ALB

PI Portal (Agenda)
Version 2.5.0

Manage all PI Portal services and options through the familiar ALB interface.

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Contents

Personal Injury (Portal)

Introduction

Welcome to the Personal Injury (Portal) module.

This module is an out-of-the-box solution for operating the PI Portal through the familiar ALB interface for RTA claims upto £25,000. All Portal services and options available to the Claimant Representative (you!) are available through ALB.

This module currently deals with Stage 1 only of the Claimant side and it allows you to create, upload and process the claim via ALBto this point.

At present, this is an 'out-of-the-box' solution (with configurable permissions) but it is intended, at some future date, to expose Portal activities to allow configuration of screens, documents, logic and operation to suit your own preferences.

This feature is chargeable and if you would like to take advantage of it, please contact your account manager or call our Sales Team on 0844 815 5575.

PI Portal Process - Stage 1

Stage 1 Process

Stage 1 of the PI Portal covers entering and uploading the claim details, the acceptance (or rejection) of the claim by the other side and, if liability is admitted, payment is handled outside of the portal.

From the ALB Personal Injury (Portal) module, this process is broken down into the following steps. Click on the links to view details of each step.

- Attach Personal Injury (Portal) module to matter.
- Enter information via the pages under the Data tab.
- Produce a Claim Notification Form for client to verify data.
- Submit the claim to the PI Portal.

The Compensator picks up the claim from the PI Portal and decides whether to accept claim, pass it to another compensator or reject it.

- If the Compensator accepts the claim, a notification is sent to ALB. The Compensator compiles the Insurer First Response and makes the Liability Decision.
- If the claim is passed to another Compensator, that Compensator will pick up the claim for consideration.
- If the claim is rejected, the Compensator completes the response and the claim exits the process. Notification is sent back to ALB which displays under the Stats tab. An acknowledgement of the update is required ( ) and the matter is taken out of the PI Portal process. Depending on the circumstances, claims can be resubmitted. Click on Resubmit a Claim for more details.

> **NOTE** Once the claim has been successfully submitted, all fields in the data pages become read only.

If the claim is not accepted, accepted with negligence other than seat belt or out of time, a relevant notification is sent to ALB under the Status tab. You acknowledge the update and the claim exits the process.

If Accepted, costs are payable within 10 days. This is handled outside of the PI Portal process.

For all matters, except Child Claim, if the claim results in Stage 1 costs and the time period has expired (10 days at present):

- You can submit an Exit Claim with reason 'Stage 1 costs not paid on time'
    OR
- You can submit a 'Stage 1 Costs received'

> **NOTE** When the matter is dealing with a **Child Claim** and the compensator has accepted liability, clicking the acknowledgement button (or agenda step within ALB) sets the status in the Key Case Details as 'Start of stage 2.1'. As ALB does not currently support stage 2.1 you, as the claimant representative, will need continue the claim by login in to the portal web site.

If the claim results in Stage 1 costs and the time period has **NOT** expired (10 days at present)

- You cannot submit a an Exit Claim with reason 'Stage 1 costs not paid on time'
    But
- You can submit a 'Stage 1 Costs received'

Setup Matter

Adding the Module to a Matter

1. Having created the Client and Matter in the usual way, display the **Matter Details** screen.

2. Click on the **Actions** menu, select **Modules** then select **Add Personal Injury (Portal) Matter**.

3. The initial module screen displays. For information on the screen click on PI Portal Screen.

> **NOTE** PI Portal is for handling claims by individuals only. If you attempt to attach the module to a matter for an organisation client, you will get a message to say "Personal Injury (Portal) claims can only be made against individuals.

Accessing an Existing PI Portal Matter

Once the Personal Injury (Portal) module has been attached to a matter, there are a number of different ways to access the module from the matter:

Start Point	Method
Client Search	Right-click on the matter and select **View Personal Injury (Portal) Details**.
Matter Search	Right-click on the matter and select **View Personal Injury (Portal) Details**.
Dashboard	From dashboard elements such as My Cases, My Favourites and Recently View Files, right-click on the matter and select View Personal Injury (Portal) Details. From the **My Live Personal Injury Portal Claims** element, click on the matter.
Matter Details	Click on the module icon, , towards the top right corner of the page.

