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(54) CLAIM AND PROGRESSION MANAGEMENT

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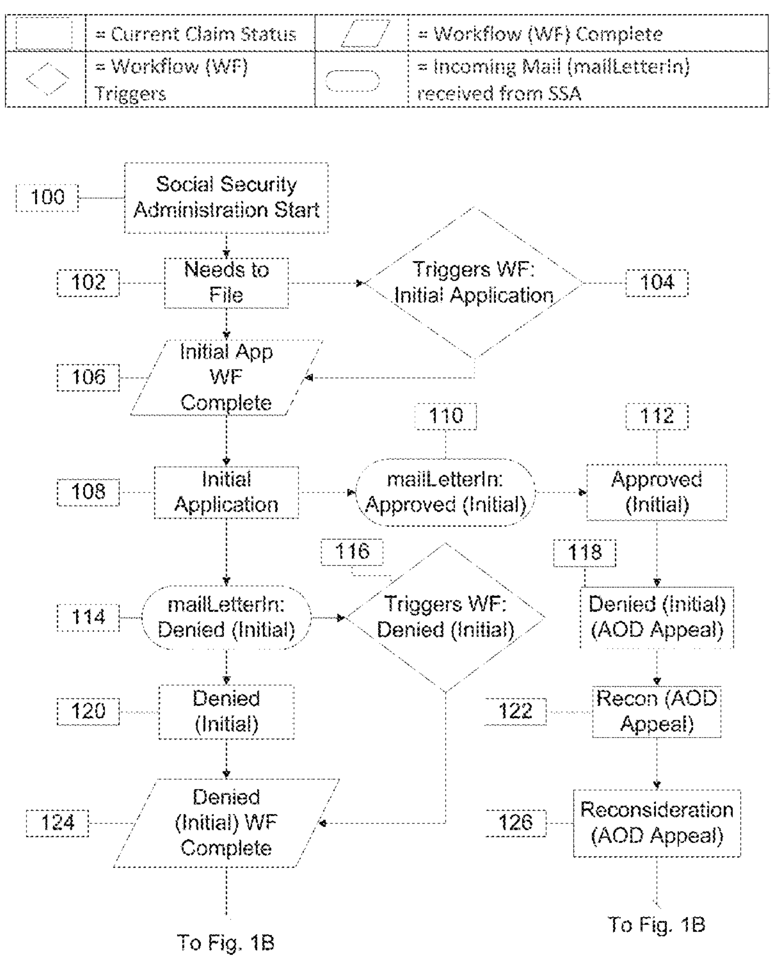
G06Q 40/00	(2006.01)
G06Q 10/00	(2006.01)
G07F 19/00	(2006.01)

(52) **U.S. Cl.**
CPC ***G06Q 50/26*** (2013.01); ***G06Q 40/08*** (2013.01); ***G07F 19/00*** (2013.01); ***G06Q 40/00*** (2013.01); ***G06Q 10/00*** (2013.01); ***G07B 17/00*** (2013.01)

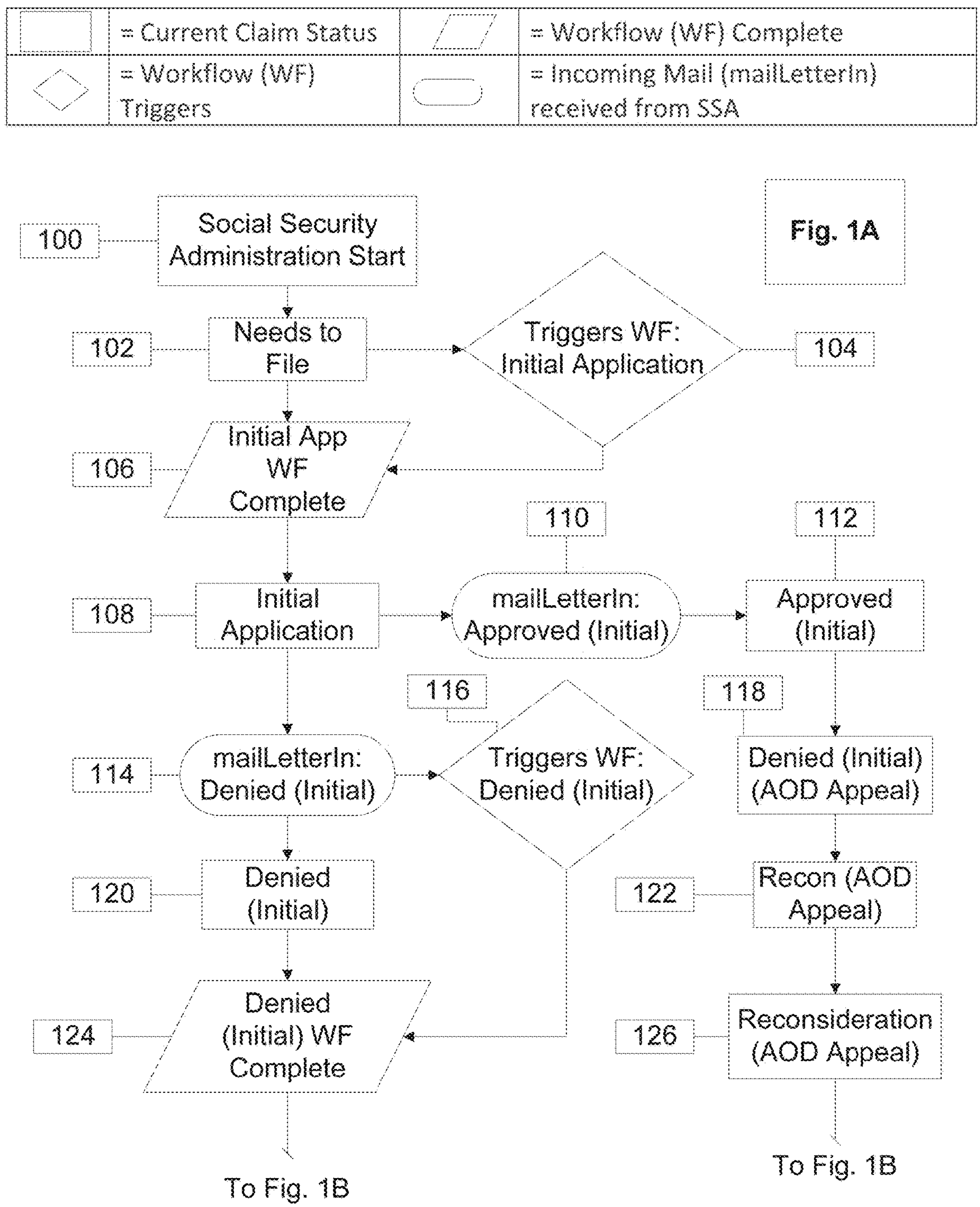
(57) **ABSTRACT**

The present invention is a computer implemented method and system for gathering information from a user related to, filing for, and obtaining government benefits, such as Social Security benefits. The present invention also enables the user to track the benefit application approval process and reminders when certain data or responses are due. There is a feature which enables the user to modify the data submitted for the benefits when circumstances warrant. There is also a decision appeal process feature.

Claim Progression Flow Chart



Claim Progression Flow Chart



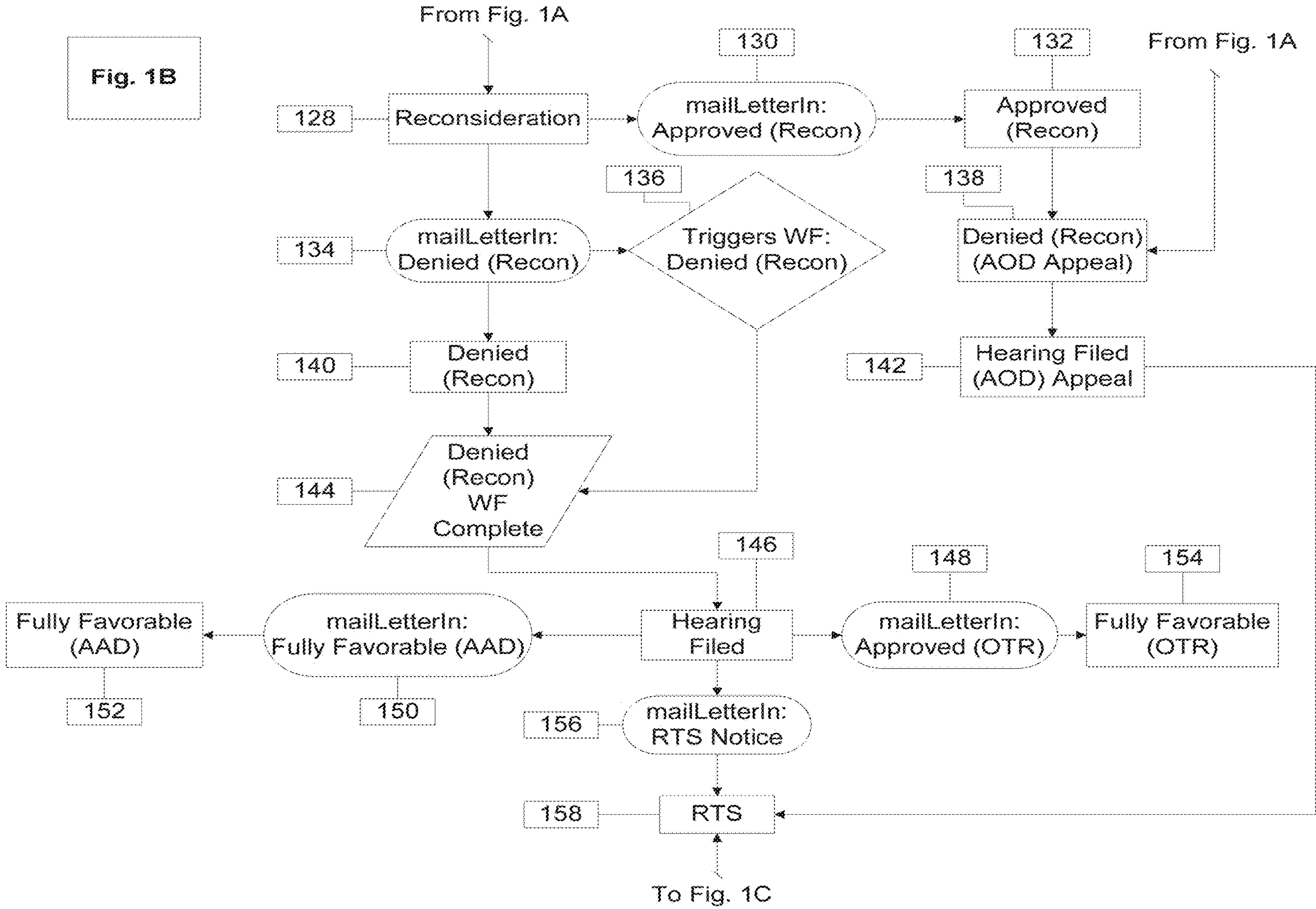

From Fig. 1A
From Fig. 1A
128
Reconsideration
130
mailLetterIn: Approved (Recon)
132
Approved (Recon)
134
mailLetterIn: Denied (Recon)
136
Triggers WF: Denied (Recon)
138
Denied (Recon) (AOD Appeal)
140
Denied (Recon)
142
Hearing Filed (AOD) Appeal
144
Denied (Recon) WF Complete
146
Hearing Filed
148
mailLetterIn: Approved (OTR)
154
Fully Favorable (OTR)
150
mailLetterIn: Fully Favorable (AAD)
152
Fully Favorable (AAD)
156
mailLetterIn: RTS Notice
158
RTS
To Fig. 1C

Fig. 1B

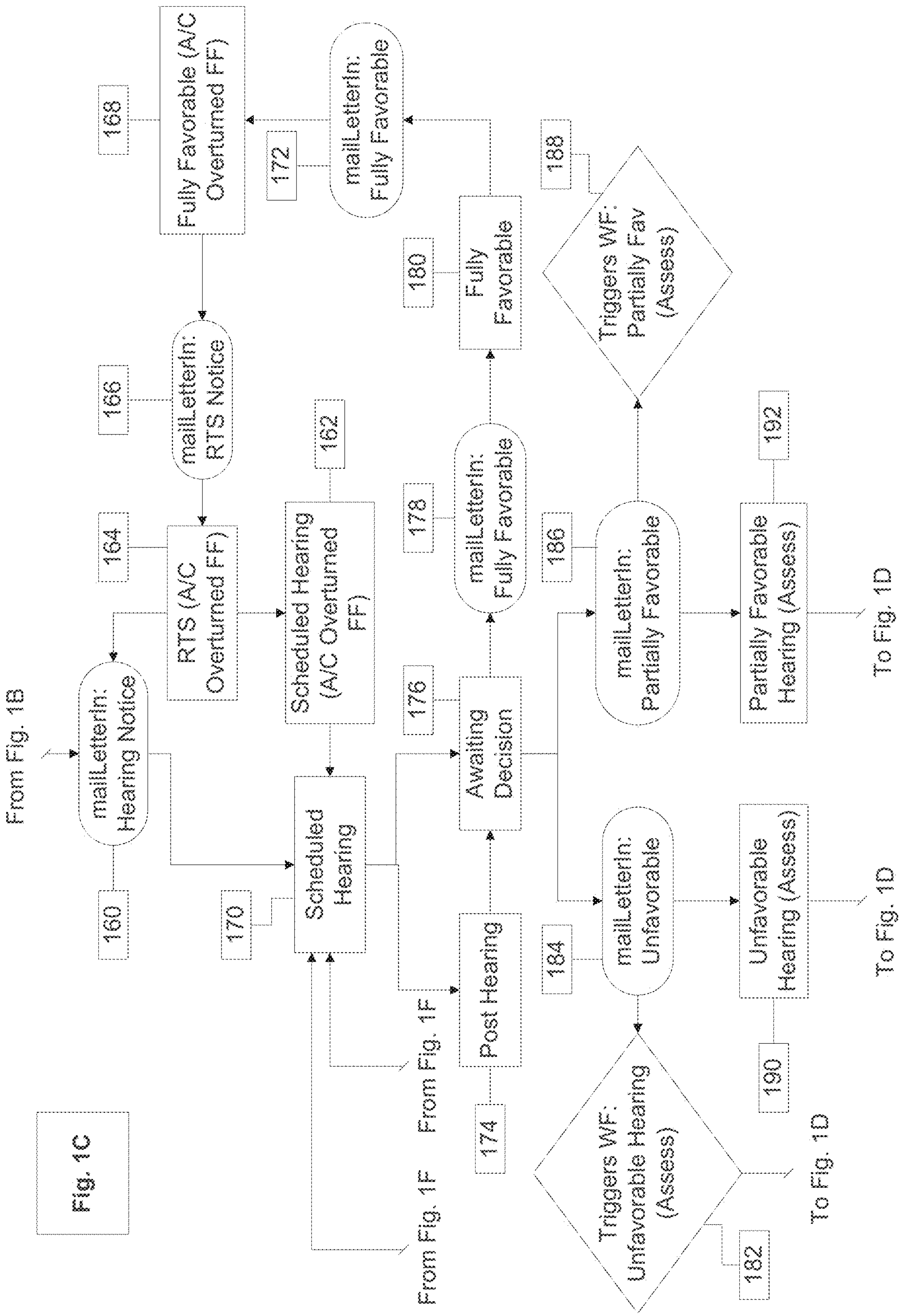

From Fig. 1B
mailLetterIn: Hearing Notice
160
RTS (A/C Overturned FF)
164
mailLetterIn: RTS Notice
166
Fully Favorable (A/C Overturned FF)
168
Scheduled Hearing (A/C Overturned FF)
162
Scheduled Hearing
170
mailLetterIn: Fully Favorable
172
From Fig. 1F
From Fig. 1F
Post Hearing
174
Awaiting Decision
176
mailLetterIn: Fully Favorable
178
Fully Favorable
180
Triggers WF: Unfavorable Hearing (Assess)
182
mailLetterIn: Unfavorable
184
mailLetterIn: Partially Favorable
186
Triggers WF: Partially Fav (Assess)
188
Unfavorable Hearing (Assess)
190
Partially Favorable Hearing (Assess)
192
To Fig. 1D
To Fig. 1D
To Fig. 1D

Fig. 1C

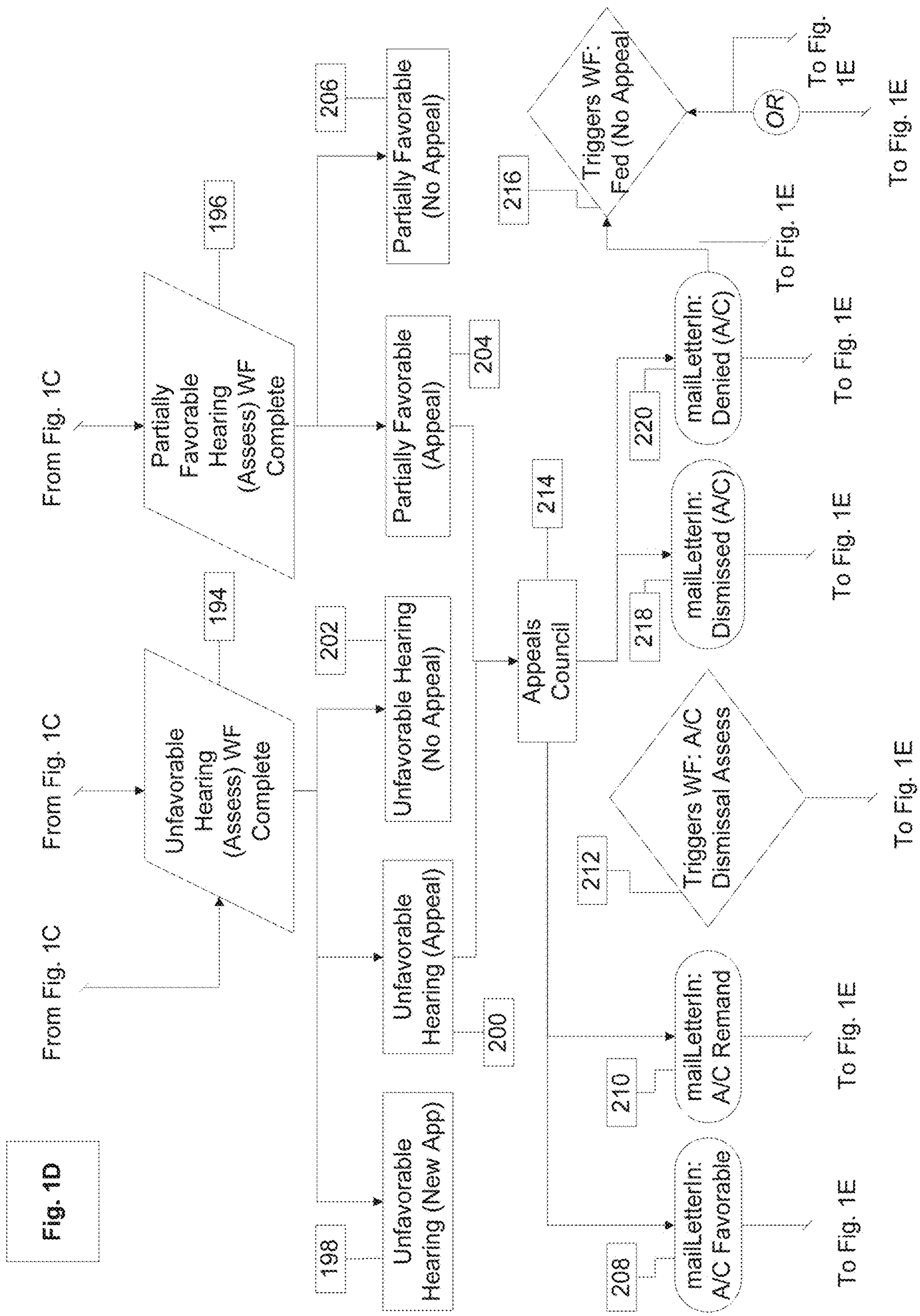


Fig. 1D
From Fig. 1C
From Fig. 1C
From Fig. 1C
Unfavorable Hearing (Assess) WF Complete
194
Partially Favorable Hearing (Assess) WF Complete
196
Unfavorable Hearing (New App)
198
Unfavorable Hearing (Appeal)
200
Unfavorable Hearing (No Appeal)
202
Partially Favorable (Appeal)
204
Partially Favorable (No Appeal)
206
Appeals Council
214
mailLetterIn: A/C Favorable
208
mailLetterIn: A/C Remand
210
Triggers WF: A/C Dismissal Assess
212
mailLetterIn: Dismissed (A/C)
218
mailLetterIn: Denied (A/C)
220
Triggers WF: Fed (No Appeal
216
OR
To Fig. 1E
To Fig. 1E
To Fig. 1E
To Fig. 1E
To Fig. 1E
To Fig. 1E
To Fig. 1E
To Fig. 1E
To Fig. 1E

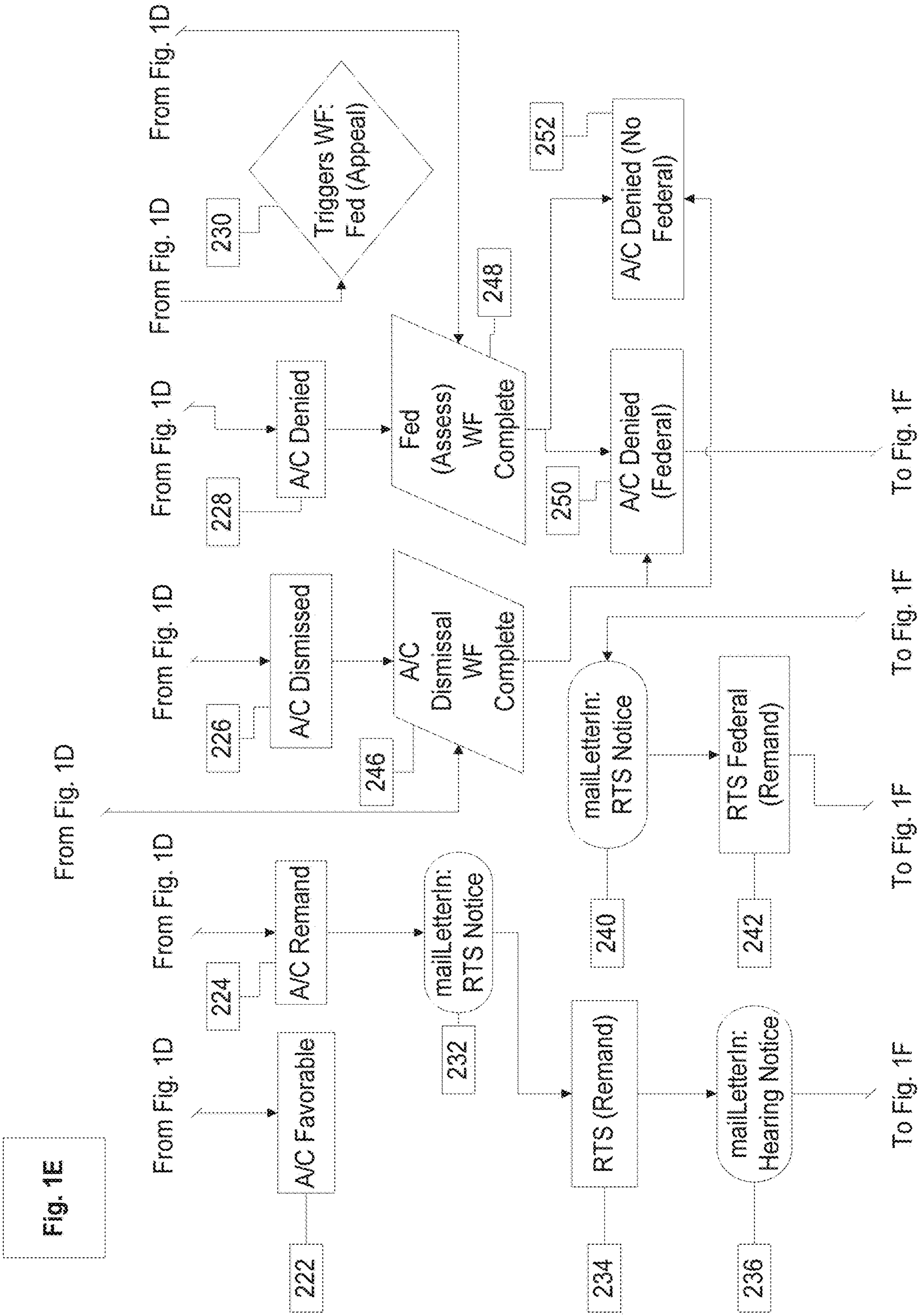


Fig. 1E
From Fig. 1D
A/C Favorable
222
From Fig. 1D
A/C Remand
224
mailLetterIn: RTS Notice
232
RTS (Remand)
234
mailLetterIn: Hearing Notice
236
To Fig. 1F
From Fig. 1D
From Fig. 1D
A/C Dismissed
226
A/C Dismissal WF Complete
246
mailLetterIn: RTS Notice
240
RTS Federal (Remand)
242
To Fig. 1F
To Fig. 1F
From Fig. 1D
A/C Denied
228
Fed (Assess) WF Complete
248
A/C Denied (Federal)
250
To Fig. 1F
From Fig. 1D
Triggers WF: Fed (Appeal)
230
From Fig. 1D
A/C Denied (No Federal)
252

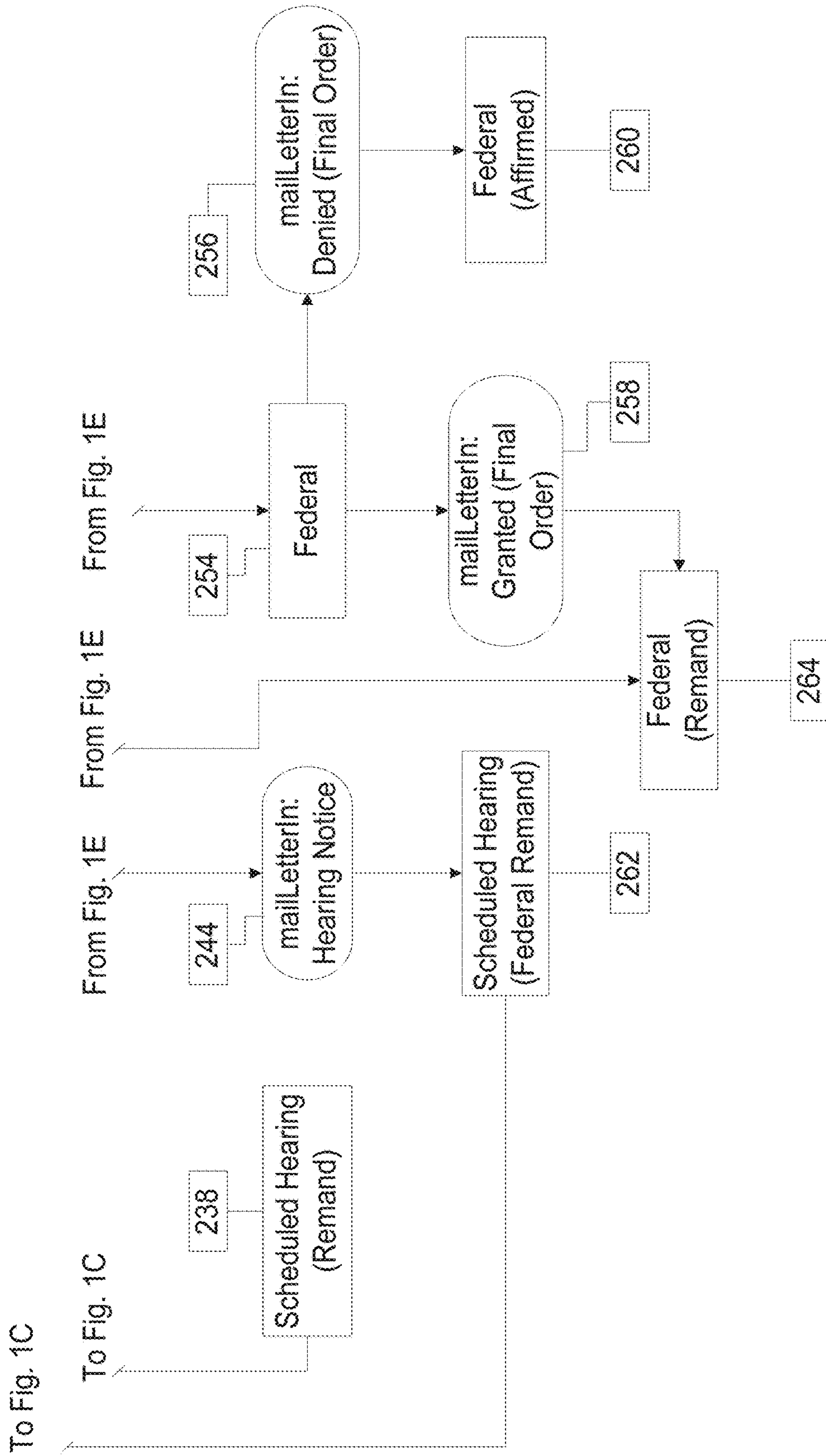

From Fig. 1E
From Fig. 1E
From Fig. 1E
To Fig. 1C
To Fig. 1C
mailLetterIn: Denied (Final Order)
256
Federal (Affirmed)
260
Federal
254
mailLetterIn: Granted (Final Order)
258
Federal (Remand)
264
mailLetterIn: Hearing Notice
244
Scheduled Hearing (Federal Remand)
262
Scheduled Hearing (Remand)
238

Fig. 1F

Fig. 2

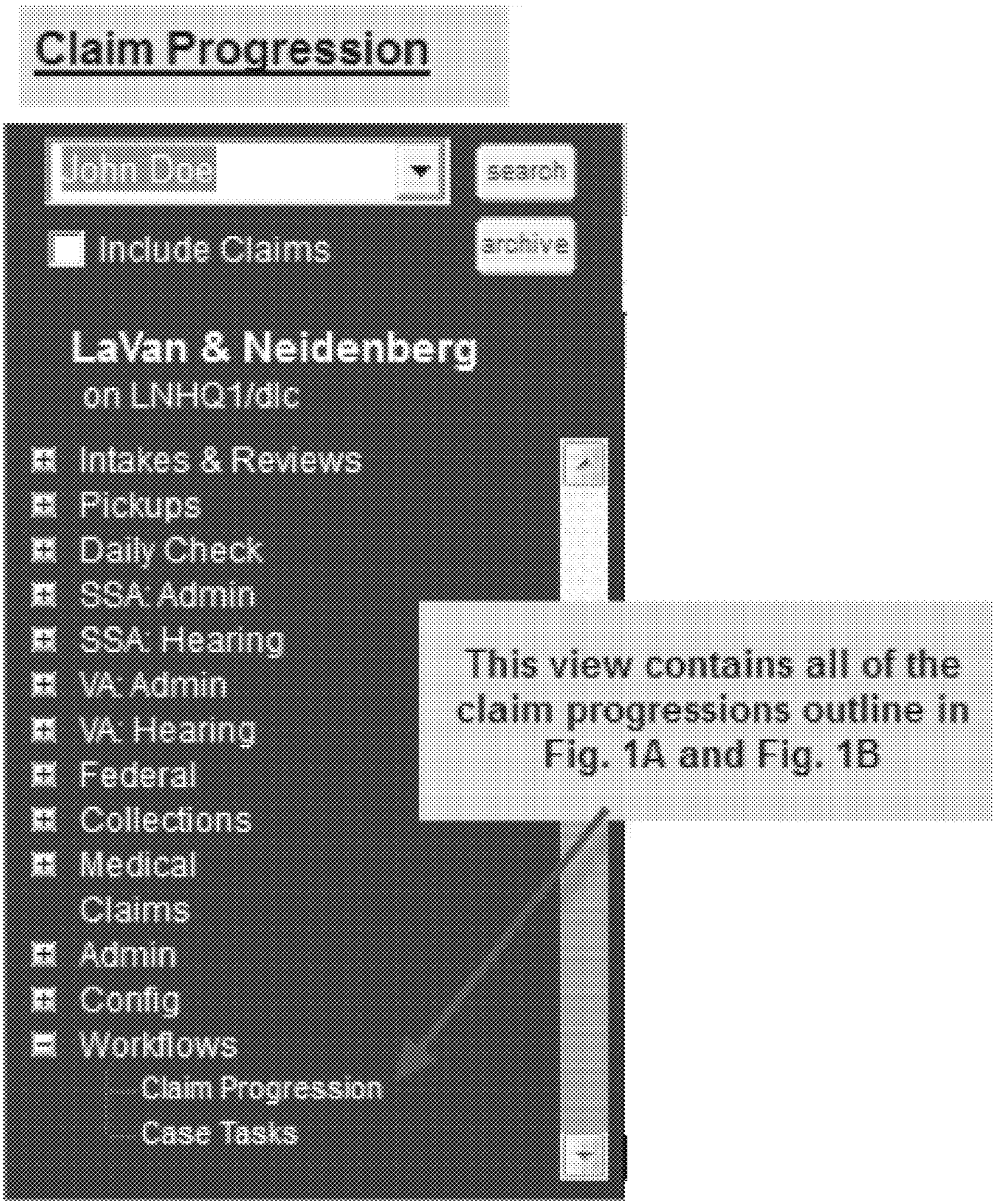

Claim Progression
John Doe
search
Include Claims
archive
LaVan & Neidenberg
on LNHQ1/dlc
Intakes & Reviews
Pickups
Daily Check
SSA: Admin
SSA: Hearing
VA: Admin
VA: Hearing
Federal
Collections
Medical
Claims
Admin
Config
Workflows
Claim Progression
Case Tasks
This view contains all of the claim progressions outline in Fig. 1A and Fig. 1B

Fig. 3

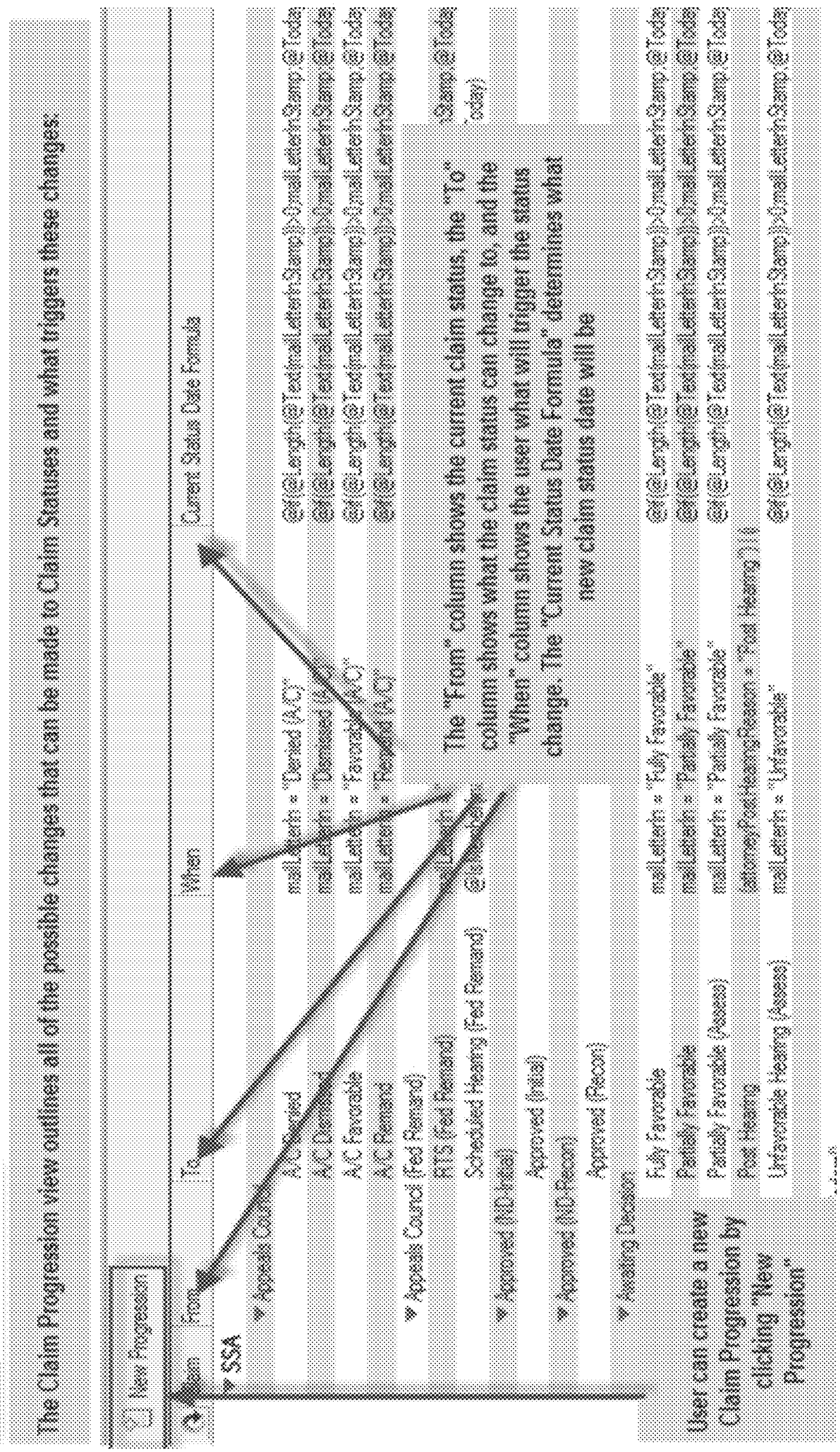

The Claim Progression view outlines all of the possible changes that can be made to Claim Statuses and what triggers these changes:
New Progression
From
To
When
Current Status Date Formula
SSA
Appeals Council
A/C Denied
A/C Dismissed
A/C Favorable
A/C Remand
Appeals Council (Fed Remand)
RTS (Fed Remand)
Scheduled Hearing (Fed Remand)
Approved (NO-Initial)
Approved (Initial)
Approved (NO-Recon)
Approved (Recon)
Awaiting Decision
Fully Favorable
Partially Favorable
Partially Favorable (Assess)
Post Hearing
Unfavorable Hearing (Assess)
mailLetterIn = "Denied (A/C)"
mailLetterIn = "Fully Favorable"
mailLetterIn = "Partially Favorable"
mailLetterIn = "Partially Favorable"
attorneyPostHearingReason = "Post Hearing"
mailLetterIn = "Unfavorable"
The "From" column shows the current claim status, the "To" column shows what the claim status can change to, and the "When" column shows the user what will trigger the status change. The "Current Status Date Formula" determines what new claim status date will be
User can create a new Claim Progression by clicking "New Progression"

Fig. 4

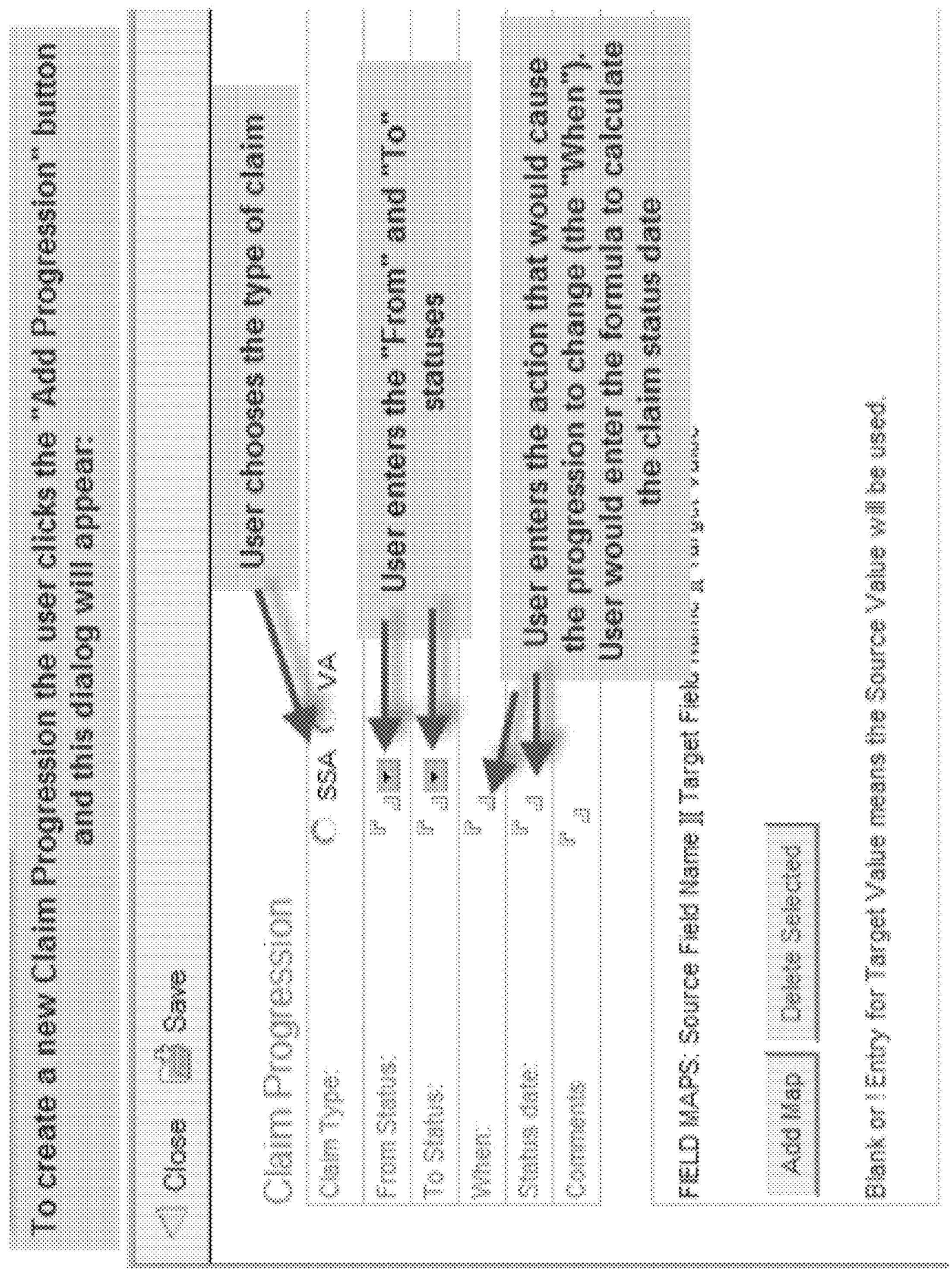

To create a new Claim Progression the user clicks the "Add Progression" button and this dialog will appear:
Close
Save
Claim Progression
Claim Type:
SSA
VA
From Status:
To Status:
When:
Status date:
Comments:
User chooses the type of claim
User enters the "From" and "To" statuses
User enters the action that would cause the progression to change (the "When"). User would enter the formula to calculate the claim status date
Add Map
Delete Selected
Blank or ! Entry for Target Value means the Source Value will be used.

Fig. 5

Workflows: Workflows have been integrated throughout all divisions of the company. The workflows process account for 50% of all work that is completed within the firm. Workflows are tasks that are broken down into specific steps. Each workflow can start automatically by the system of by a user, get assigned to a user, can require a document to be imported to complete specific workflows, and can generate template letters when assigned to the workflow. All workflows are configurable within the office and do not need programmer assistance.

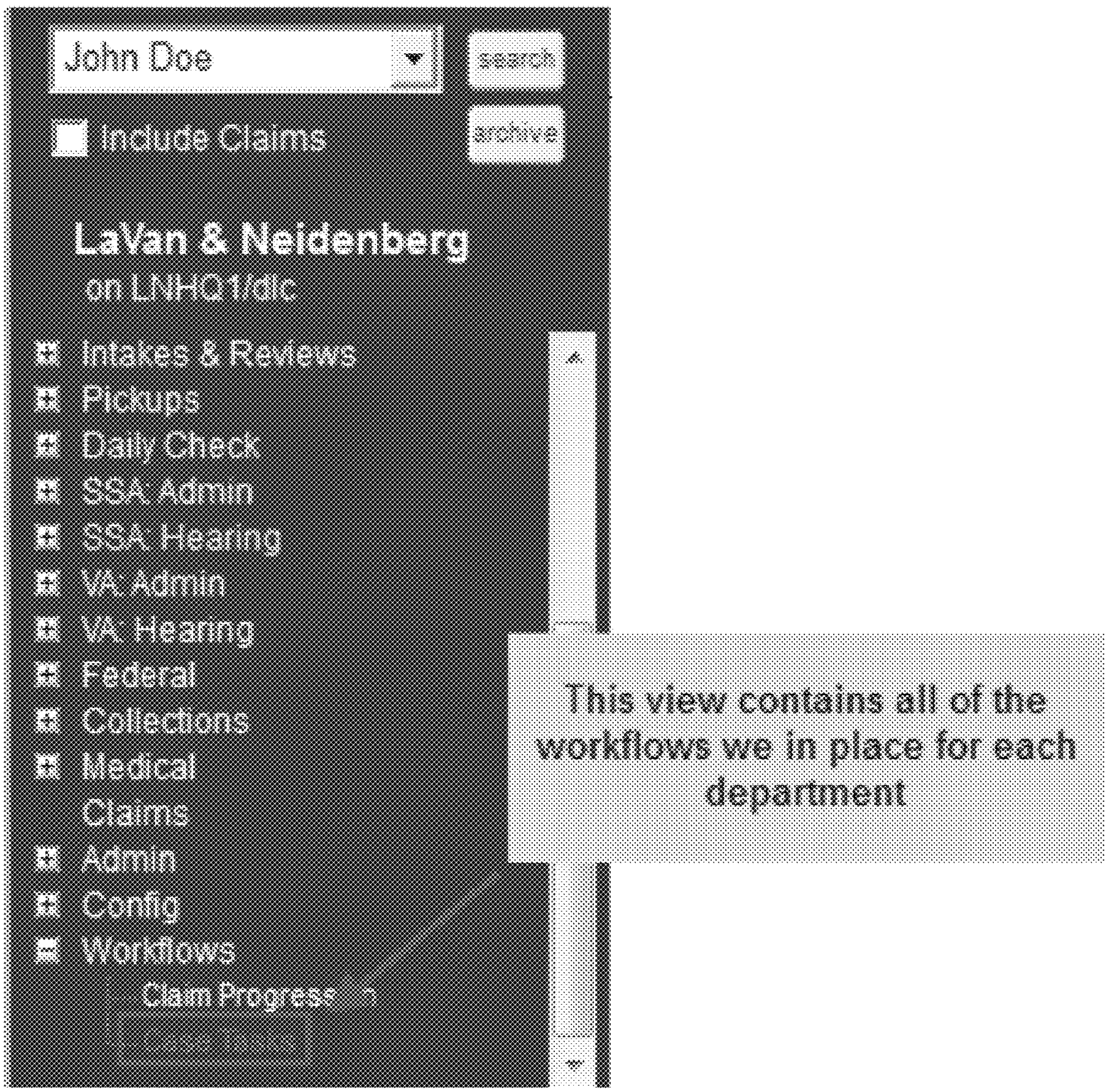


Fig. 6

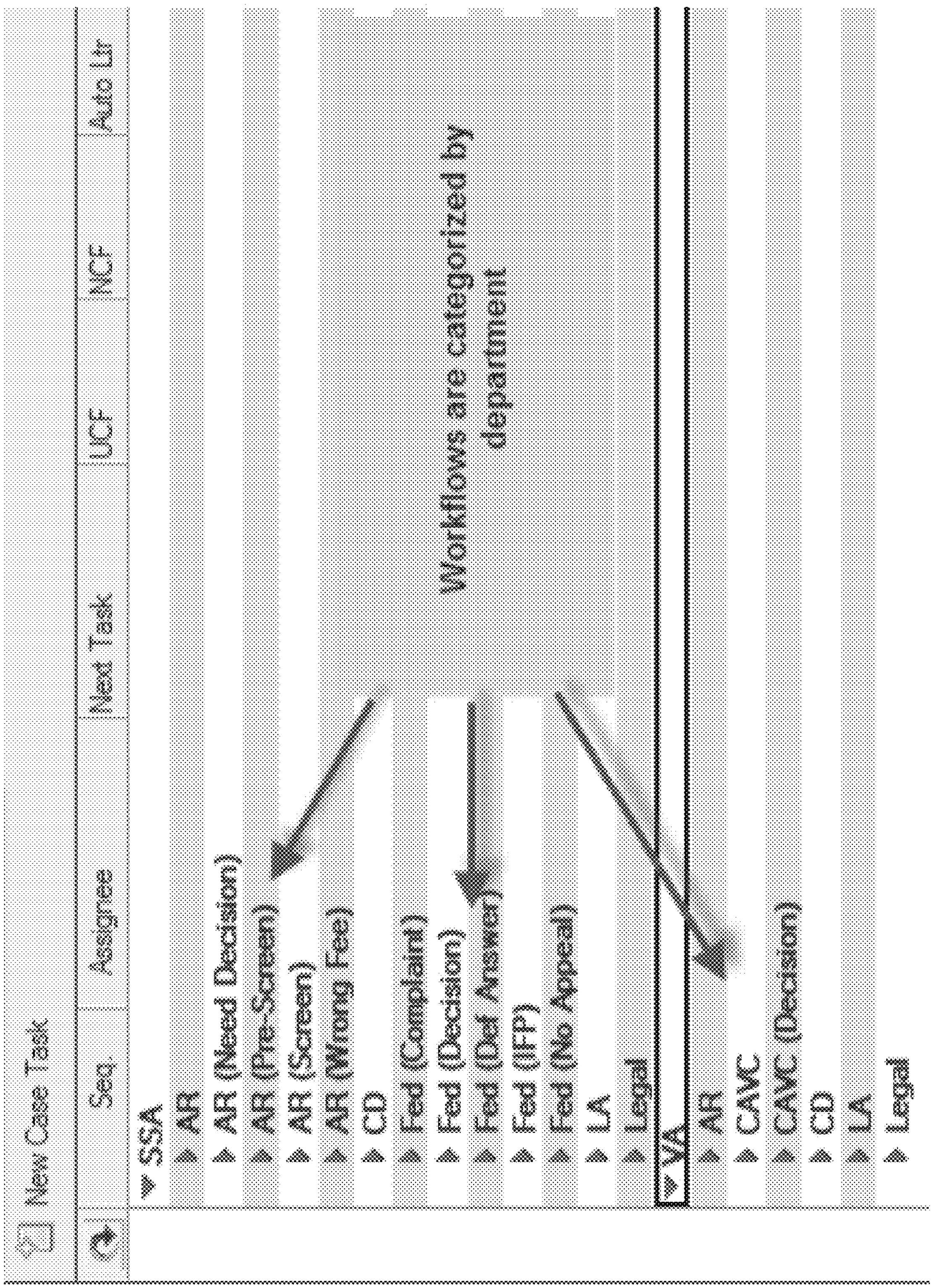

New Case Task
Seq.
Assignee
Next Task
UCF
NCF
Auto Ltr
SSA
AR
AR (Need Decision)
AR (Pre-Screen)
AR (Screen)
AR (Wrong Fee)
CD
Fed (Complaint)
Fed (Decision)
Fed (Def Answer)
Fed (IFP)
Fed (No Appeal)
LA
Legal
VA
AR
CAVC
CAVC (Decision)
CD
LA
Legal
Workflows are categorized by department

Fig. 7

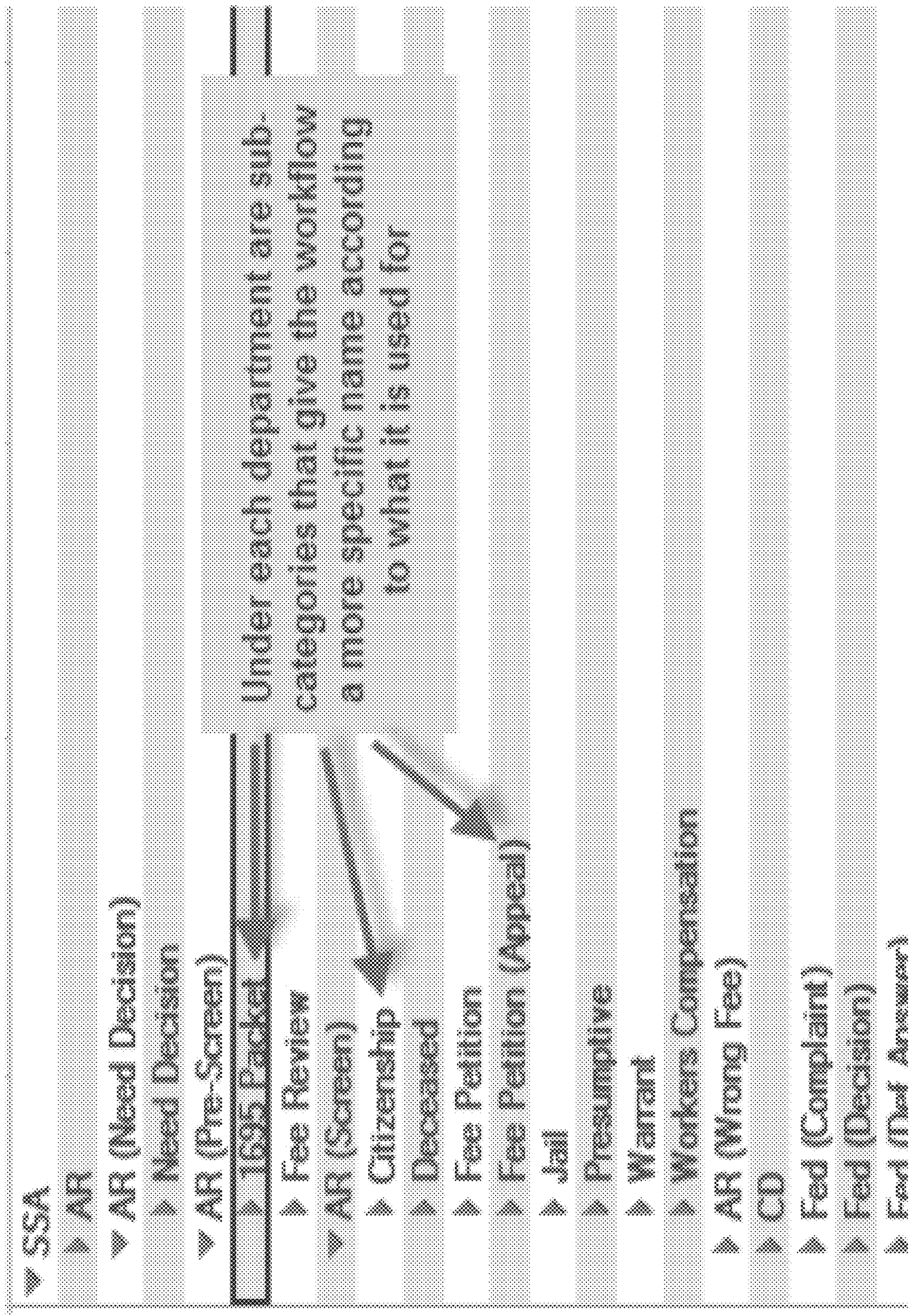

SSA
AR
AR (Need Decision)
Need Decision
AR (Pre-Screen)
1695 Packet
Fee Review
AR (Screen)
Citizenship
Deceased
Fee Petition
Fee Petition (Appeal)
Jail
Presumptive
Warrant
Workers Compensation
AR (Wrong Fee)
CD
Fed (Complaint)
Fed (Decision)
Under each department are sub-categories that give the workflow a more specific name according to what it is used for

