a section titled 'Communication Preference' with the label 'Email' and the text 'Receive all correspondence via Email with attachments.' To the right of this text is a toggle switch that is currently turned on, indicated by a blue circle and a checkmark icon.

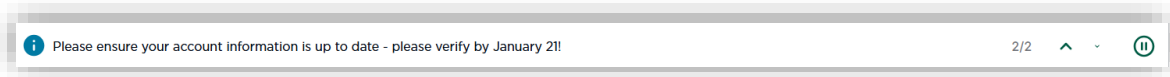
Follow the steps below to set your notification preferences:

1. **Access Preferences:** Select "Preferences" in the Profile menu.
2. **Communication Preference:** Toggle the option to manage alerts and notifications related to your account activities.
 - You may choose to receive email notifications for various updates such as Policy Changes, Claims Status, and Payment Reminders
3. **Save Preferences:** After adjusting your preferences, ensure you select "Save" to confirm changes.

Dashboard

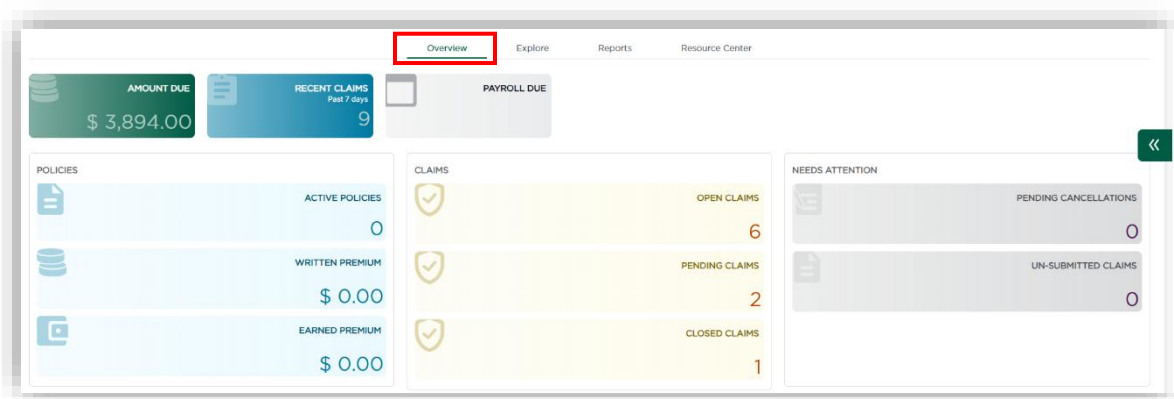
Notifications Banner

The **Notifications Banner** is located at the top of the dashboard screen and displays urgent notifications, updates, and alerts. For example, notifications regarding Policy changes or upcoming deadlines will be highlighted.



Overview Tab

The **Overview Tab** provides a snapshot of policyholder information, including Amounts Due, Recent Claims, and Payroll Due.



The **Overview Tab** displays three main categories: **Policies**, **Claims**, and **Needs Attention**.

Policies

- **Active Policies** displays the number of currently active Policies
- **Written Premium** displays the total premiums written for the Policies
- **Earned Premium** displays premiums earned during the Policy period

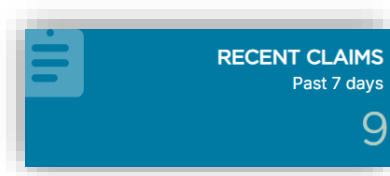
Claims

- Select **Open Claims** to view Claims that are currently active
- Select **Pending Claims** to view Claims awaiting resolution
- Select **Closed Claims** to view Claims that have been fully processed

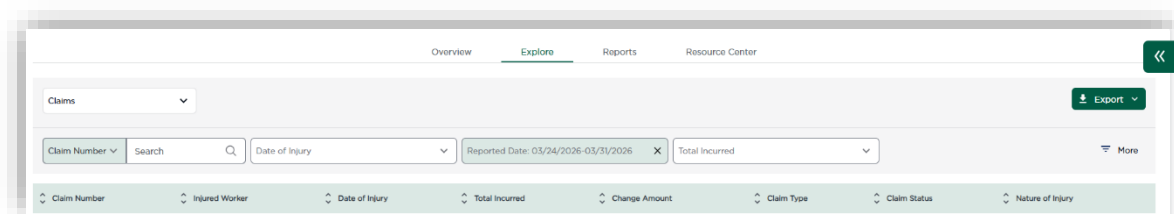
Needs Attention

- Select **Pending Cancellations** to view Policies that are pending cancellation
- Select **Unsubmitted Claims** to view Claims that have not yet been submitted

Recent Claims displays the number of Claims reported in the last seven days.

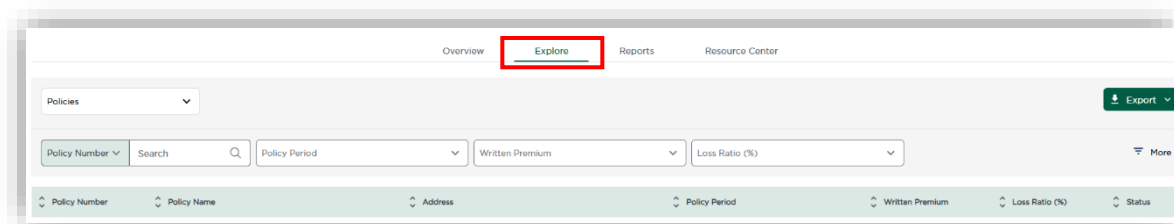


Selecting this box will direct you to the Claims Screen and filter by those Claims within the date range of seven days.



Explore Tab

The **Explore Tab** on the Dashboard allows a detailed look at your information. Users can filter and search for data within the following categories: **Policies**, **Cancellations**, **Claims**, and **Unsubmitted Claims**. Refer to the individual sections below for instructions on navigating each.



Policies

Utilize the drop-down menu to select "Policies" to view the Policy Section.



The **Policies Section** provides detailed information regarding each Policy with which your LUBA Connect account is associated with. To view specific Policy details, select the hyperlink located under the Policy Number column.

Overview Explore Reports Resource Center						
Policies Export						
Policy Number	Search	Policy Period	Written Premium	Loss Ratio (%)	More	
Policy Number	Policy Name	Address	Policy Period	Written Premium	Loss Ratio (%)	Status
LUC400010	ABC Company	123 Main St, Baton Rouge LA, 70810	04/01/2026 - 04/01/2027	\$ 78,812.00	5.87%	Active

Details Section

Once the Policy Number hyperlink has been selected, you will be directed to the **Details Section**. The Summary Header, located at the top of the Details Section, provides a quick glance of Policy information. The Summary Header also allows you to make a payment directly. Select “Make Payment” to proceed with this step. You may also File First Report of Injury.

ABC Company

Current Account Balance: \$117M

Policy Number LUC400010	Policy Period 04/01/2026 - 04/01/2027	Policy Status Active	Billing Plan Monthly	Policy Period Balance \$ 200.00	Written Premium \$ 78,812.00
Earned Premium \$ 15,331.00	Incurred Losses \$ 0.00	Loss Ratio 0.00%			

File First Report of Injury

Make Payment

Customer Overview Section

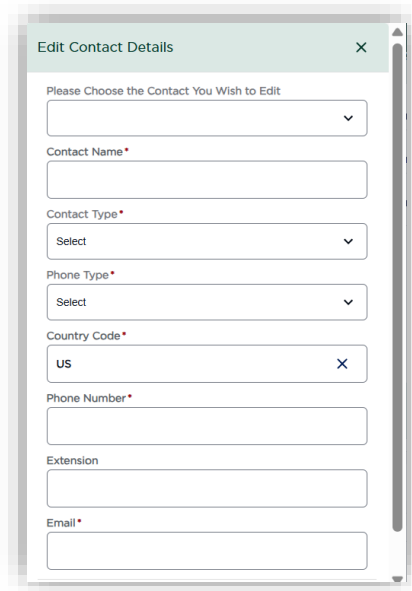
The **Customer Overview Section** shows a brief summary of customer information.

Details	Customer Overview	Officers & Owners	Billing Information	Policy Period
ABC Company Please contact your Agent if business information update is needed.				
Primary DBA Name	ABC Company			
Address	123 Main St, Baton Rouge LA, 70810			
FEIN	XXX-XX-5191			
Email Address	jdoeluba@mailinator.com			
Business Phone Extension	Not Available			
Business Phone Number	Not Available			
Cell Phone Extension	Not Available			
Cell Phone Number	Not Available			

The following Information is included within section:

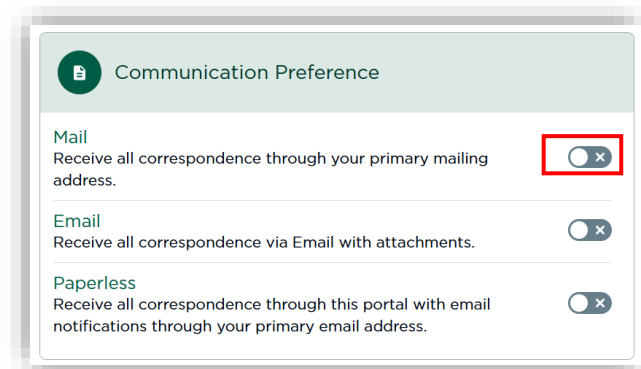
- Primary DBA Name
- Address
- FEIN
- Email Address

- Business Phone Extension
- Business Phone Number
- Cell Phone Extension
- Cell Phone Number
- Update
 - To update any of the above information, select “Update Contact”. A pop-up window will display allowing you to enter new information. Select “Save and Update” to complete your update.



