Compensator to Compensator and TPA to Compensator transfer

Support Guide

Compensator to Compensator transfer

Support Guide

Before a liability decision has been made on a claim, the Compensator will be able to transfer the claim to a different Compensator within the portal. A TPA can also pass a claim to another Compensator.

When on the claim overview page the option to transfer a claim will be under 'My other actions'. The user will need to select 'Transfer claim to another compensator'

My other actions
The following options are available:

Update claim information

Transfer claim (within own organisation)

Assign claim ownership

Change defendant contact details

Remove this claim from portal

Transfer claim to another compensator

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For a TPA transferring a claim they will need to click on the option to 'Transfer claim to a compensator'.

My other actions

The following options are available:

Update claim information

Transfer claim (within own organisation)

Assign claim ownership

Change defendant contact details

Remove this claim from portal

Transfer claim to a compensator

Update policy details

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On the next screen the user will need to select the Compensator they wish to pass the claim to and provide a reason for transfer, reference number, their name and job title. There is also an option to provide the name of the policyholder. This may be useful for the other Compensator if the responsible driver is not the policyholder.

Enter compensator details

*Note that all fields marked with * are mandatory.*

Claimant name	Accident date	Defendant VRN
Test Test	**18/08/2024-18:17**	**Z452AAQ**
Portal reference	Claim created date	
OIC-10-24-2002	**04/10/2024**	

Provide the name of Policyholder

Choose a compensator from the list *

Reason *

Remaining: 500 characters

Reference number *

Name *

Job title *

[Confirm and Send] [Cancel]

When selecting the Compensator the user wishes to pass the claim to, they will need to start typing in the name of the Compensator and select them from the dropdown list.

Choose a compensator from the list *

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The record of the transfer will now show in the 'Transfer Requests' workbasket.

We will now look at how the Compensator the claim is being passed to can review the transfer request.

The request will come in to the 'Transfer Requests' workbasket. A 'New' tag will show on the record.

When the user clicks on the record, they will be taken to this screen showing them a summary of the transfer. They will need to select 'Continue' to make a decision.

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The user will then see this screen detailing the information provided by the Compensator or TPA who raised the transfer. The documents from the claim will also be available for review. When rejecting the request, the user will need to provide a reference number and their name and job title. There is also an option to leave comments.

Manage transfer request

*Note that all fields marked with * are mandatory.*

Claimant name **Test Test**	Accident date **18/08/2024-18:17**	Defendant VRN **Z452AAQ**
Portal reference **OIC-10-24-2002**	Claim created date **04/10/2024**	

Deadline for liability response **09/10/2024**	Claim transfer request date **04/10/2024**	Policy holder ——

Training Compensator suggests this claim should be allocated to your organisation and has supplied the following information along with the below documents.

Test

Small claim notification form
OIC-10-24-2002_SCNF_04-10-2024 12-03.pdf

Defendant small claim notification form
OIC-10-24-2002_DSCNF_04-10-2024 12-03.pdf

You need to decide if you accept or reject the proposal. If you Accept, the claim will be auto routed to you and will appear in your work queue. If you Reject, Training Compensator will be told.

Comments

Remaining: 500 characters

Response*
○ Accept transfer
○ Reject transfer

Reference number*

Name*

Job title*

Confirm and Send   Cancel

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We will now look at what the Compensator or TPA attempting to transfer the claim will see once the request has been rejected.

Under the 'Transfer Requests' workbasket a 'New' tag will display next to the record to show that there has been an update.

	Case ID	Claimant name	Accident date	Portal reference	Organisation name (Transferred from)	Organisation name (Transferred to)	Status (Transfer case status)
New	TFR-10-24-1001	Test Test	18/08/2024	OIC-10-24-2002	Training Compensator	Marshall Insurers	Open-TransferRejected

My Team's Work | My Organisation's Work | Resolved Claims | My Recent Work | Transfer Requests

↑↓↑ Show filters Refresh

When the use has opened the record, they will see the below summary screen. They will need to select 'Continue' to acknowledge the rejection.

Transfer request

Claimant name
Test Test

Accident date
18/08/2024-18:17

Defendant VRN
Z452AAQ

Portal reference
OIC-10-24-2002

Claim created date
04/10/2024

Deadline for liability response
09/10/2024

The transfer request associated with OIC-10-24-2002 is rejected by Marshall Insurers.

Continue

Close

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On the next screen the user will see the confirmation of rejection and will need to select 'Close' to acknowledge this.

Confirmation of rejection

Claimant name	Accident date	Defendant VRN
Test Test	**18/08/2024-18:17**	**Z452AAQ**

Portal reference	Claim created date
OIC-10-24-2002	**04/10/2024**

Marshall Insurers rejected your transfer request and provided the following comments:

Close

A transfer history document will be generated detailing what has happened.

Small claim notification form

OIC-10-24-2002_SCNF_04-10-2024 12-03.pdf

Defendant small claim notification form

OIC-10-24-2002_DSCNF_04-10-2024 12-03.pdf

Transfer history

OIC-10-24-2002_TransferHistory_04-10-2024 13-11.pdf

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We will now look into how a Compensator can accept a transfer request.

Once the user has selected to accept the transfer, they will still need to provide a reference number and their name and job title alongside any comments that they wish to leave. Alongside this, they will have the option to provide the name of the policyholder and the policy number. They will need to click 'Confirm and send'. Once this has been completed the claim will move to their workbasket.

Response *

(●) Accept transfer

( ) Reject transfer

Provide the name of Policyholder

[   ]

Policy number

[   ]

The Compensator or TPA who have transferred the claim will again see the 'New' tag alongside the record in the 'Transfer Requests' workbasket. They will once again see a summary page when they click on the record and need to select 'Continue'.

Transfer request

Claimant name	Accident date	Defendant VRN
Test Test	**18/08/2024-18:17**	**Z452AAQ**
Portal reference	Claim created date	
OIC-10-24-2002	**04/10/2024**	
Deadline for liability response	Claim transfer request date	
09/10/2024	**04/10/2024**	

The transfer request associated with OIC-10-24-2002 is approved by Marshall Insurers.

Continue

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They will then see the confirmation of transfer screen. They will not need to do anything else and the system will transfer the claim to the other Compensator.

Confirmation of transfer

Claimant name	Accident date	Defendant VRN
Test Test	**18/08/2024-18:17**	**Z452AAQ**
Portal reference	Claim created date	
OIC-10-24-2002	**04/10/2024**	

Claim transfer request date
04/10/2024

Marshall Insurers approved your transfer request and the claim has been transferred to them and see below comments provided (if any):

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