Fig. 8

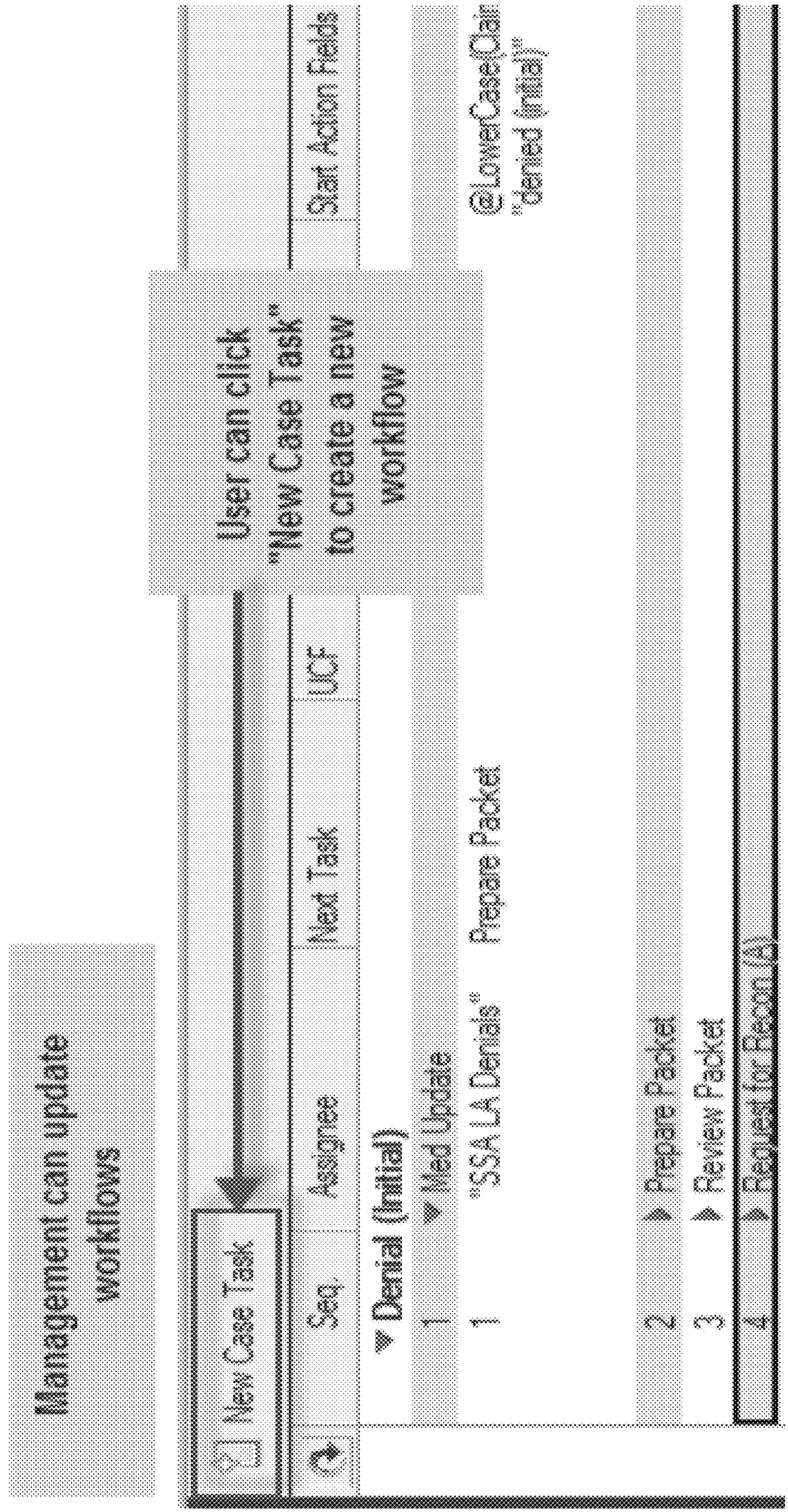

Management can update workflows
New Case Task
User can click "New Case Task" to create a new workflow
Seq
Assignee
Next Task
UCF
Start Action Fields
Denial (Initial)
1 Med Update
1 "SSA LA Denials" Prepare Packet
"denied (initial)"
2 Prepare Packet
3 Review Packet
4 Request for Recon (A)

Fig. 9


After clicking "New Case Task" the following dialog appears
Close
Save
Case Task Definition
Task Type:
Task
Attachment
Claim Type:
SSA
VA
Task Division:
Task File Status:
Task Description:
Task Description Alias:
Task Sequence:
Assigned To:
(individual or group)
Timed Task Name:
Last Workflow Task:
Yes
No
Next Task(s):
Start Date Delay:
0
Days to Complete:
Review:
Yes
No
Requires Key
Yes
No
Comments:
Start Action Formula Context:
Claim
Contact
Spawner Task
Start Action Formula:
Complete Action Formula:
Complete Action Message:
Invalidation Condition:
Auto-generate letter:
Advance to End of Flow:
Yes
No

Fig 10

The following print screens will breakdown the dialog explaining it in 4 sections

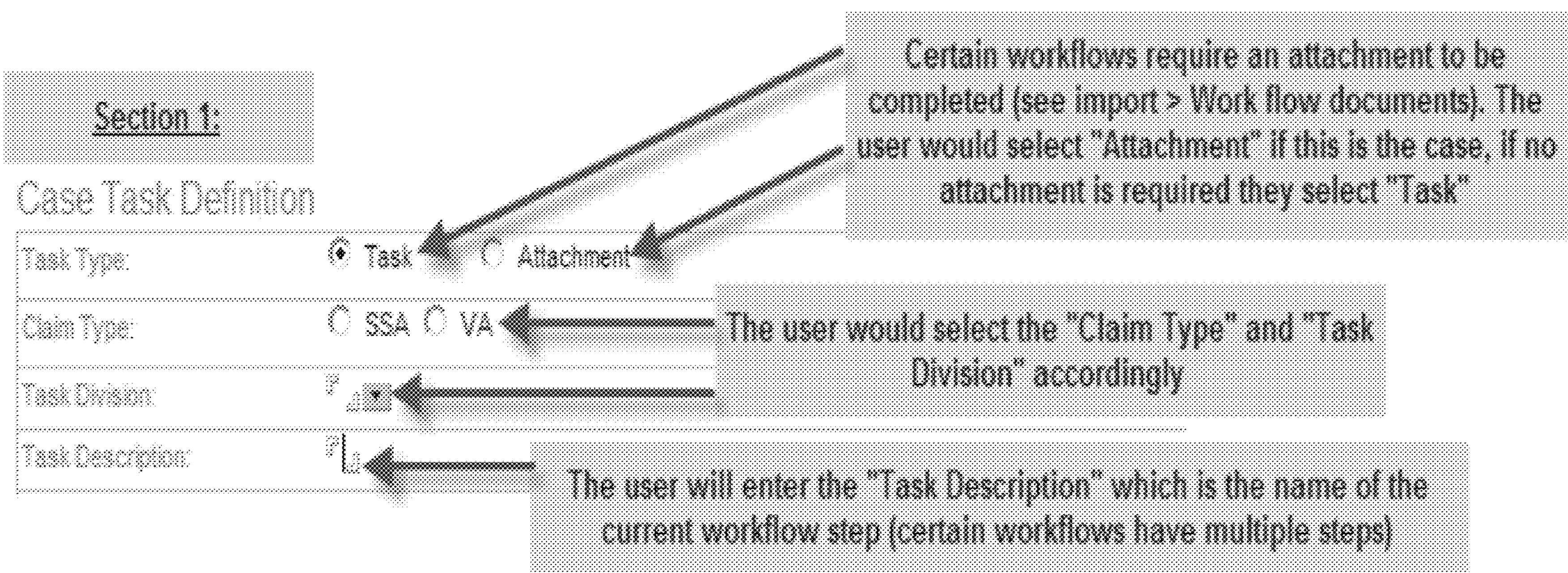
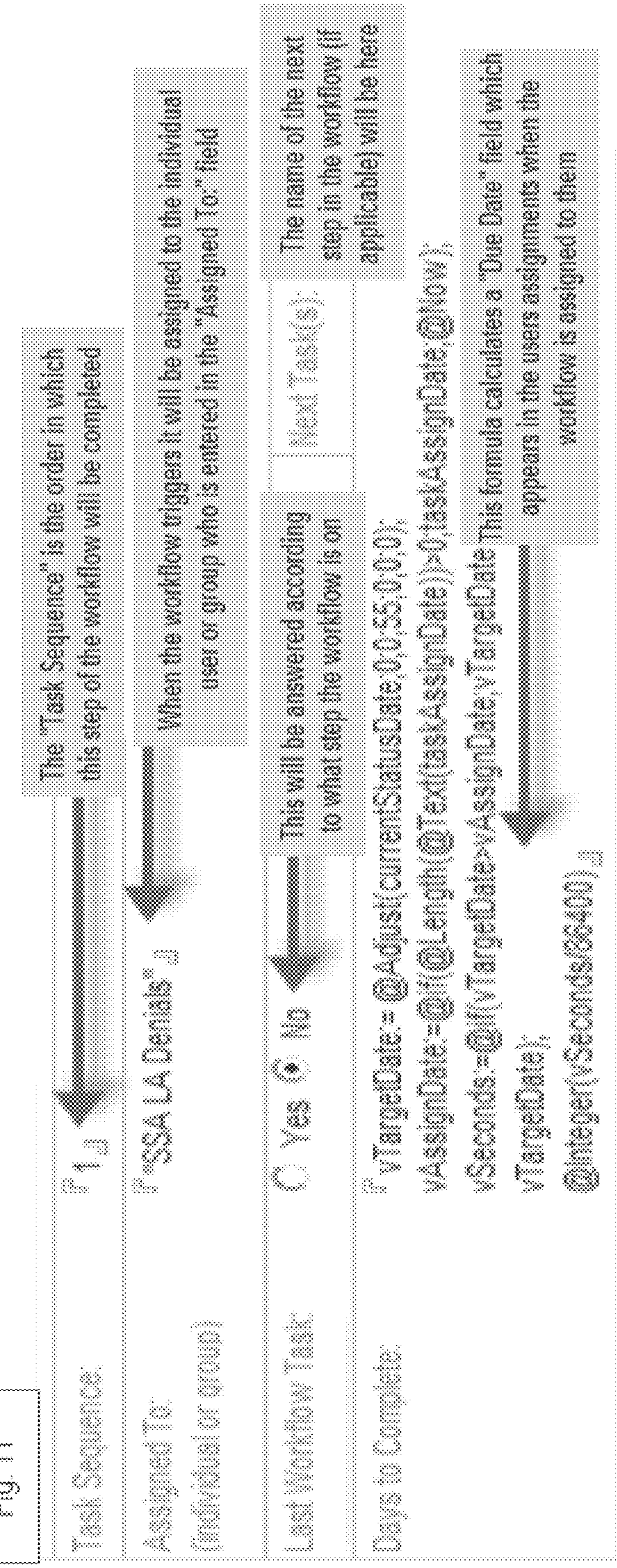


Fig 11


Task Sequence:
1
The "Task Sequence" is the order in which this step of the workflow will be completed
Assigned To: (individual or group)
"SSA LA Denials"
When the workflow triggers it will be assigned to the individual users or group who is entered in the "Assigned To:" field
Last Workflow Task:
Yes No
This will be answered according to what step the workflow is on
Next Task(s):
The name of the next step in the workflow (if applicable) will be here
Days to Complete:
vTargetDate := @Adjust(currentStatusDate;0;0;5;0;0;0);
vAssignDate:=@If(@Length(@Text(taskAssignDate))>0;taskAssignDate;@Now);
vSeconds:=@If(vTargetDate>vAssignDate;vTargetDate-vAssignDate;vTargetDate-
vTargetDate);
@Integer(vSeconds/86400)
This formula calculates a "Due Date" field which appears in the users assignments when the workflow is assigned to them

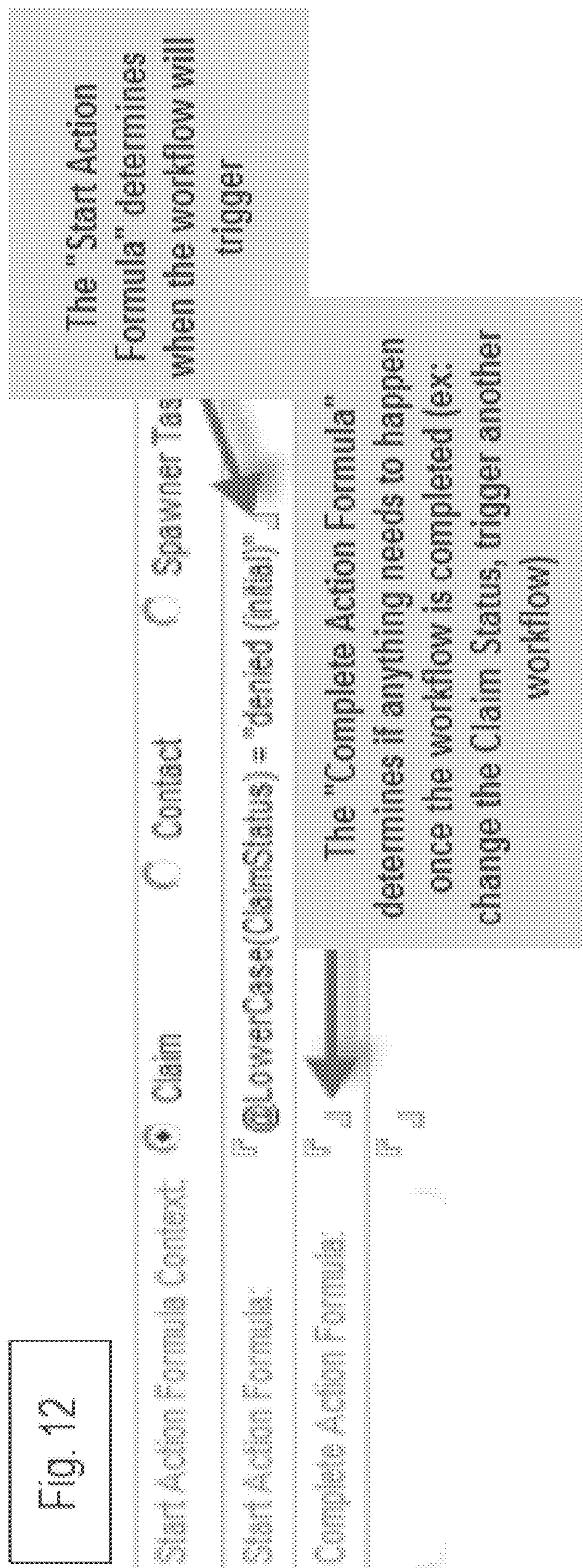

Start Action Formula Context:
Claim
Contact
Spawner Tas
Start Action Formula:
@LowerCase(ClaimStatus) = "denied (ntia)"
Complete Action Formula:
The "Start Action Formula" determines when the workflow will trigger
The "Complete Action Formula" determines if anything needs to happen once the workflow is completed (ex: change the Claim Status, trigger another workflow)

Fig. 12

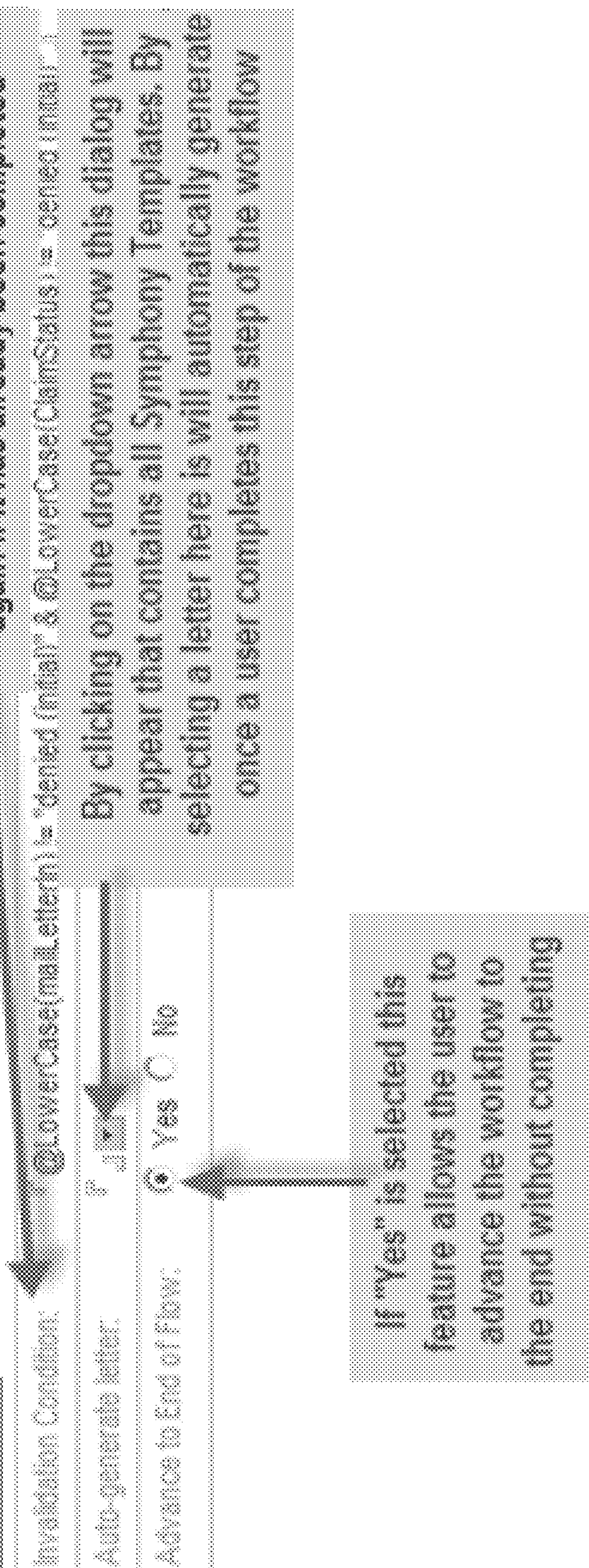

The "Invalidation Condition" will either allow or stop the same workflow from triggering again if it has already been completed
By clicking on the dropdown arrow this dialog will appear that contains all Symphony Templates. By selecting a letter here is will automatically generate once a user completes this step of the workflow
If "Yes" is selected this feature allows the user to advance the workflow to the end without completing
Invalidation Condition:
Auto-generate letter:
Advance to End of Flow:
Yes
No

Fig. 13

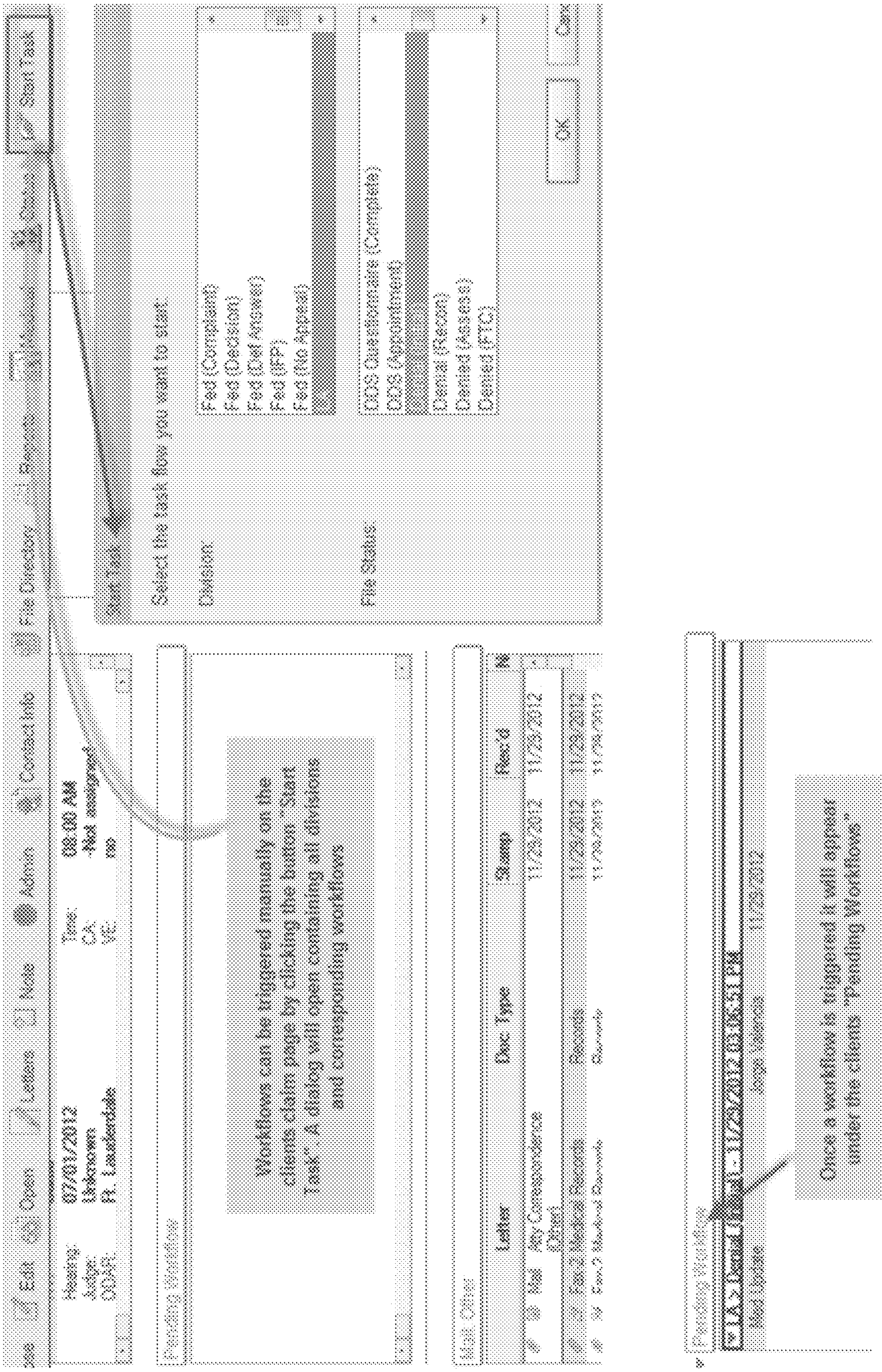
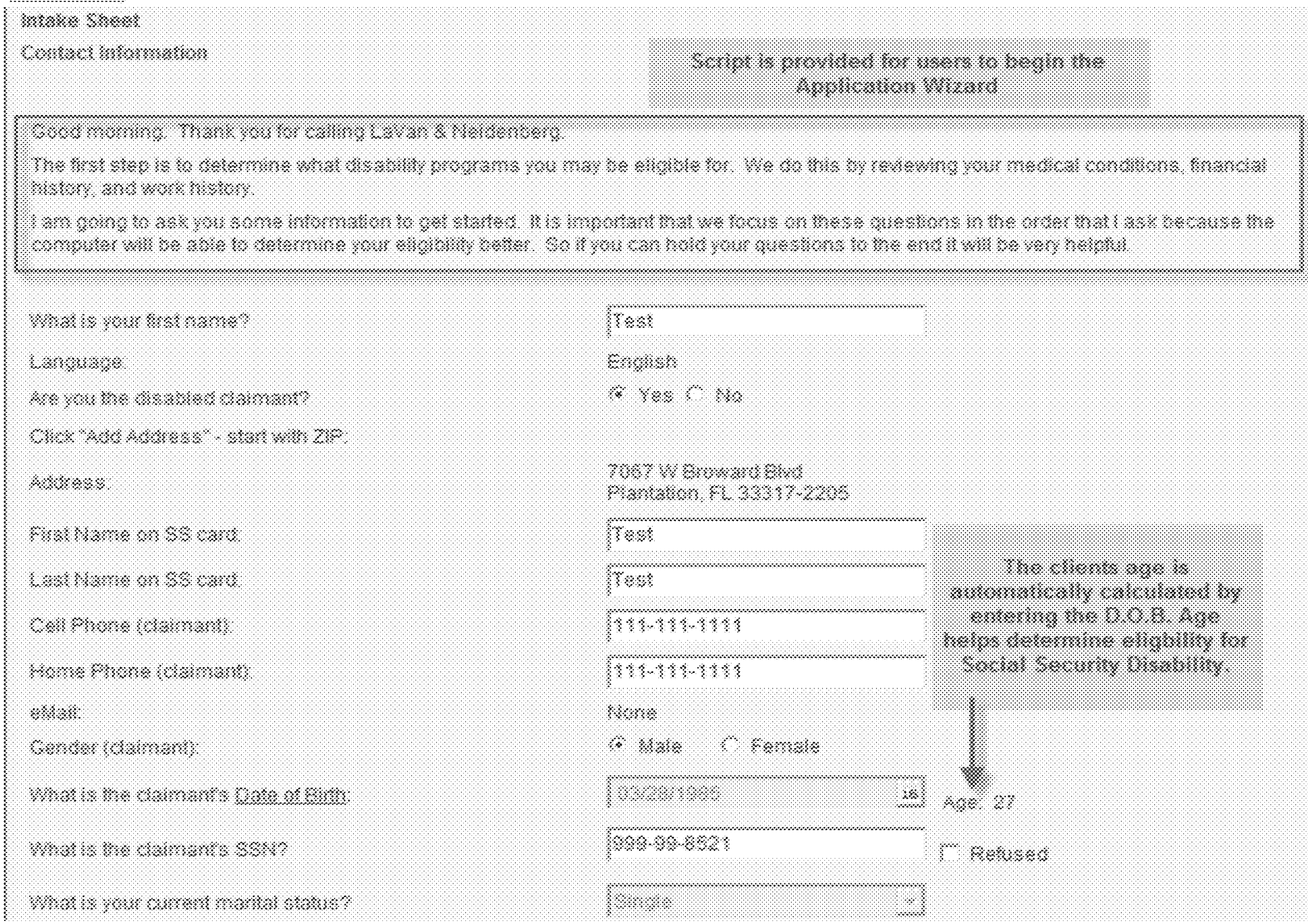

Edit
Open
Letters
Note
Admin
Contact Info
File Directory
Start Task
Hearing: 07/01/2012
Time: 08:00 AM
ODAR: Ft. Lauderdale
Pending Workflow
Mail Other
Letter
Doc Type
Stamp
Rec'd
Atty Correspondence
Records
Workflows can be triggered manually on the clients claim page by clicking the button "Start Task". A dialog will open containing all divisions and corresponding workflows
Select the task flow you want to start:
Division:
Fed (Complaint)
Fed (Decision)
Fed (Def Answer)
Fed (IFP)
Fed (No Appeal)
File Status:
DDS Questionnaire (Complete)
DDS (Appointment)
Denied (Recon)
Denied (Assess)
Denied (FTC)
OK
Once a workflow is triggered it will appear under the clients "Pending Workflows"

Fig. 14

Fig. 15


Intake Sheet
Contact Information
Script is provided for users to begin the Application Wizard
Good morning. Thank you for calling LaVan & Neidenberg.
The first step is to determine what disability programs you may be eligible for. We do this by reviewing your medical conditions, financial history, and work history.
I am going to ask you some information to get started. It is important that we focus on these questions in the order that I ask because the computer will be able to determine your eligibility better. So if you can hold your questions to the end it will be very helpful.
What is your first name?
Test
Language:
English
Are you the disabled claimant?
Yes No
Click "Add Address" - start with ZIP:
Address:
7067 W Broward Blvd
Plantation, FL 33317-2205
First Name on SS card:
Test
Last Name on SS card:
Test
Cell Phone (claimant):
111-111-1111
Home Phone (claimant):
111-111-1111
eMail:
None
Gender (claimant):
Male Female
What is the claimant's Date of Birth:
Age: 27
The clients age is automatically calculated by entering the D.O.B. Age helps determine eligibility for Social Security Disability.
What is the claimant's SSN?
999-99-8521
Refused
What is your current marital status?
Single

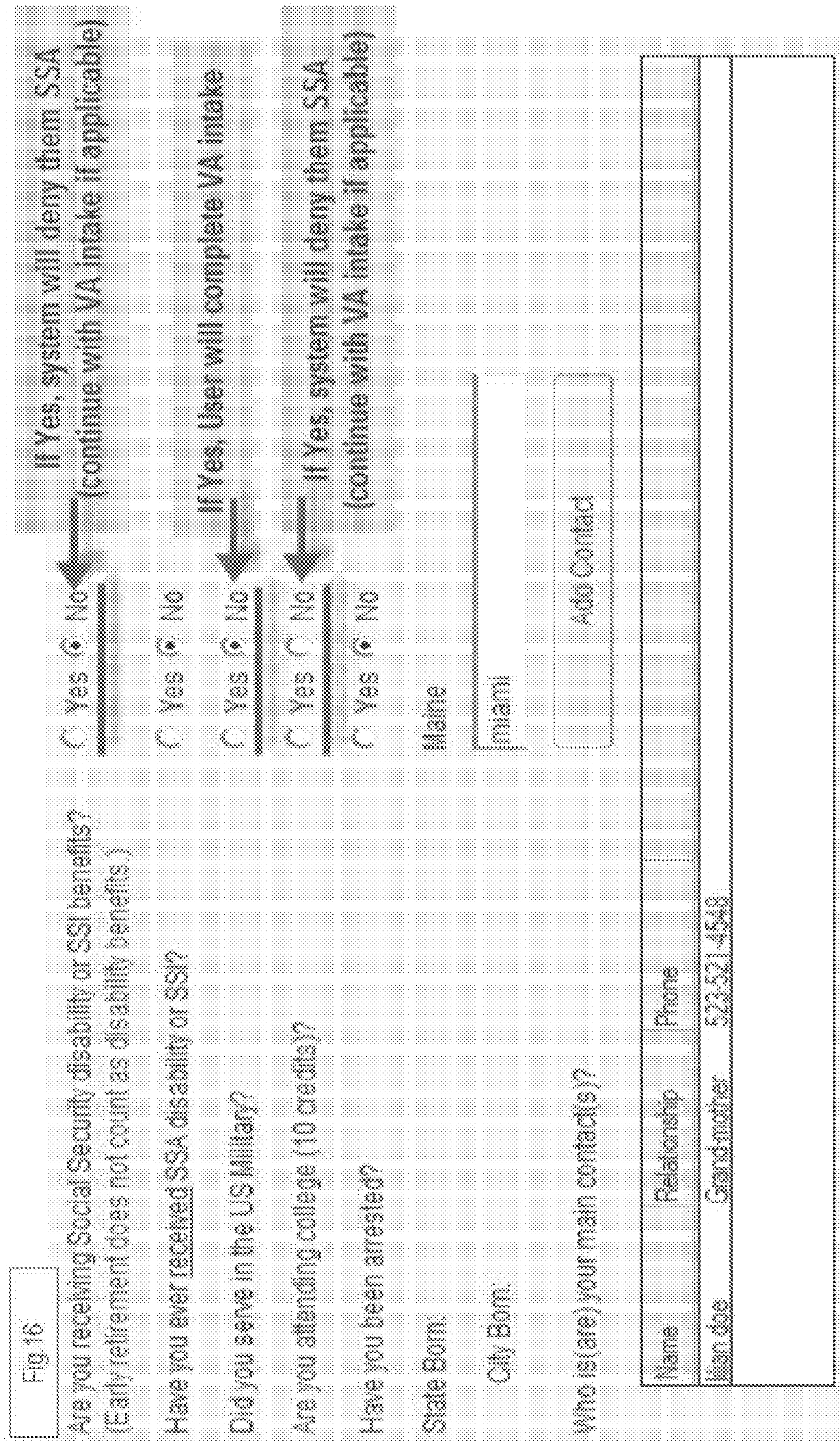


Fig 16
Are you receiving Social Security disability or SSI benefits?
(Early retirement does not count as disability benefits.)
Yes
No
If Yes, system will deny them SSA
(continue with VA intake if applicable)
Have you ever received SSA disability or SSI?
Yes
No
If Yes, User will complete VA intake
Did you serve in the US Military?
Yes
No
Are you attending college (10 credits)?
Yes
No
If Yes, system will deny them SSA
(continue with VA intake if applicable)
Have you been arrested?
Yes
No
State Born:
Maine
City Born:
miami
Add Contact
Who is(are) your main contact(s)?
Name
Relationship
Phone
lilian doe
Grand-mother
523-521-4549

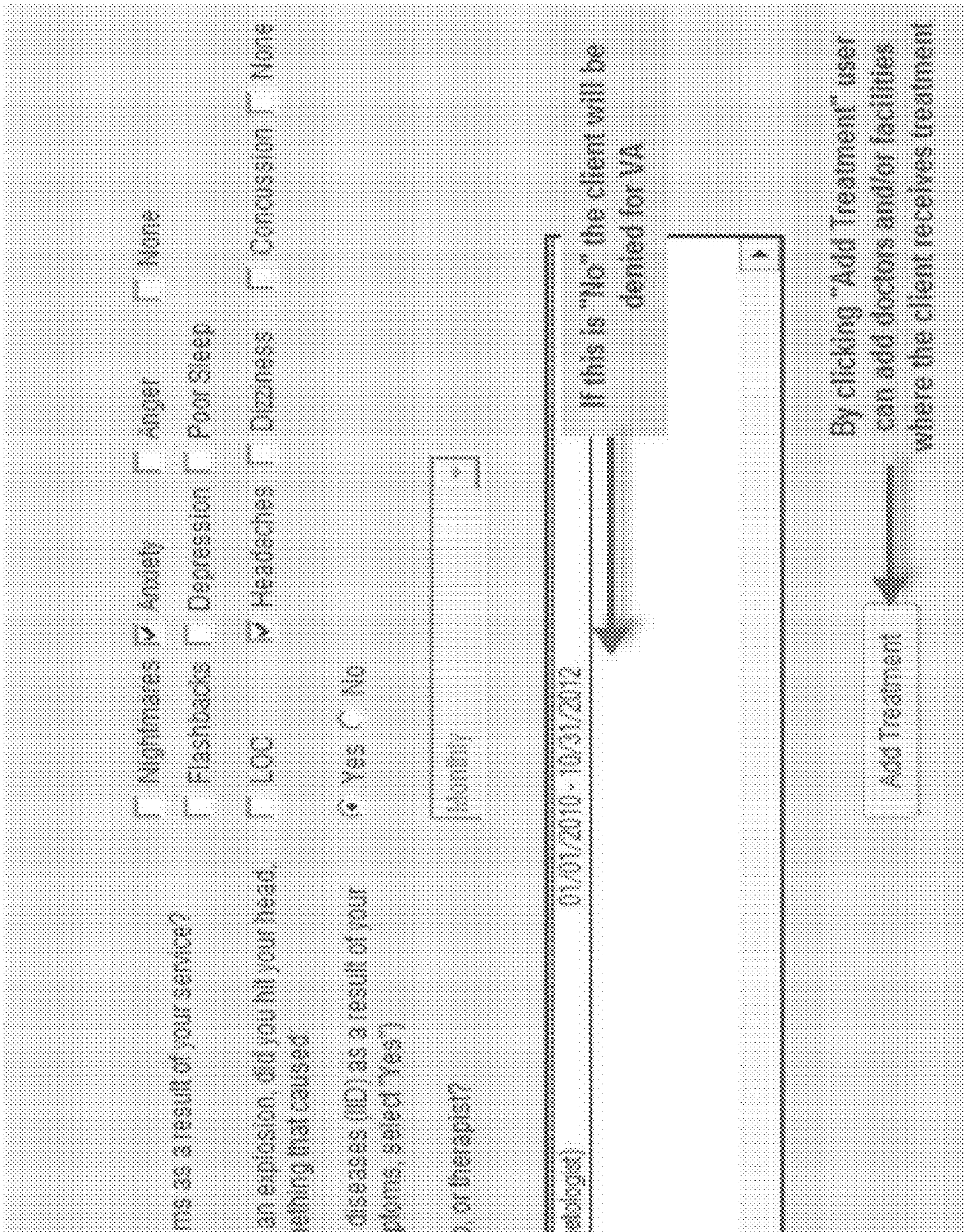

Intake Sheet
VA Medical Conditions
ptoms as a result of your service?
Nightmares
Anxiety
Anger
None
Flashbacks
Depression
Poor Sleep
During service were you close to an explosion, did you hit your head, get into a fight or experience something that caused
LOC
Headaches
Dizziness
Concussion
None
Do you have any injury, illness or diseases (IID) as a result of your military service (if any above symptoms, select "Yes")
Yes
No
How often do you go to a dr, hosp. or therapist?
Monthly
If this is "No" the client will be denied for VA
Medical Treatment
Dr Glen A Barden (Rheumatologist)
01/01/2010 - 10/31/2012
Add each doctor or hospital
Add Treatment
By clicking "Add Treatment" user can add doctors and/or facilities where the client receives treatment

FIG. 17

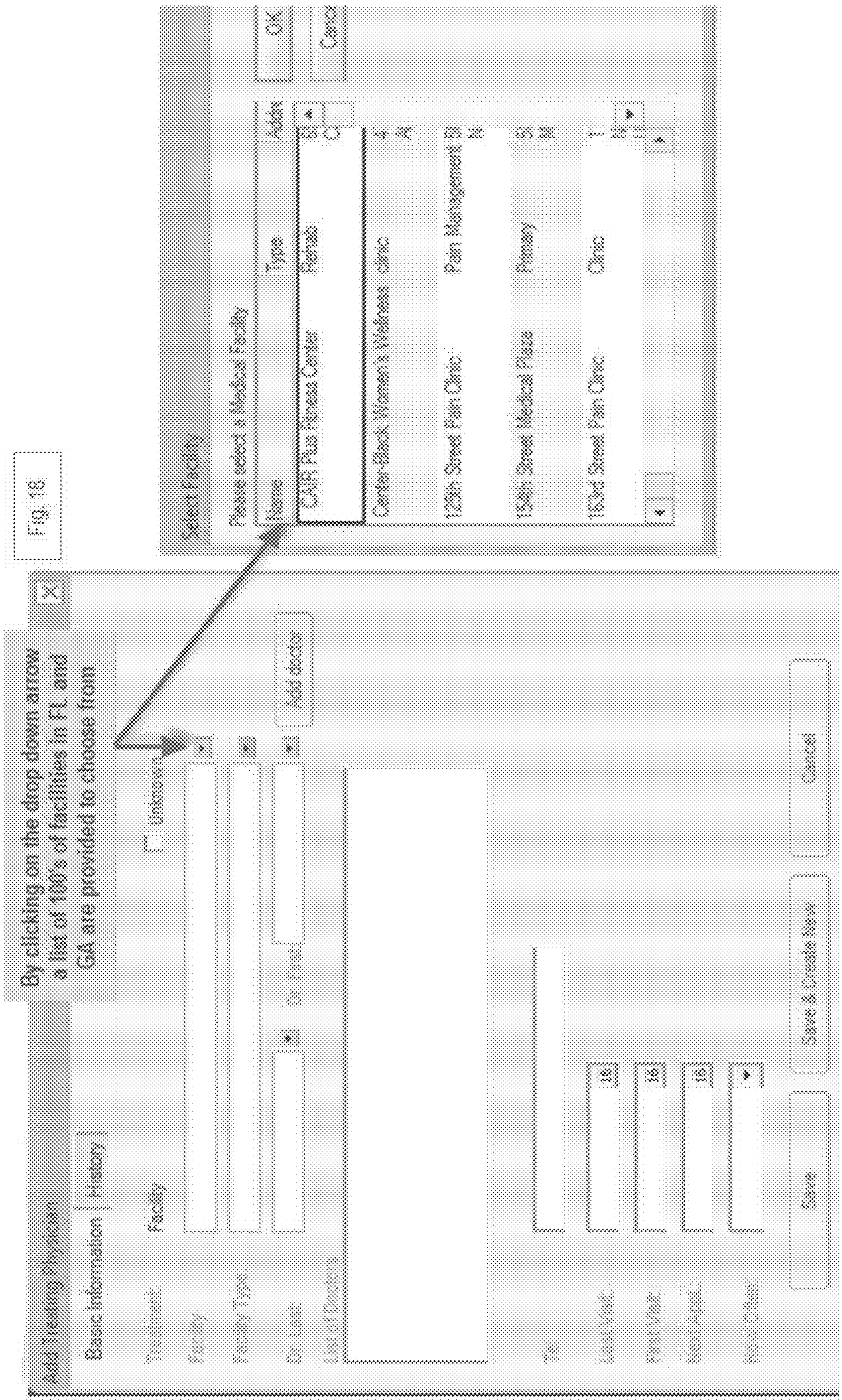

By clicking on the drop down arrow a list of 100's of facilities in FL and GA are provided to choose from
Add Treating Physician
Basic Information
History
Facility
Unknown
Add doctor
Save
Save & Create New
Cancel
Select Facility
Please select a Medical Facility
Name
Type
OK

Fig. 18

Fig. 19

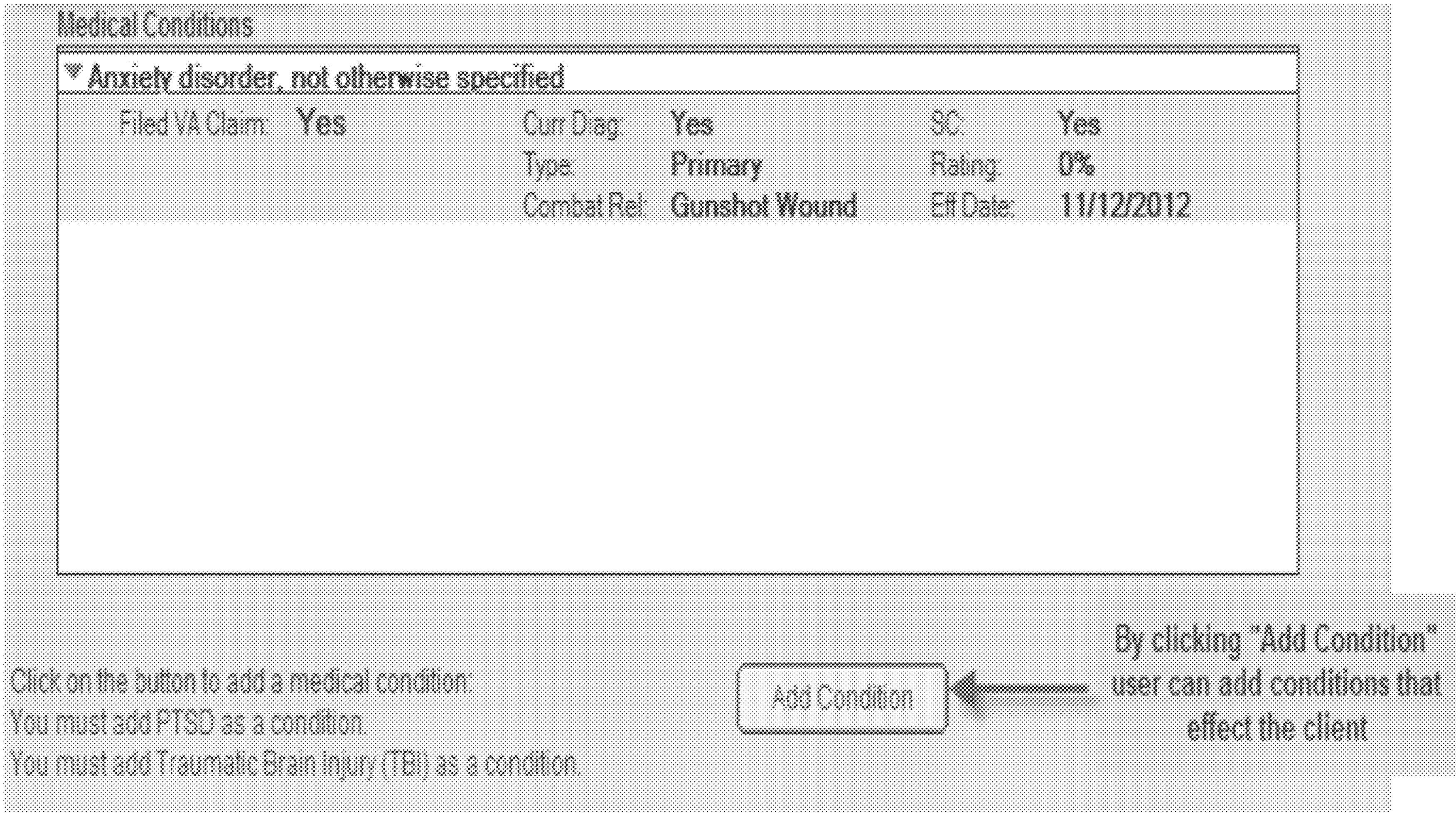

Medical Conditions
Anxiety disorder, not otherwise specified
Filed VA Claim: Yes
Curr Diag: Yes
SC: Yes
Type: Primary
Rating: 0%
Combat Rel: Gunshot Wound
Eff Date: 11/12/2012
Click on the button to add a medical condition:
You must add PTSD as a condition.
You must add Traumatic Brain Injury (TBI) as a condition.
Add Condition
By clicking "Add Condition" user can add conditions that effect the client

Fig. 20

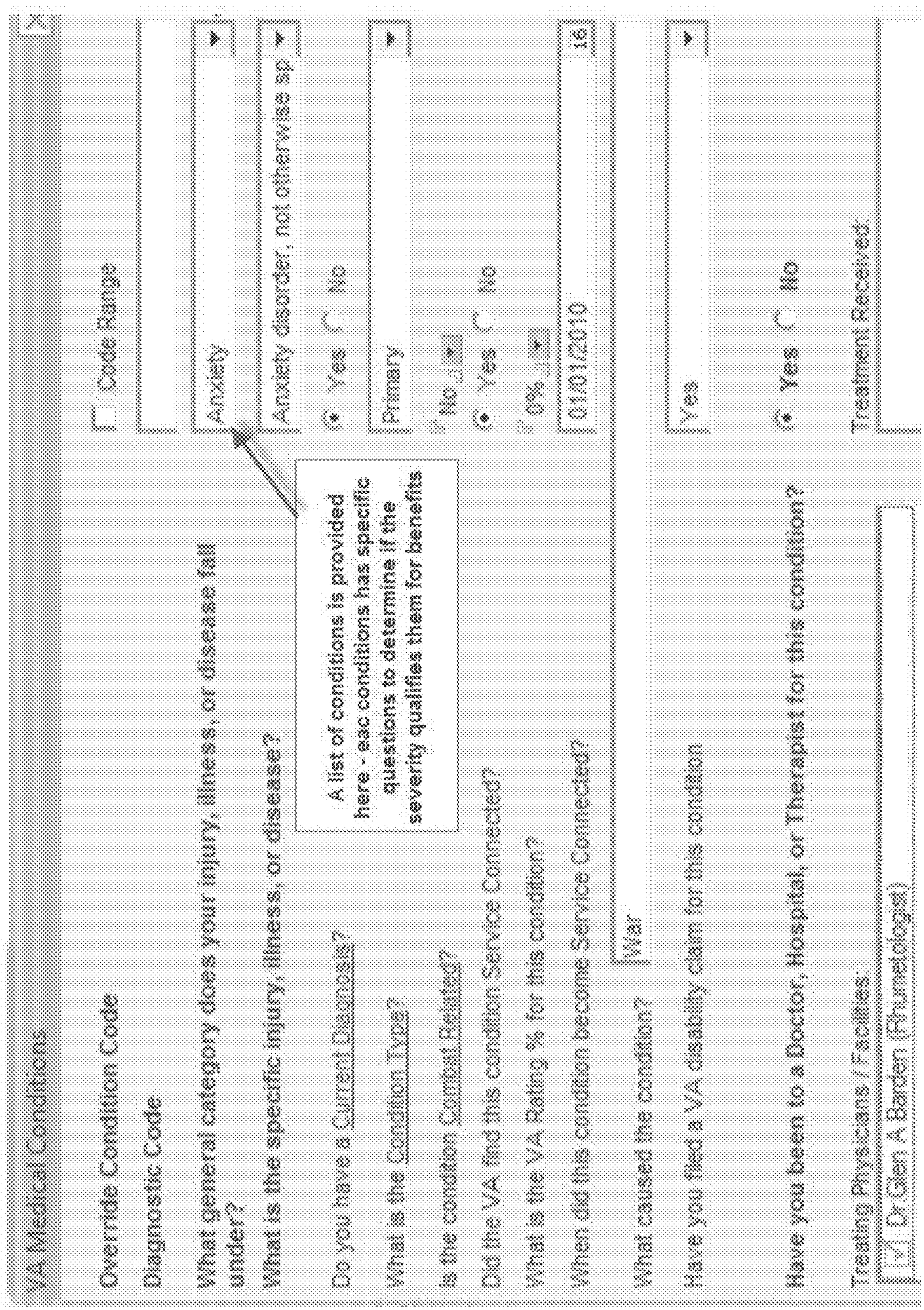

VA Medical Conditions
Override Condition Code
Code Range
Diagnostic Code
What general category does your injury, illness, or disease fall under?
Anxiety
What is the specific injury, illness, or disease?
Anxiety disorder, not otherwise sp
A list of conditions is provided here - eac conditions has specific questions to determine if the severity qualifies them for benefits
Do you have a Current Diagnosis?
Yes No
What is the Condition Type?
Primary
Is the condition Combat Related?
No
Did the VA find this condition Service Connected?
Yes No
What is the VA Rating % for this condition?
0%
When did this condition become Service Connected?
01/01/2010
What caused the condition?
War
Have you filed a VA disability claim for this condition
Yes
Have you been to a Doctor, Hospital, or Therapist for this condition?
Yes No
Treating Physicians / Facilities:
Dr Glen A Barden (Rhumatologist)
Treatment Received:

Fig. 21

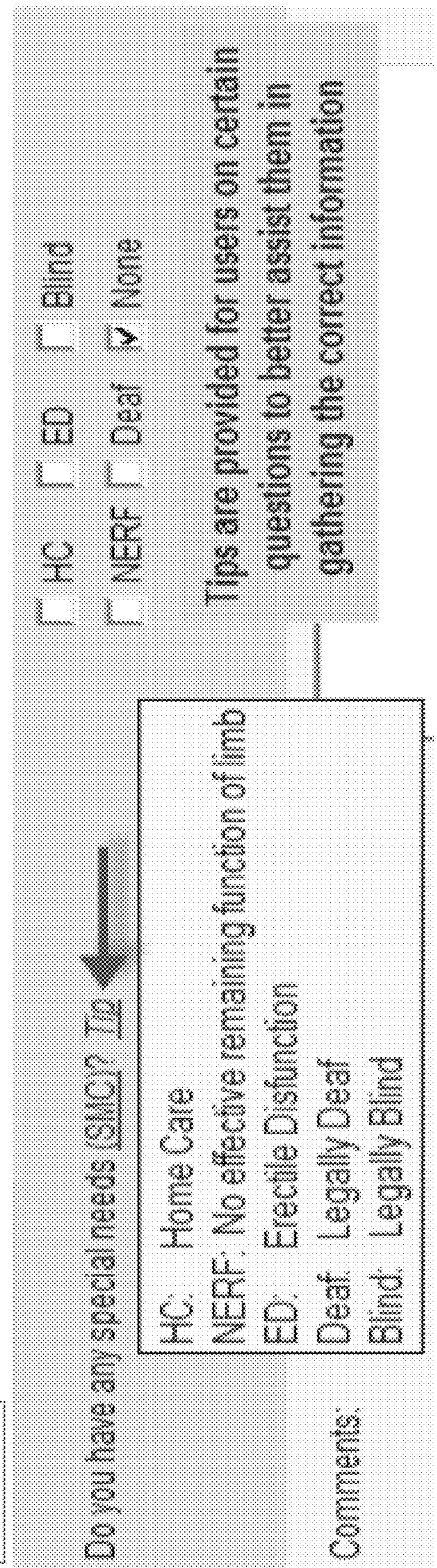

Do you have any special needs (SMC)? Tip
HC ED Blind
NERF Deaf None
Tips are provided for users on certain questions to better assist them in gathering the correct information
HC: Home Care
NERF: No effective remaining function of limb
ED: Erectile Disfunction
Deaf: Legally Deaf
Blind: Legally Blind
Comments:

Fig 22

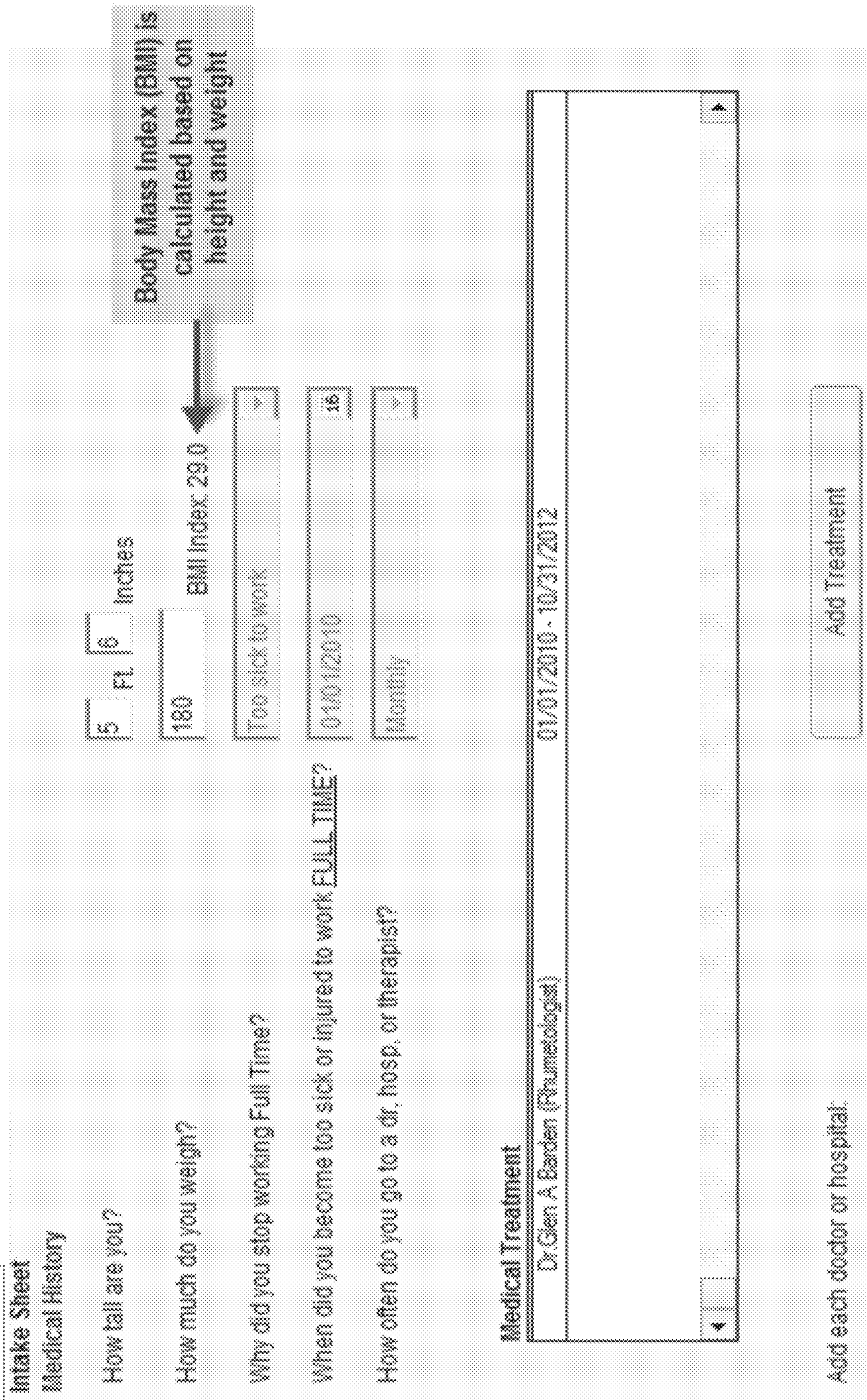

Intake Sheet
Medical History
How tall are you?
5 Ft. 6 Inches
How much do you weigh?
180
BMI Index: 29.0
Body Mass Index (BMI) is calculated based on height and weight
Why did you stop working Full Time?
Too sick to work
When did you become too sick or injured to work FULL TIME?
01/01/2010
How often do you go to a dr, hosp, or therapist?
Monthly
Medical Treatment
Dr.Glen A Barden (Rheumatologist)
01/01/2010 - 10/31/2012
Add Treatment
Add each doctor or hospital.

