

Disability Claims Reporting (DCR)

User guide for Healthcare Benefit Trust

HEALTHCARE BENEFIT TRUST



BENEFIT FROM EXPERIENCE

DCR User guide for Healthcare Benefit Trust

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- Introduction to DCR system
- General Navigation with eTour
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DCR User guide for Healthcare Benefit Trust

Introduction to DCR system

Our Disability Claims Reporting (DCR) system provides:

- The most comprehensive reporting available
- Online access to information from virtually every perspective
- More disability info to plan sponsors than ever before.

DCR User guide for Healthcare Benefit Trust

Introduction to DCR system

Our standard reports are designed to add transparency to the claim management process...

- Through the claim assessment, claim management, financial payment and time service measurement, our clients know what is being done to manage their claims.

Assessment & Management Summary Report

- High level summary of: activities taken to assess and manage claims, prognosis on open claims, and financial information.

Getting into the detail behind the Assessment & Management Summary:

- Claim Assessment Listing
- Claim Management Activities Listing
- Financial Listing

DCR User guide for Healthcare Benefit Trust

Introduction to DCR system

Claimant Management Details provides a detailed report for each claimant and contains:

- Claim assessment details
- Recent portfolio management activities
- Upcoming diary actions
- Financial summary

Our comprehensive reporting also includes:

- Service reports
- Duration reports
- Download reports

To Save time, Save the report:

- By choosing to save a report to your Newsbox, you free up the environment to run other reports

DCR User guide for Healthcare Benefit Trust

General Navigation with eTour

The following attachment can be accessed on-line and has two great uses:

- 1 – A full comprehensive tour from start to finish of the DCR system using the next and previous page buttons to navigate
- 2 – A quick reference tool with hyperlinks to get you to the specific report you need information on right now.

The eTour is also available online on GroupNet for Plan Administration.

It is located under the "Claims Management Reporting Help Documentation" link.

Your Guide to Disability Claims Reporting

A tour of GroupNet Disability Reporting

Welcome to the tour of our Disability Claims Reporting system. This tour will walk you through the major steps needed to produce your own user-defined disability reports. At the same time, it will provide you with a high level introduction to all of the reports available through our system.

The tour takes about 15 minutes to complete and shows you how to generate reports that will help you understand the activities involved in managing your disability claims.

Each page features screenshots from an actual GroupNet session. When you see a ★, this represents the next screen you would see during an actual GroupNet Disability Reporting session.

GroupNet for Plan Administration

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Your Guide to Disability Claims Reporting

Finding the Disability Reports Folder

GroupNet for Plan Administration

The screenshot displays the GroupNet for Plan Administration interface. At the top, the logo for GREAT-WEST LIFE GROUPNET is visible, along with navigation tabs for Home, Enrollment, Experience & Claims, and Select Client. Below this, the user is logged in as ABC COMPANY. The main content area is titled "Description of Reports" and contains a list of report categories. The "Disability" category is highlighted with a star icon and contains the following reports: Claims Distribution, Claims Payment, Duration, Claims Management Reporting, and Claims Management Reporting Help Documentation. Two orange arrows point from the text on the right to the "Claims Management Reporting" and "Claims Management Reporting Help Documentation" links.

**GREAT-WEST LIFE
GROUPNET**

Home Enrollment Experience & Claims Select Client

ABC COMPANY

Select desired report from list below.

Medical Dental/Vision

- Experience Reports
- Claims Distribution
- Utilization
- Top 25 Procedures
- Miscellaneous

Drugs Only

- Ingredient Cost/Dispense Fee
- Utilization
- Top 25 Drugs
- Top 25 Therapeutic Classifications
- Claims Savings

Disability

- Claims Distribution
- Claims Payment
- Duration
- Claims Management Reporting
- Claims Management Reporting Help Documentation

Click on "Claims Management Reporting" to view the reports.

Click on "Claims Management Reporting Help Documentation" to access all of the various help guides on the Disability Claims Reporting facility. On this screen you can find:

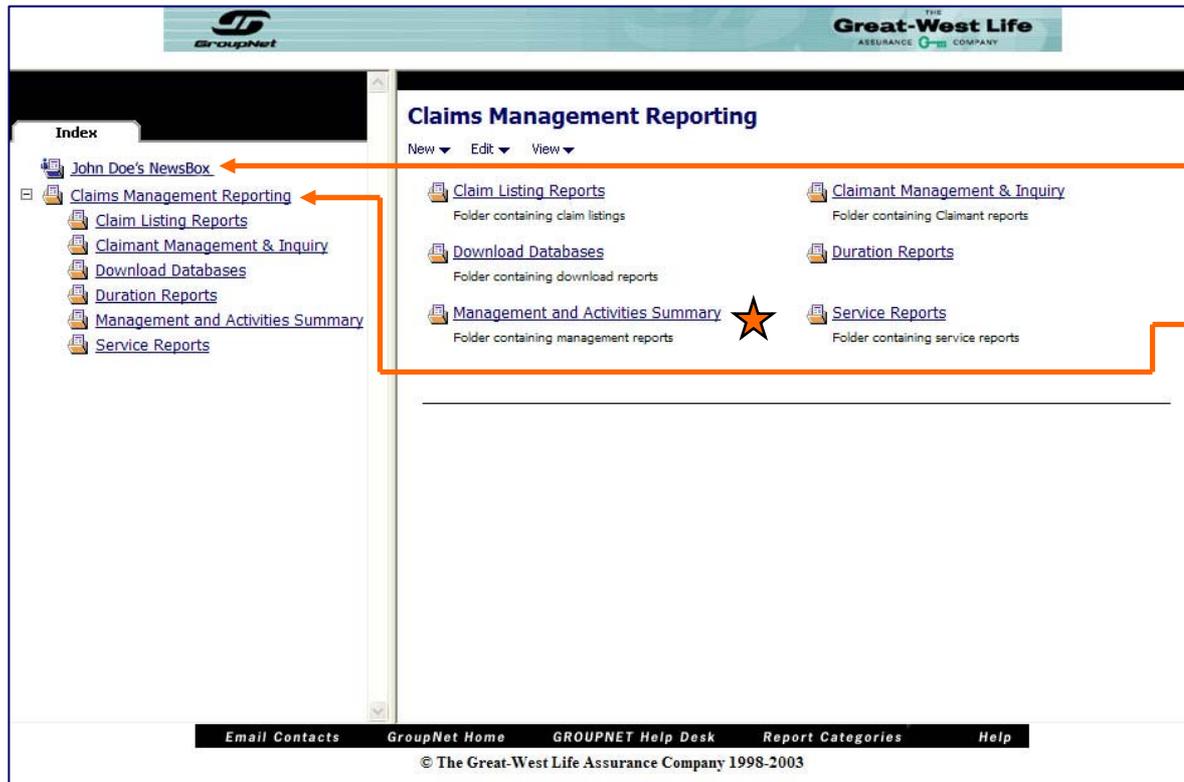
- ✘ **eTour** and **QuickTour** guides for how to use the reporting facility.
- ✘ **Report Overview** – high-level descriptions of each report including why you may want to use each.
- ✘ **Detailed Reporting Documentation** – a full explanation of each report including field definitions.
- ✘ **Report Samples** – screenshots of each report so that you can examine a report before running it.

Your Guide to Disability Claims Reporting

Into the Claims Management Reporting Environment

GroupNet for Plan Administration

Follow the stars - Each page features screenshots from an actual GroupNet session. When you see a ★, this represents the next screen you would see during an actual GroupNet Disability Reporting session.



The left pane allows easy navigation through the environment.

There are two NewsBoxes in the left pane.

- ✧ Your NewsBox – here you can save reports you have run for later viewing. You can also create folders to help keep your reports organized.
- ✧ Claims Management Reporting – contains all the standard reports.

To navigate, you can select the NewsBoxes or folders in the left pane. Contents will appear in the right pane.

Your Guide to Disability Claims Reporting

Management and Activities Summary Folder

GroupNet for Plan Administration

The screenshot displays the GroupNet web application interface. At the top, the GroupNet logo is on the left and 'THE Great-West Life ASSURANCE COMPANY' is on the right. Below the header is a navigation menu with an 'Index' tab. The index lists several report categories: 'John Doe's NewsBox', 'Claims Management Reporting', 'Claim Listing Reports', 'Claimant Management & Inquiry', 'Download Databases', 'Duration Reports', 'Management and Activities Summary' (highlighted in orange), and 'Service Reports'. The main content area is titled 'Management and Activities Summary' and contains a sub-link 'Assessment and Management Summary' with a star icon and a 'Modified: October 14, 2005 14:38:58' timestamp. An orange arrow points from the 'Assessment and Management Summary' link to the 'Claims Management Reporting' link in the index. Another orange arrow points from the 'Assessment and Management Summary' link to the 'Management and Activities Summary' folder title. A third orange arrow points from the 'Assessment and Management Summary' link to the 'Assessment and Management Summary' link in the main content area. At the bottom, there is a footer with links for 'Email Contacts', 'GroupNet Home', 'GROUPNET Help Desk', 'Report Categories', and 'Help', along with the copyright notice '© The Great-West Life Assurance Company 1998-2003'.

This report provides an overview of the number of claims managed, the actions taken to manage open claims, the prognosis of the open claim block, and a high level financial summary.

Select the report, or

Go back to the main report folder.

Your Guide to Disability Claims Reporting

User Defined Criteria – Selecting a Policy

GroupNet for Plan Administration

The screenshot shows a web page titled "Assessment And Management Summary" with the GroupNet logo and "Great-West Life" branding. Below the title, it says "Please select the policy you'd like to report on." There is a dropdown menu with "12345" selected and a "Continue" button. A star icon is positioned to the left of the "Continue" button. At the bottom, there is a navigation bar with links for "Email Contacts", "GroupNet Home", "GROUPNET Help Desk", "Report Categories", and "Help", along with a copyright notice: "© The Great-West Life Assurance Company 1998-2003".

The title of the report you are requesting is shown. (For this eTour, the "Assessment and Management Summary" report is used as an example.)

1) Choose a policy number.

2) Hit the "Continue" button, or use the "Back" function in your browser to change your report selection.

Your Guide to Disability Claims Reporting

Assessment & Management Summary – User Defined Criteria

GroupNet for Plan Administration

Please select from the following reporting criteria.

LTD data is available for report dates from July 2001 onward
STD and Adjudication Only data is available for report dates from October 2001 onward

Report Month

Division Benefit Class Product Type

[Email Contacts](#) [GroupNet Home](#) [GROUPNET Help Desk](#) [Report Categories](#) [Help](#)

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1) Select a report month – The Assessment and Management Summary report is updated monthly. A month is selected by its month end.

2) Select the Division, Benefit Class, and Product Type on which to report.

3) Hit the “Continue” button, or use the “Back” function in your browser to change your policy selection.

Multiple divisions and classes can be selected with your mouse while holding the “CTRL” key.

Your Guide to Disability Claims Reporting

User Defined Criteria – Confirmation Screen

GroupNet for Plan Administration

Assessment And Management Summary

Please confirm your selections and press 'Process Report' to schedule your report for processing.

Report Month	2006-05-31
Policy	12345
Division(s)	1, 90
Benefit Class(es)	1,890
Product	STD

The expected run time for this report is 1 minute.
The actual time needed to run a specific report will vary depending on the criteria selected and volume of data required.

[Email Contacts](#) [GroupNet Home](#) [GROUPNET Help Desk](#) [Report Categories](#) [Help](#)

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The confirmation screen shows the user the criteria used to generate the report.

Click "Process Report" to generate the report, or

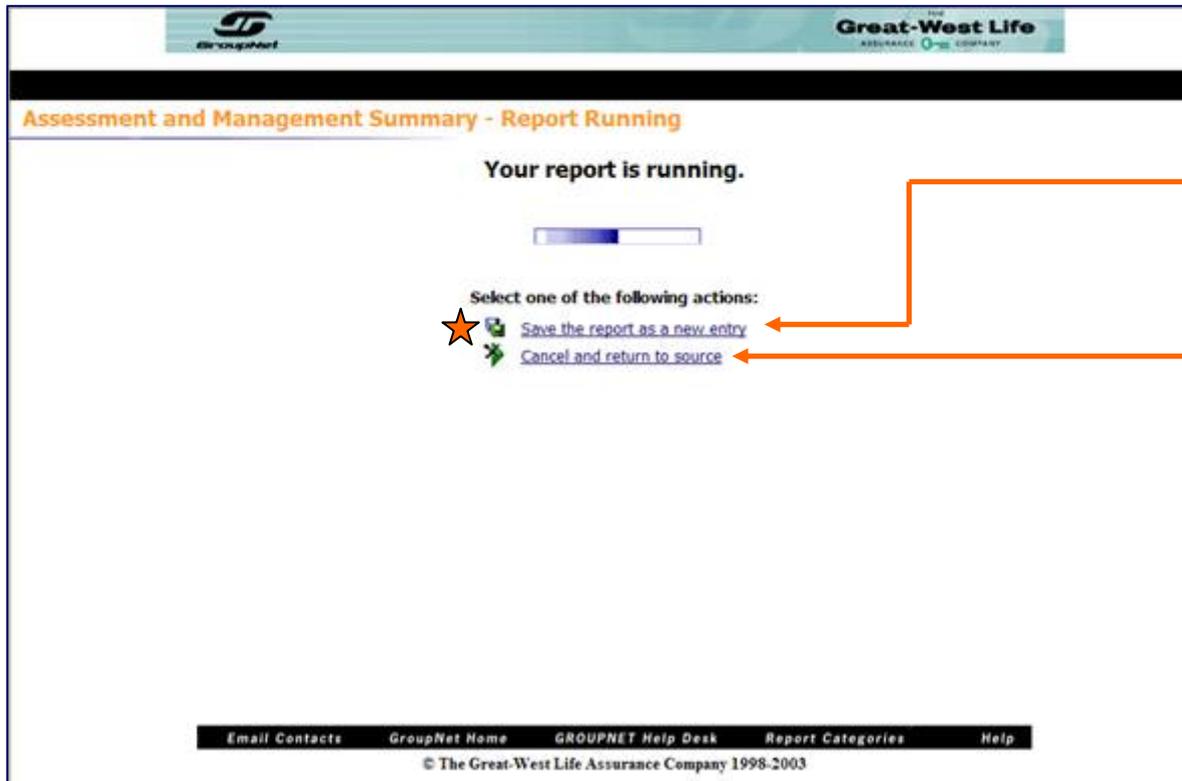
Use the "Back" function in your browser to change your selections.



