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General Information

Overview
Claim Status is your portal to the electronic claim file. As a comprehensive, real-time claim management system, it provides access to claim details, claim events, financials and adjuster notes.

Availability and Updates
Claim Status is available on the Travelers internet site. It may be accessed Monday through Friday from 5 a.m. – 11:30 p.m. ET. It is also available on the first, third and fourth Saturday of the month from 5 a.m. – 8:30 p.m. Additionally, it is available on the first, third and fourth Sunday of the month from 12 p.m. – 8:30 p.m.

The status of the claim (open/closed), payments, notes and the New Claims roster reflect real-time updates from our Claim department. Other information is updated every 24-48 hours.

Disclaimer
This material does not amend, or otherwise affect, the provisions or coverages of any insurance policy or bond issued by Travelers. It is not a representation that coverage does or does not exist for any particular claim or loss under any such policy or bond. Coverage depends on the facts and circumstances involved in the claim or loss, all applicable policy or bond provisions, and any applicable law.

Privacy and Legal Notice Links
The Privacy Statement provides information regarding the collection and disclosure of our customers’ personal information. The Legal Notice sets forth the terms and conditions under which The Travelers Companies, Inc. provide the information on this web site, as well as the terms and conditions governing your use of this site.

Customer Support
If you are an AgentHQSM agency user, please contact Agency Automation at 800.842.2522 for assistance.

If you are a RMIS customer or broker, please contact your Information Account Executive or call 860.277.5800.

If you are a Travelers employee, please contact the Technology Support Center (TSC).

If you have a question related to a specific claim, please contact the claim professional listed in the Claim Details.

Trademarks
Internet Explorer, Windows, Word and Excel are registered trademarks of Microsoft Corporation.
Other brands and their products are trademarks or registered trademarks of their respective holders and should be noted as such.

**Logging on Options**
Claim Status can be accessed using your standard Internet connection.

**Logging Off**
To log off of Claim Status, close the browser by clicking the X in the top right hand corner or by selecting File – Close or File – Exit.

**Automatic Time Out**
If the system is inactive for 28 minutes, you will receive a time out warning message. If the system is inactive for more than 30 minutes, you will automatically be logged off. You will be redirected to log on again.
Home Page
Welcome to the Claim Status home page, your gateway to real-time claim information. Here you can access a claim file, view rosters, track claim activity with My Diary, launch learning tools and link to other important sites, services and resources. Additionally, you will find a broadcast message containing important notifications regarding system updates and availability followed by whom to contact if you need assistance.

Access a Claim
There are two ways in which you can access a claim file. The first is by using the Quick Claim Access feature by entering the claim number and clicking on Go To Claim. You are immediately routed to the Claim Details of the claim number you entered.
If you do not know the claim number, simply use the Advanced Search feature and search by the Claimant Name, Claimant SSN or Driver Name. When searching by Claimant Name or Driver Name, enter the first two or more letters of the individual’s last name (e.g., Sm or Smith).

Additional search options are also available to help you narrow in on a claim with a specific accident date, the status of the claim (whether the claim is open or closed), line of insurance (workers compensation, auto liability, general liability, etc.) or organization code. When you are satisfied with your selections, click on Apply to generate a list of claims that meet your criteria. The list displays the Claim Number, File Prefix, Claimant Name, Organization Code, Accident Date and Line of Insurance. From this list, you can click on the claim number to access Claim Details. To return to the list of claims, close the window containing Claim Details.
## Field | Comment
--- | ---
Accident Date | To input different dates, use the calendar feature to select a date or delete the default values and type the new value in MMDDYYYY format (The system will add the forward slashes for you). The date range may not exceed 10 years.
Claim Status | To view only open claims or only closed claims, select the appropriate text from the drop down menu.
Line of Insurance | To narrow your search to a specific line of insurance, use the drop down arrow to make a selection.
Organization Code | This optional field can be up to 15 characters.
  - To include any value in a given position, use “$”, which is a wildcard. For example, $$$45$$$ will include 0164522 and 1324555.
  - Use a wildcard at the end of a series of numbers to include all values that start with the same sequence. For example, 12345$ will include 12345778 and 12345992.
Rosters
Quickly view a list of New, Out of Work or Restricted Duty claims by clicking on each of the tabs.

If you have a question on a claim, contact the Claim Professional who is identified within Claim Details.

