LUBA Connect

Agent User Guide

LUBA WORKERS' COMP.
A CASUALTY INSURANCE COMPANY

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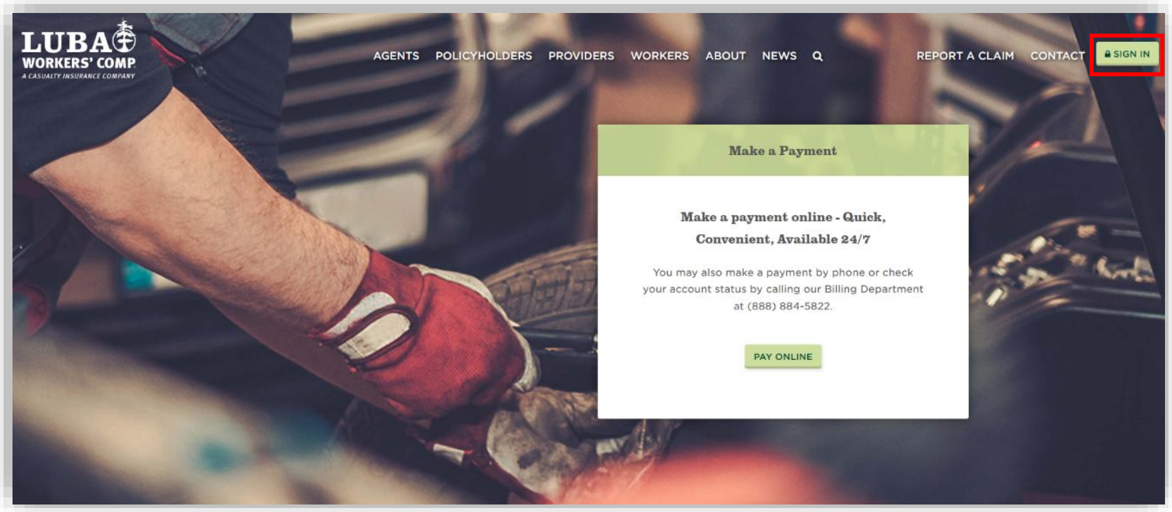
Getting Started

Accessing the LUBA Connect Portal

IMPORTANT: All users must create a new account to access the upgraded portal. Your previous log-in credentials and saved access links will not work.

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. Select "Sign In".

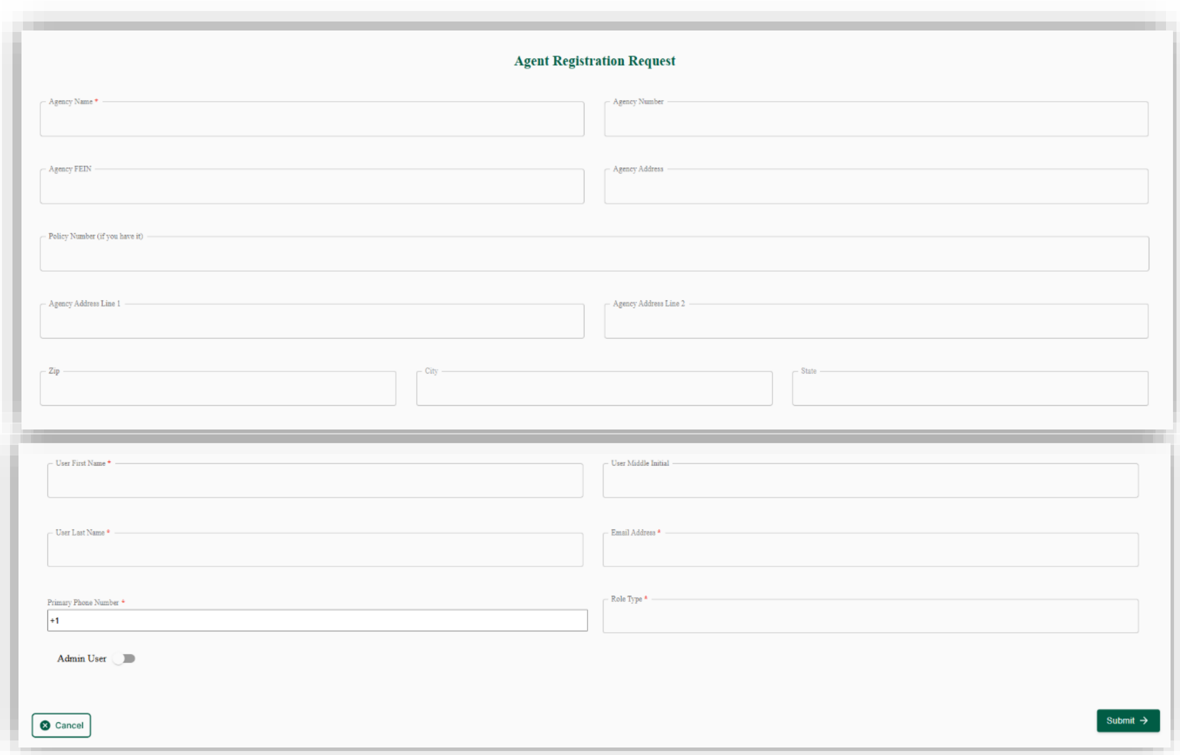


After selecting "Sign In", the following screen will appear. Select the Agent profile and select "Sign In" to LUBA Connect.

Please note, the *Sign In* button is reserved for Agencies who have previously registered with the LUBA Connect portal. If this is your Agency's first time accessing the upgraded LUBA Connect portal, please complete self-registration first.

Self-Registration

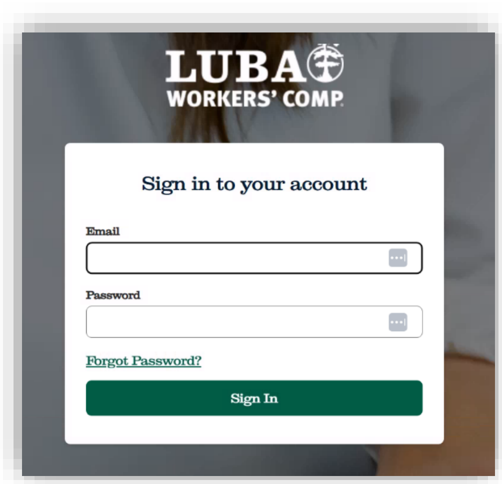
To complete self-registration, enter the requested information in the form shown below.



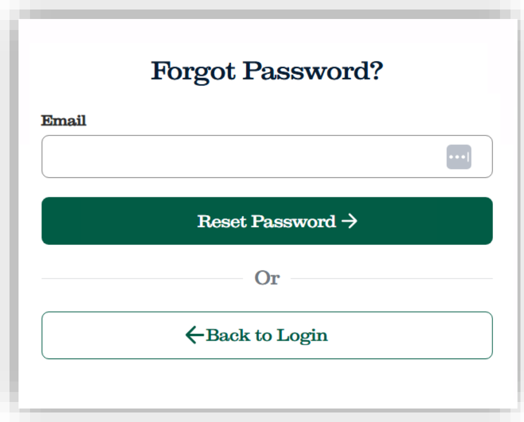
Once you have completed the registration, select the Submit button. Your registration information will be directed to LUBA, who will review your request. **Please note, it can take up to 2-3 business days for registration requests to be approved.** If there are any issues with your request, LUBA personnel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

Registered Profiles

Once you have received new credentials, select the Agent profile, and click Sign In. Enter your new username and password to enter the upgraded portal. If you cannot remember your password, you may select “Forgot Password?”

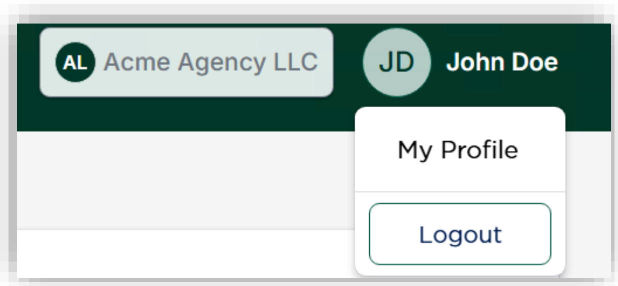


The following screen will appear prompting you to enter your email. Select the button labeled "Reset Password” and instructions will be sent.



Profile

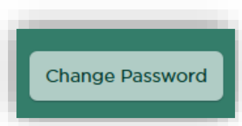
Navigate to the **Profile Section** on the top right of the screen to manage your account settings and personal information.



Change Password

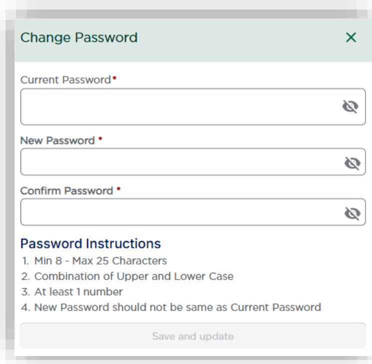
To change your password, follow these steps:

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



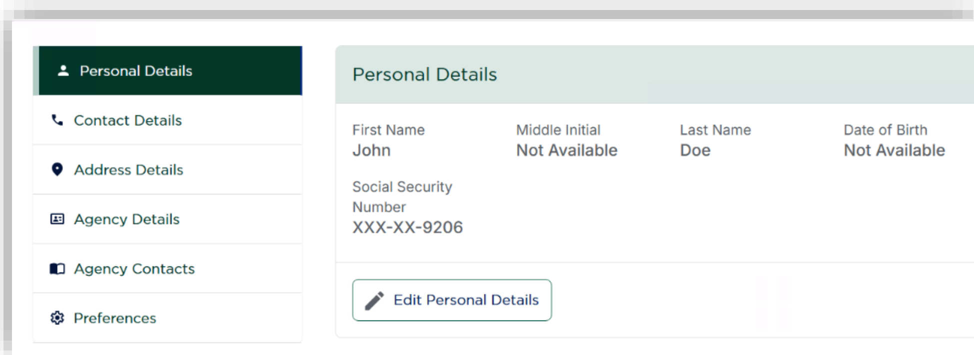
3. Enter your current password in the first field.
4. Type your new password in the next field. Ensure it meets the required criteria, which may include a combination of uppercase letters, lowercase letters, numbers, and special characters.
5. Re-enter your new password in the **Confirm Password** box to verify.

6. Select "Save and Update" to apply the changes. A confirmation message will appear indicating that your password has been successfully updated.



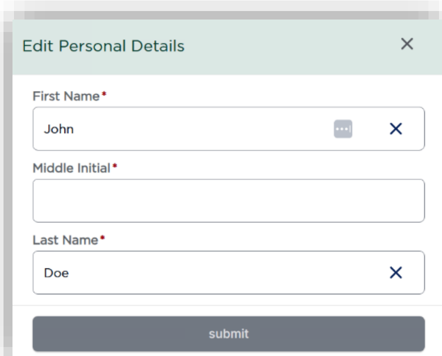
Personal Details

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



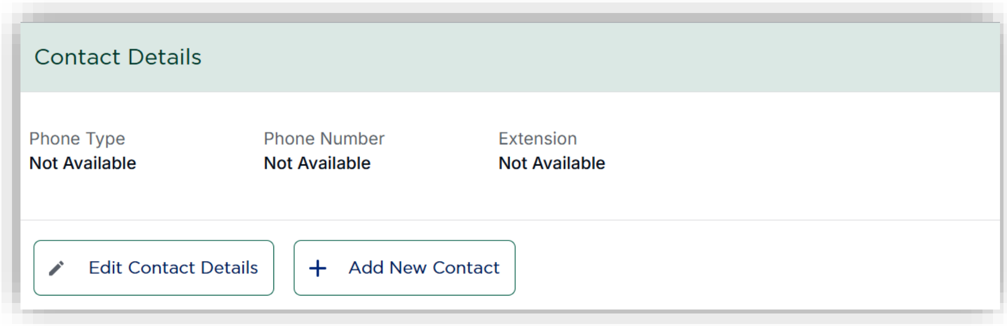
To edit your Personal Details, follow the steps below:

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



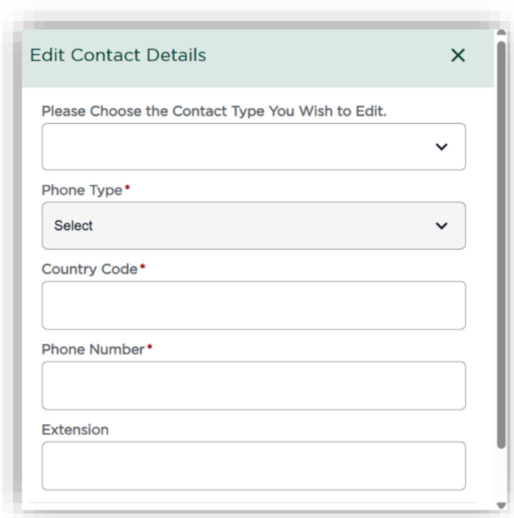
Contact Details

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



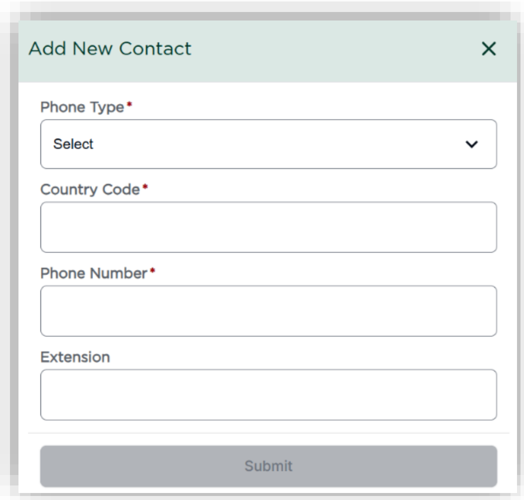
Edit Contact Details: Select the *Edit Contact Details* option.