Your Guide to Disability Claims Reporting

Your Report is Running

GroupNet for Plan Administration



Your report will open in this window when it is complete – the run-time for the report will depend on the volume of data being retrieved. Or,

To save time by letting the report run in the background, save the report to your NewsBox.

Clicking "Cancel and return to source" and "OK" to cancel the report will take you back to the report folder. This report will be cancelled.

By choosing to save a report, you free up the environment to run other reports.

Your Guide to Disability Claims Reporting

Saving the Report to your Personal NewsBox

GroupNet for Plan Administration

Save As

Select where you want the entry placed and what it should be named.

Name:
Assessment and Management Summary

Description:
Policy 12345 - May 2006

Destination NewsBox:
NewsIndex > Personal NewsBoxes > John Doe's NewsBox [Other NewsBox](#)

Save As:
Custom View Report

Hint:
A 'custom view' is an object that allows you to view the report with your own custom properties, such as your own prompt answers or schedule.

OK Cancel

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help

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Type a name for the report in the Name box and an optional description.

Your report will go to the default NewsBox unless you click "Other NewsBox".

Click "OK" to save the report. It will now run in the background and appear in your Personal NewsBox.

Your Guide to Disability Claims Reporting

Your Report is Running in the Background

GroupNet for Plan Administration

The screenshot shows the GroupNet for Plan Administration interface. The top header features the GroupNet logo and the Great-West Life Assurance Company logo. The left sidebar contains an 'Index' section with a star icon next to 'John Doe's NewsBox' and a list of report categories: 'Claims Management Reporting', 'Claim Listing Reports', 'Claimant Management & Inquiry', 'Download Databases', 'Duration Reports', 'Management and Activities Summary', and 'Service Reports'. The main content area is titled 'Management and Activities Summary' and displays a report titled 'Assessment and Management Summary' with a 'Modified: October 14, 2005 14:38:58' timestamp. The footer includes navigation links: 'Email Contacts', 'GroupNet Home', 'GROUPNET Help Desk', 'Report Categories', and 'Help', along with the copyright notice '© The Great-West Life Assurance Company 1998-2003'.

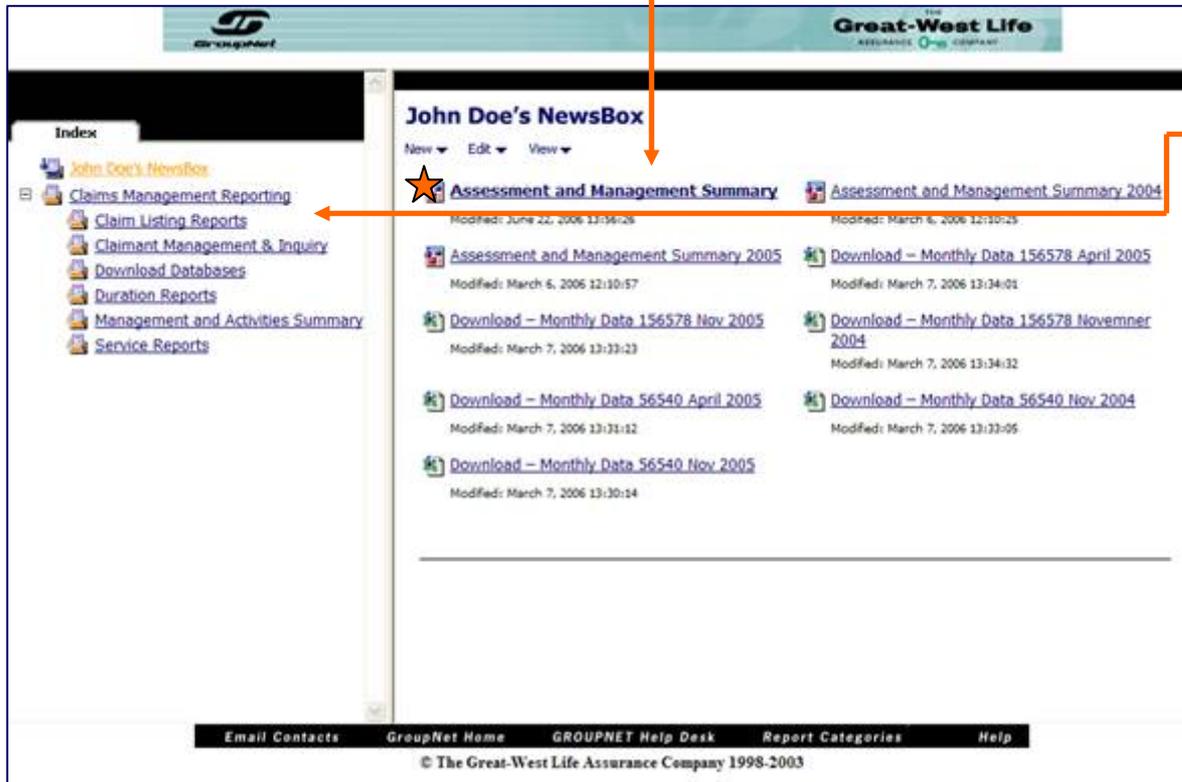
Click on your NewsBox or folder to view the report you just saved, or

Select another report to run; either from this page or from a different folder.

Your Guide to Disability Claims Reporting

Your Report is in your Personal NewsBox

GroupNet for Plan Administration



Select one of the reports you have saved – reports stay in your NewsBox for 90 days, or

Go back to the main report folder to run another report.

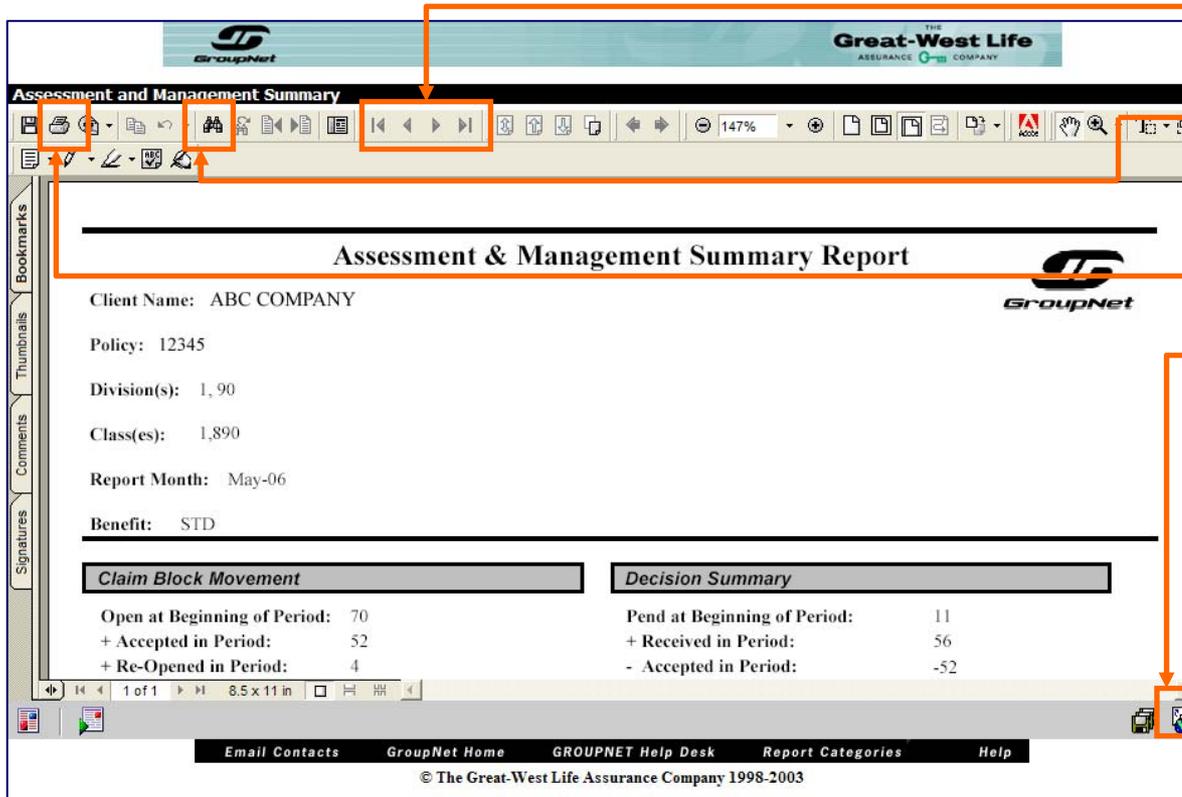
Saving a report to your NewsBox allows you to re-access it quickly without having to re-run the report.

Your Guide to Disability Claims Reporting

Viewing the Report – Part 1 of 2

Reports other than the download reports are returned in PDF format. Use features of the Adobe Reader software to maximize the utility of the reporting environment.

GroupNet for Plan Administration



Scroll Buttons - Use the Scroll button to move between pages.

Search Facility – Use this facility to quickly find anything within the report.

Printing – Use this print icon to get a hard copy of the report.

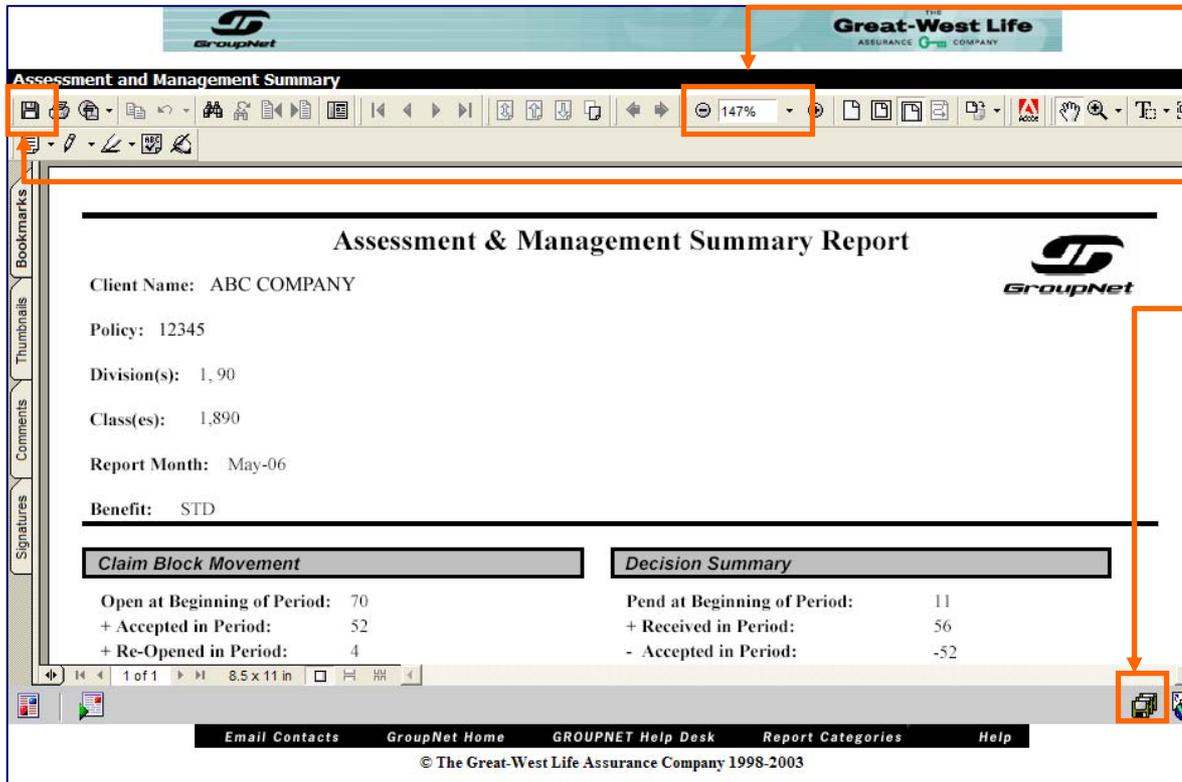
Return to source to run more reports.

Some reports can be several pages long. Use the search function to find things like employee names or IDs.

Your Guide to Disability Claims Reporting

Viewing the Report – Part 2 of 2

GroupNet for Plan Administration



Zoom - Use the Zoom icon to increase the size of the report for easy viewing.