The image shows a mobile application screen titled "Edit Contact Details" with a close button (X) in the top right corner. Below the title is a dropdown menu labeled "Please Choose the Contact You Wish to Edit". The form contains several input fields: "Contact Name" (required), "Contact Type" (dropdown menu with "Select" as the current value), "Phone Type" (dropdown menu with "Select" as the current value), "Country Code" (input field with "US" and a clear button (X)), "Phone Number" (required), "Extension", and "Email" (required). Each field has a red asterisk indicating it is a required field.

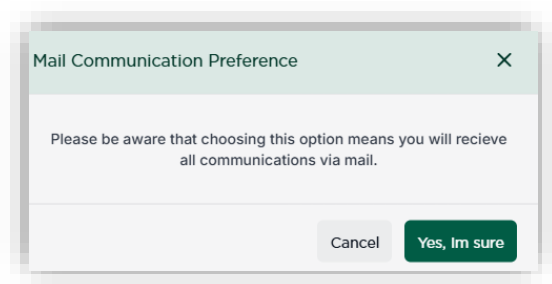
- Communication Preference
 - To edit your current **Communication Preferences**, toggle the buttons ON or OFF



The image shows a mobile application screen titled "Communication Preference" with a document icon in the top left corner. The screen lists three preferences, each with a description and a toggle switch with a clear button (X):

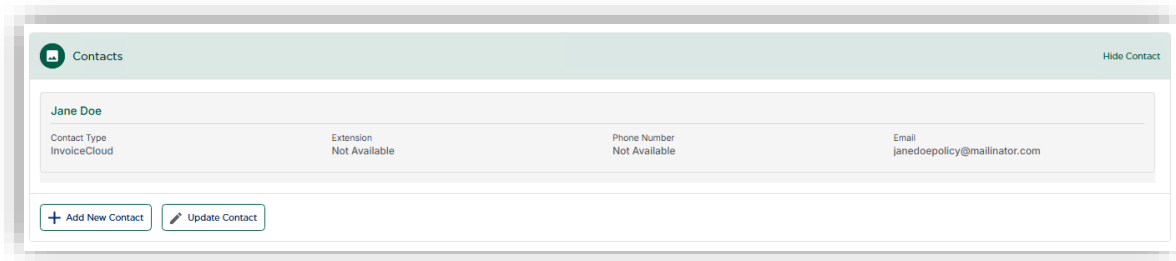
- Mail**: Receive all correspondence through your primary mailing address. The toggle switch is currently ON (indicated by a red box around it).
- Email**: Receive all correspondence via Email with attachments. The toggle switch is currently OFF.
- Paperless**: Receive all correspondence through this portal with email notifications through your primary email address. The toggle switch is currently OFF.

Once a button has been toggled, a pop-up window will appear notifying you of the change in your Communication Preference. You may select “Cancel” to return to the previous screen, or select “Yes, I’m sure” to accept the change.



➤ Contacts

- Allows you to view current **Contacts**, add a new contact or update a contact



If you wish to enter a new contact, select the *Add New Contact* button. A pop-up window will appear. Please complete the fields and select *Submit*.

A "Add New Contact" form with a close button (X) in the top right corner. The form contains the following fields: "Contact Name*" (text input), "Contact Type*" (dropdown menu with "Select" option), "Phone Type*" (dropdown menu with "Select" option), "Country Code*" (text input), "Phone Number*" (text input), "Extension*" (text input), and "Email*" (text input). A "Submit" button is located at the bottom of the form.

Owners & Officers Section

The **Owners and Officers Section** displays the Names, Titles, Coverage, and Coverage Period. You may utilize the filter option to filter by Ownership Percentage Rates. Note: the Ownership Percentage filter can be located under the "More" button.

ABC Company
Current Account Balance: \$117M

Policy Number: LUC400010 | Policy Period: 04/01/2026 - 04/01/2027 | Policy Status: Active | Billing Plan: Monthly | Policy Period Balance: \$ 200.00 | Written Premium: \$ 78,812.00

Earned Premium: \$ 15,331.00 | Incurred Losses: \$ 0.00 | Loss Ratio: 0.00%

File First Report of Injury | Make Payment

Details | Customer Overview | **Officers & Owners** | Billing Information | Policy Period | Claims | Documents | Notes | Payroll Reports

Export

Name Search Coverage Period Coverage Title More

This section also enables you to search for specific Owners or Officers by Name or Title. Enter the Name or Title in the search bar provided to display results.

Name Search

Name

Title

Coverage Period

- To filter by **Coverage Period**, utilize the drop-down menu provided
- Select from the following options: Last 30 days, Last 60 days, or a Custom Date Range
- Provide specific calendar dates in the From/To boxes provided to enter a Custom Date Range

Coverage Period

☐ Last 30 days

☐ Last 60 days

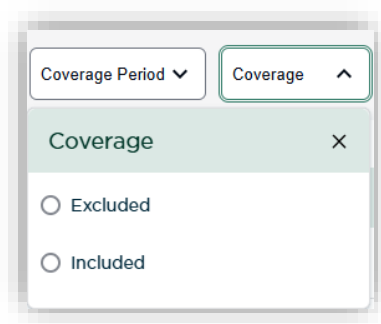
☒ Custom Date Range

From To

10/06/2025 | MM/DD/YYYY

Coverage

- To filter by Ownership/Officer Policy **Coverage**, utilize the drop-down menu provided
- Select from the following options: Excluded or Included



Coverage Period ▾ Coverage ▲

Coverage ×

☐ Excluded

☐ Included

Title

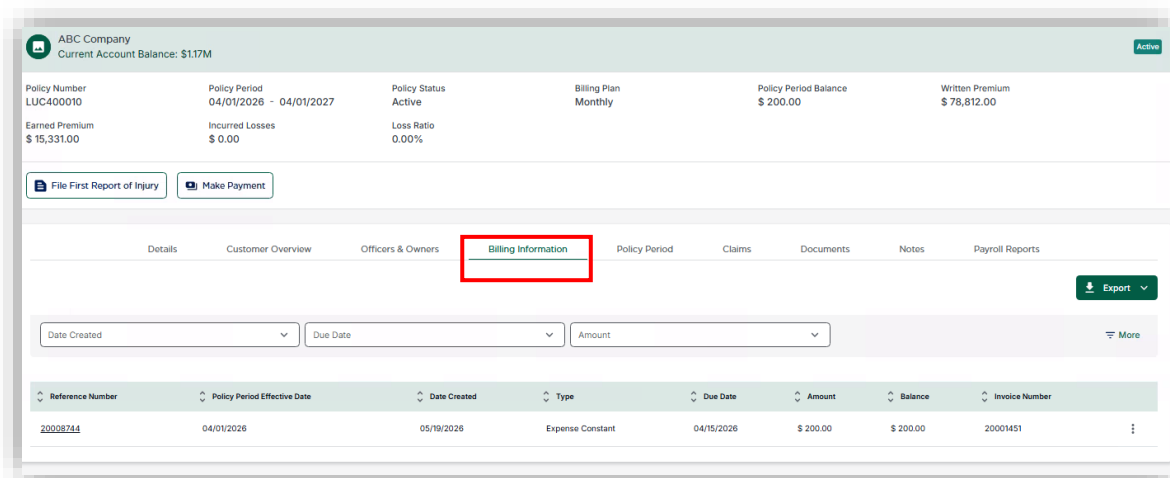
- To filter by **Title**, utilize the drop-down menu provided
- Select from the Title options shown

Ownership Percentage Range

- To filter by *Ownership Percentage Rate*, utilize the drop-down menu provided located under the “More” button
- **Ownership Percentage Range:** Enter a numerical value both the From and To boxes provided
- **Exact Percentage:** Enter an exact value in the field provided

Billing Information Section

The **Billing Information Section** allows you to navigate through all billing-related details, where you can filter by Date Created, Due Date, Amount, and Type. Additional filters noted may be accessed by selecting the “More” button.



ABC Company
Current Account Balance: \$117M Active

Policy Number LUC400010	Policy Period 04/01/2026 - 04/01/2027	Policy Status Active	Billing Plan Monthly	Policy Period Balance \$ 200.00	Written Premium \$ 78,812.00
Earned Premium \$ 15,331.00	Incurred Losses \$ 0.00	Loss Ratio 0.00%			

[File First Report of Injury](#) [Make Payment](#)

Details Customer Overview Officers & Owners **Billing Information** Policy Period Claims Documents Notes Payroll Reports

[Export](#)

Date Created ▾ Due Date ▾ Amount ▾ [More](#)

Reference Number	Policy Period Effective Date	Date Created	Type	Due Date	Amount	Balance	Invoice Number
20008744	04/01/2026	05/19/2026	Expense Constant	04/15/2026	\$ 200.00	\$ 200.00	20001451

This section displays the Reference Number, Policy Period Effective Date, Date Created, Type, Due Date, Amount, Balance, and Invoice Number.

Filter bar with dropdowns for Date Created, Due Date, and Amount. Below is a table header with columns: Reference Number, Policy Period Effective Date, Date Created, Type, Due Date, Amount, Balance, and Invoice Number.

Date Created

- To filter by *Date Created*, utilize the drop-down menu provided
- Select from the following options: Last Month, Last 3 Months, Last 6 Months, Last 1 Year, or by entering a Custom Date Range
- To filter by a Custom Date Range, enter From/To Dates in the boxes provided

Date Created filter dropdown menu. Options: Last Month, Last 3 Months, Last 6 Months, Last 1 Year, Custom Date Range (selected). Below are input fields for From and To dates, with a date picker icon.