Fig. 23

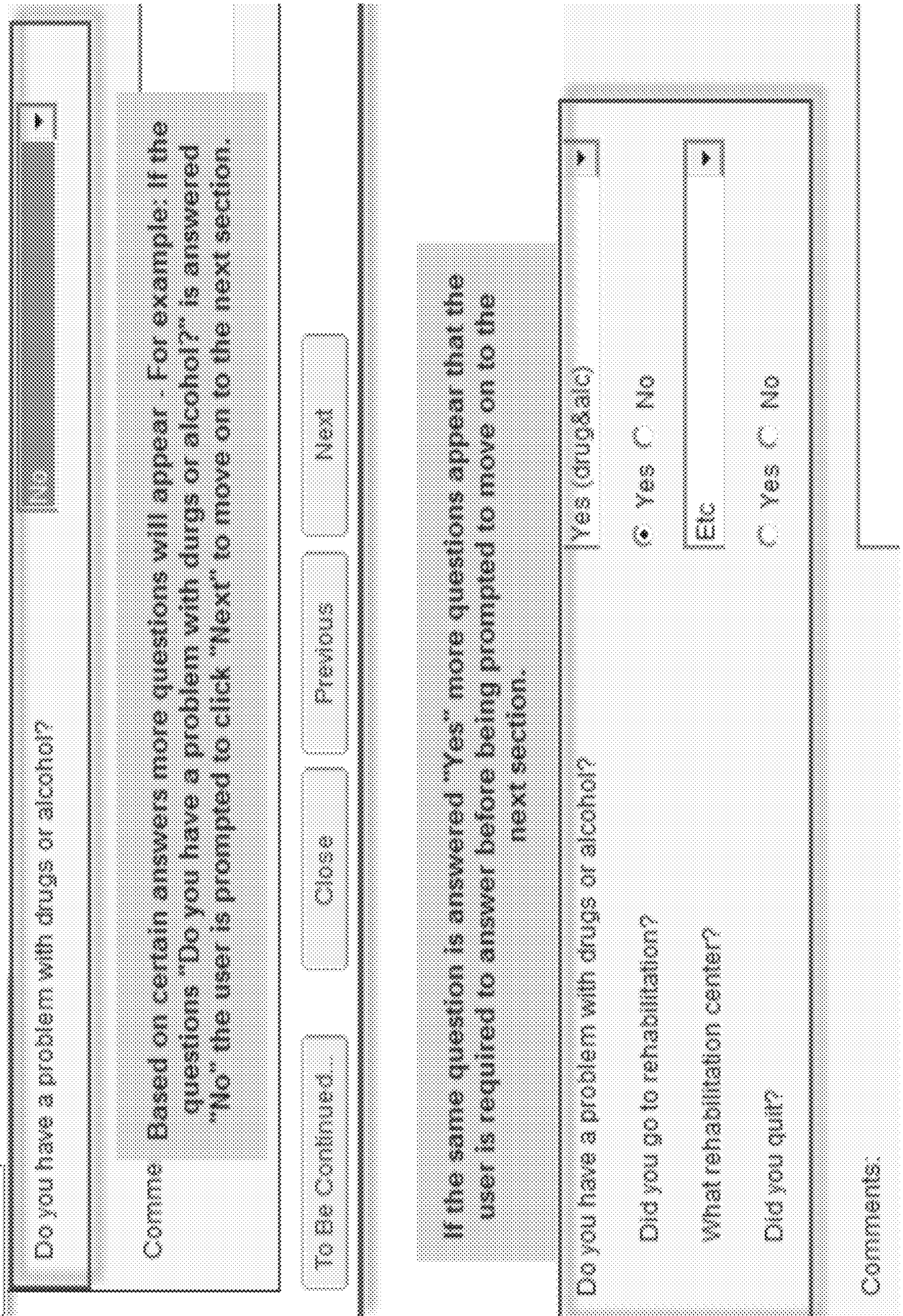
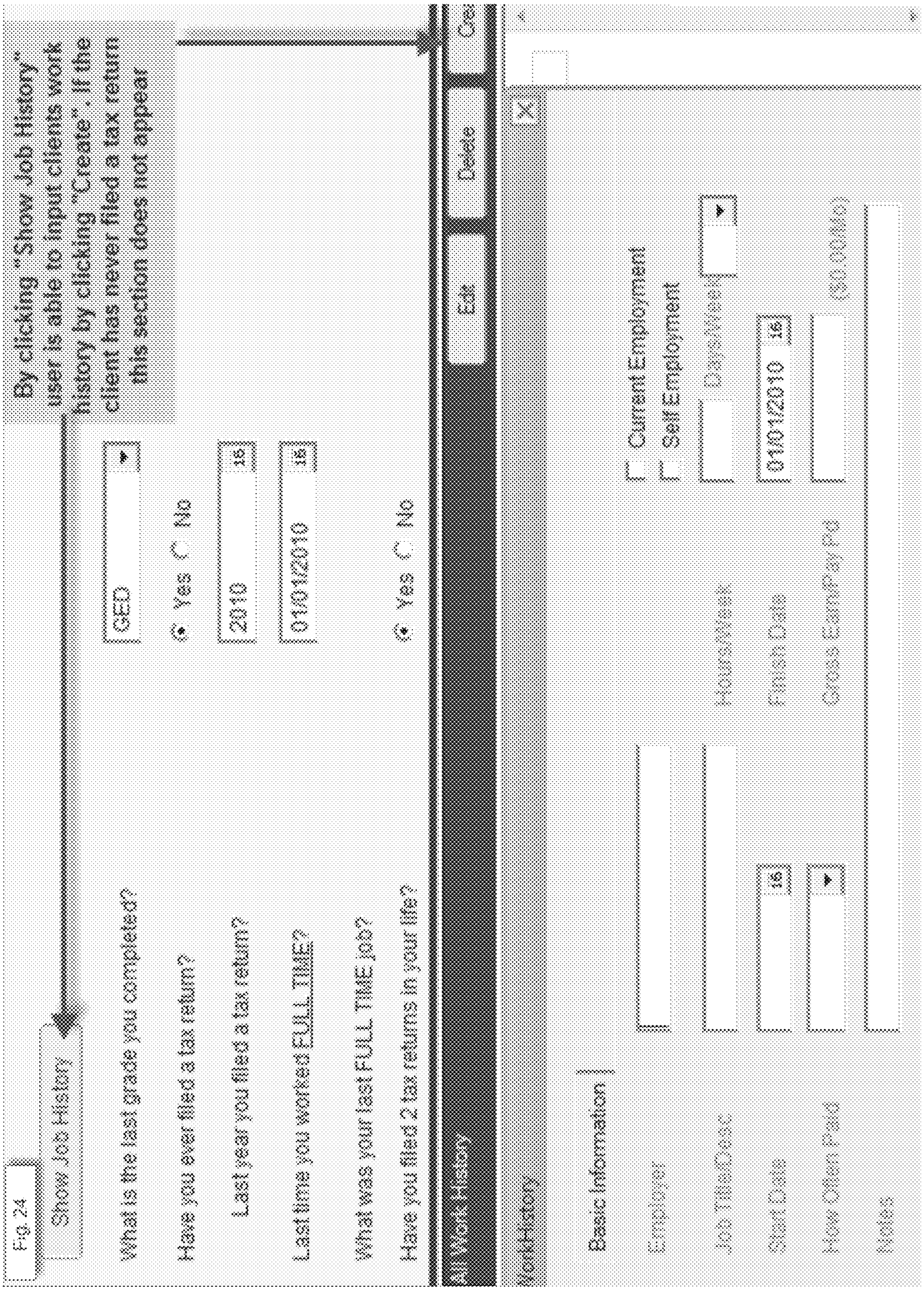

Do you have a problem with drugs or alcohol?
No
Comme
Based on certain answers more questions will appear - For example: If the questions "Do you have a problem with durgs or alcohol?" is answered "No" the user is prompted to click "Next" to move on to the next section.
To Be Continued..
Close
Previous
Next
If the same question is answered "Yes" more questions appear that the user is required to answer before being prompted to move on to the next section.
Do you have a problem with drugs or alcohol?
Yes (drug&alc)
Did you go to rehabilitation?
Yes
No
What rehabilitation center?
Etc
Did you quit?
Yes
No
Comments:

Fig. 24



By clicking "Show Job History" user is able to input clients work history by clicking "Create". If the client has never filed a tax return this section does not appear
Show Job History
What is the last grade you completed?
GED
Have you ever filed a tax return?
Yes No
Last year you filed a tax return?
2010
Last time you worked FULL TIME?
01/01/2010
What was your last FULL TIME job?
Have you filed 2 tax returns in your life?
Yes No
All Work History
Edit
Delete
WorkHistory
Basic Information
Employer
Job Title/Desc
Start Date
How Often Paid
Notes
Hours/Week
Finish Date
01/01/2010
Gross Earn/Pay Pd
Current Employment
Self Employment
Days/Week
($0.00/Mo)

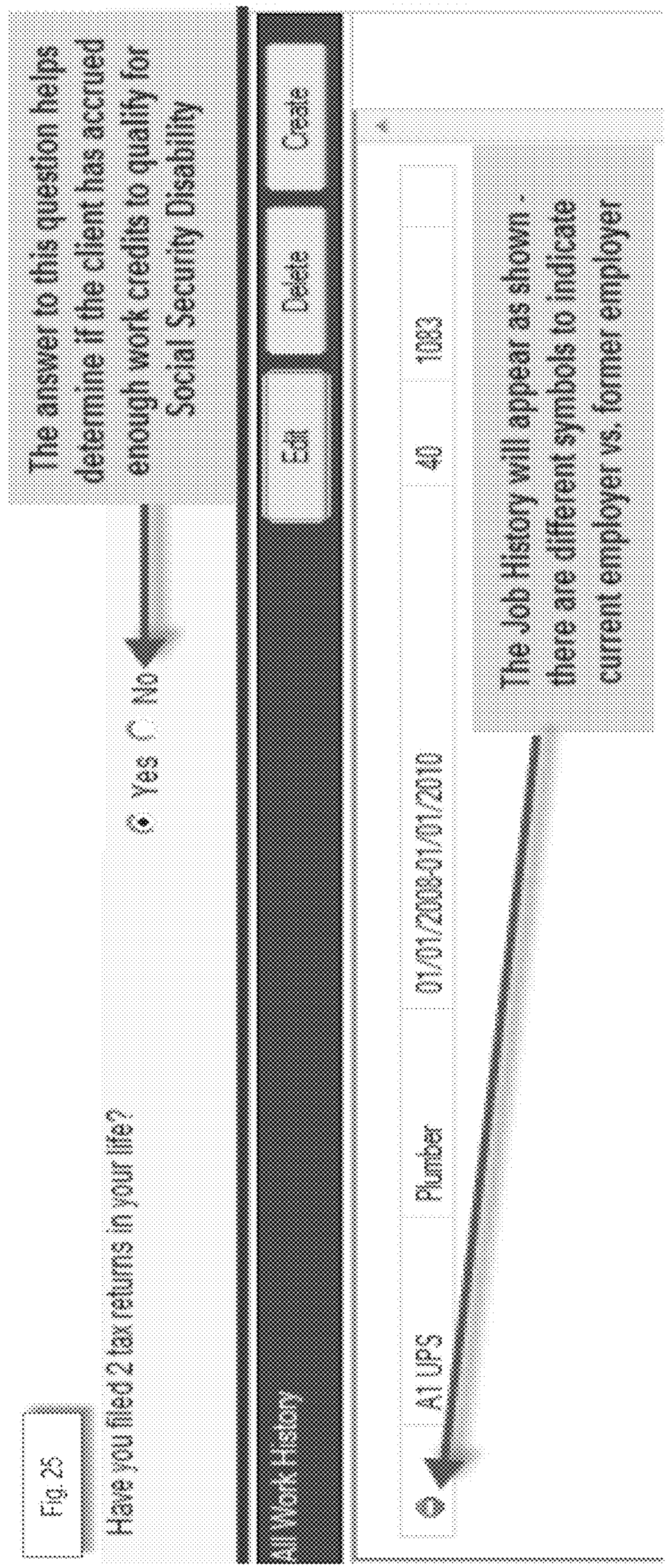
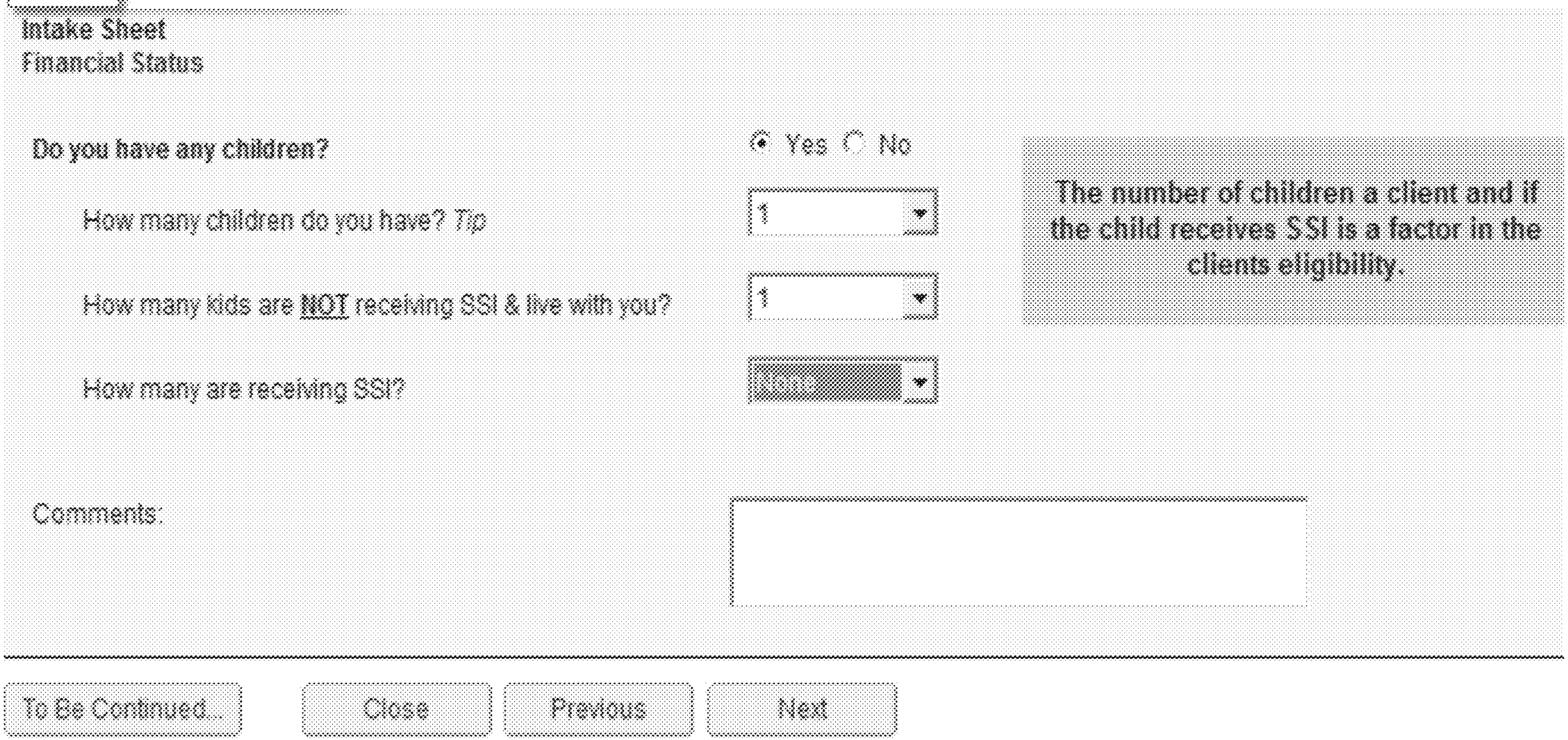

Have you filed 2 tax returns in your life?
Yes No
The answer to this question helps determine if the client has accrued enough work credits to qualify for Social Security Disability
All Work History
Edit
Delete
Create
A1 UPS
Plumber
01/01/2008-01/01/2010
40
1083
The Job History will appear as shown - there are different symbols to indicate current employer vs. former employer

Fig. 25

Fig. 28


Intake Sheet
Financial Status
Do you have any children?
Yes No
How many children do you have? Tip
1
How many kids are NOT receiving SSI & live with you?
1
How many are receiving SSI?
The number of children a client and if the child receives SSI is a factor in the clients eligibility.
Comments:
To Be Continued...
Close
Previous
Next

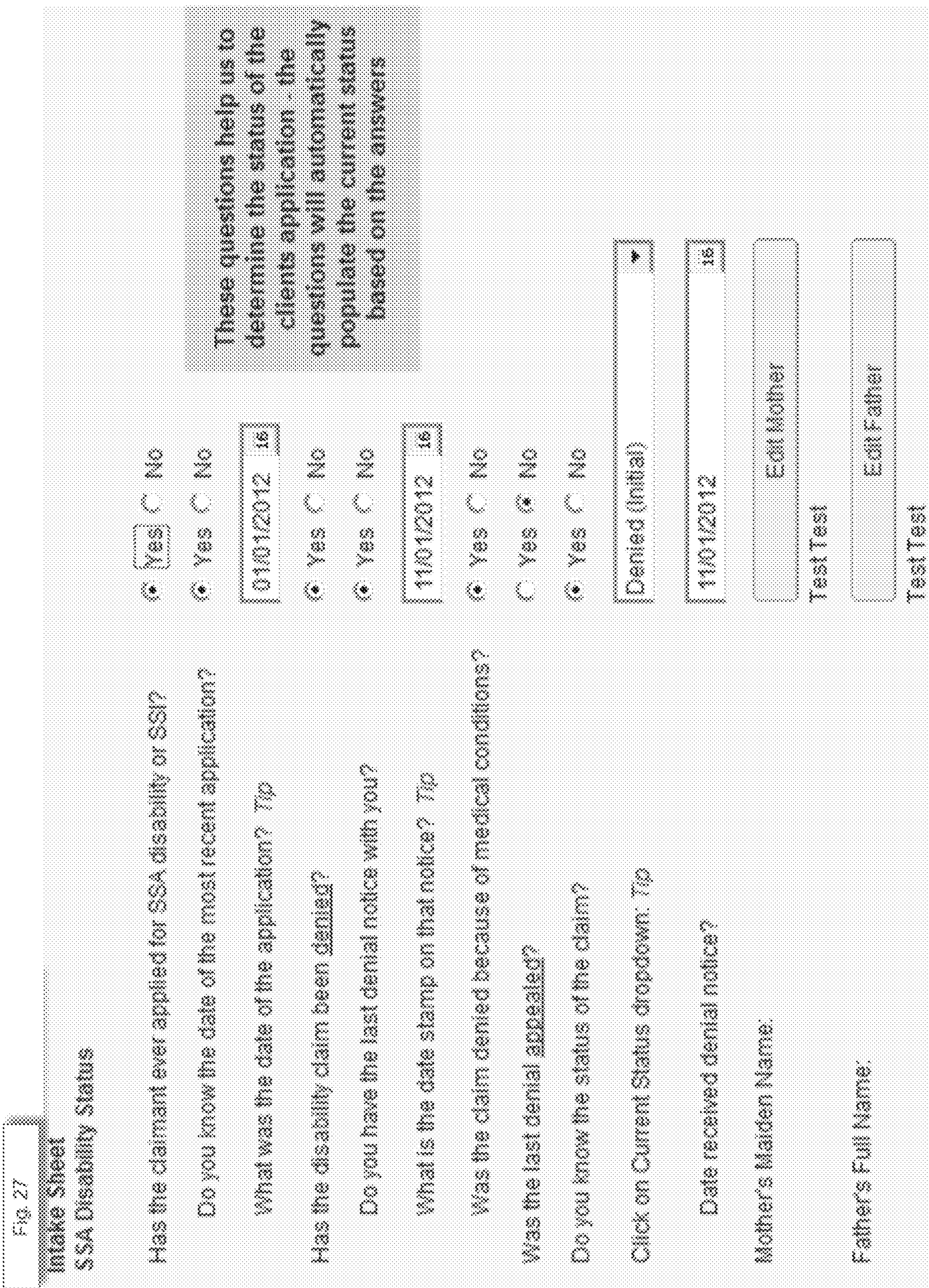

Intake Sheet
SSA Disability Status
Has the claimant ever applied for SSA disability or SSI?
Yes No
Do you know the date of the most recent application?
Yes No
What was the date of the application? Tip
01/01/2012
Has the disability claim been denied?
Yes No
Do you have the last denial notice with you?
Yes No
What is the date stamp on that notice? Tip
11/01/2012
Was the claim denied because of medical conditions?
Yes No
Was the last denial appealed?
Yes No
Do you know the status of the claim?
Yes No
Click on Current Status dropdown: Tip
Denied (Initial)
Date received denial notice?
11/01/2012
Mother's Maiden Name:
Test Test
Edit Mother
Father's Full Name:
Test Test
Edit Father
These questions help us to determine the status of the clients application - the questions will automatically populate the current status based on the answers

Fig. 27

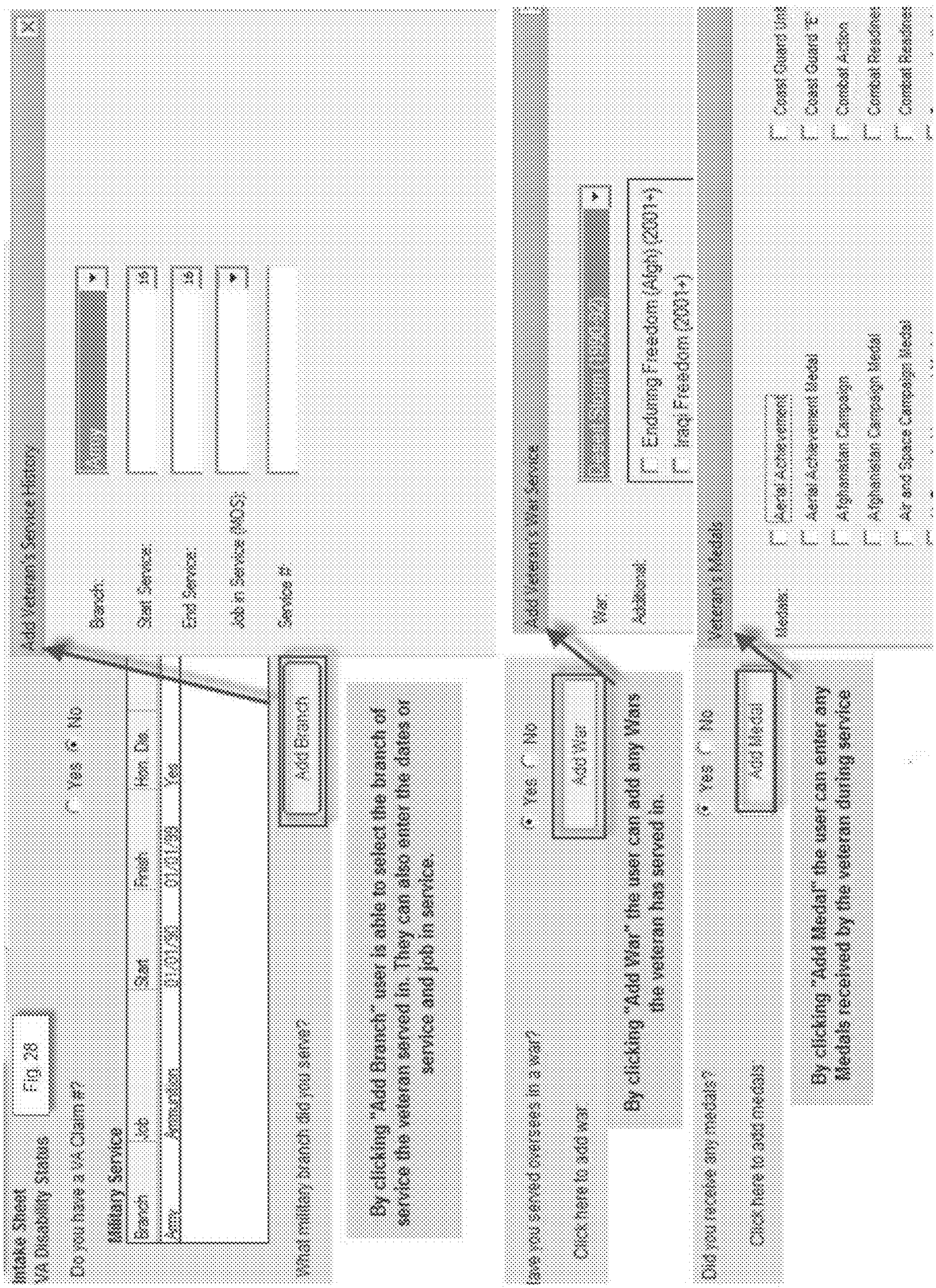
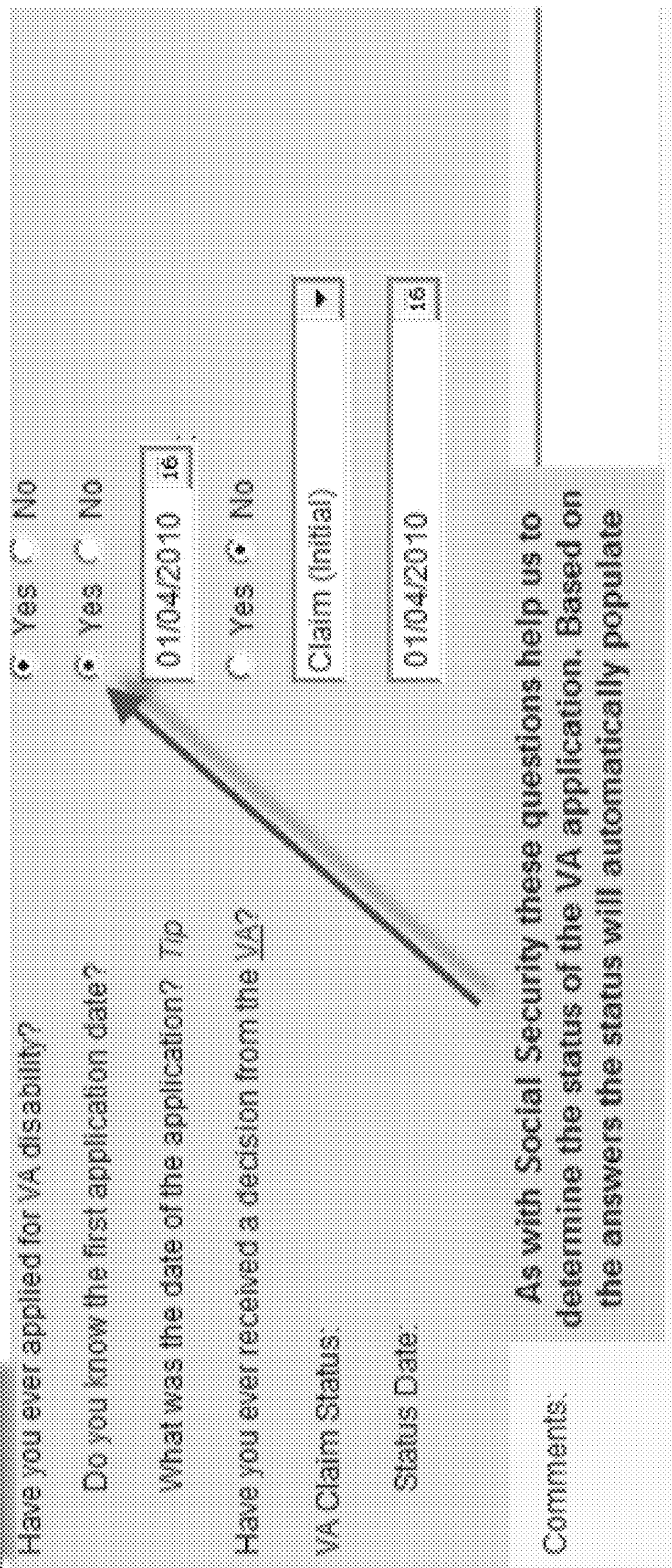


Fig 28
Intake Sheet
VA Disability Status
Do you have a VA Claim #?
Yes No
Military Service
Branch
Job
Start
Finish
Hon. Dis.
Army
Ammunition
01/01/90
01/01/98
Yes
What military branch did you serve?
Add Branch
By clicking "Add Branch" user is able to select the branch of service the veteran served in. They can also enter the dates of service and job in service.
Add Veteran's Service History
Branch:
Start Service:
End Service:
Job in Service (MOS):
Service #:
Have you served overseas in a war?
Yes No
Add War
Click here to add war
By clicking "Add War" the user can add any Wars the veteran has served in.
Add Veteran's War Service
War:
Additional:
Enduring Freedom (Afgh) (2001+)
Iraqi Freedom (2001+)
Did you receive any medals?
Yes No
Add Medal
Click here to add medals
By clicking "Add Medal" the user can enter any Medals received by the veteran during service
Veteran's Medals
Medals:
Aerial Achievement
Aerial Achievement Medal
Afghanistan Campaign
Afghanistan Campaign Medal
Air and Space Campaign Medal
Combat Action

Fig. 29


Have you ever applied for VA disability?
Yes
No
Do you know the first application date?
Yes
No
What was the date of the application? Tip
01/04/2010
Have you ever received a decision from the VA?
Yes
No
VA Claim Status:
Claim (Initial)
Status Date:
01/04/2010
Comments:
As with Social Security these questions help us to determine the status of the VA application. Based on the answers the status will automatically populate

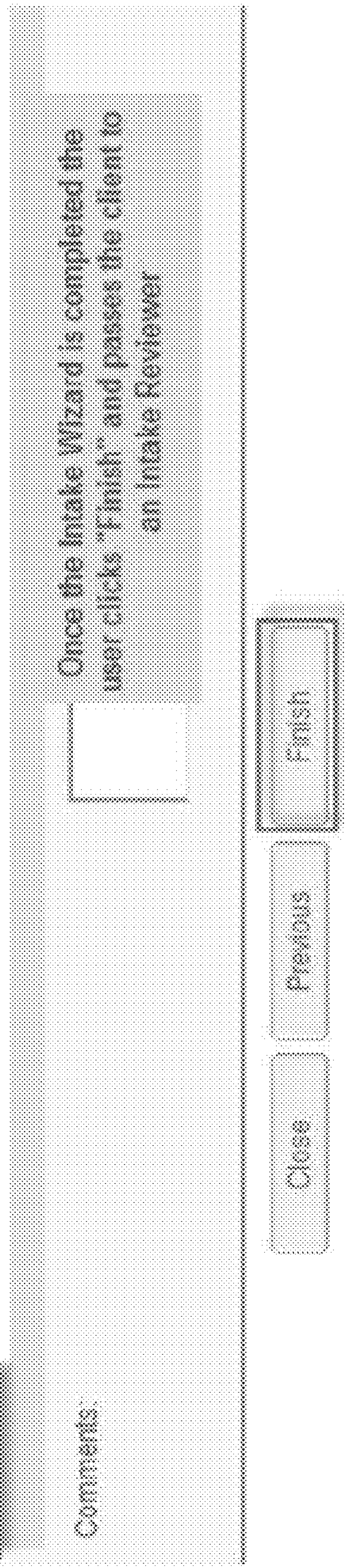

Once the Intake Wizard is completed the user clicks "Finish" and passes the client to an Intake Reviewer
Finish
Previous
Close
Comments:

Fig. 30

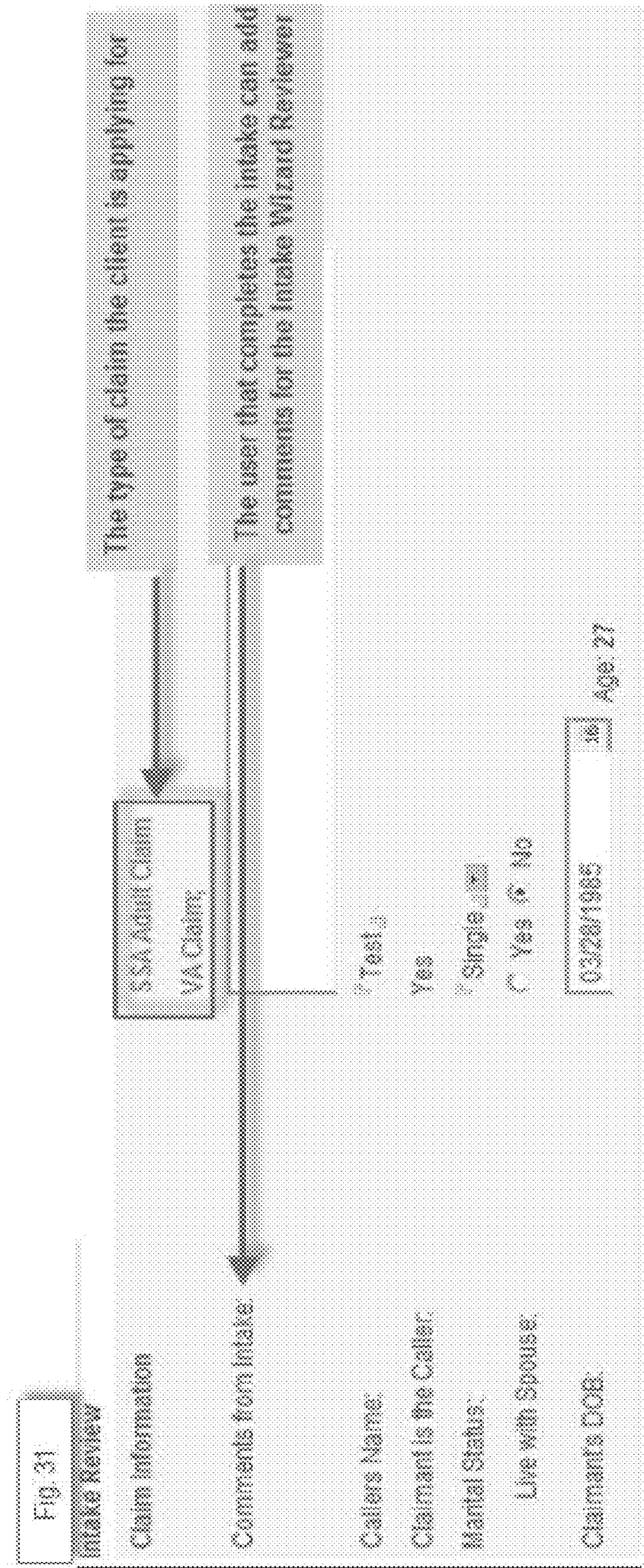

Intake Review
Claim Information
SSA Adult Claim
VA Claims
The type of claim the client is applying for
Comments from Intake:
The user that completes the intake can add comments for the Intake Wizard Reviewer
Callers Name:
Test
Claimant is the Caller:
Yes
Marital Status:
Single
Live with Spouse:
Yes No
Claimant's DOB:
03/28/1985
Age 27

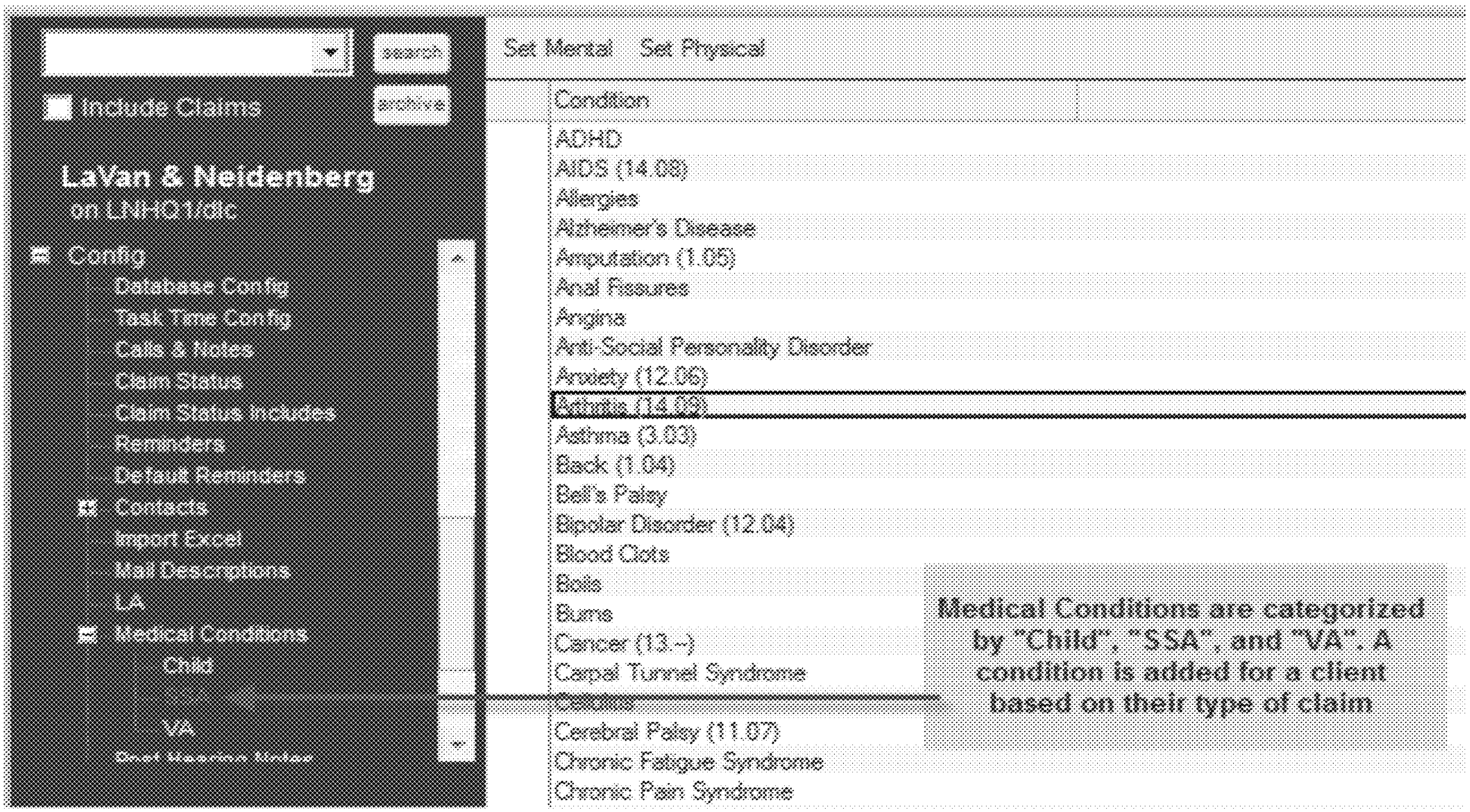
Fig 31

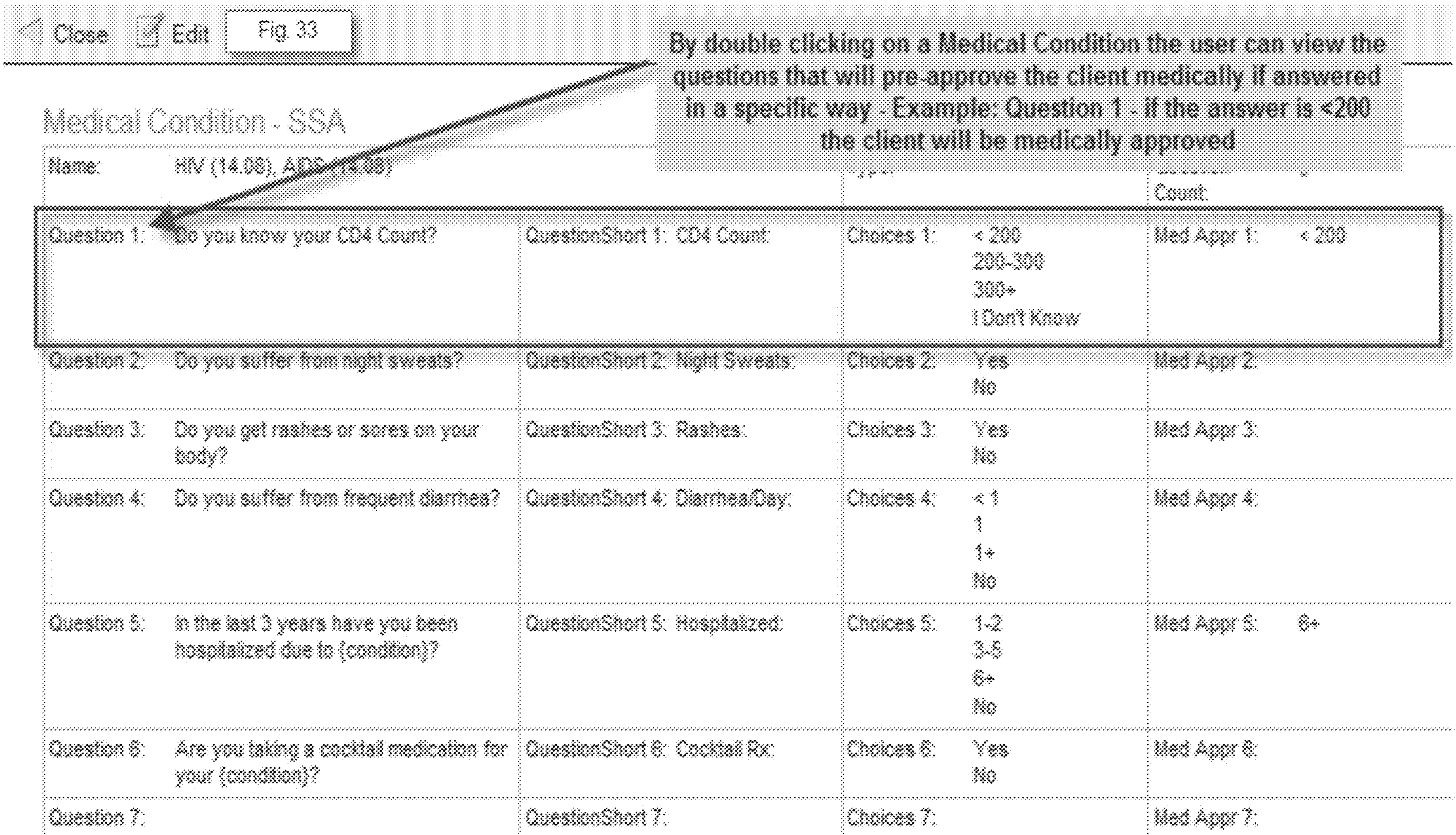
Medical Conditions

Fig. 32

Hundreds if medical conditions have been added to the database. Each condition has specific questions that can pre-approve a client for medical reasons on the Intake Wizard.

These views show the medical conditions categorized by what type of claim the client has:




Close
Edit
Fig 33
By double clicking on a Medical Condition the user can view the questions that will pre-approve the client medically if answered in a specific way - Example: Question 1 - if the answer is <200 the client will be medically approved
Medical Condition - SSA
Name: HIV (14.08),
Count:
Question 1: Do you know your CD4 Count?
QuestionShort 1: CD4 Count:
Choices 1: < 200
200-300
300+
I Don't Know
Med Appr 1: < 200
Question 2: Do you suffer from night sweats?
QuestionShort 2: Night Sweats:
Choices 2: Yes
No
Med Appr 2:
Question 3: Do you get rashes or sores on your body?
QuestionShort 3: Rashes:
Choices 3: Yes
No
Med Appr 3:
Question 4: Do you suffer from frequent diarrhea?
QuestionShort 4: Diarrhea/Day:
Choices 4: < 1
1
1+
No
Med Appr 4:
Question 5: In the last 3 years have you been hospitalized due to {condition}?
QuestionShort 5: Hospitalized:
Choices 5: 1-2
3-5
6+
No
Med Appr 5: 6+
Question 6: Are you taking a cocktail medication for your {condition}?
QuestionShort 6: Cocktail Rx:
Choices 6: Yes
No
Med Appr 6:
Question 7:
QuestionShort 7:
Choices 7:
Med Appr 7:

Intake Wizard – Termination Reasons

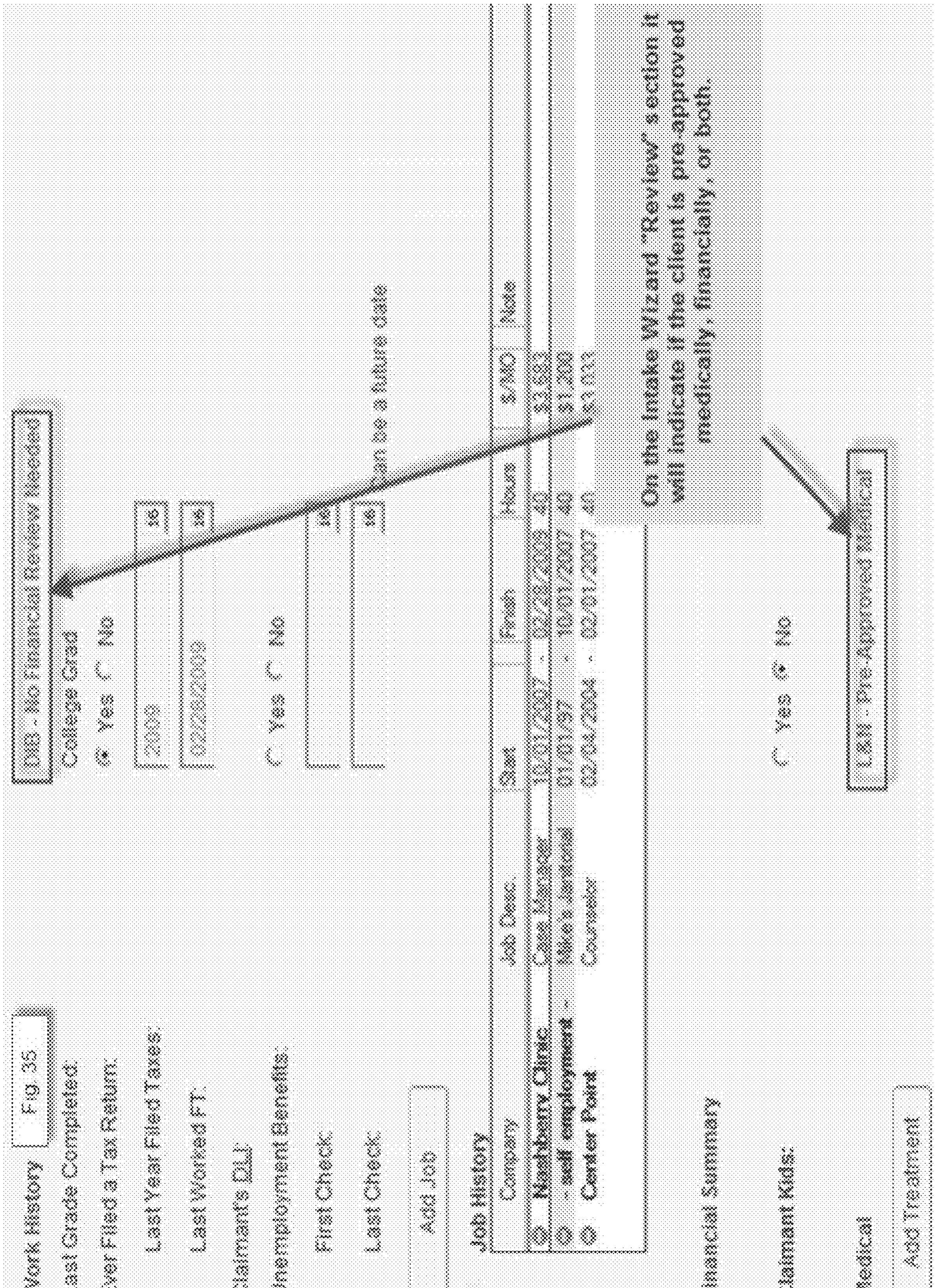
Fig. 34a

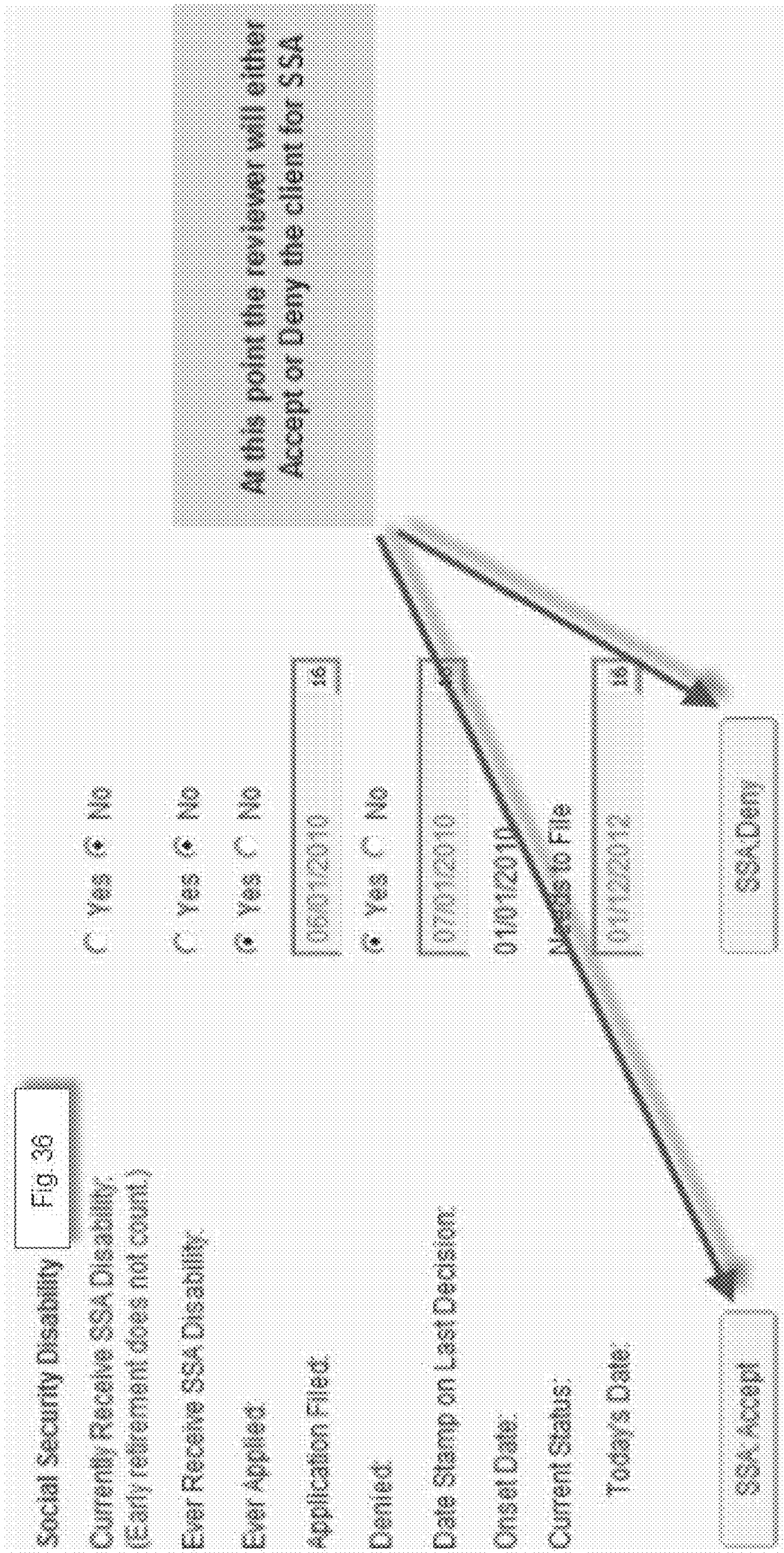
The following chart explains the Termination Reasons we have implemented in the Intake Wizard. If the potential client meets any of this criteria their intake wizard will be denied internally with a brief explanation why.