PI Portal Screen

Once the PI Portal module has been attached, the module screen displays with the **Key Case Details** and the usual tabs.

The Key Case Details display, as relevant, the Claim Reference, MOJ Claim Status and Status Last Changed.

The tabs hold:

Tab	Description
Status	Displays activity on the matter. Items listed include: module attached, agenda steps completed, portal submission made - including Exit Claim and Acknowledgements, portal notifications received, documents (Word, forms).
Data	Displays data pulled through from PMS, claimant, claimant representative etc. Also allows for data to be entered concerning the accident and other contacts. See Data Entry for more details.
Agendas	The Personal Injury (Portal) agendas are a predefined list of steps containing the actions that would be taken throughout the course of a standard PI Portal transaction. Agendas are loaded by clicking on the "New Agenda" option and selecting the appropriate agenda for the matter and clicking OK.
Documents	Displays a list of historical documents generated via the PI Portal and Agendas tab. Additionally it will list any documents which are imported into PMS. See the Document Manager Manual for details of options available through the documents tab.
Contacts	This tab lists the parties and contacts on a matter including the claimant and defendant. New Contacts/Parties can be added by clicking on the icons on the data screens, e.g. hospitals, other parties. Contacts/Parties details can be edited/deleted by selecting the appropriate party and right-clicking and selecting from the shortcut menu. There are other options to Produce Documents and Quick Letters from the menu.
Summary	This screen is similar to the Summary screen on the original matter and shows a summary of the matter details.
Notes	See the Clients and Matters for details of Notes.
Diary	See the Diary for details.

Data Entry

Entering Data into the Module

Once the module has been added to the matter, the module displays the Status tab, detailing that the module has been added.

In the module screen, click on the **Data** tab. The screen is split in two:

- The left pane is the Navigation Panel which lists the Portal Pages, in groups with the current group's pages listed towards the top.
- The right pane displays the currently selected page.

The pages have been set out to mirror those on the PI Portal, so if you have previously entered data directly on to the portal, you will be entering it in the same order.

Navigation Panel

To display a page, click on the relevant group in the navigation panel and the group's pages will display at the top of the pane, click on the page to display its contents.

As data is entered, or pulled through from the existing data held in PMS, validation checks are made on the data to ensure that it will not be rejected by the PI Portal. These include:

- Fee Earner has telephone number and email address.
- Branch address fields match requirements, i.e. minimum of house name or number, address line 1, town and country.

Warning signs, ⚠️, display in the pages adjacent to the field where data is either missing or incorrect. Hover over the warning icon to display a message detailing the problem.

The pages on the PI Portal are grouped together which the ALB module mirrors as below. For more information on each page, click the page link.

Group	Pages
Claim and Claimant Details	Claimant's Representative - Contact Details Defendant's Details - included insurance details Claimant's Details
Medical Details	Injury and Medical Details Rehabilitation
Vehicle Damage/Alt. Provision	Vehicle Damage Alternative Vehicle Provision
Accident Details	Accident Details Accident Time, Location and Description Accidents Involving a Bus or a Coach Driver Details Owner Details Insurance Company Details
MIB Claims (displays if Insurer set to MIB)	Defendant's Details Vehicle Details
Other Party Details	Other Party Details (1) up to six parties can be added.
Liability/Funding	Liability Funding
Insurer Response	Not technically Data Entry. Contains the responses from the insurer once the Compensator has responded to claim.

Where relevant, pre-existing data in ALB will be pulled through to the pages in the module. For more information on pre-existing data, click on the link below.

Some of the pages are conditional and only display when previous fields have been selected. E.g. the Driver, Owner and Insurance Company details pages, under the Accident Details group, only display if the field "At the time of the accident the claimant was" is set to "A passenger in a vehicle owned by someone else".

Some of the pages have conditional elements to them and only display these fields when previous options have been taken. For more information on conditional pages, click on the link below.