Due Date

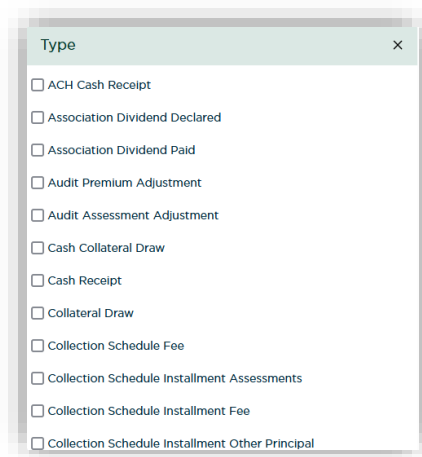
- To filter by *Due Date*, utilize the drop-down menu provided
- Select from the following options: Last Month, Last 3 Months, Last 6 Months, Last 1 Year, or by entering a Custom Date Range
- **Custom Date Range:** Enter From/To Dates in the boxes provided to filter by a custom date range

Amount

- To filter by an *Amount*, utilize the drop-down menu provided
- **Amount Range:** Enter numerical values in the From/To boxes provided to filter by amount range
- **Exact Amount:** Enter a specific numerical value to filter by exact amount

Type

- To filter by *Type*, utilize the drop-down menu provided to select one of the following payment options provided



Reference Number

Select the “**Reference Number**” hyperlink to display detailed information.

A screenshot of a data table interface. At the top, there are three filter boxes: 'Date Created', 'Due Date', and 'Amount', each with a dropdown arrow. To the right of these is a 'More' link with a double arrow icon. Below the filters is a table with the following columns: Reference Number, Policy Period Effective Date, Date Created, Type, Due Date, Amount, Balance, and Invoice Number. The first row of data has the following values: 20008744, 04/01/2026, 05/19/2026, Expense Constant, 04/15/2026, \$ 200.00, \$ 200.00, and 20001451. The 'Reference Number' '20008744' is highlighted with a red rectangular box. A vertical ellipsis (three dots) is visible at the end of the first row.

Reference Number	Policy Period Effective Date	Date Created	Type	Due Date	Amount	Balance	Invoice Number
20008744	04/01/2026	05/19/2026	Expense Constant	04/15/2026	\$ 200.00	\$ 200.00	20001451

A pop-up window will appear with the following information:

- Policy Period Effective Date
- Date Created
- Type
- Due Date
- Amount
- Balance
- Group Name
- Group Address
- State
- Invoice Number
- Installment Number
- Reporting Period Effective Date

Reference Number : 43022

Policy Period Effective Date	06/06/2025
Date Created	06/06/2025
Type	Expense Constant
Due Date	06/20/2025
Amount	\$ 200.00
Balance	\$ 0.00
Group Name	Not Available
Group Address	
State	Ja
Invoice Number	127026
Instalment Number	Not Available
Reporting Period Effective Date	

Alternatively, you may also view Billing Period details by selecting the three dots to the right of Invoice Number and selecting the “*View Details*” button. The same pop-up window showing Reference Number details depicted above will appear.

Invoice Number

View Details

Policy Period Section

The **Policy Period Section** displays date specific information. This section contains records on Policy Effective/Expiration Date, Written Premium, Earned Premium, Incurred Losses, Loss Ratio, and Policy Period Status.

ABC Company

Current Account Balance: \$1.17M

Active

Policy Number LUC400010	Policy Period 04/01/2026 - 04/01/2027	Policy Status Active	Billing Plan Monthly	Policy Period Balance \$ 200.00	Written Premium \$ 78,812.00
Earned Premium \$ 15,331.00	Incurred Losses \$ 0.00	Loss Ratio 0.00%			

File First Report of Injury

Make Payment

Details

Customer Overview

Officers & Owners

Billing Information

Policy Period

Claims

Documents

Notes

Payroll

Export

Statement Date Range

Loss Ratio

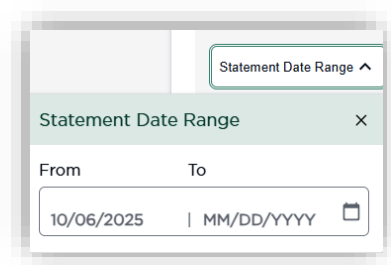
Written Premium

More

Policy Effective/Expiration Date	Written Premium	Earned Premium	Incurred Losses	Loss Ratio	Policy Period Status
04/01/2026 - 04/01/2027	\$ 78,812.00	\$ 15,331.00	\$ 0.00	0.00%	Active

Statement Date Range

- To filter by a *Statement Date Range*, utilize the drop-down menu provided
- Enter specific calendar dates in the From/To fields provided

A screenshot of a software interface showing a filter for 'Statement Date Range'. At the top, there is a button labeled 'Statement Date Range' with an upward arrow. Below it is a modal window titled 'Statement Date Range' with a close button (X). Inside the modal, there are two columns: 'From' and 'To'. The 'From' column has a text input field containing '10/06/2025'. The 'To' column has a text input field containing 'MM/DD/YYYY' and a calendar icon to its right.

Loss Ratio

- To filter by a *Loss Ratio*, utilize the drop-down menu provided
- **Percentage Rate:** Enter values in the From/To fields provided to filter by percentage rate
- **Exact Percentage:** Enter specific numerical value in the field provided to filter by exact percentage

Written Premium

To filter by *Written Premium*, utilize the following options:

- **Amount Range:** Enter a range of written premiums in the From/To boxes to filter reports based on total written premiums
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter reports that match that exact written premium

Earned Premium

To filter by *Earned Premium*, utilize the following options:

- **Amount Range:** Enter a range of earned premiums in the From/To boxes to filter reports based on total earned premiums
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter reports that match that exact earned premium

Incurred Losses

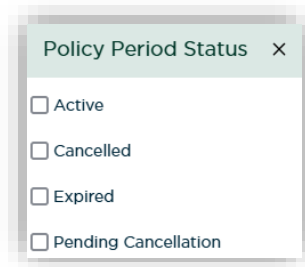
To filter by *Incurred Losses*, utilize the following options:

- **Amount Range:** Enter a range of incurred losses in the From/To boxes to filter reports based on total incurred losses
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter reports that match that exact incurred loss amount

Policy Period Status

To filter by *Policy Period Status*, utilize the following options:

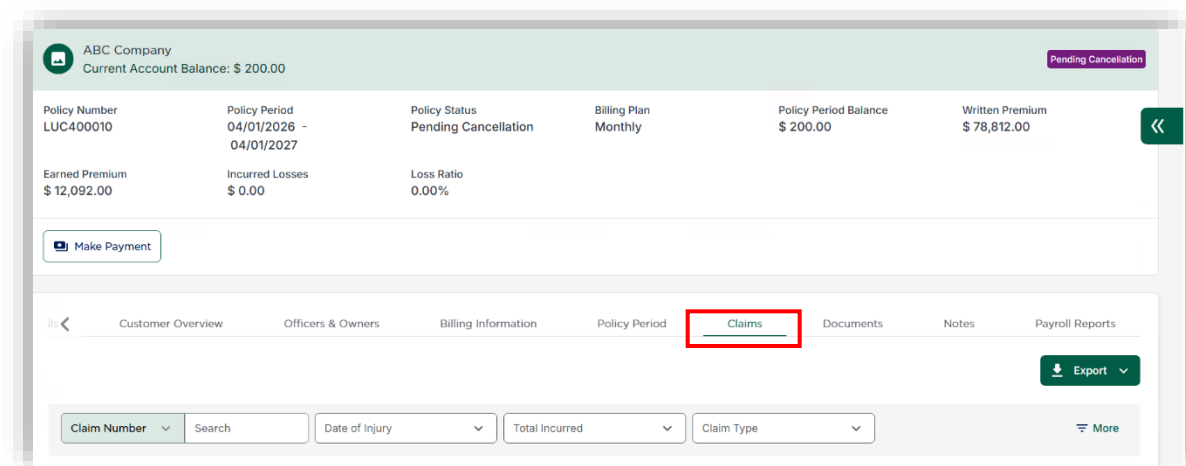
- **Active:** Select this option to filter reports showing only active Policy periods
- **Expired:** Choose this option to filter reports for Policy periods that have expired
- **Pending:** Select this option to filter reports for Policy periods that are currently pending



A dropdown menu titled "Policy Period Status" with a close button (X). It contains four options, each with an unchecked checkbox: "Active", "Cancelled", "Expired", and "Pending Cancellation".

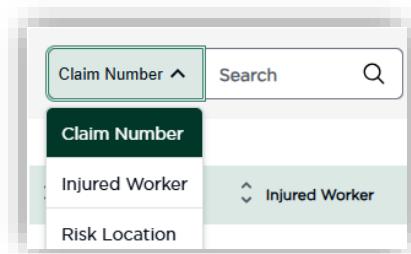
Claims

The **Claims Section** displays information specific to individual claims such as Claim Numbers, Injured Workers, Date of Injury, Total Incurred, Change Amount, Claim Type, Claim Status, or Nature of Injury.



The interface for ABC Company shows a "Pending Cancellation" status. Key information includes Policy Number LUC400010, Policy Period 04/01/2026 - 04/01/2027, Policy Status Pending Cancellation, Billing Plan Monthly, Policy Period Balance \$ 200.00, and Written Premium \$ 78,812.00. Other details include Earned Premium \$ 12,092.00, Incurred Losses \$ 0.00, and Loss Ratio 0.00%. A "Make Payment" button is available. The navigation bar includes links for Customer Overview, Officers & Owners, Billing Information, Policy Period, **Claims** (highlighted with a red box), Documents, Notes, and Payroll Reports. An "Export" button is also present. Below the navigation bar, there are search filters for Claim Number, Date of Injury, Total Incurred, and Claim Type, along with a "More" option.

Utilize the drop-down menu provided to search by *Claim Number*, *Injured Worker*, or *Risk Location*.