1. Choose the Contact Type you wish to edit.
2. Enter the required fields such as Phone Type, Country Code, Phone Number, and Extension.

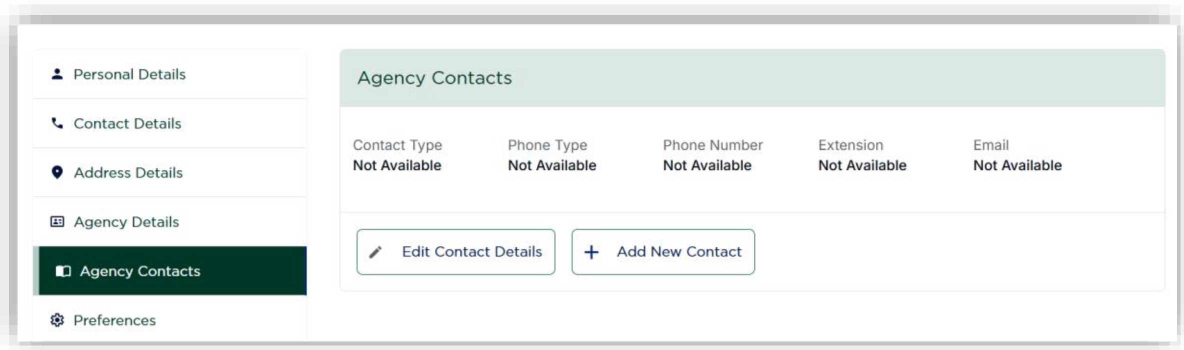


Add New Contact:

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

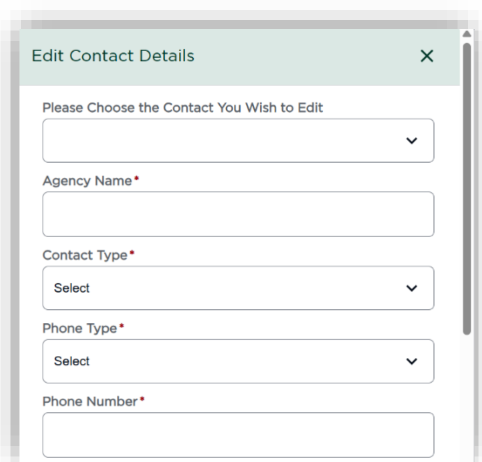


You may also edit or view Address Details, view Agency Details, or update Agency Contacts.



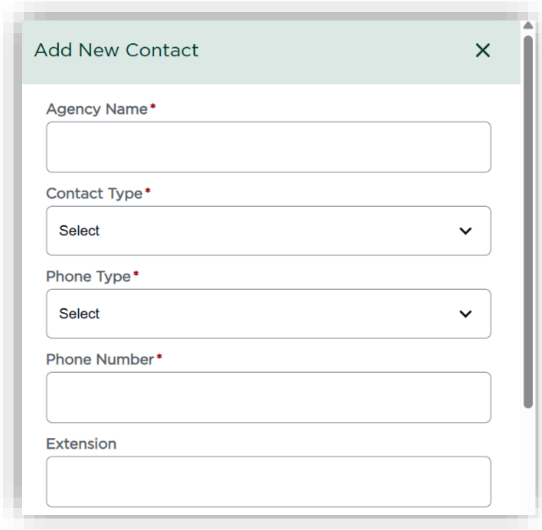
<u>Update Agency Contacts:</u>

1. Select the *Edit Contact Details* button.
2. Select the contact you wish to edit from the drop-down menu provided.
3. Enter the required information (e.g., Agency Name and Contact Type).
4. Select "Save and Update" to update Agency contact details.



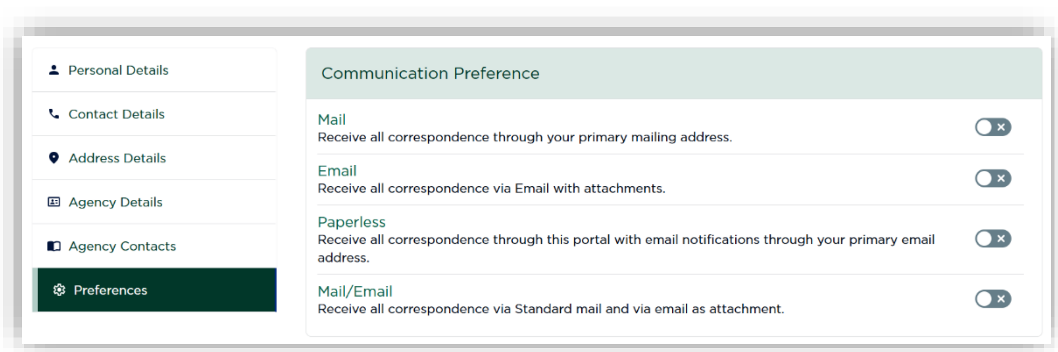
Add New Agency Contact:

1. Select the *Add New Contact* button.
2. Enter the Agency Name.
3. Enter all required information (e.g., Contact Type and Phone Type).
4. Select "Submit" to ensure your information is saved.



Preferences

The **Preferences Section** allows you to set your Communication Preferences.



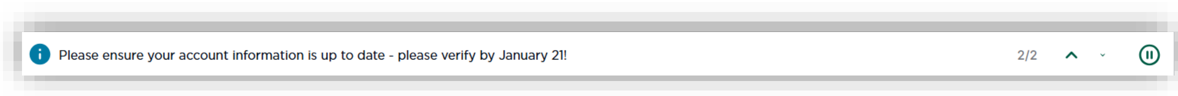
Follow the steps below to set your communication preferences:

1. **Access Preferences:** Select "Preferences" in the Profile menu.
2. **Communication Preference:** Toggle the options 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 "Yes I'm Sure" to confirm changes.

Dashboard

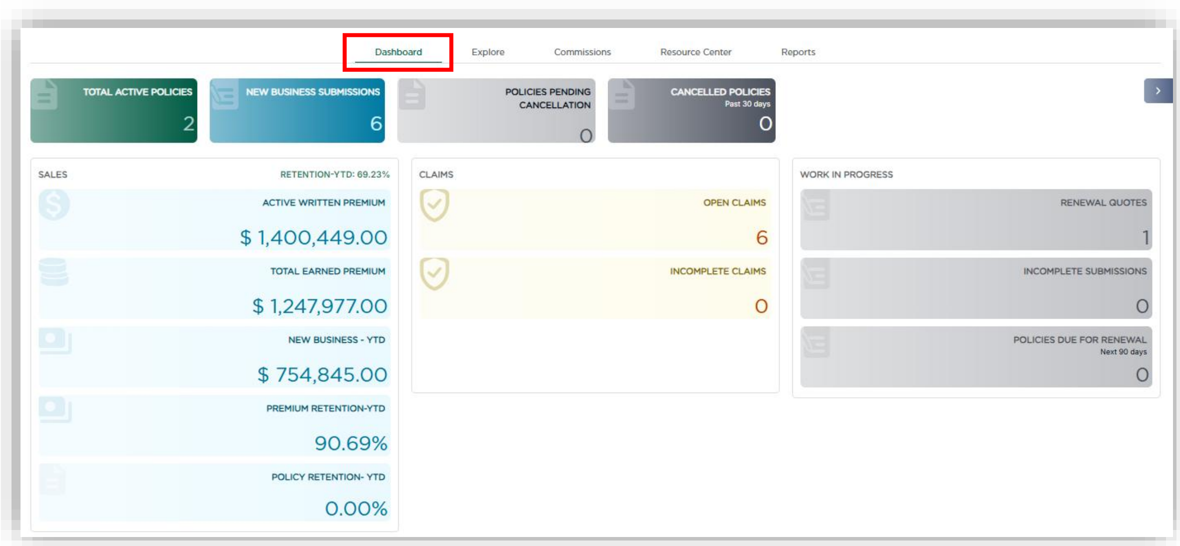
Notifications Banner

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.



Dashboard Tab

The **Dashboard Tab** provides a current snapshot of pertinent Agency information, including Total Active Policies, New Business Submissions, Policies Pending Cancellation, and Cancelled Policies (within the last 30 days). Click on each tile to expand and display more information.



The **Dashboard Tab** displays three main categories: **Sales, Claims**, and **Work in Progress**.

Sales

- **Active Written Premium** displays the amount of currently active written premium
- **Total Earned Premium** displays the amount of total annual earned premium
- **New Business – YTD** displays the total new business premium year-to-date
- **Premium Retention – YTD** displays the percentage of premium retention year-to-date
- **Policy Retention – YTD** displays the percentage of policy retention year-to-date

Claims

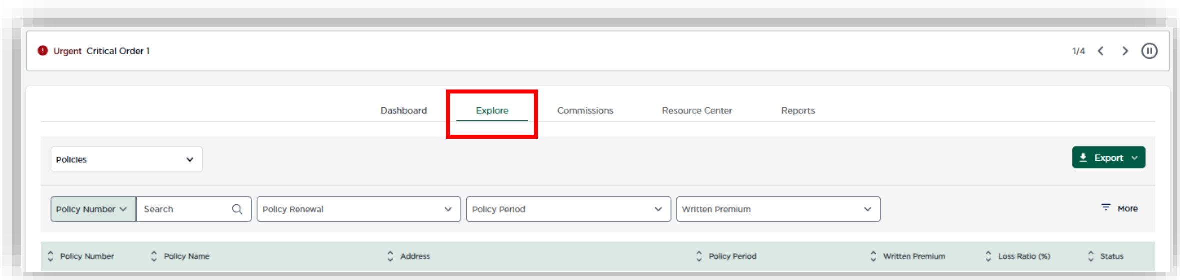
- **Open Claims** displays claims that are currently active in Open status
- **Incomplete Claims** displays any claim reports that have been started but not yet submitted - Review this list regularly to complete and submit pending claims

Work In Progress

- **Renewal Quotes** displays quotes on upcoming renewals
- **Incomplete Submissions** displays submissions that have been started but not yet submitted - Review this list regularly to complete and submit pending submissions
- **Policies due for Renewal** displays policies with upcoming renewals within 90 days

Explore Tab

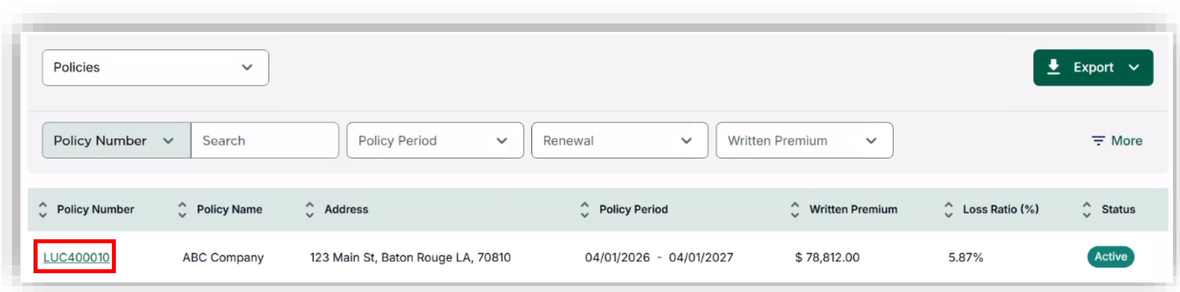
The **Explore Tab** on the Dashboard allows a detailed look at your information. Users can filter and search for data within the following categories: **Policies, Cancellations, Pending Cancelled Policies, Quotes, Claims, Unsubmitted Claims** and **Unsubmitted Quotes**. Refer to the individual sections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



Policies

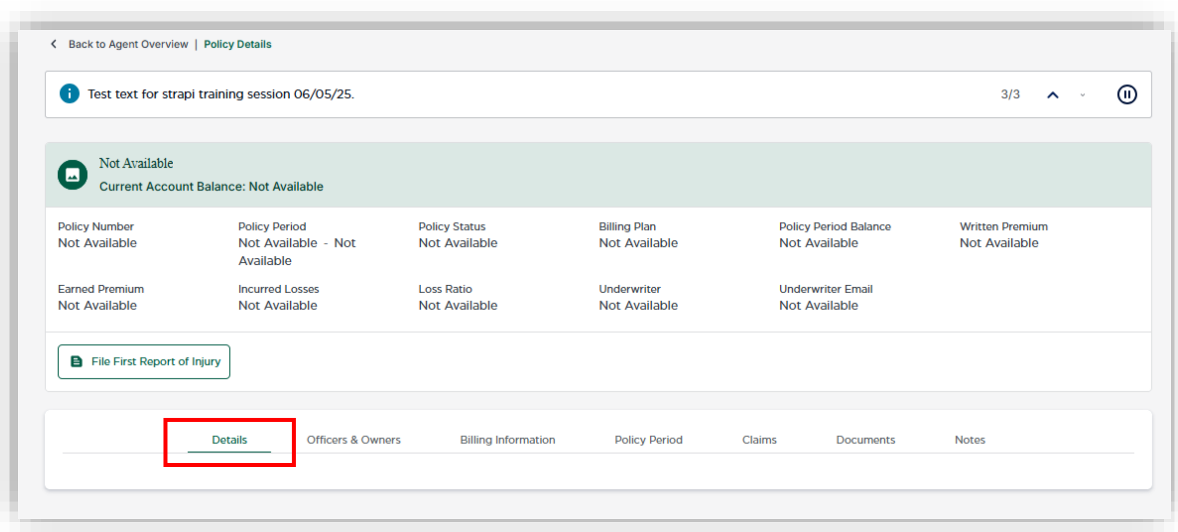
Utilize the drop-down menu to select "Policies" to view the Policy Section.