Save – Use this icon to save the PDF report to your hard drive, allowing you to keep it on file indefinitely. Or,

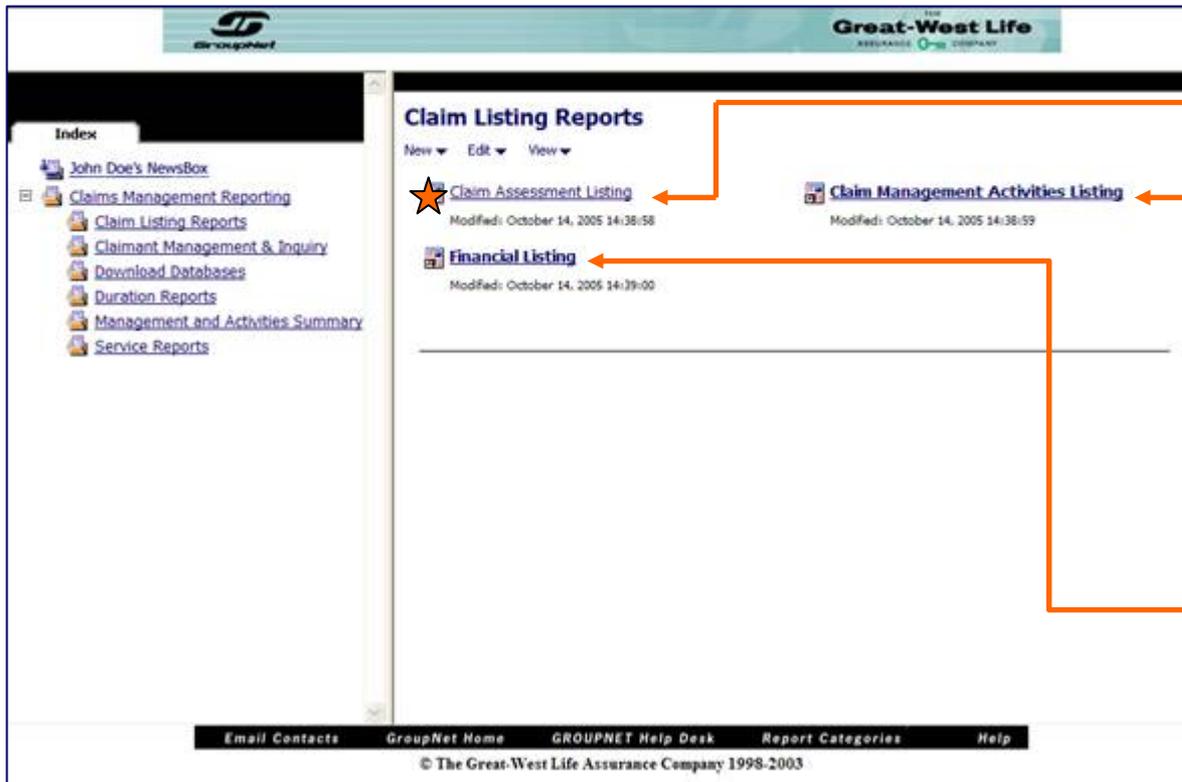
Choose Save As – Use this icon to save a version of this PDF report to your NewsBox.

All reports can be saved to your PC or network – allowing you to access them in the future without going into GroupNet.

Your Guide to Disability Claims Reporting

Claim Listing Reports Folder

GroupNet for Plan Administration



Claim Assessment Listing – Provides information related to the assessment of the disability including key dates, statuses, and prognosis. Starting and ending status can be used to filter the report.

Claim Management Activities Listing – Provides indicators for management activities on each claim as well as prognosis, complexity and other income indicators. Starting and ending status can be used to filter the report.

Financial Listing – Provides a detailed claimant list of financial details including gross, offset, and net charge amounts. Employee demographics supplement the financial amounts to provide a rounded picture.

Your Guide to Disability Claims Reporting

Claim Assessment Listing – User Defined Criteria

GroupNet for Plan Administration

Claim Assessment Listing

Please select from the following reporting criteria.

LTD data is available for report dates from July 2001 onward
STD and Adjudication Only data is available for report dates from October 2001 onward

Report Month: 2006-05-31

Division: 1 Benefit Class: All (890) Product Type: Lid (Std, Adj Only)

Status At Beginning Of Period: All (In Period Activity, Terminated) Status At End Of Period: All (Terminated, Accepted)

★ Continue

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help
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1) Select the report month – the Claim Assessment Listing Report is updated monthly. A month is selected by its month end.

2) Select Division, Benefit Class and Product on which to report.

3) Claim status at the beginning and end of the report month selected - use these criteria selections to narrow your search results and focus your report.

4) Hit the “Continue” button, or use the “Back” function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Claim Management Activity Listing – User Defined Criteria

GroupNet for Plan Administration

GroupNet

Great-West Life
ASSURANCE COMPANY

Claim Management Activities Listing

Please select from the following reporting criteria.

LTD data is available for report dates from July 2001 onward
STD and Adjudication Only data is available for report dates from October 2001 onward

Report Month: 2006-05-31

Division: 1 Benefit Class: All (890) Product Type: Ltd (Std, Adj Only)

Status At Beginning Of Period: All (In Period Activity, Terminated) Status At End Of Period: All (Terminated, Accepted)

Continue

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help

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1) Select the report month – the Claim Management Activity Listing is updated monthly. A month is selected by its month end.

2) Select Division, Benefit Class and Product on which to report.

3) Claim status at the beginning and end of the report month selected - use these criteria selections to narrow your search results and focus your report.

4) Hit the "Continue" button, or use the "Back" function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Financial Listing – User Defined Criteria

GroupNet for Plan Administration

The screenshot shows the 'Financial Listing' page in the GroupNet system. At the top, there is a header with the GroupNet logo and 'The Great-West Life Assurance Company'. Below the header, the title 'Financial Listing' is centered. A message reads: 'Please select from the following reporting criteria.' Below this, two lines of text provide availability information: 'LTD data is available for report dates from July 2001 onward' and 'STD and Adjudication Only data is available for report dates from October 2001 onward'. The main form contains several dropdown menus and a button, all highlighted with orange boxes and arrows pointing to the numbered instructions on the right. The 'Period From' dropdown is set to '2006-05-01' and 'Period To' is '2006-05-31'. The 'Division' dropdown is set to '1', 'Benefit Class' is 'All' (with '890' visible below it), and 'Product Type' is 'Ltd' (with 'Std' and 'Adj Only' visible below it). The 'Status At End Of Period' dropdown is set to 'All' (with 'Terminated' and 'Accepted' visible below it). A 'Continue' button is located at the bottom left of the form area. At the bottom of the page, there is a footer with links for 'Email Contacts', 'GroupNet Home', 'GROUPNET Help Desk', 'Report Categories', and 'Help', along with the copyright notice '© The Great-West Life Assurance Company 1998-2003'.

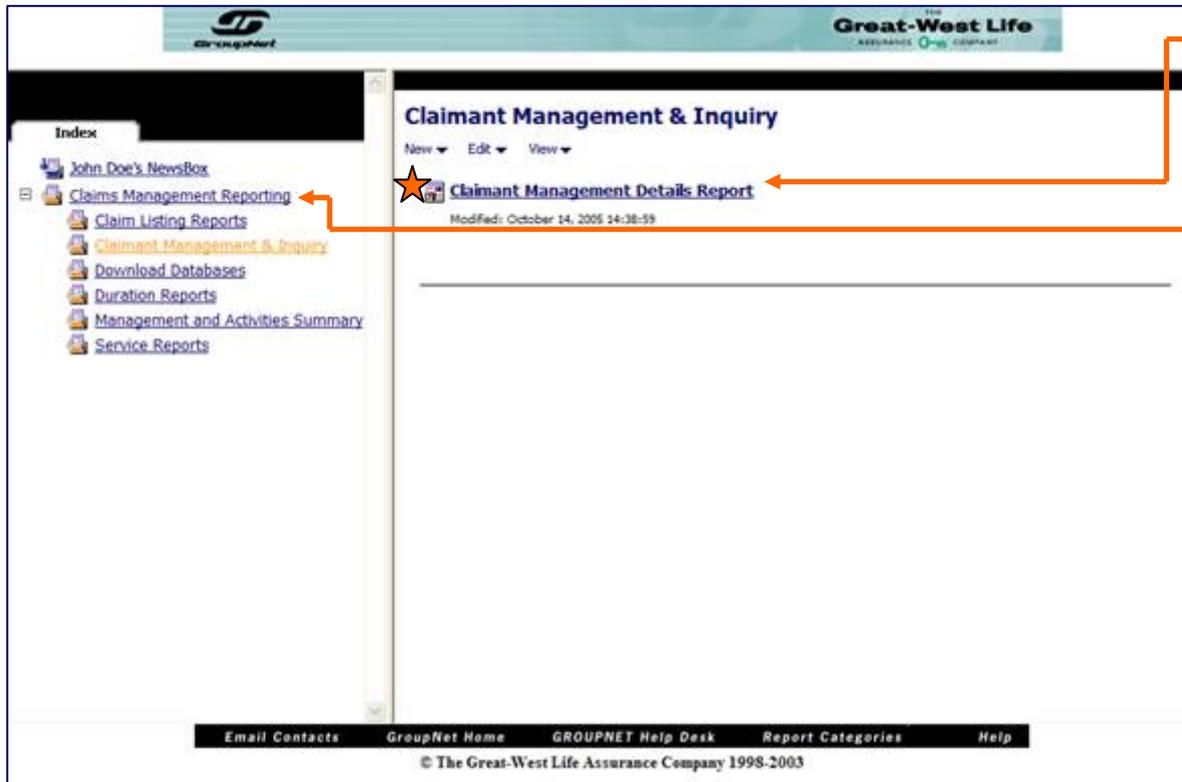
- 1) Select the starting and ending period for the report.
- 2) Select Division, Benefit Class and Product on which to report.
- 3) Claim status at the end of the report period selected – use this criteria selection to narrow your search results and focus your report.
- 4) Hit the “Continue” button, or use the “Back” function in your browser to change your policy selection.



Your Guide to Disability Claims Reporting

Claimant Management and Inquiry Folder

GroupNet for Plan Administration



Claimant Management Details Report – per claimant overview of most details related to their claim including payment information.

Select the report, or go back to the main report folder.

Your Guide to Disability Claims Reporting

Claimant Management Details Report – User Defined Criteria

GroupNet for Plan Administration

Claimant Management Details Report – This report provides a one page overview of almost all details related to a claimant’s disability claim. It enables you to request reports on one claimant at a time.

Please select from the following reporting criteria.

Effective Date

Division Benefit Class Product Type
Std
Adj Only

Claim Mgmt Phase
Straight Fwd Mgmt
Maintenance Mgmt

Optional Employee Information

Identifier

Or
Employee Last Names Starting With (If employee identifier is entered then this option is ignored)

[Email Contacts](#) [GroupNet Home](#) [GROUPNET Help Desk](#) [Report Categories](#) [Help](#)

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1) Select the report period (updated weekly).

2) Select Division, Benefit Class and Product on which to report.

3) Select the claims management phase – select the specific claim management phase, or

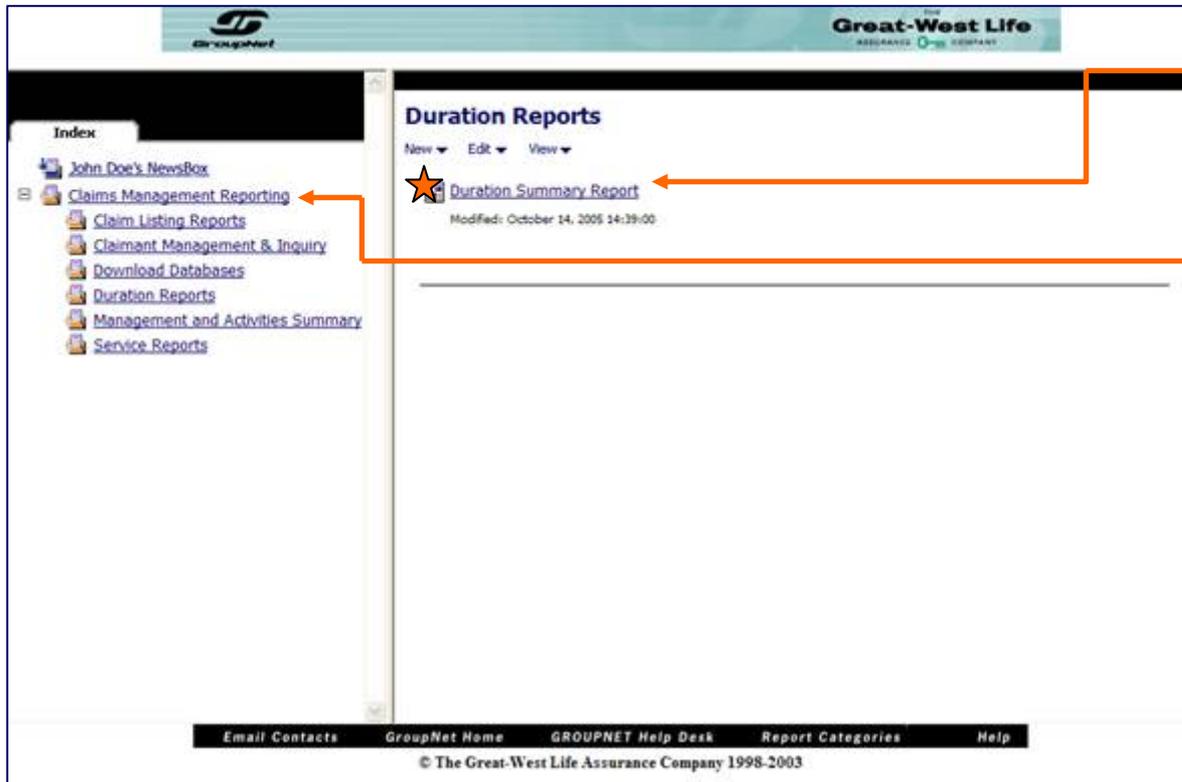
4) Select criteria for a specific employee – this report produces one report per employee. You may search by Employee ID or by the first letters of their last name.