RELATED MATTERS

- Pre-existing Data
- Conditional Pages

Pre-Existing Data

Where there is pre-existing data in ALB, it is imported automatically into the PI Portal module and displayed in the appropriate fields.

Data that is treated in this way includes the following:

- Claimant's Details
- Claimant's Representative - Contact Details

These pre-populated fields will be 'read-only' and validation rules are applied where appropriate to ensure the data meets the PI Portal's data requirements to ensure the submission is accepted.

Other contact details will have read only fields, such as the Defendant's Details. Whilst these will not be available at the Add Module stage, there will be an Add Defendant or Add *Suitable Contact Type* button on the page to facilitate this. Once added or selected as a contact, the details will be populated and the relevant validation rules run.

Where the data fails the validation rules, warning triangles are displayed adjacent to the field and an explanatory message is displayed when you hover over the triangle with your mouse. E.g.

- For the address details, it will check that there is a house number or name, together with at least a Street 1 address, town county and country.

- For the Fee Earner details, it will check that there is a work email address and telephone.

The Fee Earner forenames are split into the Contact Name and Contact Middle Name fields. This is achieved by the rule that if there is a space in the forenames, anything following the space is put in the Middle Name field. If the Fee Earner's name is double barrelled, enter a hyphen between the names to keep them together.

For example:

ALB Forenames	Contact Name	Contact Middle Name
Anne Marie	Anne	Marie
Anne-Marie	Anne-Marie	

As the above details relating to the Branch and Fee Earner are held in Utilities, if any changes are required you will need to advise your Administrator for them to amend or add the relevant data so it matches the PI Portal's requirements. Once corrected, when you next open the module, the amended details will pull through and the warning icons disappear.

> **NOTE** The corrections will only need to be carried out once and should appear less and less and the system is used and all irregularities are corrected.

Conditional Pages/Fields

To prevent the screen from becoming too complex and long, where appropriate we have included conditional pages and fields which only display when previous choices have been made.

Conditional Pages

There are a number of pages that only display when specific selections are made in other fields.

As an example, the **MIB Claim** group and pages only display when **MIB** is selected as the Insurer Type.

On the same lines, in the **Accident Details** group, the pages, **Drivers**, **Owner** and **Insurance Company Details** do not display unless, in the **Accident Details** page, the field **At the time of the accident the claimant was** is set to **A passenger in a vehicle owned by someone else**.

Conditional Fields

There are a number of fields that only display when specific selections are made in other fields.

As an example, on the **Vehicle Damage** page, there is only one field when you first display it, a check box to indicate if the claimant is claiming damage to their own vehicle. When this is checked, further fields display which are then required to hold further information detailing the damage to the vehicle. Similarly, the bottom, "**If No**" check box, when checked, also displays further fields for details of the alternate company details.

On the same line, on the **Alternative Vehicle Provision** page there is only one initial field, which, if unchecked, displays further fields to hold required information.

> **WARNING** Data that is entered into conditional pages and/or fields will be automatically cleared should subsequent field selections cause the fields to be re-hidden. This is to ensure forms produced do not include data that is not shown on the screen. Users can undo the changes if they click on the **Cancel** button **before** they click **OK** or **Apply**.

Claim and Claimant Details

There are three pages in this section.

Claimant's Representative - Contact Details

This page holds the Claimant's Representative - Contact Details which are a combination of the matter fee earner and the branch information which is pulled through from Utilities / Core PMS, Branch and Fee Earner folders.

All fields are read only and if there are any warning icons, you will need to contact your ALB Administrator to arrange for the data in these tables to be amended to meet the PI Portal's requirements.

> **NOTE** Addresses are validated for the correct layout, e.g. the portal requires a house number or name, together with at least a Street 1 address, town and country.
>
> **NOTE** The telephone number is picked up from the Work Telephone 1 field and the email address from the Work Email field.

Defendant's Details

This page holds the Defendant's Details and is in two parts.

The name and address details are pulled through from Contacts so the fields are read only. Click on the Add Defendant icon to add these details. If you have the ALBconflict check activated, this will check the data as you add the defendant to avoid any possible conflicts or duplicated records.