New Claims
The New Claims roster is a real-time listing of claims that were recently reported. The criteria, run date and the number of rows displayed is recorded at the top of the grid. The roster displays LOB (Line of Business), Claimant Name, Claim Number, File Prefix, Accident Date, Date Reported to Employer, Date Notice Received (reported to Travelers) and State. For workers compensation claims, the Claimant Name is the employee’s name. For auto liability, the Claimant Name is the driver name. For general liability claims, the Claimant Name is the first claimant. The default sort is by Major Line of Insurance and then Date Notice Received with the most recent claim listed at the top. By clicking on a category heading such as Claimant Name, the information will be resorted in ascending order. Click on the category heading a second time and the information will be resorted in descending order. To view the details of a particular claim, click on the claim number. The report can be exported to Excel by clicking on Export or printed by clicking on Print, which will transfer the report to a printable PDF file.

- Claims fall off this roster roughly 7 days after the File Prefix is assigned.
- Any new claims without a loss designator assigned will appear on the roster regardless of the dates selected. Claims that are not on the Claim database yet will not appear on this roster. This situation is more likely if you are using a short, recent timeframe and the claim was reported on a Friday, Saturday or Sunday. To see these claims, try running the roster again the next business day using a longer time frame.
- Additional selections are available on the report options menu that allows you to limit your roster to STD (Short Term Disability), LTD (Long Term Disability) and FMLA (Family Medical Leave Act) claims.
- Actual RTW with Restrictions;
- Actual RTW with Permanent Restrictions;
- Will Never Return to Work.

Changes to the Out of Work roster data may take 24-48 hours to be reflected in the report. Due to this delay, the values shown may vary from those contained in Claim Details. This listing contains Claimant Name, Claim Number, Accident Date, Date Reported (to Travelers), Last Day Worked, Status Date and Work Status. The claims are listed in order of Claimant Name. Click on any of the data headings to re-sort the information in ascending order. Click the heading a second time to re-sort in descending order. To view the details of a particular claim, click on the claim number. This report can be exported to Excel by clicking on Export. Click on Print to convert the report to a printable PDF file.
Restricted Duty
The Restricted Duty roster identifies open workers compensation claims where the employee has been released to return to work with restrictions or modifications. Changes to the Restricted Duty roster data may take 24-48 hours to be reflected in the report results. The values shown may vary from that contained in the Claim Details, as a result of this delay. A claim will remain on the roster until a return to work status change occurs. If the employee stops working, their claim will be moved to the Out of Work roster. This roster displays Claimant Name, Claim Number, Accident Date, Date Reported (to Travelers), Last Day Worked and Status Date. The claims are listed in order of Claimant Name. Click on any of the data headings to re-sort the information in ascending order. Click the heading a second time to re-sort in descending order. This report can be exported to Excel by clicking on Export. Click on print to convert the report to a printable PDF file.
**Report Options**

Expanding the report options menu allows you to limit the data you want to include in the roster and select a sort option. If you do not make any selections, all values will be included and the default sort will applied. The limiting and sorting options vary based upon the roster selected.

<table>
<thead>
<tr>
<th>Roster</th>
<th>Limits</th>
<th>Sorts</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Claims</td>
<td>Organization Code</td>
<td>Adjusting Office Code</td>
</tr>
<tr>
<td></td>
<td>Adjusting Office Code</td>
<td>Organization Code</td>
</tr>
<tr>
<td></td>
<td>State Abbreviation</td>
<td>Subsidiary</td>
</tr>
<tr>
<td></td>
<td>Line of Insurance</td>
<td></td>
</tr>
<tr>
<td>Out of Work</td>
<td>Organization Code</td>
<td>Adjusting Office Code</td>
</tr>
<tr>
<td></td>
<td>Adjusting Office Code</td>
<td>Benefit State</td>
</tr>
<tr>
<td></td>
<td>State Abbreviation</td>
<td>Organization Code</td>
</tr>
<tr>
<td></td>
<td>Accident Date</td>
<td>Policy Year</td>
</tr>
<tr>
<td></td>
<td>Work Status</td>
<td></td>
</tr>
<tr>
<td>Restricted Duty</td>
<td>Organization Code</td>
<td>Adjusting Office Code</td>
</tr>
<tr>
<td></td>
<td>Adjusting Office Code</td>
<td>Benefit State</td>
</tr>
<tr>
<td></td>
<td>State Abbreviation</td>
<td>Organization Code</td>
</tr>
<tr>
<td></td>
<td>Accident Date</td>
<td>Policy Year</td>
</tr>
<tr>
<td></td>
<td>Work Status</td>
<td></td>
</tr>
</tbody>
</table>

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![ACCOUNT NAME, 000012345](image1)

![ACCOUNT NAME, 000012345](image2)

![ACCOUNT NAME, 000012345](image3)

0 Claims: Results current as of 06/07/2016 01:35 PM

No claims found
Viewing the Data in Excel
The data in any roster can be automatically converted and displayed in Excel. Simply click on Export at the top of the roster. When the conversion is complete, Excel will open and display the data from the roster.

