LUBA Connect

Policyholder User Guide

LUBA WORKERS' COMP.
A CASUALTY INSURANCE COMPANY

Table of Contents

Getting Started 3
- Accessing the LUBA Connect Portal 3
- Self-Registration 4
- Registered Profiles 4

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

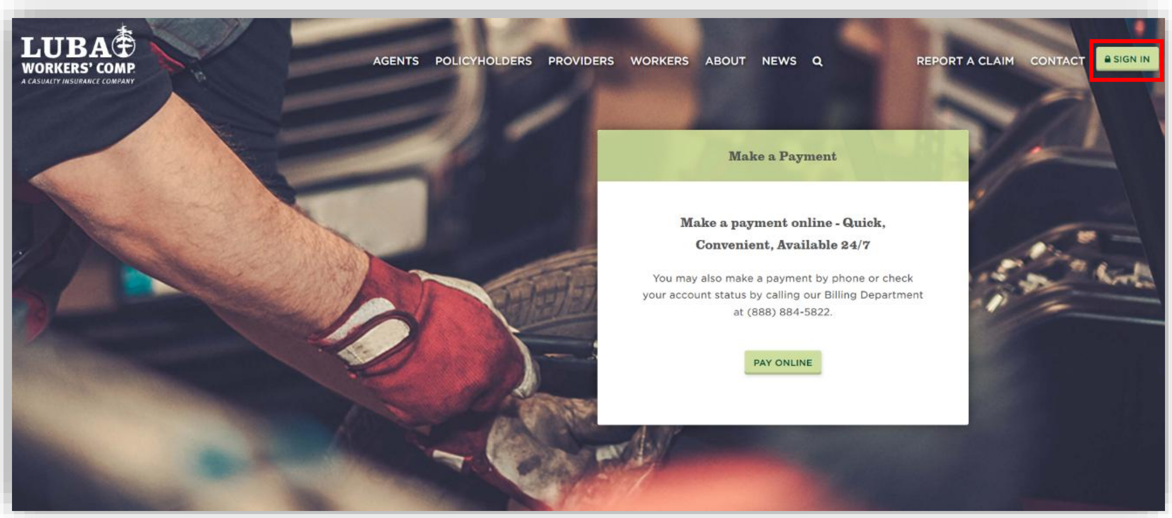
Resource Center 41

Getting Started

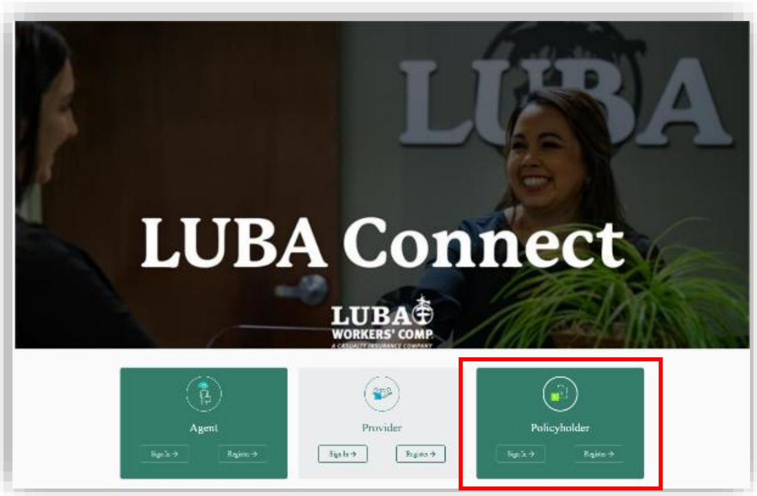
Accessing the LUBA Connect Portal

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".



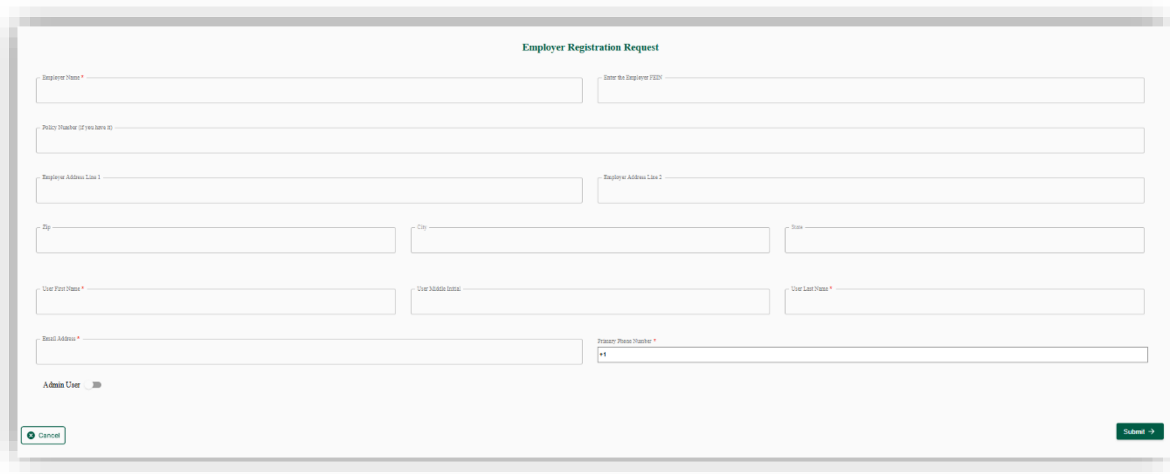
After selecting "Sign In", the following screen will appear. Select the Policyholder profile and select "Sign In" to LUBA Connect.



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 the upgraded LUBA Connect portal, please complete self-registration first.

Self-Registration

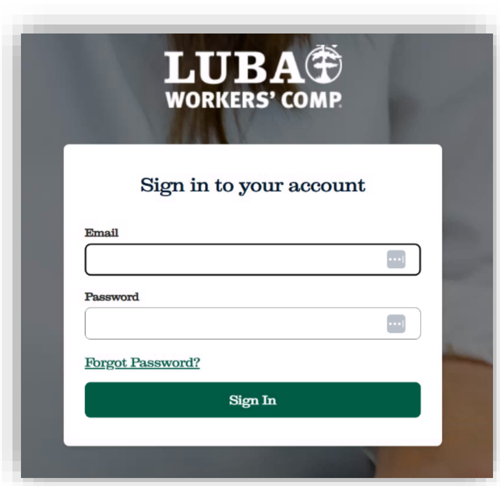
To complete self-registration, enter the requested information in the form shown below.



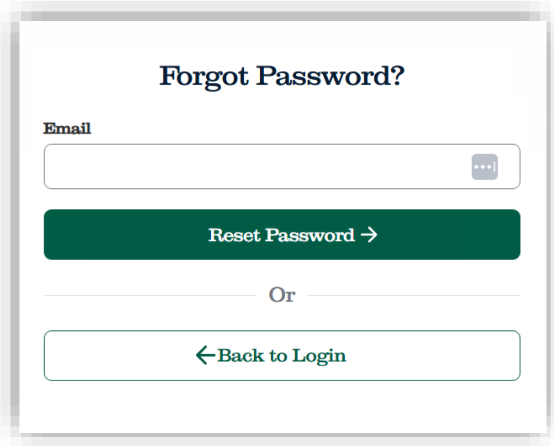
Once you have completed self-registration, select the Submit button. Your registration information will be directed to LUBA, who will review your request. **Please note, it can take up to 2-3 business days for registration requests to be approved.** If there are any issues with your request, LUBA personnel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

Registered Profiles

Once you have received new credentials, select the Policyholder 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?"

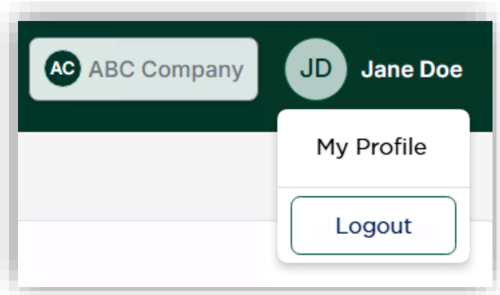


The following screen will appear prompting you to enter your email. Select the button labeled "Reset Password" and instructions will be sent.



Profile

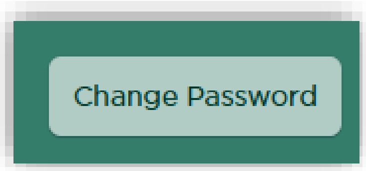
Navigate to the **Profile Section** on the top right of the screen to manage your account settings and personal information.



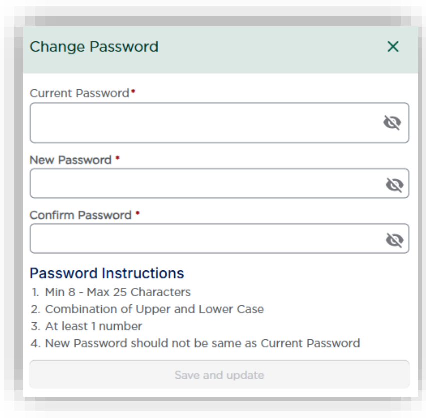
Change Password

To change your password, follow these steps:

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

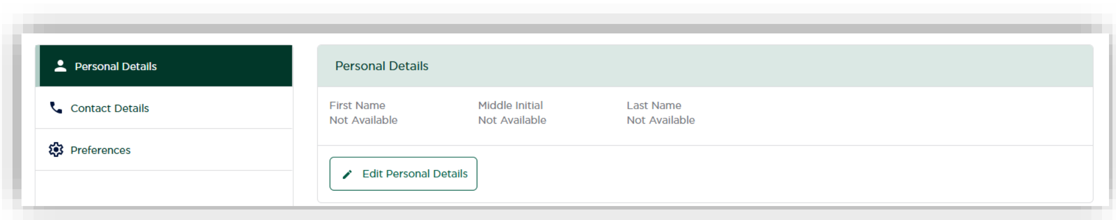


3. Enter your current password in the first field.
4. Type your new password in the next field. Ensure it meets the required criteria, which may include a combination of uppercase letters, lowercase letters, numbers, and special characters.
5. Re-enter your new password in the **Confirm Password** box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