Enter relevant details into the driver, vehicle and policy reference number fields as required, taking note of the mandatory fields as indicated by the

warning icons and the restrictions on policy reference number fields regarding format of the number.

For the Insurer Information, if Insurer, use the drop down field to select the company. This list is provided by the MoJ and is updated from time to time. If you cannot locate the insurance company, contact your ALB Administrator to see if there is an update available to be uploaded.

If you select MIB from the Insurer Type, the Insurer field becomes inactive and a new section in the navigation pane displays, MIB Claims.

Claimant's Details

This page holds the Claimant's Details most of which are pulled through from the Client information and so are read only. If any part is missing, a warning icon displays and you will need to edit the Client contact information to correct.

If the National Insurance number is not available, you will need to enter a reason why in the field below.

The Claim Value field is not uploaded to the portal but used to categorise the claim into claims up to £10,000 and claims up to £25,000.

> **NOTE** If you amend any details via the Contacts tab, you need to refresh the PI (Portal) module for the change to be viewed on the relevant data page.

Medical Details

There are two pages to this section.

Injury and Medical Details

This page holds information regarding any injuries sustained in the accident, plus any hospitals attended.

Complete the check boxes and fields as required.

The bottom three check boxes are conditional and further fields display when any of them are checked.

If the "Did the claimant attend hospital as a result of the accident" box is checked, an Add Hospital icon displays which enables you to add the hospital details. An additional box displays for overnight stays.

Rehabilitation

This page holds information regarding any rehabilitation that has been required as a result of any injuries sustained in the accident.

Enter any information on whether the claimant required any rehabilitation, giving full details if where appropriate.

Vehicle Damage/Alt.Provision

Two pages to this section.

Vehicle Damage

This page holds information on any damage sustained to the vehicle, whether the claimant was the driver, passenger or other.

Initially just one check box on the page, which, if checked, causes a number of other fields to display.

Complete the check boxes and drop down fields as required. There are a number of conditional fields, which cause further fields to display as required.

Alternative Vehicle Provision

This page holds information on, if any, alternative vehicle provided, or required if not already provided.

Initially just one check box on the page, which, if unchecked, causes a number of other fields to display.

Complete the check boxes and edit fields as required. There are a number of conditional fields, which cause further fields to display as required.

Accident Details

This section has three pages.

Accident Details

This page holds information on whether the claimant was the driver, passenger or other, how many occupants there were in the vehicle and if a seat belt was being worn.

Complete the drop downs and enter data as required.

If the Accident Details page has the claimant set as a "Passenger in a vehicle owned by somebody else", the following pages display:

- Driver Details
- Owner Details
- Insurance Company Details

Accident Time, Location and Description

This page holds information on the date, time and location of the accident. It also has options to indicate the weather and road conditions, basic accident type and a free text field to enter a description of the accident.

Complete the fields as required, noting the mandatory fields.

Accidents Involving a Bus or Coach

This page holds information relating to accidents involving a bus or coach, including driver details, number of passengers and proof of travel.

The page initially has one check box to indicate if the accident involved a bus or coach, with additional fields displaying if checked as Yes.

Other Party Details

There are no initial pages in this section, click on the **Add Other Party** icon to proceed. The system allows up to six other parties. Click on the icon for each new party required.

Other Party Details (1)

Having clicked on the **Add Other Party** icon a page displays with read only fields for **Contact** and **Address** details.

Use the drop down to select the party type. If you select **Other** an additional field displays below for you to enter the type of other party.

Click on the **Add Details** icon to enter the details as a contact. You can create a new ALB contact or search for an existing contact, if

appropriate. Conflict checks will be made if your system is set up for such.

There are fields to enter their vehicle details, if relevant.

If the other party has Insurance company details, use the Add Insurance Company icon to add as an ALB service. You can create a new service or search for an existing one. There is a field to enter the insurance policy number.

Multiple Other Parties

Where there is more than one other party, click on the **Add Other Party** tool again and the system will create Other Party Details (2) with a new set of fields ready for completion.

You are allowed up to six other parties.

Liability/Funding

There are two pages to this section.