5) Hit the “Continue” button, or use the “Back” function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Duration Reports Folder

GroupNet for Plan Administration



Duration Summary Report –
Creates an overview on the number of closed claims, total days disabled and total cost, plus average days disabled and average cost. These results are broken out into duration ranges.

Select the report, or go back to the main report folder.

Your Guide to Disability Claims Reporting

Duration Summary Report – User Defined Criteria

GroupNet for Plan Administration

Duration Summary

Please select from the following reporting criteria.

LTD data is available for report dates from July 2001 onward
STD and Adjudication Only data is available for report dates from October 2001 onward
LTD data is available for report dates from July 2001 onward

Period From 2006-05-01 Period To 2006-05-31

Division 1 Benefit Class All 890 Product Type Ltd Std Adj Only

Continue

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help
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1) Select the report month – the Duration Summary Report is updated monthly. A month is selected by its month end.

2) Select Division, Benefit Class and Product on which to report.

3) Hit the “Continue” button, or use the “Back” function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Service Report Folder

GroupNet for Plan Administration



Service Turnaround Report – keeps track of the average number of calendar days for Great-West Life to send the necessary correspondence to keep the disability process moving. Percentages are also distributed into time bands.

Time to Decision Service Report – displays the dates when key data was collected and the average lead times that impacted when a decision could be made. Also shows the duration of time to make a decision.

Select the report, or go back to the main report folder.

Your Guide to Disability Claims Reporting

Time to Decision Service Report – User Defined Criteria

GroupNet for Plan Administration

Time To Decision

Please select from the following reporting criteria.

Period From 2006-05-01 Period To 2006-05-31

Division 1 Benefit Class All Product Type Ld

Continue

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help

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1) Select the starting and ending period for the report. The Time to Decision report is updated monthly.

2) Select Division, Benefit Class and Product on which to report.

3) Hit the "Continue" button, or use the "Back" function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Service Turnaround Report – User Defined Criteria

GroupNet for Plan Administration

Service Turnaround

Please select from the following reporting criteria.

LTD data is available for report dates from July 2001 onward
STD and Adjudication Only data is available for report dates from October 2001 onward

Period From: 2006-05-01 Period To: 2006-05-31

Division: 1 Benefit Class: All 890 Product Type: Ltd
Std
Adj Only

★ Continue

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help

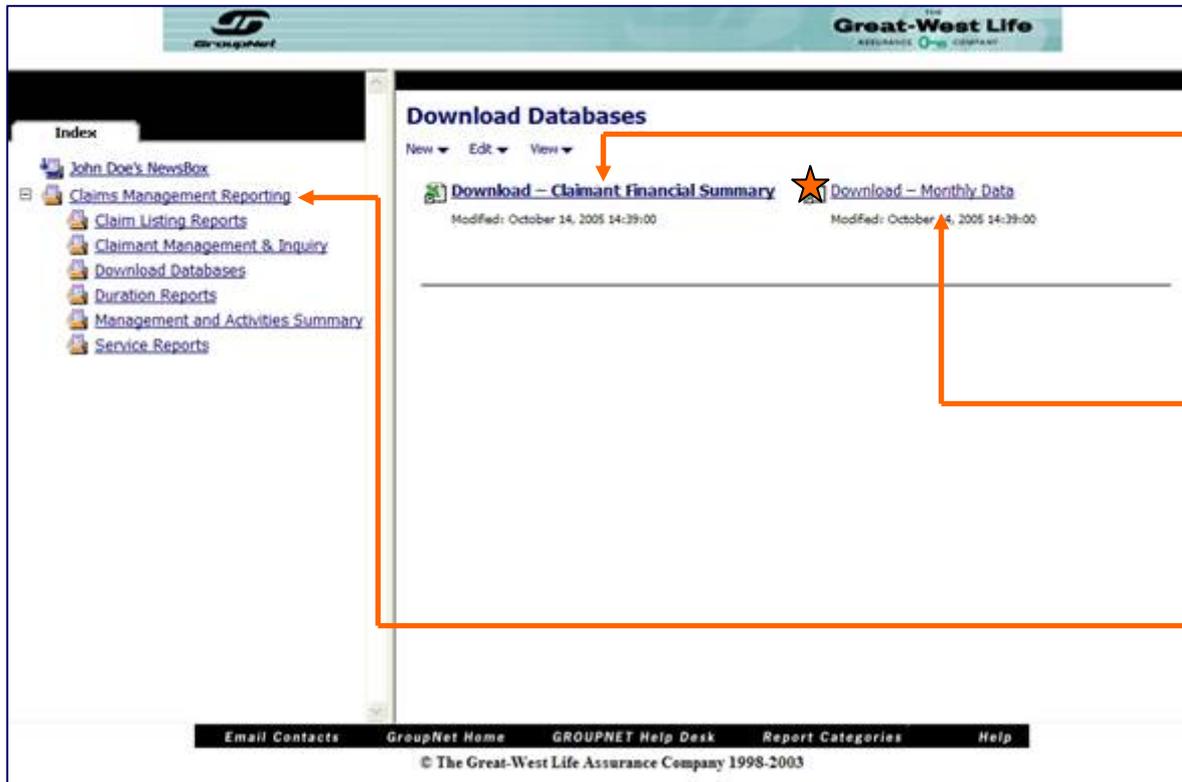
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- 1) Select the starting and ending period for the report. The Service Turnaround report is updated monthly.
- 2) Select Division, Benefit Class and Product on which to report.
- 3) Hit the "Continue" button, or use the "Back" function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Download Databases Folder

GroupNet for Plan Administration



Download Claimant Financial Summary – a Microsoft Excel file that contains the gross, offsets, and net charge amounts for each claimant. Also contains detailed demographic information and status. Calculations can be done on-screen or the file can be saved outside of GroupNet.

Download Monthly Data – a Microsoft Excel file that contains much of the data contained in the other reports. This file can be downloaded each month to analyze or create your own customized reports.

Select the report, or go back to the main report folder.

Your Guide to Disability Claims Reporting

Download Monthly Data – User Defined Criteria

GroupNet for Plan Administration

The screenshot shows the 'Download - Monthly Data' interface. At the top, there are logos for GroupNet and Great-West Life. The main heading is 'Download - Monthly Data'. Below this, a message asks the user to select reporting criteria. Two lines of red text provide availability information: 'LTD data is available for report dates from July 2001 onward' and 'STD and Adjudication Only data is available for report dates from October 2001 onward'. The 'Report Month' is set to '2006-05-31'. Below this, three dropdown menus are shown: 'Division' with '1' selected, 'Benefit Class' with 'All' selected and '890' visible in a sub-menu, and 'Product Type' with 'Ltd' selected and 'Std' and 'Adj Only' visible in a sub-menu. A 'Continue' button is located at the bottom left, marked with a star. At the bottom of the page, there is a navigation bar with links for 'Email Contacts', 'GroupNet Home', 'GROUPNET Help Desk', 'Report Categories', and 'Help', along with a copyright notice for '© The Great-West Life Assurance Company 1998-2003'.

1) Select the report month – the Download Monthly Data report is updated monthly. A month is selected by its month end.

2) Select Division, Benefit Class and Product on which to report.

3) Hit the "Continue" button, or use the "Back" function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Download Claimant Financial Summary – User Defined Criteria

GroupNet for Plan Administration

Download - Claimant Financial Summary

Please select from the following reporting criteria.

LTD data is available for report dates from July 2001 onward
STD and Adjudication Only data is available for report dates from October 2001 onward

Period From Period To

Division Benefit Class Product Type

[Email Contacts](#) [GroupNet Home](#) [GROUPNET Help Desk](#) [Report Categories](#) [Help](#)

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1) Select the starting and ending period for the report. The Download is updated monthly.

2) Select Division, Benefit Class and Product on which to report.

3) Hit the "Continue" button, or use the "Back" function in your browser to change your policy selection.

Your Guide to Disability Claims Reporting

Viewing a Download Report

GroupNet for Plan Administration

View the report – reports are returned in Excel format by default.

Download - Monthly Data 12345 May 2006						
A1 fx Period Start Date						
	A	B	C	D	E	F
1	Period Start Date	Rpt Effective Date	Group Client Name	Group Policy No	Employee Id	Cov Person Name
2	05/01/2006	05/31/2006	ABC COMPANY	12345	E100798479	
3	05/01/2006	05/31/2006	ABC COMPANY	12345	E103876199	
4	05/01/2006	05/31/2006	ABC COMPANY	12345	E104939749	
5	05/01/2006	05/31/2006	ABC COMPANY	12345	E105201370	
6	05/01/2006	05/31/2006	ABC COMPANY	12345	E107205148	
7	05/01/2006	05/31/2006	ABC COMPANY	12345	E107289001	
8	05/01/2006	05/31/2006	ABC COMPANY	12345	E107951451	
9	05/01/2006	05/31/2006	ABC COMPANY	12345	E108045923	
10	05/01/2006	05/31/2006	ABC COMPANY	12345	E108104787	
11	05/01/2006	05/31/2006	ABC COMPANY	12345	E108375593	
12	05/01/2006	05/31/2006	ABC COMPANY	12345	E111942033	
13	05/01/2006	05/31/2006	ABC COMPANY	12345	E112307699	
14	05/01/2006	05/31/2006	ABC COMPANY	12345	E112807177	
15	05/01/2006	05/31/2006	ABC COMPANY	12345	E113748651	
16	05/01/2006	05/31/2006	ABC COMPANY	12345	E113993950	
17	05/01/2006	05/31/2006	ABC COMPANY	12345	E114467657	
18	05/01/2006	05/31/2006	ABC COMPANY	12345	E114570138	
19	05/01/2006	05/31/2006	ABC COMPANY	12345	E117380402	
20	05/01/2006	05/31/2006	ABC COMPANY	12345	E117536474	
21	05/01/2006	05/31/2006	ABC COMPANY	12345	E117859256	
22	05/01/2006	05/31/2006	ABC COMPANY	12345	E118158948	

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What you see on your screen is an actual Excel Spreadsheet, so you are able to use all of the common Excel functions.

Your Guide to Disability Claims Reporting

Navigation Short-Cuts

GroupNet for Plan Administration

The screenshot shows the GroupNet interface for Claims Management Reporting. The top header includes the GroupNet logo and 'THE Great-West Life ASSURANCE COMPANY'. The main content area is titled 'Claims Management Reporting' and contains several folders and reports: 'Claim Listing Reports' (Folder containing claim listings), 'Claimant Management & Inquiry' (Folder containing Claimant reports), 'Download Databases' (Folder containing download reports), 'Duration Reports', 'Management and Activities Summary' (Folder containing management reports), and 'Service Reports' (Folder containing service reports). A left sidebar shows an 'Index' with links to 'John Doe's NewsBox', 'Claims Management Reporting', 'Claim Listing Reports', 'Claimant Management & Inquiry', 'Download Databases', 'Duration Reports', 'Management and Activities Summary', and 'Service Reports'. At the bottom, a navigation bar contains links for 'Email Contacts', 'GroupNet Home', 'GROUPNET Help Desk', 'Report Categories', and 'Help'. Orange arrows point from the text descriptions on the right to these navigation elements in the screenshot.

Email Contacts – Provides instructions on how to Email a Great-West contact.

GroupNet Home – Takes you to the GroupNet Home Page.

GroupNet Help Desk – Opens your email with the address to the GroupNet help desk already entered.

Report Categories – Takes you to the main reporting page of GroupNet.

Help – This icon takes you to the Claims Management Reporting Help Documentation.

Your Guide to Disability Claims Reporting

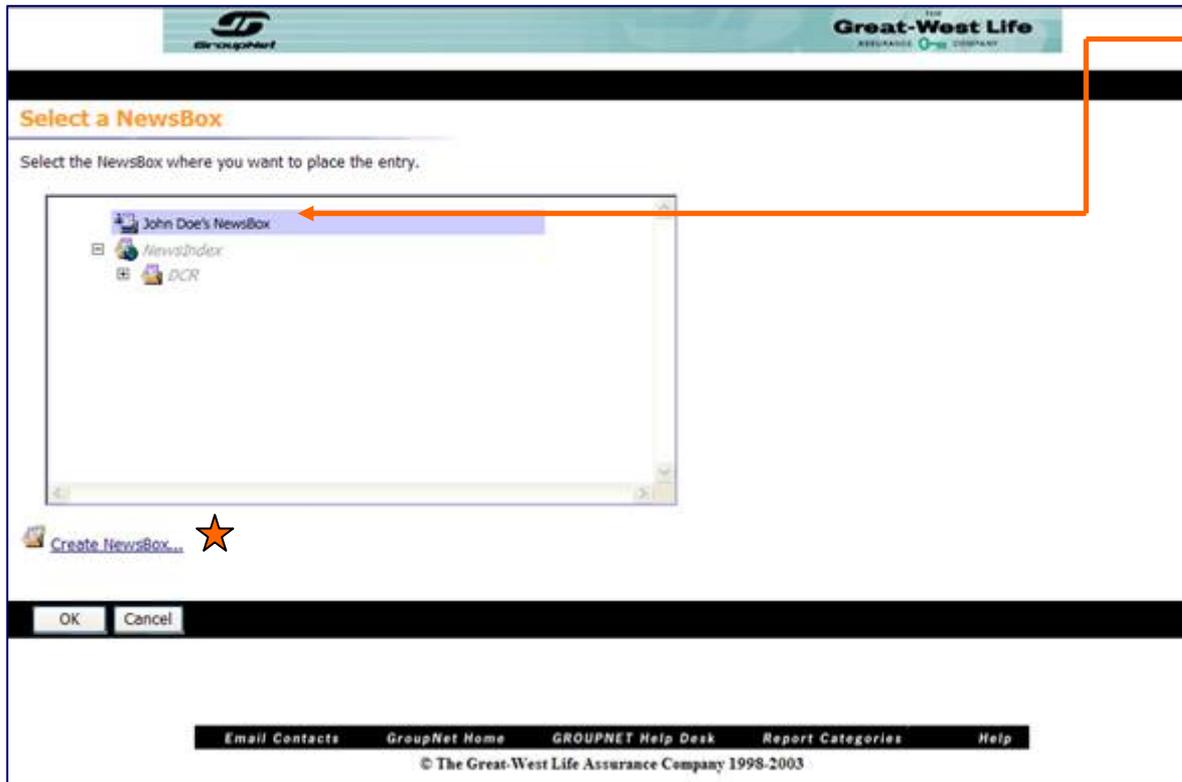
Selecting the NewsBox to Save Your Report in

Advanced options to help organize your personal NewsBox.