<table>
<tr><th>Code:</th><th>Translation:</th></tr>
<tr><td>cl_ifWithYou = "No" & cl_ifPowerAtty = "No" & cl_ifGetClaimant = "No";"NOPOWERATTY";</td><td>If client is not present, 3rd party attempting to complete intake without power of attorney</td></tr>
<tr><td>intake_isReceivingSSA = "Yes" & intake_isSSACutOff = "No";
"NOTCUTOFF";</td><td>If client is currently receiving benefits</td></tr>
<tr><td>clLegRes = "No";
"NOTLEGAL";</td><td>If client is not a legal resident of the U.S.</td></tr>
<tr><td>cl_ifArrestWarrant = "Yes";
"ARRESTWARRANT";</td><td>If client has a pending arrest warrant</td></tr>
<tr><td>dsp_clTotalIncomeCurrentJob > 1000;
"DIBJOBLIMIT";</td><td>If client has income greater than $1000 and is eligible for Disability Insurance Benefits</td></tr>
<tr><td>(clKidsLive != "") | clAge < 18 & clChildParentsHome = "1" & ((clTotalSalary > clTotalSalaryLimit1Parent) | (clTotalOtherInc > clTotalOtherIncLimit1Parent));
"CHILD1PARENT";</td><td>If intake is for a child and parents income exceeds limits set forth by SSA (see Deeming Chart)</td></tr>
<tr><td>dsp_clTotalIncomeCurrentJob > 694 & (cl_ifTaxReturns = "No" | cl_ifTaxesEver = "No");
"SSIJOBLIMIT";</td><td>If client has income greater than $684 and is only eligible for Supplemental Security Income</td></tr>
<tr><td>(clKidsLive != "") | clMaritalStatus = "Married" & (cl_ifTaxReturns = "No" | cl_ifTaxesEver = "No") & ((clSpouseMo > clSpouseIncLimit) | (clSpouseMoPension > clSpousePenLimit));
"SSISPOUSE";</td><td>If client's spouse exceeds income limits set forth by SSA (see Deeming Chart)</td></tr>
<tr><td>clMaritalStatus = "Married" & clTotalSalary > 9999 & (cl_ifTaxReturns = "No" | cl_ifTaxesEver = "No");
"SSITOTALMARRIED";</td><td>If client and spouse's total income exceeds limits set forth by SSA (see Deeming Chart)</td></tr>
</table>

Fig. 34b

<table>
<tr><th>Code:</th><th>Translation:</th></tr>
<tr><td>clMaritalStatus = "Married" & (cl_ifTaxReturns = "No" |
cl_ifTaxesEver = "No") & clTotalCars > 3;
"SSI2CAR";</td><td>If client owns more than 1 vehicle, or if married owns more than 2 vehicles</td></tr>
<tr><td>clMaritalStatus = "Married" & (cl_ifTaxReturns = "No" |
cl_ifTaxesEver = "No") & clTotalProperties > 1;
"SSI2PROPERTY";</td><td>If client owns more than 1 property, or if married owns more than 2 properties</td></tr>
<tr><td>clMaritalStatus = "Married" & (cl_ifTaxReturns = "No" |
cl_ifTaxesEver = "No") & clTotalBank >= 3000;
"SSI3000BANK";</td><td>If client has more than $2000 in the bank</td></tr>
<tr><td>clAge > 67;
"OVER67";</td><td>If client is over age 67</td></tr>
<tr><td>clAge > 64 & SSA_Current = "Needs to File";</td><td>If client is 64 or older and has the claim status "Needs to File"</td></tr>
<tr><td>cl_ifGetBenefitsStoppedFix = "No";
"FINANCIALCUTOFFNOTRESOLVED";</td><td>If client's benefits were stopped for technical reasons</td></tr>
<tr><td>clAge > 64 & (clAodLnAge >= 65);
"OVER64BADAOD";</td><td>If client is over 65 and their onset date is too long ago</td></tr>
</table>


Work History
Fig. 35
DIB - No Financial Review Needed
Last Grade Completed:
College Grad
Ever Filed a Tax Return:
Yes No
Last Year Filed Taxes:
2009
Last Worked FT:
02/28/2009
Claimant's DLI:
Unemployment Benefits:
Yes No
First Check:
Last Check:
Can be a future date
Add Job
Job History
Company Job Desc. Start Finish Hours $/MO Note
Nashberry Clinic Case Manager 10/01/2007 - 02/28/2009 40 $3,683
- self employment - Mike's Janitorial 01/01/97 - 10/01/2007 40 $1,200
Center Point Counselor 02/04/2004 - 02/01/2007 40 $3,033
On the Intake Wizard "Review" section it will indicate if the client is pre-approved medically, financially, or both.
Financial Summary
Claimant Kids:
Yes No
Medical
L&II - Pre-Approved Medical
Add Treatment


Social Security Disability
Fig. 36
Currently Receive SSA Disability:
(Early retirement does not count.)
Ever Receive SSA Disability:
Ever Applied:
Application Filed:
Denied:
Date Stamp on Last Decision:
Onset Date:
Current Status:
Today's Date:
Yes No
Yes No
Yes No
Yes No
01/01/2010
Needs to File
SSA Accept
SSA Deny
At this point the reviewer will either Accept or Deny the client for SSA

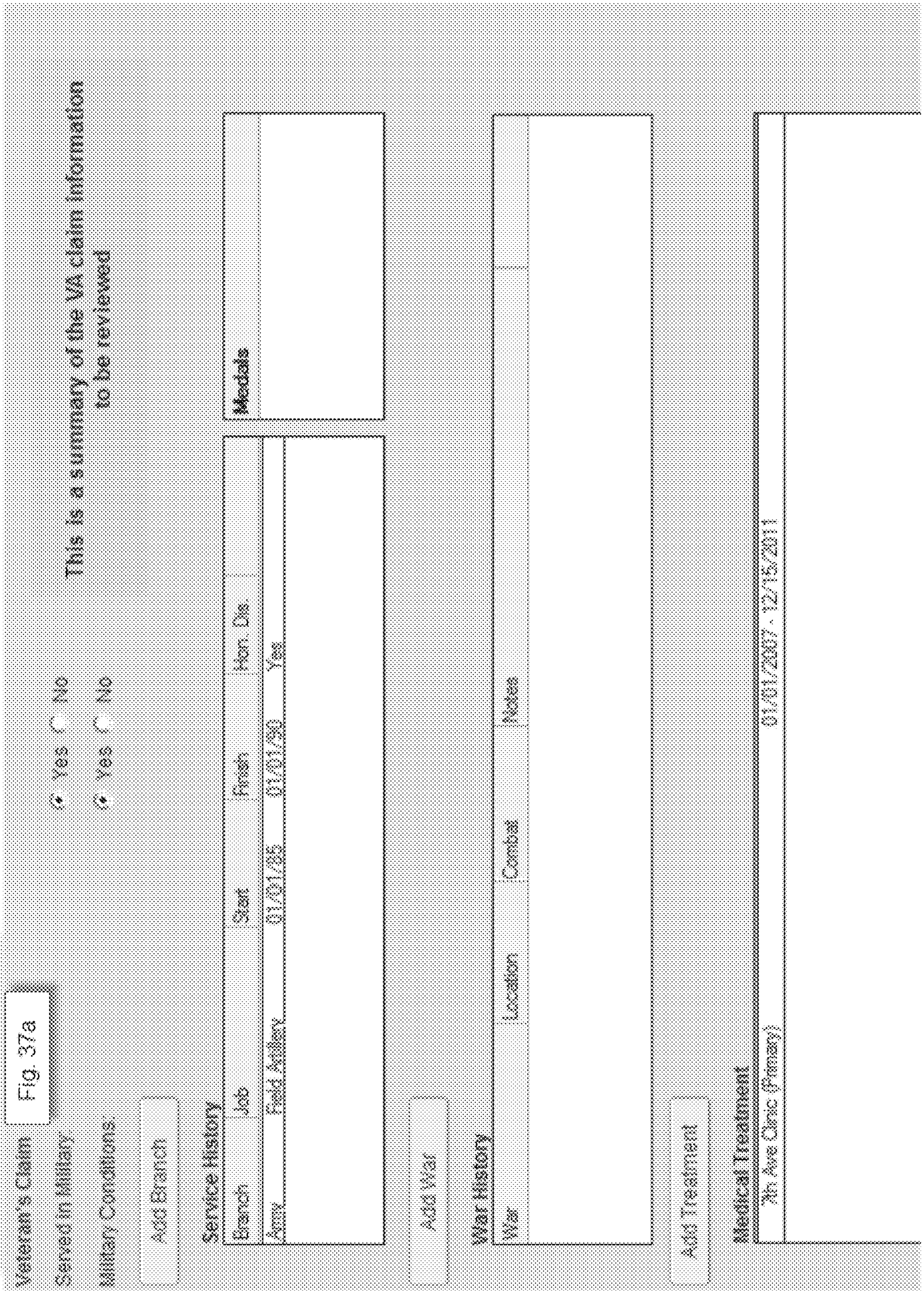

Veteran's Claim
Served in Military
Yes
No
Military Conditions
Yes
No
This is a summary of the VA claim information to be reviewed
Add Branch
Service History
Branch
Job
Start
Finish
Hon. Dis.
Medals
Army
Field Artillery
01/01/85
01/01/90
Yes
Add War
War History
War
Location
Combat
Notes
Add Treatment
Medical Treatment
7th Ave Clinic (Primary)
01/01/2007 - 12/15/2011

Fig. 37a

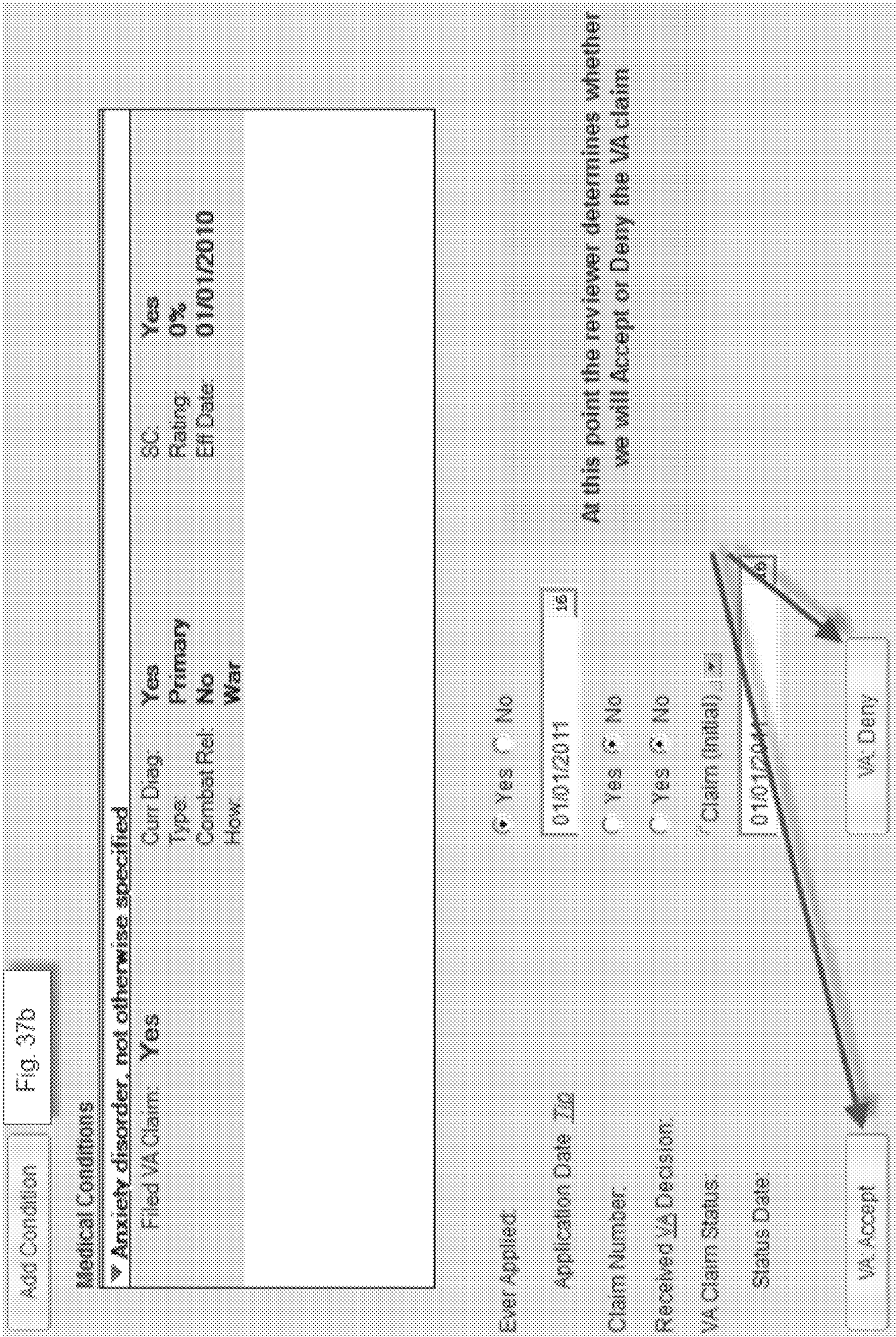
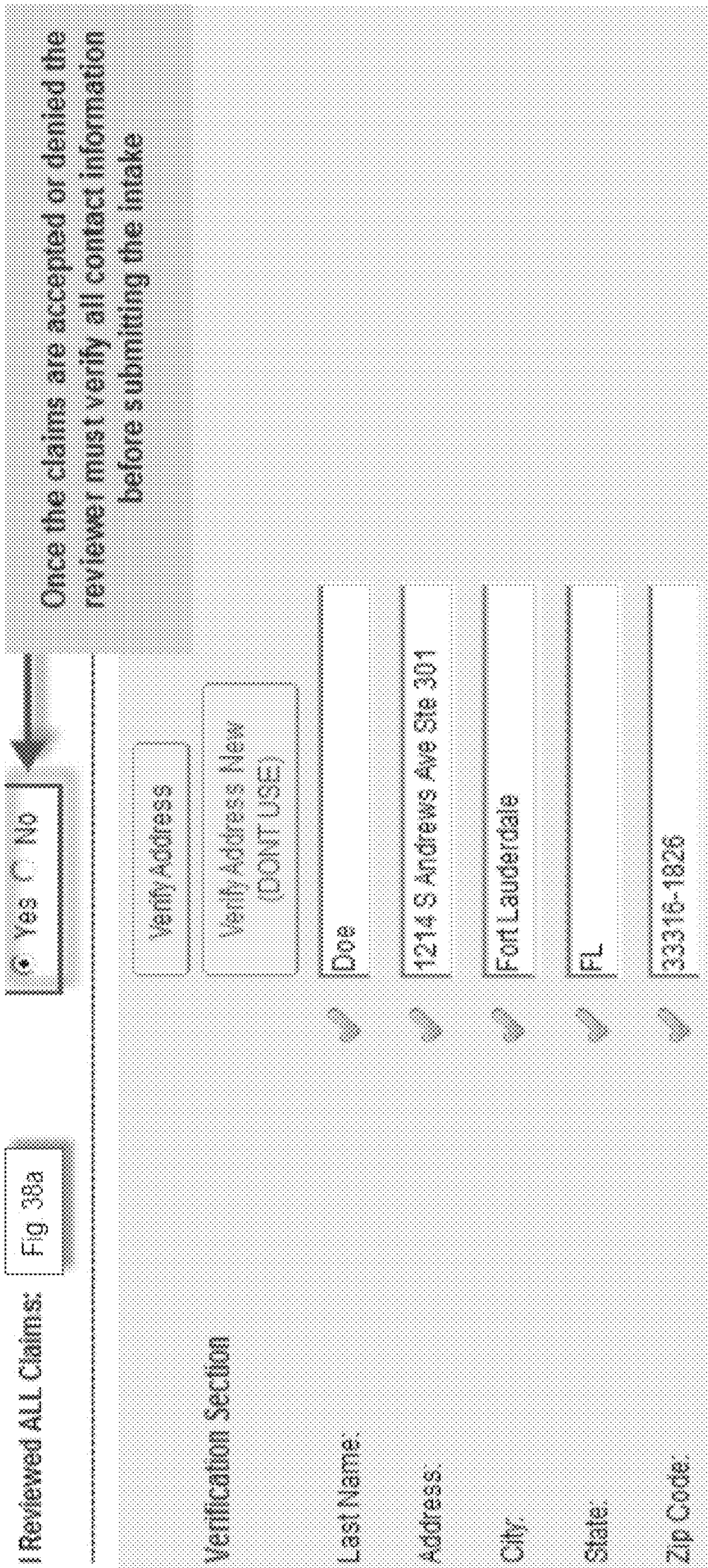

Add Condition
Medical Conditions
Anxiety disorder, not otherwise specified
Filed VA Claim: Yes
Curr Diag: Yes
Type: Primary
Combat Rel: No
How: War
SC: Yes
Rating: 0%
Eff Date: 01/01/2010
Ever Applied: Yes No
Application Date 01/01/2011
Claim Number: Yes No
Received VA Decision: Yes No
VA Claim Status: Claim (Initial)
Status Date
At this point the reviewer determines whether we will Accept or Deny the VA claim
VA Accept
VA Deny

Fig. 37b


I Reviewed ALL Claims:
Fig 38a
Yes No
Once the claims are accepted or denied the reviewer must verify all contact information before submitting the intake
Verification Section
Verify Address
Verify Address New (DONT USE)
Last Name:
Doe
Address:
1214 S Andrews Ave Ste 301
City:
Fort Lauderdale
State:
FL
Zip Code:
33316-1826

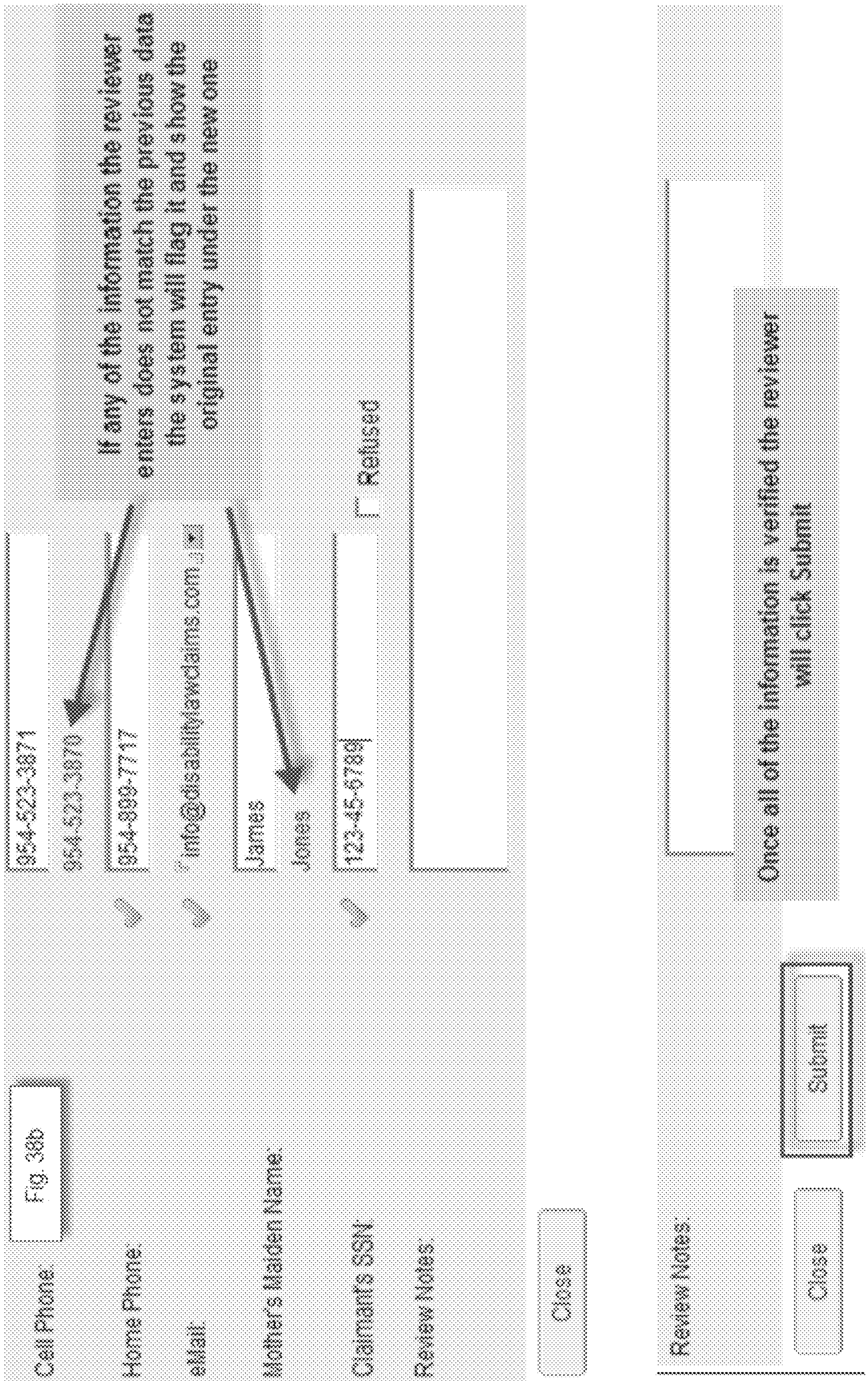


Fig. 38b
Cell Phone:
954-523-3871
954-523-3870
Home Phone:
954-899-7717
eMail:
info@disabilitylawclaims.com
Mother's Maiden Name:
James
Jones
Claimant's SSN:
123-45-6789
Refused
Review Notes:
Close
If any of the information the reviewer enters does not match the previous data the system will flag it and show the original entry under the new one
Once all of the information is verified the reviewer will click Submit
Submit
Review Notes:
Close

Import Wizard

Fig. 39

The Import Wizard allows the user to attach documents to individual client's files.

The following is an overview of the Import Window. All of the functions outlined below are the same in each Import view (Incoming Mail, Outgoing Mail, Collections, Medical Records, Pickups, and Work-flow Docuemtns

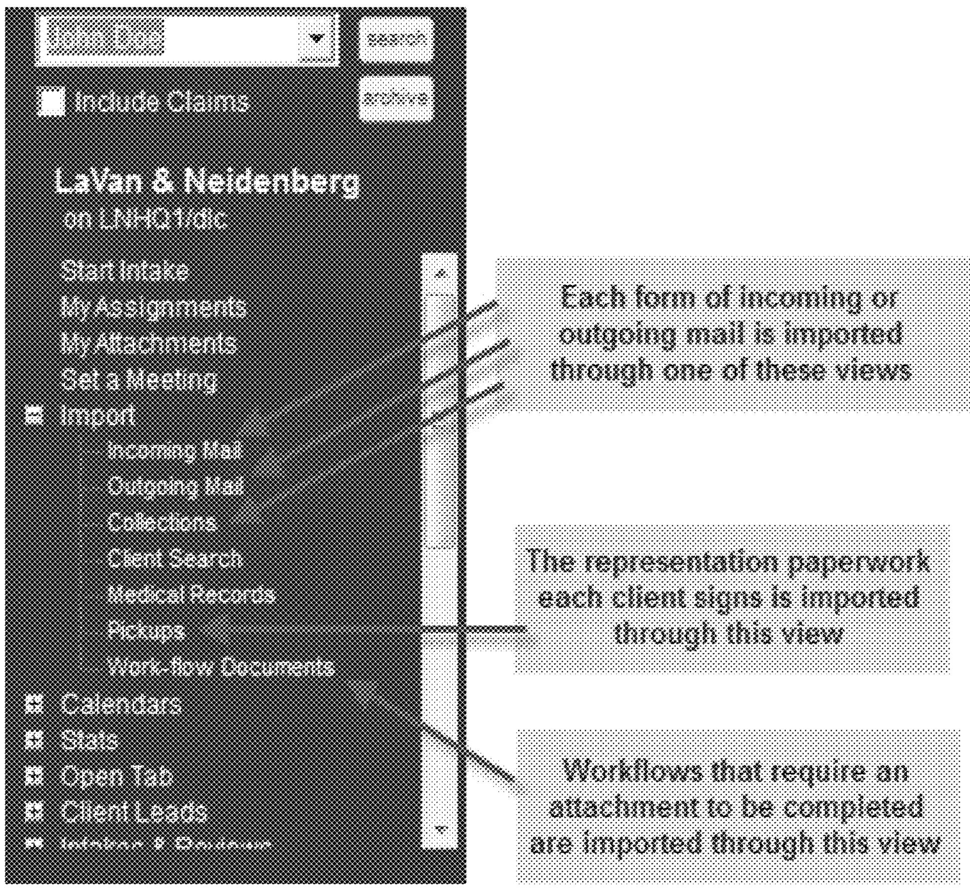
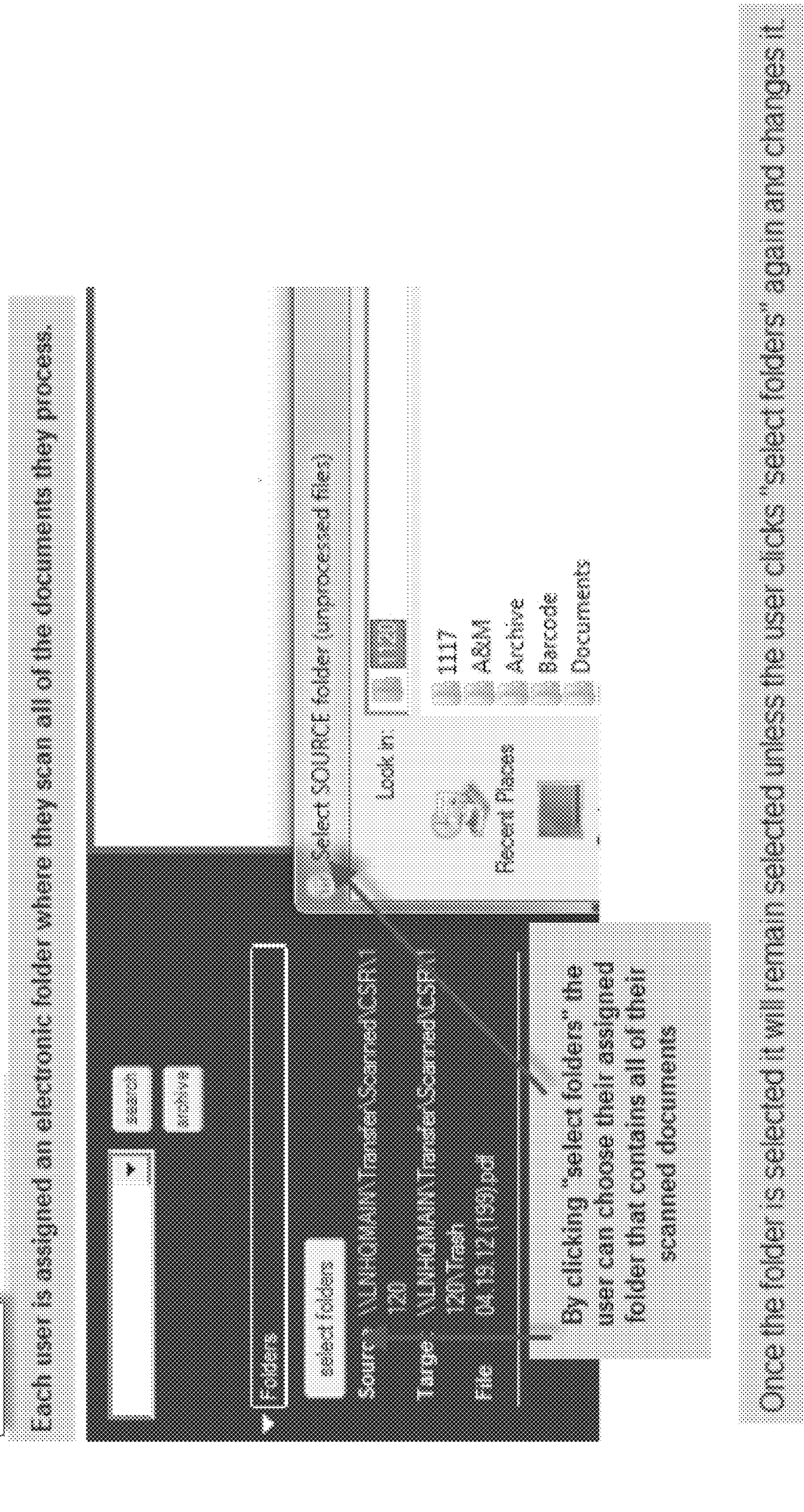


Fig. 40


Each user is assigned an electronic folder where they scan all of the documents they process.
Folders
select folders
Source \\LNHQMAIN\Transfer\Scanned\CSR\1 120
Target \\LNHQMAIN\Transfer\Scanned\CSR\1 120\Trash
File 04.19.12 (159).pdf
Select SOURCE folder (unprocessed files)
Look in:
Recent Places
1117
A&M
Archive
Barcode
Documents
By clicking "select folders" the user can choose their assigned folder that contains all of their scanned documents
Once the folder is selected it will remain selected unless the user clicks "select folders" again and changes it

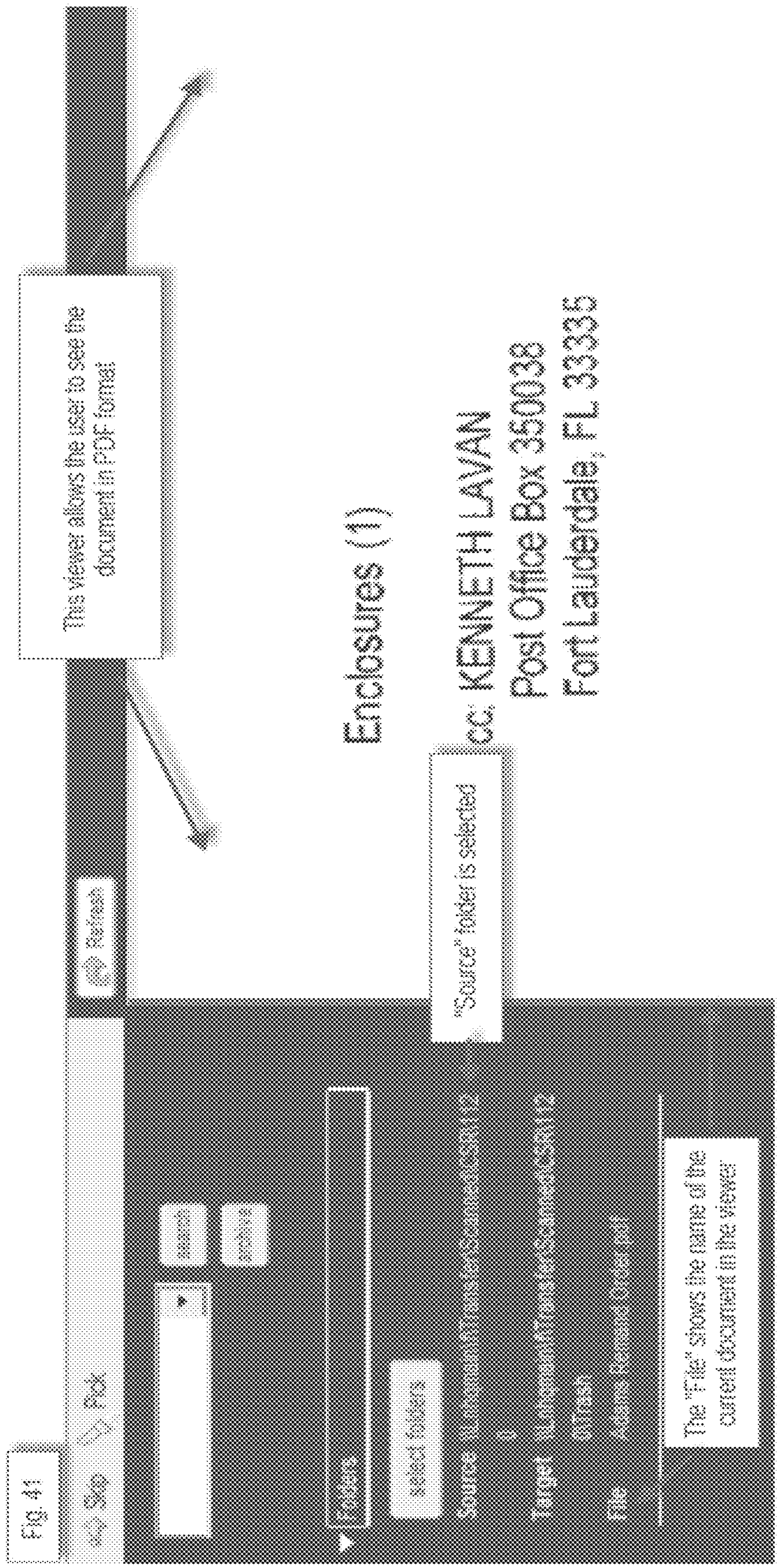

Skip
Pick
Refresh
This viewer allows the user to see the document in PDF format
Enclosures (1)
cc: KENNETH LAVAN
Post Office Box 350038
Fort Lauderdale, FL 33335
"Source" folder is selected
Folders
select folders
Source
Target
File
The "File" shows the name of the current document in the viewer

Fig. 41

Fig. 42

User selects the appropriate client that they want to assign the document to by using the search bar. Once the client is selected information from their claim will appear in the import window as shown below:

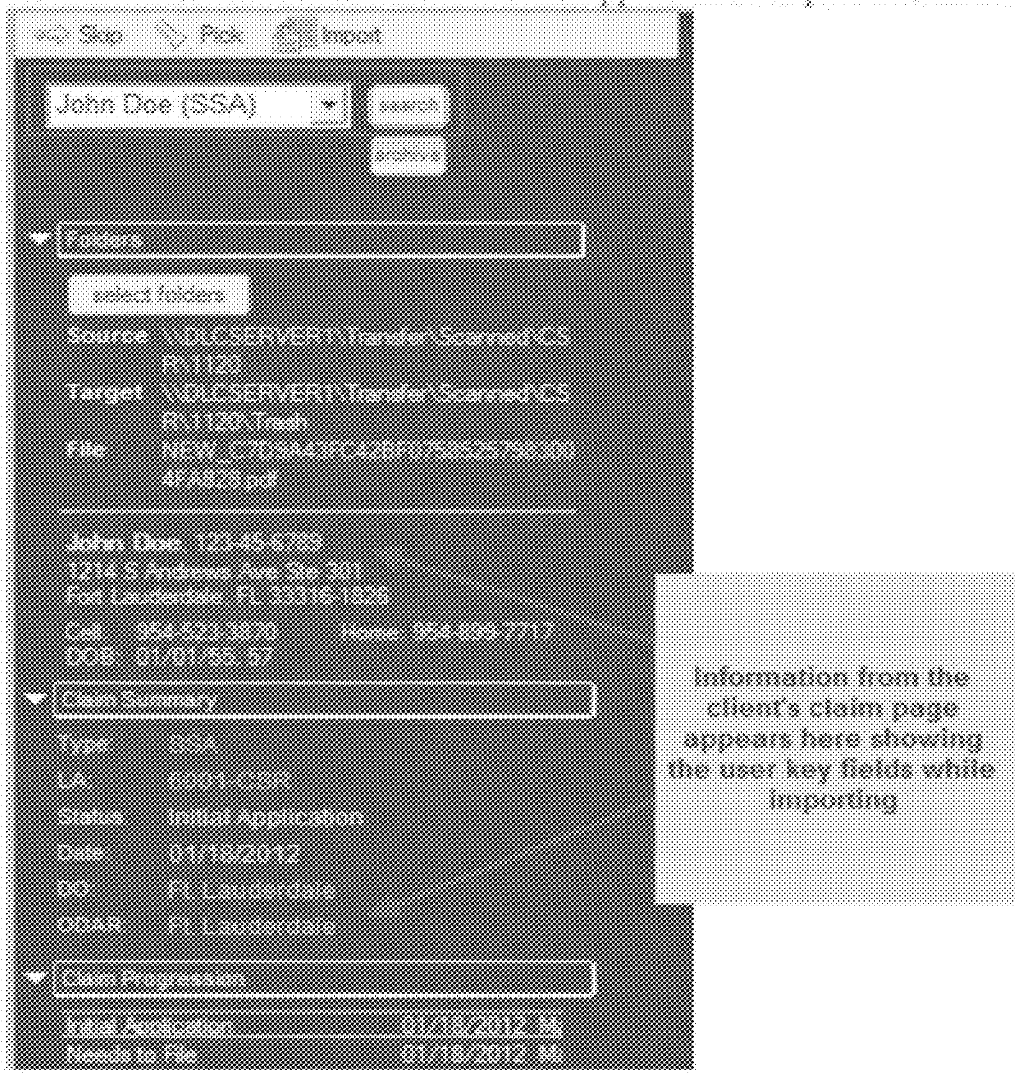


Fig. 43

The button "Pick" allows the user to select a certain document from all documents in the folder:

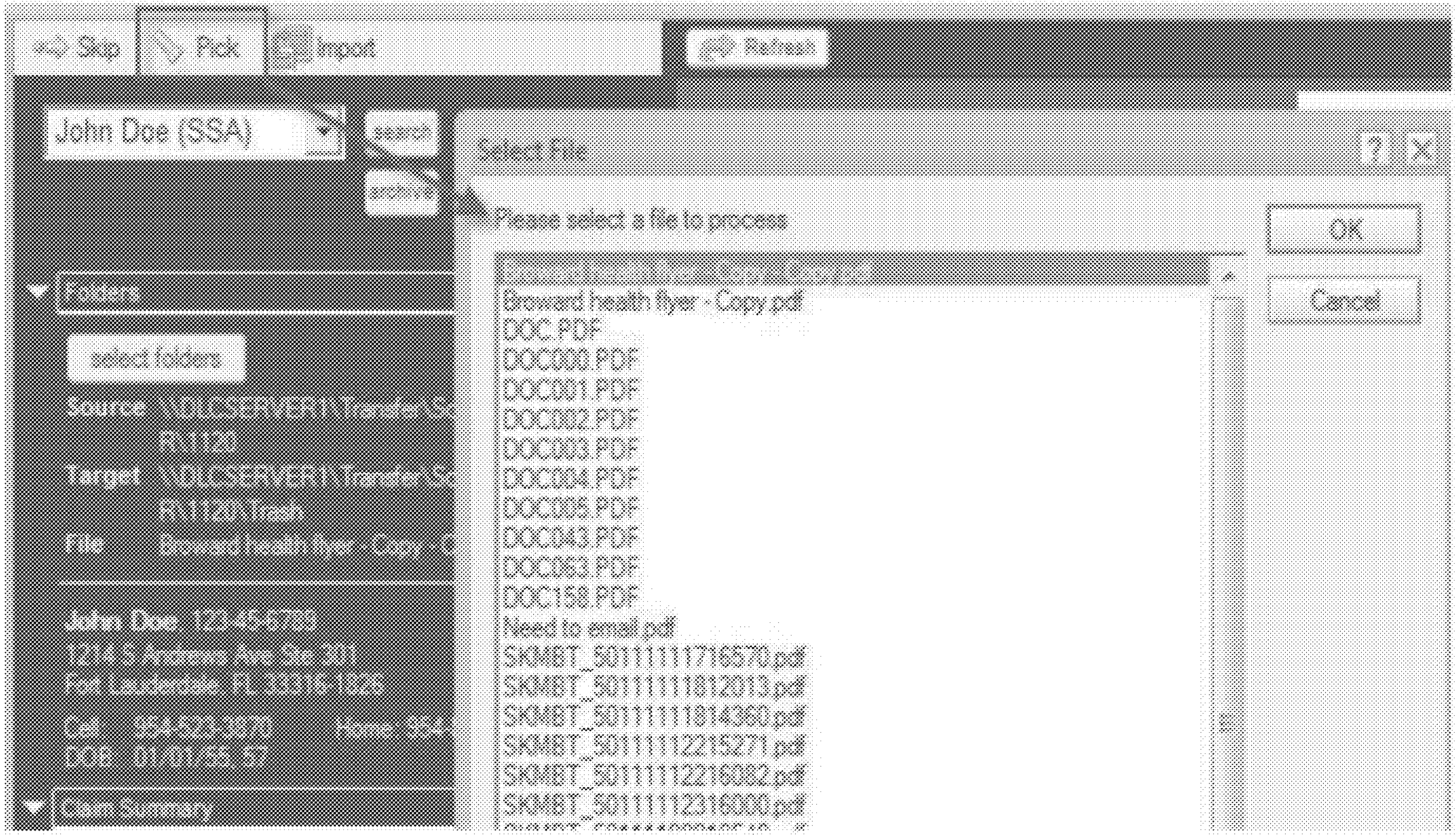


Fig. 44

The button "Skip" allows the user to skip the current document.

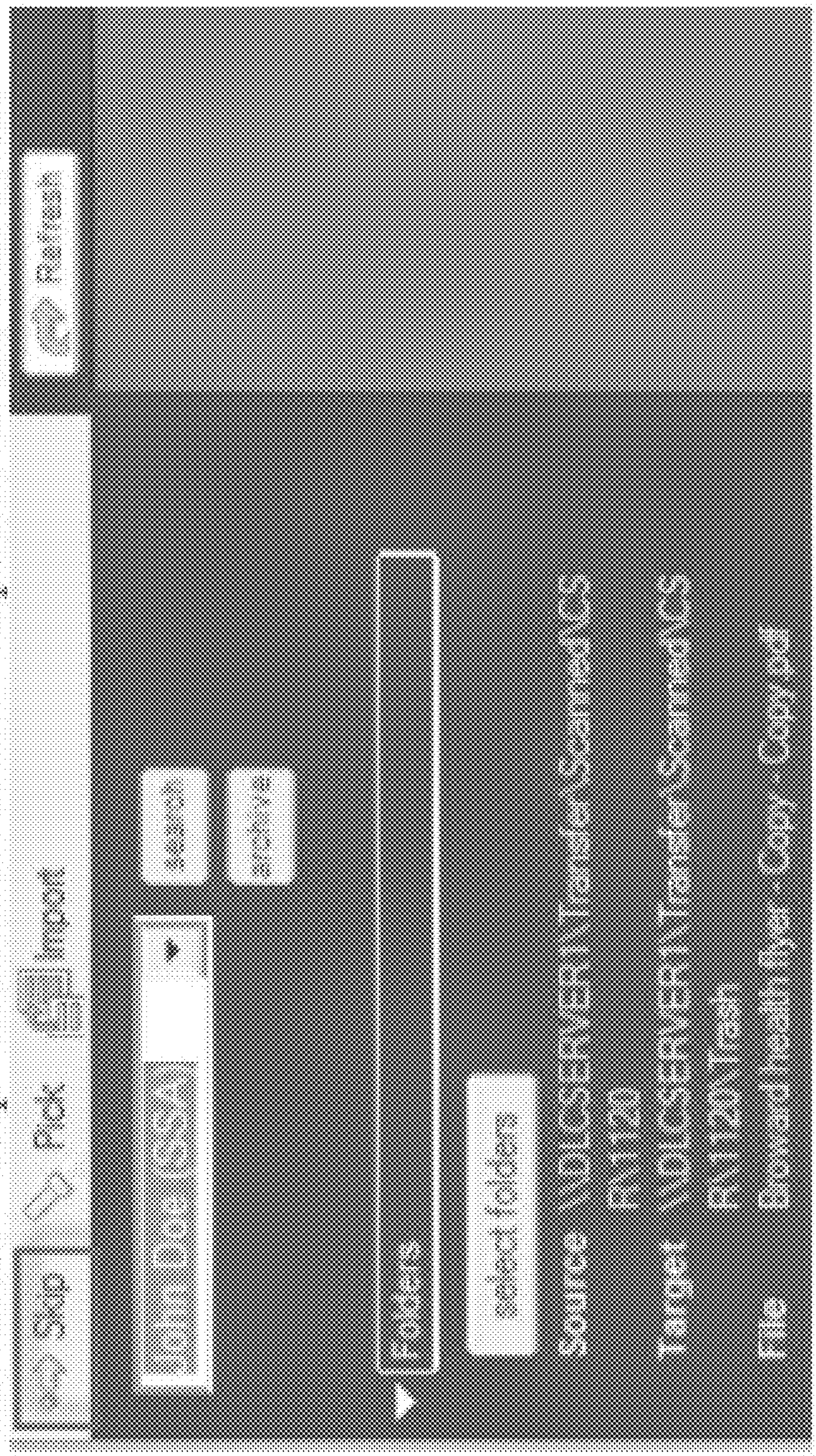


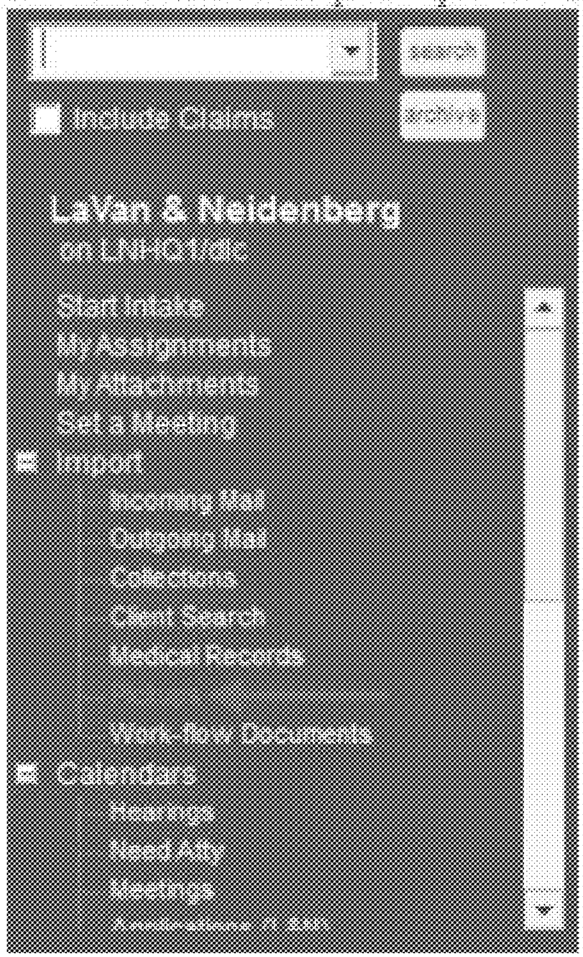
Fig. 45

The button "Import" opens the import window for the user to classify the document.

Pickups Fig. 46

The "Pickups" Import Wizard is used to import the initial representation paperwork signed by a client.

To access the "Pickups" Import Wizard the user would select "Pickups" under Import



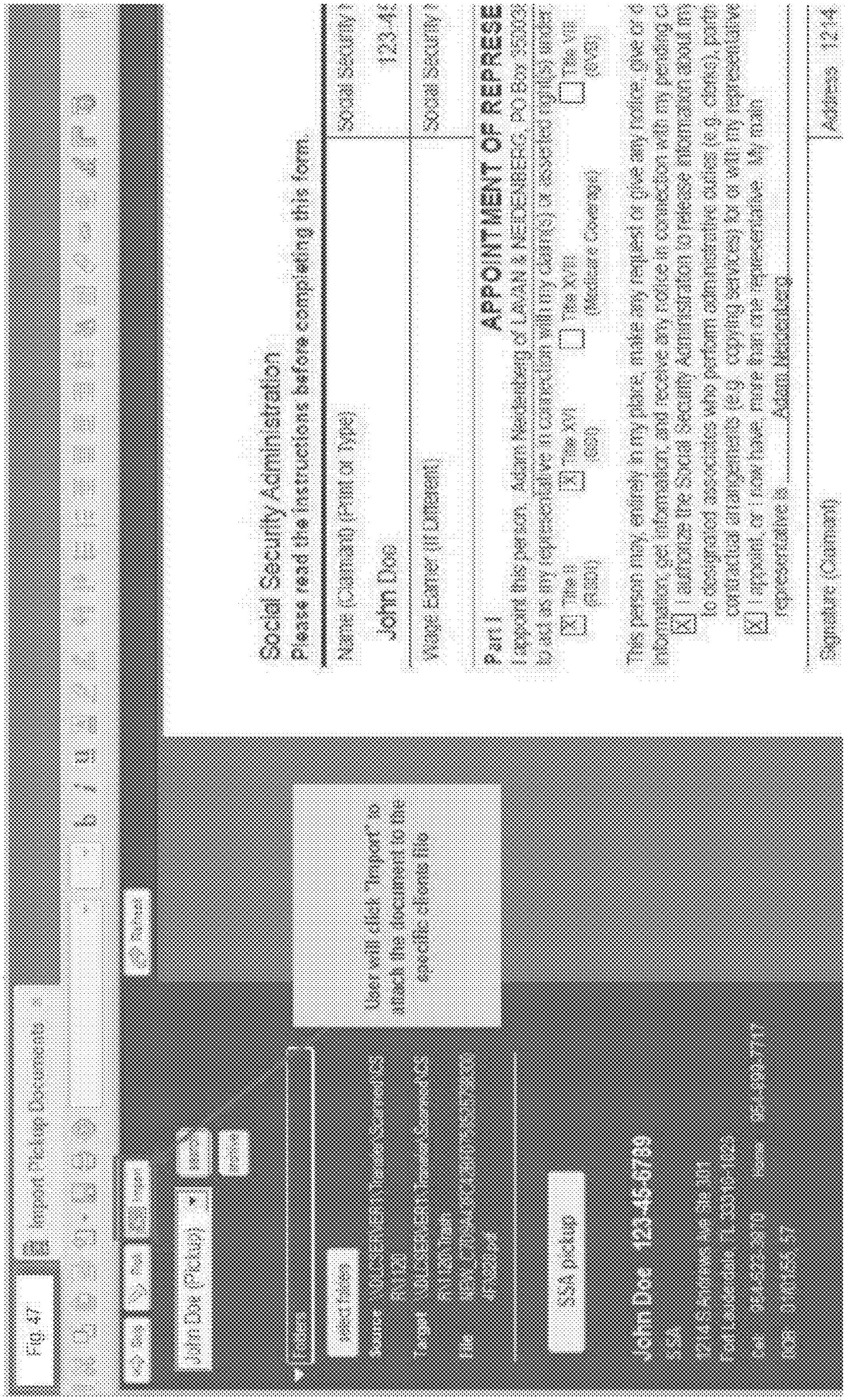


Fig. 47
Social Security Administration
Please read the instructions before completing this form.
John Doe
APPOINTMENT OF REPRESE
John Doe 123-45-6789
SSA pickup
User will click "Import" to attach the document to the specific clients file

Fig. 48

After clicking "Import" this dialog will appear showing the 3 different categories the signed paperwork will go into

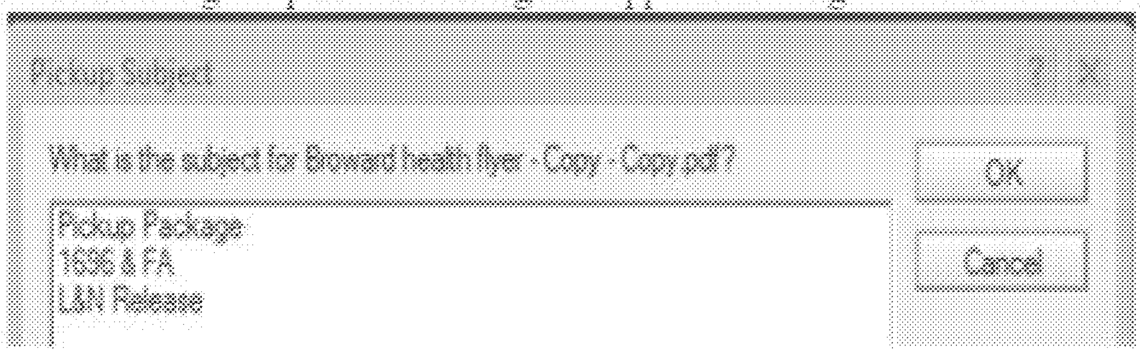
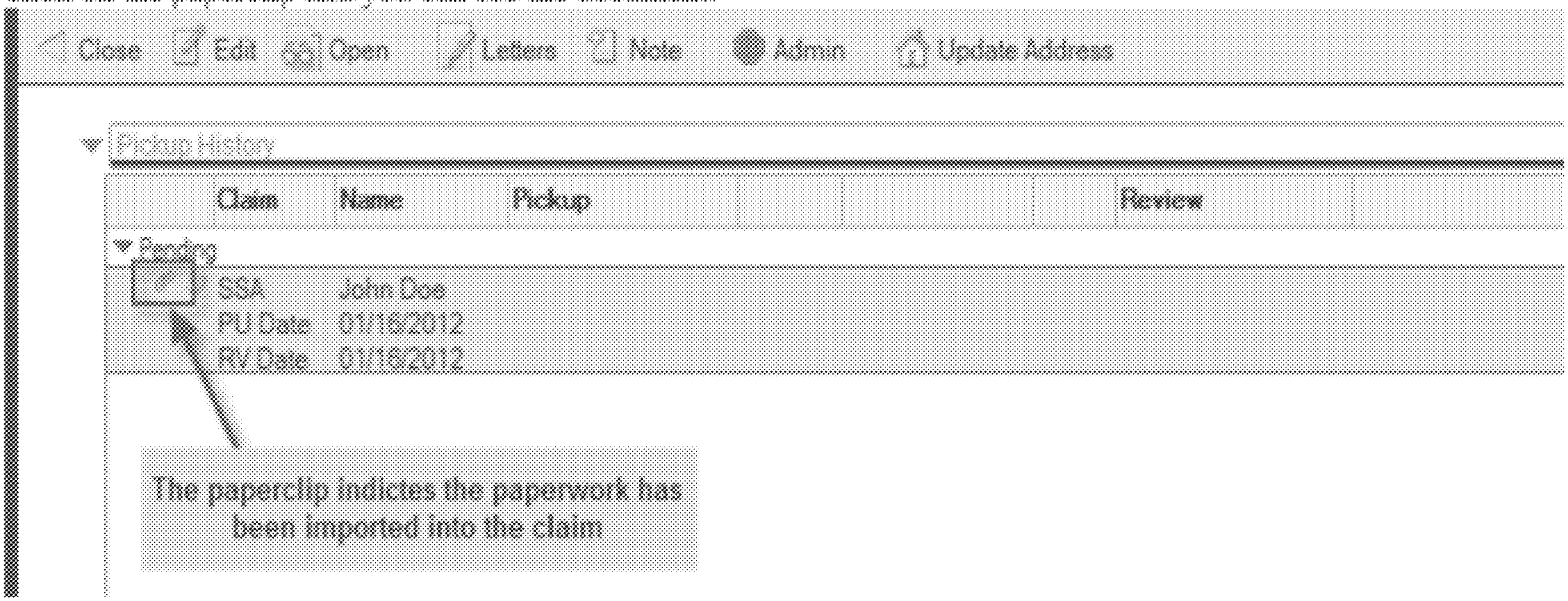


Fig 49

After one of the sections is imported it's indicated on the import window as shown below. To complete a "Pickup" import all 3 categories in the dialogue above should appear under "Imported Subjects"

Fig. 50

This print screen shows the clients claim page after the documents have been imported – All you have to do is right click on the paperclip and you can see the document.