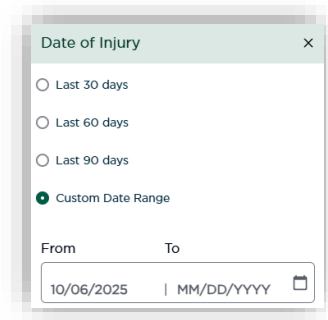


A search filter dropdown menu with a "Claim Number" label and a search input field. The dropdown menu is open, showing three options: "Claim Number", "Injured Worker", and "Risk Location". The "Injured Worker" option is currently selected and highlighted.

Date of Injury

To filter by *Date of Injury*, utilize the following options:

- **Specific Date:** Use the date picker to select a specific date to filter Claims based on that exact date of injury
- **Date Range:** Enter a range of dates in the From/To fields to filter Claims that occurred within that specified date range



The screenshot shows a modal dialog box titled "Date of Injury" with a close button (X) in the top right corner. Inside the dialog, there are four radio button options: "Last 30 days", "Last 60 days", "Last 90 days", and "Custom Date Range". The "Custom Date Range" option is selected, indicated by a green dot. Below these options, there are two input fields labeled "From" and "To". The "From" field contains the date "10/06/2025" and a small calendar icon to its right. The "To" field contains the placeholder text "MM/DD/YYYY" and also has a small calendar icon to its right.

Total Incurred

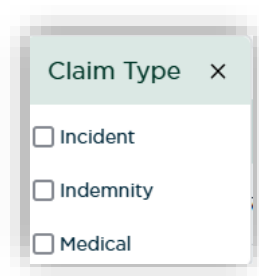
To filter by *Total Incurred*, utilize the following options:

- **Amount Range:** Enter a range of total incurred amounts in the From/To boxes to filter Claims based on financial metrics
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter Claims that match that exact total incurred amount

Claim Type

To filter by *Claim Type*, utilize the following options:

- **Predefined Types:** Select from the drop-down menu of predefined claim types (e.g., Workers' Compensation, Liability) to filter Claims based on their classification

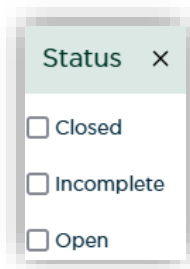


The screenshot shows a modal dialog box titled "Claim Type" with a close button (X) in the top right corner. Inside the dialog, there is a list of three predefined claim types, each preceded by an unchecked checkbox: "Incident", "Indemnity", and "Medical".

Status

To filter by *Status*, utilize the following options:

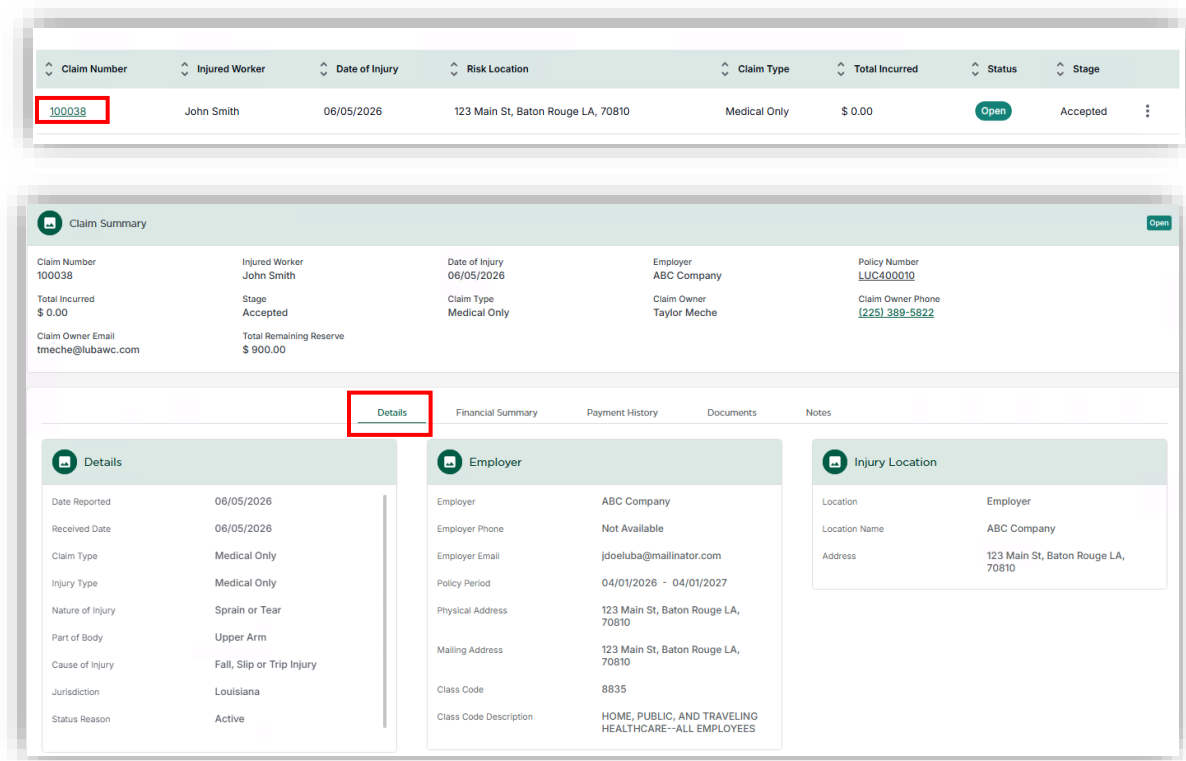
- **Closed:** Choose this option to filter Claims that have been fully processed and closed
- **Incomplete:** Select this option to filter Claims that are awaiting further action or resolution
- **Open:** Select this option to filter Claims that are currently open and under review



Stage

To filter by *Stage*, utilize the following options: **Accepted, Consolidated, Denied, Expired Occurrence, Incident Only, Incomplete Occurrence, Pending, Pending – Conditional Benefits, Pending Coverage, Pending Submission, Submitted.**

To view specific details within a Claim Number, select the numerical hyperlink to be directed to a new screen.



Claim Summary

Input keywords related to the **Claim Summary** in the search bar to filter results based on specific terms found in the summaries.

Claim Summary				
Claim Number 100038	Injured Worker John Smith	Date of Injury 06/05/2026	Employer ABC Company	Policy Number LUC400010
Total Incurred \$ 0.00	Stage Accepted	Claim Type Medical Only	Claim Owner Taylor Meche	Claim Owner Phone (225) 389-5822
Claim Owner Email tmeche@lucawc.com	Total Remaining Reserve \$ 900.00			

Claim Details

The Claim Details Section provides the following information:

- **Date Reported:** Displays the date when Claims were reported
- **Received Date:** Displays the date when Claims were received
- **Injury Type:** Categorizes injury based on specific types of injuries (e.g., Minor, Major)
- **Nature of Injury:** Displays the Nature of Injury based upon specific injury types
- **Part of Body:** Displays parts of body involved per Claim
- **Cause of Injury:** Details of injury based on specific circumstances or causes (e.g., Caught in between, under)
- **Jurisdiction:** Lists the state or Jurisdiction based upon where Claim was filed
- **Status Reason:** Current Status Reason (e.g., Under Review, Awaiting Documentation)
- **Injured Worker Attorney:** Name of the Attorney for the injured worker

Details	
Date Reported	06/05/2026
Received Date	06/05/2026
Claim Type	Medical Only
Injury Type	Medical Only
Nature of Injury	Sprain or Tear
Part of Body	Upper Arm
Cause of Injury	Fall, Slip or Trip Injury
Jurisdiction	Louisiana
Status Reason	Active

Policyholder Details

The Policyholder Details Section provides the following information:

- **Policyholder Name:** Displays the Policyholder's Name
- **Policyholder Phone:** Displays the Policyholder's Phone Number
- **Policyholder Email:** Policyholder's Email
- **Policy Period:** Displays the Policy Period
- **Physical Address:** Policyholder's Physical Address
- **Mailing Address:** Policyholder's Mailing Address
- **Class Code:** Displays the Class Code
- **Class Code Description:** Displays the Class Code Description

 Employer

Employer	ABC Company
Employer Phone	Not Available
Employer Email	jdoeluba@mailinator.com
Policy Period	04/01/2026 - 04/01/2027
Physical Address	123 Main St, Baton Rouge LA, 70810
Mailing Address	123 Main St, Baton Rouge LA, 70810
Class Code	8835
Class Code Description	HOME, PUBLIC, AND TRAVELING HEALTHCARE--ALL EMPLOYEES

Injury Location

The Injury Location Section provides the following information:

- **Location:** Location of injury
- **Location Name:** Name of location where the injury took place
- **Address:** Address where injury took place

 Injury Location

Location	Employer
Location Name	Not Available
Address	Not Available

The **Financial Summary Section** highlights Reserve Description (Indemnity, Medical, Expense) as well as Incurred, Paid, Recovery, and Remaining Reserve.

Payment History

The **Payment History Section** displays history of payments made on a specific claim. Results are based upon the Date Created, Description, Payment Type, Payee, Participation Type, Paid Amount, or Service From – Through.

The following filter options are available within the Payment History Section:

To filter by *Date Created*, utilize the following options:

- **Last Month:** Select this option to filter for payments created in the last month
- **Last 3 Months:** Choose this option to filter for payments created within the last three months
- **Last 6 Months:** Select this option to filter for payments created in the last six months
- **Last Year:** Choose this option to filter for payments created in the past year

- **Custom Date Range:** Enter specific calendar dates in the From/To fields to filter for payments based on a custom date range

Description

To filter by *Description*, utilize the following options:

- **Keywords:** Input keywords related to the payment in the search bar to filter results based on specific terms found in the descriptions (e.g. – ACH Cash Receipt, Annuity Payment, etc.)