GroupNet for Plan Administration

You have an option to save the report in the default NewsBox or click the "Create NewsBox" link to create a new folder in your NewsBox.

Creating folders can help to organize your reports by keeping them separated from each other. You can use the naming convention for each folder to help in this organization process.



Your Guide to Disability Claims Reporting

Creating a new NewsBox

GroupNet for Plan Administration

Specify the name of your new NewsBox – for example, you may wish to create a separate NewsBox for each policy number or benefit type. After you have done that, simply click OK.

New NewsBox

Specify the name and location of the entry.

Name:

Description:

Destination NewsBox:
NewsIndex > Personal NewsBoxes > Melanie Stadnyk (melst)'s NewsBox [Other NewsBox](#)

★

Email Contacts GroupNet Home GROUPNET Help Desk Report Categories Help
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Your Guide to Disability Claims Reporting

Finding your new NewsBox

GroupNet for Plan Administration

Your new NewsBox is found here.

The screenshot displays the GroupNet for Plan Administration interface. At the top, the GroupNet logo and 'Great-West Life' branding are visible. The main content area is titled 'Claims Management Reporting' and includes a 'New', 'Edit', and 'View' menu. Below this, there are several report categories, each with a folder icon and a description: 'Claim Listing Reports' (Folder containing claim listings), 'Claimant Management & Inquiry' (Folder containing Claimant reports), 'Download Databases' (Folder containing download reports), 'Duration Reports', 'Management and Activities Summary' (Folder containing management reports), and 'Service Reports' (Folder containing service reports). On the left, an 'Index' sidebar lists various NewsBoxes, including 'John Doe's NewsBox', 'ABC Company', and 'Claims Management Reporting'. An orange arrow originates from the 'ABC Company' link in the Index and points to the 'Claims Management Reporting' main content area. At the bottom, a navigation bar contains links for 'Email Contacts', 'GroupNet Home', 'GROUPNET Help Desk', 'Report Categories', and 'Help'. The footer text reads '© The Great-West Life Assurance Company 1998-2003'.

Your Guide to Disability Claims Reporting

Disability Claims Reporting FAQ's – 1 of 2

**GroupNet for
Plan Administration**

Clicking on a question will take you to the appropriate place in the eTour. If you have any questions that do not appear here, you can get assistance by calling the Group Help Desk at (800) 665-2648.

[How do I get into the disability Claims Management Reporting facility? \(Page 2\)](#)

After logging into GroupNet, click on the "Experience and Claims Information" banner button and then click the link "Claims Management Reporting" beside the Disability header.

[Where can I see what reports are available? \(Page 3\)](#)

You can select folders on either the left or right pane to find the reports.

[What criteria can I use for running the various reports? \(Page 15\)](#)

The criteria varies by report, but for the most part you are allowed to specify the policy, date range, division, class and product type. Some reports allow you to specify claim status(es) as well.

[How can I run the report for just specific divisions and classes? \(Page 6\)](#)

When selecting the criteria for your report, you can hold down the "CTRL" key on your keyboard and use your mouse to select the specific divisions and classes you want.

[How can I save time when running reports? \(Page 8\)](#)

Requested reports will start generating as soon as you click the "Process Report" button. You can choose to wait for the report to come up, or click the "Save the report as a new entry" link. This continues to generate the report, but behind the scenes in your NewsBox. At this point, you can run other reports or just choose to do something else on your PC while you're waiting.

Your Guide to Disability Claims Reporting

Disability Claims Reporting FAQ's – 2 of 2

**GroupNet for
Plan Administration**

[How can I view the saved reports that I've run? \(Page 11\)](#)

These reports will all stay in your NewsBox for 90 days in which you can access them at any time. Retrieving the reports is quick because they were already generated in the past.

[What if I want to keep my reports longer than 90 days? \(Page 13\)](#)

Any report that you run (whether to screen or to your NewsBox) can be saved outside of GroupNet to your PC or network as either a PDF or Excel file (depending on the type of report). If you plan on referencing a report several times within a month, it could be handy to run it once and access it right from your PC or network.

[What if I make a mistake with my report criteria? \(Page 8\)](#)

After the report starts running you will see a link on the screen that says "Cancel and return to source". Click this and your report will stop generating and you will be taken back to the report selection screen.

[What other options do I have for navigating back within the facility? \(Page 12\)](#)

If you haven't clicked the "Process Report" button yet, then you can use the regular 'Back' button in your browser to return to previous screens. If the report has already run and you're viewing it on your screen, you can click the 'Return to source' icon in the bottom right. Quite often at this point, using the 'Back' button on your browser may not work properly and is not recommended.

Disability Claims Reporting

Overview of the Disability Reports



Operational System

Beginning in July of 2000, Great-West Life's Disability Management Services organization began implementing a new operational system used to track, maintain, and manage information with respect to the disability management process. With over 17,000 Long-Term Disability claims and 33,000 Short-Term disability claims to be converted to this new system, implementation will last to the end of 2001.

Our new operational system is called the Disability Claims Tracking system, and it makes the electronic gathering of information part of the process of managing a disability claim. Information that in the past was only kept in paper files, will now be captured within this system. This is going to open new doors for Client Reporting, and will make the disability management process more transparent to our customers. This will help ensure that Great-West customers are aware of what is being done to manage their claims.

Reports

Historically, GroupNet has had disability reports that focused primarily on financial information. With the data from our new operation system, we will be expanding the nature of the information that we will be providing. Currently, the reports that have been developed from this system are as follows (click on any of the blue highlighted reports for a brief description):

[Assessment & Management Summary](#)

This report provides a high level summary of the activities taken to both assess and manage claims, a summary of the open claims in terms of prognosis, and some high level financial information.

[Claim Assessment Listing](#)

Gives a claim by claim listing that provides key pieces of information related to the assessment of the disability.

[Claim Management Activities Listing](#)

After a claim has been assessed, and the disability case manager knows what they are dealing with, an action plan can be struck to manage the claim. This report is a claim by claim listing of some of the key management activities being taken on each claim.

[Financial Listing](#)

After the assessment is done, and the management plan is in place, as long as a claim is accepted then payments need to be made. This report gives a claim by claim listing of payments.

[Claimant Management Report](#)

This report gives the user all of the claim information for a particular claimant on one page, and can be used for inquiry purposes.

[Time to Decision Service Report](#)

Every Accepted or Declined claim is listed with dates relevant to break down the time to decision. Summaries and averages for the report are also given.

[Service Turnaround Report](#)

This report provides high level summaries and averages of the time required to deliver a written response to customers' incoming mail. Correspondence type is broken down into five general categories.

[Duration Report](#)

Grouped by duration, the time elapsed from claim acceptance to termination, a summarized table is generated with five categories within each time band.

[Download Reports](#)

These "reports" have no formatting. All information is in columns to allow it to be downloaded for manipulation by the user.



Disability Claims Reporting

Assessment & Management Summary Report



Why Would I Want to Use this Report?

To get a high level picture of what is happening on your claims block, in terms of the number of claims handled over the report period, what the outlook for the open claims is, and what has been done to manage those claims.

User Defined Criteria Selections

You select the Policy, Division, and Benefit class, and Report Month you are interested in getting some information on. You also select the product type (depending on what products Great-West is providing for you!) – Long Term Disability, Short Term Disability, or Adjudication Only.

You can maximize the value of the criteria selections by:

- Running the report over two different time periods to compare statistics over time.
- Focusing on a specific division or benefit class to see which areas of your company are generating the most interesting statistics to you

What's On this Report?

Claim Block Movement Summary: the number of claims open at the beginning of the report period, plus new claims, less terminations gives the number of claims open at the end of the period.

Decision Summary: the number of pended claims at the beginning of the report period, plus claims received in the period, less accepted claims, less declined claims gives the number of claims awaiting a decision at the end of the period.

Prognosis Summary (Open Claims): gives the number of open claims in each prognosis category to give the user a sense of the overall outlook for the claims block.

Management Activities (Open Claims): tells the reader what has been done to manage the claims. This needs to be read with the prognosis and duration statistics in mind.

Other Income Statuses (Open Claims): lets the reader know how many claims are eligible for payments under other income programs – key information as this is a main source of savings to the plan.

Financial Summary: provides the total gross benefit amounts, other income savings, and net charged amount to the plan over the report period.

Claim Management Phase (Open Claims): basically tells the reader the complexity and/or management level applied to the open claims. This puts the management activities summary into a good broad context.

Relationship to Other Reports

The following Claim Listing reports provide claimant by claimant details behind the summary statistics on this report:

- [Claim Assessment Listing](#)
- [Claim Management Activities Listing](#)
- [Financial Listing](#)



Assessment & Management Summary Report



Client Name: GENCO OLIVE OIL
Policy: 12345
Division(s):
Class(es):
Report Month: Jun-01
Benefit: LTD

Claim Block Movement

Open at Beginning of Period: 165
+ Accepted in Period: 0
+ Re-Opened in Period: 1
- Terminated in Period: -1
+ /(-) Multiple Transactions*: 0
Open at the End of Period: 165

Decision Summary

Pend at Beginning of Period: 0
+ Received in Period: 3
- Accepted in Period: 0
- Declined in Period: 0
+ /(-) Multiple Transactions*: 0
Pending at End of Period: 3

Prognosis Summary (Claims Open at End of Period)

Expected to Recover in Normal Convalescence Period: 0
Not Expected to go beyond STD Benefit Period: 0
Expected to Return to Gainful Employment: 34
Not Expected to Return to Own Job: 3
Not Expected to be Gainfully Employable: 75
Unknown - under investigation: 53

Claim Management Phase (Open Claims at End of Prd)

Maintenance (Recovery Unlikely): 39
Complex Management: 81
Straightforward Management: 13
Short Dur; Minimum Management: 32
Unassigned: 0

Management Activities (Open Claims at End of Period)

Rehab Referrals: 43
Medical Coordination Referrals: 0
Specialist/Functional Evaluations: 7
Medical/Activity Evaluations: 2

Other Income Statuses (Open Claims at End of Period)

	Estimated/			
	Approved	Pending	Denied	N/A
CPP/QPP:	105	7	37	16
Workers Comp:	2	11	2	150
Rehab Income:	0	0	0	165
Pension Income:	0	0	0	165
Auto Ins:	1	3	0	161

Financial Summary (Totals for Report Month)

Total Gross Benefit:	\$349,087
CPP/QPP:	-\$76,492
Workers Comp:	-\$6,327
Rehab Income:	\$0
Pension Income:	\$0
Auto Ins:	\$0
Other:	-\$9,235
Sub-Total Other Income:	-\$92,054
Net Charged to Plan:	\$257,033

* More than one change in claim status within the month prevents certain claims to be categorized in this summary.

Disability Claims Reporting

Claim Assessment Listing



Why Would I Want to Use this Report?

You are provided with both summary statistics throughout the report, and claim by claim information that lets you see the details behind the Assessment of the Disability. This is a good starting point to understand how claims are managed, since the Great-West Disability Case Manager needs to know what they are working with before deciding on management plan. This report gives you insight into that process.

User Defined Criteria Selections

You select the Policy, Division, and Benefit class, Report Month, and Product type you are interested in getting some information on.

The greatest advantage in criteria selection with this report is to isolate the claims you are interested by selecting the Claim Status (Accepted, Pending, Terminated, Declined, or Received in Period) at both the beginning and the end of the reporting period you have chosen. You can select any combination of Status at both the beginning and end of the report period to narrow your search to achieve any objectives you need. Or, just select all claims and see a full listing.

As examples, you can maximize the value of the criteria selections by:

- Selecting only claims that were received in the time period you have selected to see what assessment activities may have been completed, and what the decision outcome has been.
- Selecting claims that were Pending at the beginning of the report period, to see what the prognosis of these claims are, and what the eventual outcome at the end of the report period was.

What's On this Report?

Plan Provision Information: tells you the waiting period start and end dates for the claimant, the benefit period start and end dates, and the Own Occupation definition of disability expiry date (for LTD only).