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



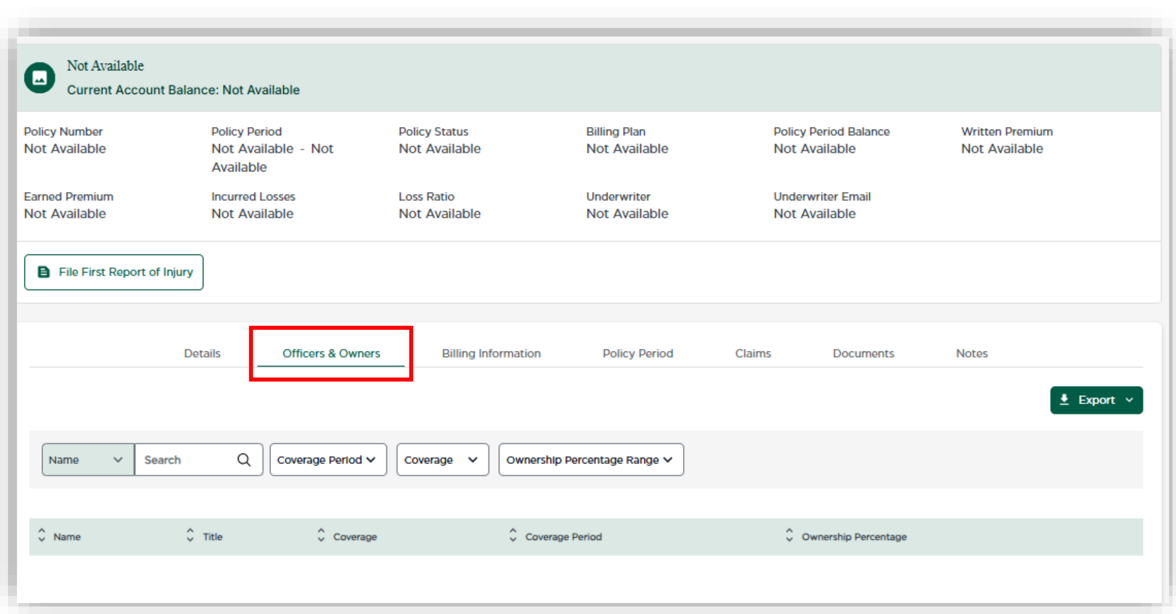
Details Section

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 file a first report of injury directly. Select “File First Report of Injury” to proceed with this step.

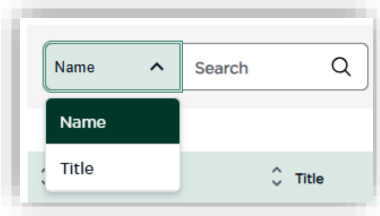


Officers & Owners Section

The **Officers and Owners Section** displays the Names, Titles, Coverage, Coverage Period and Ownership Percentages.



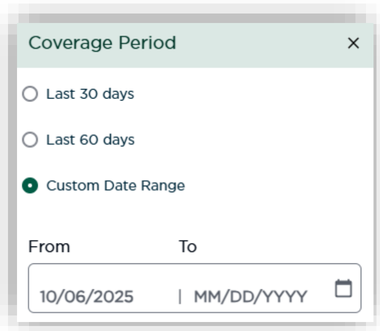
This section also enables you to search for specific Officers or Owners by Name or Title. Enter the Name or Title in the search bar provided to display results.



You also have the option to filter results based on Coverage Period, Coverage, and Ownership Percentage Rate.

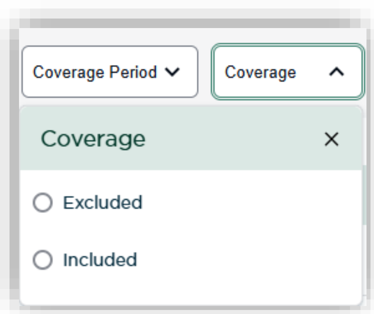
<u>Coverage Period</u>

- 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



<u>Coverage</u>

- Coverage indicates the listing of any Excluded or Included Owners/Officers
- To filter by **Coverage**, utilize the drop-down menu provided
- Select from the following options: Excluded or Included

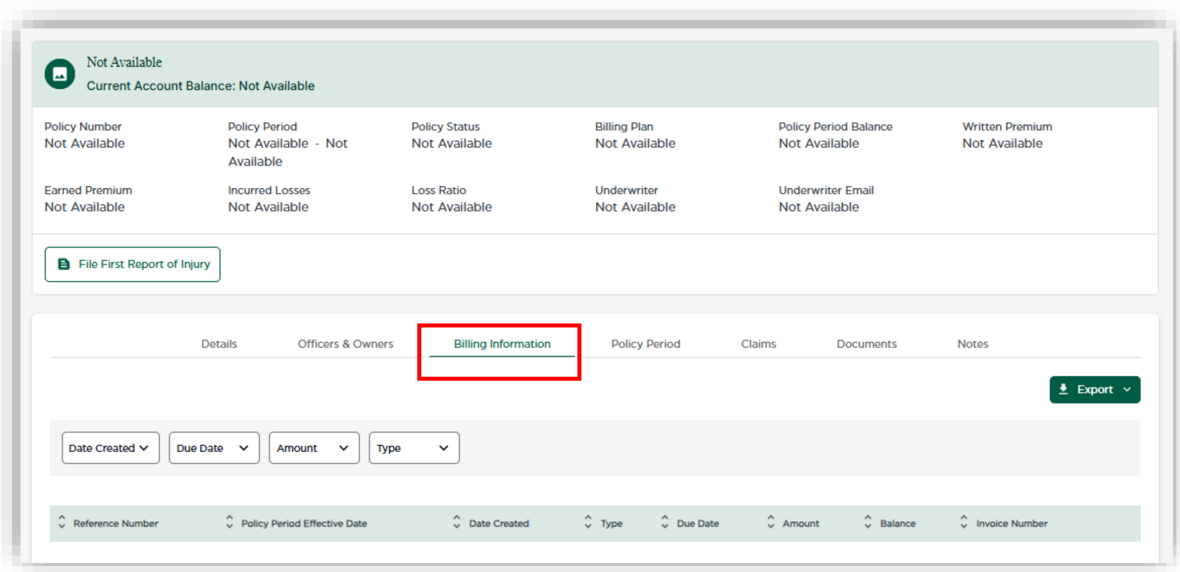


<u>Ownership Percentage Range</u>

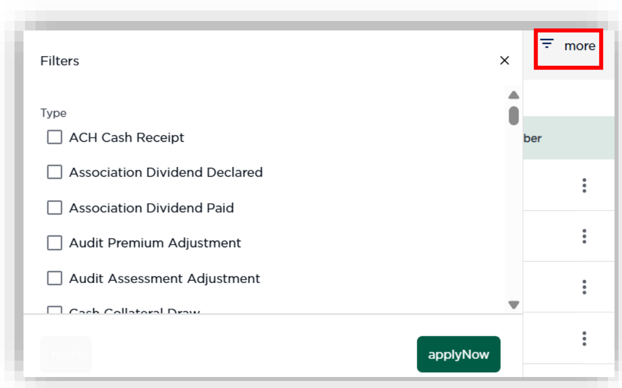
- **Ownership Percentage Range:** Enter a numerical value in both the From and To boxes provided
- **Exact Percentage:** Enter an exact value in the field provided

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



Please note, there are additional secondary filter options by clicking more.



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

Due Date

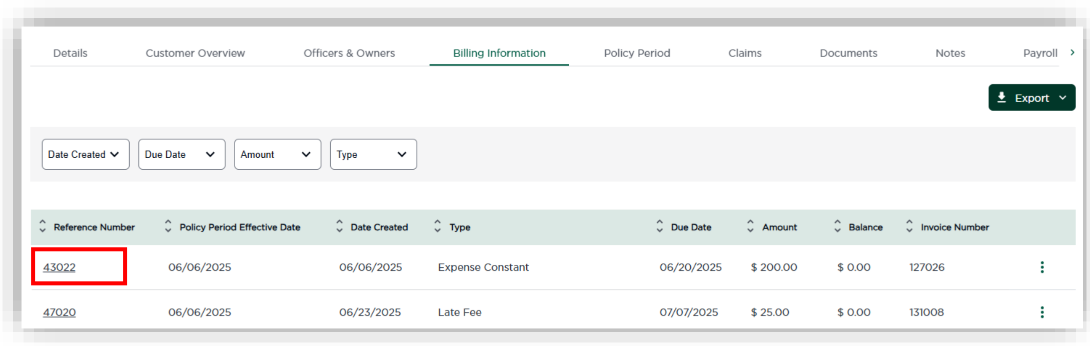
- To filter by *Due Date*, utilize the drop-down menu provided
- Select from the following options: Last Month, Last 3 Months, Last 6 Months, Last 1 Year, or by entering a Custom Date Range
- **Custom Date Range:** Enter From/To Dates in the boxes provided to filter by a custom date range

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

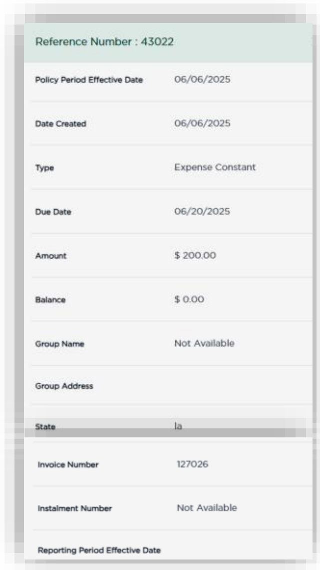
Reference Number

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

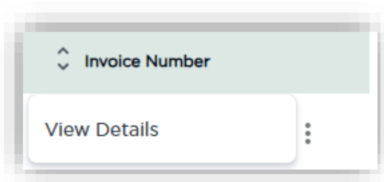


A pop-up window will appear with the following information:

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

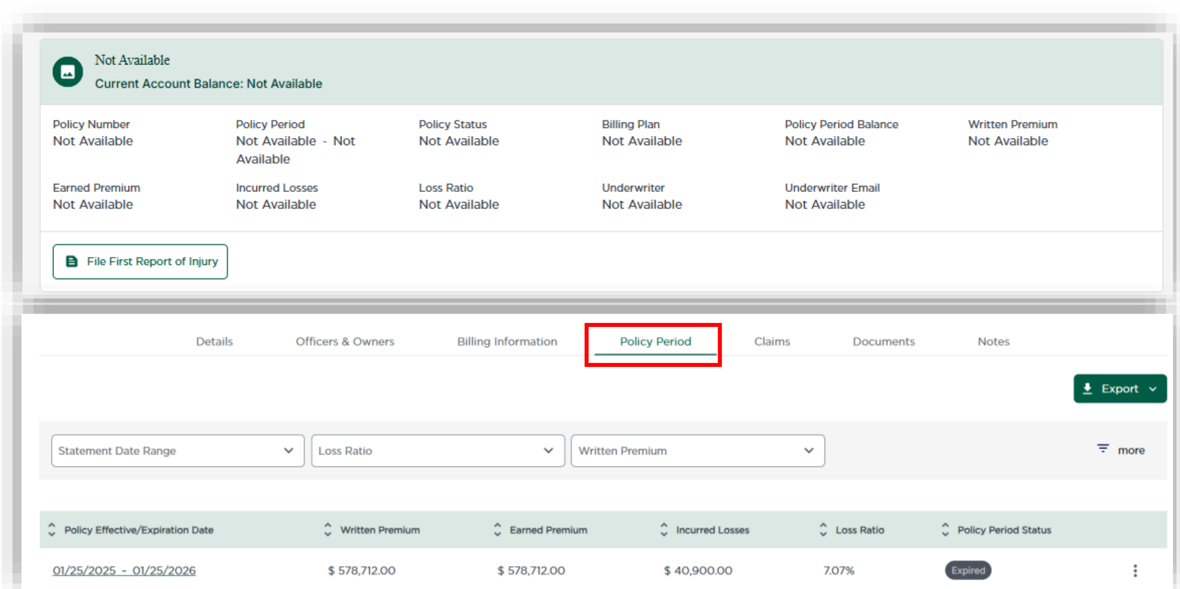


Alternatively, you may also view Billing Period details by selecting the three dots to the right of Invoice Number and selecting the *View Details* button. The same pop-up window showing Reference Number details depicted above will appear.



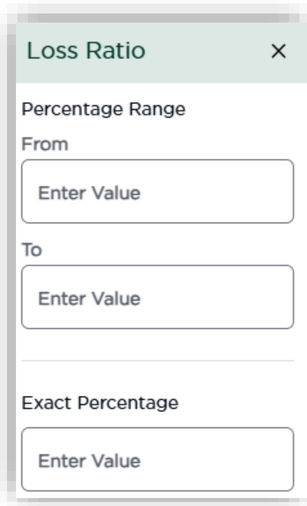
Policy Period Section

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.