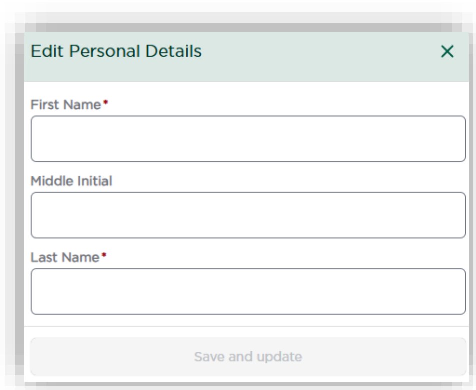
Personal Details

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



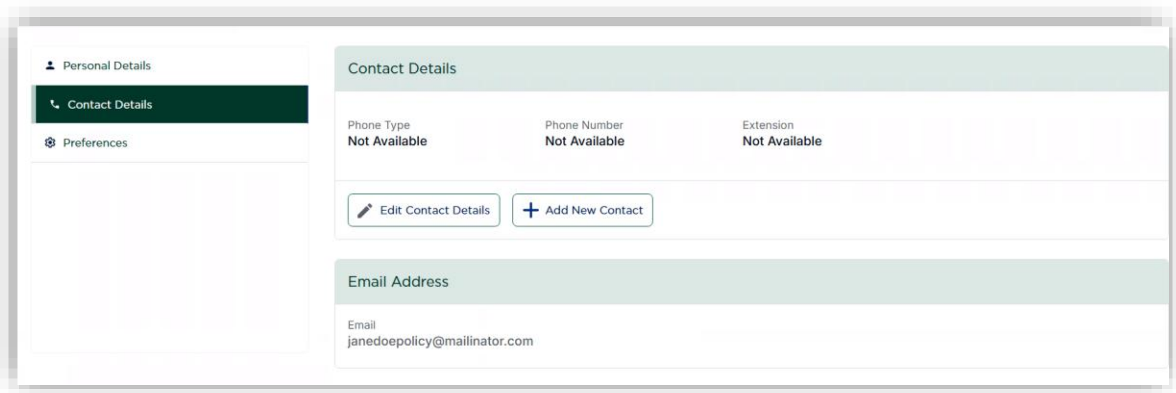
To edit your Personal Details, follow the steps below:

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

Add New Contact:

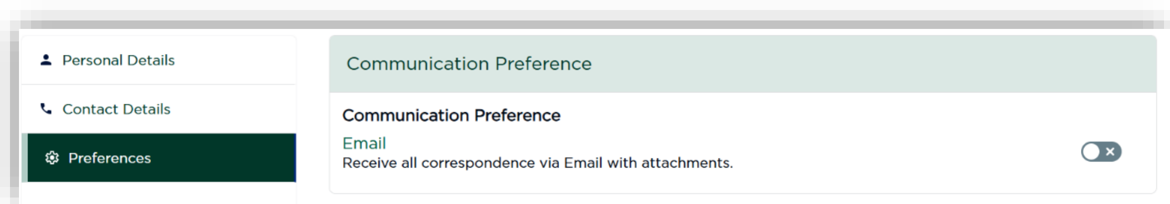
1. Select *More* and then the *Add New Contact* button.
2. Fill in the required fields such as Name, Email, Phone Number, and Role.
3. Select "Submit" to add the new contact.

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.



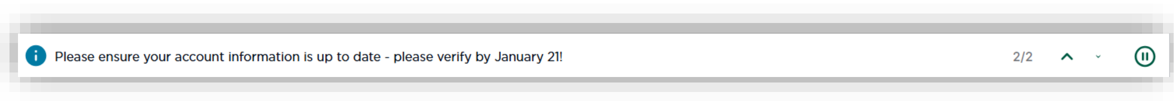
Follow the steps below to set your notification preferences:

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

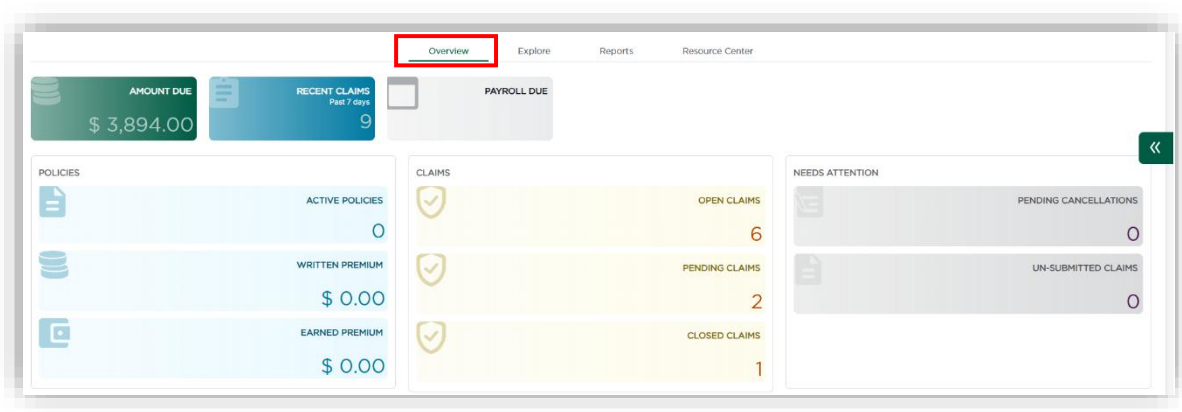
Notifications Banner

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

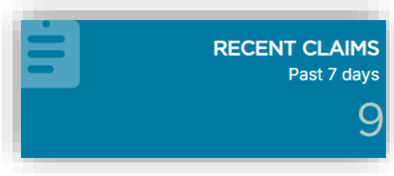
Claims

- 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

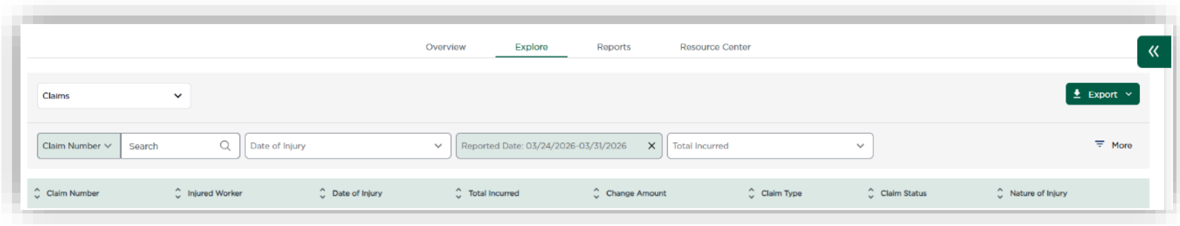
Needs Attention

- 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.

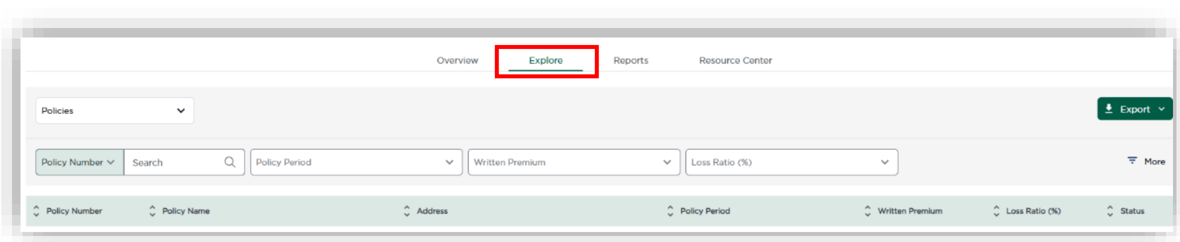


Selecting this box will direct you to the Claims Screen and filter by those Claims within the date range of seven days.



Explore Tab

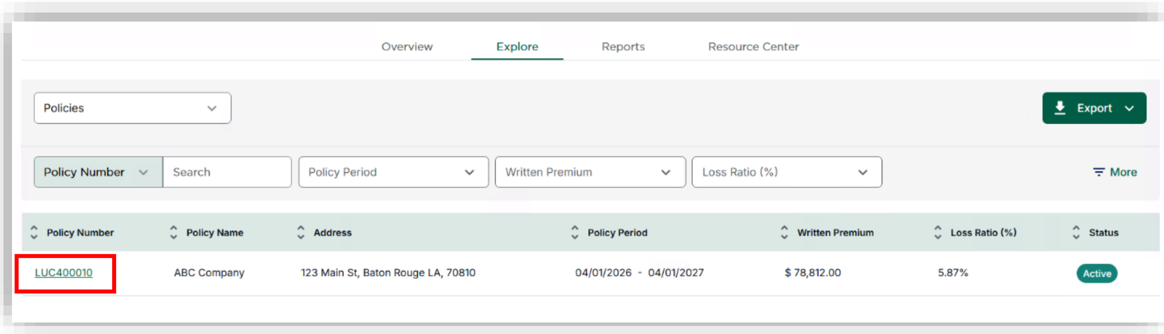
The **Explore Tab** on the Dashboard allows a detailed look at your information. Users can filter and search for data within the following categories: **Policies, Cancellations, Claims,** and **Unsubmitted Claims**. Refer to the individual sections below for instructions on navigating each.



Policies

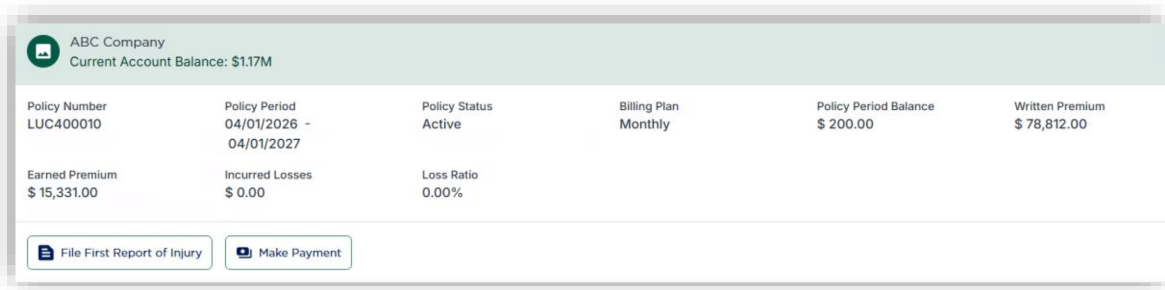
Utilize the drop-down menu to select “Policies” to view the Policy Section.

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.



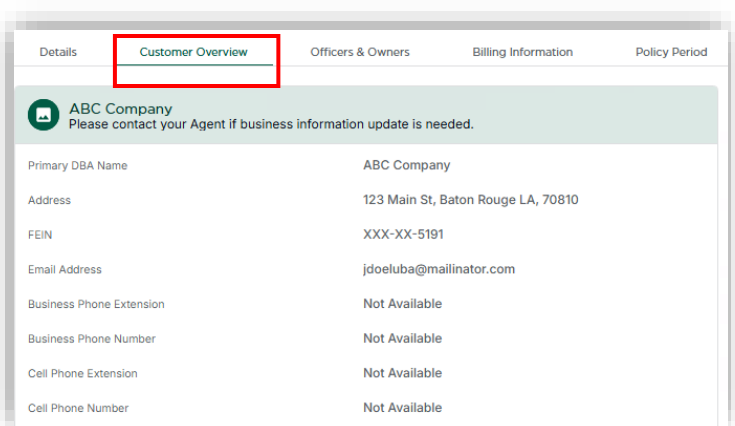
Details Section

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.