Assessment Information: starts by letting the reader know the status of the assessment, whether the person is disabled from their own job, if the disability is as a result of a re-occurring condition, whether the disability was as a result of a work related condition, and what the expected duration of the disability is.

Prognosis: tells the reader what the outlook for a particular claimant is. This should be read in conjunction with the expected duration if applicable.

Claim Status Reason: lets the reader know why the claim may have been accepted, declined, pending, or terminated.

There are also summaries of prognosis, and of claim status changes given on the report.

Relationship to Other Reports

This report gives the detail behind some of the summary statistics on the [Assessment & Management Summary](#) report. Information on this report may want to be correlated with information from the [Claim Management Activities Listing](#) report and the [Financial Listing](#) report. Or, you could view our [Claimant Management Report](#) for a particular claimant to see all of the information associated with that claimant on one report (pending and accepted claims only).



Claim Assessment Listing



Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Plan Provisions			Disability Assessment					Claim Status				
			Waiting Period Start	End	Benefit Period Start	Max Date	Own Occ Defn Exp	Status Date	Own Job	Reocc Cond	Work Cond	Expected Dur'tn	Status	Date	
Status at Beginning of Period: Accepted															
Status at End of Period: Accepted															
Division: 1 Class: 1															
* E000010026	Corleone, Vito	110068071	Feb/29/00	Aug/28/00	Aug/29/00	Sep/16/10	Aug/28/02	Complete	Jun/06/01	Yes	N/A	No	Not specified	Accepted	Sep/20/00
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 66 Elemental Sales & Service Occupations											Re-Opened Claim: No				
Division: 2 Class: 2															
* E000011036	McCluskey, Sargeant	110025493	Oct/20/98	Apr/19/99	Apr/20/99	Oct/13/17	Apr/19/01	Complete	May/10/01	Yes	N/A	No	Not specified	Accepted	May/09/00
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 72-73 Trades & Skilled Transport & Equipment Operators											Re-Opened Claim: No				
* E000011450	Barzini, Don	110025568			Feb/17/99	Sep/07/25	Feb/16/01	Complete	Jun/22/01	N/A	N/A	No	Not specified	Accepted	May/09/00
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E000010449	Corleone, Santino	110072676	Feb/01/00	Jul/31/00	Aug/01/00	Dec/02/24	Jul/31/02	Complete	Jun/27/01	N/A	N/A	No	Not specified	Accepted	Nov/13/00
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: Plan provisions satisfied				
Occupation: 11 Professional Occupations in Business & Finance											Re-Opened Claim: No				
* E000010014	Adams, Kay	110570240	Nov/23/00	May/23/01	May/24/01	Sep/28/08	May/23/03	Complete	Jun/12/01	Yes	N/A	No	Not specified	Accepted	Apr/17/01
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: Plan provisions satisfied				
Occupation: 64 Intermediate Sales & Service Occupations											Re-Opened Claim: No				
* E000012185	Corleone, Fredo	110602621	Nov/30/00	May/30/01	May/31/01	Dec/07/30	May/30/03	Complete	Jun/08/01	Yes	N/A	No	9 Months	Accepted	May/04/01
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: Plan provisions satisfied				
Occupation: 12 Skilled Administrative & Business Occupations											Re-Opened Claim: No				
Division: 3 Class: 3															

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

This report is confidential, and has been designed to aid in the administration of the group benefit plan. Only authorized benefit plan administrators may view this information.

Claim Assessment Listing



Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Plan Provisions					Disability Assessment					Claim Status		
			Waiting Period Start	Waiting Period End	Benefit Period Start	Benefit Period Max Date	Own Occ Defn Exp	Status	Status Date	Own Job	Reocc Cond	Work Cond	Expected Dur'tn	Status	Date
* E464658741	Brasi, Luca	664125412	Oct/03/98	Apr/02/99	Apr/03/99	Jun/06/20	Apr/02/01	Complete	Jun/11/01	Yes	N/A	No	Not specified	Accepted	May/09/00
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E916475864	Sollozzo,TheTurk	825469741	Aug/11/98	Feb/08/99	Feb/09/99	Nov/23/18	Dec/31/01	Complete	Mar/16/01	Yes	Yes	No	24 Months	Accepted	Mar/16/01
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E565698541	Woltz, Jack	945612458	Sep/07/99	Mar/06/00	Mar/07/00	Jan/09/30	Mar/06/02	Complete	Jun/28/01	Yes	N/A	No	Not specified	Accepted	Jun/07/00
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E3214785411	Tattaglia, Phillip	846213654	Apr/29/00	Oct/27/00	Oct/28/00	Apr/07/23	Oct/27/02	Pending	Jun/18/01	N/A	N/A	No	Not specified	Accepted	Feb/22/01
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E698547123	Hagen, Tom	741258963	Jun/08/00	Dec/06/00	Dec/07/00	Oct/19/16	Dec/06/02	Complete	Jun/07/01	Yes	N/A	No	Not specified	Accepted	Mar/01/01
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E541239874	Tessio	999541236	Jul/06/00	Jan/03/01	Jan/04/01	Nov/09/28	Jan/03/03	Complete	Jun/11/01	Yes	N/A	No	Not specified	Accepted	Dec/20/00
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				
* E915469874	Clemenza	654712546	Jul/04/00	Jan/01/01	Jan/02/01	Jan/14/14	Jan/01/03	Complete	Jun/04/01	N/A	N/A	No	Not specified	Accepted	Feb/08/01
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 66 Elemental Sales & Service Occupations											Re-Opened Claim: No				
* E412365897	Fontane,Johnny	954236784	Sep/16/00	Mar/16/01	Mar/17/01	Jan/07/25	Mar/17/03	Complete	Jun/26/01	Yes	N/A	No	Not specified	Accepted	Apr/06/01
Prognosis: Unknown - under investigation											Claim Status Reason: Plan provisions satisfied				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

This report is confidential, and has been designed to aid in the administration of the group benefit plan. Only authorized benefit plan administrators may view this information.

Claim Assessment Listing



Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Plan Provisions			Disability Assessment				Claim Status	
			Waiting Period Start	Waiting Period End	Benefit Period Start	Benefit Period Max Date	Own Occ Defn Exp	Status	Own Job	Reocc Cond	Work Cond

14 Claims were Accepted at the Beginning of the Report Period:

End of Period Status

Prognosis Summary

Terminations: 0 Accepted: 14 Declined: 0 Pending: 0 Expected to Recover/RTW: 6 Not Expected to be Employable/Return to Own: 0 Unassigned: 8

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

This report is confidential, and has been designed to aid in the administration of the group benefit plan. Only authorized benefit plan administrators may view this information.

Claim Assessment Listing



Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Plan Provisions			Disability Assessment					Claim Status	
			Waiting Period Start	Waiting Period End	Benefit Period Start	Benefit Period Max Date	Own Occ Defn Exp	Status	Status Date	Own Job	Reocc Cond	Work Cond

Status at Beginning of Period: In Period Activity

Status at End of Period: Pending

Division: 2 **Class:** 2

E123456789	Greene, Moe	987654321	Feb/20/01	Aug/20/01	Aug/21/01	Feb/14/17	Aug/20/03	Complete	Jun/28/01	Yes	N/A	No	9 Months	Pending	Jun/19/01
Prognosis: Expected to return to own job or gainful employment											Claim Status Reason: New claim				
Occupation: 14 Clerical Occupations											Re-Opened Claim: No				

1 Claim was First Assigned a Status in the Report Period:

End of Period Status

Prognosis Summary

Terminations: 0 **Accepted:** 0 **Declined:** 0 **Pending:** 1 **Expected to Recover/RTW:** 1 **Not Expected to be Employable/Return to Own:** 0 **Unassigned:** 0

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

This report is confidential, and has been designed to aid in the administration of the group benefit plan. Only authorized benefit plan administrators may view this information.

Disability Claims Reporting

Claim Management Activities Listing



Why Would I Want to Use this Report?

After the Disability Case Manager has completed an Assessment of the disability, a plan to manage that disability can be put into action. This report will show the management activities that have been taken

User Defined Criteria Selections

You select the Policy, Division, and Benefit class, Report Month, and Product type you are interested in getting some information on.

The greatest advantage in criteria selection with this report is to isolate the claims you are interested by selecting the Claim Status (Accepted, Pending, Terminated, Declined, or Received in Period) at both the beginning and the end of the reporting period you have chosen. You can select any combination of Status at both the beginning and end of the report period to narrow your search to achieve any objectives you need. Or, just select all claims and see a full listing.

As examples, you can maximize the value of the criteria selections by:

- Selecting only claims that were accepted in the report period to see what management approaches have been initiated.
- Select closed claims in the report period to see if whether certain management approaches may have resulted in a claim being terminated.

What's On this Report?

Claims are managed from essentially three viewpoints (evaluation, return to work, and financially), so information is presented this way as well:

Evaluation Indicators: are “Yes/No” indicators to say whether medical or specialist evaluations of the claim have occurred.

Rehab and Medical Coordination Referral Indicators: are similarly “Yes/No” indicators. These indicators say whether the claim has been referred to a Rehab Specialist or a Medical Coordinator in an effort to understand the potential for an early return to work. These are just indicators as to whether a referral was made, not whether Rehab or Medical Coordination was actually pursued.

Other Income Statuses: give the reader an indication of the financial management activities in place to minimize the cost to the disability plan, if the disability plan is second payer.

To put the management activities into a context, the prognosis and claim management phase are included on this report. This makes sense, as the cost of intensive management needs to be weighed opposite the benefit; claims of expected short duration may be expected to have less intensive management.

Relationship to Other Reports

This report gives the detail behind some of the summary statistics on the [Assessment & Management Summary](#) report. Information on this report may want to be correlated with information from the [Claim Assessment Listing](#) report and the [Financial Listing](#) report. Or, you could view our [Claimant Management Report](#) for a particular claimant to see all of the information associated with that claimant on one report (pending and accepted claims only).



Claim Management Activities Listing



Group Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Mgmt Phase	Management Activities **				Other Income Statuses						
				Med. Eval.	Spec. Eval.	Rehab. Referral	Med. Coord. Ref.	C/QPP	Workers Comp	Rehab Income	Pension	Auto Ins.	Other	
Status at Beginning of Period: Accepted														
Status at End of Period: Accepted														
Division: 1 Class: 1														
* E798401200	Corleone, Vito	951423654	Straight Fwd Mgmt	Yes	N/A	N/A	N/A	Status:	Denied	N/A	N/A	N/A	N/A	N/A
Prognosis:		Unknown - under investigation												
Division: 2 Class: 2														
* E966001247	McCluskey,Sargeant	874569854	Complex Mgmt	N/A	Yes	N/A	N/A	Status:	Approved	N/A	N/A	N/A	N/A	N/A
Prognosis:		Unknown - under investigation												
* E987400213	Barzini, Don	545412365	Complex Mgmt	Yes	N/A	N/A	Yes	Status:	Pending	N/A	N/A	N/A	N/A	N/A
Prognosis:		Unknown - under investigation												
* E000010449	Corleone, Santino(Sonny)	458741254	Complex Mgmt	Yes	N/A	Yes	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A
Prognosis:		Expected to return to own job or gainful employment												
* E021021254	Adams, Kay	845412365	Straight Fwd Mgmt	N/A	N/A	N/A	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A
Prognosis:		Expected to return to own job or gainful employment												
* E956412387	Corleone, Fredo	852369741	Complex Mgmt	Yes	N/A	N/A	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A
Prognosis:		Expected to return to own job or gainful employment												
Division: 3 Class: 3														
* E852146321	Brasi, Luca	845698745	Straight Fwd Mgmt	Yes	N/A	N/A	N/A	Status:	Approved	N/A	N/A	N/A	N/A	N/A
Prognosis:		Unknown - under investigation												
* E646451234	Sollozzo,TheTurk	321456987	Complex Mgmt	Yes	N/A	Yes	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A
Prognosis:		Expected to return to own job or gainful employment												

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

** Management Activity indicators are as of the end of last month for the report period, and reflect activities since claim inception. Not all activities are reportable to protect claimant rights to privacy.

Claim Management Activities Listing



Group Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Mgmt Phase	Management Activities **				Other Income Statuses							
				Med. Eval.	Spec. Eval.	Rehab. Referral	Med. Coord. Ref.	C/QPP	Workers Comp	Rehab Income	Pension	Auto Ins.	Other		
* E565441102	Woltz, Jack	845471000	Complex Mgmt	Yes	N/A	Yes	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A	
Prognosis:		Expected to return to own job or gainful employment													
* E995123341	Tattaglia, Phillip	882511364	Complex Mgmt	Yes	Yes	Yes	Yes	Status:	N/A	N/A	N/A	N/A	N/A	N/A	
Prognosis:		Unknown - under investigation													
* E798522214	Hagen, Tom	220136450	Complex Mgmt	Yes	N/A	N/A	Yes	Status:	N/A	N/A	N/A	N/A	N/A	N/A	
Prognosis:		Expected to return to own job or gainful employment													
* E003214569	Tessio	880541236	Complex Mgmt	N/A	N/A	N/A	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A	
Prognosis:		Unknown - under investigation													
* E994655123	Clemenza	797445100	Complex Mgmt	Yes	N/A	Yes	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A	
Prognosis:		Unknown - under investigation													
* E880025413	Fontane, Johnny	995120041	Complex Mgmt	Yes	N/A	Yes	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A	
Prognosis:		Unknown - under investigation													

14 Claims were Accepted at the Beginning of the Report Period

End of Period Status (for this report)	Claim Management Phase	Claim Management Activities
Terminations: 0 Accepted: 14 Declined: 0 Pending: 0	Active: 11 Straight Fwd: 3 Maintenance: 0	Med Eval: 11 Spec Eval: 2 Rehab Ref: 6 MC Ref: 3

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

** Management Activity indicators are as of the end of last month for the report period, and reflect activities since claim inception. Not all activities are reportable to protect claimant rights to privacy.