- The speed at which data is converted and displayed is based on the speed of your PC.
- Column headings are included.
- A new Excel workbook will be created for each roster.

My Diary
My Diary is a tool that allows you to track claim activity and tasks with daily reminders. You create the tasks and identify the due date. The Claim Status home page will prominently display the number of diary items due today in the top right hand corner. Click on the link to enter the My Diary feature.
**View My Diary Task List**

Upon entering My Diary, a list of tasks due today appears which includes any past due items. Using the Select View drop down, you can quickly view all tasks due or completed. You may also filter the tasks by Claim Number, Claimant Name, Line of Insurance, Account Name or Organization. Click apply to refresh the list once filters have been selected. The list shows when the task is Due (or Completed), Claim Number, Claimant, Category, Diary Text, LOI (line of insurance), Organization and Account. The Today and All Due views are sorted by the due date by default, with the oldest task first. The default sort of the Completed view is by the most recently completed date. Use the column headings to re-sort the data in ascending or descending order. Select rows, using the check box, to quickly mark one or more tasks as complete or to delete. Click on the claim number to access Claim Details. Click on the pencil on the right hand side of the grid to view or edit the diary entry.

**Add New Tasks**

On the My Diary screen, click on Add New Entry to add a new task. You will be prompted to enter information related to the claim that you wish to create a task for, such as Claim Number, Claimant Name, Accident Date, Category, Line of Insurance, Account Name, Organization, Diary Activity and Due Date. Diary Activity and Due Date are the only required fields, as denoted with a red asterisk. You have the option to mark the task as a priority, as well as set an email reminder. By checking the “Send to Me” box, your email address will be prefilled based on the email address associated with the logon ID you are using. You may edit this information to another email address if you prefer. Click on Save & Add Another or Save & Close to set the task.
You can also add a My Diary task from within the claim information (Claim Details, Claim Events, Financials or Notes). Click on the Add Diary Item icon in the upper right portion of the Claim Block to add a new entry for the claim you are currently viewing. By selecting My Diary while in the claim information, the system will complete certain fields for you. Claim Number, Accident Date, Line of Insurance and Account Name will automatically be populated for all lines of insurance. Claimant Name will also be populated for workers compensation claims.
Claim Details

Across the top of the Claim Details page is a red toolbar that allows you to navigate to the various pages of the claim information. To the right is a box where a new claim number can be entered; hitting return on your keyboard or the return arrow on the screen will refresh the page with the new claim number details. The double square icon will present Claim Details for the new claim number in a new tab. A link for Help is also available in the red toolbar.

Claim Details provides an overview of pertinent claim information. The page displays a claim block where vital information is contained, such as Claimant Name and Claim Number that is important to view while scrolling through other details of the file. A blue question mark appears next to File Prefix. This help feature describes the type of claim being viewed, such as indemnity or employers liability. Send an email by clicking on the claim professional’s name. The system will launch your email provider and prefill the subject line with the claim number, account name and claimant name (claimant name only appears for workers compensation claims).

Note: Benefit State will appear for workers compensation claims. Risk State will appear for auto liability, general liability and property claims.

More specific information related to the claim is viewable by using the scroll bar on the right or using the Jump To feature on the left. Jump To can be used in two ways: use the check boxes to select or deselect data sections you wish to view, or click on the category header to immediately view that data.

The information contained in the Claim Details can be printed or emailed by clicking on the appropriate icon in the top right hand corner. All of the items selected in the Jump To section will be included when using print or email. Due to the sensitive nature of some of the data items, restrictions apply to the fields that can be printed or emailed. Files cannot be attached to an email using the secured network.

