

# Release 6 Web User Release Notes

September 2018





## Introduction

This document describes changes introduced in the WEB interface of Claims Portal system within Release 6

This document provides an overview of the changes that Web Users of the Claims Portal (the Portal) will see following the go-live date of Release 6 on **8 October 2018**.

Users should familiarise themselves with the changes prior to the Go Live date using their training accounts.



## Summary of changes affecting Web users

1. Reduction in number of timeout notifications
2. Deletion of claims
3. Introduction of new field 'Referral Source' for RTA claims
4. Max number of attachments
5. Organisation / Branch name & address
6. Global offers – cosmetic changes
7. Funding sections removed from CNFs
8. 'End of stage 2' retention period extended
9. Removal of draft CNFs
10. New user agreement



# 1. Reduction in number of timeout notifications

Notifications are messages either relating to a status change of a claim, or a warning that a deadline ('timeout') is approaching. Currently, the system generates multiple notifications when a timeout is approaching (5 days left, only in one phase; 3 days left; 1 day left).

In Release 6, the number of notifications for timeouts will be reduced by the removal of the 1-day notifications. By reducing the number of 'timeout' notifications, the number of records in the database should decrease to maintain the performance of the application.

The notifications that will no longer be generated are listed below:

- Liability decision for claim <applicationID>: 1 day left
- Stage 2.1 Interim Payment needed for claim <applicationID>: 1 day left
- Stage 2 Settlement Pack response needed for claim <applicationID>: 1 day left
- Stage 2 Additional Damages decision needed for claim <applicationID>: 1 day left (RTA only)
- Stage 2 Settlement Pack counter offer needed for claim <applicationID>: 1 day left

The following timeout notifications will continue to be generated:

- Liability decision for claim <applicationID>: 5 days left
- Liability decision for claim <applicationID>: time limit reached
- Stage 2.1 Interim Payment needed for claim <applicationID>: 3 days left
- Stage 2.1 Interim Payment needed for claim <applicationID>: time limit reached
- Stage 2 Settlement Pack response needed for claim <applicationID>: 3 days left
- Stage 2 Settlement Pack response needed for claim <applicationID>: time limit reached
- Stage 2 Additional Damages decision needed for claim <applicationID>: 3 days left (RTA only)
- Stage 2 Additional Damages decision needed for claim <applicationID>: time limit reached (RTA only)
- Stage 2 Settlement Pack counter offer needed for claim <applicationID>: 3 days left
- Stage 2 Settlement Pack counter offer needed for claim <applicationID>: time limit reached

All other notifications will remain. Visit ['Notifications'](#) for more details.



## 2. Deletion of claims

To ensure that Users are able to comply with any valid data subject request under GDPR Articles 16 - 18 (right to rectification, right to erasure ('right to be forgotten'), and right to restrict processing), a new function entitled 'Delete claim' has been introduced to the Claims Portal as part of Release 6.

A claim can now be deleted by either the Claimant Rep or the Compensator, at any stage and by either party. Once deleted it will remain in the Portal for two weeks. The exception is CNF drafts that can only be deleted by the Claimant Representative.

This function is intended to be used solely for GDPR purposes. We anticipate that its use will be very rare and is likely to apply only in exceptional circumstances e.g. where a User has inadvertently sent a CNF containing incorrect information about the data subject and the data subject wishes to exercise their right to rectification. As data processed in the Claims Portal will generally fall under the 'legitimate interests' basis for processing, we consider it unlikely that a valid request for erasure or to restrict processing could be made, although of course it is for Users to consider how to deal with any request they receive from data subjects in order to comply with their GDPR obligations.

A new profile, 'ADVANCED USER Delete Claims', is introduced to allow the access on the Administration site to the new functionality.



Usage of this new function will be closely monitored to ensure it is not misused.

You can find a User guide to the new functionality on <https://www.claimsportal.org.uk/processes/gdpr-deletion-of-claims/>.



### 3. Referral source information – RTA only

As part of Release 6, we are introducing a new mandatory field in the RTA CNF. The Claimant Representative will be required to indicate its referral source.

This field has been introduced following a recommendation made by the Insurance Fraud Taskforce ([Final Report, January 2016](#)).

The information in this field will not be sent to the Compensator. It is collected solely for the purpose of sharing the data with the IFB. It should be noted that although completion of this field is mandatory, provision of the referral source is not. The Claimant Representative can select the 'Prefer not to say' option if it does not wish to provide the referral source.

Referral Source Information

Please identify your referral source for this claim, by completing the drop down box. This information will not be disclosed to the Compensator.