Incoming Mail

Fig 51

To access the "Incoming Mail" Import Wizard the user selects Import > "Incoming Mail"

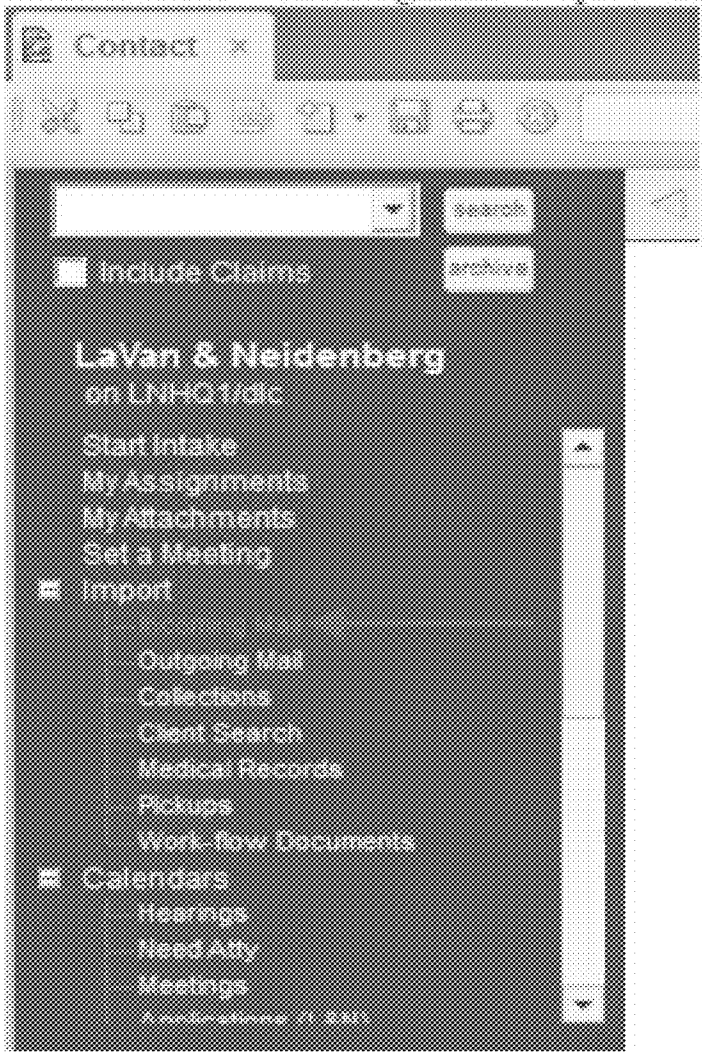


Fig. 52

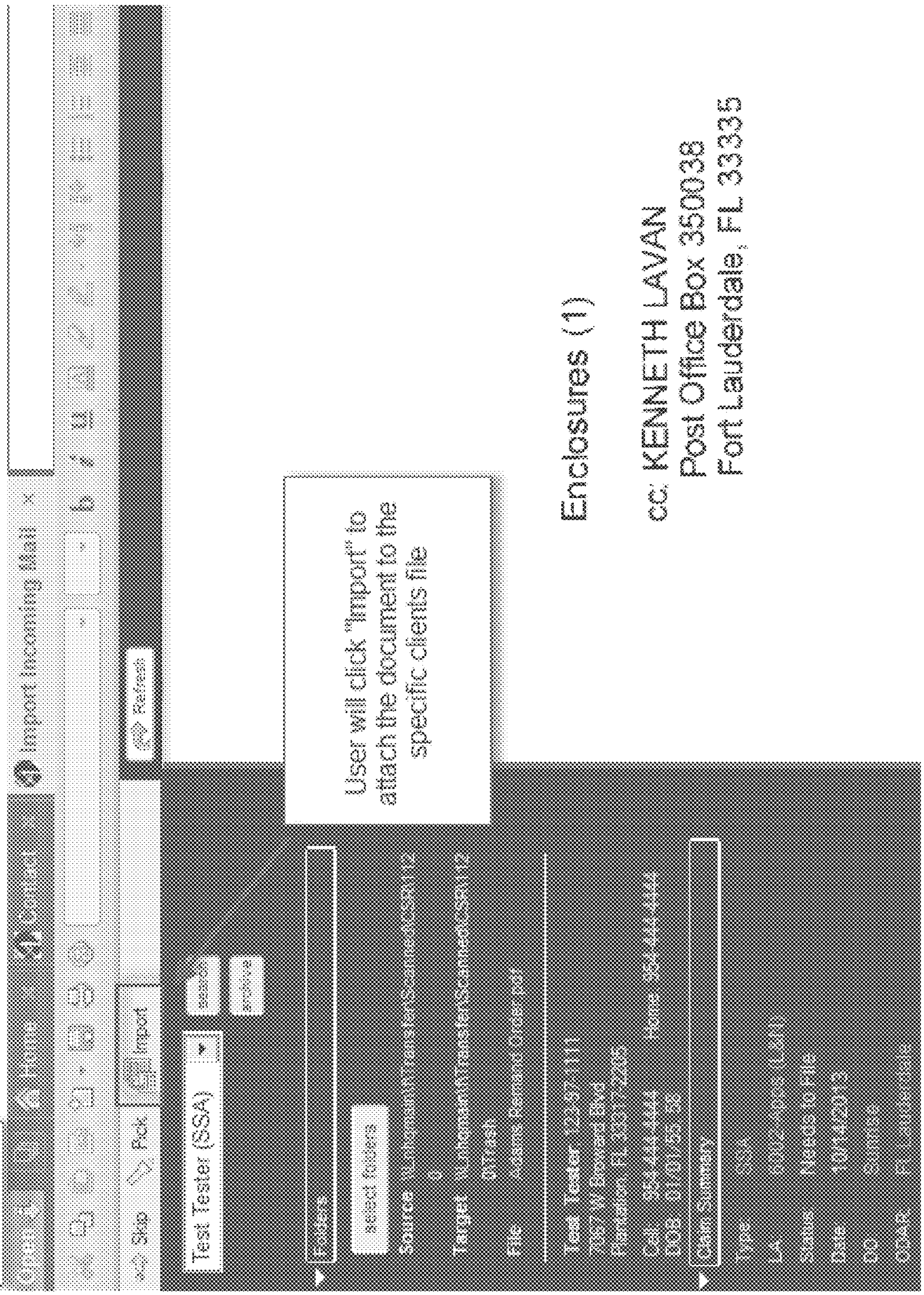

Import Incoming Mail
Refresh
Import
Skip
Pick
Test Tester (SSA)
Folders
select folders
Source
Target
File
Adams Remand Order.pdf
Claim Summary
User will click "Import" to attach the document to the specific clients file
Enclosures (1)
cc: KENNETH LAVAN
Post Office Box 350038
Fort Lauderdale, FL 33335

Fig 53

After clicking "Import" the following dialogue appears.

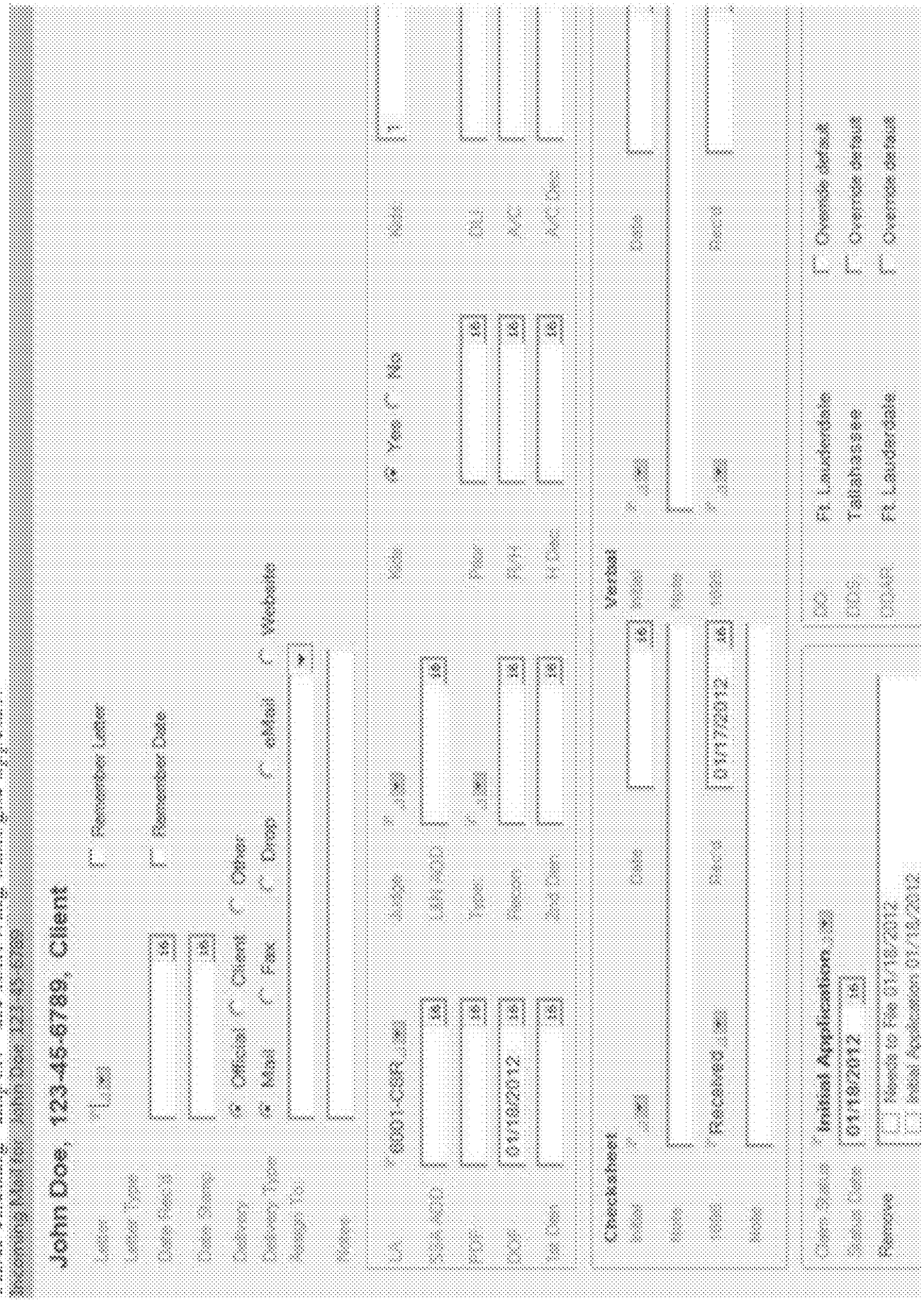


Fig. 54

<u>Section 1</u> – User will select the mailLetterIn description for what they are importing and complete the date fields.

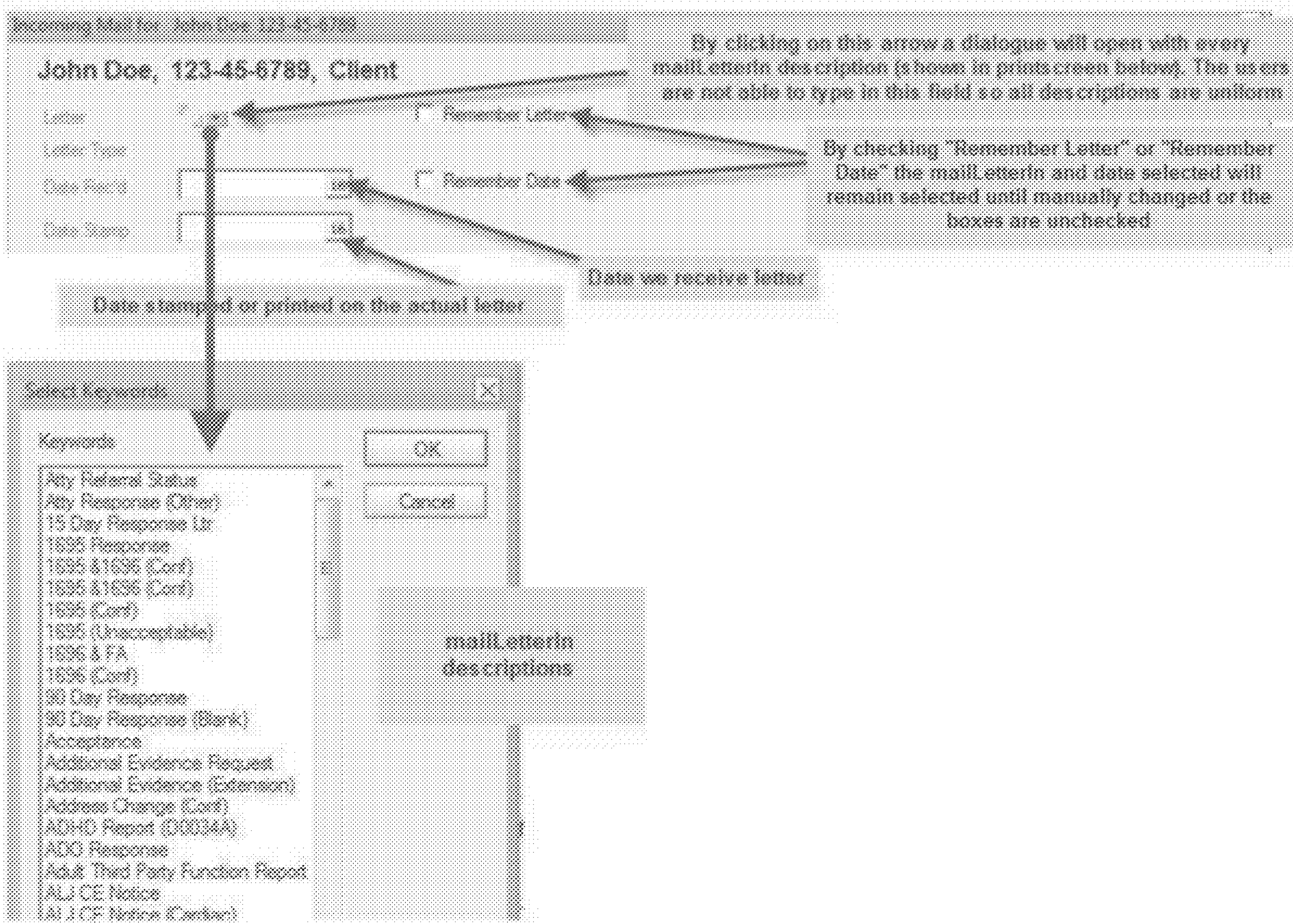


Fig. 55a

Section 3: User can assign the document to another user (if necessary) and also add notes if needed

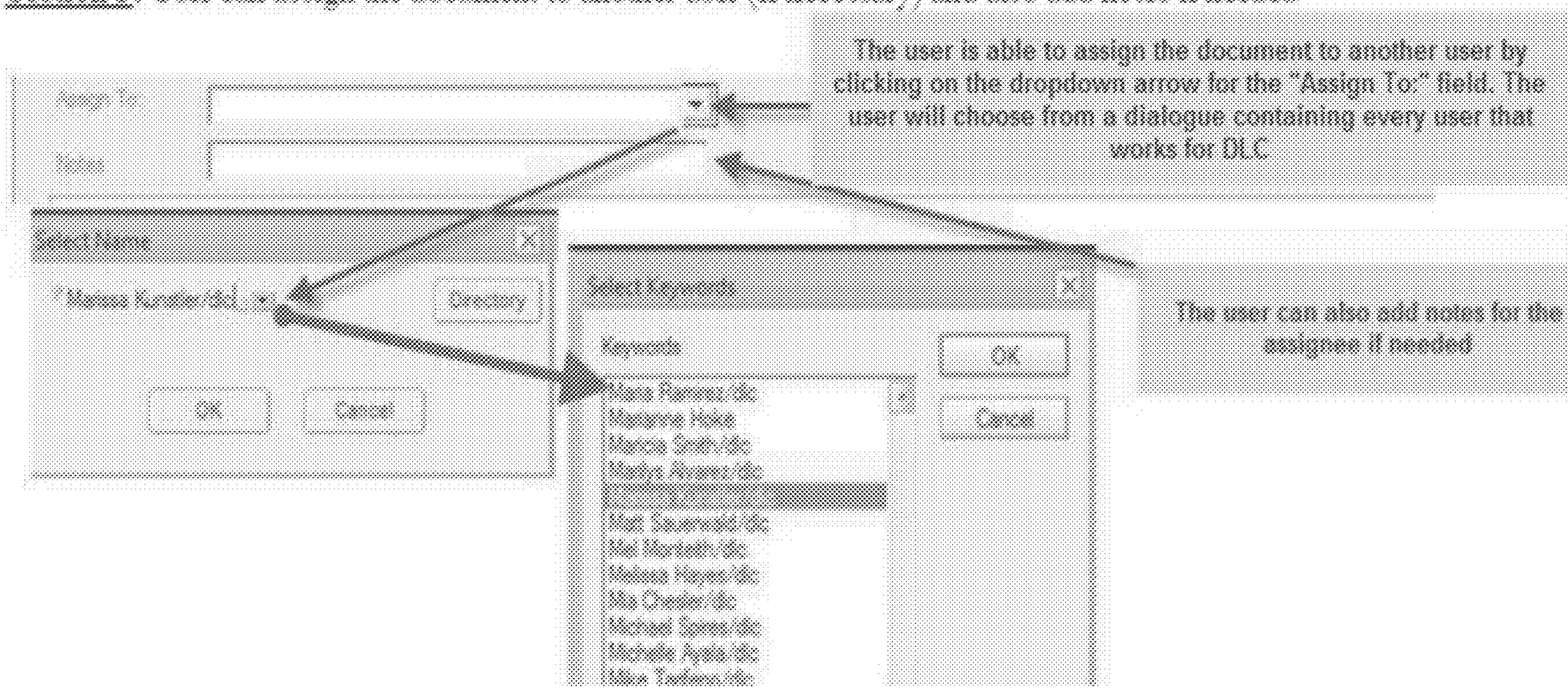


Fig. 55b

__Section 4:__ Each of the fields in this section appear on the clients claim page. If the fields are updated, once the user clicks "Save" the document will attach to the clients claim and any fields that were edited will be reflected on the clients claim.

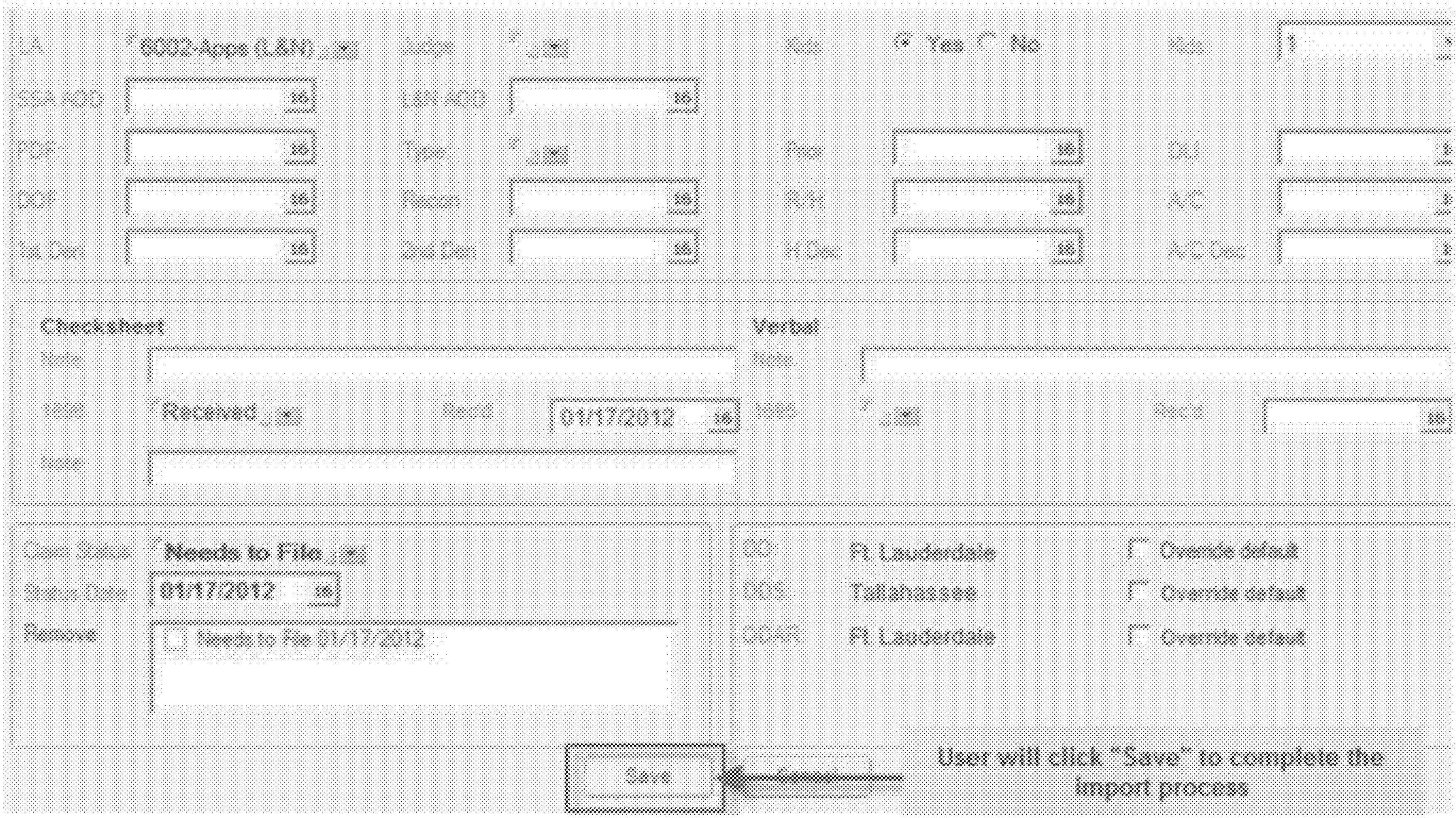
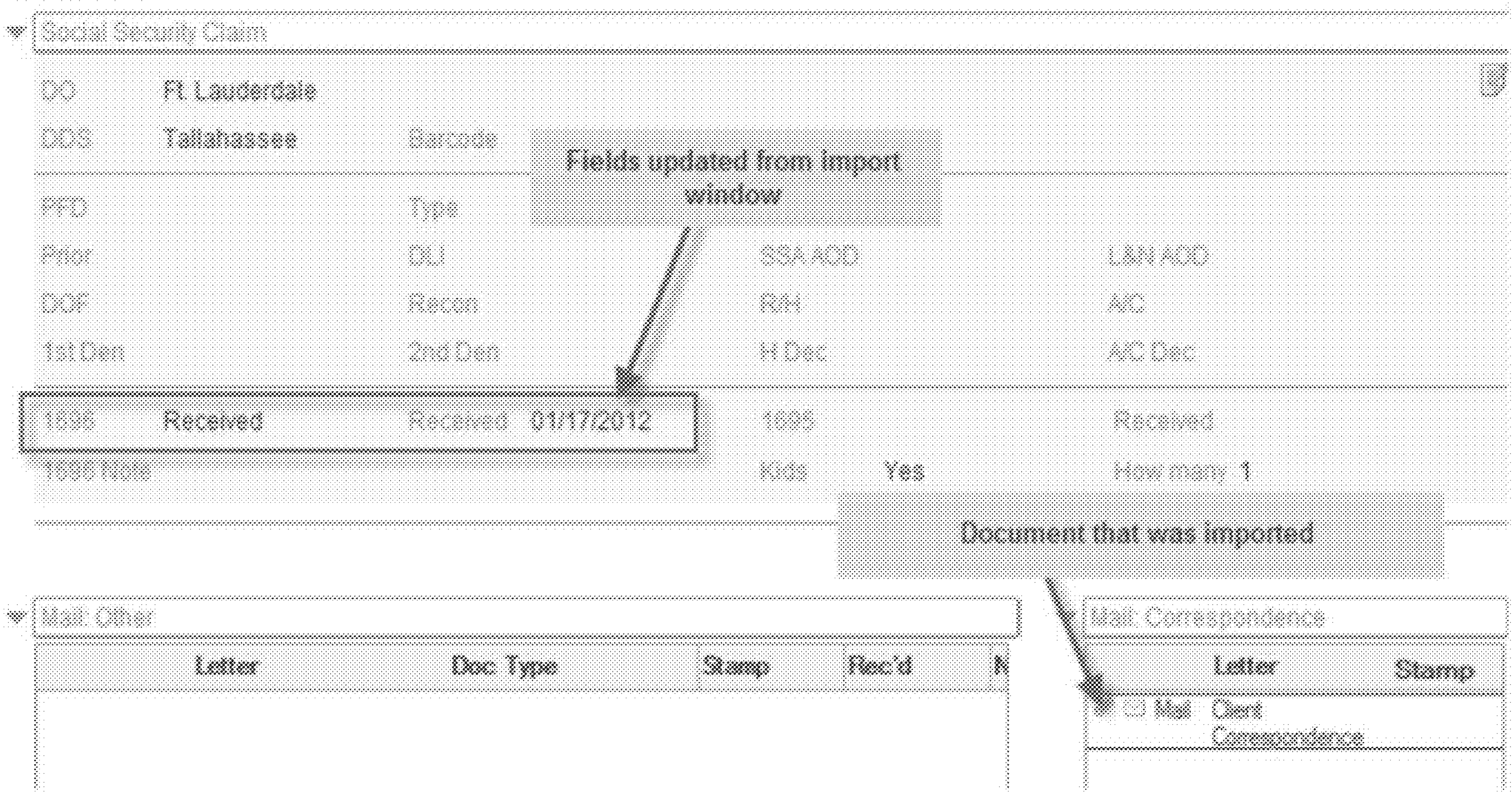


Fig. 56

This print screen shows the clients claim page after the import window was saved and document was attached to the clients file:



Outgoing Mail

Fig. 57

To access the "Outgoing Mail" Import Wizard the user selects Import > "Outgoing Mail"

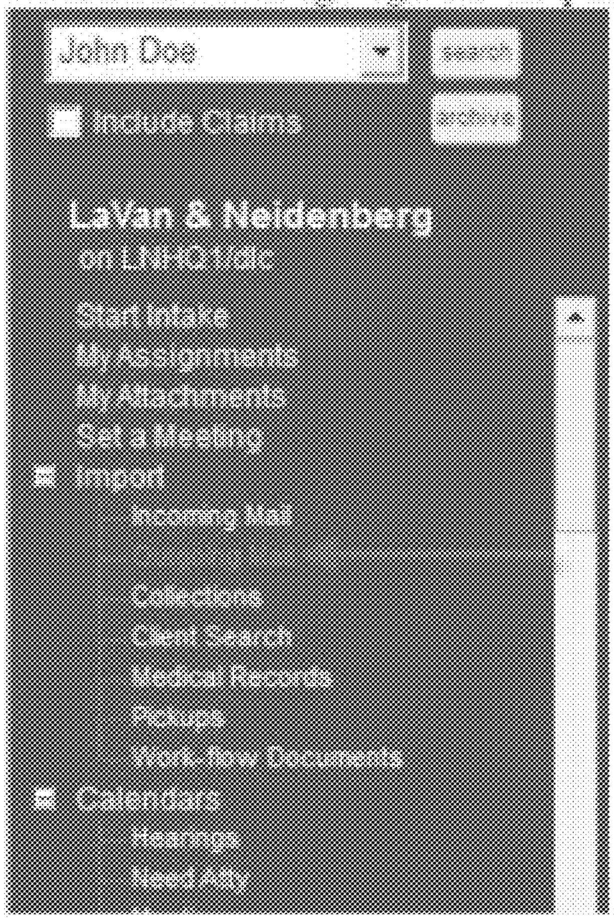


Fig. 58

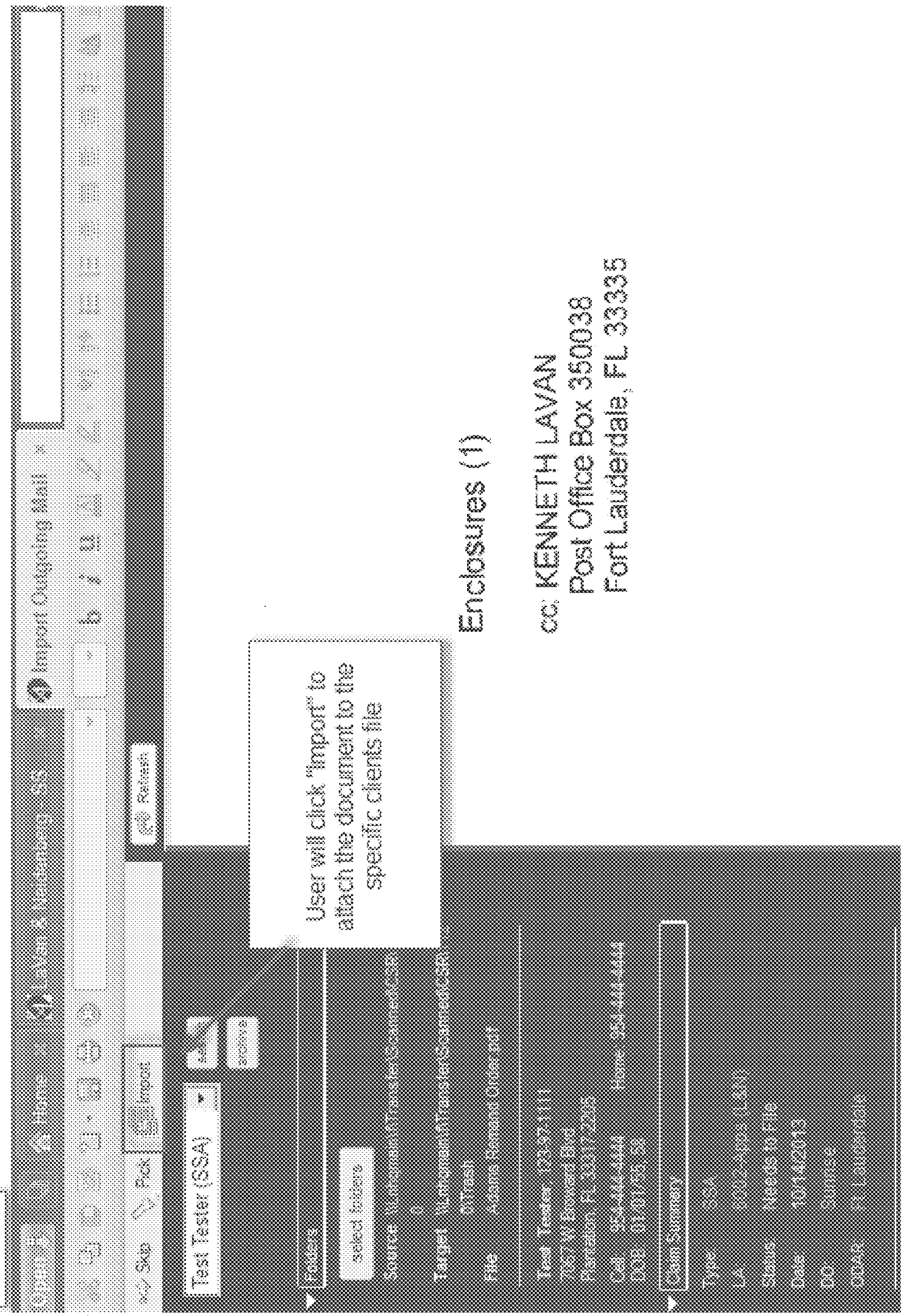

Import Outgoing Mail
Home
Skip
Pick
Import
Refresh
Test Tester (SSA)
Folders
select folders
User will click "Import" to attach the document to the specific clients file
Enclosures (1)
cc: KENNETH LAVAN
Post Office Box 350038
Fort Lauderdale, FL 33335
Claim Summary

Fig. 59

After clicking "Import" this dialogue will appear:

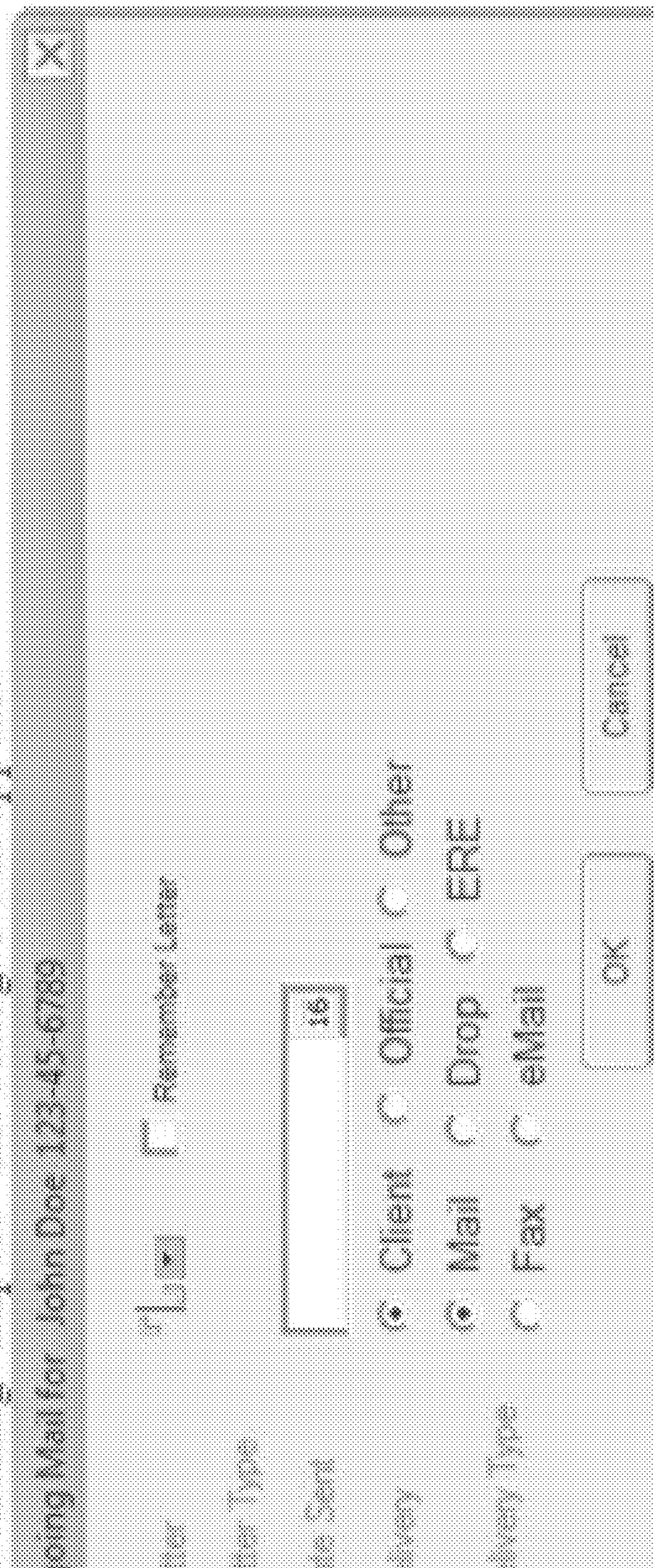


Fig. 60

The following print screens will breakdown the dialogue explaining it in 2 sections:

Section 1: User will select the mailLetter description for what they are importing and complete the date field:

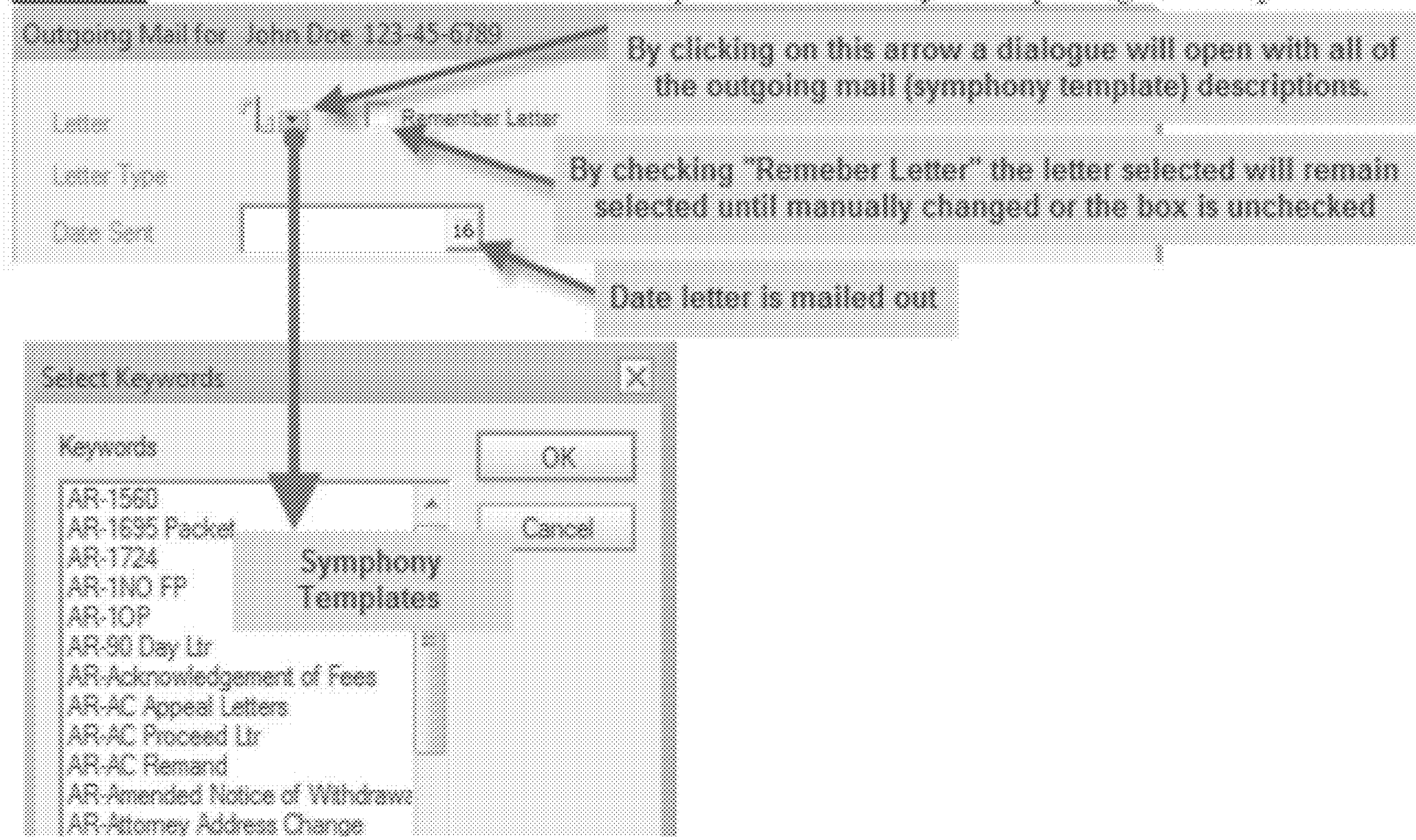
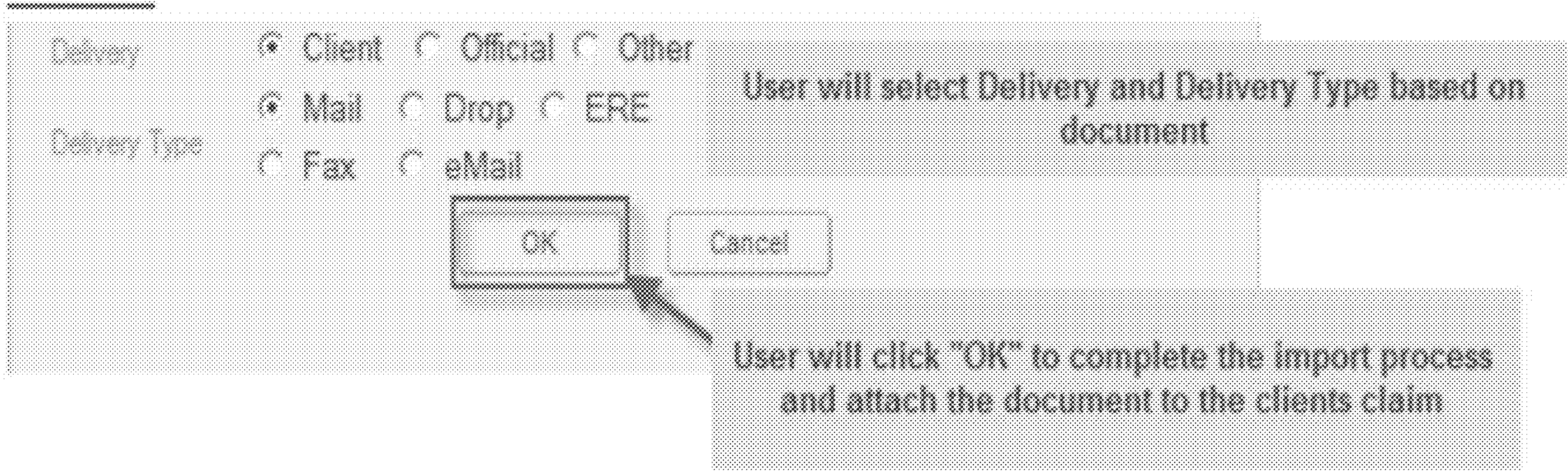


Fig 61

Section 2: User will select the method in which the document was delivered and who it was delivered to



Workflow Documents

Several work-flows have been created to require a document to be attached to EZ Claim as part of the work-flow.

For example: the work-flow, LA > Application (Draft) requires the user to attach the Application Packet

Fig. 62

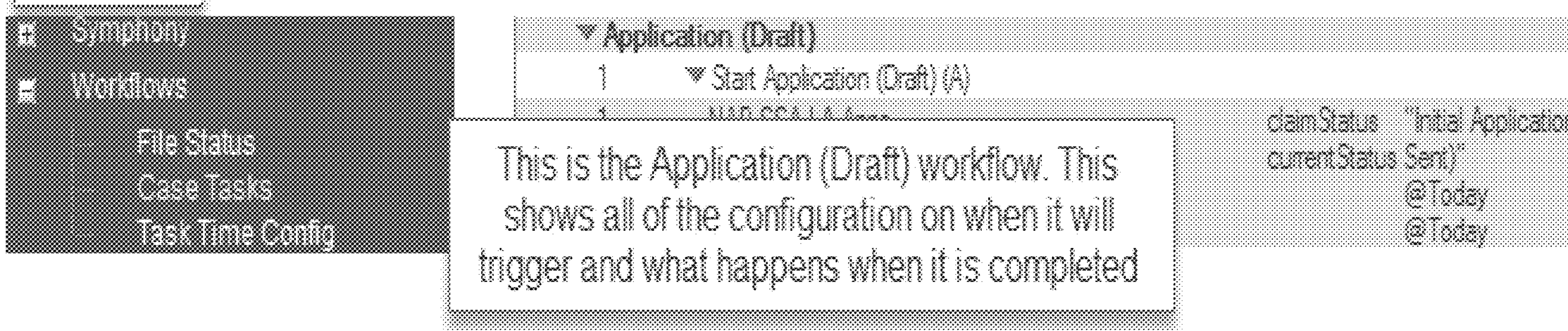


Fig. 63

To access the "Work-flow Documents" Import Wizard the user selects Import > "Work-flow Documents"

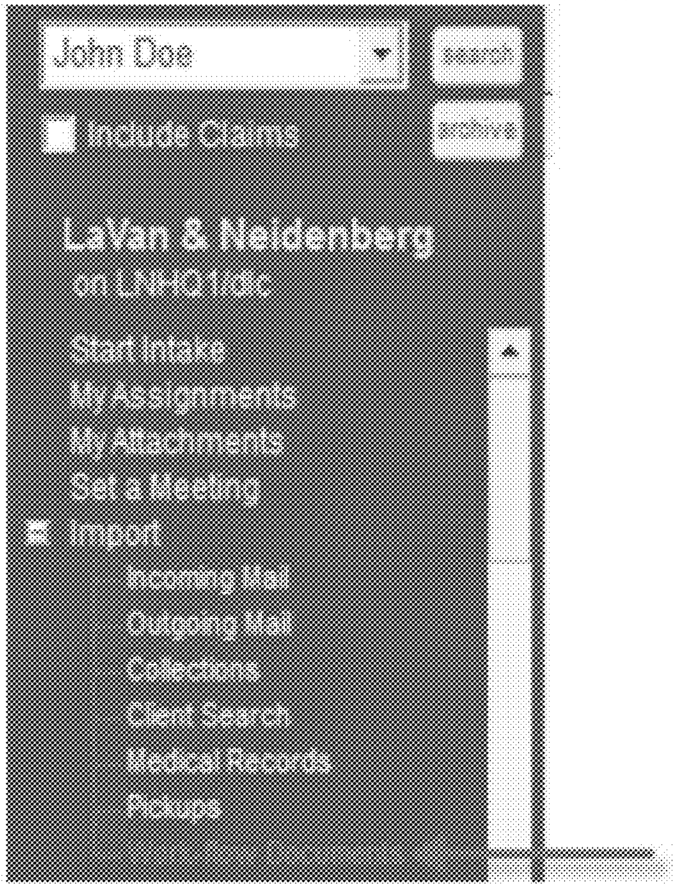


Fig. 64

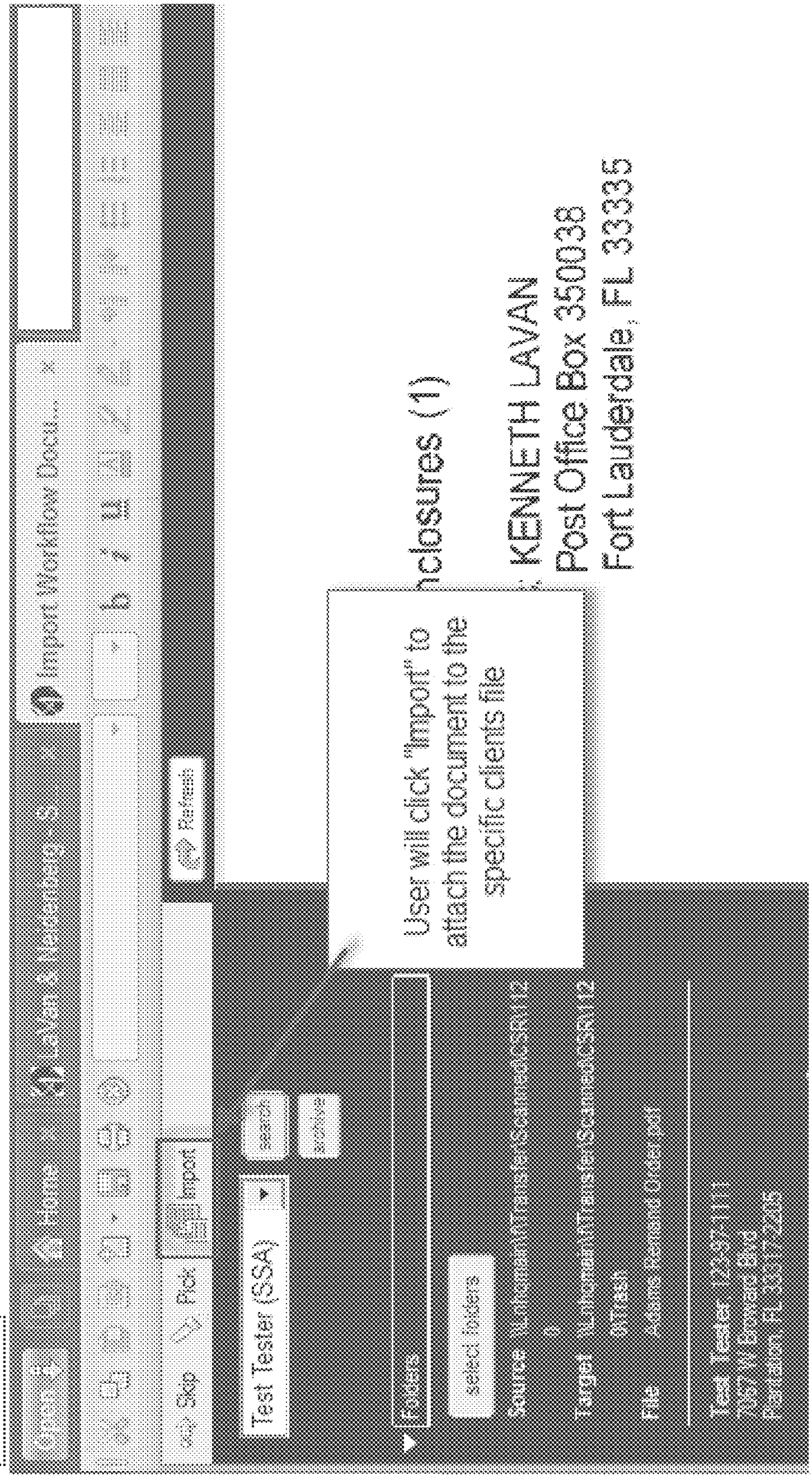

Import Workflow Docu...
Skip
Pick
Import
Refresh
Test Tester (SSA)
Folders
select folders
Source
Target
File
User will click "Import" to attach the document to the specific clients file
nclosures (1)
KENNETH LAVAN
Post Office Box 350038
Fort Lauderdale, FL 33335

Fig. 65

When the user clicks the "Import" button this dialogue will appear. Claims can have multiple workflows pending at one time so this dialogue ensures the user is completing the correct one.