Claim Management Activities Listing



Group Client Name: GENCO OLIVE OIL CO.

Group Policy: 123456

Report Month: Jun

Benefit: LTD

Employee ID	Name	Portfolio ID	Mgmt Phase	Management Activities **				Other Income Statuses				
				Med. Eval.	Spec. Eval.	Rehab. Referral	Med. Coord. Ref.	C/QPP	Workers Comp	Rehab Income	Pension	Auto Ins.

Status at Beginning of Period: In Period Activity

Status at End of Period: Pending

Division: 2 **Class:** 2

E465432184	Greene,Moe	554123654	Straight Fwd Mgmt	N/A	N/A	N/A	N/A	Status:	N/A	N/A	N/A	N/A	N/A	N/A
Prognosis:		Expected to return to own job or gainful employment												

1 Claim was First Assigned a Status in the Report Period:

End of Period Status (for this report)	Claim Management Phase				Claim Management Activities			
Terminations: 0 Accepted: 0 Declined: 0 Pending: 1	Active: 0	Straight Fwd: 1	Maintenance: 0		Med Eval: 0	Spec Eval: 0	Rehab Ref: 0	MC Ref: 0

* Claim was converted to the new reporting environment, and data may contain default values. Please see help documentation for details.

** Management Activity indicators are as of the end of last month for the report period, and reflect activities since claim inception. Not all activities are reportable to protect claimant rights to privacy.

Disability Claims Reporting

Financial Listing



Why Would I Want to Use this Report?

At the end of the day, bottom line financial impact may drive the need for reporting more than anything else. This report will show the claimants that have had disability payments made to them over the period selected, and the associated amounts. Demographic information is also given with each claim to see if there is any correlation between accepted claims (with resultant financial implications), and underlying demographic data.

User Defined Criteria Selections

You select the Policy, Division, and Benefit class, and Time Period. You can also select whether you are interested in looking at Short-Term Disability or Long-Term Disability claims. As Great-West does not actually pay Adjudication Only claims, there will not be any financial information associated with claims of this type (you will still get a listing, but the dollar amounts will all be zero).

With this report, you can narrow your search criteria by selecting the claim status at the end of the report period (Accepted or Terminated). This can be useful in narrowing down which claims there is continuing liability on, versus completed claims.

What's On this Report?

Demographic Information: such as age of claimant, occupation, gender, province, and duration of disability help the reader discover whether there are any underlying demographic factors that are an influence over plan costs.

Financial Information: starts by showing the Gross Benefit amount payable over the report period selected. Then, income offsets and the associated savings to the plan over the report period are shown. Finally, the net benefit amount represents the amount charged to the plan's experience (i.e. the net financial liability paid over the report period).

There are also summaries given for each Division listed on the report, as well as for each Claim Status at the end of the report period.

Relationship to Other Reports

The ability to narrow the report search criteria by Claim Status can be useful in correlating information to other reports. For example, claims that are open at the end of the report period might be compared to the [Claimant Management Report](#) to see what is being done to manage the claim. Or, the report might be compared to the [Claim Assessment Listing](#) or the [Claim Management Activities Listing](#) to see the major activities undertaken to understand the claim and its management.



Disability Financial Listing



Group Client Name: GENCO OLIVE OIL
Group Policy: 123456
Report Period From: Jun-01 **To:** Jun-01
Benefit: LTD

		Demographic Information					Financial Information							
Employee ID	Age at	Date	Duration			Gross	Other Income					Net Chgd		
Portfolio ID	Name	Dis.	of Dis.	Gender	(Months)	Prov.	Benefit	C/QPP	WCB	Rehab	Auto	Pension	Other	to Plan
Division: 1														
Class: 1														
E012345678	Truman,Peter	54	Feb/26/00	Male	16	Que	\$1,882	\$0	\$0	\$0	\$0	\$0	\$0	\$1,882
112365782	Occupation: Elemental Sales & Service Occupations							Claim Status at End of Period:			Accepted			
Division 1 Totals:							\$1,882	\$0	\$0	\$0	\$0	\$0	\$0	\$1,882
Division: 2														
Class: 2														
E164521312	Foster,Jodie	49	Feb/20/01	Female	4	Que	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
1124749658	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E164522123	Starling,Clarice	37	Aug/19/98	Female	34	Ont	\$1,481	\$0	\$0	\$0	\$0	\$0	\$0	\$1,481
119456214	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E995123645	Hopkins,Tony	46	Oct/20/98	Female	32	Que	\$2,719	-\$895	\$0	\$0	\$0	\$0	\$0	\$1,824
445698523	Occupation: Trades & Skilled Transport & Equipment Operators							Claim Status at End of Period:			Accepted			
E164523123	Bill,Buffalo	57	Nov/23/00	Male	7	Ont	\$2,471	\$0	\$0	\$0	\$0	\$0	\$0	\$2,471
115478552	Occupation: Intermediate Sales & Service Occupations							Claim Status at End of Period:			Accepted			
E164523654	Alfredo,Ted	34	Nov/30/00	Female	7	Que	\$1,852	\$0	\$0	\$0	\$0	\$0	\$0	\$1,852
115400124	Occupation: Skilled Administrative & Business Occupations							Claim Status at End of Period:			Accepted			
E112365000	Nicholas,Saint	40	Feb/01/00	Female	16	Ont	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
115421452	Occupation: Professional Occupations in Business & Finance							Claim Status at End of Period:			Accepted			
Division 2 Totals:							\$8,523	-\$895	\$0	\$0	\$0	\$0	\$0	\$7,628
Division: 3														
Class: 3														

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Disability Financial Listing



Group Client Name: GENCO OLIVE OIL

Group Policy: 123456

Report Period From: Jun-01 **To:** Jun-01

Benefit: LTD

		Demographic Information					Financial Information							
Employee ID		Age at	Date	Duration			Gross	Other Income					Net Chgd	
Portfolio ID	Name	Dis.	of Dis.	Gender	(Months)	Prov.	Benefit	C/QPP	WCB	Rehab	Auto	Pension	Other	to Plan
E123456789	Lindman,Abe	36	Jul/06/00	Female	11	Ont	\$2,177	\$0	\$0	\$0	\$0	\$0	\$0	\$2,177
987654321	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E021458963	Wilson,Woody	51	Jul/04/00	Male	11	Ont	\$1,496	\$0	\$0	\$0	\$0	\$0	\$0	\$1,496
236501475	Occupation: Elemental Sales & Service Occupations							Claim Status at End of Period:			Accepted			
E654521365	Nicol,Rick	48	Jun/08/00	Male	12	Ont	\$2,418	\$0	\$0	\$0	\$0	\$0	\$0	\$2,418
184545236	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E995689654	Bush,Jason	43	Oct/03/98	Female	32	Ont	\$1,673	-\$800	\$0	\$0	\$0	\$0	\$0	\$873
115423651	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E995641236	Rosealen ,Frank	40	Sep/16/00	Female	9	Ont	\$2,824	\$0	\$0	\$0	\$0	\$0	\$0	\$2,824
142563987	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E116452365	Washington,Geoff	39	Jan/27/00	Female	0	Ont	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
142598745	Occupation: Technical & Skilled Occupations in Art, Culture, Recreation & Sport							Claim Status at End of Period:			Terminated			
E956632147	Clugman,Bill	34	Sep/07/99	Female	21	Que	\$2,111	\$0	\$0	\$0	\$0	\$0	\$0	\$2,111
856475214	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E995698563	Reasonn,Ron	42	Apr/29/00	Female	14	Ont	\$2,255	\$0	\$0	\$0	\$0	\$0	\$0	\$2,255
995641236	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
E852369741	Carter,James	44	Aug/11/98	Male	34	Que	\$2,380	\$0	\$0	\$0	\$0	\$0	\$0	\$2,380
123654123	Occupation: Clerical Occupations							Claim Status at End of Period:			Accepted			
Division 3 Totals:							\$17,334	-\$800	\$0	\$0	\$0	\$0	\$0	\$16,534
Report Totals:							\$27,739	-\$1,695	\$0	\$0	\$0	\$0	\$0	\$26,044

Disability Claims Reporting

Time to Decision Service Report



Why Would I Want to Use this Report?

Timely service is critical to both our customers, and to the plan members that need to make use of the disability insurance program. Ensuring timely service is a priority for all stakeholders, as the financial security of a plan member may be at stake. This report shows each stakeholder's role in determining the time to decision.

User Defined Criteria Selections

Like all of our reports on GroupNet, you select the Policy, Division, and Benefit class, and Time Period of interest.

For the most part, service statistics will be of interest at the Policy level. Generally, Policy and Time Period will likely be the most frequently requested variables.

What's On this Report?

Dates that Information was Received: lets the reader see when both the Employee and Employer claim forms are received, when any required medical information was received.

Communication Items to Gather Information: gives an indication of how many times follow-ups were required to collect necessary information. If this statistic gets too big, it can point toward process problems of some nature.

Benefit Effective Date: when compared to the date all information was collected, yields the lead time over which a decision can be made before a claimants potential income stream is impacted.

Time to Decision: is ultimately the key statistic tracked on the report. This is measured from the date the last piece of information was received to when a decision was made.

Summary statistics on the report will show the average time to collect information, the average lead time, and the average time to decision for the entire report period. These averages are then broken down by some key variables that help explain the overall result – such as whether a claim was ultimately accepted or declined, the average amount of lead time available to make a decision, and the average number of communication items to collect information.

Relationship to Other Reports

This report gives the detail for each Accepted or Declined claim behind the time to decision. This information can also be found for Accepted claims on the [Claimant Management Report](#). The [Service Turnaround Report](#) provides a high level summary of Great-West's response time to all customers' mail correspondence.



Time to Decision Report



Group Client Name: GENCO OLIVE OIL

Group Policy: 12345

Division(s): 1, 2, 3, 4, 5

Benefit Class(es): 1, 2, 3, 4

Time Period: 6/30/01 To: 6/30/01

Benefit: STD

Summary Results for Report

	All Claims	Outcome		Lead Time		Notification Time		Communication Items			
		Accepted	Declined	None	1-30 Days	30+ Days	< 30 Days	30+ Days	< 4 Items	4 - 6 Items	7+ Items
Number of Claims	11	9	2	10	1	0	10	1	10	1	0
Information Collection											
Average Notification Time (days)	14	17	4	16	2	0	12	38	14	15	0
Average Time to Collect Info (days)	4	1	21	5	0	0	5	0	4	5	0
Total: Time to Collect Info from Dis Date (days)	19	17	25	20	2	0	17	38	19	20	0
Average Communication Items to Collect	2.27	2.22	2.49	2.30	2.00	0.00	2.30	2.00	2.10	4.00	0.00
Average Lead Time (days)	0	0	0	0	1	0	0	0	0	0	0
Average Time to Decision (days)	5	5	4	5	9	0	5	4	5	2	0
Total Time since Notification (days)	9	6	25	9	9	0	10	4	10	7	0

Claimant Name	Claim ID	Div.	Class	Date of Disability	Employee	Employer	Information Collection		Time to Collect		Cash Gap Mgmt		Decision			
							Attending Physician	Other Med. Info.	Earliest Date	Latest Date	Benefit Effective Date	Lead Time	Decision Date	Time to Dec.		
Rahija,Boris	112333546	1	1	Apr/27/01	Jun/04/01	Jun/04/01	Jun/04/01	Jun/04/01	Jun/04/01	38	0	38	Apr/30/01	0	Jun/08/01	4
Number of Communication Items to Get Info:					1	1	0	0	Total Comm. Items:	2						
Kushner,Mike	154784596	1	1	May/31/01	Jun/08/01	Jun/08/01	Jun/08/01	Jun/08/01	Jun/08/01	8	0	8	Jun/03/01	0	Jun/14/01	6
Number of Communication Items to Get Info:					1	1	0	0	Total Comm. Items:	2						
Ratajczak,Henry	455647895	1	1	Jun/03/01	Jun/11/01	Jun/11/01	Jun/11/01	Jun/11/01	Jun/11/01	8	0	8	Jun/06/01	0	Jun/13/01	2
Number of Communication Items to Get Info:					1	1	0	0	Total Comm. Items:	2						
Swimm,Gerald	123554412	1	1	May/23/01	Jun/13/01	Jun/13/01	Jun/13/01	Jun/13/01	Jun/13/01	21	0	21	May/26/01	0	Jun/20/01	7
Number of Communication Items to Get Info:					1	1	0	0	Total Comm. Items:	2						