Customer Overview Section

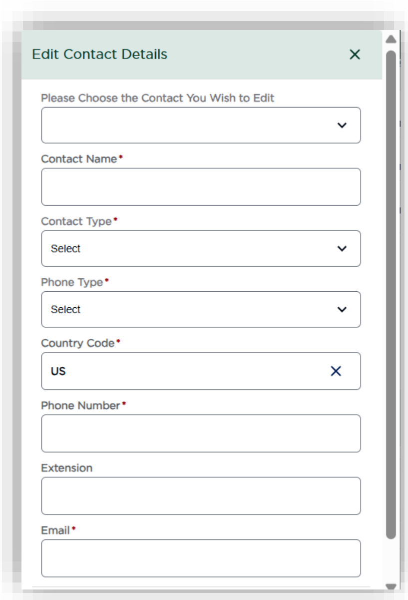
The **Customer Overview Section** shows a brief summary of customer information.



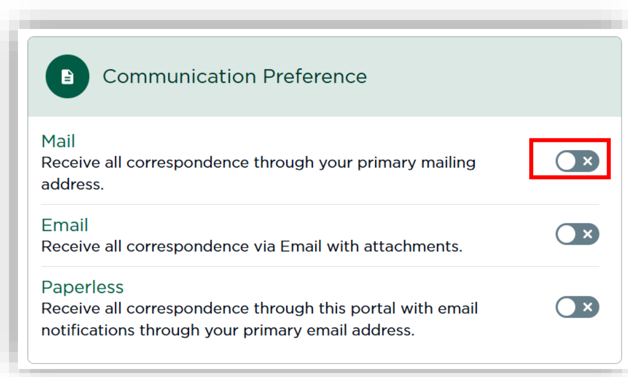
The following Information is included within section:

- Primary DBA Name
- Address
- FEIN
- Email Address

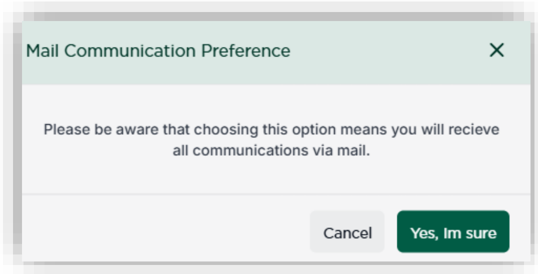
- Business Phone Extension
- Business Phone Number
- Cell Phone Extension
- Cell Phone Number
- Update
  - To update any of the above information, select “Update Contact”.” A pop-up window will display allowing you to enter new information. Select “Save and Update” to complete your update.



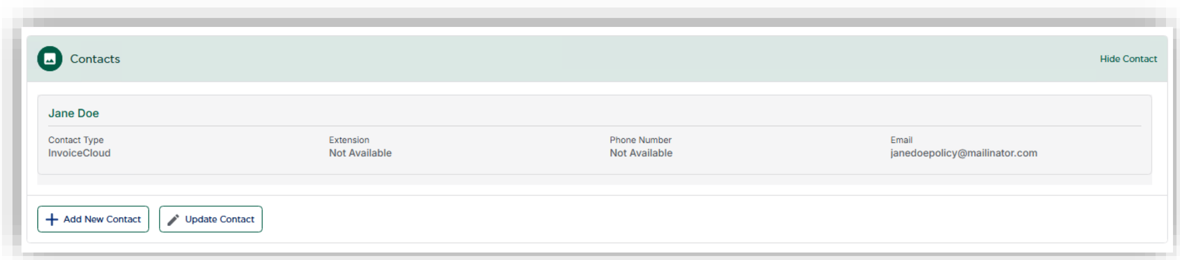
- Communication Preference
  - To edit your current **Communication Preferences**, toggle the buttons ON or OFF



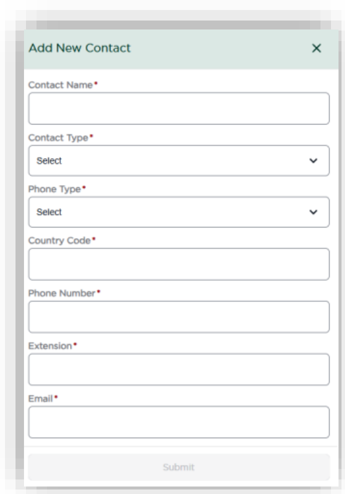
Once a button has been toggled, a pop-up window will appear notifying you of the change in your Communication Preference. You may select “Cancel” to return to the previous screen, or select “*Yes, I’m sure”* to accept the change.



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

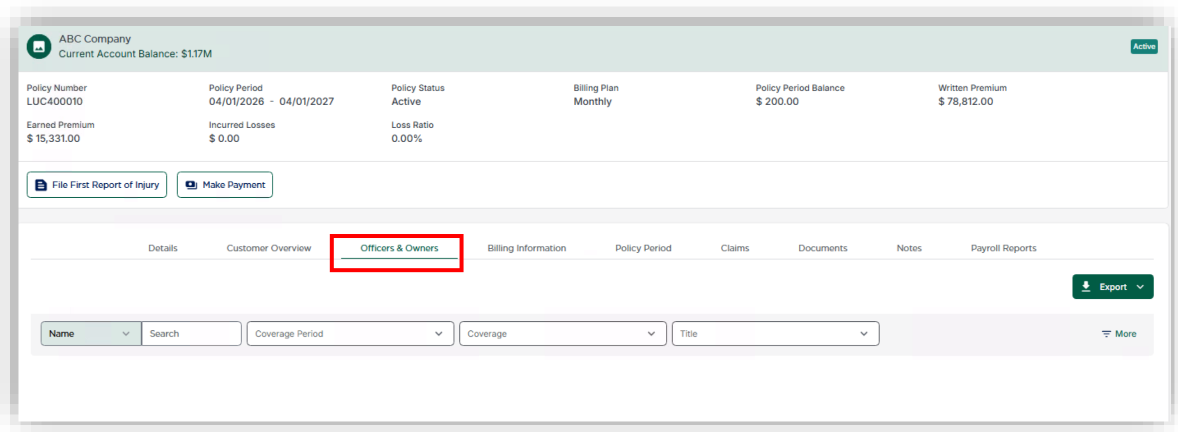


If you wish to enter a new contact, select the *Add New Contact* button. A pop-up window will appear. Please complete the fields and select *Submit*.

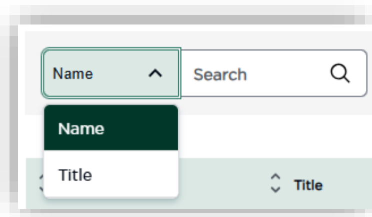


Owners & Officers Section

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.

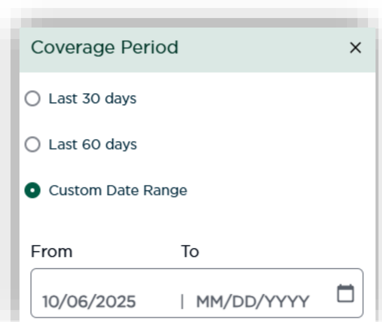


This section also enables you to search for specific Owners or Officers by Name or Title. Enter the Name or Title in the search bar provided to display results.



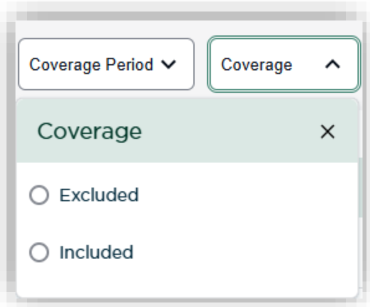
Coverage Period

- 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

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



Title

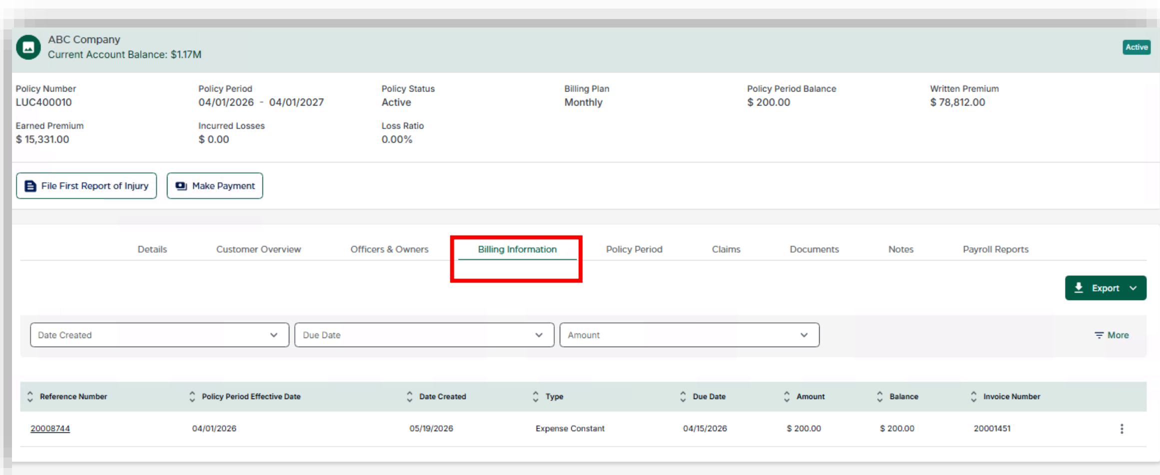
- To filter by **Title**, utilize the drop-down menu provided
- Select from the Title options shown

Ownership Percentage Range

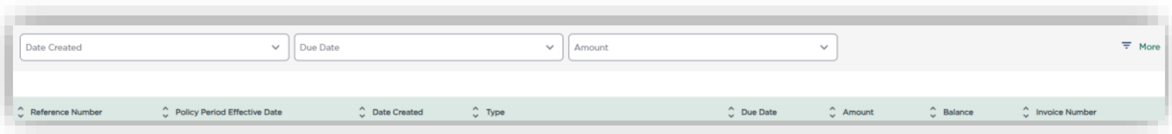
- To filter by *Ownership Percentage Rate,* utilize the drop-down menu provided located under the “More” button
- **Ownership Percentage Range:** Enter a numerical value both the From and To boxes provided
- **Exact Percentage:** Enter an exact value in the field provided

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.

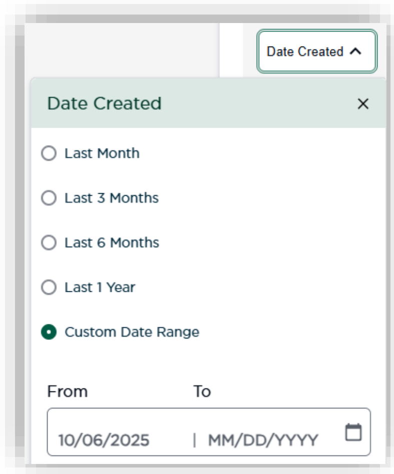


This section displays the Reference Number, Policy Period Effective Date, Date Created, Type, Due Date, Amount, Balance, and Invoice Number.