Referral Source	<input style="width: 90%;" type="text" value="Regulated CMC"/>	CMC Name	<input style="width: 90%;" type="text"/>
		MOJ CMC Authorisation Number	<input style="width: 90%;" type="text" value="e.g. 1234567"/>

Possible values Referral Source field:

- Regulated CMC → the mandatory fields 'CMC Name' and 'MOJ CMC Authorisation Number' appear
- Existing Client
- Private referral
- Advertising (non – internet)
- Via firm's website
- Via Other website → the mandatory field 'Please specify which website' appears
- Other Source → the mandatory field 'Please specify which source' appears
- Prefer not to say



## 4. Max number of attachments

As part of Release 6 the number of attachments which can be added to a claim is changing.

We are introducing a limit to the number of attachments that can be added. The limit will be set to 40 for Claimant Representatives, and 10 for Compensators. The maximum file size of a 4MB limit will remain the same. The total limit of 20MB will also be retained.

This change has been brought about to maintain the performance of the system and limit instances where users have inadvertently added hundreds of attachments in error.

The User guide has been updated to include a new section on attachments. It gives detailed instructions on how to use the attachment functionality.

See <https://www.claimsportal.org.uk/claimant-representative/logging-in/attachments-and-notes/>.



## 5. Organisation / Branch name & address

As part of Release 6 and in response to security requirements the functionality relating to the organisation's name and address has been changed. This means that when creating a CNF, an organisation's name and address are automatically populated and cannot be amended as shown below:

Claimant's representative - contact details

Firm or Company Name CRIF Claimant Representative

Prefill with company details  
 Prefill with branch details

Company Address

House Name	Building2	Street 1	via fantin
Number	1-31	Street 2	11
Postcode	401311	District	d1
		Town/City	Bologna
		County	italy1
		Country	United Kingdom1

You can however add your branch details to the claim, by selecting 'Prefill with branch details', which will open up the Branch name address fields:

Claimant's representative - contact details

Firm or Company Name CRIF Claimant Representative

Prefill with company details  
 Prefill with branch details

Branch Name Bologna(Varignana)

Address

House Name	<input type="text" value="Varignana"/>	Street 1	<input type="text" value="Via Ca' Masino"/>
Number	<input type="text" value="611A"/>	Street 2	<input type="text"/>
Postcode	<input type="text" value="40024"/>	District	<input type="text"/>
	<input type="button" value="PAF Look Up"/>	Town/City	<input type="text" value="Bologna"/>
		County	<input type="text" value="Castel San Pietro Terme"/>
		Country	<input type="text" value="Italy"/>





## 6. Global offers – cosmetic changes

As part of Release 6, there is a small change to the wording on Stage 2 Settlement pack screens and PDF:

- The words (Global offer) have been inserted in brackets after 'Gross amount'.



## 7. Funding sections removed from CNFs

From Release 6 the 'Funding' section will be removed from the CNF. This affects the web interface and the generated PDFs.

Users will be aware that it is no longer required or used, it related to a funding system that was abolished in 2013.

### RTA:

Section L - No longer in use

**Section L** — No longer in use

### EL/PL:

Section F - No longer in use

**Section F** — No longer in use



## 8. 'End of stage 2' retention period extended

From Release 6, if a Court Proceedings Pack has been created, the claim will be kept for 12 months after the Court Proceedings Pack has been created.

The claim, its attachments and PDFs will be made available in the Archive section.

A new user profile will be introduced, which will be given access to the Archive section within the Administration console.

Please note that it will not be possible to work on the claim.

The user guide on the Claims Portal website has been updated to provide guidance how to use the new functionality.



## 9. Removal of draft CNFs

Prior the implementation of Release 6 on 8<sup>th</sup> October 2018, all draft claims will be identified and deleted. This is because there are changes to the contents of the CNFs.

If you have draft claims, we recommend that you progress these **by close of business on Friday 5 October 2018**.

Once we have removed the draft CNF, it will no longer be possible to search or find any reference to it or related documentation.

If you are unable to progress a draft CNF by this date, please print off a draft as you will need to re-enter and submit the claim.



## 10. New User Agreement

A new User Agreement has been released. All organisations will need to accept the new agreement in order to gain access to the Portal.

Existing organisation must accept the new agreement by the 8<sup>th</sup> October 2018, after which date access will be denied if the agreement has not been accepted.

The new agreement is available on the <https://www.claimsportal.org.uk/about/claims-portal-user-agreements/> website.

If the User Agreement is not accepted, access the Claims Portal will be denied and the following message presented:

**Your Login failed because your organisation has not accepted the Portal User Agreement. Please contact your internal System Administrator for further information.**