Additionally, you can send an email to the claim professional by clicking on his/her name. By doing so, your email provider, such as Outlook or Gmail, will begin a new message with the claim number, account name and claimant name in the subject line.
**Claim Events**

Claim Events highlights important claim activities in a single view. Subject, Activity Date and Description are provided if applicable. The latest value entered, issued or changed is what is listed. The data can be sorted by Subject, Activity Date or Description by clicking on the column heading. The description of the claim events may contain a hyperlink to allow you to quickly navigate to the Milestones, Notes, Financials, Incurred Rationale, etc. Blue text denotes hyperlinks.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Activity Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Notice Received</td>
<td>06/23/2005</td>
<td>NOTICE OF LOSS VIEW</td>
</tr>
<tr>
<td>Status</td>
<td>06/23/2005</td>
<td>OPEN</td>
</tr>
<tr>
<td>Notes</td>
<td>04/21/2016</td>
<td>MEDICAL /</td>
</tr>
<tr>
<td>Total Incurred</td>
<td>06/07/2016</td>
<td>$603,705.00 INCURRED RATIONALE</td>
</tr>
<tr>
<td>Payment Issued</td>
<td>05/05/2016</td>
<td>($303.00) / EXPENSE</td>
</tr>
<tr>
<td>Resolution Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Status</td>
<td>06/09/2006</td>
<td>ACTUAL RETURN TO WORK FULL DUTY</td>
</tr>
<tr>
<td>Return to Work Target Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Claimant Attorney</td>
<td></td>
<td>TED SMALL OW ESQ</td>
</tr>
<tr>
<td>Controversed</td>
<td></td>
<td>MEDICAL</td>
</tr>
<tr>
<td>Milestone</td>
<td>04/05/2016</td>
<td>5IU REFERRAL ASSIGNED</td>
</tr>
<tr>
<td>Subrogation Status</td>
<td></td>
<td>NO</td>
</tr>
<tr>
<td>Credits</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Financials
A Financial Summary is displayed on the Financials page. Incurred, Paid, Credits, Net Total Paid and Outstanding Reserves are displayed by Kind or Pay Type. Clicking on the plus sign next to the Kind or Pay Type will expand the view to show the Type or Coverages that have been applied. Selecting the Include Claimants option (applies to auto liability, general liability and property) will display the financial data grouped by Claimant Number. Using the check boxes to the left of row headings will enable Payment Details and Incurred History. Selecting the check box next to Kind/Type or Pay Type/Coverage will select all. Financial information can be limited to a specific date range. Simply enter your desired date or use the calendar feature. Click Apply to refresh the list. Clicking on Export will convert this grid to an Excel file.

Payment details are available for all indemnity, expense, medical and if applicable, supplemental payments. The Payment Detail grid contains the Payment Kind, Type, Subtype, Amount, Check Number, Payee, Input Date, Input Status, From-To Dates, Credit/Debit and Bill Control Number. The number of rows with information is displayed at the top of the grid. The maximum number of rows per page is 500. When selecting a large number of payments that results in more than 500 rows, multiple pages will exist.

Claim Status Help 16 6/7/2016
Use the page number or next to navigate to the next page. When clicking on the plus sign next to a specific payment, an expanded view displays additional information. Click on Print to convert the selected payment to PDF. Click on Export at the bottom of the grid to export all payment details to Excel.
When viewing auto or general liability claims, an “Include Claimants” checkbox is incorporated above the financial grid. By making this selection, the financial summary grid will be display financials by claimant number.

An “Include Claimants” checkbox shows when you view auto or general liability claims. Checking this box will show the financial summary grid Claimant Number.

**Notes**

The notes page of the claim profile displays the adjuster’s notes contained on the file. The default filters are to show all topics over the course of one year from today’s date with the newest note first. These filters can be changed by selecting an option from the drop down menu for topic, sort and date range. Click apply to refresh the notes list. You may save these filter options as your default. The system will automatically save the default by the line of business for the claim you are viewing. At any time, click the reset button to return to the system default filters.

The notes on the page will be sorted by date in descending order with the most recent note on top. The Date and time the note was posted, Author, Topic, Subject and Free Form Subject are displayed, along with the contents of the note itself. To collapse a note, click on the minus sign between Date and Author. This will allow you to view just the heading of the note. To collapse all notes, click on the minus sign between Date and Author in the column heading.

If the number of notes exceeds the page limits, additional pages will be added. To view notes on subsequent pages, enter the page number or click next. This can be done from the top of the notes list or the bottom.
Use the Print icon to print selected notes, notes page or all notes.