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



Due Date

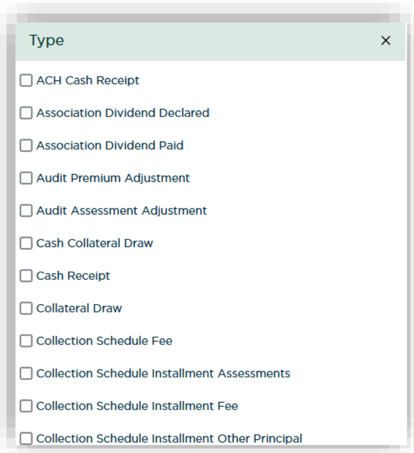
- To filter by *Due Date*, utilize the drop-down menu provided
- Select from the following options: Last Month, Last 3 Months, Last 6 Months, Last 1 Year, or by entering a Custom Date Range
- **Custom Date Range:** Enter From/To Dates in the boxes provided to filter by a custom date range

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

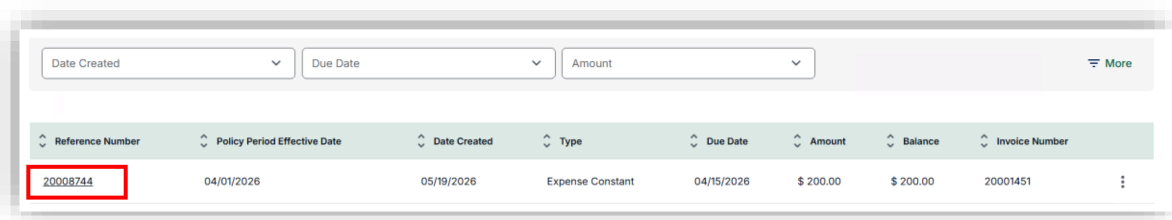
Type

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



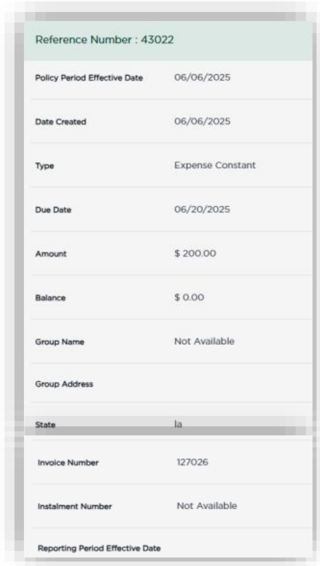
Reference Number

Select the **"Reference Number"** hyperlink to display detailed information.

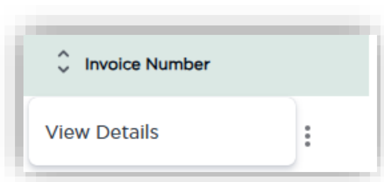


A pop-up window will appear with the following information:

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

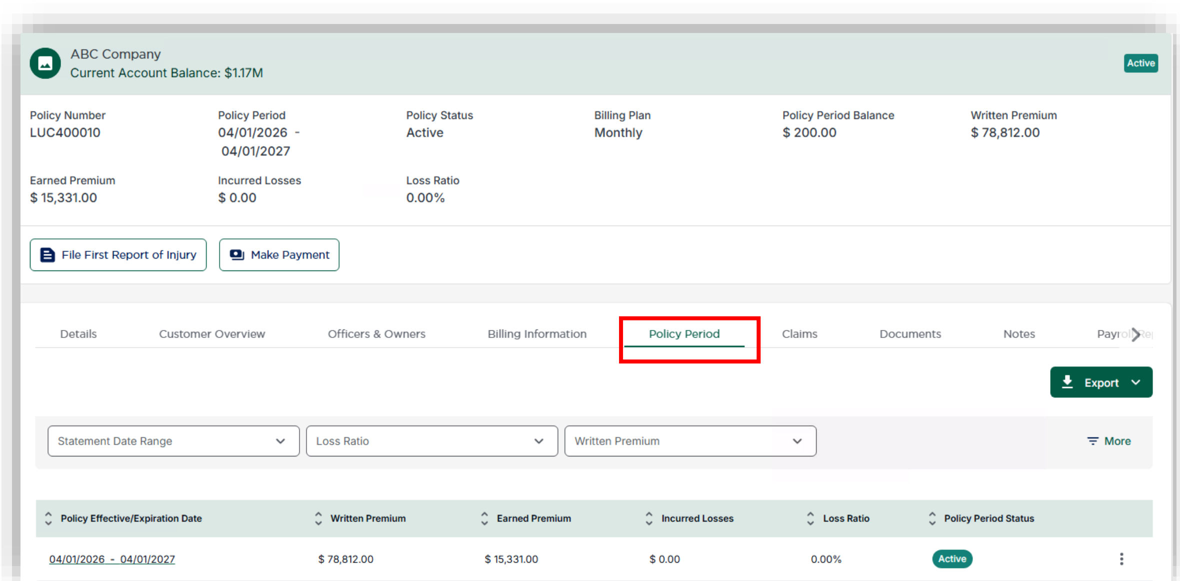


Alternatively, you may also view Billing Period details by selecting the three dots to the right of Invoice Number and selecting the "*View Details*" button. The same pop-up window showing Reference Number details depicted above will appear.



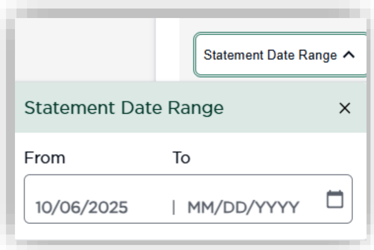
Policy Period Section

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

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

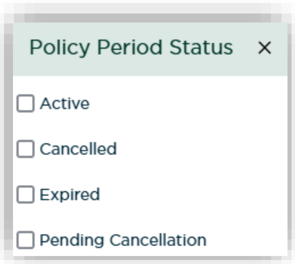
To filter by *Incurred Losses*, utilize the following options:

- **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

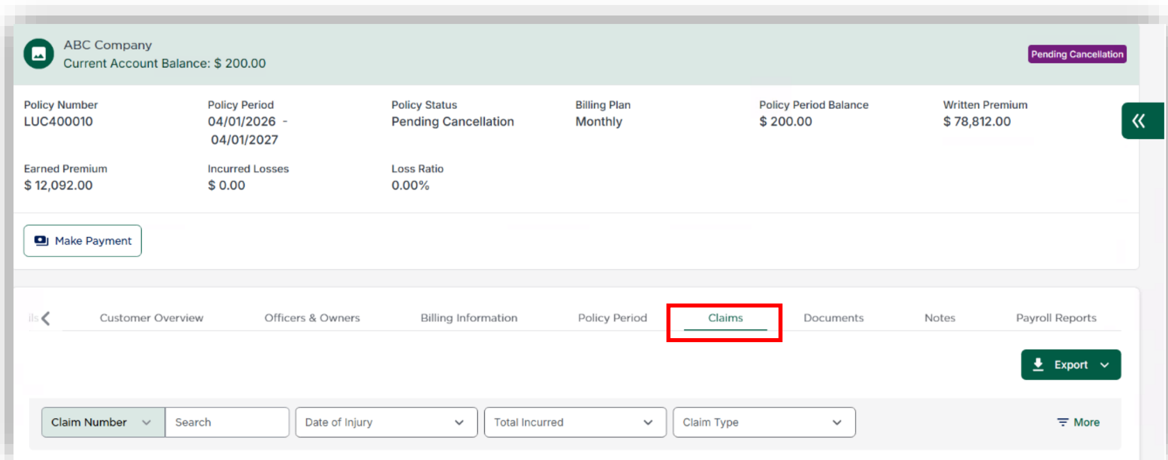
To filter by *Policy Period Status*, utilize the following options:

- **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

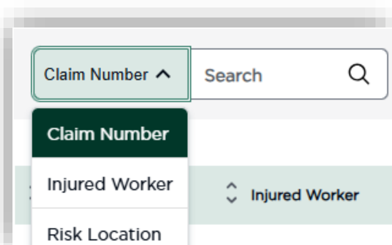


Claims

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.

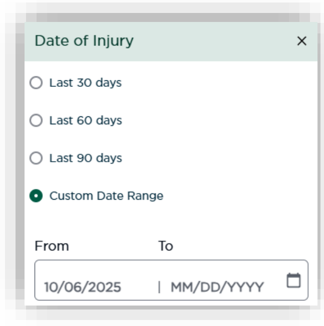


Utilize the drop-down menu provided to search by *Claim Number, Injured Worker*, or *Risk Location*.



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

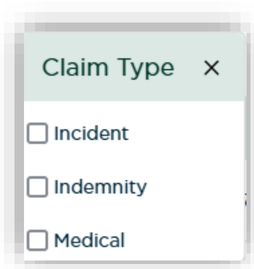


Total Incurred
To filter by *Total Incurred*, utilize the following options:

- **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:

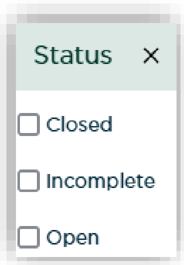
- **Predefined Types**: Select from the drop-down menu of predefined claim types (e.g., Workers' Compensation, Liability) to filter Claims based on their classification



Status

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

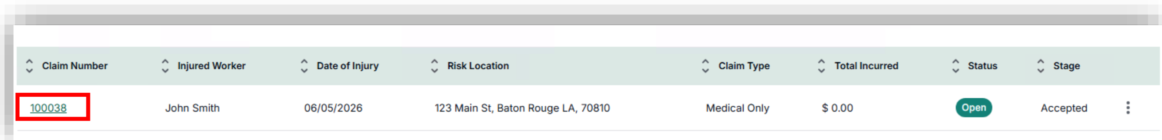
- **Closed:** Choose this option to filter Claims that have been fully processed and closed
- **Incomplete:** Select this option to filter Claims that are awaiting further action or resolution
- **Open:** Select this option to filter Claims that are currently open and under review