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Time to Decision Report



Group Client Name: GENCO OLIVE OIL

Group Policy: 12345

Division(s): 1, 2, 3, 4, 5

Benefit Class(es): 1, 2, 3, 4

Time Period: 6/30/01 **To:** 6/30/01

Benefit: STD

Zimba,Mark	223654789	1	1	Jun/11/01	Jun/13/01	Jun/13/01	Jun/13/01	Jun/13/01	Jun/13/01	Jun/13/01	Jun/13/01	2	0	2	Jun/14/01	1	Jun/22/01	9
				Number of Communication Items to Get Info:		1	1	0	0	Total Comm. Items:		2						
Maljkovic,George	123451245	1	1	May/30/01	Jun/14/01	Jun/14/01	Jun/14/01	Jun/19/01	Jun/14/01	Jun/19/01	Jun/19/01	15	5	20	Jun/04/01	0	Jun/21/01	2
				Number of Communication Items to Get Info:		1	1	0	2	Total Comm. Items:		4						
Cavallaro,Luigi	885462147	1	1	May/25/01	Jun/19/01	Jun/19/01	Jun/19/01	Jun/19/01	Jun/19/01	Jun/19/01	Jun/19/01	25	0	25	May/28/01	0	Jun/28/01	9
				Number of Communication Items to Get Info:		1	1	0	0	Total Comm. Items:		2						
Scott,Gordon	456855213	1	1	May/29/01	Jun/20/01	Jun/20/01	Jun/20/01	Jun/20/01	Jun/20/01	Jun/20/01	Jun/20/01	22	0	22	Jun/01/01	0	Jun/26/01	6
				Number of Communication Items to Get Info:		1	1	0	0	Total Comm. Items:		2						
Montgomery,William D.	112321566	1	1	Jun/15/01	Jun/26/01	Jun/26/01	Jun/26/01	Jun/26/01	Jun/26/01	Jun/26/01	Jun/26/01	11	0	11	Jun/18/01	0	Jun/29/01	3
				Number of Communication Items to Get Info:		1	1	0	0	Total Comm. Items:		2						

Decision Outcome: *Declined*

Klukan,Karel	474129985	1	1	Apr/21/01	Apr/27/01	Apr/27/01	Jun/08/01	Jun/08/01	Apr/27/01	Jun/08/01	Jun/08/01	6	42	48	Apr/24/01	0	Jun/11/01	3
				Number of Communication Items to Get Info:		1	1	1	0	Total Comm. Items:		3						
Ziomick,James	546588574	1	1	May/28/01	May/31/01	May/31/01	May/31/01	May/31/01	May/31/01	May/31/01	May/31/01	3	0	3	May/31/01	0	Jun/05/01	5
				Number of Communication Items to Get Info:		1	1	0	0	Total Comm. Items:		2						

Disability Claims Reporting

Service Turnaround



Why Would I Want to Use this Report?

Claim management is a multi-faceted process, requiring a high degree of communication to stakeholders. Information flow helps determine the effectiveness of the management process, and this report helps keep track of the timeliness of the flow of information.

Some information needs to be turned around quickly, while other pieces may be of a lower priority or take longer to assess. This report shows both the average communication turnaround times and a breakdown into the ranges in which they occur.

User Defined Criteria Selections

Like all of our reports on GroupNet, you select the Policy, Division and Benefit Class, Time Period, and Product of interest.

For the most part, service statistics will be of interest at the Policy level. Therefore, Policy and Time Period will likely be the most frequently requested variables.

What's On this Report?

Number of Items: A count of all communication occurrences where the completion date falls within the time period selected.

Average Turnaround: Turnaround days is the number of days between when the communication was received and when it was completed. Reporting is based on calendar days, not business days, to reflect an external perception of service delivery.

Distribution of Turnaround Times: Several things can impact turnaround times, including completion of required internal activities and the prioritization of incoming mail.

- Depending on the type of mail item, internal activities can include:
 - Telephone contact with the claimant, employer, physician, etc.
 - Referral to our Medical Board
 - Review by a Medical Coordinator, Team Manager, or other expert
 - Recalculation of benefits
- Incoming mail is prioritized by addressing the following questions:
 - Is there a decision pending?
 - Is there a potential change in claim status as a result of this item?
 - Does this item assist in expediting a return to work?
 - Are benefits currently suspended awaiting this information?

Time service reporting reflects one aspect of the claims service delivery. Other aspects of disability management not reflected in this report include:

- Prompt, accurate adjudication decisions
- Proactive claim management planning
- Effective return to work planning

Relationship to Other Reports

This report gives a high level summary of the communication items required to adjudicate all claims. The [Time to Decision Service Report](#) shows the detail behind the time to decision for each Accepted or Declined claim.



Date: 05/02/2003

Service Turnaround Report



Group Client Name: GENCO OLIVE OIL

Group Policy: 12345

Divisions: 1, 2, 3, 4

Classes: 1, 2, 3, 4, 5

Time Period: Jan-03 to Jan-03

Benefit: LTD

Communication Type	No. of Items	Avg Turnaround (Calendar Days)	Distribution - % Between:			
			0 and 7 Days	8 and 14 Days	15 and 21 Days	22+ Days
New Claim Correspondence	1	4.00	100%	0%	0%	0%
Medical Correspondence	61	12.03	33%	31%	28%	8%
Specialist Correspondence	38	9.61	42%	37%	21%	0%
Other Income Offset Information	3	12.33	0%	100%	0%	0%
General Correspondence	25	9.00	52%	12%	36%	0%
Report Totals	128	10.66	39%	30%	27%	4%

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Disability Claims Reporting

Duration



Why Would I Want to Use this Report?

To generate an overall snapshot of disability statistics including the number of claims, total days of disability, average days of disability, total dollars paid and average dollars paid. Each of these five categories are reported in a summarized table and grouped by duration.

This table allows you to quickly see where the bulk of disability claims fall. Over time, you will be able to compare results and identify any improvements or deterioration in claim life times.

User Defined Criteria Selections

Like all of our reports on GroupNet, you select the Policy, Division and Benefit Class, Time Period, and Product of interest.

For the most part, claim duration statistics will be of interest at the Policy level. Therefore, Policy and Time Period will likely be the most frequently requested variables.

What's On this Report?

Duration of Disability: the time elapsed from the date of disability to the termination date of the claim, in weeks, months or years. The duration report only contains claims that were closed within the selected reporting period. Within each duration band, five categories are displayed:

- **Number of Claims:** is a count of the claims closed within the selected reporting period.
- **Total Days of Disability:** is the total number of days of disability, including the waiting period, for all claims terminated within the specified time band.
- **Average Days of Disability:** is calculated by dividing the total days of disability by the number of claims in that period.
- **Total Dollars Paid:** is the total amount paid to claimants from acceptance, whose claim terminated within the specified time period.
- **Average Dollars Paid:** is calculated by dividing the total dollars paid by the number of claims in that period.

Relationship to Other Reports

This report gives a summary of some of the detailed financials found on the [Financial Listing](#) report. The duration of a claim can potentially be affected by a wide array of circumstances. For instance, the approach and activities taken to manage the claim can impact duration. The [Claim Assessment Listing](#) report can be referenced to help understand how claims are managed. In addition, the [Claim Management Activities Listing](#) provides a further breakdown by claimant of the management activities that have been taken.



Duration Summary Report



Group Client Name: GENCO OLIVE OIL

Group Policy Number: 12345

Divisions: 1, 2, 3, 4, 5

Classes: 1, 2, 3, 4, 5

Time Period: Dec-03 to Dec-03

Benefit: LTD

Duration of Disability	Number of Claims	Total Days of Disability	Average Days of Disability	Total Dollars Paid	Average Dollars Paid
Weeks: 0 - 3	8	141	17.6	\$4,186.49	\$523.31
4 - 6	23	690	30.0	\$33,630.28	\$1,462.19
7 - 10	21	1104	52.6	\$52,070.30	\$2,479.54
11 - 17	20	1750	87.5	\$97,453.26	\$4,872.66
18 - 26	13	1885	145.0	\$99,258.42	\$7,635.26
Months: 7 - 9	13	2858	219.8	\$86,580.73	\$6,660.06
10 - 12	7	2243	320.4	\$63,489.96	\$9,069.99
13 - 18	8	3473	434.1	\$63,047.26	\$7,880.91
19 - 36	11	8348	758.9	\$226,507.78	\$20,591.62
Years: 4 - 5	1	1258	1258.0	\$43,047.85	\$43,047.85
6 - 7	0	0	0.0	\$0.00	\$0.00
8 - 10	1	3077	3077.0	\$19,813.07	\$19,813.07
Over 10	2	8178	4089.0	\$59,641.47	\$29,820.74
Report Totals:	128	35005	273.5	\$848,726.87	\$6,630.68

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Disability Claims Reporting

Claimant Management Report



Why Would I Want to Use this Report?

The Claimant Management Report pulls all the relevant information from all of the listing reports onto one spot for a particular claimant. This report has two primary functions:

- First, to provide greater detail on the management activities in progress, or being planned to manage Accepted or Pended claims.
- Second, this report is updated weekly and can be used as an inquiry type report. The plan sponsor can get current information to help answer questions that a plan member on claim may direct to them first.

User Defined Criteria Selections

Like all of our reports on GroupNet, you select the Policy, Division, and Benefit class. You can also select to see the most recent information, or go back in time up to 8 weeks to see prior Claimant Management reports.

As one of the uses of the report is for it to be used as an inquiry report, you can locate information for a specific claimant by entering an Employee ID, or by the First Letter of the Last Name. If no individual claimant criteria are entered, then the report would have multiple pages – one for each claimant. This may not be a bad option if there are only a few claims.

What's On this Report?

Basic Claimant Information: shows some basic demographic information like date of birth, province, and occupation.

Basic Claim Information: such as the status of the claim, the claim type, benefit provisions (i.e. waiting periods, & maximum benefit date) are shown.

Claim Assessment: activities and outcome are shown for the claim. Included are such things as the expected duration of claim, whether the claim was referred for Rehab, what the prognosis is, and whether medical coordination was involved.

Most Recent Management Activities: shows the plan for managing the claim, and what the status of each activity is.

Diary Actions: show upcoming events to execute the management plan, including target dates for completion.

Payment Information: if applicable, shows the date of the last payment, what time periods were covered by the payment, and the components of the actual payment amount to the claimant.

Basically, this report is a claimant by claimant playbook for what is being done to assess the claim and manage the claim.

Relationship to Other Reports

This report gives the detail for each Accepted or Pending claim, and brings it all together on one report. Much of this information is also found on each of the following listing reports:

- [Claim Assessment Listing](#)
- [Claim Management Activities Listing](#)
- [Financial Listing](#)

In many cases, the reader might start with one of the above Listing reports and get the additional detail needed for a particular claimant on this report.



Claimant Management Details



Employee Name: Adams,Sam

Employee ID: 123456789 *

Portfolio Number: 987654321

Claimant Information

Group Policy 123456	Division: 7	Benefit Class: 5
Gender: Male	Province: Ontario	Date of Birth: Apr/20/47
Occupation: 14 Clerical Occupations		

Basic Claim Information

Claim Type: LTD	Current Claim Status: Accepted	<i>Other Claims being Managed</i>						
Date of Disability: Dec/22/97	Claim Status Date: Mar/23/98	<table border="1"> <thead> <tr> <th>Type</th> <th>Status</th> <th>Status Date</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Type	Status	Status Date			
Type	Status	Status Date						
Benefit Effective Date: Mar/23/98	Claim Status Reason: Plan provisions satisfied							
Maximum Benefit Date: Apr/19/12								
Definition Change Date: Mar/23/00								

Claim Assessment

Assessment Date: Mar/09/01	Assessment Status: Complete
Employment Assessment Initiated: Yes	Reason (if no): Not specified
Medical Coordinator: No	Reason (if no): Treatment and duration are appropriate
Rehab Consultant Referral: Yes	Reason (if no): Not specified
Prognosis: Expected to return to own job or gainful employment	
Expected Return to Work:	
Claim Mgmt Phase: Maintenance Mgmt	
Disabled From Own Job: Yes	
Expected Duration: Not specified	

Other Income Status

C/QPP:	Approved
Workers Comp:	Not applicable
Rehab Income:	Not applicable
Auto Ins. :	Not applicable

Most Recent Portfolio Management Activities (up to 5)

Activity Type	Activity SubType	Status	Date
Provider Plan	Internal rehabilitation	Completed	Mar/09/01
Claim Referral	Assessment review	Completed	Mar/09/01

Upcoming Diary Actions (up to 5)

Diary Description	Target
Request maintenance update	Feb/01/02

Payment Information

Benefit Status: Not specified	Benefit Status Reason: Not specified		
Date of Last May/17/01	Payment from May/01/01	Payment to May/31/01	
Gross Amount - Offset Amounts = Charged to Plan - Taxes - Deductions = Amount Paid to Claimant			
\$2,310.36	(\$648.74)	\$1,661.62	(\$380.75) \$0.00 \$1,280.87

* Claim was converted to the new reporting environment, and some data may contain default values. Please see the help documentation for details.

Disability Claims Reporting

Download Reports



Why Would I Want to Use this Report?

Although we have targeted to create a robust and meaningful set of standard reports, there may be times where you simply want the raw data – for example:

- To feed data into your own systems
- To organize data in a different manner to do customized analysis
- To create summaries not shown on a standard GW report

Our standard reports have been formatted to make them easy to use and read. But, there is a tradeoff between making a report “look good”, and being able to download the information. Plus, the download report pulls together information from each of our claim listing reports into one spot; so you don’t have to.

User Defined Criteria Selections

Like all of our reports on GroupNet, the Download reports will you select the Policy, Division, Benefit class, and time period.

There are two versions of the Download report, one with financial information and one without. You select the version most appropriate for your needs.

What’s On this Report?

All of the information from each of the Claim Listing type reports is included in this one report.

Relationship to Other Reports

This report pulls the information from each of the following claim listing reports into one spot, and depicts the information in a database type format.

- [Claim Assessment Listing](#)
- [Claim Management Activities Listing](#)
- [Financial Listing](#)