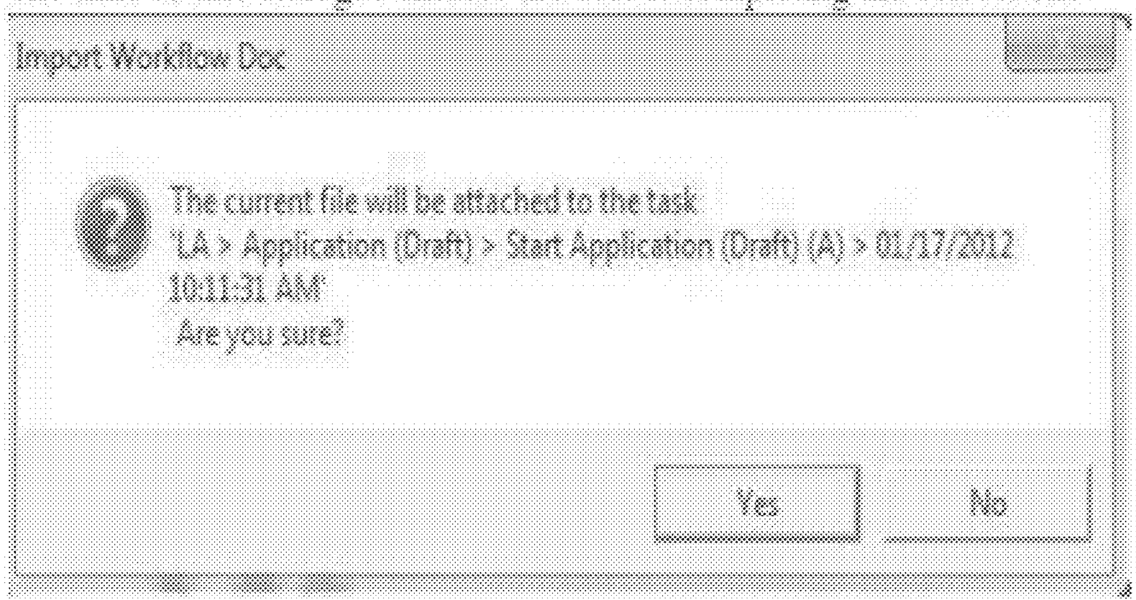


Fig 66

The user needs to verify that work-flow they are completing is on the correct step, which is the import step:

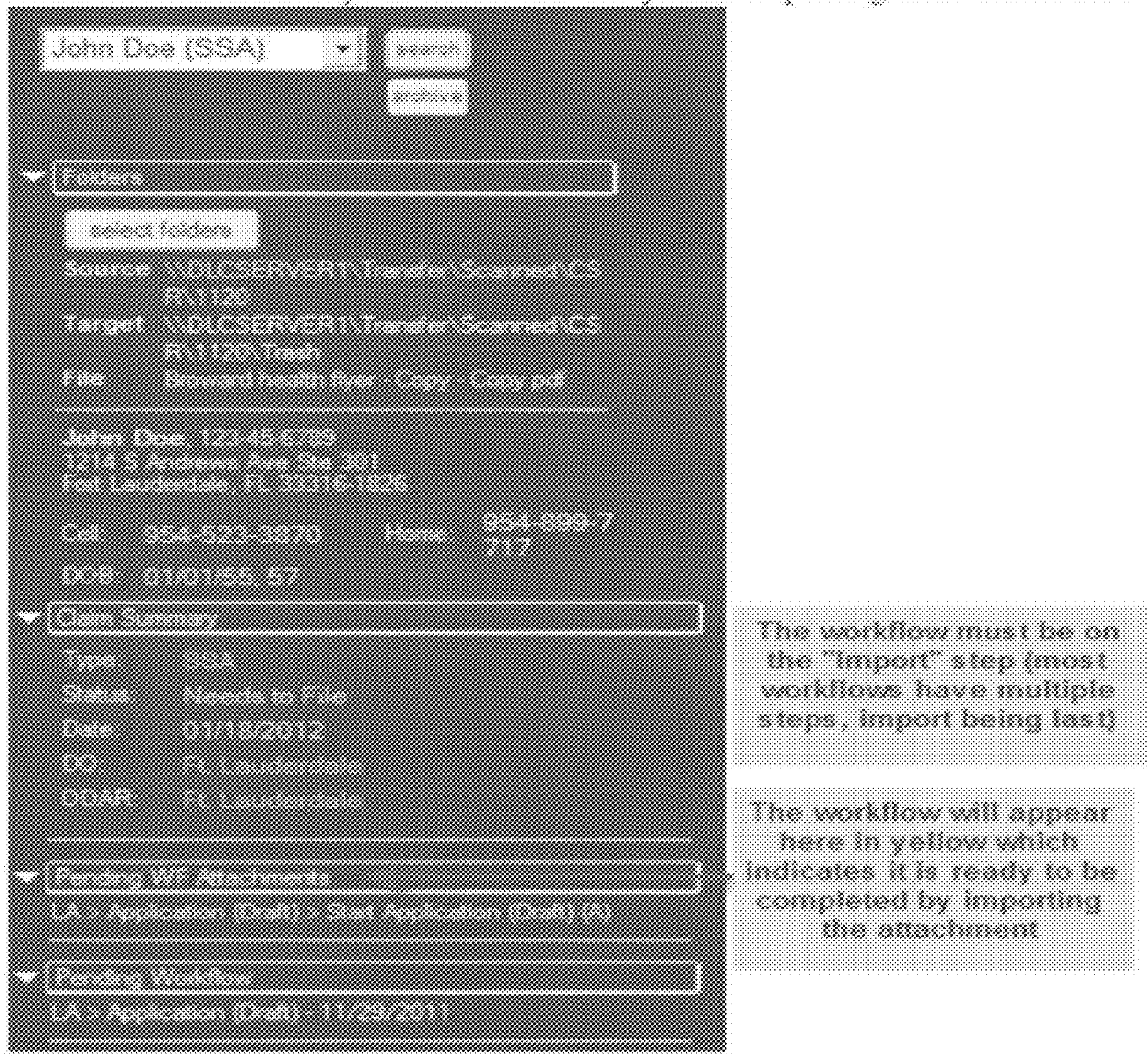
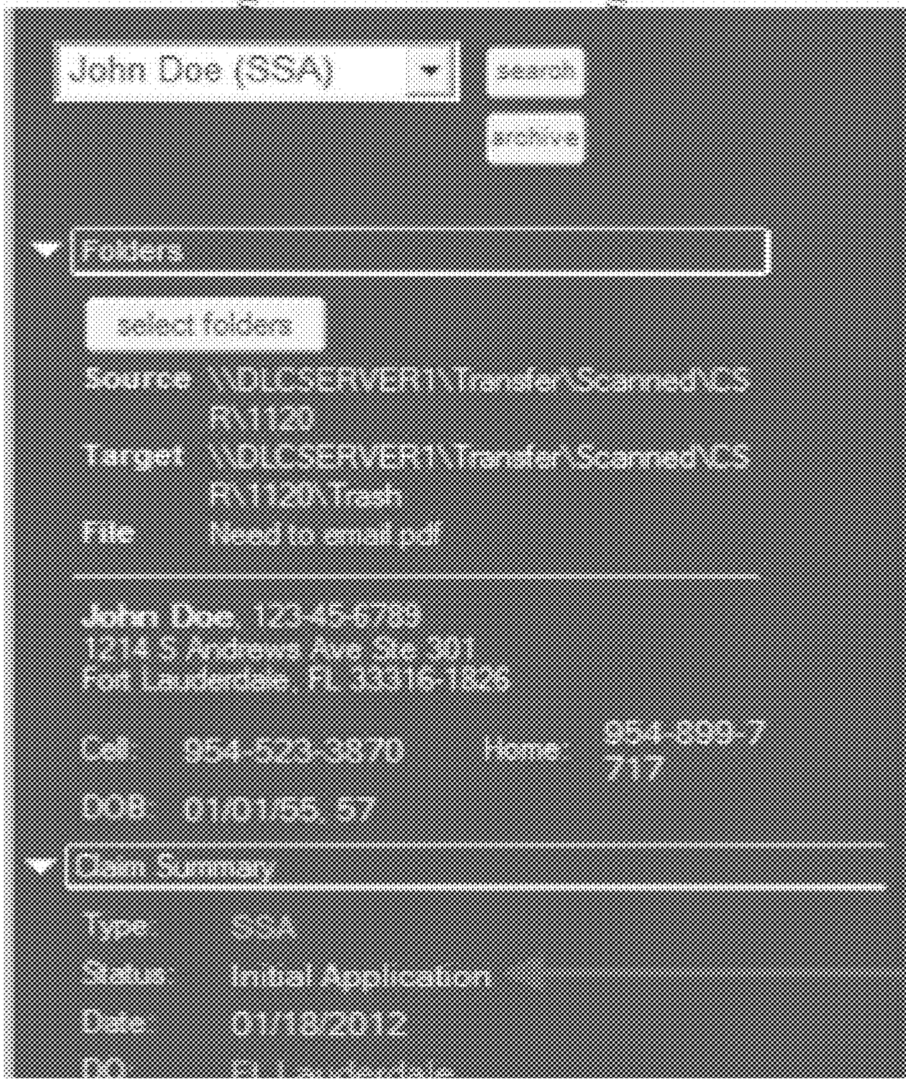


Fig 67a

After clicking "Yes" on the dialogue the document is imported.



By clicking "Yes" in the dialogue the document is imported which changes the status from Needs to File to Initial Application

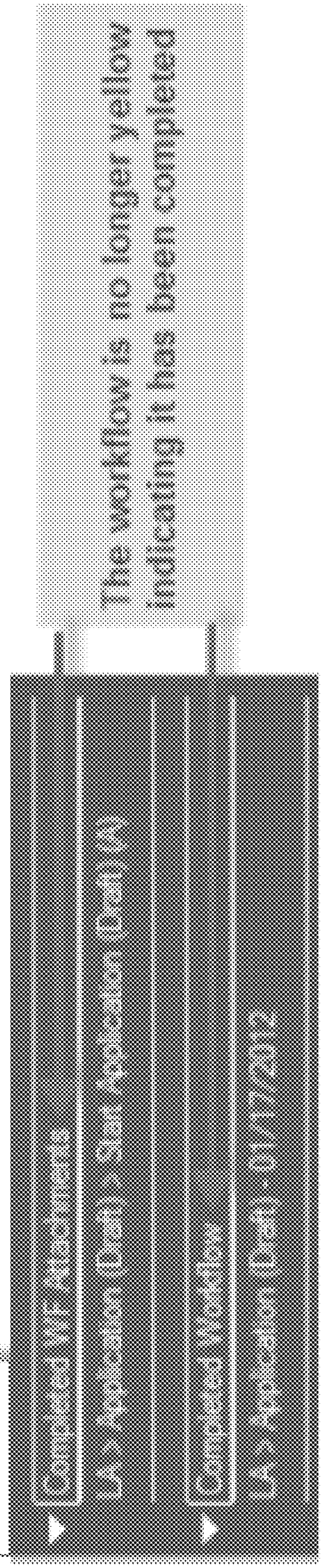

Completed WF Attachments
LA > Application (Draft) > Start Application (Draft) (A)
Completed Workflow
LA > Application (Draft) - 01/17/2012
The workflow is no longer yellow indicating it has been completed

Fig. 67b

Medical Records

Fig. 68

To access the "Medical Records" Import Wizard the user clicks Import > "Medical Records"

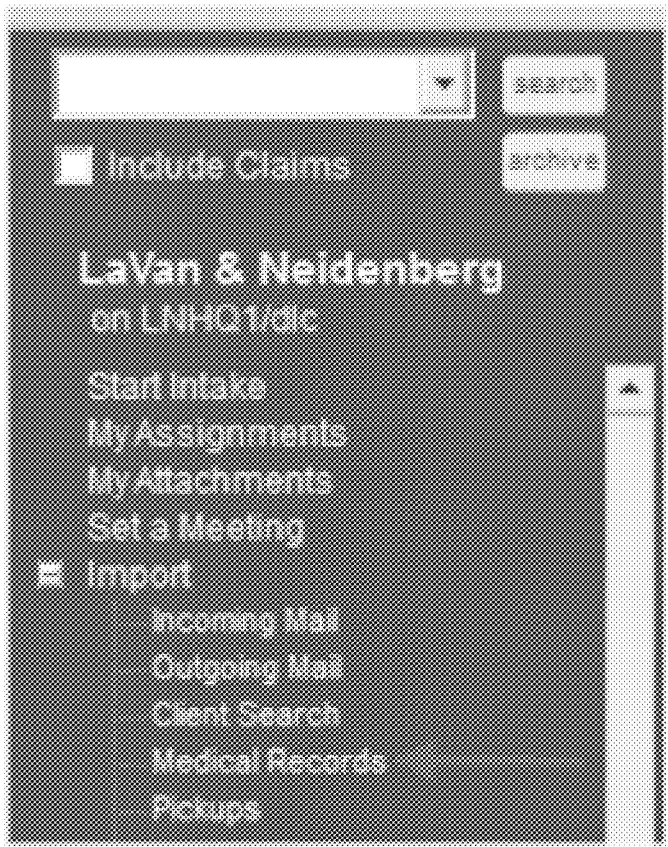


Fig 69

The "Medical Record" import window opens as shown below

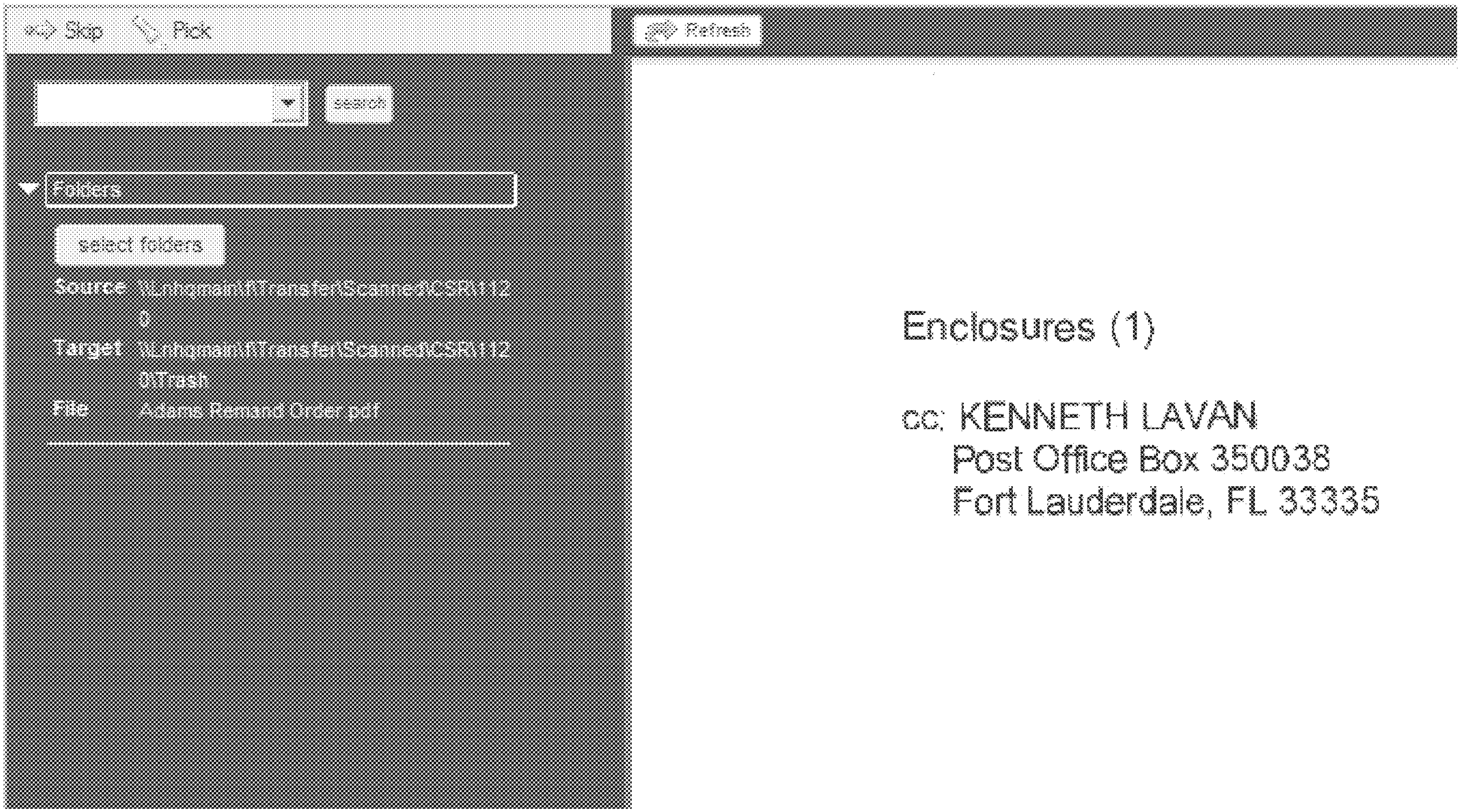
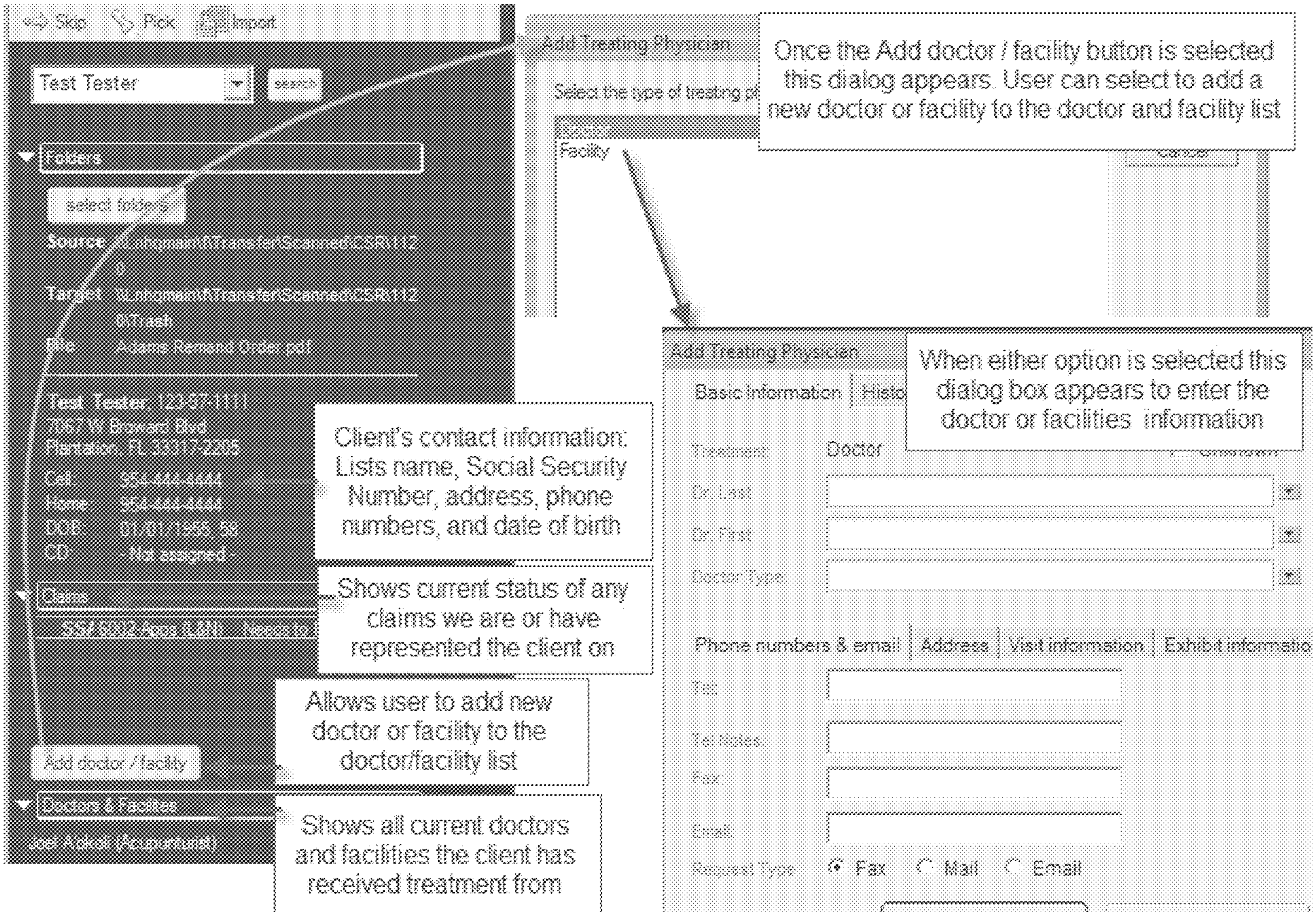
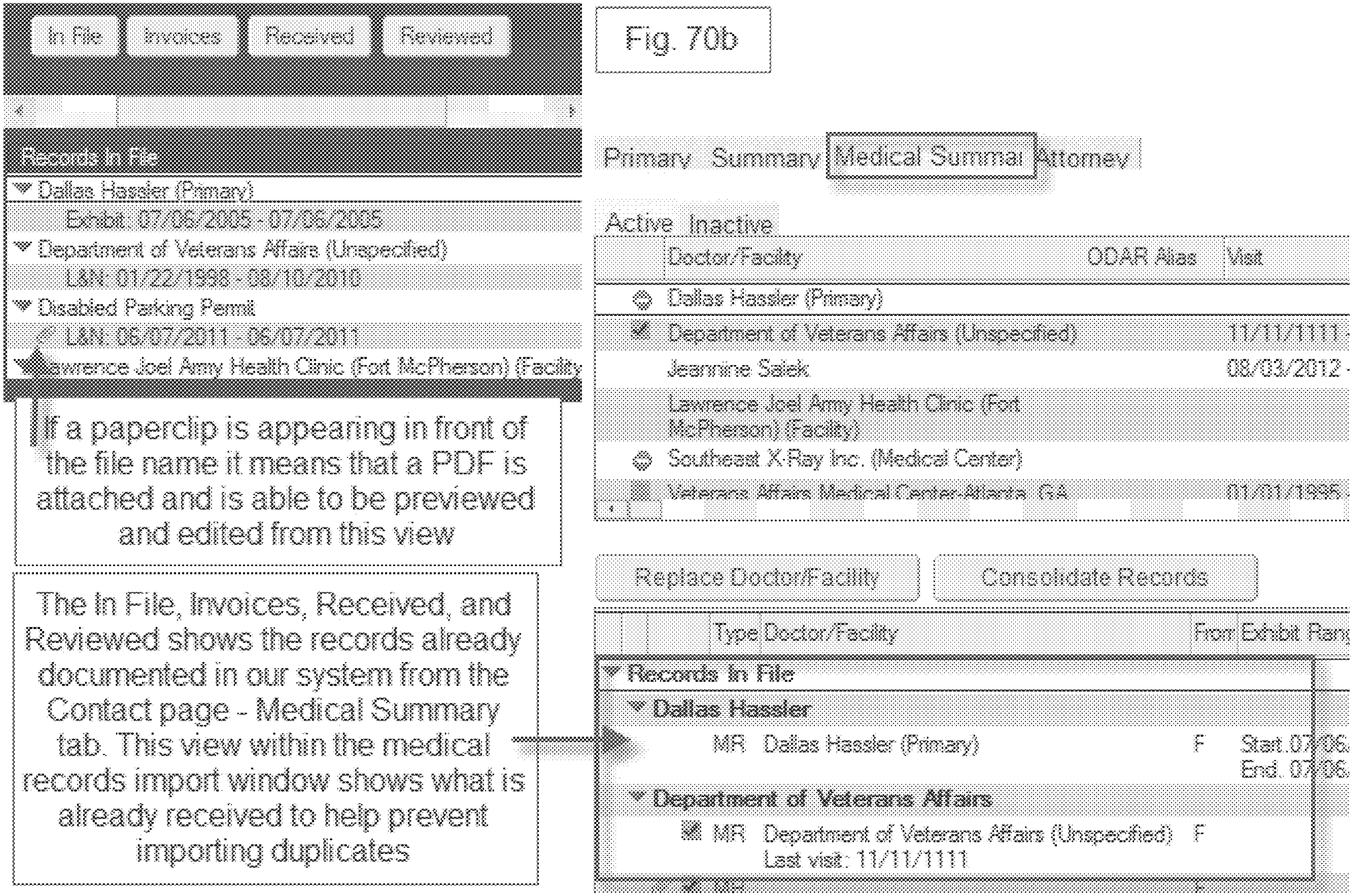


Fig. 70a



Skip
Pick
Import
Test Tester
search
Folders
select folders
Source
Target
File
Adams Remand Order.pdf
Test Tester
Cell
Home
DOB
CD
Not assigned
Claims
Add doctor / facility
Doctors & Facilities
Add Treating Physician
Facility
Once the Add doctor / facility button is selected this dialog appears. User can select to add a new doctor or facility to the doctor and facility list
Add Treating Physician
Basic Information
When either option is selected this dialog box appears to enter the doctor or facilities information
Doctor
Phone numbers & email
Address
Visit information
Fax
Mail
Email
Client's contact information: Lists name, Social Security Number, address, phone numbers, and date of birth
Shows current status of any claims we are or have represented the client on
Allows user to add new doctor or facility to the doctor/facility list
Shows all current doctors and facilities the client has received treatment from

Fig. 70b



In File
Invoices
Received
Reviewed
Records In File
Dallas Hassler (Primary)
Exhibit: 07/06/2005 - 07/06/2005
Department of Veterans Affairs (Unspecified)
L&N: 01/22/1998 - 08/10/2010
Disabled Parking Permit
L&N: 06/07/2011 - 06/07/2011
Lawrence Joel Army Health Clinic (Fort McPherson) (Facility
If a paperclip is appearing in front of the file name it means that a PDF is attached and is able to be previewed and edited from this view
The In File, Invoices, Received, and Reviewed shows the records already documented in our system from the Contact page - Medical Summary tab. This view within the medical records import window shows what is already received to help prevent importing duplicates
Primary
Summary
Medical Summai
Attorney
Active
Inactive
Doctor/Facility
ODAR Alias
Visit
Dallas Hassler (Primary)
Department of Veterans Affairs (Unspecified)
11/11/1111
Jeannine Salek
08/03/2012
Lawrence Joel Army Health Clinic (Fort McPherson) (Facility)
Southeast X-Ray Inc. (Medical Center)
Replace Doctor/Facility
Consolidate Records
Type
Doctor/Facility
From
Exhibit Rang
Records In File
Dallas Hassler
MR
Dallas Hassler (Primary)
F
Department of Veterans Affairs
MR
Department of Veterans Affairs (Unspecified)
F
Last visit: 11/11/1111

Fig. 71

Once the appropriate client and document have been selected the user clicks "Import".

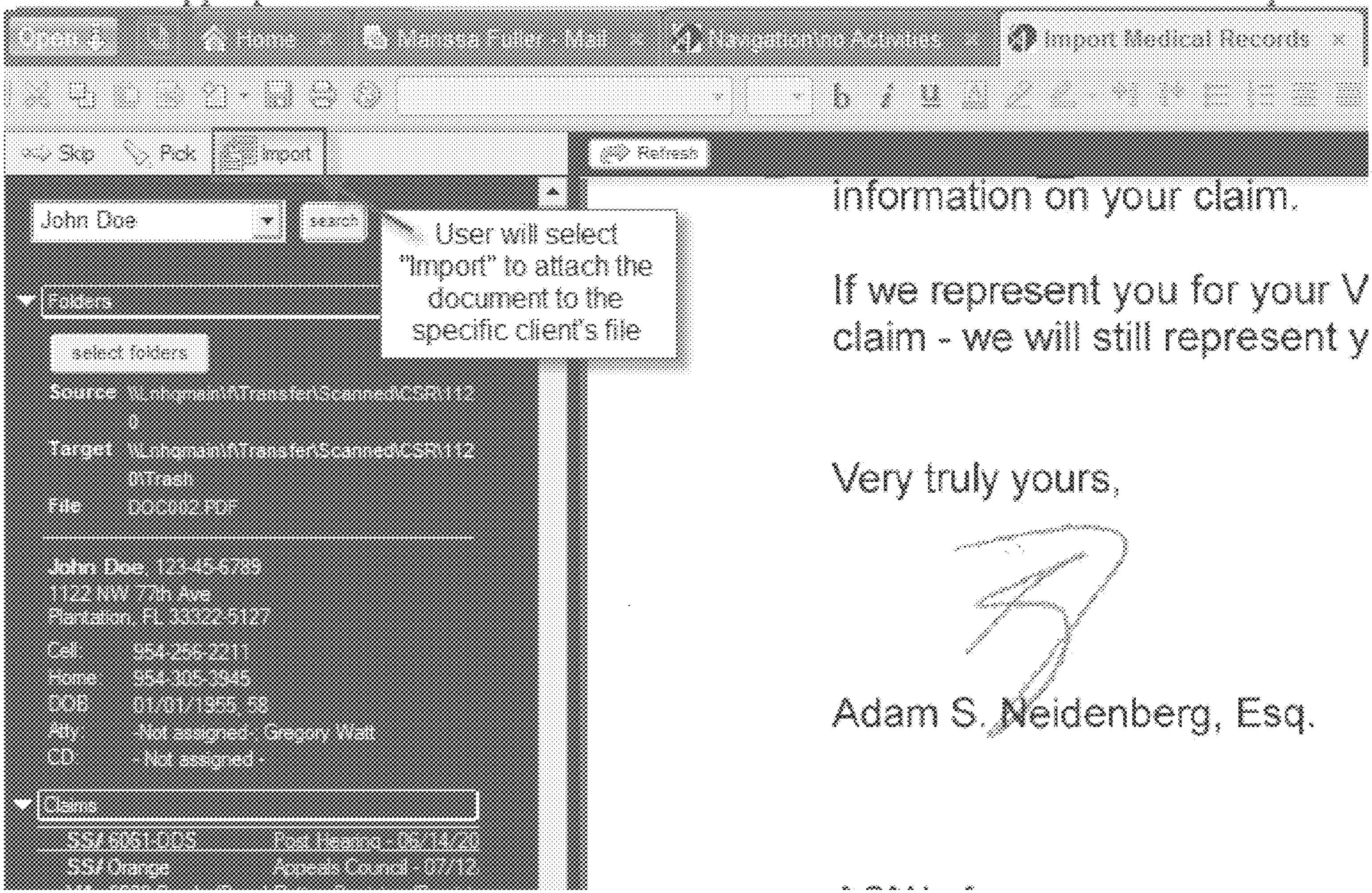
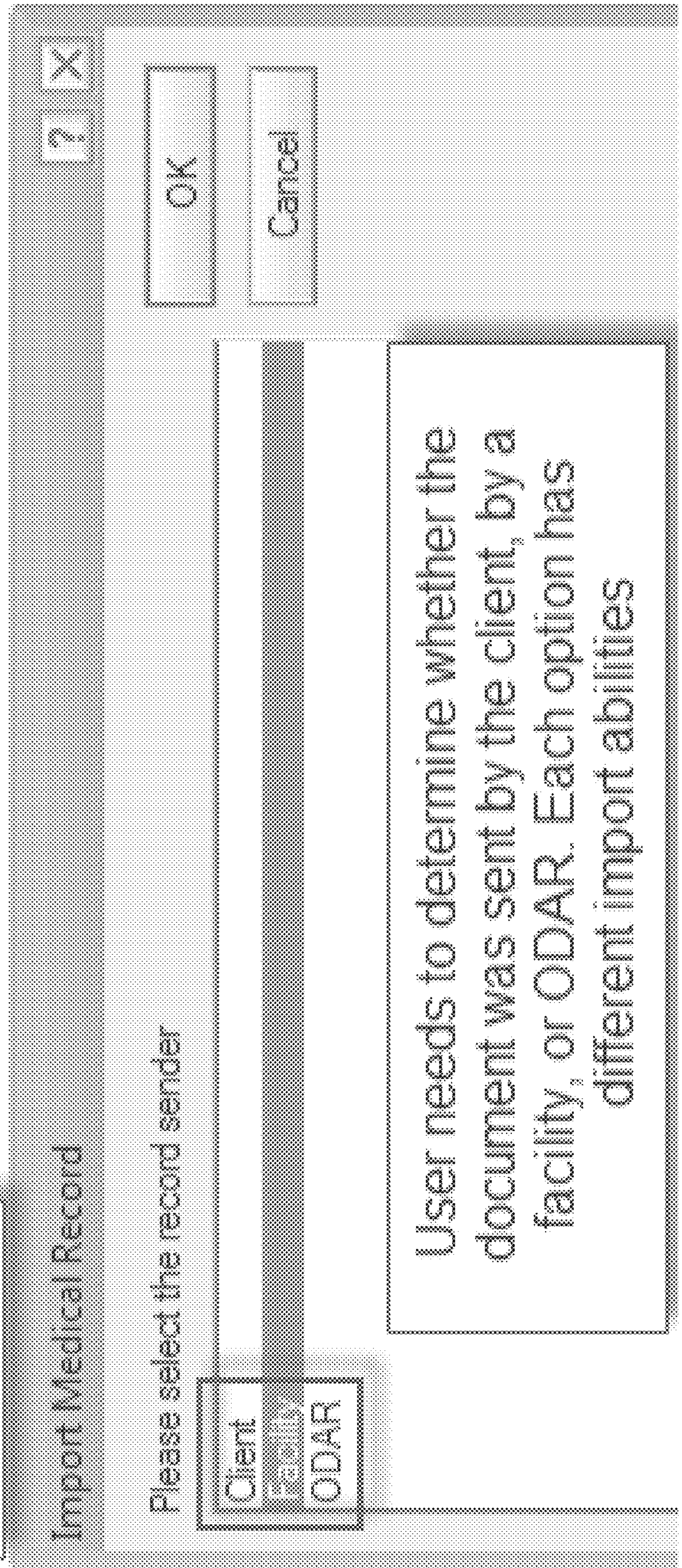


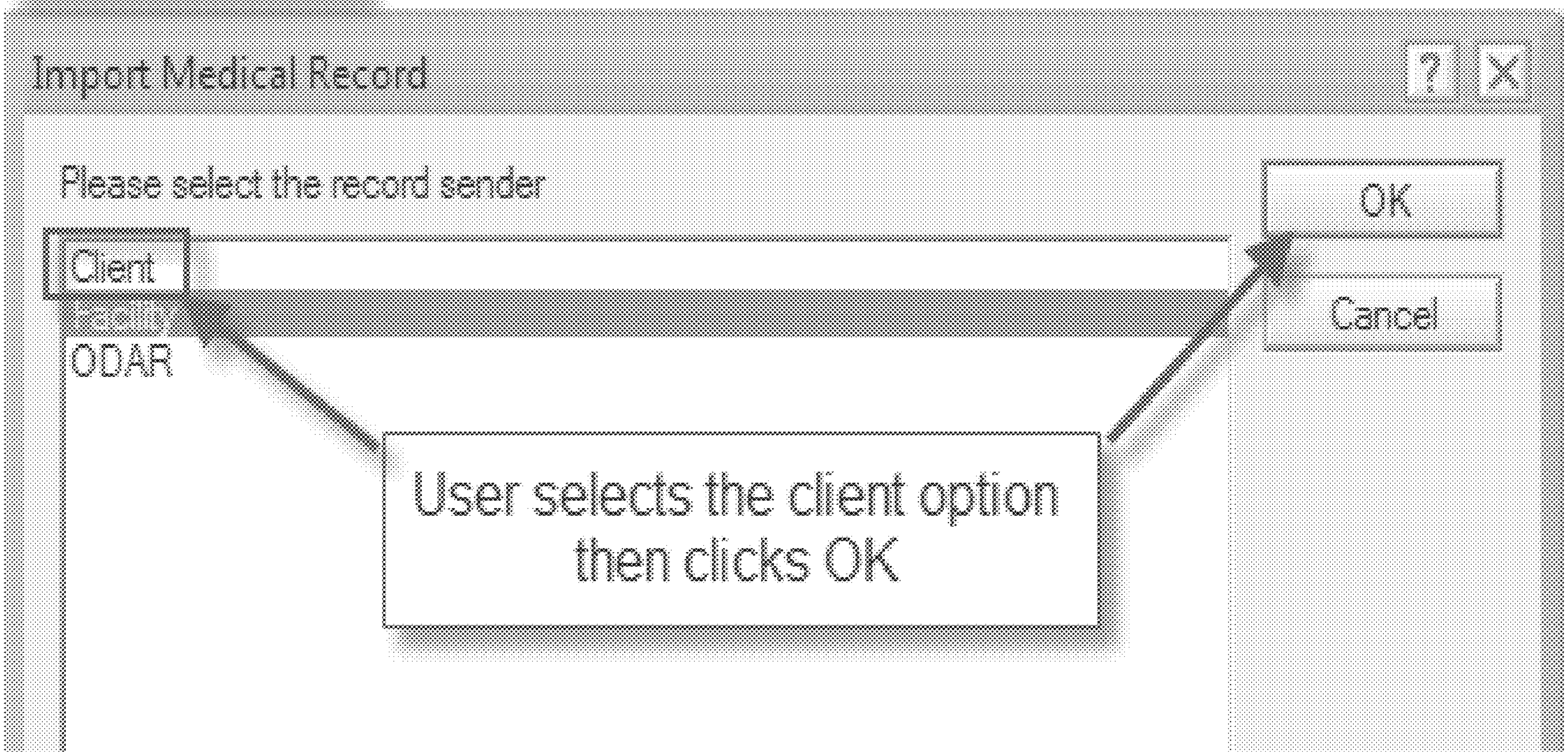
Fig. 72


Import Medical Record
Please select the record sender
Client
Facility
ODAR
OK
Cancel
User needs to determine whether the document was sent by the client, by a facility, or ODAR. Each option has different import abilities

The following print screens will breakdown the dialogue explaining it in 3 sections:

Section 1 - Using the Client import option

Fig. 73



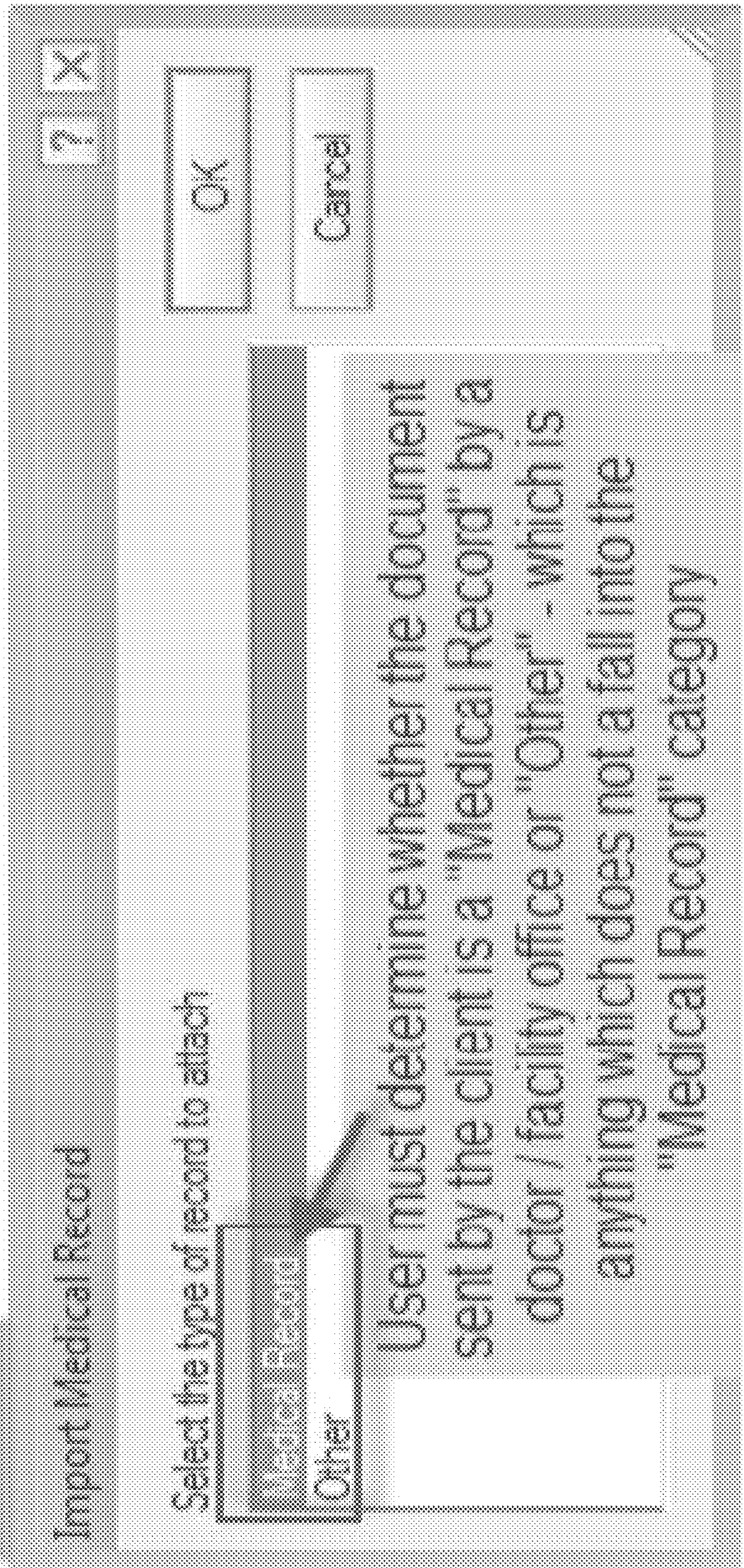

Import Medical Record
?
X
Select the type of record to attach
Medical Record
Other
OK
Cancel
User must determine whether the document sent by the client is a "Medical Record" by a doctor / facility office or "Other" - which is anything which does not a fall into the "Medical Record" category

Fig. 74

Fig 75

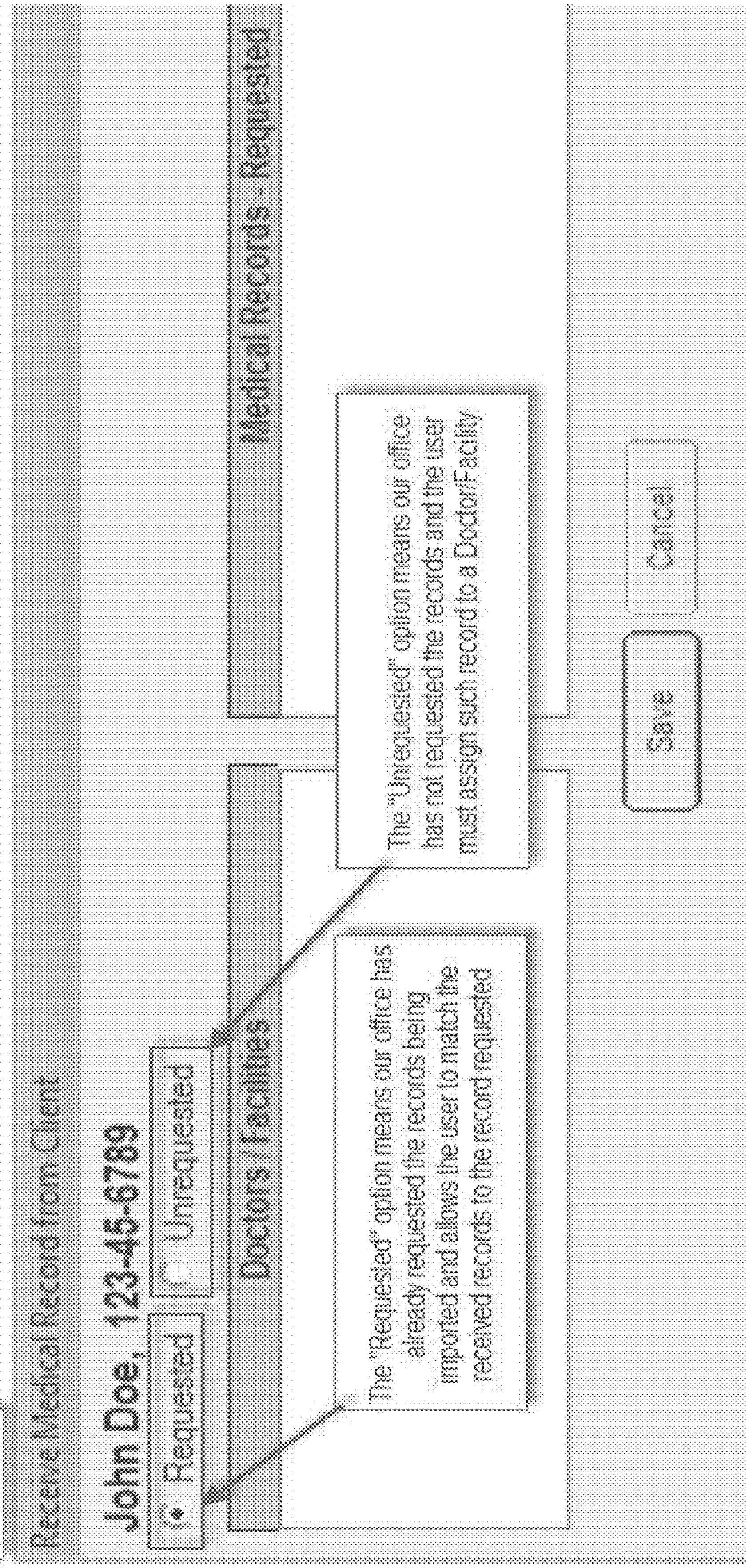

Receive Medical Record from Client
John Doe, 123-45-6789
Requested
Unrequested
Doctors / Facilities
Medical Records - Requested
The "Requested" option means our office has already requested the records being imported and allows the user to match the received records to the record requested
The "Unrequested" option means our office has not requested the records and the user must assign such record to a Doctor/Facility
Save
Cancel

Fig. 76a

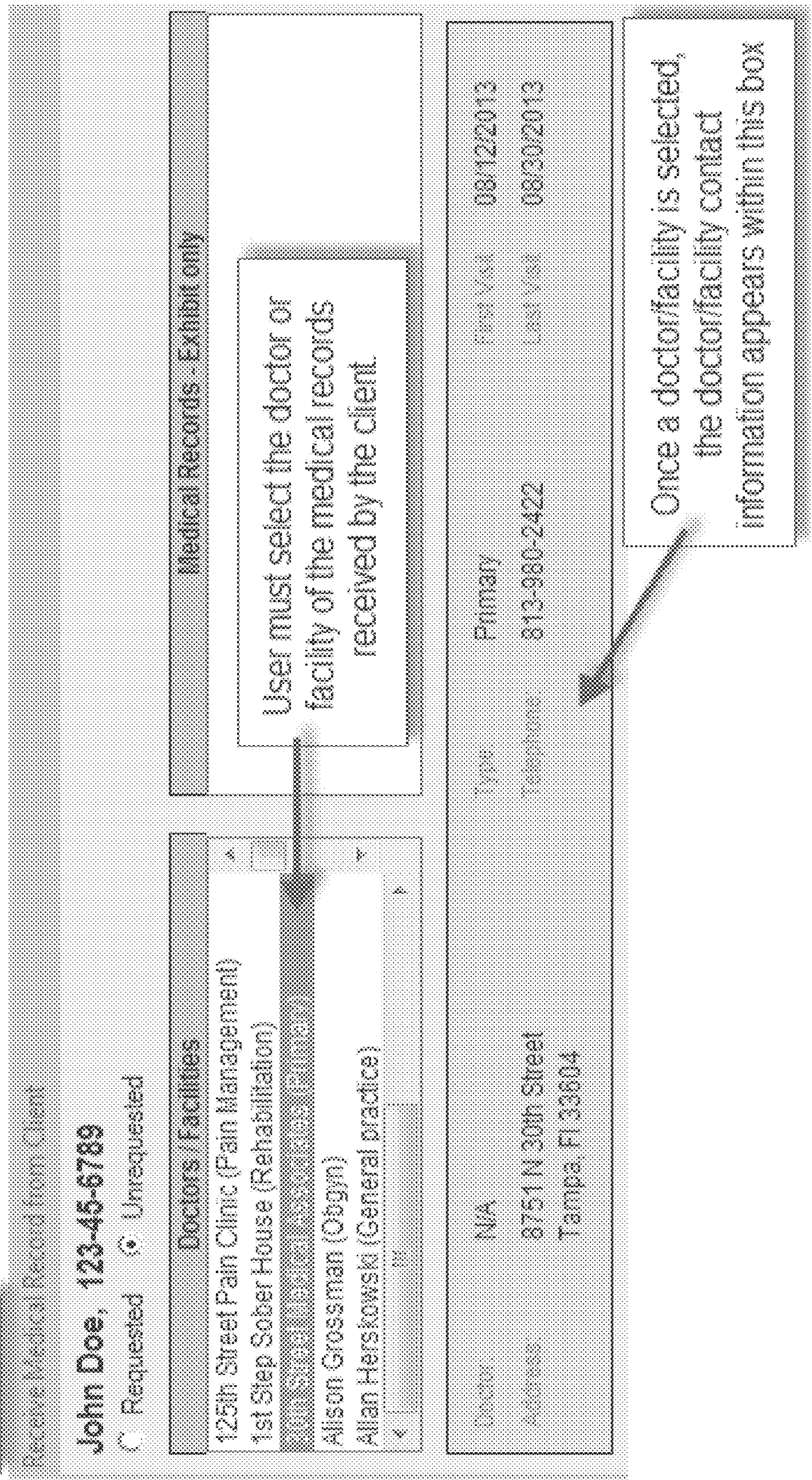
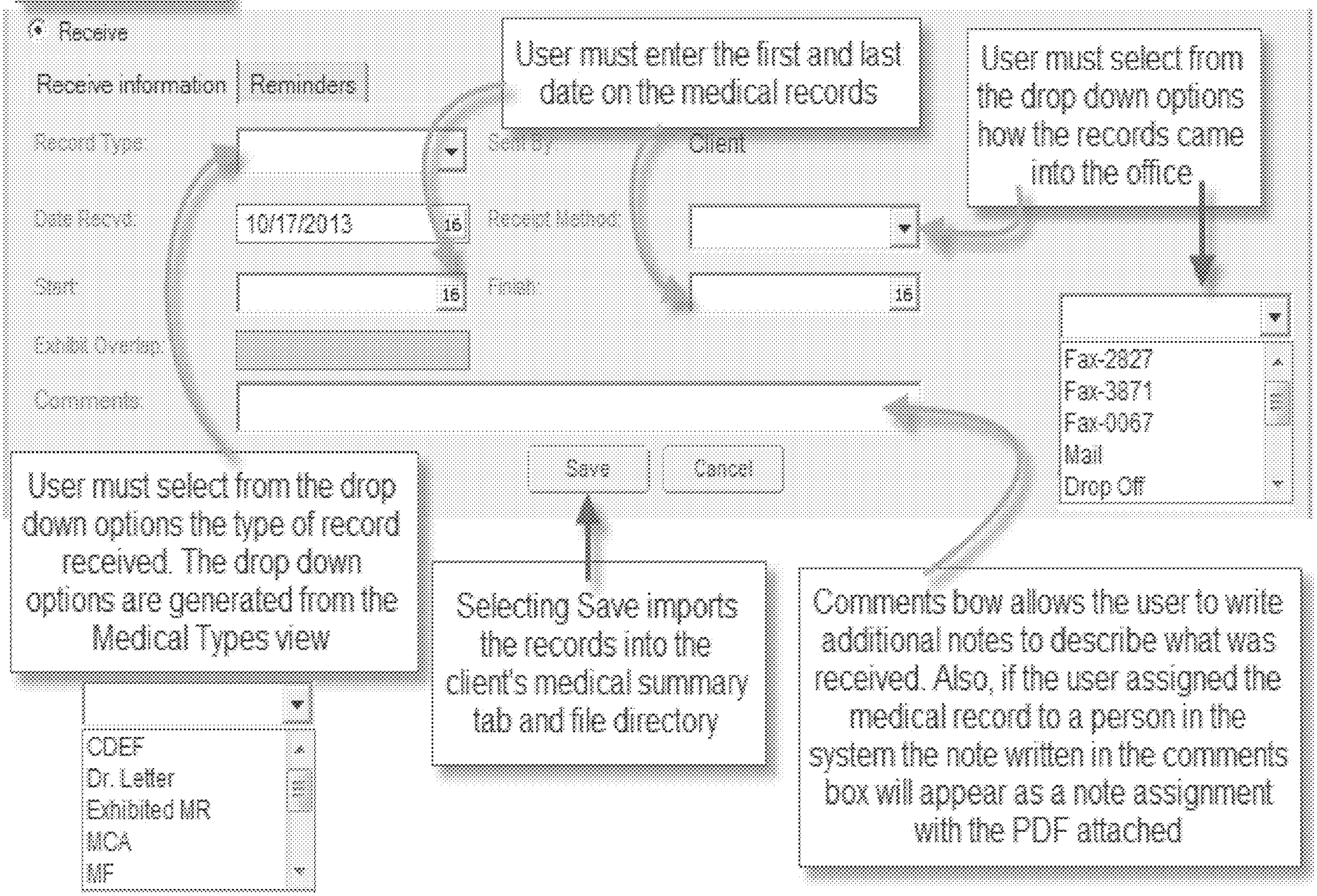
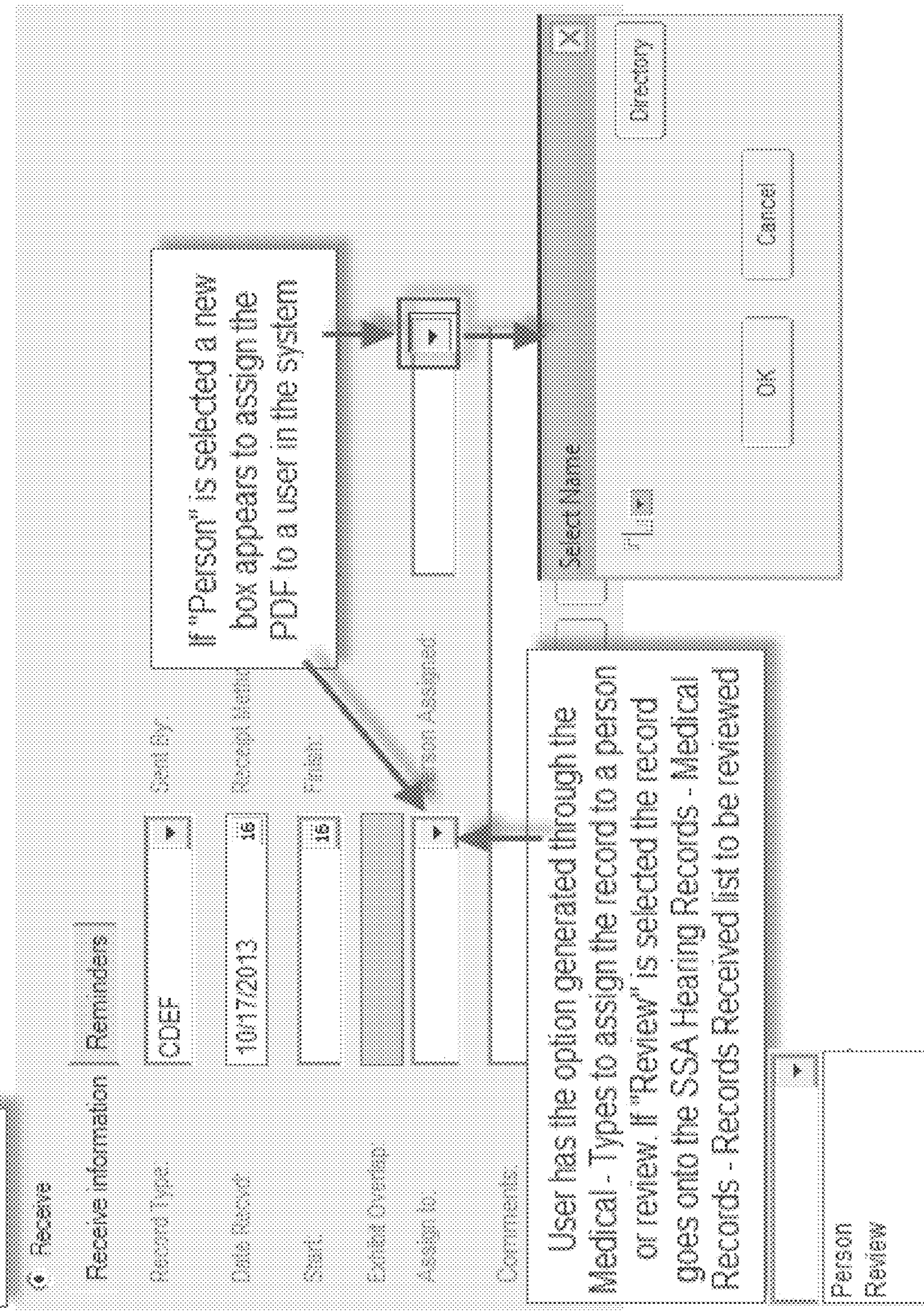