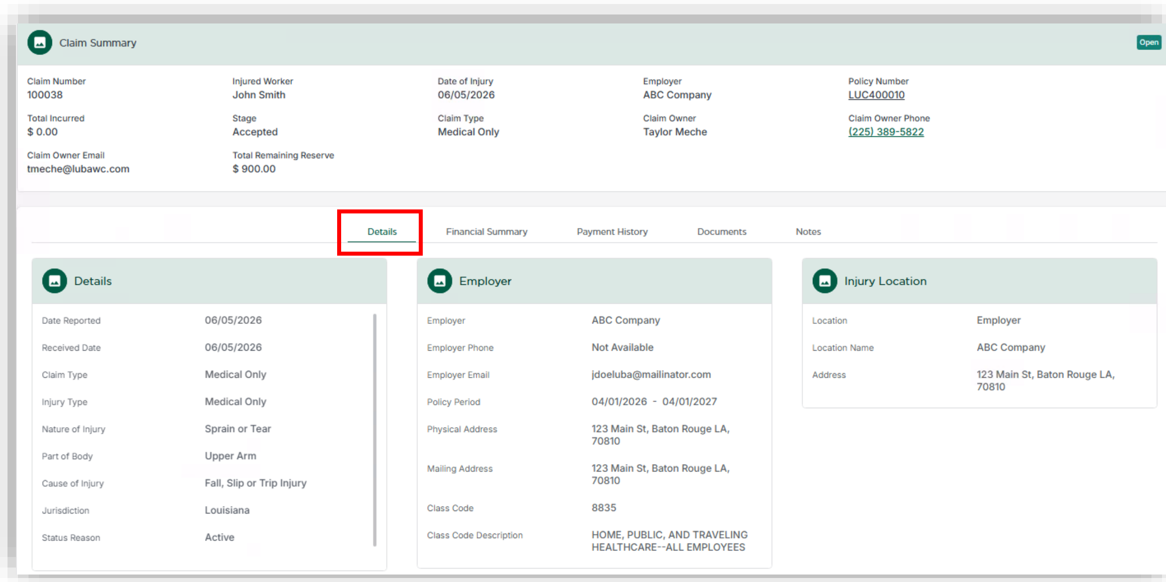


Stage

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.**

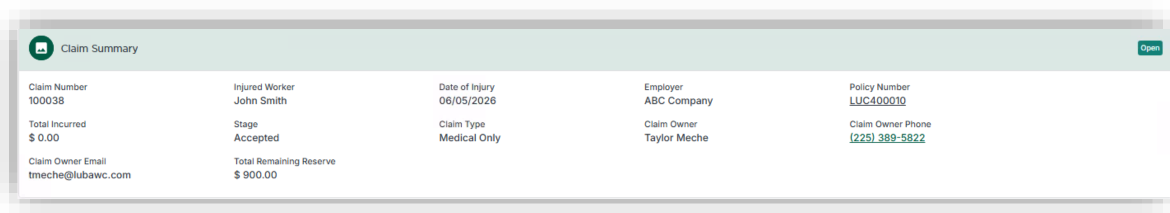
To view specific details within a Claim Number, select the numerical hyperlink to be directed to a new screen.





Claim Summary

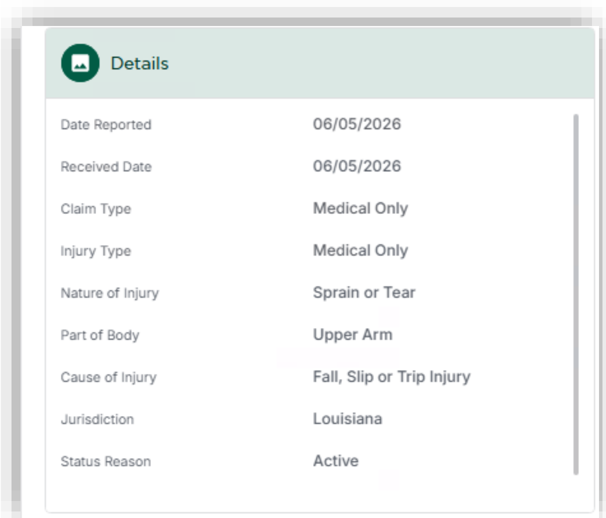
Input keywords related to the **Claim Summary** in the search bar to filter results based on specific terms found in the summaries.



Claim Details

The Claim Details Section provides the following information:

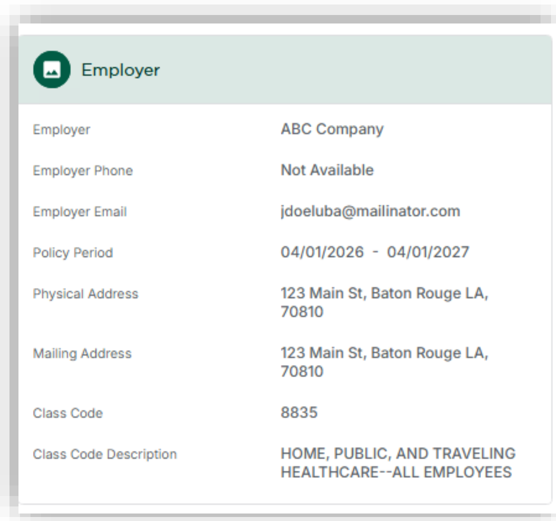
- **Date Reported:** Displays the date when Claims were reported
- **Received Date:** Displays the date when Claims were received
- **Injury Type:** Categorizes injury based on specific types of injuries (e.g., Minor, Major)
- **Nature of Injury:** Displays the Nature of Injury based upon specific injury 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



Policyholder Details

The Policyholder Details Section provides the following information:

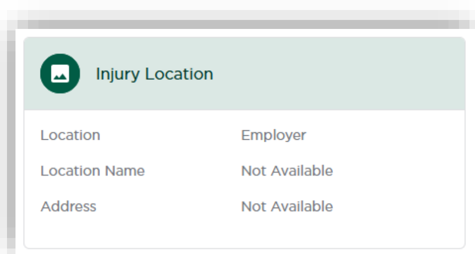
- **Policyholder Name:** Displays the Policyholder's Name
- **Policyholder Phone:** Displays the Policyholder's Phone Number
- **Policyholder Email:** Policyholder's Email
- **Policy Period:** Displays the Policy Period
- **Physical Address:** Policyholder's Physical Address
- **Mailing Address:** Policyholder's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



Injury Location

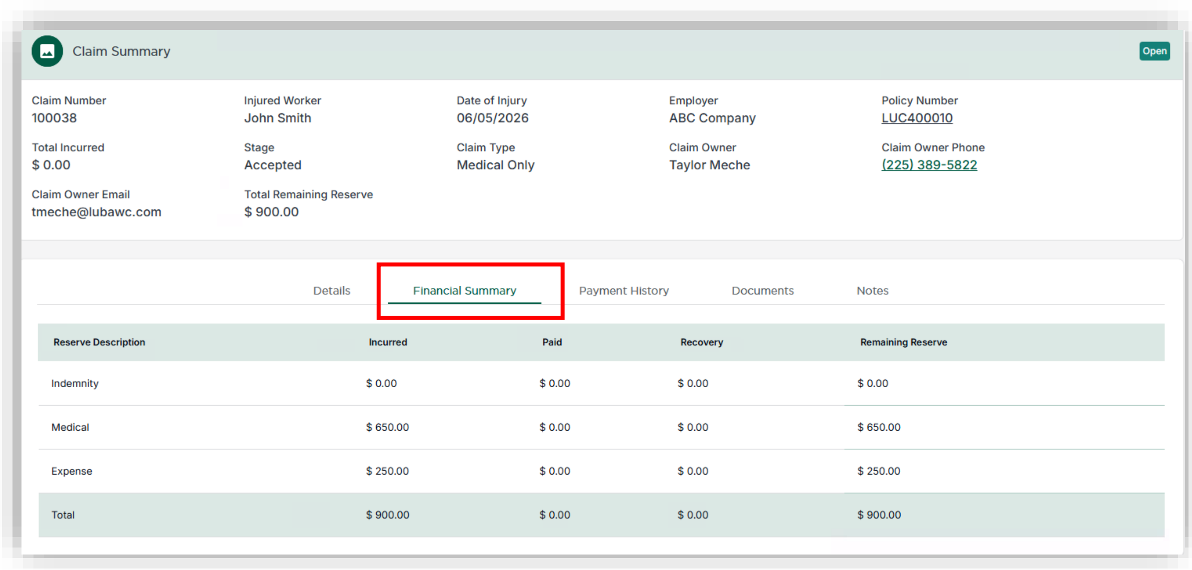
The Injury Location Section provides the following information:

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



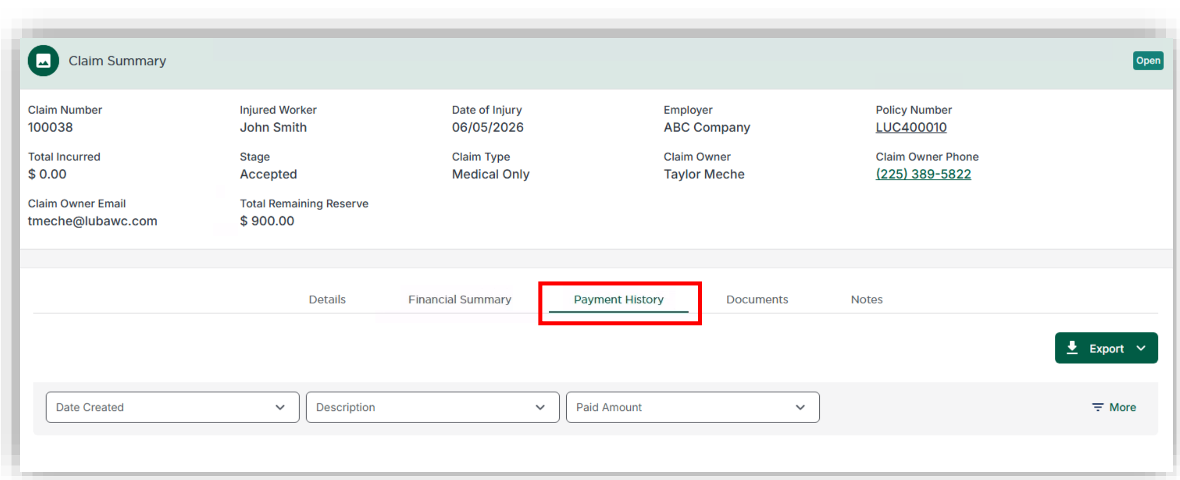
Financial Summary

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:

<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

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

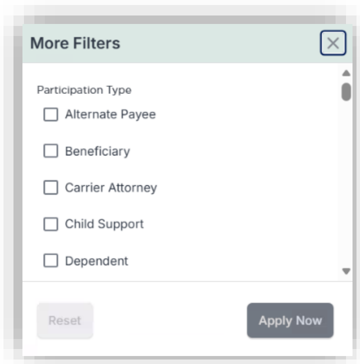
To filter by *Paid Amount*, utilize the following options:

- **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:

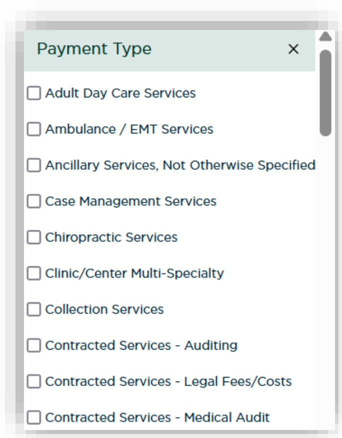
- **Predefined Types:** Select from the drop-down menu of predefined participation types (i.e. alternate payee, beneficiary, or carrier attorney)