Paid Amount

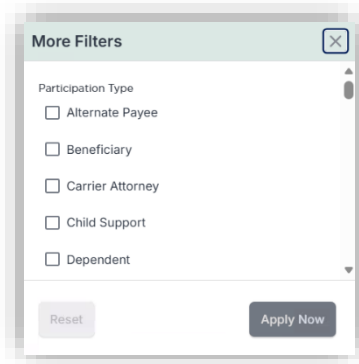
To filter by *Paid Amount*, utilize the following options:

- **Amount Range:** Enter a range of paid amounts in the From/To boxes to filter results based on total amounts paid
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter results that match the exact paid amount

Participation Type

To filter by *Participation Type*, select the “More” button and utilize the following options:

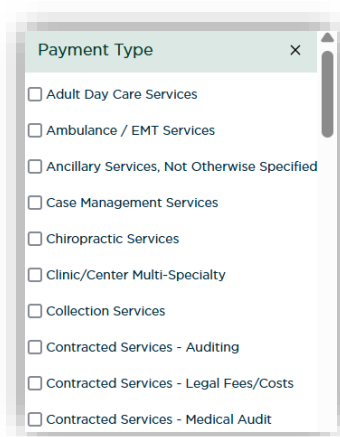
- **Predefined Types:** Select from the drop-down menu of predefined participation types (i.e. alternate payee, beneficiary, or carrier attorney)



Payment Type

To filter by *Payment Type*, select the “More” button and utilize the following options:

- **Predefined Types:** Select from the drop-down menu of predefined payment cost center types (i.e. medical codes, vendor or indemnity type payments)



Documents Section

The **Documents Section** shows a Claim Summary at the top with the corresponding Documents listed underneath. Any documents related to the specified claim will be available for search.

The screenshot shows the 'Claim Summary' page. At the top, there's a header with a 'Claim Summary' title and an 'Open' button. Below this is a table with claim details:

Claim Number 100038	Injured Worker John Smith	Date of Injury 06/05/2026	Employer ABC Company	Policy Number LUC400010
Total Incurred \$ 0.00	Stage Accepted	Claim Type Medical Only	Claim Owner Taylor Meche	Claim Owner Phone (225) 389-5822
Claim Owner Email tmeche@lubawc.com	Total Remaining Reserve \$ 900.00			

Below the table are tabs: Details, Financial Summary, Payment History, **Documents** (highlighted with a red box), and Notes. The 'Documents' tab is active, showing a search bar with 'Search By' and 'Search' fields. Below the search bar, a document titled 'Form IA-1 FROI' is displayed, dated '06/05/2026'. The document content is partially visible, showing 'Workers Compensation - First Report of Injury or Illness'.

Search by Document Name, Reference Number, or Document Created Date:

Locate the search bar at the top of the Documents section. Enter specific keywords related to the Document Name, Reference Number, or the Document Created Date in the input field. This will filter the results to show only those documents that match the entered criteria.

This screenshot shows the search bar from the previous image with the 'Search By' dropdown menu open. The menu lists three options: 'Document Name', 'Reference Number', and 'Document Created Date'. The 'Search' field is empty, and there is a magnifying glass icon to the right of the search bar.

More Filter Options

Select the **“More”** button to access more detailed filtering options. Advanced filtering selections available include: **Document Created Date**, **Category**, and **Document Source**. You may also sort by one of the options mentioned.

This screenshot shows the 'Documents' section with the search bar. The 'Search By' dropdown is open, and the 'More' button (represented by three horizontal lines) is highlighted with a red box. The search bar contains the text 'search' and a magnifying glass icon.

Notes

The **Notes Section** displays notes related to the specified claim.

The screenshot shows the 'Claim Summary' page. At the top, there's a header with a 'Claim Summary' title and an 'Open' button. Below this is a table with claim details:

Claim Number 100038	Injured Worker John Smith	Date of Injury 06/05/2026	Employer ABC Company	Policy Number LUC400010
Total Incurred \$ 0.00	Stage Accepted	Claim Type Medical Only	Claim Owner Taylor Meche	Claim Owner Phone (225) 389-5822
Claim Owner Email tmeche@lubawc.com	Total Remaining Reserve \$ 900.00			

Below the table is a navigation bar with tabs: 'Details', 'Financial Summary', 'Payment History', 'Documents', and 'Notes'. The 'Notes' tab is highlighted with a red box. To the right of the tabs is an 'Export' button with a download icon. At the bottom, there are three filter dropdowns: 'Create Date', 'Note Type', and 'Category'.

Create Date:

To filter by *Create Date*, utilize the following options:

- **Date Picker:** choose from one of the available date range options or enter a custom date range in the From/To field

The screenshot shows the 'Create Date' filter dialog. It has a title bar with 'Create Date' and a close button. Inside, there are three radio button options: 'Last 30 days', 'Last 60 days', and 'Custom Date Range'. The 'Custom Date Range' option is selected. Below these options are two input fields labeled 'From' and 'To'. The 'From' field contains the date '10/06/2025' and a calendar icon. The 'To' field contains the placeholder 'MM/DD/YYYY' and a calendar icon. At the bottom right, there is a 'Create Date' button with an upward arrow.

Note Type:

To filter by *Note Type*, utilize the following options:

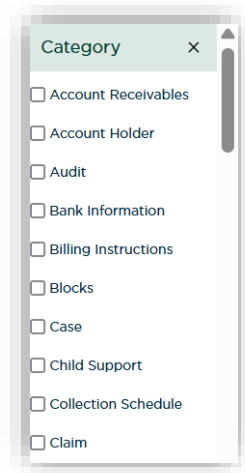
- Select the drop-down menu labeled *Note Type*
- **Select Type:** Choose from predefined note types (e.g., Email, Note, Phone, or SMS) to filter notes according to their classification

The screenshot shows the 'Note Type' filter dialog. It has a title bar with 'Note Type' and a close button. Inside, there are four radio button options: 'Email', 'Note', 'Phone', and 'SMS'. All options are currently unselected.

Category:

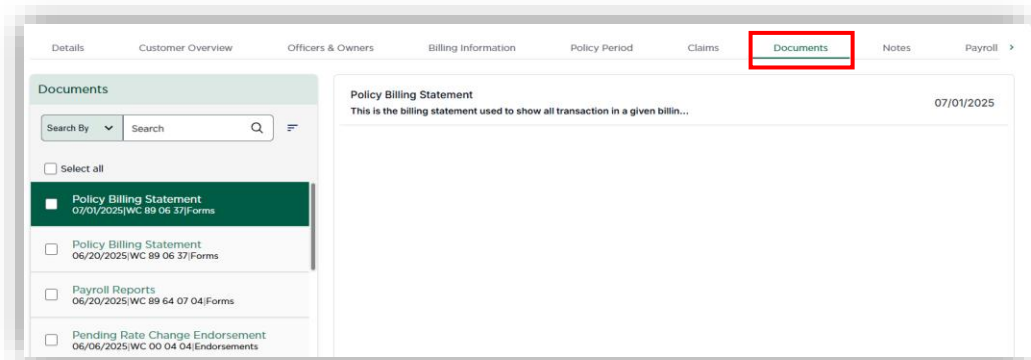
To filter by *Category*, utilize the following options:

- Utilize the drop-down menu to filter Notes based on their *Category* (e.g., Action Items, Reminders)



Documents Section

The **Documents Section** contains documents related to the selected Policy. Search by Document Name, Reference Number, or Document Created Date.



Payroll Reports Section

The **Payroll Reports Section** is sorted by Reporting Period, Estimated, Entered By, Total Amount Due, Group Number, Group Address, Policy Period Status, and Audited. The Payroll Reports Section also shows Reporting Period, Estimated, or Audited. *Note: this section will only be available to policyholders on the Monthly Self Reporting Bill Plan.*

ABC Company
Current Account Balance: \$1.7M

Policy Number: LUC400010
Policy Period: 04/01/2026 - 04/01/2027
Policy Status: Active
Billing Plan: Monthly
Policy Period Balance: \$ 200.00
Written Premium: \$ 78,812.00
Earned Premium: \$ 15,331.00
Incurred Losses: \$ 0.00
Loss Ratio: 0.00%

File First Report of Injury | Make Payment

Details | Customer Overview | Officers & Owners | Billing Information | Policy Period | Claims | Documents | Notes | **Payroll Reports**

Export

Group Number Search Reporting Period Estimated Audited More

Reporting Period	Estimated	Entered By	Total Amount Due	Group Number	Group Address	Policy Period Status	Audited
05/01/2026 - 06/01/2026	No	Not Available	\$ 0.00	Not Available	null	Open	No
04/01/2026 - 05/01/2026	No	Not Available	\$ 0.00	Not Available	null	Open	No

To search by **Group Number**, **Policy Period Status**, or **Audited**, locate the drop-down fields at the top of the Payroll Reports section. You may also filter by Reporting Period, Estimated, or Audited. Select the “More” button to filter by Policy Period Status.