John Doe, 123-45-6789
Requested
Unrequested
Doctors / Facilities
125th Street Pain Clinic (Pain Management)
1st Step Sober House (Rehabilitation)
Alison Grossman (Obgyn)
Allan Herskowski (General practice)
Medical Records - Exhibit only
User must select the doctor or facility of the medical records received by the client
NA
8751 N 30th Street
Tampa, Fl 33604
Primary
813-980-2422
08/12/2013
08/30/2013
Once a doctor/facility is selected, the doctor/facility contact information appears within this box

Fig. 76b


Receive
Receive information
Reminders
Record Type
Date Recvd
10/17/2013
Start
Exhibit Overlap
Comments
Client
Receipt Method
Finish
Save
Cancel
User must enter the first and last date on the medical records
User must select from the drop down options how the records came into the office
Fax-2827
Fax-3871
Fax-0067
Mail
Drop Off
User must select from the drop down options the type of record received. The drop down options are generated from the Medical Types view
CDEF
Dr. Letter
Exhibited MR
MCA
MF
Selecting Save imports the records into the client's medical summary tab and file directory
Comments bow allows the user to write additional notes to describe what was received. Also, if the user assigned the medical record to a person in the system the note written in the comments box will appear as a note assignment with the PDF attached

"Unrequested" dialogue continued

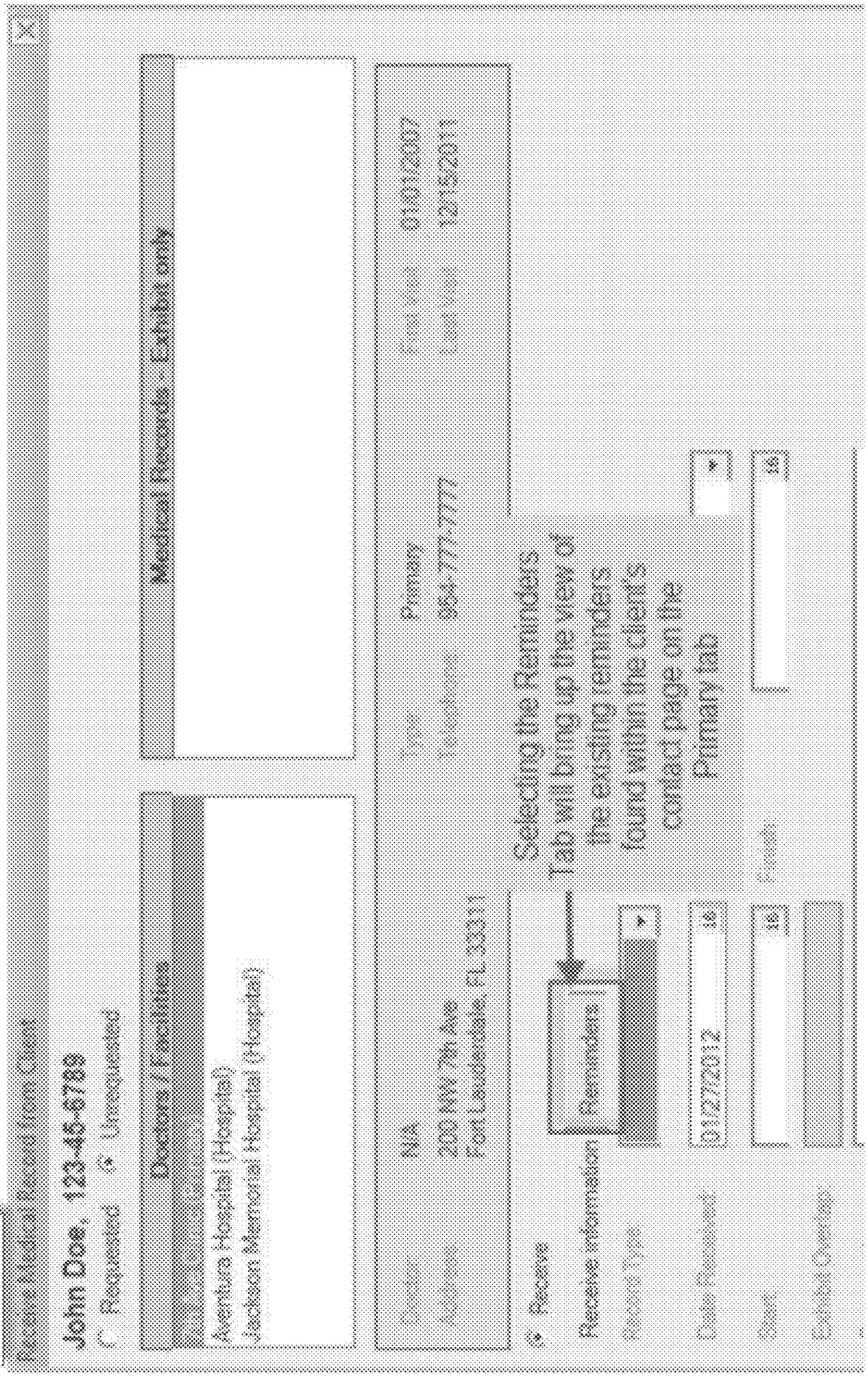
Fig. 77



"Unrequested" dialogue continued Part 3

Reminders tab from the Import Window

Fig. 78



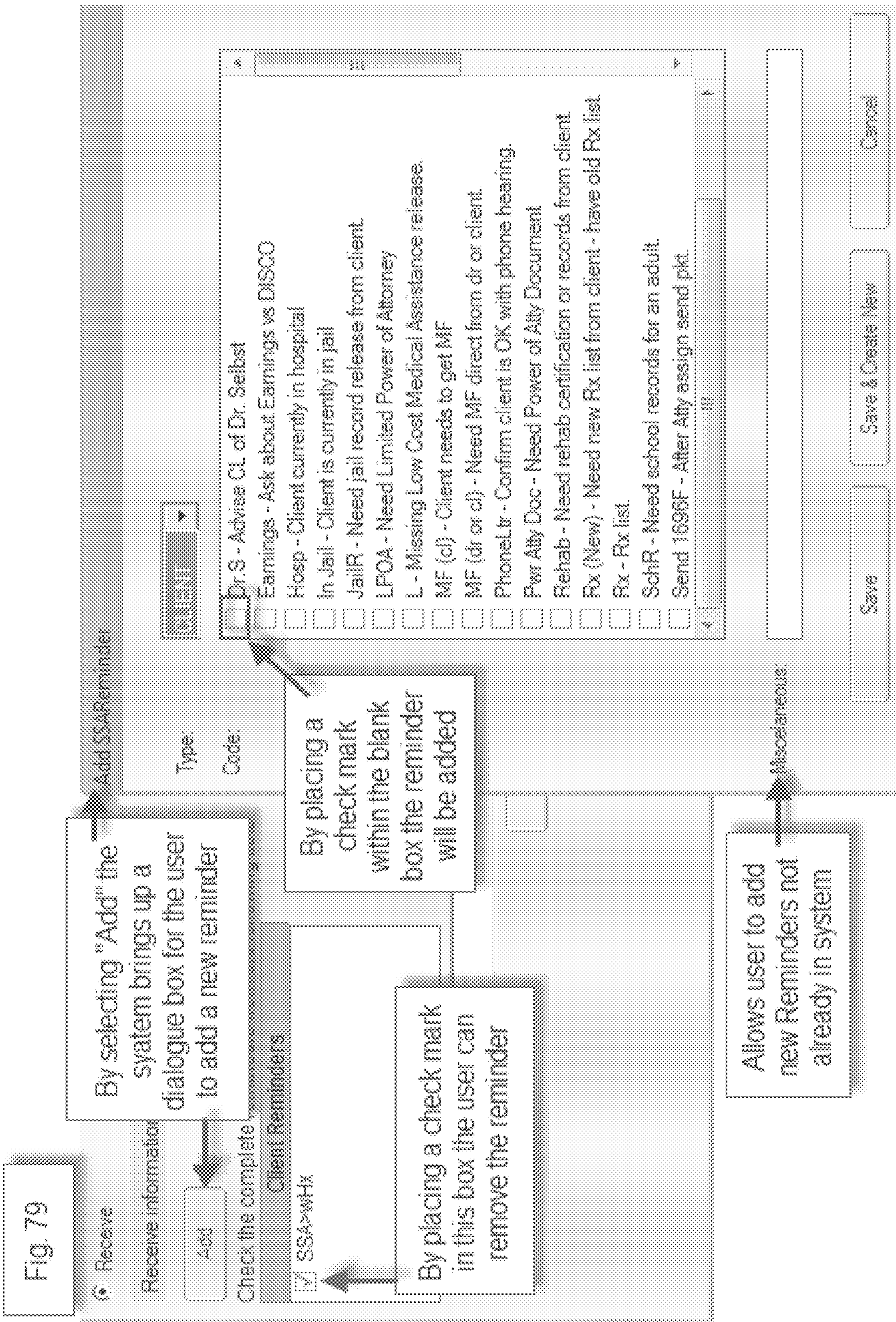
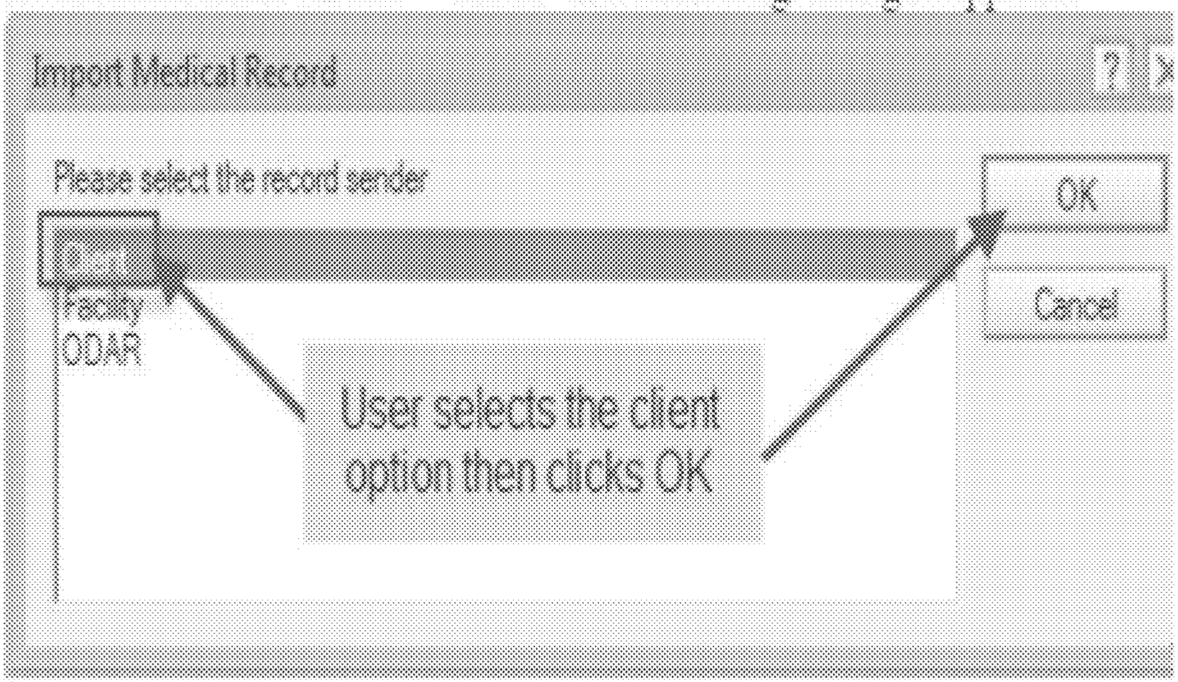
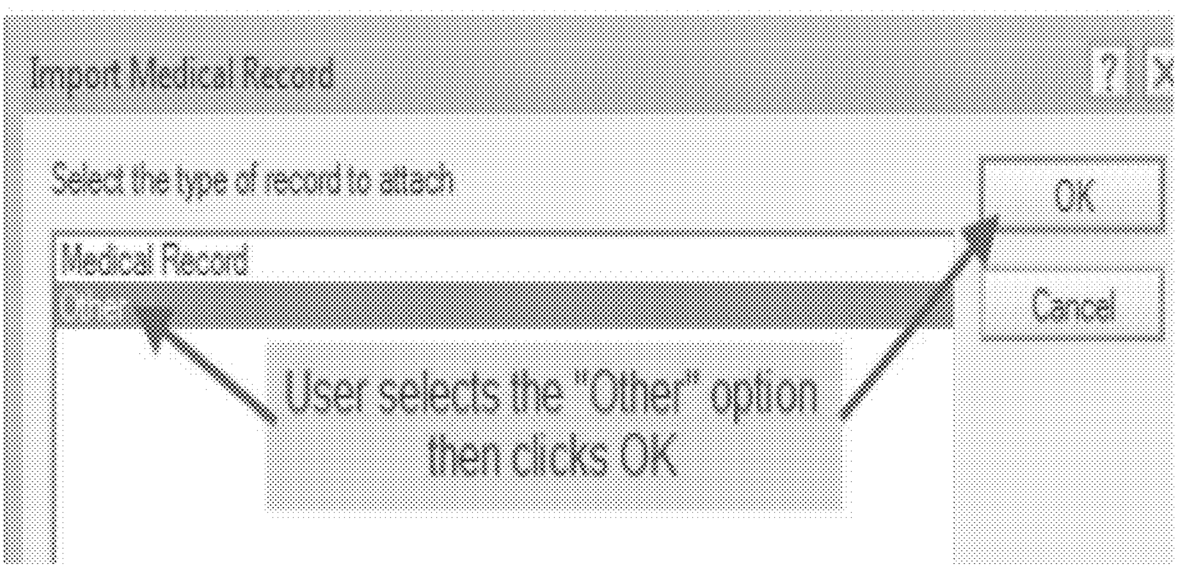

Receive
Receive informatio
Add
Check the complete
Client Reminders
SSA>wHx
By selecting "Add" the Syatem brings up a dialogue box for the user to add a new reminder
By placing a check mark in this box the user can remove the reminder
Add SSAReminder
Type:
Code:
Dr. S - Advise CL of Dr. Seibst
Earnings - Ask about Earnings vs DISCO
Hosp - Client currently in hospital
In Jail - Client is currently in jail
JailR - Need jail record release from client.
LPOA - Need Limited Power of Attorney
L - Missing Low Cost Medical Assistance release.
MF (cl) - Client needs to get MF
MF (dr or cl) - Need MF direct from dr or client.
PhoneLtr - Confirm client is OK with phone hearing.
Pwr Atty Doc - Need Power of Atty Document
Rehab - Need rehab certification or records from client.
Rx (New) - Need new Rx list from client - have old Rx list.
Rx - Rx list
SchR - Need school records for an adult.
Send 1696F - After Atty assign send pkt.
By placing a check mark within the blank box the reminder will be added
Miscelaneous:
Allows user to add new Reminders not already in system
Save
Save & Create New
Cancel

Fig. 79

Fig. 80

If the user selects Client > "Other" the following dialogue appears.





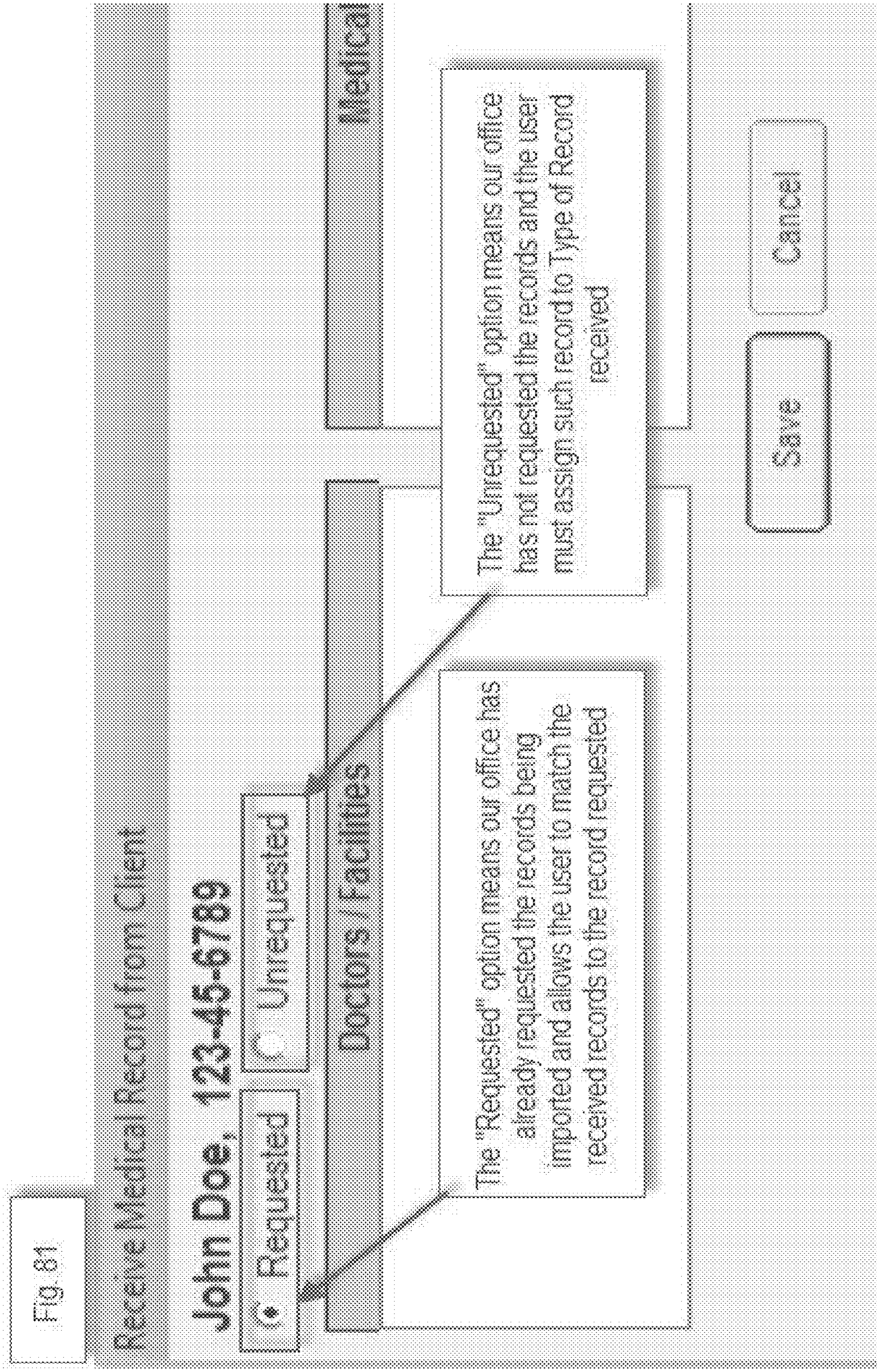


Fig. 81
Receive Medical Record from Client
John Doe, 123-45-6789
Requested
Unrequested
Doctors / Facilities
Medical
The "Requested" option means our office has already requested the records being imported and allows the user to match the received records to the record requested
The "Unrequested" option means our office has not requested the records and the user must assign such record to Type of Record received
Save
Cancel

Fig. 82

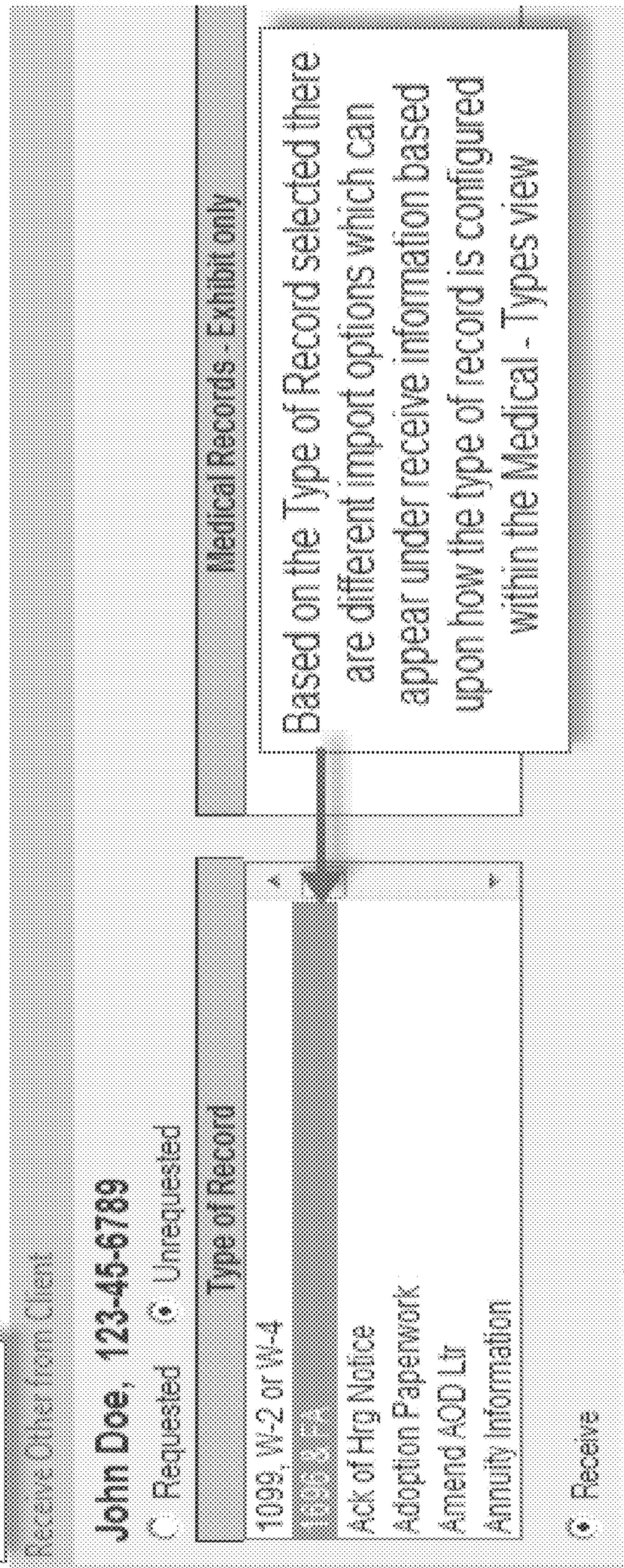
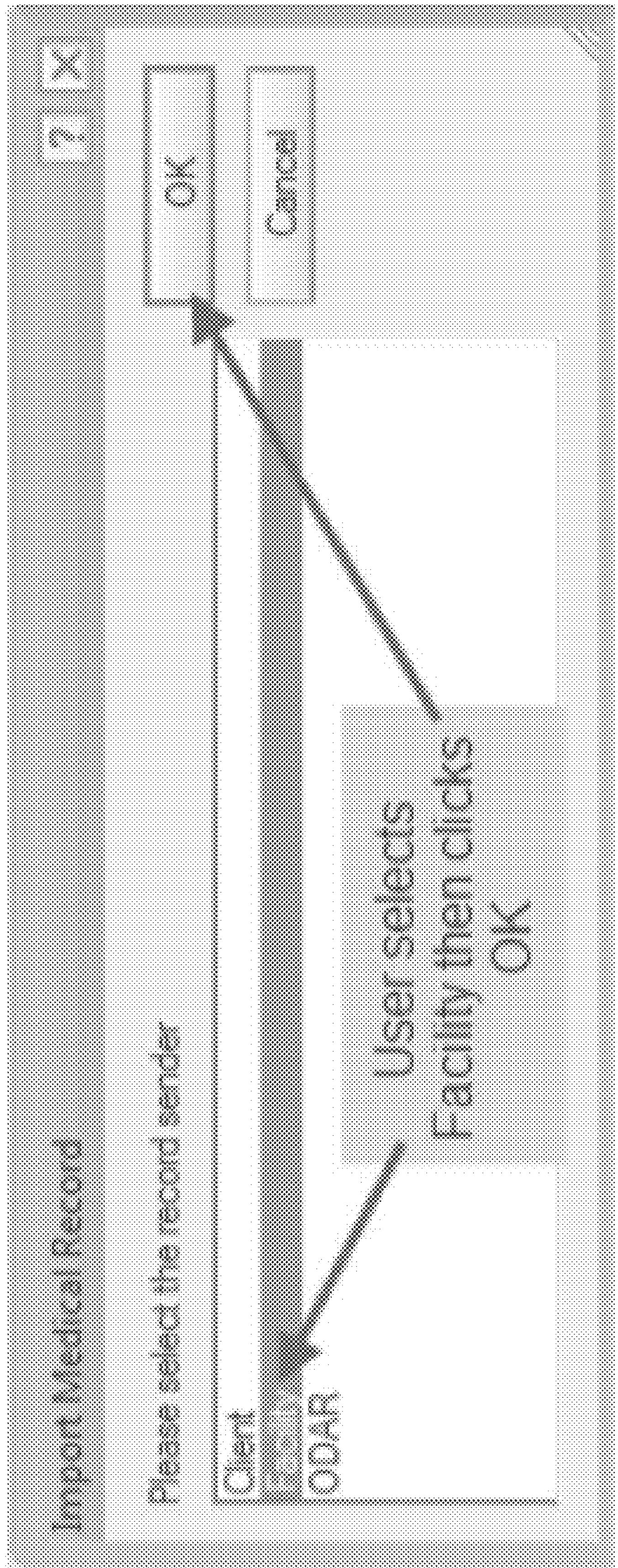

John Doe, 123-45-6789
Requested
Unrequested
Type of Record
1099, W-2 or W-4
Ack of Hrg Notice
Adoption Paperwork
Amend AOD Ltr
Annuity Information
Receive
Medical Records - Exhibit only
Based on the Type of Record selected there are different import options which can appear under receive information based upon how the type of record is configured within the Medical - Types view

Fig. 83

Section 2 – If the user selects the facility option this dialog will appear.



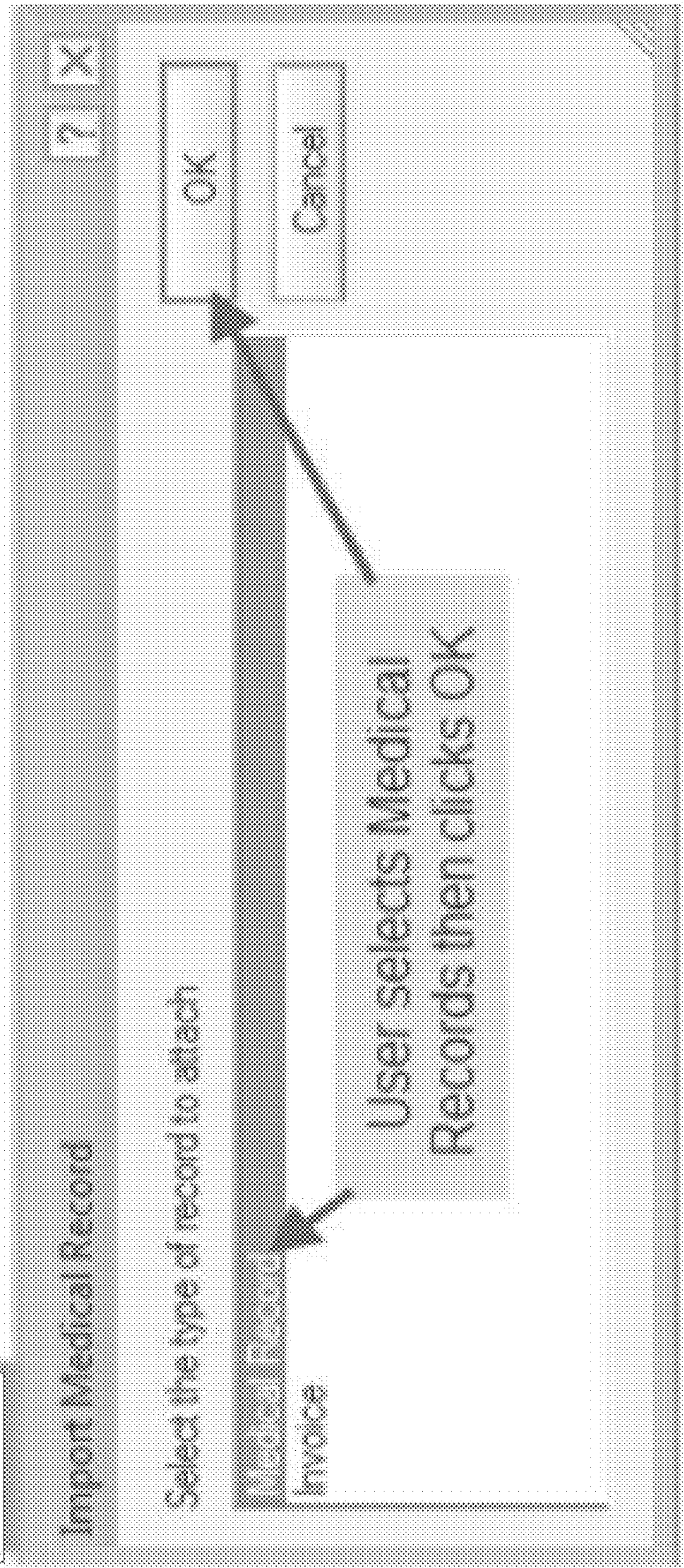

Import Medical Record
Select the type of record to attach
Invoice
OK
Cancel
User selects Medical Records then clicks OK

Fig. 84

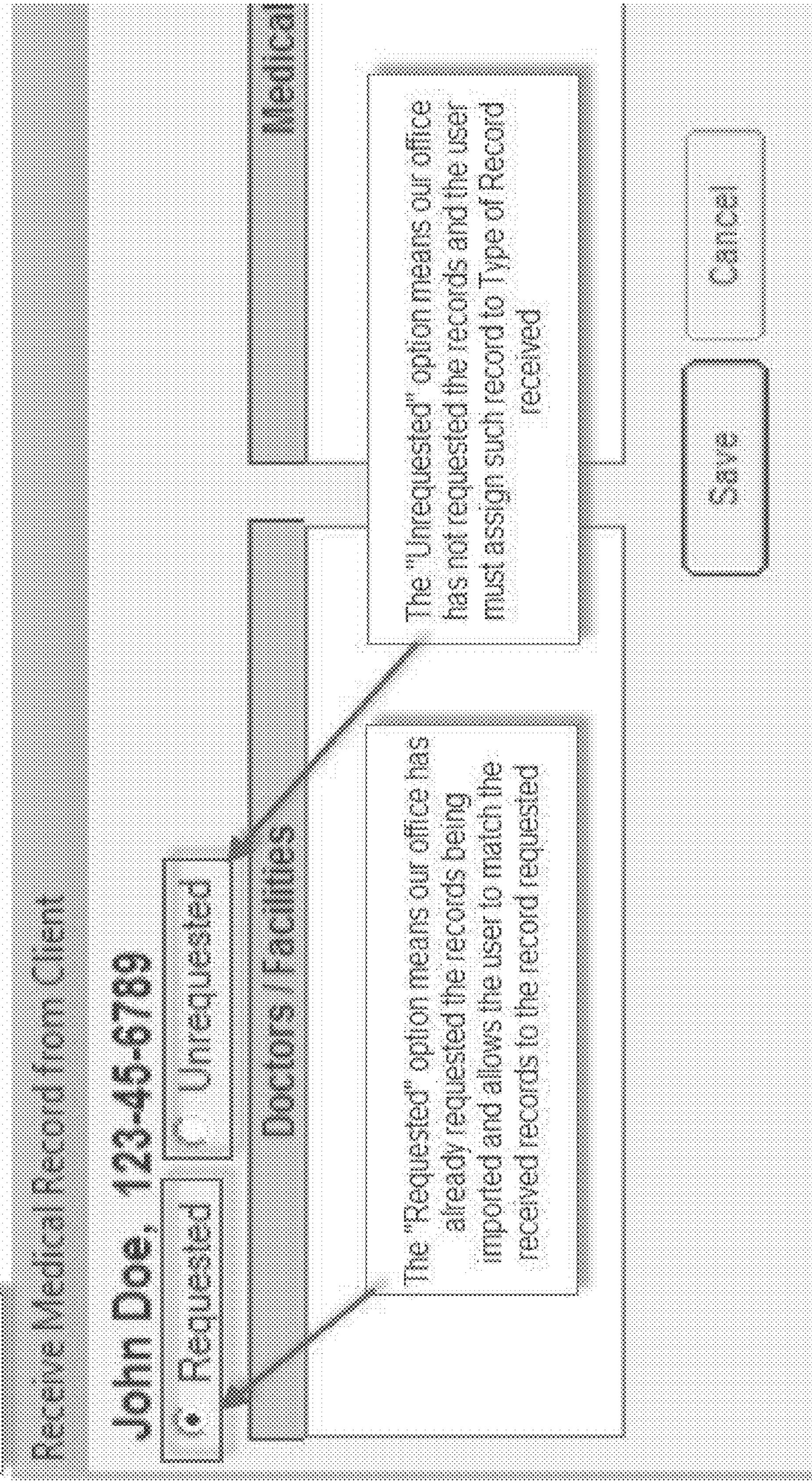
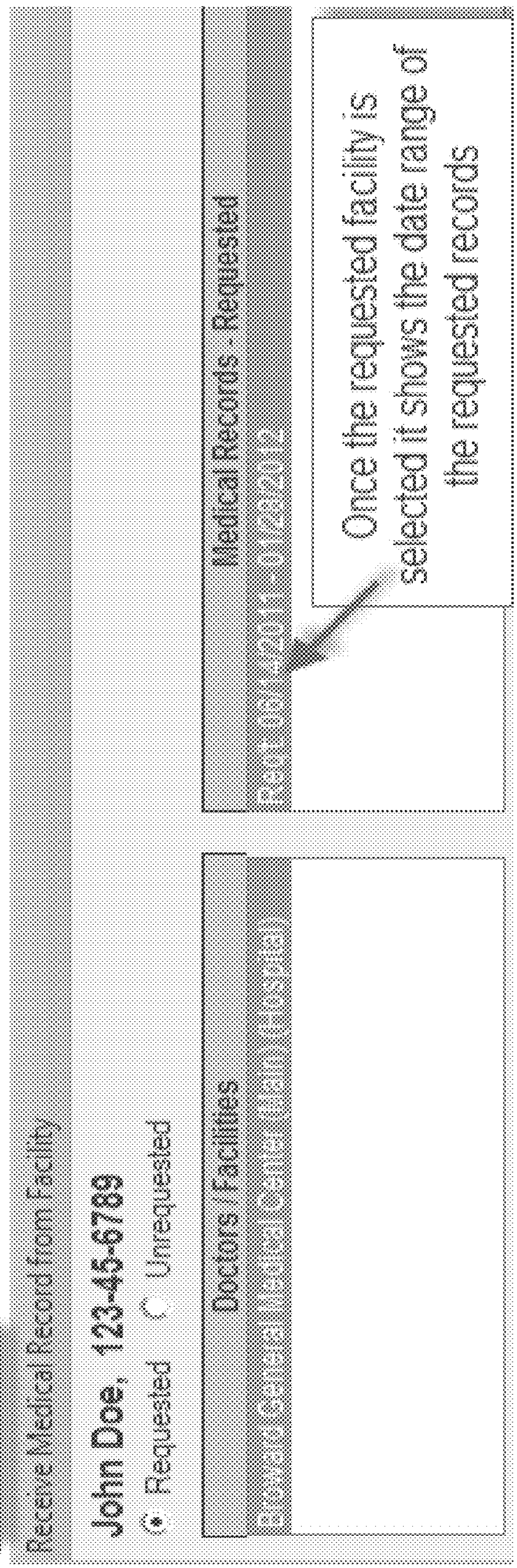

Receive Medical Record from Client
John Doe, 123-45-6789
Requested
Unrequested
Doctors / Facilities
The "Requested" option means our office has already requested the records being imported and allows the user to match the received records to the record requested
The "Unrequested" option means our office has not requested the records and the user must assign such record to Type of Record received
Save
Cancel

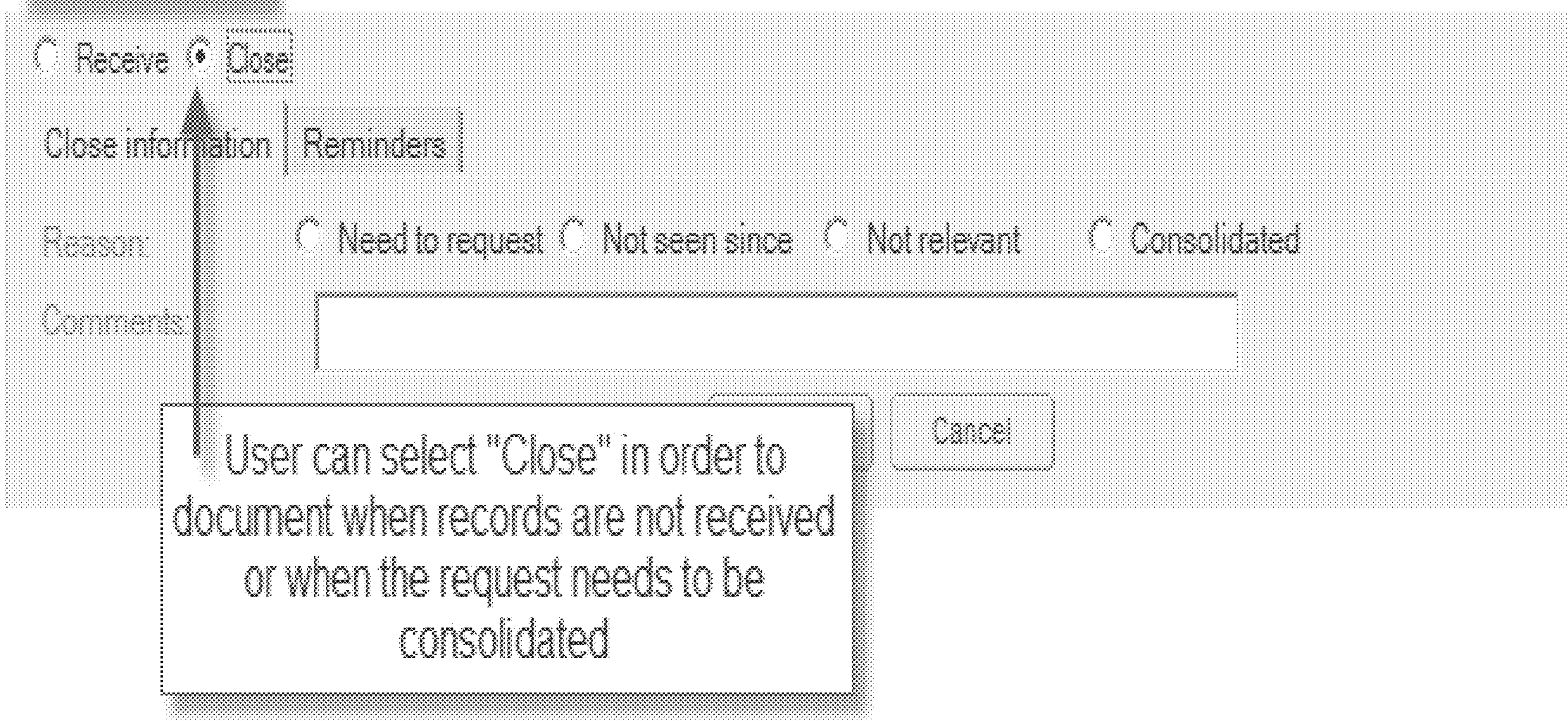
Fig 85

Fig. 86


Receive Medical Record from Facility
John Doe, 123-45-6789
Requested
Unrequested
Doctors / Facilities
Medical Records - Requested
Once the requested facility is selected it shows the date range of the requested records

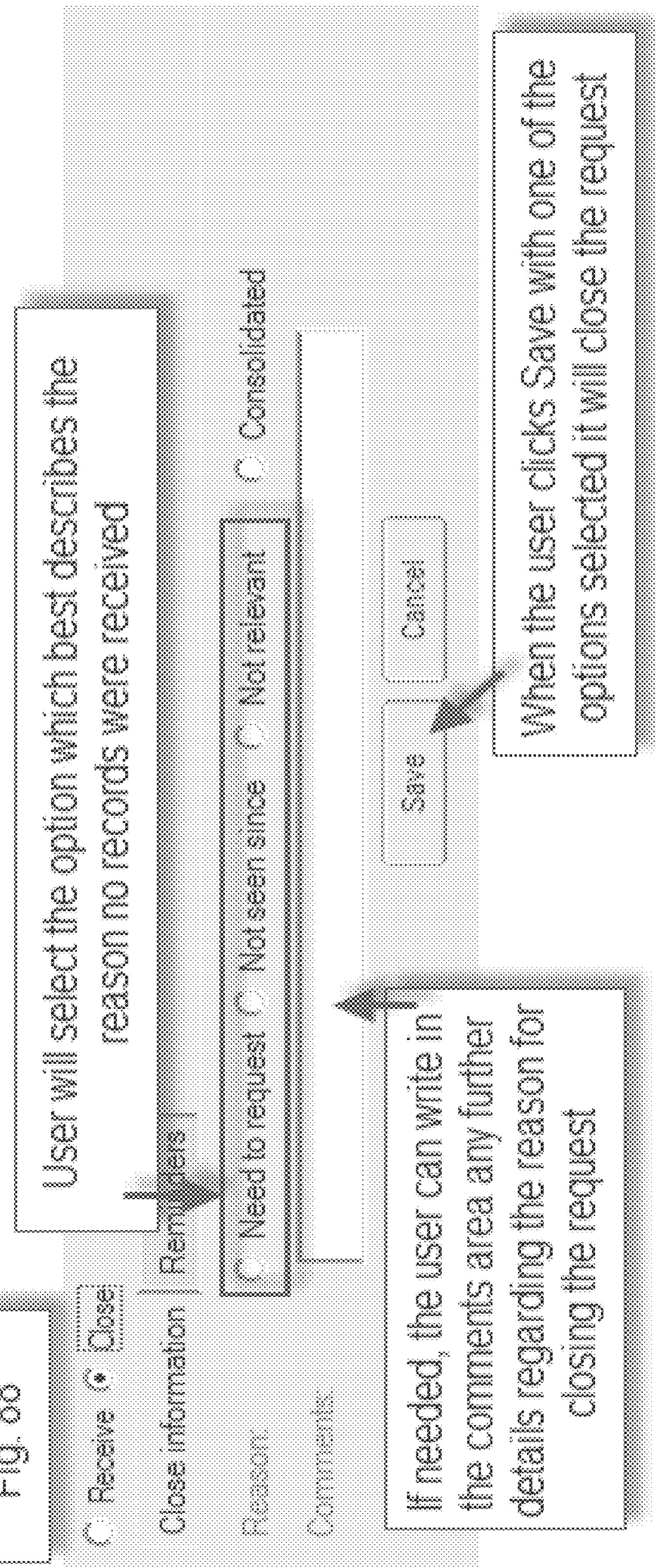
"Close" option from the Import - Facility - Medical Records - Requested window appears as shown below:

Fig. 87



"Close" Option continued

Fig. 88



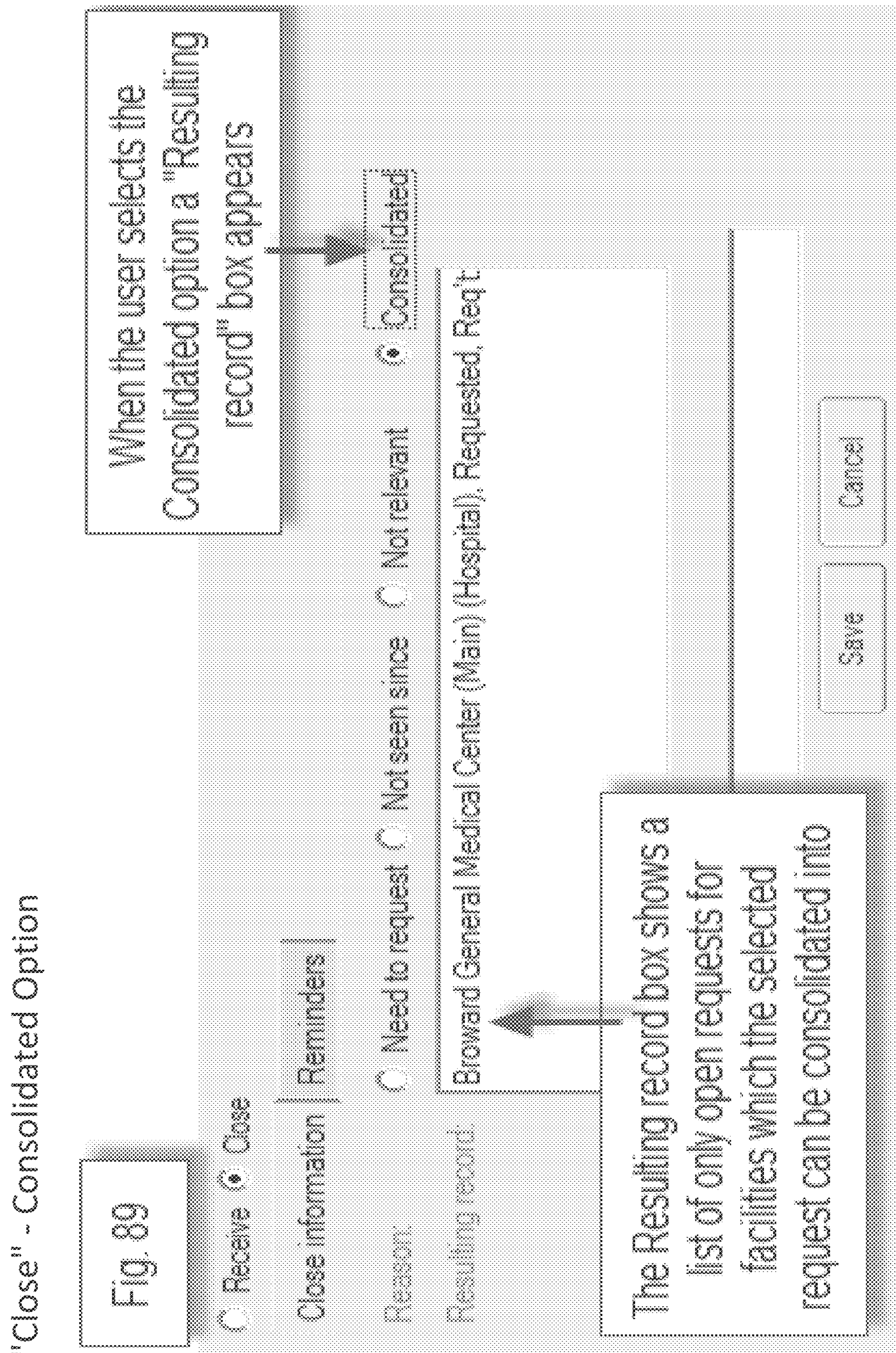
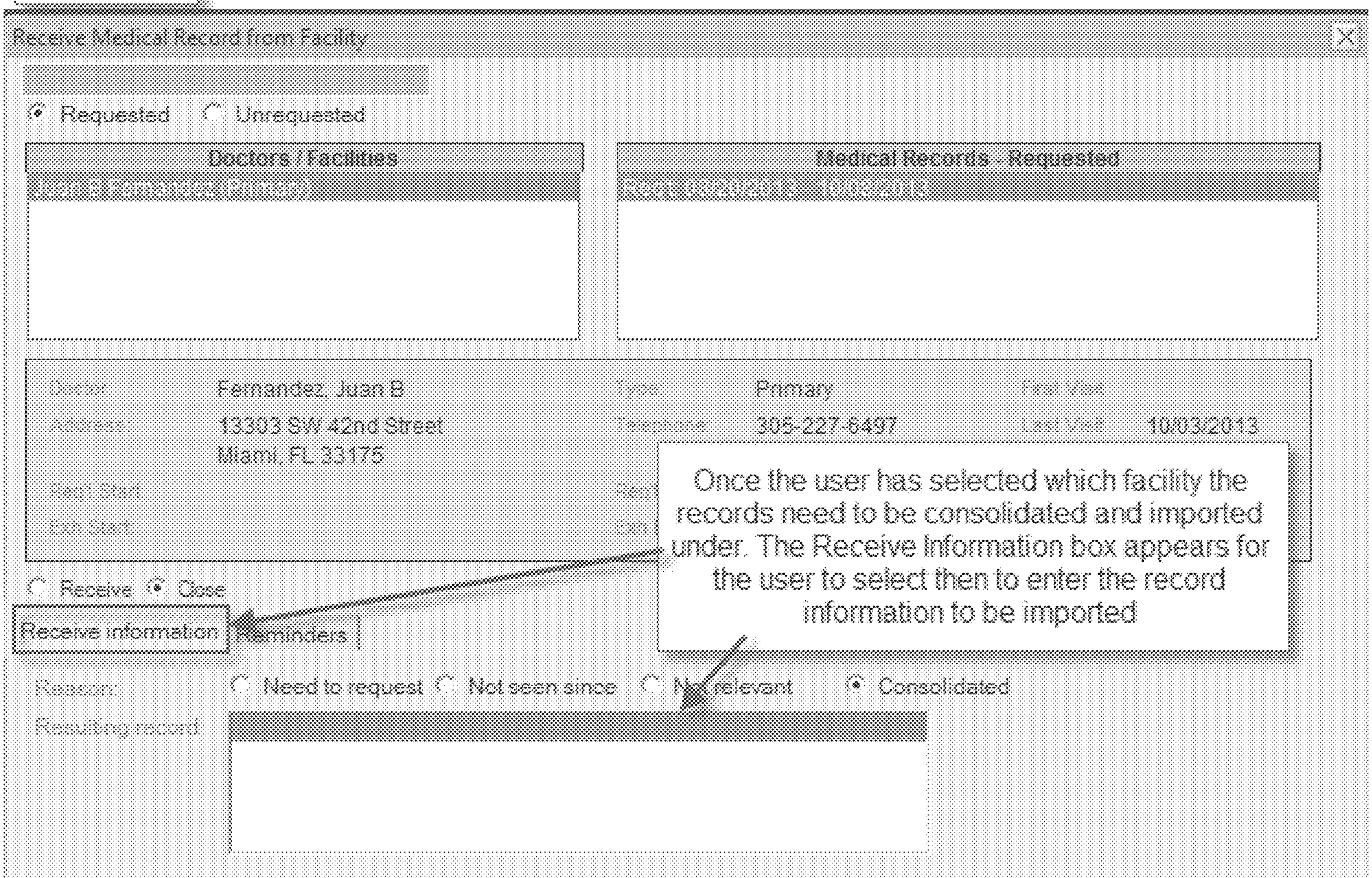