Payment Type

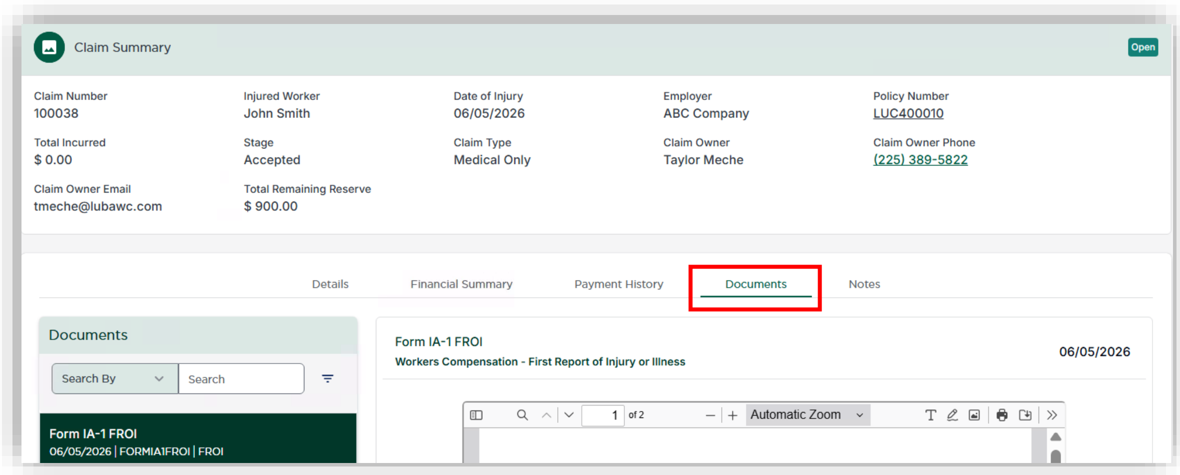
To filter by *Payment Type,* select the “More” button and utilize the following options:

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



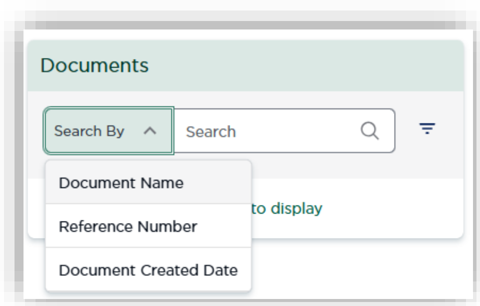
Documents Section

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.



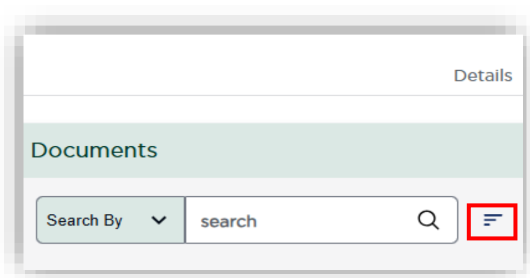
<u>Search by Document Name, Reference Number, or Document Created Date:</u>

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.



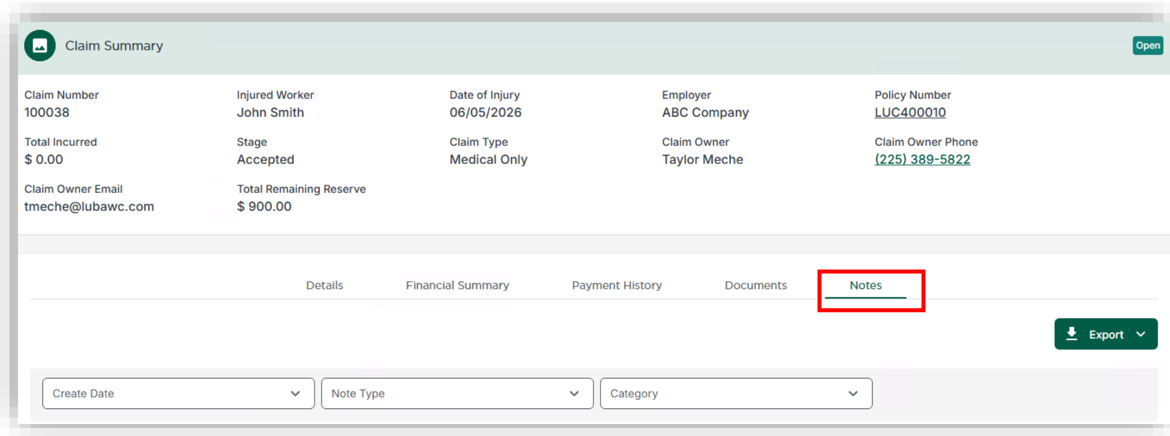
<u>More Filter Options</u>

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.



Notes

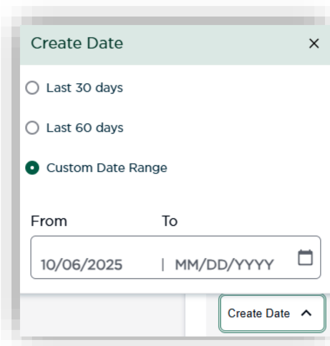
The **Notes Section** displays notes related to the specified claim.



<u>Create Date:</u>

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

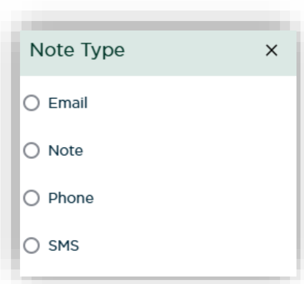
- **Date Picker**: choose from one of the available date range options or enter a custom date range in the From/To field



<u>Note Type:</u>

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

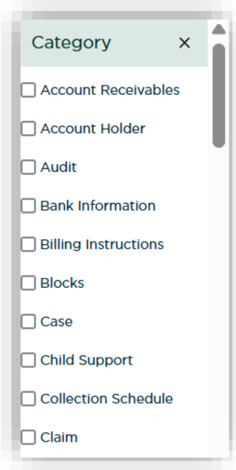
- Select the drop-down menu labeled *Note Type*
- **Select Type**: Choose from predefined note types (e.g., Email, Note, Phone, or SMS) to filter notes according to their classification



Category:

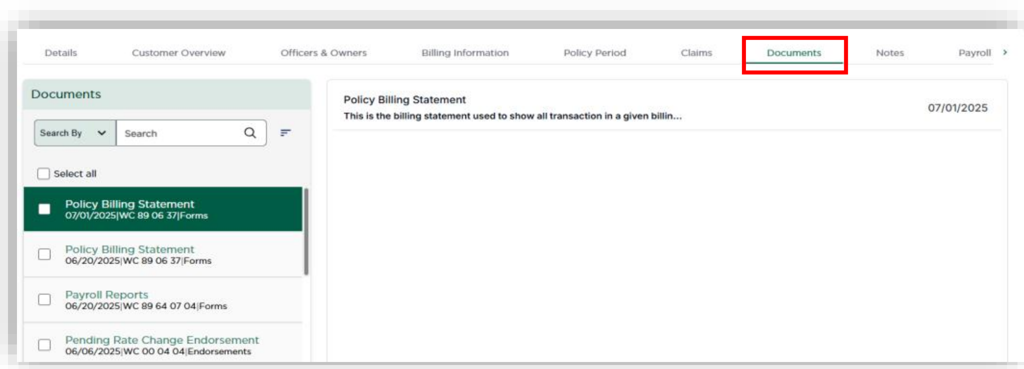
To filter by *Category*, utilize the following options:

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



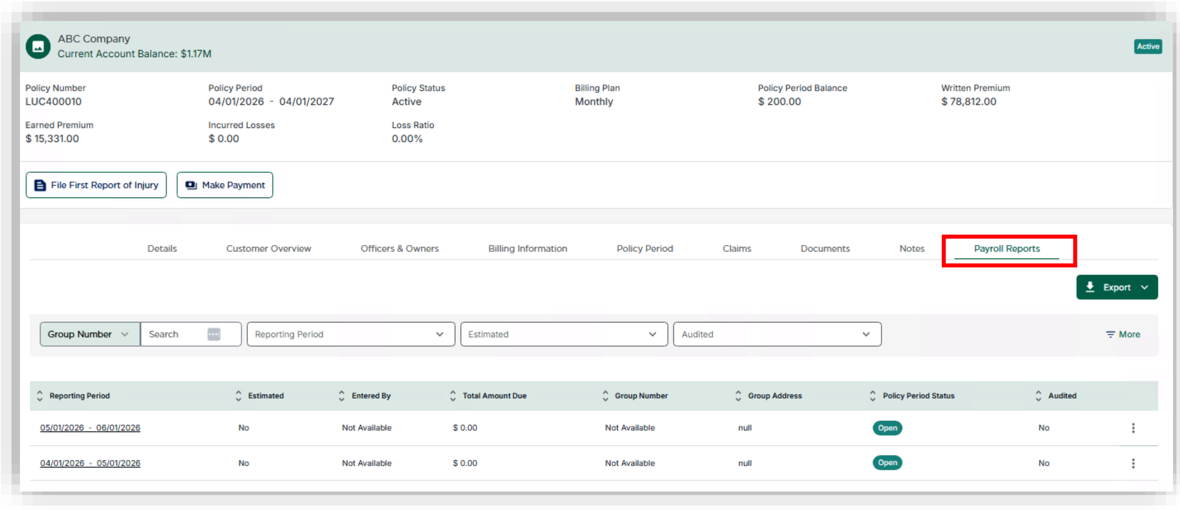
Documents Section

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

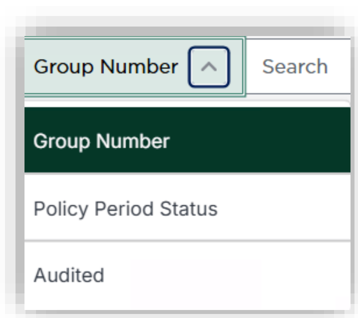


Payroll Reports Section

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.*



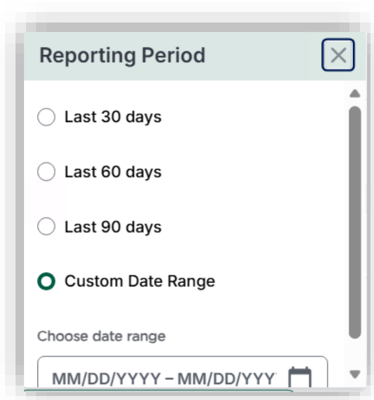
To search by **Group Number, Policy Period Status**, or **Audited**, locate the drop-down fields at the top of the Payroll Reports section. You may also filter by Reporting Period, Estimated, or Audited. Select the "More" button to filter by Policy Period Status.