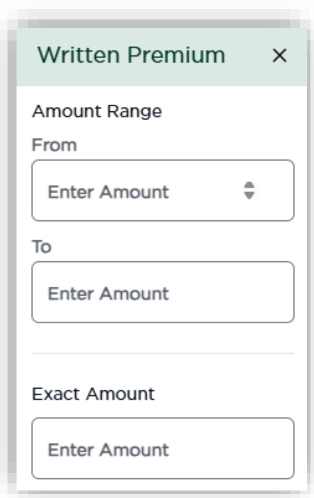


Statement Date Range
- To filter by a *Statement Date Range*, utilize the drop-down menu provided
- Enter specific calendar dates in the From/To fields provided

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

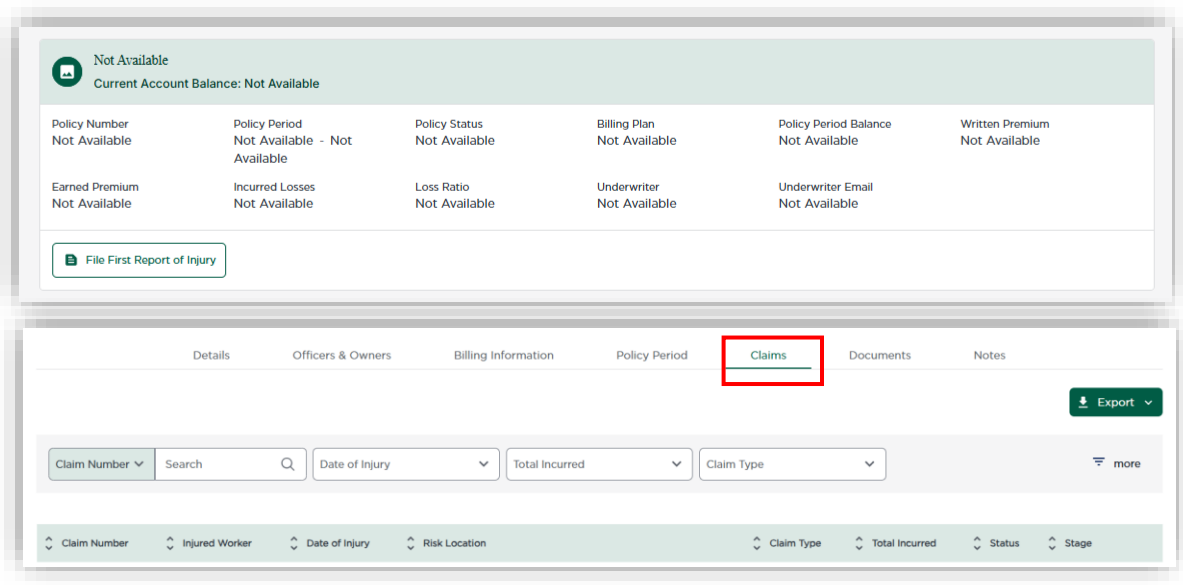


Written Premium
To filter by *Written Premium,* utilize the following options:
- **Amount Range:** Enter a range of written premiums in the From/To boxes to filter reports based on total written premiums
- **Exact Amount:** Input a specific numerical value in the Exact Amount field to filter reports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

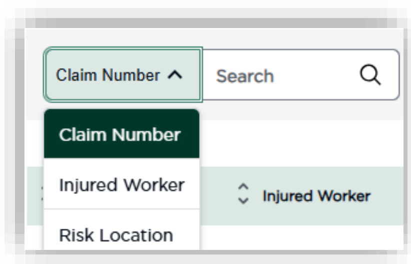


Claims

The **Claims Section** displays information specific to an individual Claim Numbers, Injured Workers, Date of Injury, Risk Location, Claim Type, Total Incurred, Status, or Stage.



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



<u>Date of Injury</u>

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

<u>Total Incurred</u>

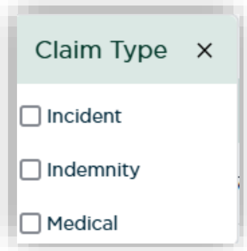
To filter by *Total Incurred*, utilize the following options:

- **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:

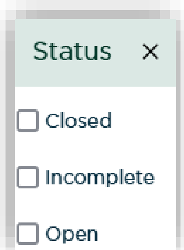
- **Predefined Types**: Select from the drop-down menu of predefined claim types (e.g., Workers' Compensation, Liability) to filter Claims based on their classification



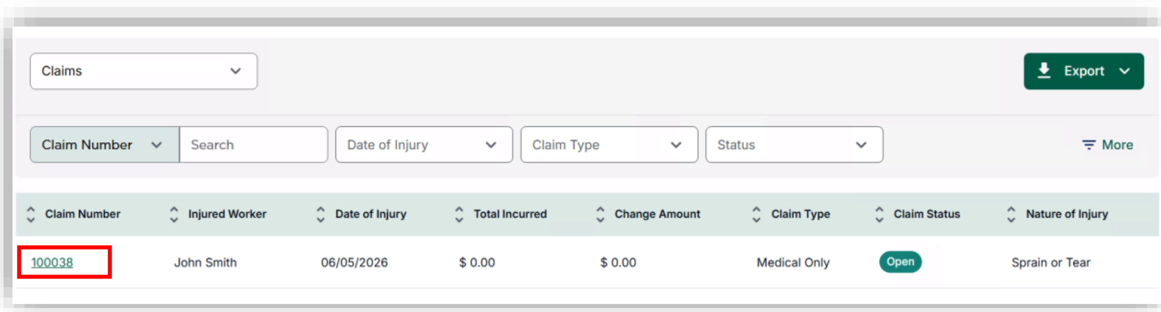
Status

To filter by *Status*, utilize the following options under the “More” button:

- **Open:** Select this option to filter Claims that are currently open and under review
- **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



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



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 shows Claim Number, Total Incurred, Claim Owner Email, Injured Worker, Stage, Total Remaining Reserve, Date of Injury, Claim Type, Policyholder, Claim Owner, Policy Number, and Claim Owner Phone.

Details Tab

Details:

- **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

Policyholder:

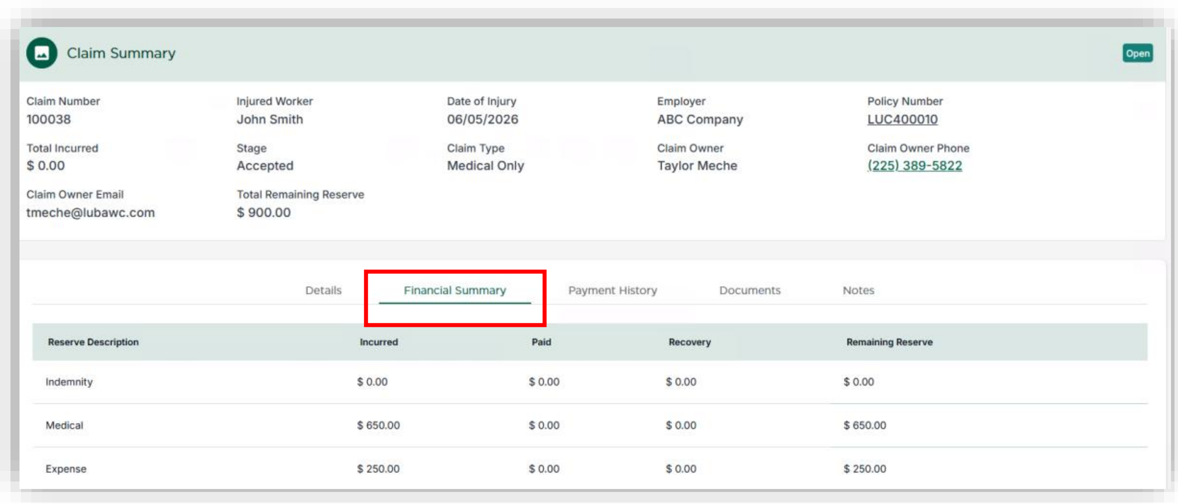
- **Policyholder Name:** Displays the Policyholder's Name
- **Policyholder Phone:** Displays the Policyholder's Phone Number
- **Policyholder Email:** Policyholder's Email
- **Policy Period:** Displays the Policy Period
- **Physical Address:** Policyholder's Physical Address
- **Mailing Address:** Policyholder's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

Injury Location:

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

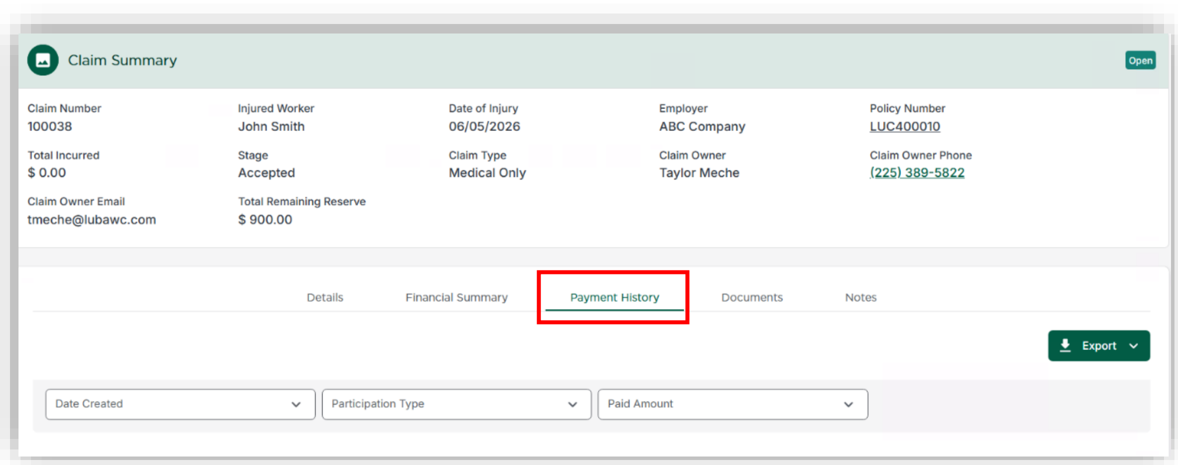
Financial Summary Tab:

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



Payment History Tab:

The **Payment History** 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 Form – Through.



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

<u>Date Created</u>

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

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

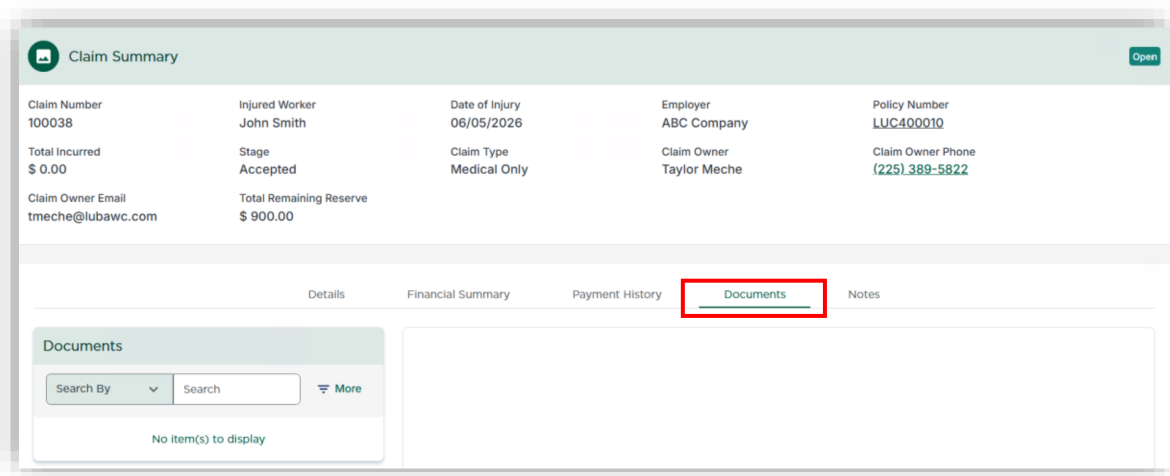
- **Provider:** Select this option to filter by Provider
- **Insured Worker:** Select this option to filter by Insured Worker

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

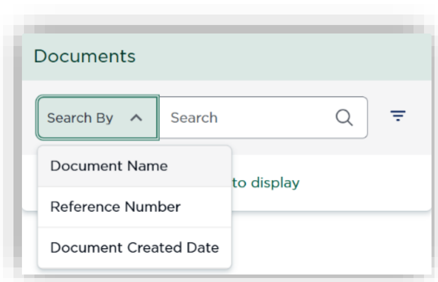
Documents Tab:

The **Documents Tab** 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.



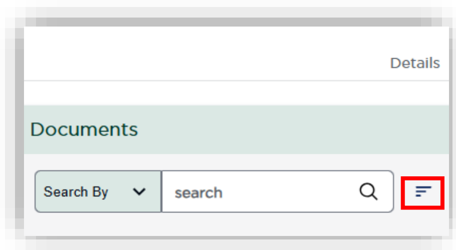
Search by Document Name, Reference Number, or Document Created Date:

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

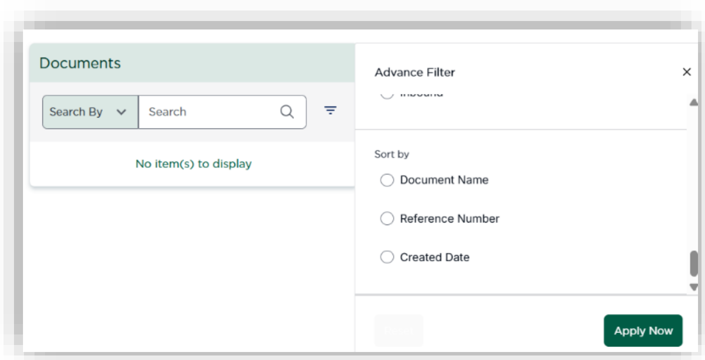


Advance Filter Options

Select the *Advance Filter* button to access more detailed filtering options. Advanced filtering selections available include: **Document Created Date, Category,** and **Document Source.**

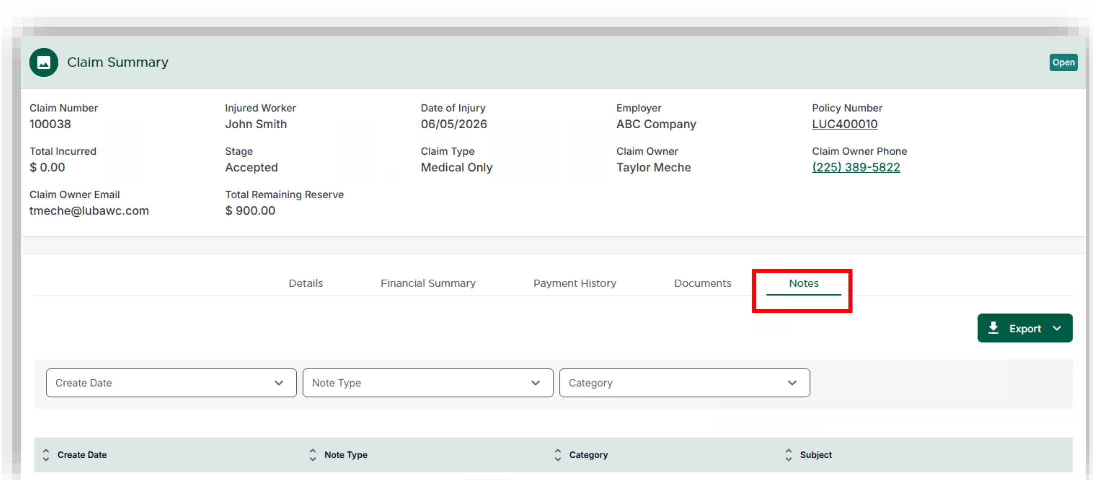


You may also sort your results by Document Name, Reference Number, or Created Date within the Advance Filter drop-down menu.