Liability

The page holds information on why the claimant believes the defendant is liable and also if one or more of the other parties specified hold some liability.

There is a free text field to enter the details of the claimant's statement. A read only field that, if the "Claimant believes that another party could bear some responsibility" box on any of the other parties pages is checked, is completed automatically with that other party.

There is another free text field for any other relevant information and the Statement of Truth section.

Funding

This page holds information details on the funding of the case, dates of arrangements, insurance companies, policy number etc.

There are a series of check boxes relating to the funding arrangements the claimant has entered into. There are also a number of conditional fields which display to hold the Insurance company and policy details and, if relevant, fields to hold details of any membership organisation which has agreed to meet their costs.

MIB Claims

This section in the navigation panel displays when the Insurer Type is set to MIB in the Defendant's Details page. There are two pages to the section.

Defendant's Details

This page holds information detailing the defendant's sex, approximate age together with a free text field for a description of the defendant.

There is also a field to hold information on how the defendant's details were obtained.

Vehicle Details

This page holds information on the make, model and colour of the vehicle.

Three fields for the user to enter the make, model and colour of the vehicle.

Produce Claim Notification Form

Once all the details of the claim have been entered into the data pages, you can produce a Claim Notification Form for the client to read and confirm that all the details are correct.

1. From the **Actions** menu, select **Laserforms**, then either **Produce CNF (RTA1)** or **Produce Defendant Only CNF (RTA2)** as required.

2. The Laserform integration runs, merging the entered data and displays the selected Claim Notification Form.

When you close the window, a dialog box displays for you to save the form which will display an entry under both the Status and Documents tabs.

Interacting with the Portal

Claim Status

Once the module has been attached to a matter, there are a number of ways to monitor progress on the status of the claim.

In the module itself, the **Key Case Details** section lists the **Claim Reference**, **MOJ Claim Status** and the **Status Last Changed** date.

There is an icon in the Key Case Details which indicates the claim status and whether the claim is waiting for the :

Icon	Description
🔓	Action is possible in the claim.
🔒	No action is possible, the claim is with the compensator and waiting for a response.
🔒	The claim has gone out of the scope of the current ALB/PI Portal integration.
🛑	The Stop icon displays when the PI Portal requires an acknowledgement. Clicking the icon acknowledges activity. A new line is added under the Status tab.

There is also a new dashboard element available, named "My Live Personal Injury Portal Claims". This lists each live matter where you are the Fee Earner or Partner (drop down to select relevant option). There are also Date From and Date To lookups to set a date range to filter by the matter Opened Date. The dashboard columns display:

- Who the claim is with (claimant representative or compensator)
- Matter Reference
- Client
- Description
- Opened Date
- Person Dealing
- Branch
- Claim Status
- Claim Status Last Changed

There are other columns that can be displayed by right-clicking and selecting **Show Column Chooser**. These are **Owned By** and **Portal Claim Reference**.

Each of the columns can be sorted ascending or descending and dragged into a different order. Matters can also be grouped by dragging the column heading to the grey bar that appears when you drag the column heading above the others.

The layout can be returned to the default settings at any time by right clicking with the mouse and selecting **Reset Layout**.

From the **Dashboard** element, a double click on a **matter** will display the **Personal Injury (Portal) details** or a right click will display a shortcut menu where you can select to display the **Matter Details** or the **Personal Injury (Portal) details**.

Email notification

By default, any interaction with the PI Portal will be recorded under the Status tab. However, ALB can also be set up to notify the matter fee earner by email, advising them of any change in a case's status. The fee earner will need to have a valid email address set in their **Contact Info** tab in their **Staff** record under **Licensing and Users**.

Below is an example of the email contents. The subject line will always read "**ALB personal injury portal notification**" and the contents will mirror the information seen under the Status tab.

> Matter reference R000010021, Portal reference 0000000000045531
>   24/05/2012 Stage 2.1 Interim Payment needed for claim 000000000045531: 3 days left
>   24/05/2012 Stage 2.1 Interim Payment needed for claim 000000000045531: 3 days left

Where a fee earner has a number of matters that have been updated, they will only receive one email with all relevant updates listed.