Group Number Search

Group Number

Policy Period Status

Audited

Reporting Period

To filter by *Reporting Period*, utilize the following options:

- **Date Picker:** choose from one of the available date range options or enter a custom date range

Reporting Period

☐ Last 30 days

☐ Last 60 days

☐ Last 90 days

☒ Custom Date Range

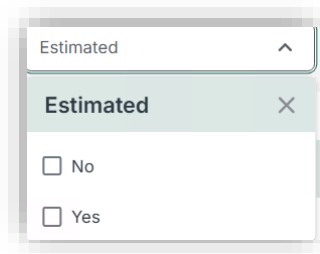
Choose date range

MM/DD/YYYY - MM/DD/YYYY

Estimated

To filter by *Estimated*, utilize the following options:

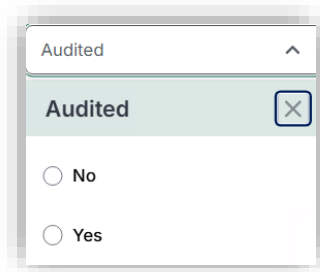
- **Yes or No:** select either Yes or No

A screenshot of a filter dropdown menu for the 'Estimated' field. The dropdown is open, showing a header bar with 'Estimated' and a close button (X). Below the header, there are two options: 'No' and 'Yes', each preceded by an unchecked checkbox.

Audited

To filter by *Audited*, utilize the following options:

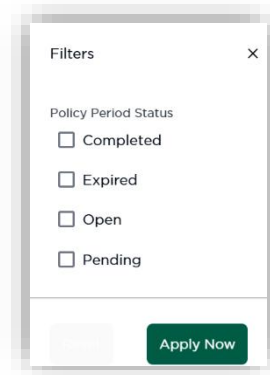
- **Yes or No:** select either Yes or No

A screenshot of a filter dropdown menu for the 'Audited' field. The dropdown is open, showing a header bar with 'Audited' and a close button (X). Below the header, there are two options: 'No' and 'Yes', each preceded by an unchecked radio button.

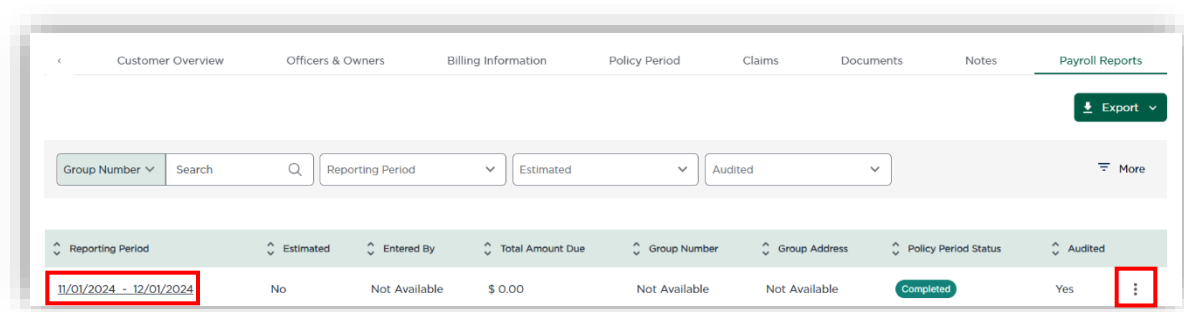
Policy Period Status

To filter by *Policy Period Status*, select the “More” button and utilize the following options:

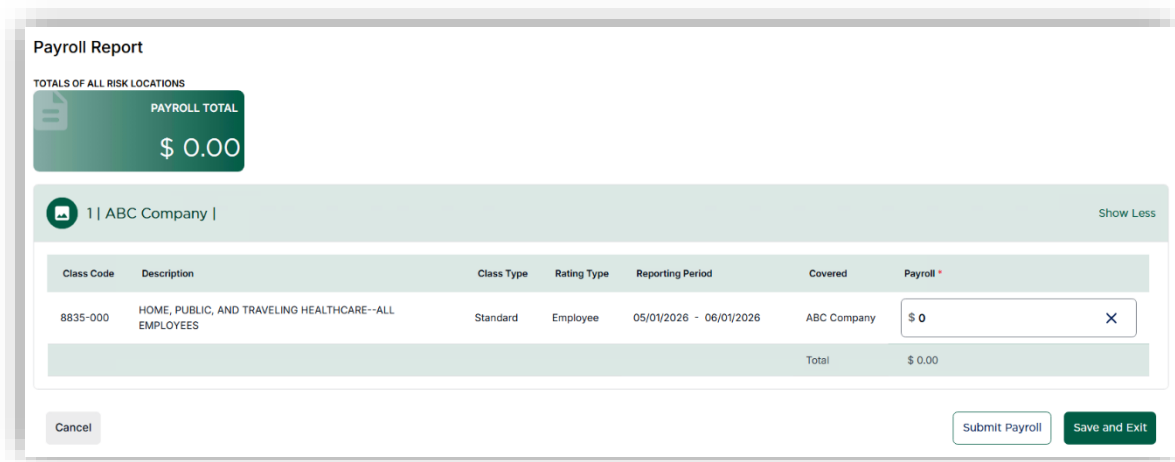
- **Filter Menu:** Select the filter menu labeled *Policy Period Status* on the right-hand side.
- **Select Status:** Choose from predefined options to filter reports based on the selected Policy Period Status (e.g., Completed, Expired, Open, or Pending).

A screenshot of a filter menu titled 'Filters'. It contains a section for 'Policy Period Status' with four options: 'Completed', 'Expired', 'Open', and 'Pending', each preceded by an unchecked checkbox. At the bottom of the menu, there is a green button labeled 'Apply Now'.

Select the **Reporting Period** hyperlink to view the corresponding **Payroll Report**. You may also display the Payroll Report by clicking on the three dots located on the right.



The **Payroll Report** shows Totals of all Risk Locations, as well as Class Code, Description, Class Type, Rating Type, Reporting Period, Covered, and Payroll. You have the option to **Submit Payroll** or **Save and Exit**.



The Payroll Reports section is organized automatically, but you can **sort your view** using Reporting Period & Policy Period Status, Total Amount Due, Group Details (Group Number & Group Address), or Audit Info (Estimated, Entered By, & Audited status).

Use the fields at the top of the section to narrow down your list.

- **Search Bar:** Search directly by Group Number, Policy Period Status, or Audited status.
- **Dropdown Menus:** Use the dropdowns at the top to filter specifically by Reporting Period, Estimated amounts, or Audited reports.

Policy Period Status

To filter by *Policy Period Status*, select the “More” button and utilize the following options:

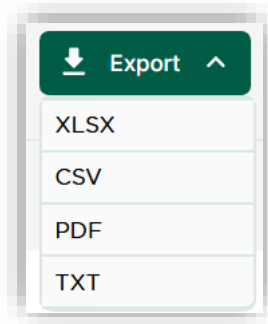
- **Filter Menu:** Select the filter menu labeled *Policy Period Status* on the right-hand side.
- **Select Status:** Choose from predefined options to filter reports based on the selected Policy Period Status (e.g., Completed, Expired, Open, or Pending).

Self-Submit Payroll Reporting

To self- submit a payroll report, begin by selecting the Reporting Period link date range you wish to submit.

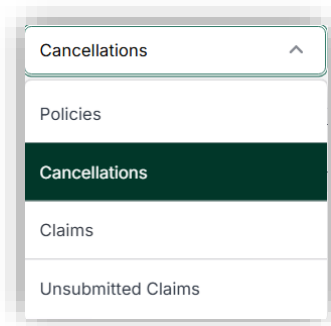
- **Report Payrolls:** Enter the Payroll \$ amount, that corresponds to the class code, in the text box provided.
- **Submit:** Select the “Submit Payroll” button. You may also select “Save and Exit” if you do not wish to submit your payroll at this time.
- Once the “Submit Payroll” button has been selected, payment options will be displayed.

You may also select the “Export” button located on the right side of the page.



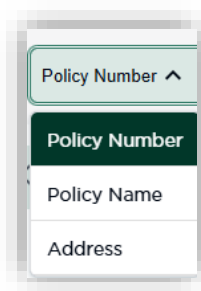
Cancellations

The **Cancellations Section** allows users to manage and review Policies that are Pending or Confirmed Cancelled. Return to the Explore tab and select the drop-down menu option “Cancellations.”



Utilize the search function to search for specific cancellations using the following criteria:

- **Policy Number:** Enter the relevant Policy Number to find specific cancellation details
- **Policy Name:** Input the name of the Policy to filter results accordingly
- **Address:** Utilize the address field to find Cancellations associated with a specific location



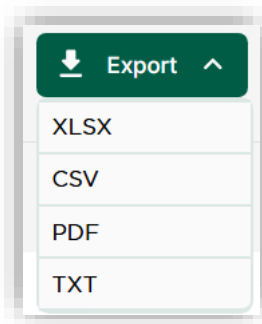
To refine searches, you can apply the following filters:

- **Effective Date:** Select a date or range of dates to filter Cancellations based on when they became effective
- **Written Premium:** Enter a range of Written Premium amounts in the From/To boxes to filter Cancellations based on premium values
- **Loss Ratio:** Use this filter to view Cancellations based on the calculated Loss Ratio associated with the Policy
- **Cancellation Date:** Select the “More” filter button. Specify a date range to search for Cancellations that occurred within that timeframe
- **Cancellation Reason:** Select the “More” filter button. Choose from predefined reasons for cancellation (e.g., Non-Payment, Flat, etc.) to filter results

Viewing Cancellation Details

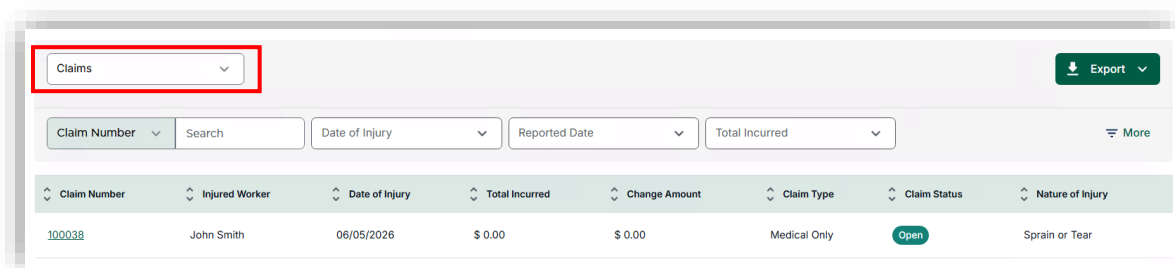
Once a Cancellation is selected, you can view detailed information, including information about the Policy associated with the Cancellation, such as its Status and Premium Amounts. If available, detailed notes on why the policy was canceled will be shown here. Also included in the Cancellation Details is any information or actions required to potentially reinstate the Policy or resolve outstanding issues.