Notes Tab:

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



Create Date:

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

- **Date Picker**: Use the date picker adjacent to the *Create Date* field to select a specific date for filtering notes based on when they were created

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., Note, Phone, or Email) to filter notes according to their classification

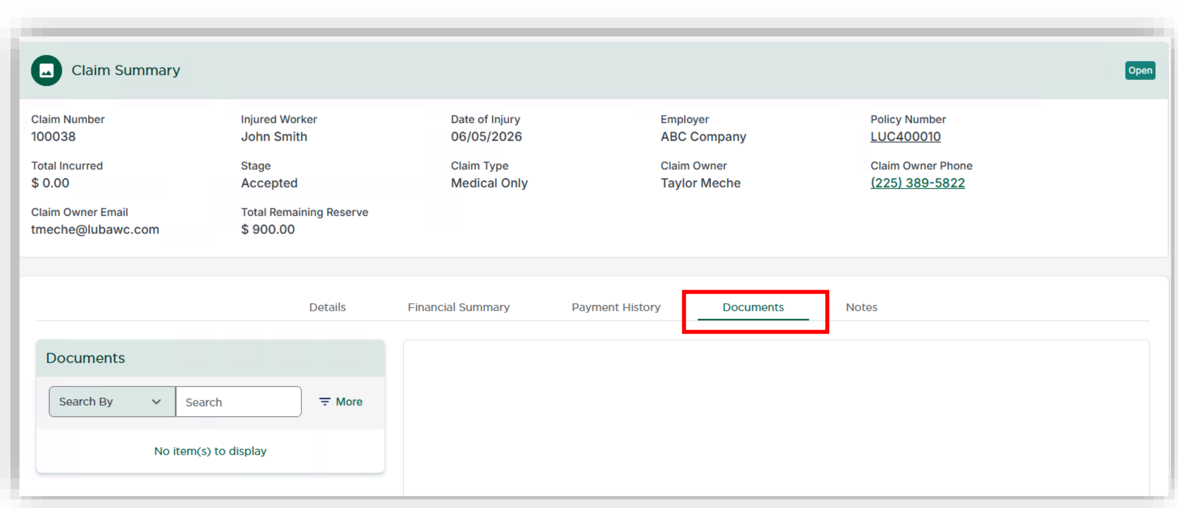
Category:

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)

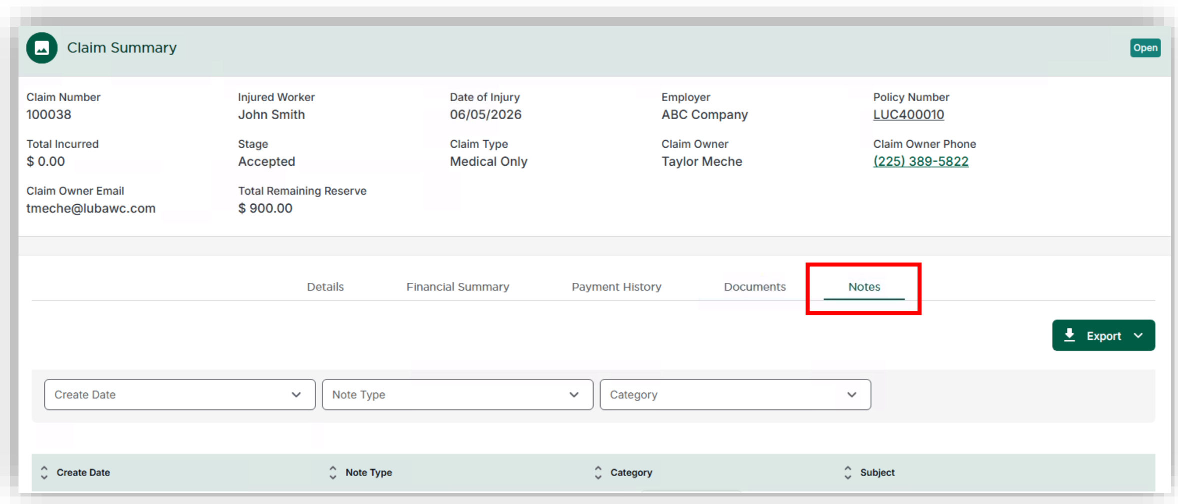
Documents Section

The **Documents Section** contains documents related to the selected Policy. Search by Document Name, Reference Number, or Created Date. You may also filter by Category and Document Source or sort results.



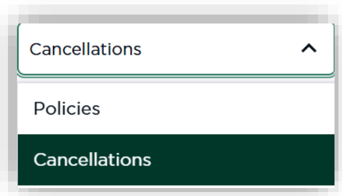
Notes Section

Contains **Notes Section** related to the Policy selected. Filter by Date Created, Note Type, or Category. You may also export any notes by selecting the *Export* button.



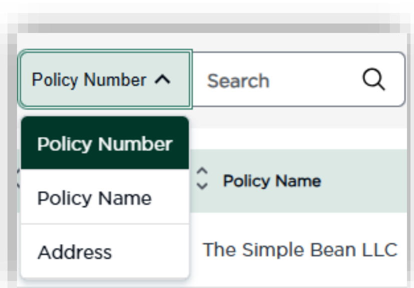
Cancellations

The **Cancellations Section** allows users to manage and review Policies that are pending Cancellation. 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



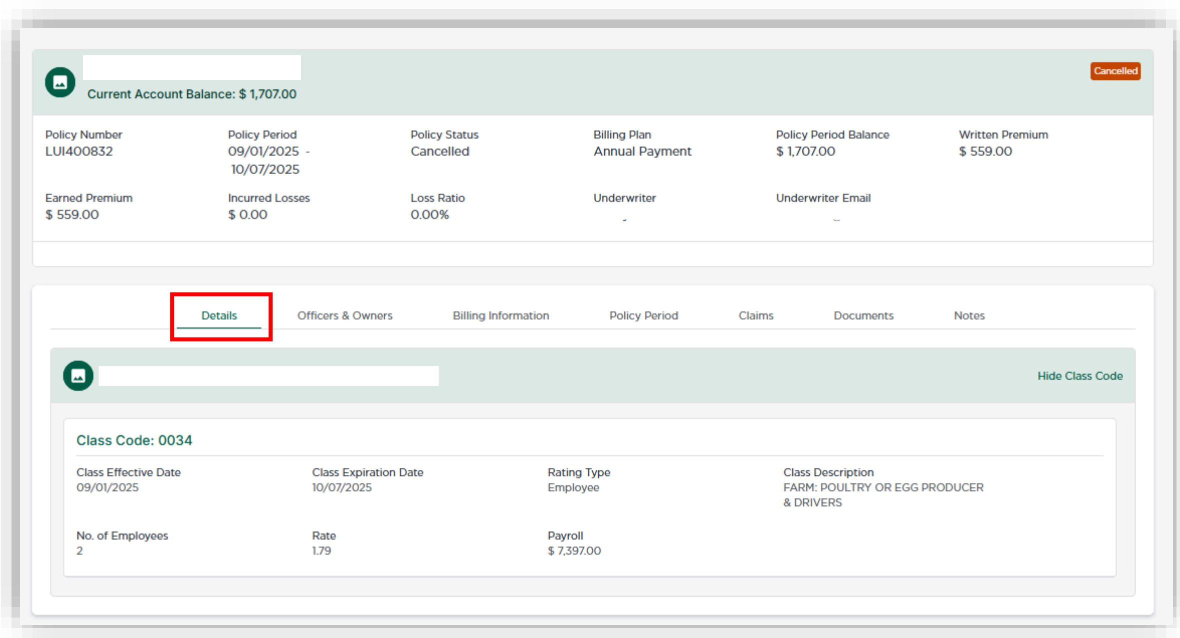
To refine searches, you can apply the following filters:

- **Cancellation Date:** Specify a date range to search for Cancellations that occurred within that timeframe
- **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 Reason:** Choose from predefined reasons for cancellation (e.g., Non-Payment, Policy Expiration) to filter results

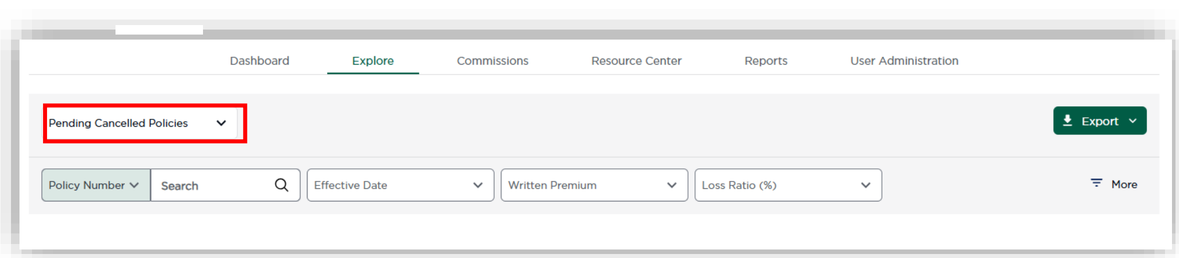
Viewing Cancellation Details

Once a Cancellation is selected, you can view detailed information, including information about the Policy associated with the Cancellation, such as its Loss Ratio and Premium Amounts. Detailed notes on why the Policy was canceled, if available, 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.



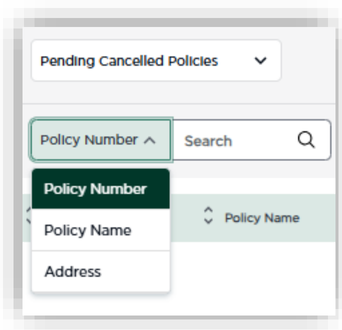
Pending Cancelled Policies

The **Pending Cancelled Policies Section** displays detailed information regarding individual policies that are up for cancellation.



You may search for a specific policy using the following criteria:

- **Policy Number:** Enter the unique policy number to locate a specific policy quickly
- **Policy Name:** Input the name of the policy
- **Address:** Enter the address listed on the policy



Effective Date

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

- **Last 30 Days**: Select this option to view results for items that became effective within the last 30 days
- **Last 60 Days:** Use this to filter results for items effective in the last 60 days
- **Last 90 Days:** Choose this option to see items that became effective within the last 90 days
- **Custom Date Range**: Select this option to specify a custom range:
    - **From:** Enter the start date in the format MM/DD/YYYY
    - **To**: Enter the end date in the same format to filter results based on your selected date range

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

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

Cancellation Date

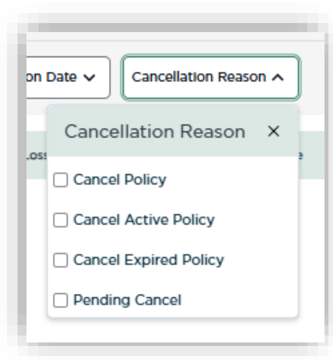
To filter by *Cancellation Date*, utilize the following options:

- **Next 30 Days:** View items set to be canceled within the upcoming 30 days
- **Next 60 Days**: See items scheduled for cancellation in the next 60 days
- **Next 90 Days:** Access information on cancellations expected within the next 90 days
- **Custom Date Range: From** - [Input Field for Start Date]. **To -** [Input Field for End Date]

Cancellation Reason

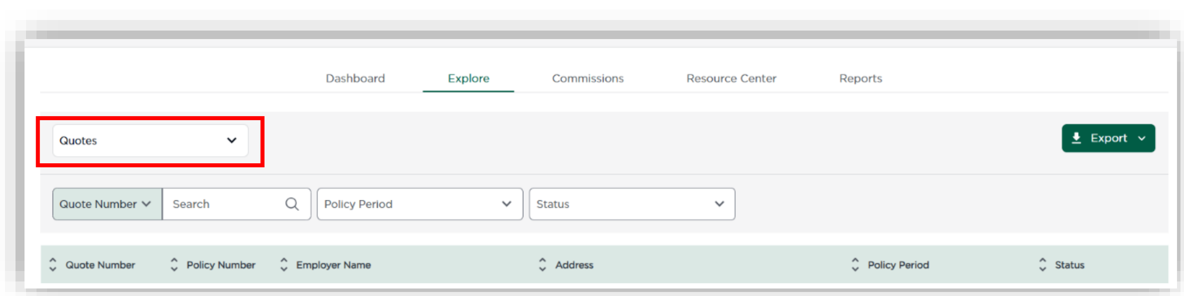
To filter by *Cancellation Reason*, utilize the following options:

- **Cancel Policy**: Select this option to filter results for policies that have been fully canceled
- **Cancel Active Policy:** Use this to view only those policies that were active at the time of cancellation
- **Cancel Expired Policy:** Choose this option to filter for policies that were previously active but have since expired and have been canceled
- **Pending Cancel:** Select this to display policies that are currently in the process of cancellation but have not yet been finalized



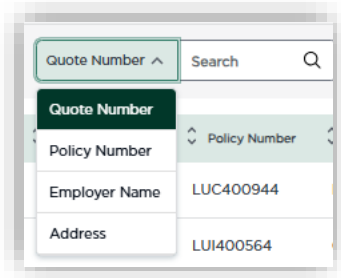
Quotes Section

The **Quotes Section** provides a comprehensive view of all quotes generated within the system.