<u>Reporting Period</u>

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

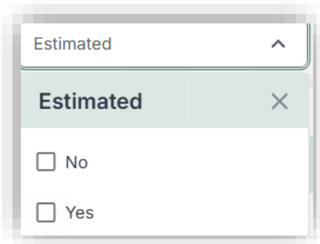
- **Date Picker:** choose from one of the available date range options or enter a custom date range



Estimated

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

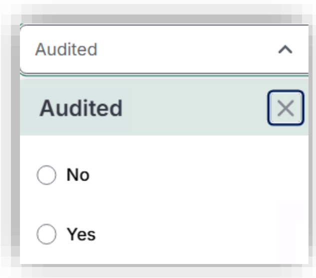
- **Yes or No:** select either Yes or No



Audited

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

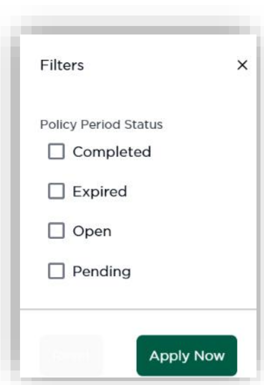
- **Yes or No:** select either Yes or No



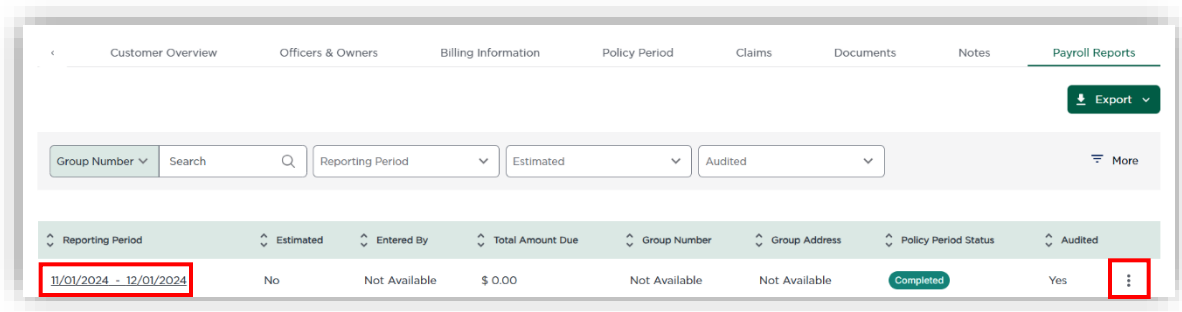
Policy Period Status

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

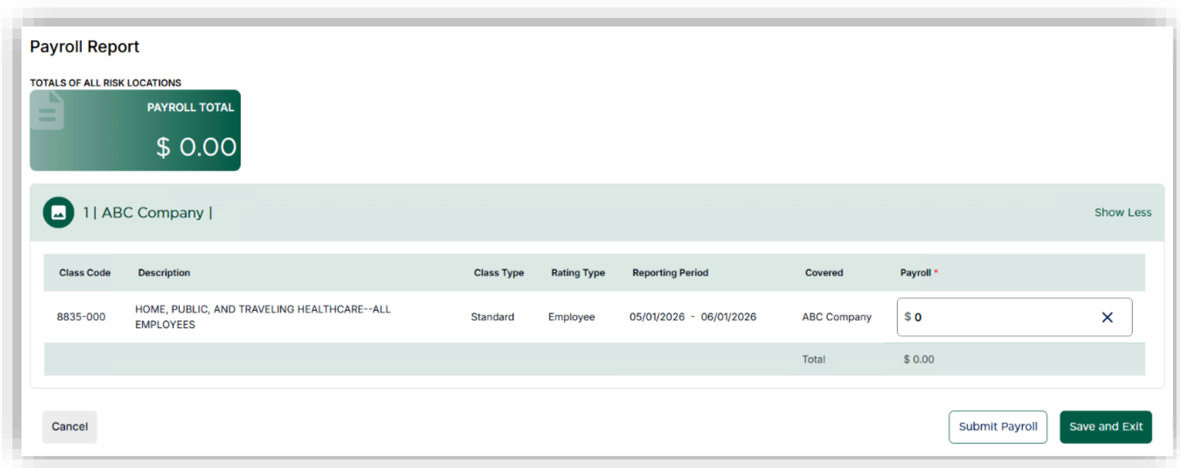
- **Filter Menu:** Select the filter menu labeled *Policy Period Status* on the right-hand side.
- **Select Status:** Choose from predefined options to filter reports based on the selected Policy Period Status (e.g., Completed, Expired, Open, or Pending).



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.

<u>Policy Period Status</u>

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

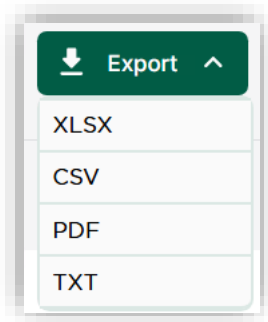
- **Filter Menu:** Select the filter menu labeled *Policy Period Status* on the right-hand side.
- **Select Status:** Choose from predefined options to filter reports based on the selected Policy Period Status (e.g., Completed, Expired, Open, or Pending).

<u>Self-Submit Payroll Reporting</u>

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

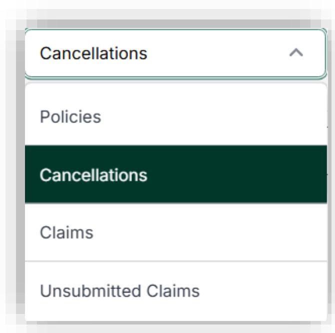
- **Report Payrolls:** Enter the Payroll $ amount, that corresponds to the class code, in the text box provided.
- **Submit:** Select the “Submit Payroll” button. You may also select “Save and Exit” if you do not wish to submit your payroll at this time.
- Once the “Submit Payroll” button has been selected,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

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



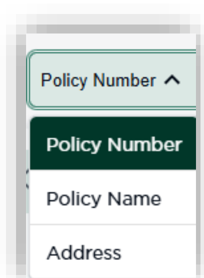
Cancellations

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



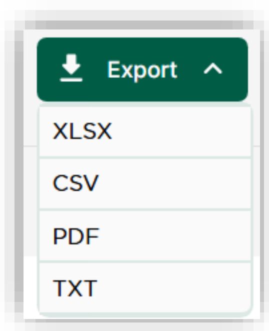
To refine searches, you can apply the following filters:

- **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

<u>Viewing Cancellation Details</u>

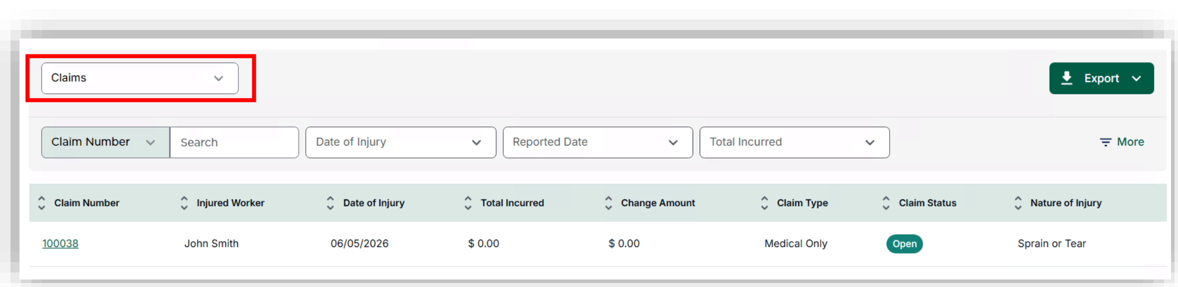
Once a Cancellation is selected, you can view detailed information, including information about the Policy associated with the Cancellation, such as its Status and Premium Amounts. If available, detailed notes on why the policy was canceled will be shown here. Also included in the Cancellation Details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



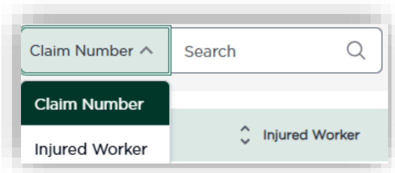
Claims Section

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:

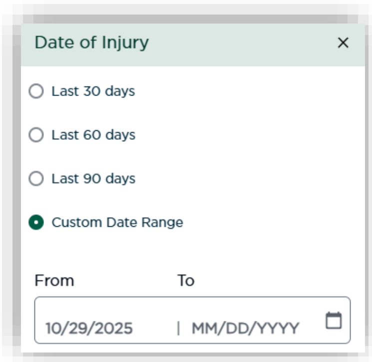
- **Claim Number:** Enter the unique claim number to locate a specific claim quickly
- **Injured Worker:** Input the name of the injured worker to find Claims associated with that individual



Date of Injury

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

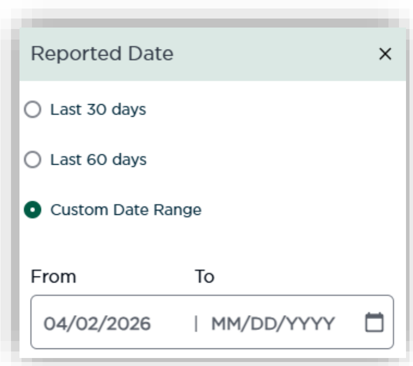
- **Specific Date:** Utilize the date picker to select a specific date for filtering Claims based on that exact date of injury
- **Date Range:** Enter a range of dates in the From/To fields to filter Claims that occurred within that specified timeframe



Reported Date

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

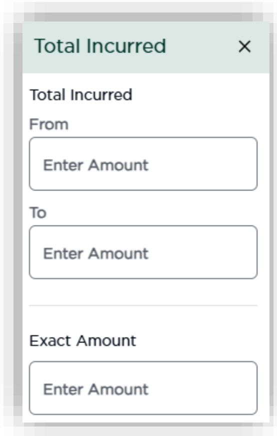
- **Specific Date:** Utilize the date picker to select a specific date for filtering Claims based on that exact date of injury
- **Date Range:** Enter a range of dates in the From/To fields to filter Claims that occurred within that specified timeframe



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

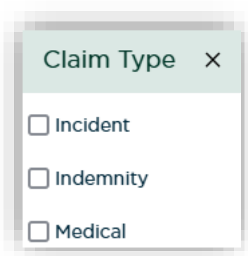
To filter by *Change Amount*, select the "More" filter button and utilize the following options:

- **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



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

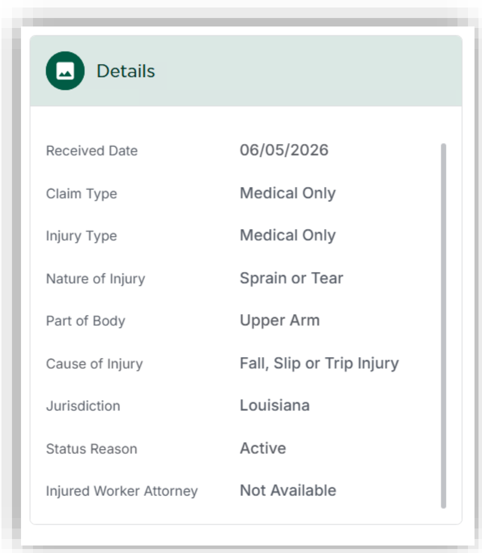
To filter by *Nature of Injury*, select the “More” filter button and utilize the following options:

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

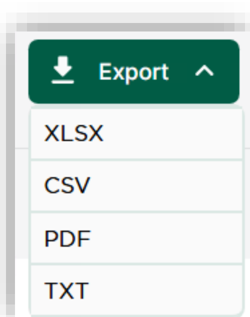
Claim Details

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

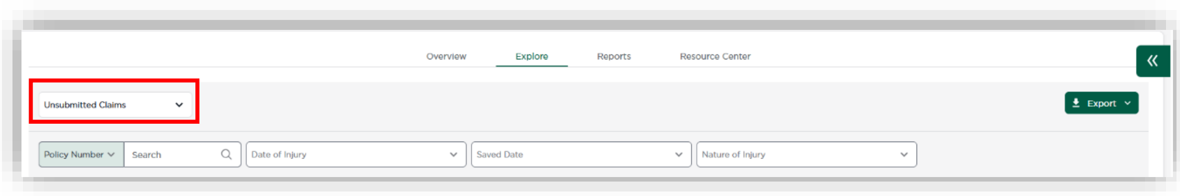


You may also select the “Export” button located on the right side of the page.