You may also select the “Export” button located on the right side of the page.



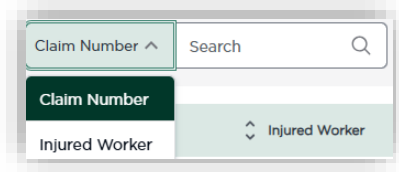
Claims Section

The **Claims Section** displays detailed information regarding individual claims filed under policies. This can be beneficial for tracking the status and details of claims.



You may search for specific claims using the following criteria:

- **Claim Number:** Enter the unique claim number to locate a specific claim quickly
- **Injured Worker:** Input the name of the injured worker to find Claims associated with that individual

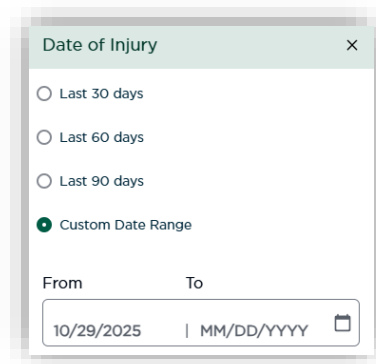


A search interface with two main sections. The top section is labeled 'Claim Number' and contains a search bar with a magnifying glass icon. The bottom section is labeled 'Injured Worker' and contains a dropdown menu with a double-headed arrow icon.

Date of Injury

To filter by *Date of Injury*, utilize the following options:

- **Specific Date:** Utilize the date picker to select a specific date for filtering Claims based on that exact date of injury
- **Date Range:** Enter a range of dates in the From/To fields to filter Claims that occurred within that specified timeframe

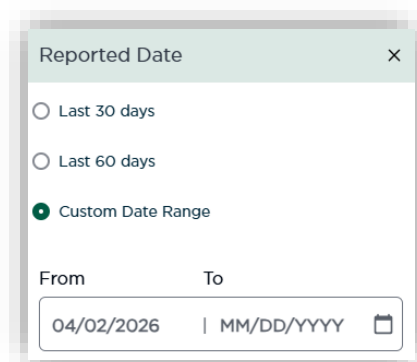


A dialog box titled 'Date of Injury' with a close button (X). It contains four radio button options: 'Last 30 days', 'Last 60 days', 'Last 90 days', and 'Custom Date Range'. The 'Custom Date Range' option is selected. Below the options are two input fields labeled 'From' and 'To'. The 'From' field contains the date '10/29/2025' and the 'To' field contains the placeholder 'MM/DD/YYYY'. A calendar icon is visible next to the 'To' field.

Reported Date

To filter by *Reported Date*, utilize the following options:

- **Specific Date:** Utilize the date picker to select a specific date for filtering Claims based on that exact date of injury
- **Date Range:** Enter a range of dates in the From/To fields to filter Claims that occurred within that specified timeframe

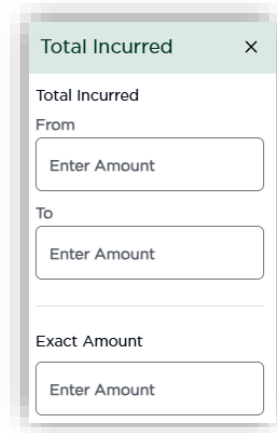


A dialog box titled 'Reported Date' with a close button (X). It contains four radio button options: 'Last 30 days', 'Last 60 days', 'Custom Date Range', and 'Last 90 days'. The 'Custom Date Range' option is selected. Below the options are two input fields labeled 'From' and 'To'. The 'From' field contains the date '04/02/2026' and the 'To' field contains the placeholder 'MM/DD/YYYY'. A calendar icon is visible next to the 'To' field.

Total Incurred

To filter by *Total Incurred*, utilize the following options:

- **Amount Range:** Enter a range of total incurred amounts in the From/To boxes to filter Claims based on financial metrics related to the Claim
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter Claims that match that exact total incurred amount



The screenshot shows a modal dialog box titled "Total Incurred" with a close button (X) in the top right corner. The dialog contains three input sections: "From" and "To" for a range, and "Exact Amount" for a specific value. Each section has a text input field with the placeholder text "Enter Amount".

Change Amount

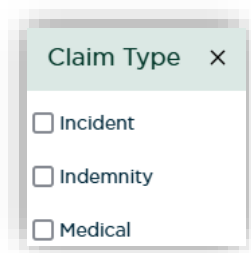
To filter by *Change Amount*, select the “More” filter button and utilize the following options:

- **Amount Range:** Enter a range of total incurred amounts in the From/To boxes to filter Claims based on financial metrics related to the Claim
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter Claims that match that exact total incurred amount

Claim Type

To filter by *Claim Type*, select the “More” filter button and utilize the following options:

- **Predefined Types:** Select from the drop-down menu of Predefined Claim Types (e.g., Workers' Compensation, Liability) to filter Claims based on their classification



The screenshot shows a modal dialog box titled "Claim Type" with a close button (X) in the top right corner. The dialog contains a list of three predefined claim types, each with an unchecked checkbox: "Incident", "Indemnity", and "Medical".

Claim Status

To filter by *Claim Status*, select the “More” filter button and utilize the following options:

- **Closed:** Choose this option to filter Claims that have been fully processed and closed
- **Incomplete:** Select this option to filter Claims that are awaiting further action or resolution
- **Open:** Select this option to filter Claims that are currently open and under review

Nature of Injury

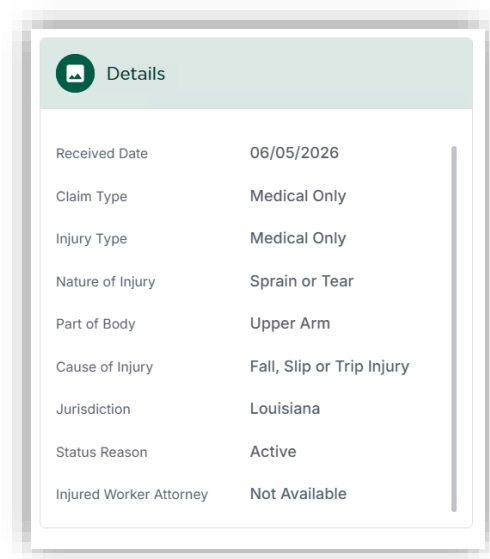
To filter by *Nature of Injury*, select the “More” filter button and utilize the following options:

- **Predefined Types:** Select from the drop-down menu of Predefined Nature of Injury options to filter Claims

Claim Details

Once a Claim is selected, you may view detailed information, including an overview of the Claim, with its status and key dates. You can also see detailed information about the Claim, including:

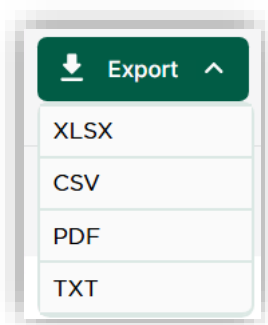
- **Date Reported:** The date when the Claim was reported
- **Received Date:** The date when the Claim was received by the insurer
- **Injury Type:** Categorization of the injury (e.g., Minor, Major)
- **Nature of Injury:** Description of the nature of the injury based on specific classifications
- **Part of Body:** Information about the body part affected
- **Cause of Injury:** Detailed circumstances surrounding the injury
- **Jurisdiction:** The state or jurisdiction where the claim was filed
- **Status Reason:** Current status of the Claim (e.g., Under Review, Awaiting Documentation)
- **Injured Worker Attorney:** Name of the attorney representing the injured worker



The screenshot shows a 'Details' page with a light green header. Below the header is a table with two columns: the first column lists the claim details, and the second column provides the corresponding values. The details listed are Received Date, Claim Type, Injury Type, Nature of Injury, Part of Body, Cause of Injury, Jurisdiction, Status Reason, and Injured Worker Attorney.

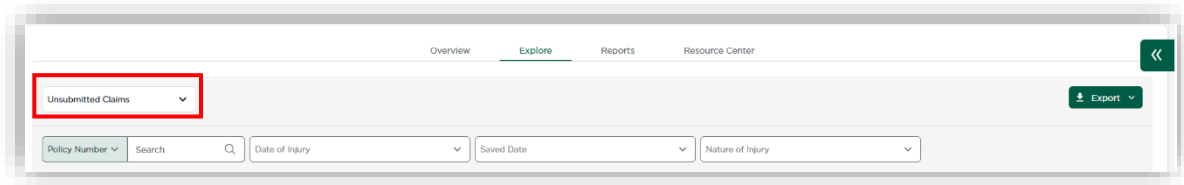
Details	
Received Date	06/05/2026
Claim Type	Medical Only
Injury Type	Medical Only
Nature of Injury	Sprain or Tear
Part of Body	Upper Arm
Cause of Injury	Fall, Slip or Trip Injury
Jurisdiction	Louisiana
Status Reason	Active
Injured Worker Attorney	Not Available

You may also select the “Export” button located on the right side of the page.