You may search for specific quotes using the following criteria:

- **Quote Number**: This option enables users to quickly find specific quotes by entering the quote number
- **Policy Period**: This option enables users to look for quotes based on specific policy periods, enhancing the ability to manage and track quotes effectively
- **Policyholder Name**: This option enables users to search for quotes based on the policyholder associated with the policy
- **Address**: This option enables users to search for quotes linked to specific addresses



Policy Period

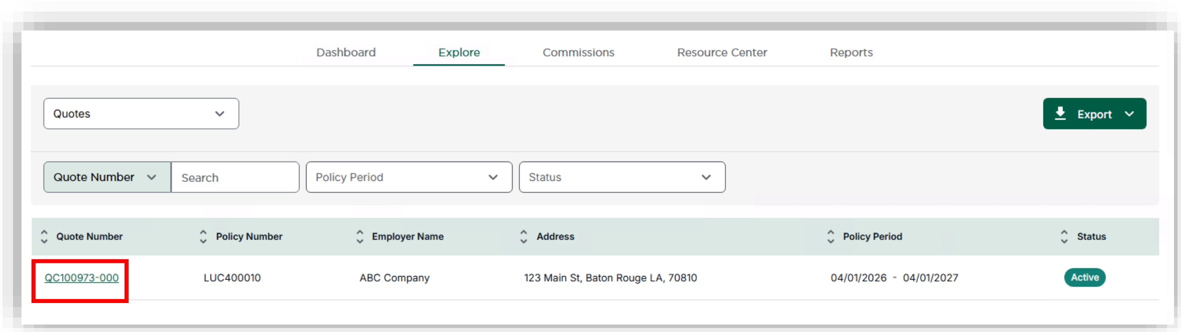
To filter by *Policy Period*, utilize the following options:

- **Last 30 Days:** This filter allows users to view quotes and policies that have been active or created within the past 30 days
- **Last 60 Days:** Selecting this option expands the search to include quotes from the last 60 days
- **Last 90 Days:** This filter provides access to quotes from the last 90 days, allowing users to analyze trends or changes over a more extended period
- **Custom Date Range:** Users can specify a custom date range by entering a start date and an end date

Status

To filter by *Status*, utilize the following options provided: **Active, Bound, Closed, Cancelled, Declined, Declined/Closed, No Touch, Pending Authorization, Pending UW Approval, Quoted, Rejected, Submission, UW Approved, or Withdrawn.**

Select the Quote Number hyperlink to view more details.



Comprehensive quote and policy information will be displayed.

Quote Information

- **Quote Number**: Unique identifier for the quote
- **Policy Number**: Designation for tracking the policy
- **Policy Period**: Duration of coverage, ending on a specified date
- **Status**: Current state of the quote (e.g., Quoted)
- **Billing Plan**: Structure of payment, noted as multiple installments
- **Total Premium Amount**: Overall cost of the policy

Contact Information

- **Underwriter**: Individual responsible for the quote
- **Underwriter Email**: Contact information for inquiries

Financial Details

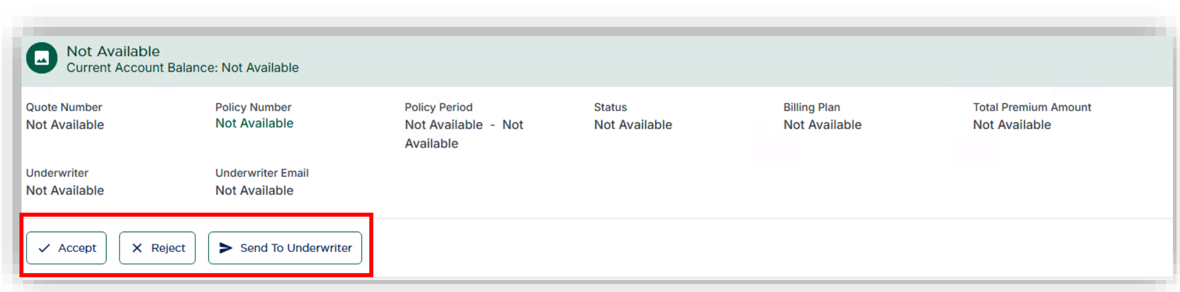
- **Estimated Annual Premium**: Projected yearly cost of the policy
- **Down Payment Amount**: Initial payment required to activate coverage

Coverage Areas

The quote includes coverage options for multiple states, each with the possibility of further details for specific coverage terms.

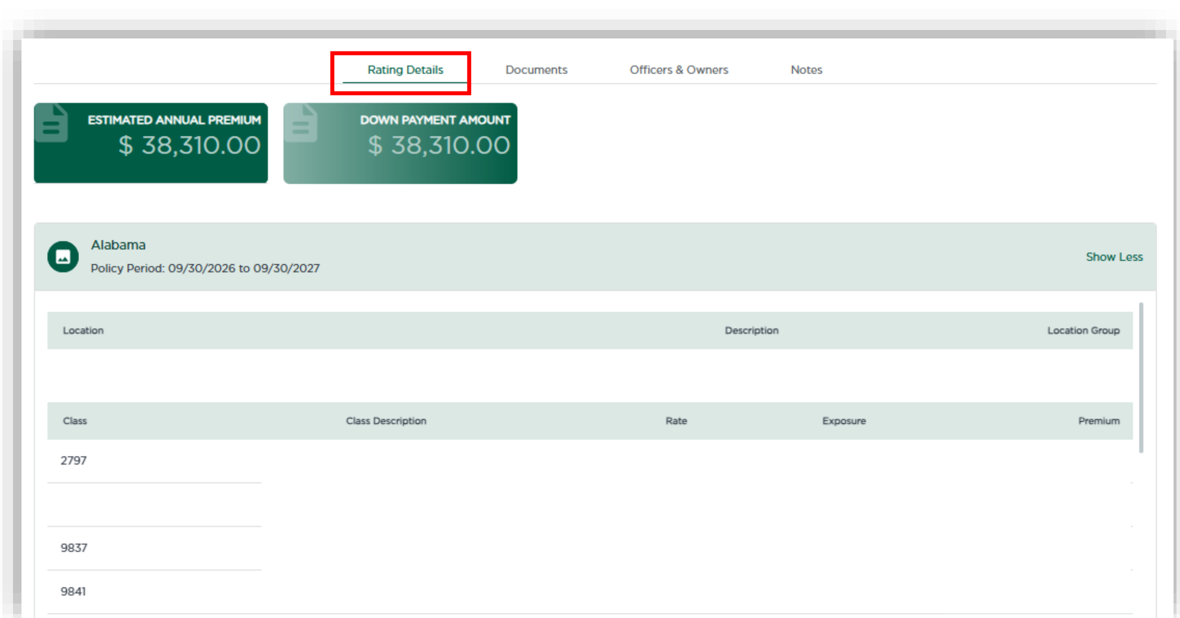
Actions Available

- **Accept**: Option to approve the quote and initiate the policy
- **Send to Underwriter**: Option to forward the quote for additional review



Rating Details

The Rating Details section displays a summary window highlighting the estimated premium, down payment, and specific coverage options with associated costs. Select "Show More" to view more rating details.

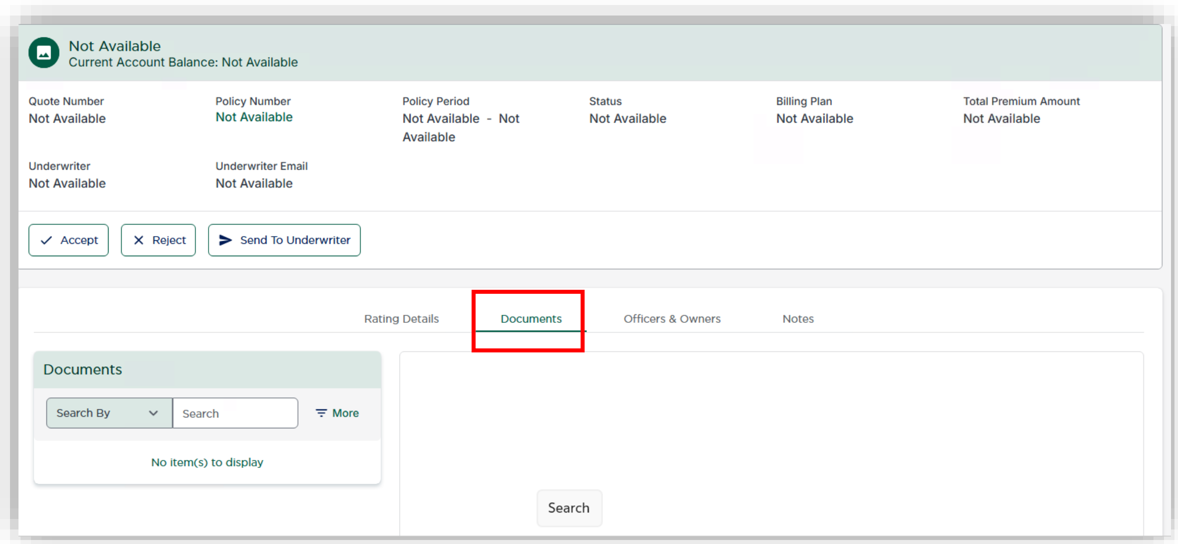


Documents

The Document Section displays the details of a quoted insurance policy. The policy is associated with a specific business entity and includes a designated plan for installment payments. The quote reflects a total premium amount for the upcoming policy period.

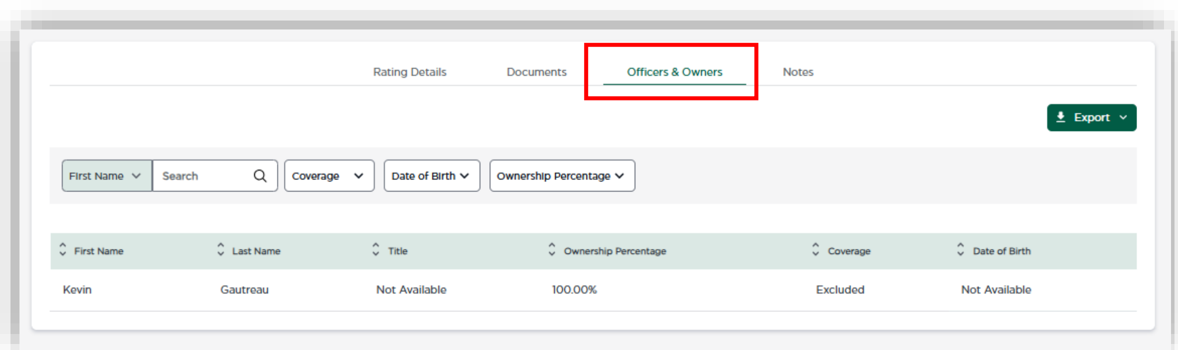
The Documents Section also includes the following:

- **Quote Status**: The policy is currently quoted and awaiting acceptance
- **Policy Duration**: The effective period extends for one year
- **Document Availability**: Relevant documents related to coverage acceptance and other important information are accessible



Officers & Owners

The Officers and Owners Section allows users to search by First Name, Last Name, or Title.



<u>Coverage</u>

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

- **Included:** Selecting this option will display only those owners/officers that are included
- **Excluded:** Selecting this option will display only those owners/officers that are excluded

Date of Birth

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

- **Last 30 Years:** This option filters results to include individuals born within the last 30 years
- **Last 60 Years:** This option filters results to include individuals born within the last 60 years
- **Last 90 Years:** This option filters results to include individuals born within the last 90 years
- **Custom Date Range:** Users can specify a custom date range

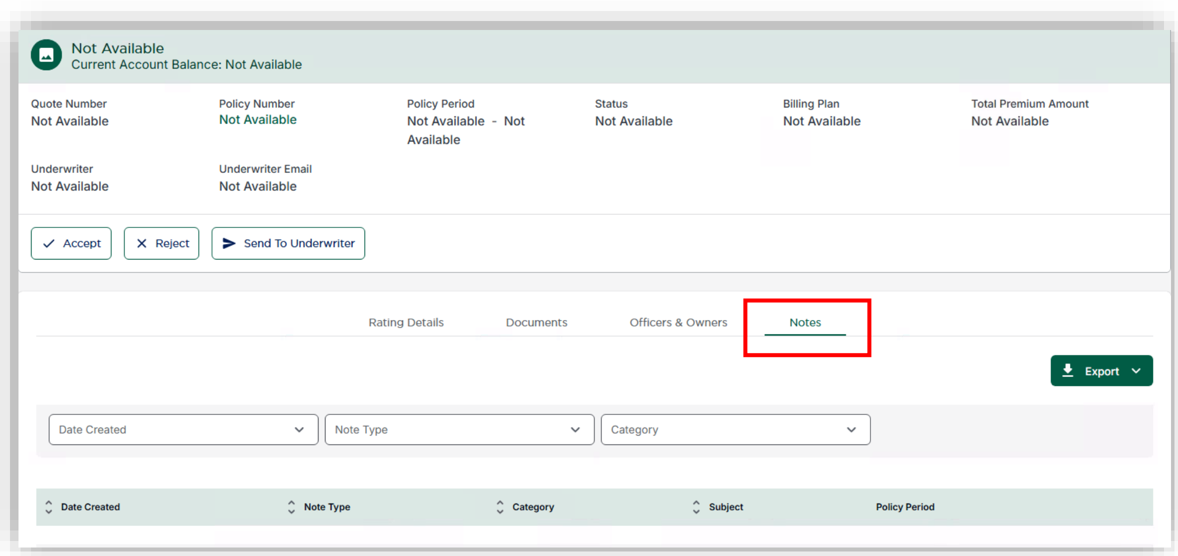
Ownership Percentage

To filter by *Ownership Percentage*, utilize the following options:

- **Ownership Percentage:** Enter a numerical value in both the From and To boxes provided
- **Exact Percentage:** Enter an exact value in the field provided

Notes

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



Date Created:

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

- **Last 30 Days:** This filter allows users to view quotes and policies that have been created within the past 30 days
- **Last 60 Days:** Selecting this option expands the search to include quotes created in the last 60 days
- **Last 90 Days:** This filter provides access to quotes created in the last 90 days
- **Custom Date Range:** Users can specify a custom date range by entering a start date and an end date

Note Type:

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

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

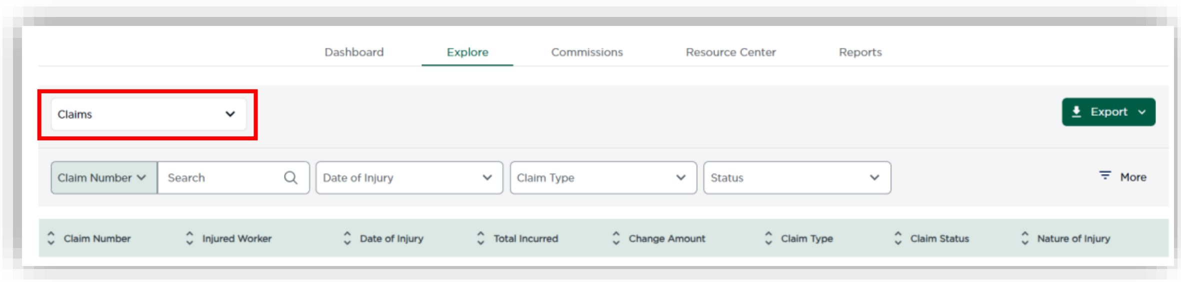
Category:

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

- Utilize the drop-down menu to filter Notes based on their *Category* (e.g., Account Receivables, Account Holder, or Audit)

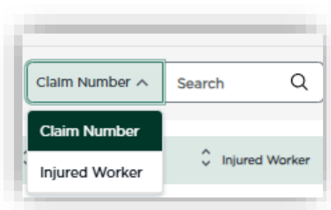
Claims Section

The **Claims Section** displays detailed information regarding individual claims filed under quotes. 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



Date of Injury

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

- **Last 30 Days:** This filter allows users to view injuries within the past 30 days
- **Last 60 Days:** This filter allows users to view injuries within the past 60 days
- **Last 90 Days:** This filter allows users to view injuries within the past 90 days
- **Custom Date Range:** Users can specify a custom date range

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., Incident, Indemnity, or Medical Only) to filter Claims based on their classification

Status

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

- **Closed:** Select this option to filter claims that have been fully processed and closed
- **Incomplete:** Select this option to filter claims that are currently incomplete
- **Open:** Select this option to filter claims that are currently open and under review

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

Change Amount

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

- **Amount Range:** Enter a range of change 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 change amount

Nature of Injury

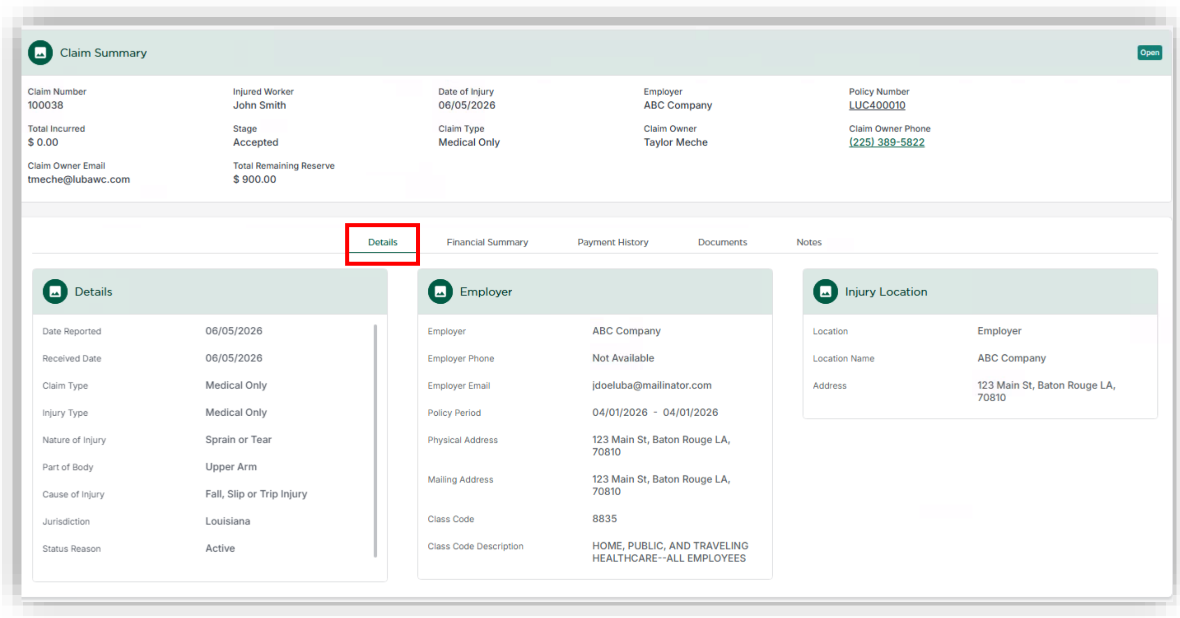
To filter by *Nature of Injury*, utilize the following options:

- **Predefined Types:** Select from the drop-down menu of Predefined Nature of Injury Types (e.g., Adverse Reaction to Vaccination or Inoculation or Burn) to filter claims based on their classification

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:

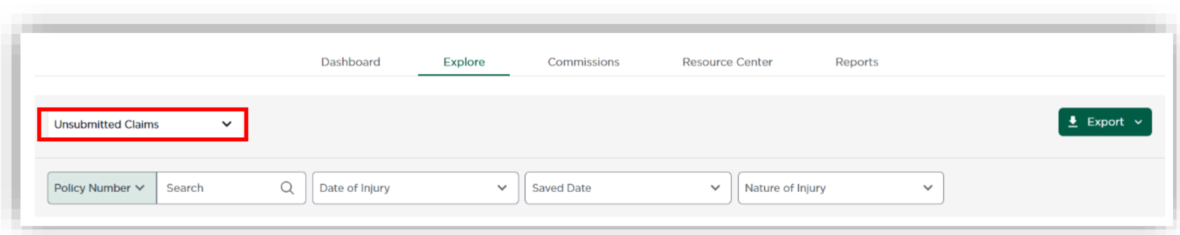
- **Date Reported:** The date when the Claim was reported
- **Received Date:** The date when the Claim was received by the insurer
- **Injury Type:** Categorization of the injury (e.g., Minor, Major)
- **Nature of Injury:** Description of the nature of the injury based on specific classifications
- **Part 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



This section also shows **Policyholder Information** as well as **Injury Location** details. You may also view claim sections such as Financial Summary, Payment History, Documents, or Notes. Refer to the section above, “Claims Summary,” for more detailed information on these sections.

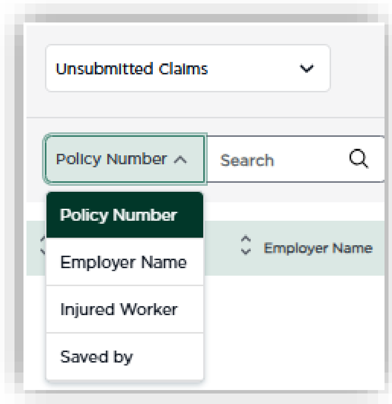
Unsubmitted Claims Section

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

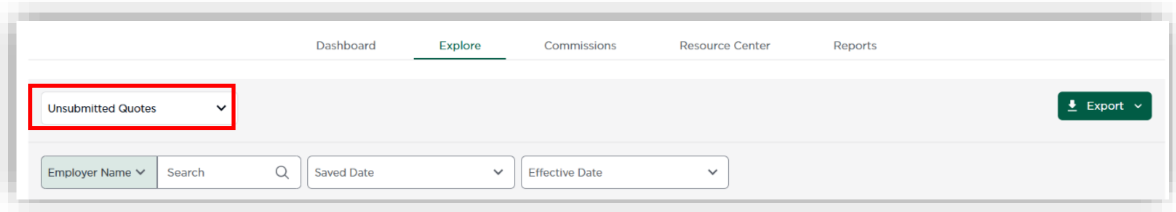
Saved Date
To filter by *Saved Date*, utilize the following options:

- **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
- **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.

Unsubmitted Quotes Section

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



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

- **Policyholder Name**: Input the name of the policyholder to locate unsubmitted quotes tied to that Agent
- **Saved By**: Identify who saved the unsubmitted quote, allowing for efficient tracking of claim entries
- **Address:** Input the address associated with the quote to search by address criteria

<u>Saved Date</u>

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

- **Last 30 Days:** This filter allows agents to view unsubmitted quotes saved within the past 30 days
- **Last 60 Days:** This filter allows agents to view unsubmitted quotes saved within the past 60 days
- **Last 90 Days:** This filter allows agents to view unsubmitted quotes saved within the past 90 days
- **Custom Date Range:** Agents can specify a custom saved date range by entering a start date and an end date

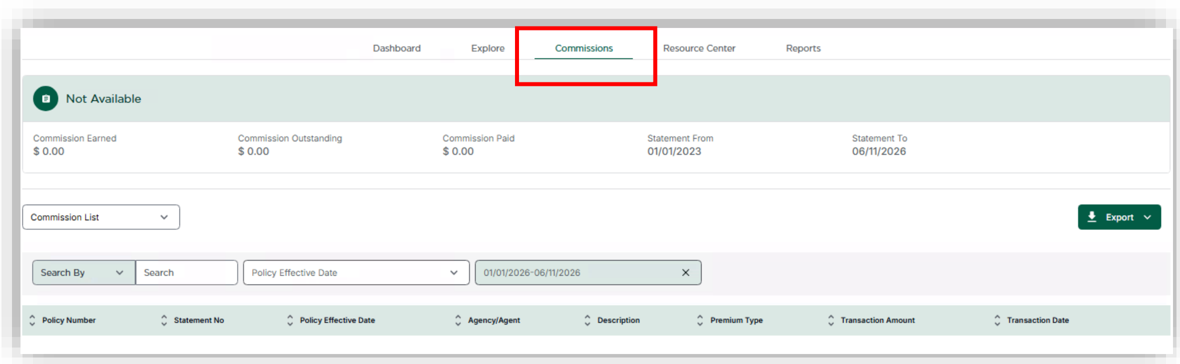
<u>Effective Date</u>

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

- **Last 30 Days:** This filter allows agents to view effective dates within the past 30 days
- **Last 60 Days:** This filter allows agents to view effective dates within the past 60 days
- **Last 90 Days:** This filter allows agents to view effective dates within the past 90 days
- **Custom Date Range:** Agents can specify a custom effective date by entering a start date and an end date

Commissions Tab

The **Commissions Tab** provides a summary of an agent's commissions.

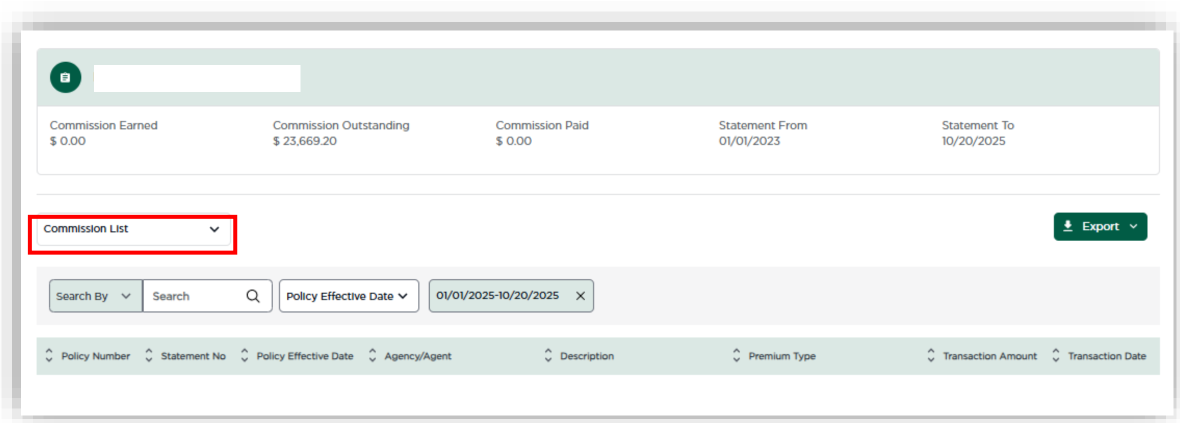


Commission Summary Section:

- **Commission Earned**: Indicates the total commissions earned to date
- **Commission Outstanding:** Represents the commissions that are yet to be paid or processed
- **Commission Paid:** Shows the total commissions that have been paid out so far
- **Statement From/To:** This date signifies the period for which the commission details are reported

Select "Export" to download the commission data for further analysis or reporting.