The email will be from the user specified as the **Personal Injury Portal Poller User** under **System Parameters**.

RELATED ISSUES

- System Parameters
- User Setup

Submitting a Claim

Once all the required data has been entered on to the pages of the Data tab, the claim can be submitted.

1. Check the navigation panel for any data validation warnings and correct/complete the data as required.

2. Click on the **Claim** menu and select **Submit Claim**.

   You can also submit the claim using the **Agendas** tab and attaching the **Personal Injury Portal Claim** agenda, then selecting **Stage 1: 1.1 Submit Claim**.

3. If all the data is correct, after a short pause, the system will respond by completing the **Claim Reference** and **MOJ Claim Status** fields in the **Key Case Details** section in the top-right corner of the screen.

> **NOTE** The system will not allow a user to submit a claim from either the Actions menu or from the Agenda unless they have been configured with the appropriate permissions to do so. See User Permissions.

Once the claim has been submitted, the data pages become read-only and further amendments are no longer allowed.

Submission Failure

Should there are any problems with the data, a suitable warning message will display indicating what the problem is in order that you can correct the issue and re-submit the claim.

Claim Submission Following Portal Access Timeout

When a claim is submitted, there is a possibility that you will receive an error message:

A timeout has occurred while accessing the portal: please check that the portal is available.

This could be because of an issue with your network or the portal itself.

At this point, ALB does not know whether the claim has been successfully uploaded or not.

To prevent a duplicate claim, where a timeout has occurred, when the claim is resubmitted, ALB searches the portal for any claims with the same client/matter reference as generated by PMS.

If the search fails to find a matching claim, ALB will submit the claim in the normal way.

If the search finds one or more matching claims, a dialog box displays advising:

This claim has been previously submitted to the portal but a timeout occurred before a portal response was received. In this situation the claim may have been received by the portal even though ALB has not received a portal claim reference. As a result the system has searched the portal for any claim that match the claim reference 'Client-Matter Ref'. Matching claim(s) are shown below. If one of these corresponds to this claim please select it and press 'OK'. If 'Cancel' is selected then the system will assume that the claim was not successfully received by the portal and will proceed to submit this claim again.

A list of matching claims displays under this message detailing the Application ID (Claim Ref), Application Status MoJ Status) and the Creation Time (Date).

The existing claim is listed

Where the claim listed matches the aborted claim submission, the user should highlight the claim and click **OK**. ALB will then display the portal claim reference in the Key Case Details area.

> Note The MoJ status will initially display as "Claim Submitted". It will be updated, if the compensator has made any updates affecting the claim status, when ALB runs the scheduled claim data update.

The existing claim is not listed

Where no claim is displayed, or those displayed are not the same claim, the user should click **Cancel**. In this situation, the claim is then submitted as standard.

Accept/Reject Claim

Once a claim has been submitted, it will be picked up by the Compensator who will decide whether to accept the claim and complete their first response, pass the claim on to another branch or user or reject it for a given reason. The Compensator can also attach and upload relevant files to the claim.

ALB's scheduler monitors the status of submitted claims and picks up and downloads any change in status, the response and any attachments automatically once the compensators have posted them on the portal.

When the Compensator has accepted a claim, a notification is sent back to ALB which is added under the Status tab confirming the acceptance of the claim.

The Compensator also has the option of re-assigning or re-allocating the claim, rejecting it or stating it as fraud.

Whatever the response, the status will update in the Key Case Details section in the top-right corner of the screen and, if ALB has been set up for it, fee earners will be notified by a message or email.

Any attachments will display under the Status tab with the following information:

- **Activity Time** – Date and time the attachment was downloaded.
- **Activity Description** – Type of activity, plus if attachment, full path to file.
- **Activity Log Category** – Type of document etc.
- **User** – In most cases this will be the system user as items are added by the scheduler.

The attachment can also be found under the Documents tab. It can be opened from either tab.

If the claim has been rejected, it can be re submitted with amended data to back up the claim or with another insurer selected, see Resubmit a Claim.