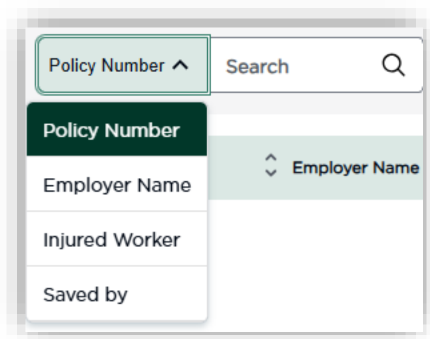
Unsubmitted Claims Section

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:

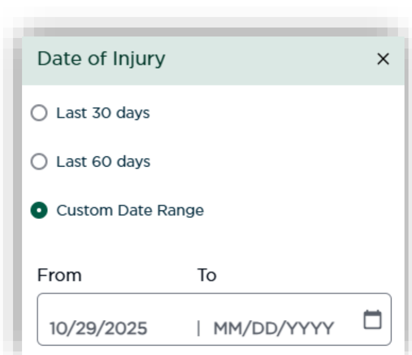
- **Policy Number**: Enter the relevant Policy number to filter unsubmitted Claims associated with that specific Policy
- **Policyholder Name**: Input the name of the policyholder to locate unsubmitted Claims tied to that policyholder
- **Injured Worker**: Use this field to search for Claims associated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



Date of Injury

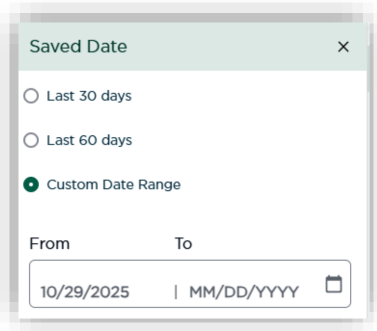
To filter by *Date of Injury*, utilize the following options:

- **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:

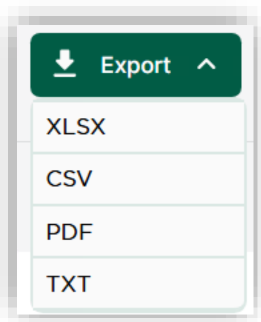
- **Specific Date**: Select a specific date to filter unsubmitted Claims based on when they were saved
- **Date Range**: Specify a range of dates to filter Claims saved within that timeframe



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.

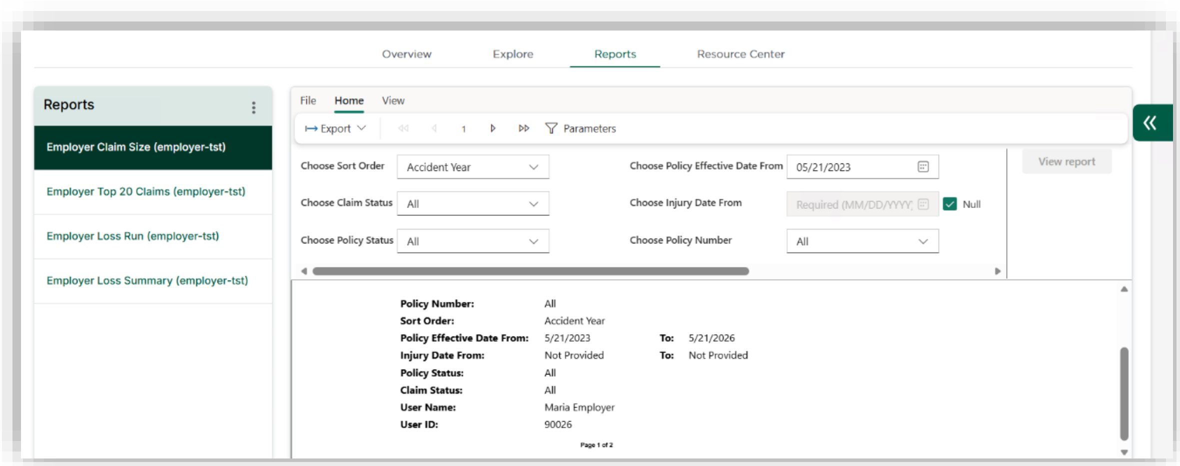


Reports

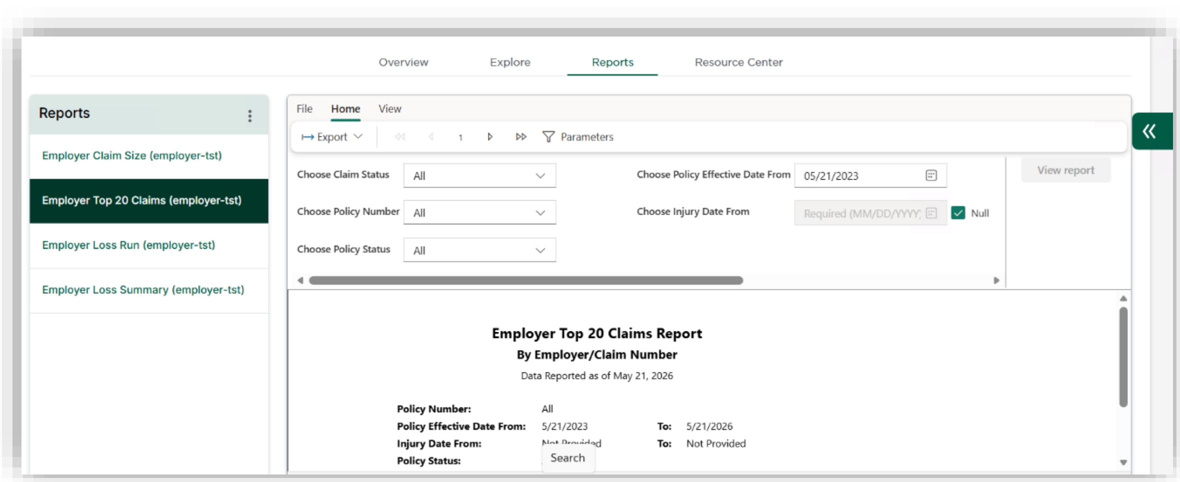
In the **Reports Section**, explore various reports related to Policies and Claims associated with your LUBA Connect user account.

- **Available Reports**: Access a variety of reports including:

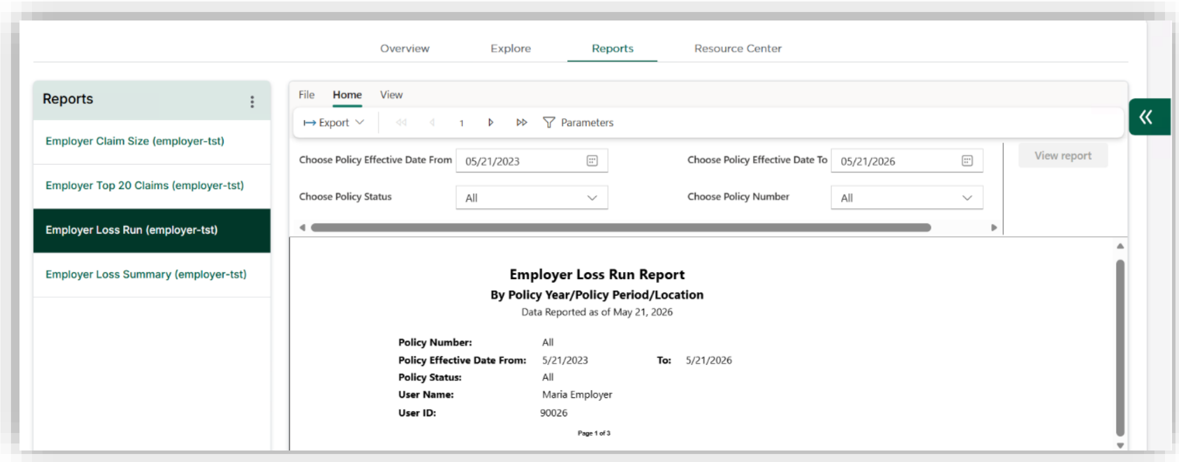
    - **Policyholder Claim Size:** Provides insight into the size and distribution of claims across your organization.



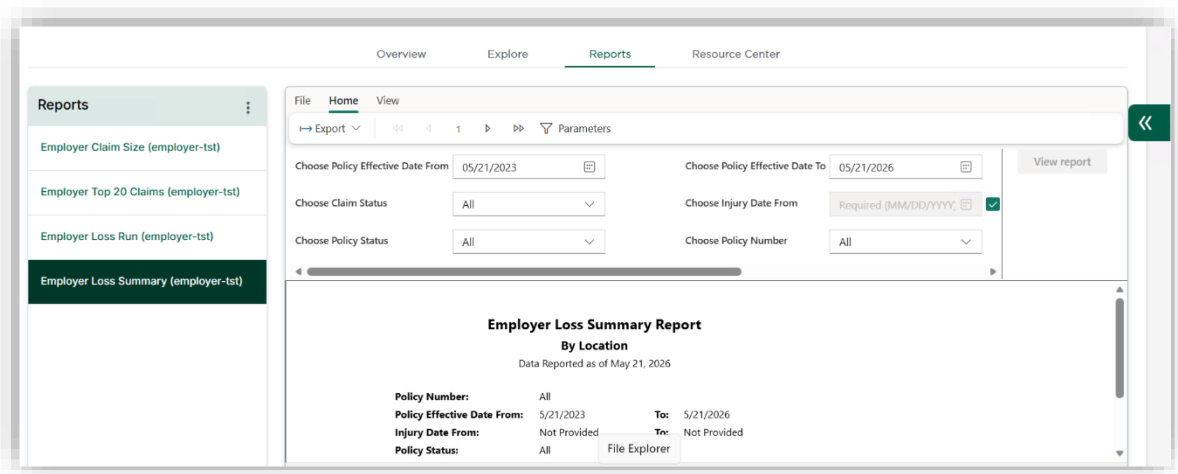
    - **Policyholder Top 20 Claims:** Highlights your largest or most significant claims for easier monitoring and follow-up.



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



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



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