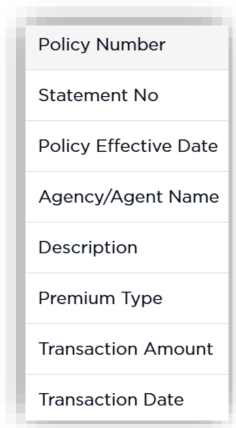
Commission List



You may search the Commission List using the following criteria:

- **Policy Number:** Agents can search for commissions linked to a specific policy by entering the unique policy number
- **Statement Number:** This option allows for searching by the statement identification number
- **Policy Effective Date:** Agents can filter results based on the date when the policy became effective, helping to narrow down searches to relevant timeframes

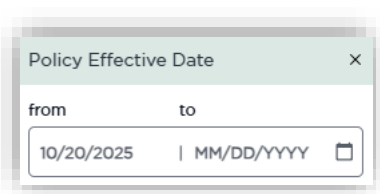
- **Agent/Agency Name:** This criterion enables agents to search for commissions related to a specific agent or Agency
- **Description:** Agents can search for specific descriptions related to the commission transactions
- **Premium Type:** This option lets agents filter results based on the type of premium involved, such as annual or monthly premiums
- **Transaction Amount:** Agents can search for commissions based on the amount of the transaction
- **Transaction Date:** This allows for filtering results by the date the transaction occurred



Policy Effective Date

To filter by *Policy Effective Date*, utilize the following options:

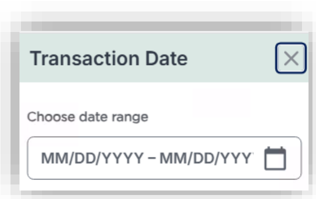
- **Date Range:** Enter a range of Policy Effective Dates in the From/To boxes to filter based on dates related to the claim



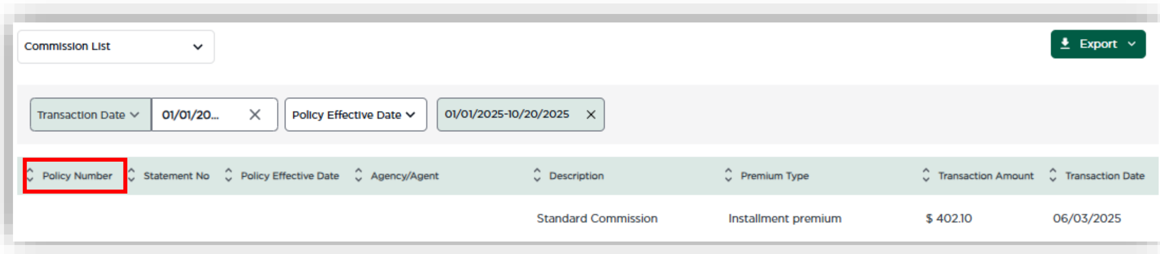
Transaction Date

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

- **Date Range:** Choose a date range, of Transaction Dates in the box provided to filter based on dates related to the claim



Select the Policy Number hyperlink to view additional commissions details related to the policy.

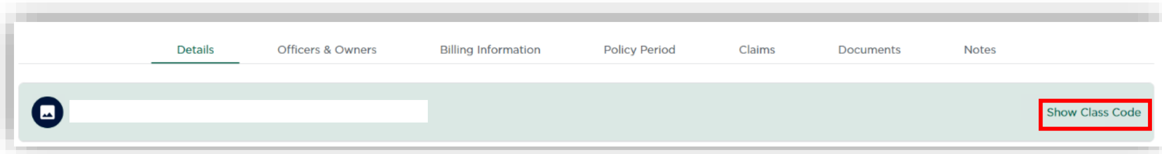


Account Information:

- Displays the current account balance prominently, providing an overview of the financial status
- Includes the policy number and effective date, indicating the timeline of the policy
- Shows billing details, including the frequency of payments and the associated premium type
- Provides a contact email for inquiries, ensuring easy communication

Details:

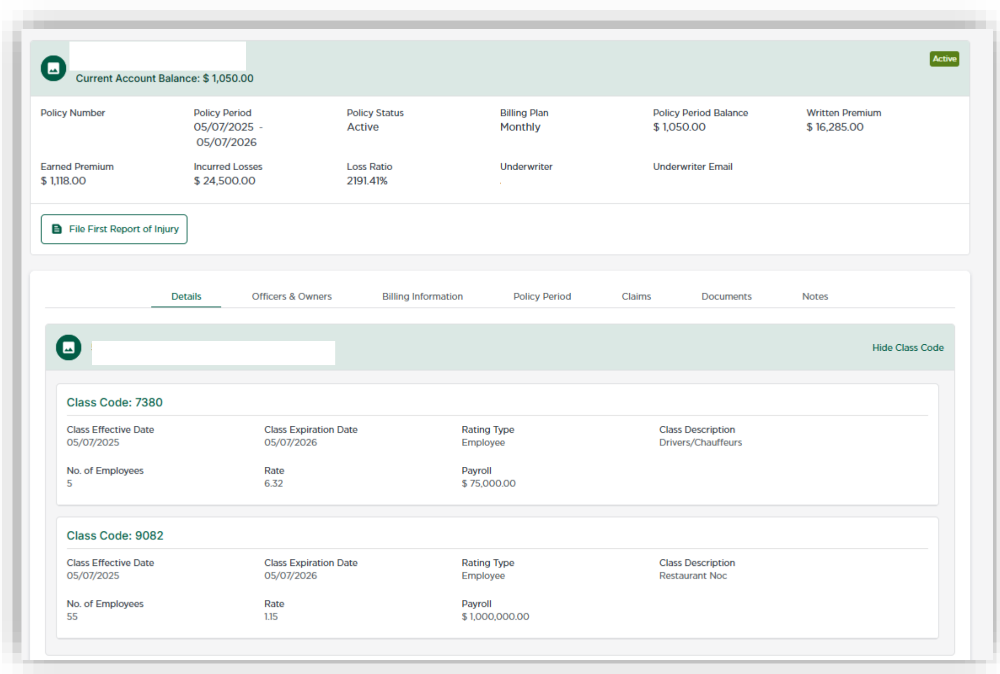
- Contains address information, including the street, city, and postal code, clearly laid out for easy reference. Select "Class Codes" to display more detailed information.



A drop-down screen will appear with the following information:

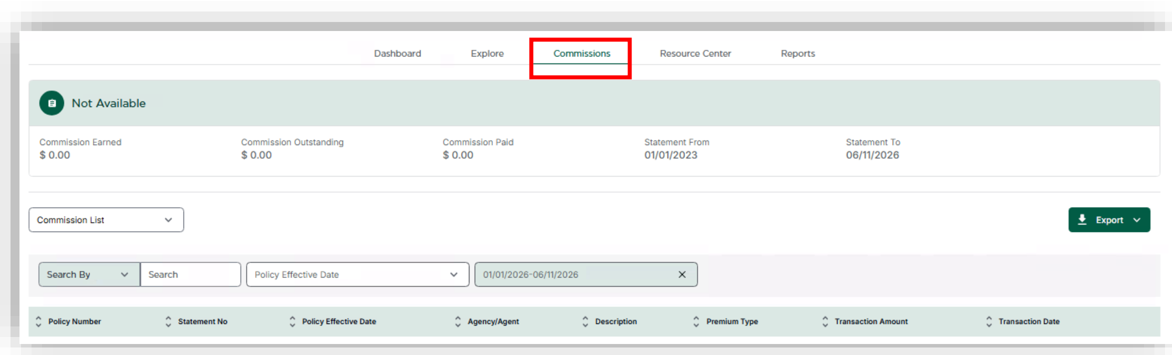
- Related class codes, each with details such as effective dates, expiration dates, and ratings
- Information on the number of employees associated with each class code, aiding in risk assessment and classification

The Commission List also provides insight into the Officers & Owners Tab, Billing Information Tab, Policy Period Tab, Claims Tab, Documents Tab, and Notes Tab. Visit the Explore Tab section earlier in this document for more detailed information.

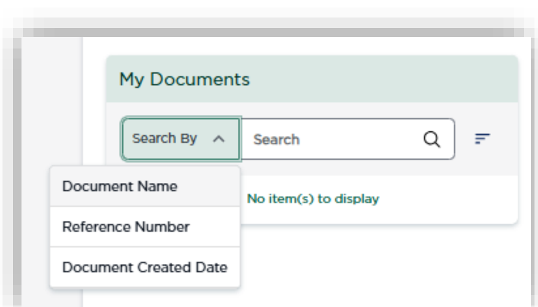


Commission Documents

The Commission Documents Section contains all documents related to an agent's commissions. The section contains three major categories Commission Earned, Commission Outstanding, and Commission Paid.



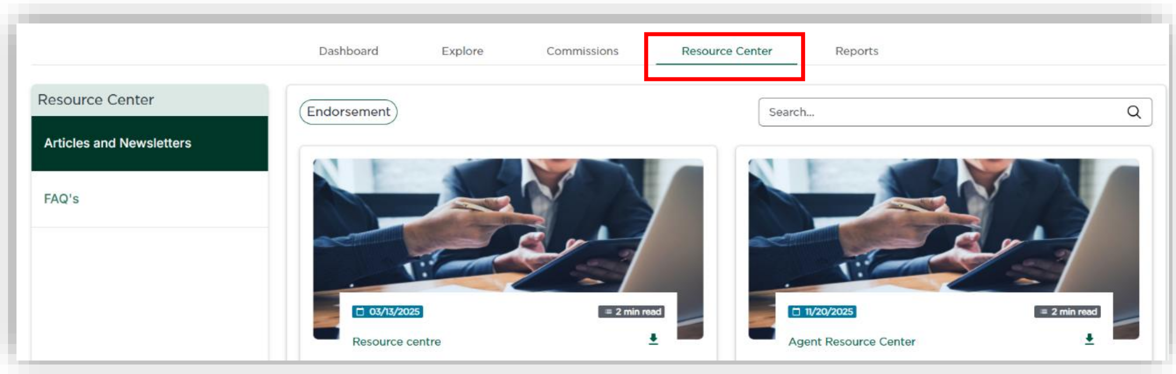
The Commission Documents Section allows agents to search by the following options: Document Name, Reference Number, or Document Created Date.



Resource Center

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

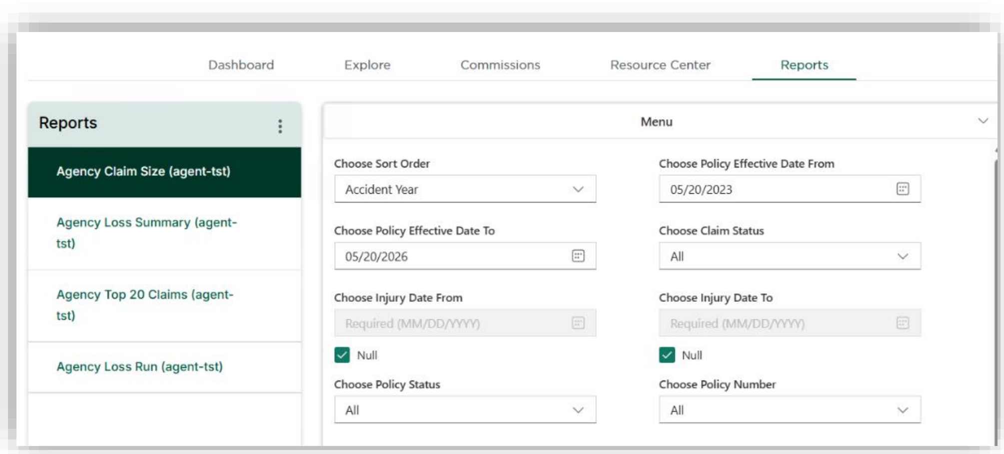
- **Help Guides**: Access user manuals to help with common issues.
- **Contact Support**: Information on how to reach customer support for further assistance.
- **Articles and Newsletters**: Related articles and newsletters.
- **FAQ's**: Common questions and answers related to the LUBA Connect portal.



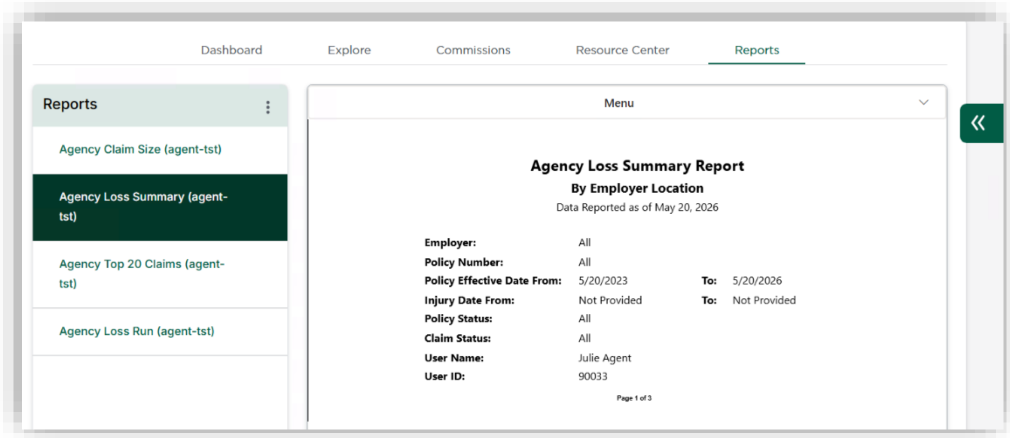
Reports

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

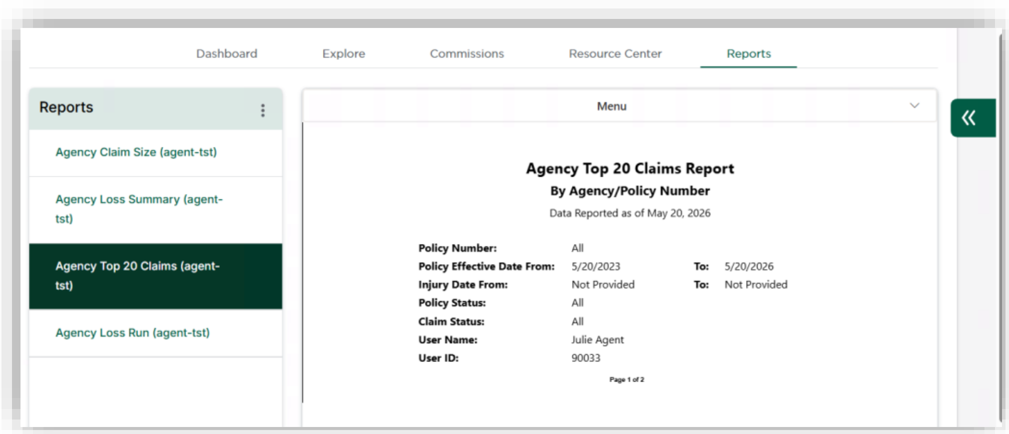
- **Available Reports**: Access a variety of reports including:
  - **Agency Claim Size:** Provides insight into the size and distribution of claims across your agency.



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



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



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