Resubmit a Claim

When a claim has been rejected by the compensator, depending on the reason, the claim can be resubmitted via the Agenda tab or Claim menu.

Rejection of the claim sets the status to "**RejectedToCR**" and the **Action** menu displays a new item **Allow resubmission**.

1. Clicking on **Allow resubmission** clears all the claim data except the "CNF" data and removes the read-only attribute so you can amend and add data as required.

2. The claim then appears to be an unsubmitted claim with just the CNF data populated. However, under the Status tab, the history has an entry recording the fact that the claim was reset for re-submission.

3. The data can be amended to strengthen the case or if you need to submit the matter to a new compensator, make the required changes on the data pages and then go to the **Agendas** tab and select **Stage 1: 1.1 Resubmit Claim** or go to the **Claim** menu and select **Resubmit Claim**.

The claim is re-submitted under a new reference, which will be displayed in the MoJ Status fields.

Insurer First Response

Once the Compensator has accepted the claim, they then can decide if Article 75 applies or whether it should come under the MIB insurance type. If either of these options is applied, the timescale changes from 15 days to 30 days for the liability decision to be made.

The Compensator then completes the Insurer First Response pages and the PI Portal then notifies and sends the information to ALB.

The Personal Injury (Portal) module creates a new group, called "Insurer First Response" and displays the response in these pages.

NOTE If the Insurer answers Other as the Capacity, as above, the clarification text completed by the Insurer on the PI Portal is displayed on right hand side of the second line labelled Other.

The portal also sends the CNF in pdf format with the First Response section of the RTA1 form completed.

Upload Documents

Files can be uploaded to the PI Portal from the Documents tab to a total size of 20Mb.

Each claim is allowed to have a maximum of 5 documents each of which can be a maximum of 4Mb in size.

To upload a document:

1. Right click on the file and select **Upload to Portal**.

2. After a short pause, a message displays **Upload Succeeded**.

WARNING You can only upload one file at a time. Whilst ALB will allow the selection of multiple files, necessary for other functions, if you have more than one file selected when you choose Upload to Portal, only the first file selected will be uploaded.

WARNING It is not possible for ALB to keep track of the size of the files uploaded. If you attempt to upload a file that breaches the 20Mb limit, you will get an error message.

NOTE If a file has already been uploaded, the menu item will not be available.

Stage 1 Complete

Stage 1 is completed by receiving a response from the other party. Once of the three following responses are expected

- Liability admitted [Liability admitted with negligence]
- Liability not admitted
- Liability admitted with negligence (other than seatbelt)

In order to proceed, the operator should select **Continue** from the **Actions** menu to acknowledge the response and move the claim on to Stage 2.

Stage 2

Currently ALB does not integrate with the PI Portal beyond Stage 1 and you will need to access the PI Portal direct to continue the process.

Having moved to Stage 2 by selecting **Continue** from the **Actions** menu, ALB will still receive email and Status updates as and when the portal produces such. This will include any documentation uploaded to or produced by the portal, including the Court Proceedings Pack if appropriate.

Administration

Licencing

Prerequisites

This module is introduced in ALB version 1.19.0. You must have upgraded to at least this version before following the remainder of these instructions.

This module uses Laserforms to produce the Claim Notification forms, RTA1 and RTA2.

Please follow the instructions carefully before trying to use the Module.

Adding your Licence

1. Log on to ALB PMS.

2. Click on **Utilities** and select **Licensing and Users**.

3. Expand the **System Licensing** folder, then the **Applications** folder.

4. Right-click on the **Personal Injury (Portal)** folder and select **Add Licenses**.

5. Enter your licence code (obtained from Advanced Legal on purchase) and click on **Finish**.

Assigning Users

1. Log in to ALB PMS.

2. Click on **Utilities** and select **Licensing and Users**.

3. Expand **System Licensing** folder, then the **Applications** folder.

4. Right-click on the **Personal Injury (Portal)** folder and select **Add User**.

5. Check each user who is to have access to the module

6. Press **Apply** and **OK** when you have added all required users.

System Parameters

In order to access the PI Portal, there are a number of new System Parameters that hold relevant information such as the URL address, site user name and password.