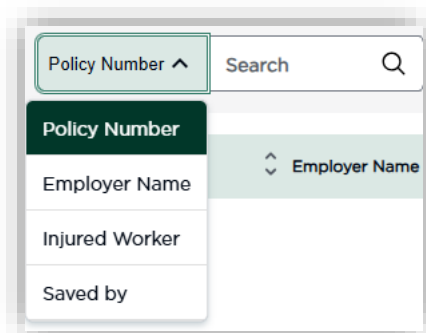
Unsubmitted Claims Section

The **Unsubmitted Claims Section** allows you to manage and review Claims that have been initiated but are not yet formally submitted for processing.



You may search for specific Unsubmitted Claims using the following criteria:

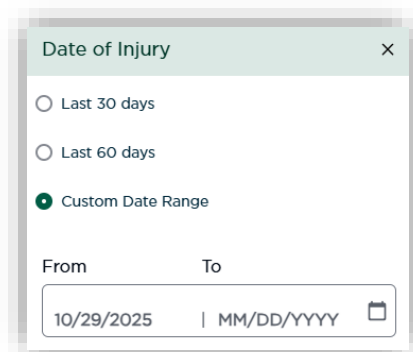
- **Policy Number:** Enter the relevant Policy number to filter unsubmitted Claims associated with that specific Policy
- **Policyholder Name:** Input the name of the policyholder to locate unsubmitted Claims tied to that policyholder
- **Injured Worker:** Use this field to search for Claims associated with a particular injured worker
- **Saved By:** Identify who saved the unsubmitted claim, allowing for efficient tracking of claim entries



Date of Injury

To filter by *Date of Injury*, utilize the following options:

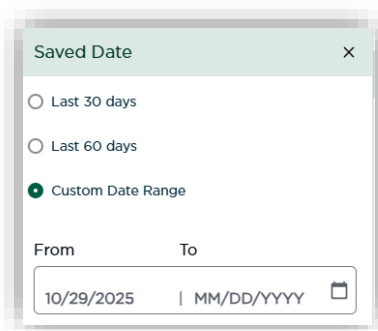
- **Specific Date:** Utilize the date picker to select a specific date for filtering unsubmitted Claims based on that exact date of injury
- **Date Range:** Enter a range of dates in the From/To fields to filter Claims that occurred within that specified timeframe



Saved Date

To filter by *Saved Date*, utilize the following options:

- **Specific Date:** Select a specific date to filter unsubmitted Claims based on when they were saved
- **Date Range:** Specify a range of dates to filter Claims saved within that timeframe



A screenshot of a 'Saved Date' filter modal. The modal has a title bar with 'Saved Date' and a close button. It contains three radio button options: 'Last 30 days', 'Last 60 days', and 'Custom Date Range'. The 'Custom Date Range' option is selected. Below the options, there are two input fields labeled 'From' and 'To'. The 'From' field contains the date '10/29/2025' and the 'To' field contains the placeholder 'MM/DD/YYYY'. A calendar icon is visible next to the 'To' field.

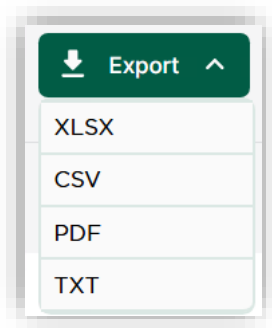
Nature of Injury

Use this filter to search unsubmitted Claims based on the **classification of the injury** (e.g., Minor, Major).

Viewing Unsubmitted Claim Details

Once an Unsubmitted Claim is selected, you may view detailed information, including the Claim Summary, Claim Number, Injured Worker Information, a Description of the Incident, and the Proposed Compensation.

You may also select the “Export” button located on the right side of the page.

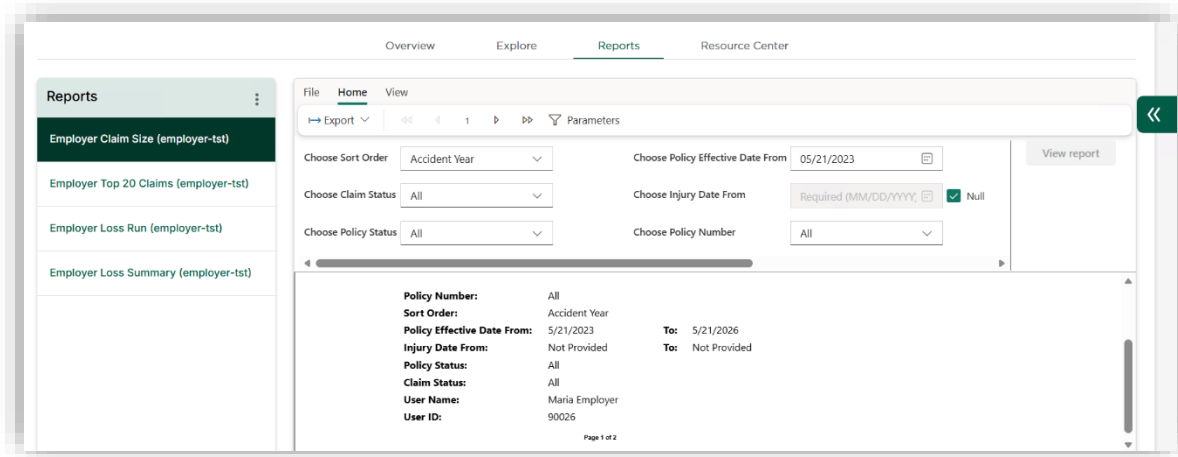


A screenshot of an 'Export' button and its dropdown menu. The button is green with a white download icon and the text 'Export'. The dropdown menu is open, showing four options: 'XLSX', 'CSV', 'PDF', and 'TXT'.

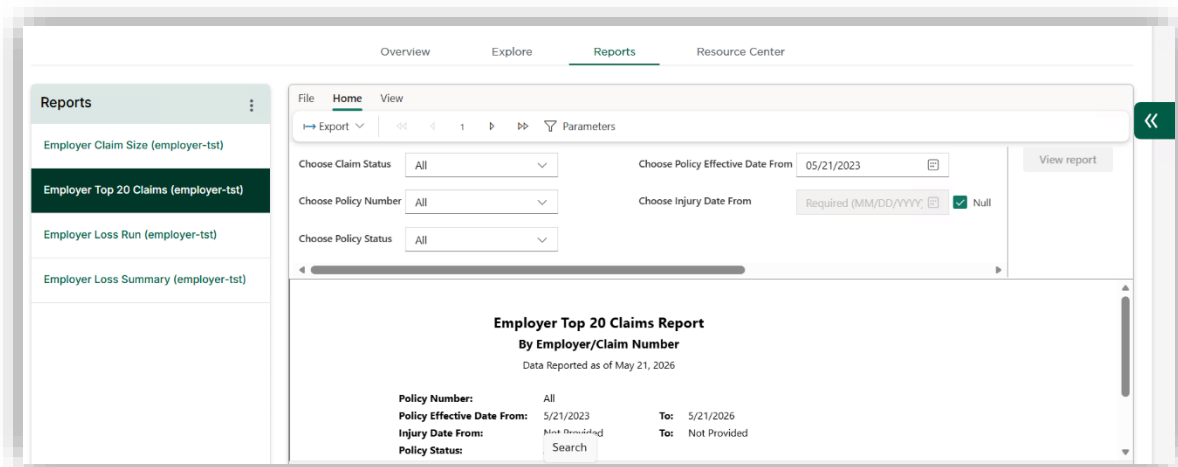
Reports

In the **Reports Section**, explore various reports related to Policies and Claims associated with your LUBA Connect user account.

- **Available Reports:** Access a variety of reports including:
 - **Policyholder Claim Size:** Provides insight into the size and distribution of claims across your organization.



- **Policyholder Top 20 Claims:** Highlights your largest or most significant claims for easier monitoring and follow-up.



- **Policyholder Loss Run:** Provides a detailed claims history that can be downloaded and shared as needed.

OverviewExploreReportsResource Center

Reports

Employer Claim Size (employer-tst)
Employer Top 20 Claims (employer-tst)
Employer Loss Run (employer-tst)
Employer Loss Summary (employer-tst)

FileHomeView

ExportParameters

Choose Policy Effective Date From05/21/2023Choose Policy Effective Date To05/21/2026View report

Choose Policy StatusAllChoose Policy NumberAll

Employer Loss Run Report
By Policy Year/Policy Period/Location
Data Reported as of May 21, 2026

Policy Number:All
Policy Effective Date From:5/21/2023To:5/21/2026
Policy Status:All
User Name:Maria Employer
User ID:90026
Page 1 of 3

- **Policyholder Loss Summary:** Offers a consolidated view of losses to help you understand overall claim activity.

OverviewExploreReportsResource Center

Reports

Employer Claim Size (employer-tst)
Employer Top 20 Claims (employer-tst)
Employer Loss Run (employer-tst)
Employer Loss Summary (employer-tst)

FileHomeView

ExportParameters

Choose Policy Effective Date From05/21/2023Choose Policy Effective Date To05/21/2026View report

Choose Claim StatusAllChoose Injury Date FromRequired (MM/DD/YYYY)Choose Policy StatusAllChoose Policy NumberAll

Employer Loss Summary Report
By Location
Data Reported as of May 21, 2026

Policy Number:All
Policy Effective Date From:5/21/2023To:5/21/2026
Injury Date From:Not ProvidedTo:Not Provided
Policy Status:AllFile Explorer

Resource Center

The **Resource Center** provides additional materials and support documents to assist you in navigating the LUBA Connect portal effectively:

- **Help Guides:** Access user manuals to help with common issues
- **Contact Support:** Information on how to reach customer support for further assistance
- **Articles and Newsletters:** Related articles and newsletters
- **FAQ's:** Common questions and answers related to the LUBA Connect portal