From **Utilities / System Parameters** scroll down to the Personal Injury Portal parameters.

Parameter	Values/Description
Personal Injury Portal Poller User	This is the e-mail address that the user will receive e-mail notifications from, if used. This can be a partner for example.
Personal Injury Portal WebService MessageLength	Notification message limit
Personal Injury Portal WebService Password	Site-wide password to open the "tunnel" to the PI Portal.
Personal Injury Portal Webservice Timeout	Timeout period if no activity.
Personal Injury Portal Webservice URL	Address to the secure PI Portal.
Personal Injury Portal Webservice Username	Site-wide username to open the "tunnel" to the PI Portal.

In order receive information sent from the PI Portal, the **Email Host Server** parameter needs to have the ip address of your email server.

User Setup

Once a user has been given a licence, their user setup needs to have a portal user name assigned and be given permissions for the activities they will be allowed to carry out.

Portal Credentials

Each user needs to have a Personal Injury (Portal) User Name assigned.

1. From the **Utilities / Licensing & Users**, expand the **System Users** and **User** folders. Select the **Staff** folder and then right-click on the relevant staff user and select **Edit**.

2. Click on the Logon Info tab and enter the **Personal Injury (Portal) User Name** in the field which is to the bottom left of the Logon Info section of the page.

3. Click **Apply** and then **OK**.

> **NOTE** A password is not required at user level as this is held at site level together with a user name which is used to open the 'tunnel' to the PI Portal.

Configuring users' access to portal submission activities and notification options

As a System Administrator you are able to control which users have access to specified portal submission activities and control how portal notifications are received.

1. From the **Utilities / Licensing & Users**, expand the **System Users** and **User** folders. Select the **Staff** folder and then right-click on the relevant staff user and select **Edit**.

2. Click on the **Features** tab in the "User Details" screen.

3. Locate and expand, if necessary, the Personal Injury (Portal) folder to enable or disable the following activity and notification options:

- Allow (any stage) Acknowledgements e.g. timeout, Payment received.
- Allow (any stage) Exit Process
- Allow Stage 1: 1.1 Submit Claim
- Allow Stage 2-1: 2.12 Offer for partial amount accepted
- Allow Stage 2-1: 2.17 Payment received/not received
- Allow Stage 2-1: 2.7 (Ask for interim payment) Amount requested
- Allow Stage 2-2: 2.18 Submit settlement pack
- Allow Stage 2-2: 2.29 Counter offer
- Allow Stage 2-2: 2.33 Confirm offer
- Allow Stage 2-2: 2.37 Stage 3 Settlement pack
- Receive Notifications by Email
- Receive Notifications by Pop-up message within ALB

4. Click **Apply** and then **OK**.

> **NOTE** When a new user account is created all the Personal Injury (Portal) options are disabled by default.

Insurer's List

There is a verified Insurer list for data entry. This list is provided by the Ministry of Justice in Excel format. This list will be updated from time to time and, as an administrator, you will be emailed when the list has been updated and ready for download from the member area of the portal.

To upload the list to ALB, follow the procedure below.

1. Go to **Utilities \ Modules**.

2. Expand the **Personal Injury (Portal)** folder to display **Insurers**.

3. Right click on the **Insurers** folder or anywhere in the right hand pane and select **Load Insurer File**.

4. Locate and select the spreadsheet file, named similar to "A2A_RAPID_Insurer_Index_table_PRODUCTION_v61.xls" and click **OK**.

5. When the file has been loaded the details are added to or updated in the right hand pane.

The Insurer List, or updated version, will now be available for user to select from.

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+44 (0) 844 815 5620

www.advancedcomputersoftware.com/legal
linkedIn.com/company/advanced-legal
@adv-legal

Booths Park 4 | Chelford Road | Knutsford | Cheshire | WA16 8GS

Advanced Legal Solutions Limited, trading as Advanced Legal, part of the Advanced Computer Software Group.
Registered in England. No: 01738381. Registered office: Ditton Park, Riding Court Road, Datchet, Berkshire, SL3 9LL.