"Close" - Consolidated Option
Receive Close
Close information
Reminders
Reason:
Need to request
Not seen since
Not relevant
Consolidated
Resulting record:
Broward General Medical Center (Main) (Hospital), Requested, Req't
Save
Cancel
When the user selects the Consolidated option a "Resulting record" box appears
The Resulting record box shows a list of only open requests for facilities which the selected request can be consolidated into

Fig. 89

"Close" - Consolidated Option continued

Fig. 90



If the user selects Facility - Invoice this dialogue box will appear

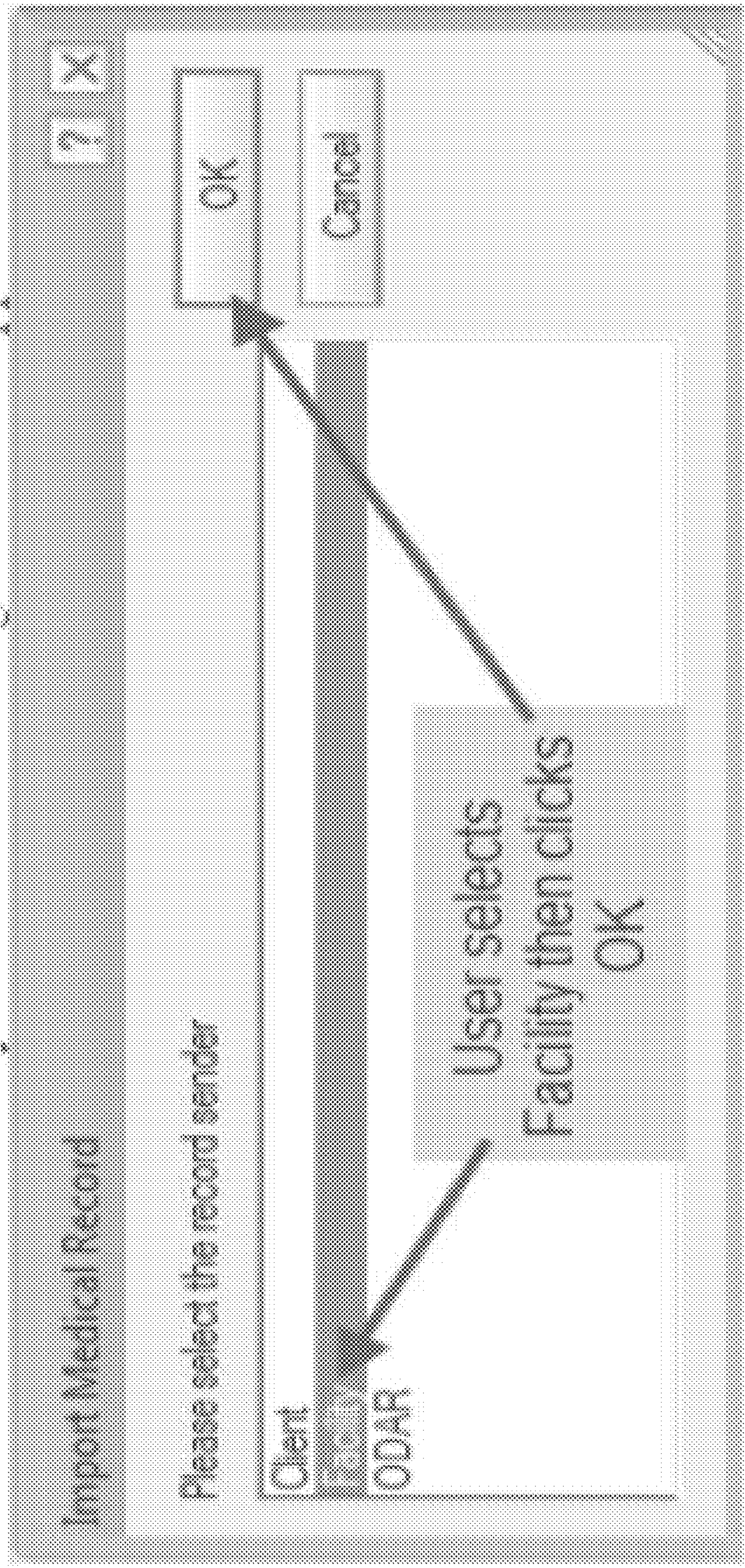


Fig. 91

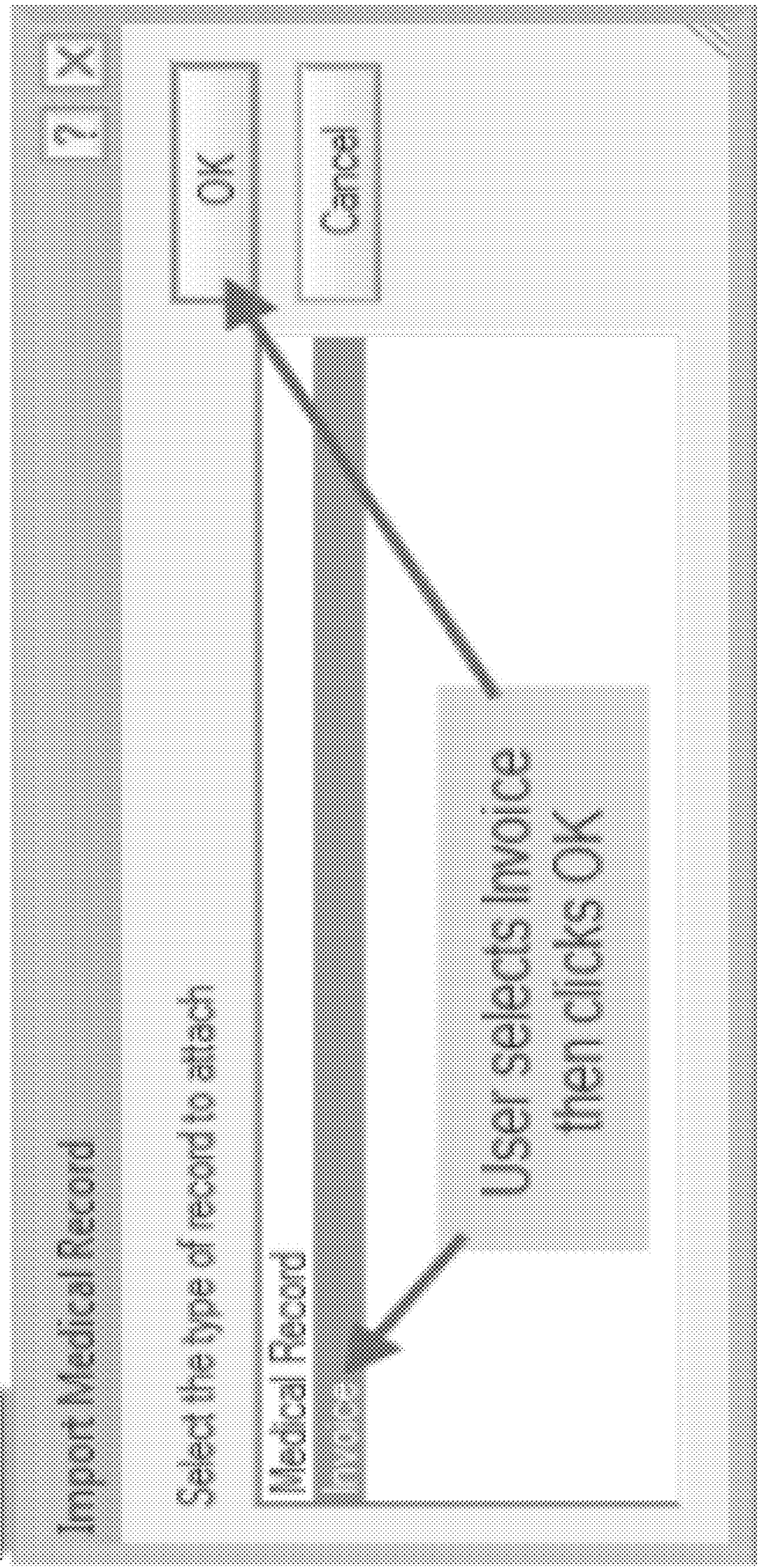

Import Medical Record
Select the type of record to attach
Medical Record
OK
Cancel
User selects Invoice
then clicks OK

Fig. 92

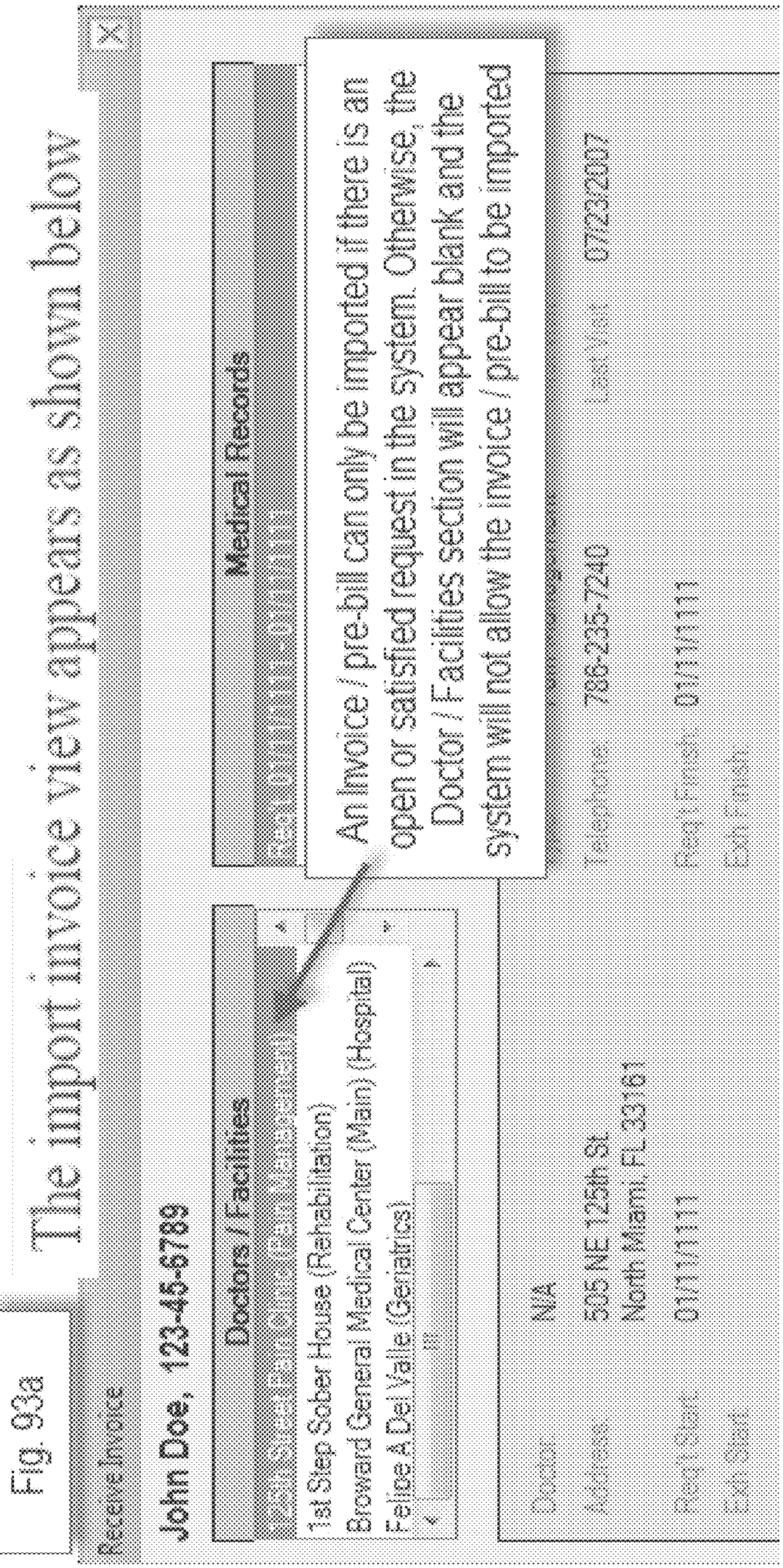

The import invoice view appears as shown below
Receive Invoice
John Doe, 123-45-6789
Doctors / Facilities
1st Step Sober House (Rehabilitation)
Broward General Medical Center (Main) (Hospital)
Felice A Del Valle (Geriatrics)
Medical Records
An Invoice / pre-bill can only be imported if there is an open or satisfied request in the system. Otherwise, the Doctor / Facilities section will appear blank and the system will not allow the invoice / pre-bill to be imported
Doctor NA
Address 505 NE 125th St
North Miami, FL 33161
Telephone 786-235-7240
Last Visit 07/23/2007
Req't Start 01/11/1111
Req't Finish 01/11/1111
Est Start
Est Finish

Fig. 93a

Fig. 93b

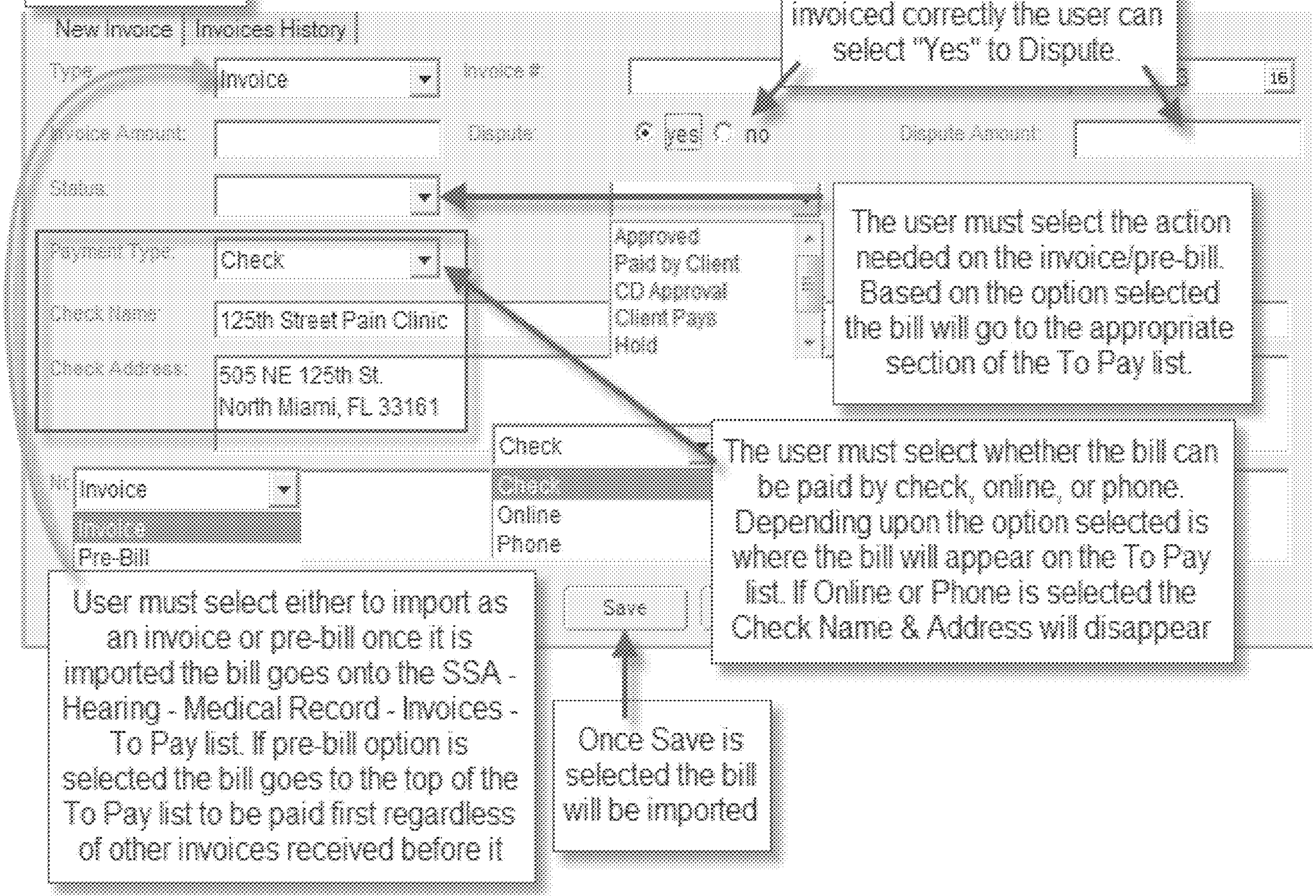

New Invoice | Invoices History |
Type
Invoice
Invoice #
Dispute
yes
no
Dispute Amount
Status
Approved
Paid by Client
CD Approval
Client Pays
Hold
Payment Type
Check
Check Name
125th Street Pain Clinic
Check Address
505 NE 125th St.
North Miami, FL 33161
Check
Online
Phone
Invoice
Pre-Bill
Save
If an invoice/pre-bill was not invoiced correctly the user can select "Yes" to Dispute.
The user must select the action needed on the invoice/pre-bill. Based on the option selected the bill will go to the appropriate section of the To Pay list.
The user must select whether the bill can be paid by check, online, or phone. Depending upon the option selected is where the bill will appear on the To Pay list. If Online or Phone is selected the Check Name & Address will disappear
User must select either to import as an invoice or pre-bill once it is imported the bill goes onto the SSA - Hearing - Medical Record - Invoices - To Pay list. If pre-bill option is selected the bill goes to the top of the To Pay list to be paid first regardless of other invoices received before it
Once Save is selected the bill will be imported

Fig 94

Section 3 — If the user selects the ODAR option this dialog will appear.

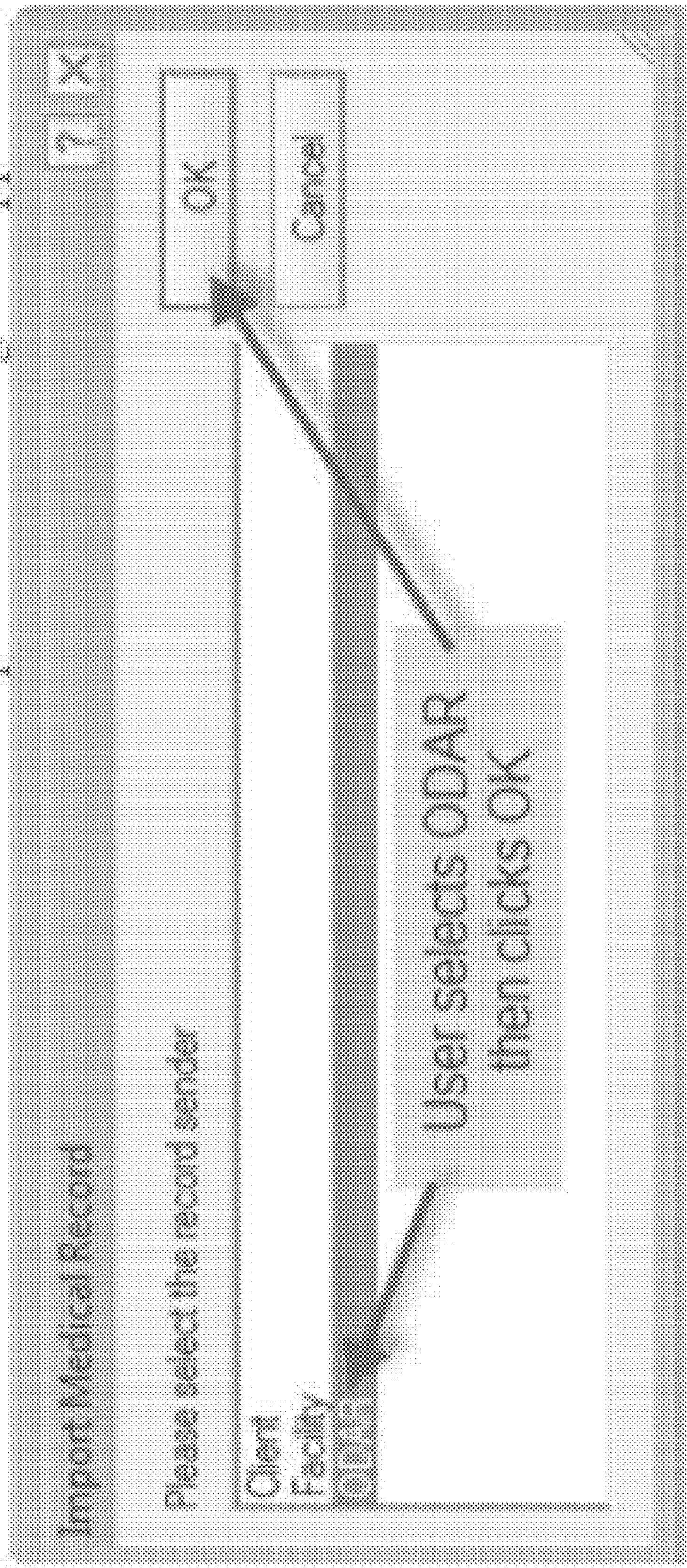


Fig. 95

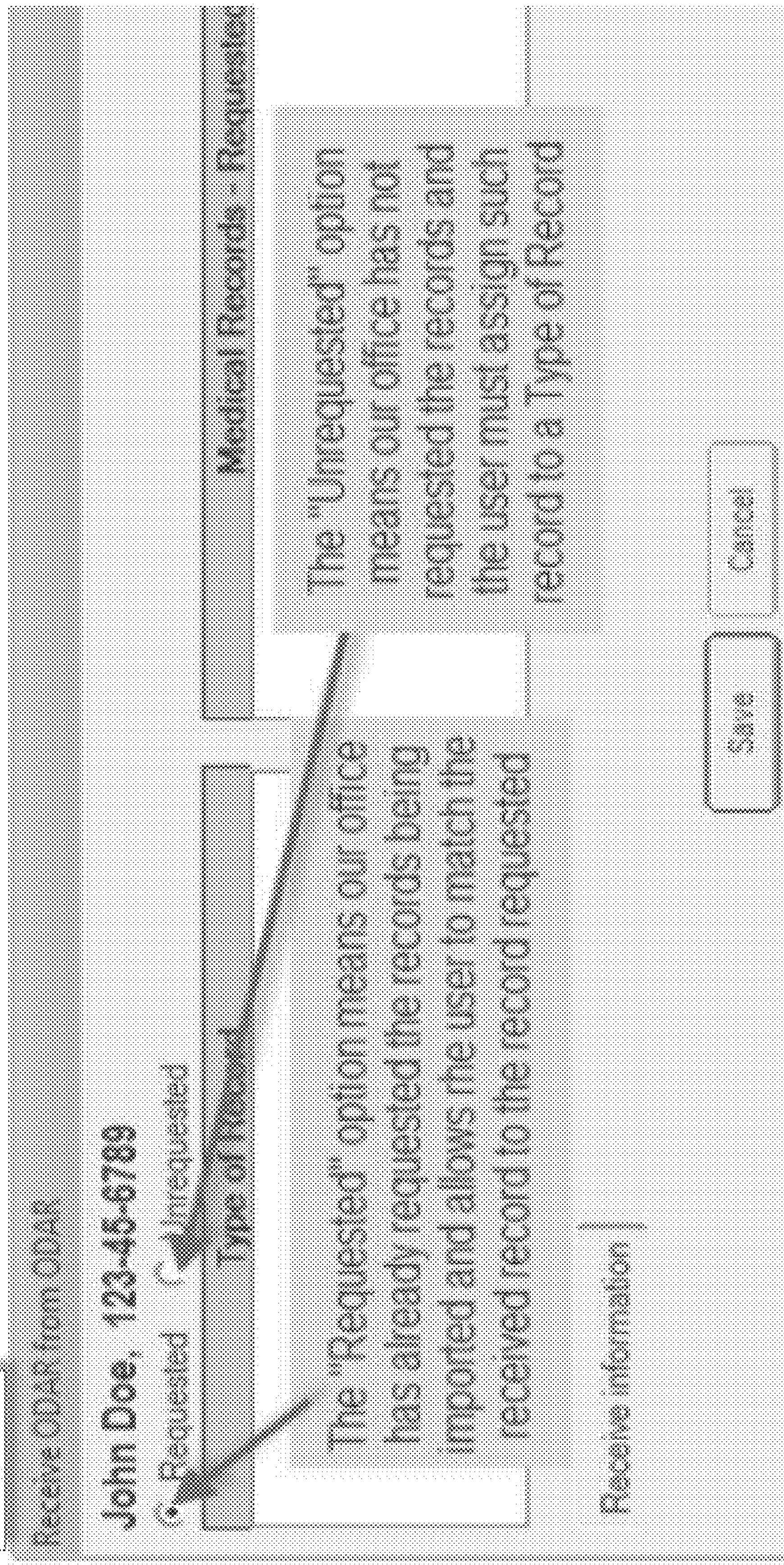

John Doe, 123-45-6789
Requested
Unrequested
Type of Record
Medical Records - Requeste
The "Requested" option means our office has already requested the records being imported and allows the user to match the received record to the record requested
The "Unrequested" option means our office has not requested the records and the user must assign such record to a Type of Record
Receive information
Save
Cancel

Fig. 96

When selecting the "Unrequested" option the following dialogue appears.

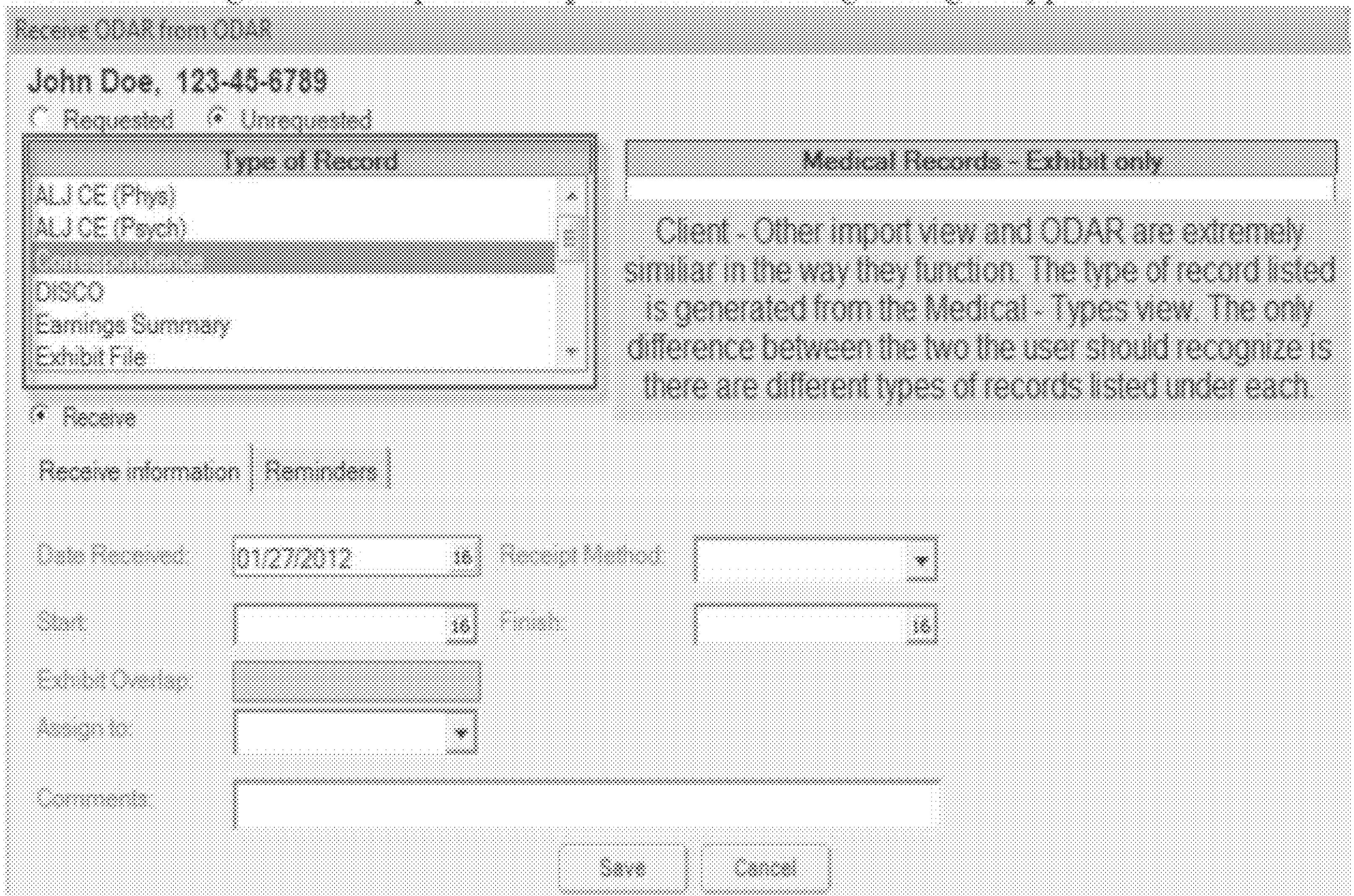


Fig. 97

Collections

To access the "Collections" Import Wizard the user selects Import > "Collections".

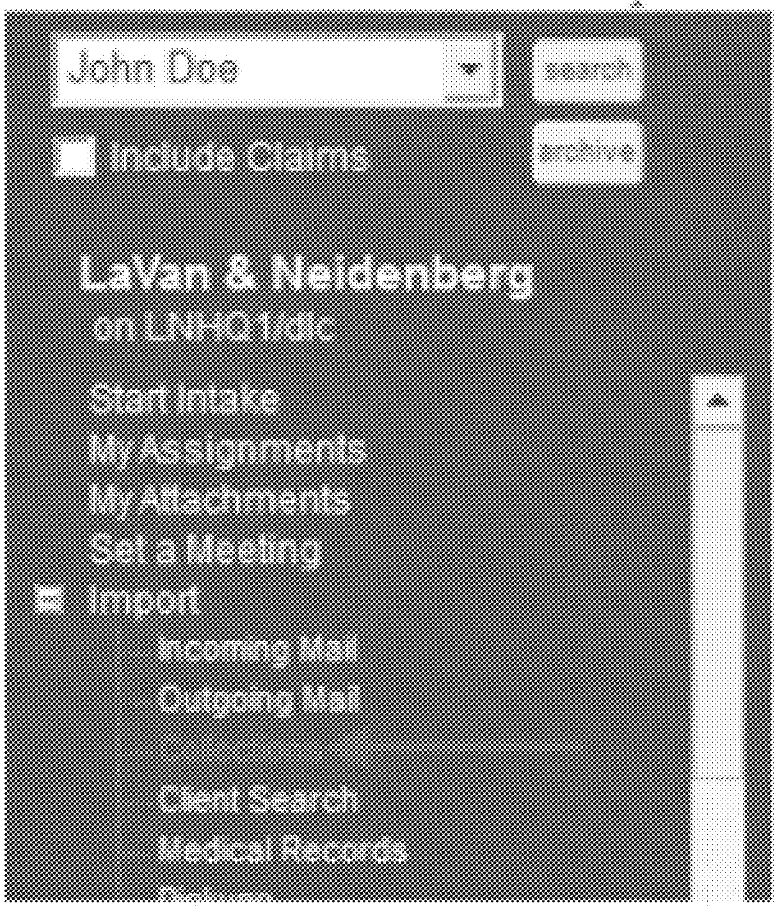


Fig. 98

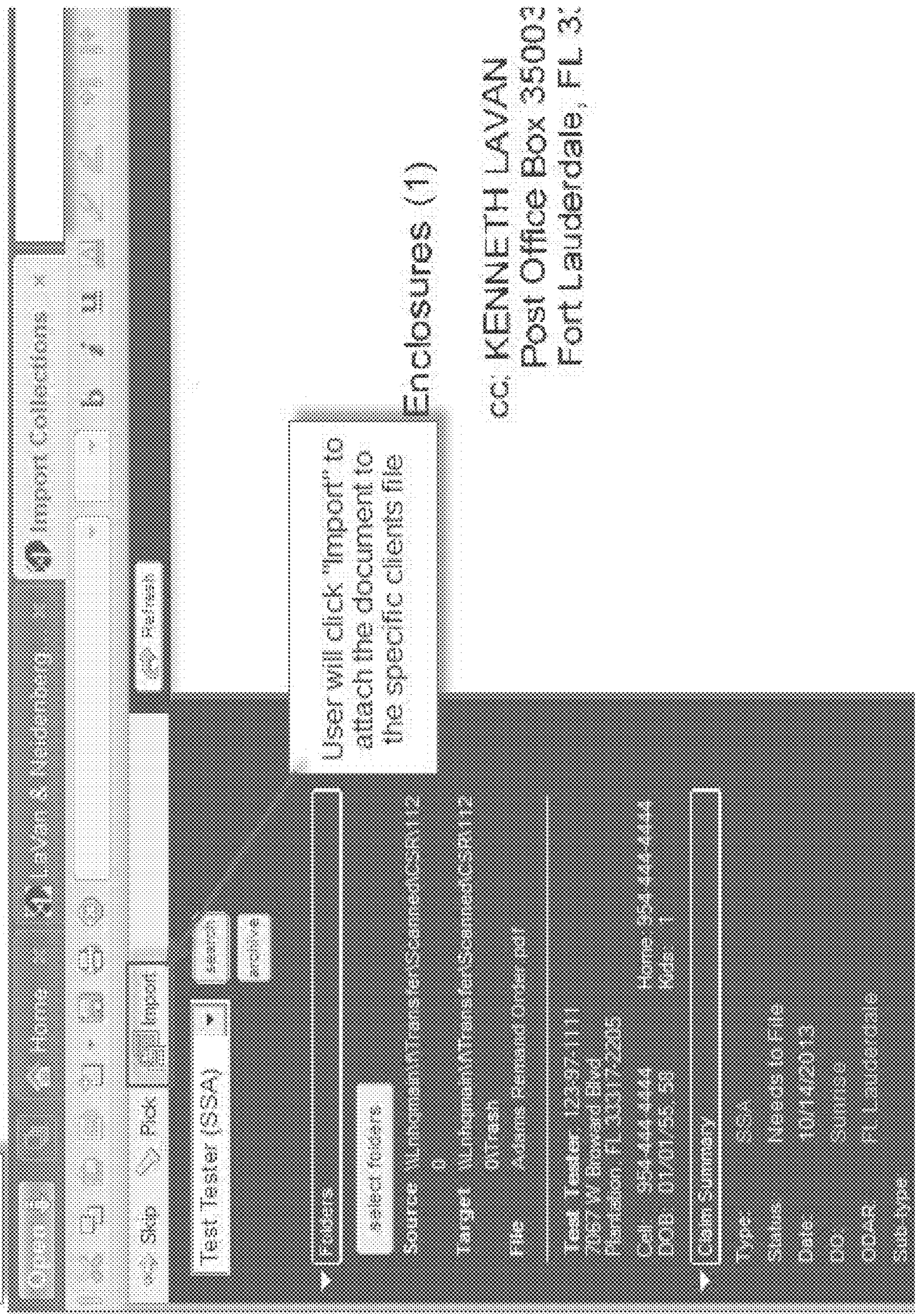

Home
Import Collections
Refresh
Skip
Pick
Import
Test Tester (SSA)
search
archive
Folders
select folders
User will click "Import" to attach the document to the specific clients file
Enclosures (1)
cc: KENNETH LAVAN
Claim Summary
Type
Status
Needs to File
Date
10/14/2013
Sunrise

Fig. 99

After clicking "Import" the following dialogue appears.

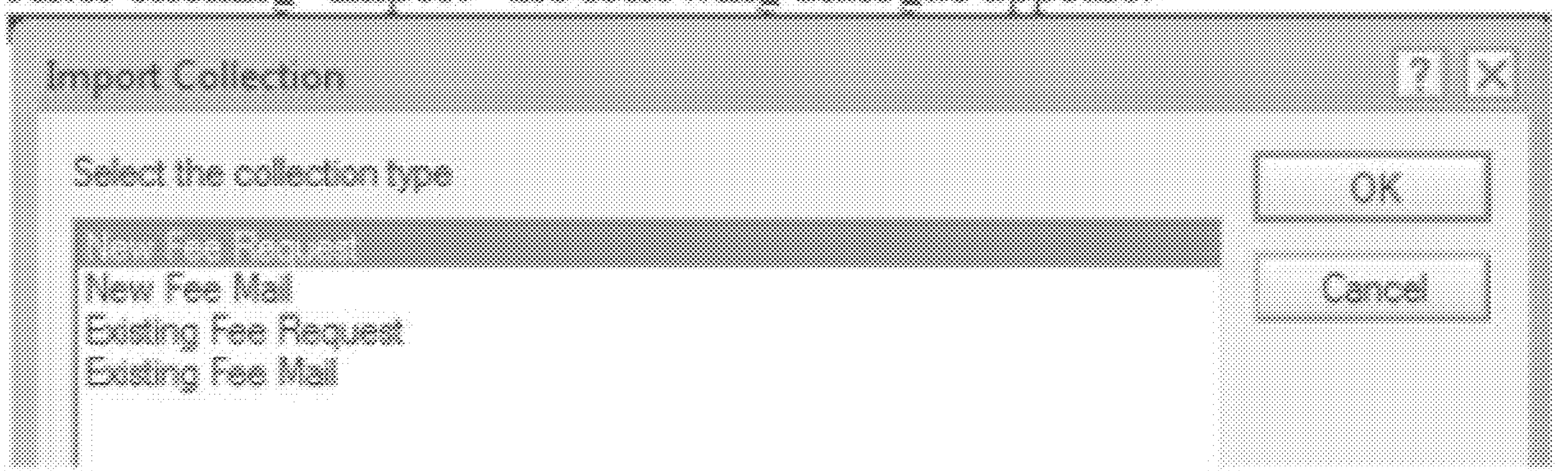


Fig. 100

Based on what the user selects a second dialogue will appear – an explanation of each is shown below:

If "**New Fee Request**" is selected the following dialogue appears.

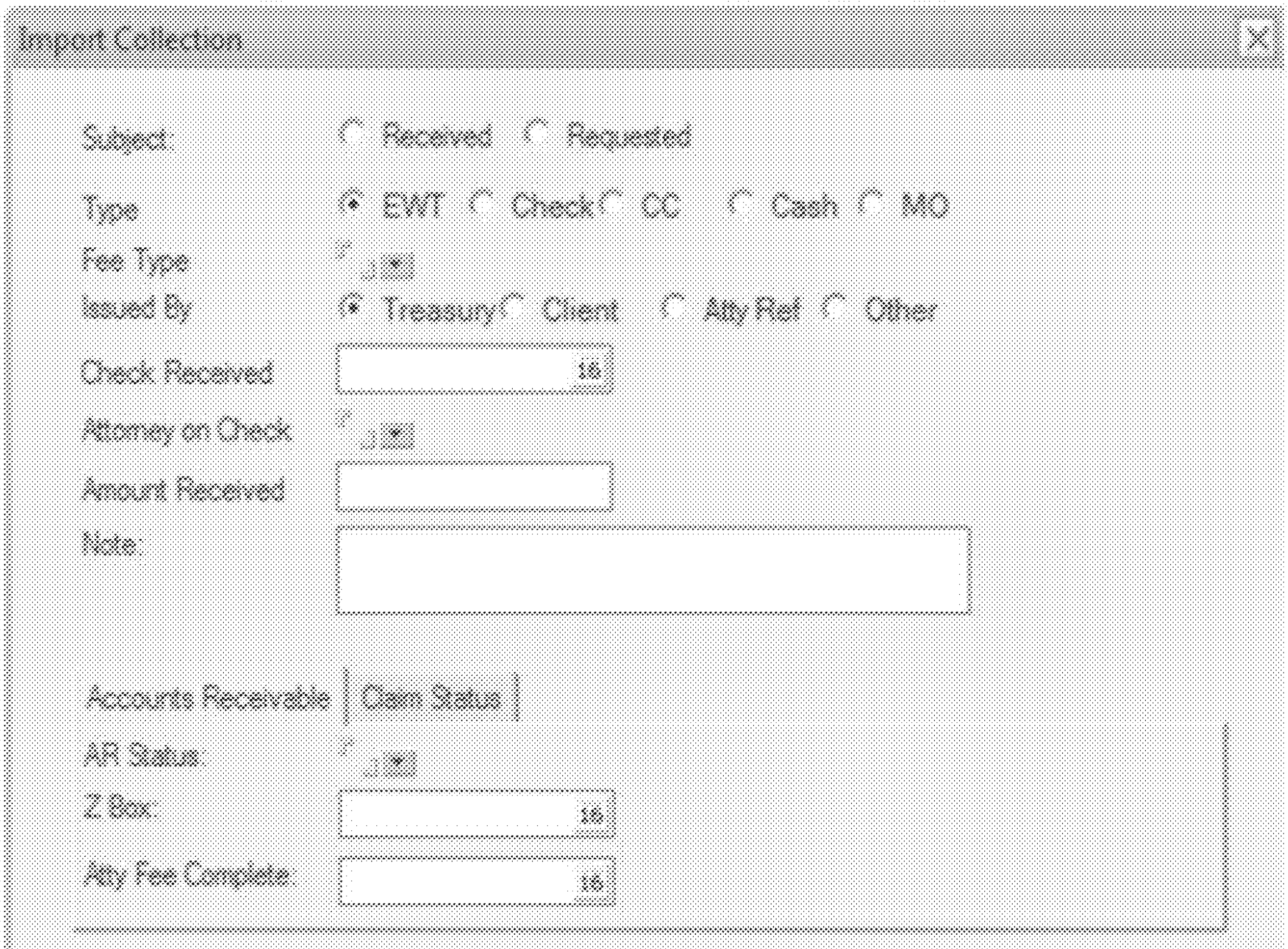


Fig. 101

The following print screens will breakdown the dialogue explaining it in 4 sections:

Section 1: User selects the Subject, Type, Fee Type Issued By, and the Check Received date.

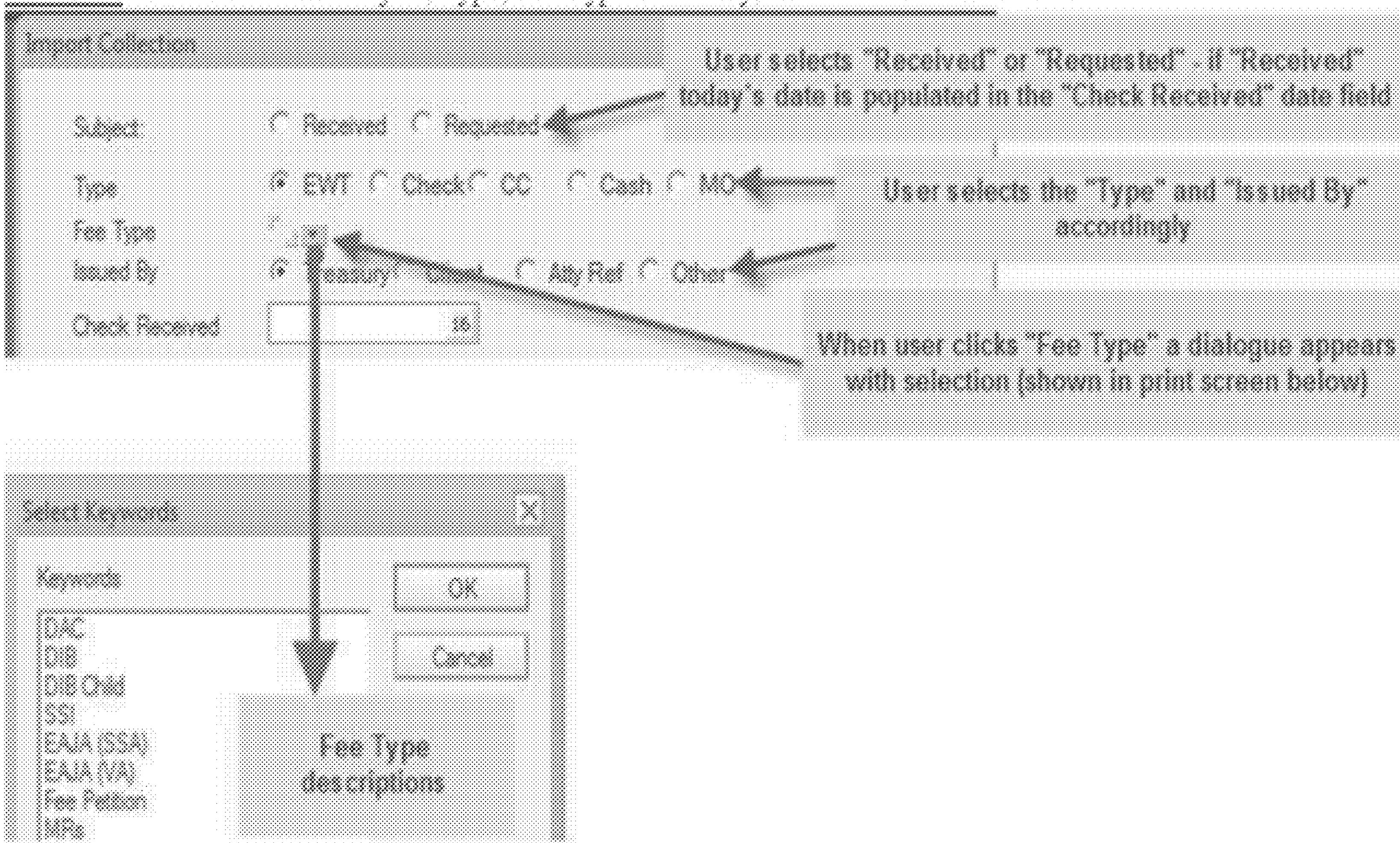


Fig. 102

Section 2: User selects the attorney's name that appears on the check, enters the amount and a note if necessary

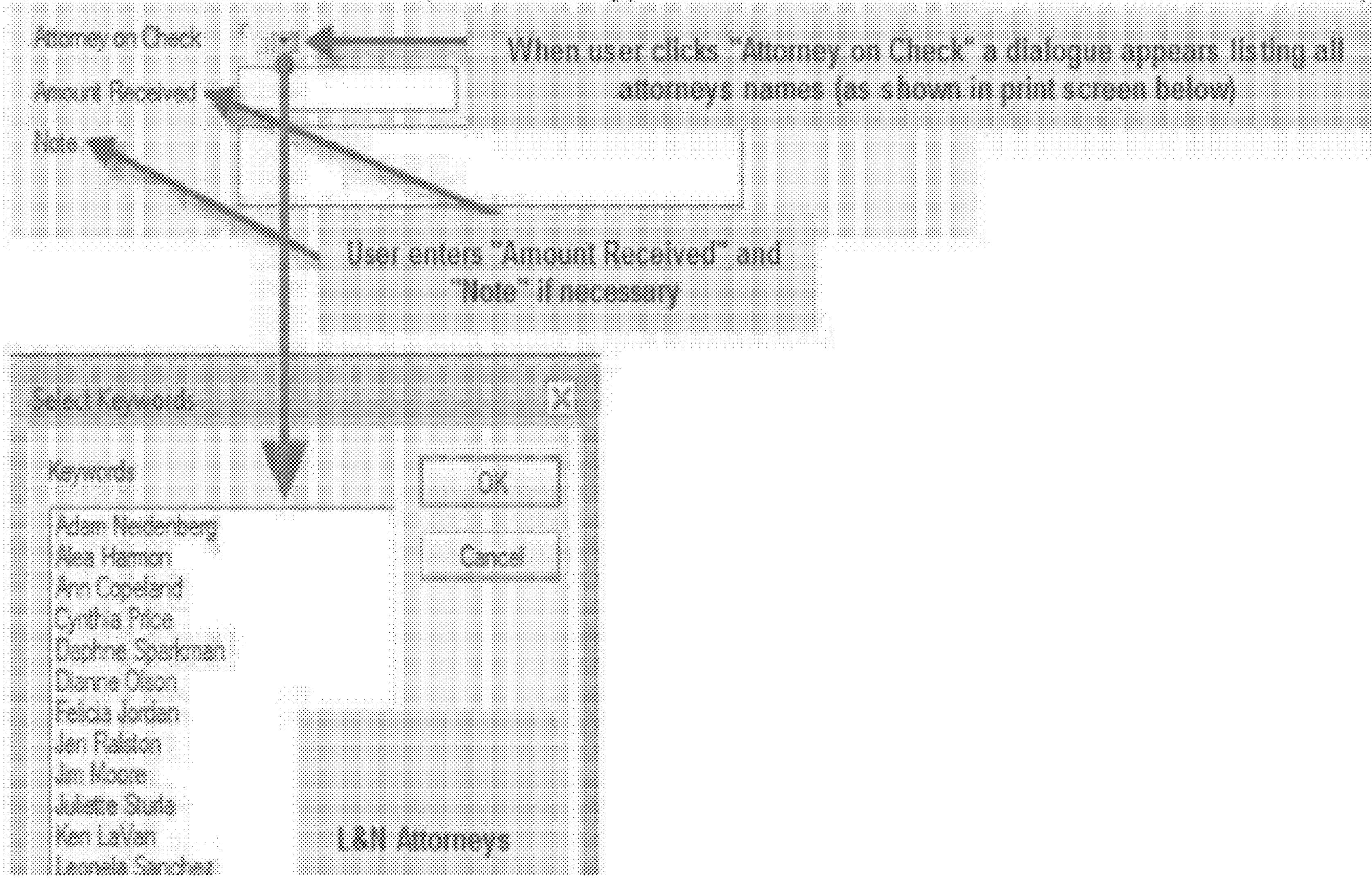


Fig. 103

Section 3: User selects the AR Status and completes the date fields

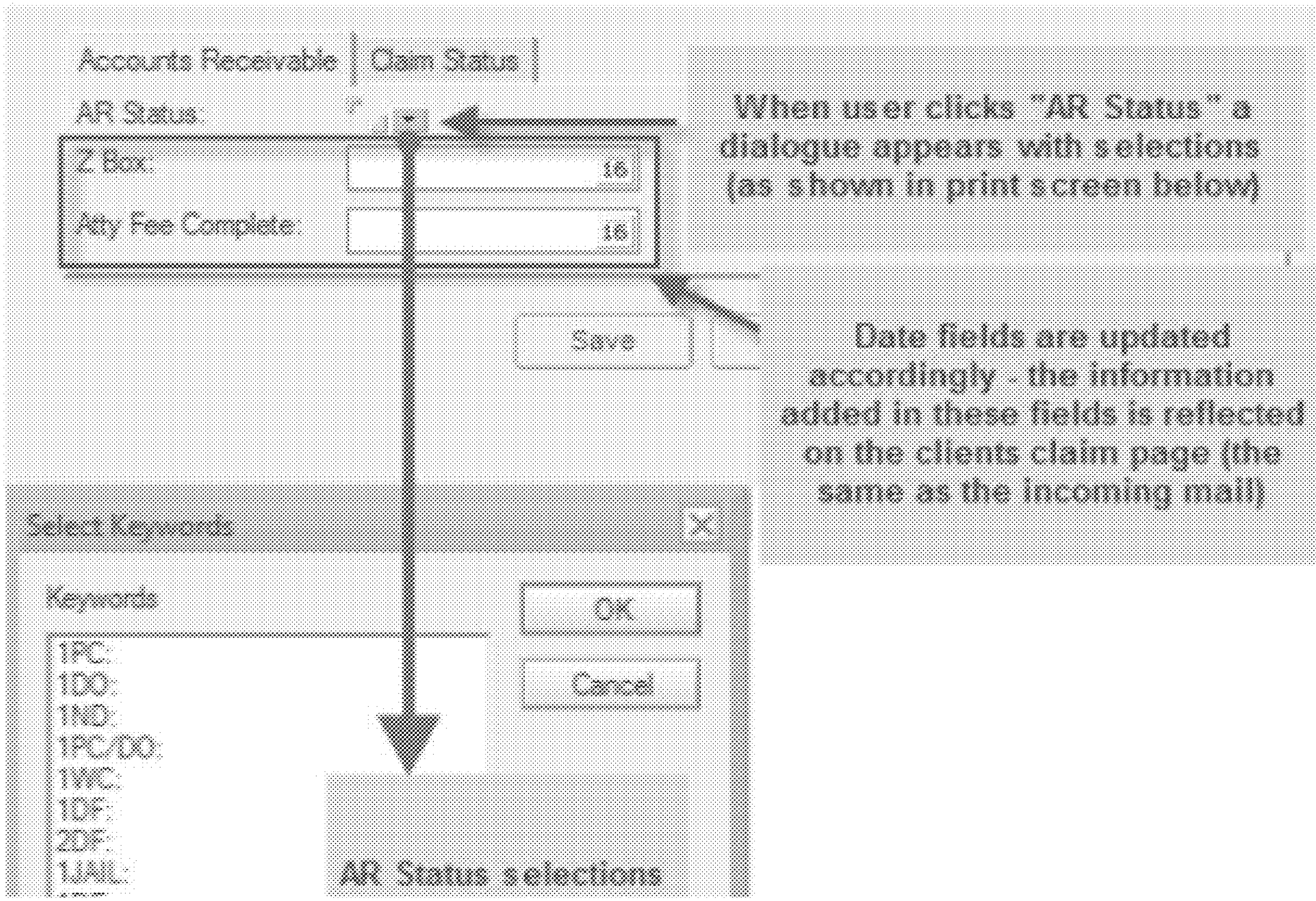
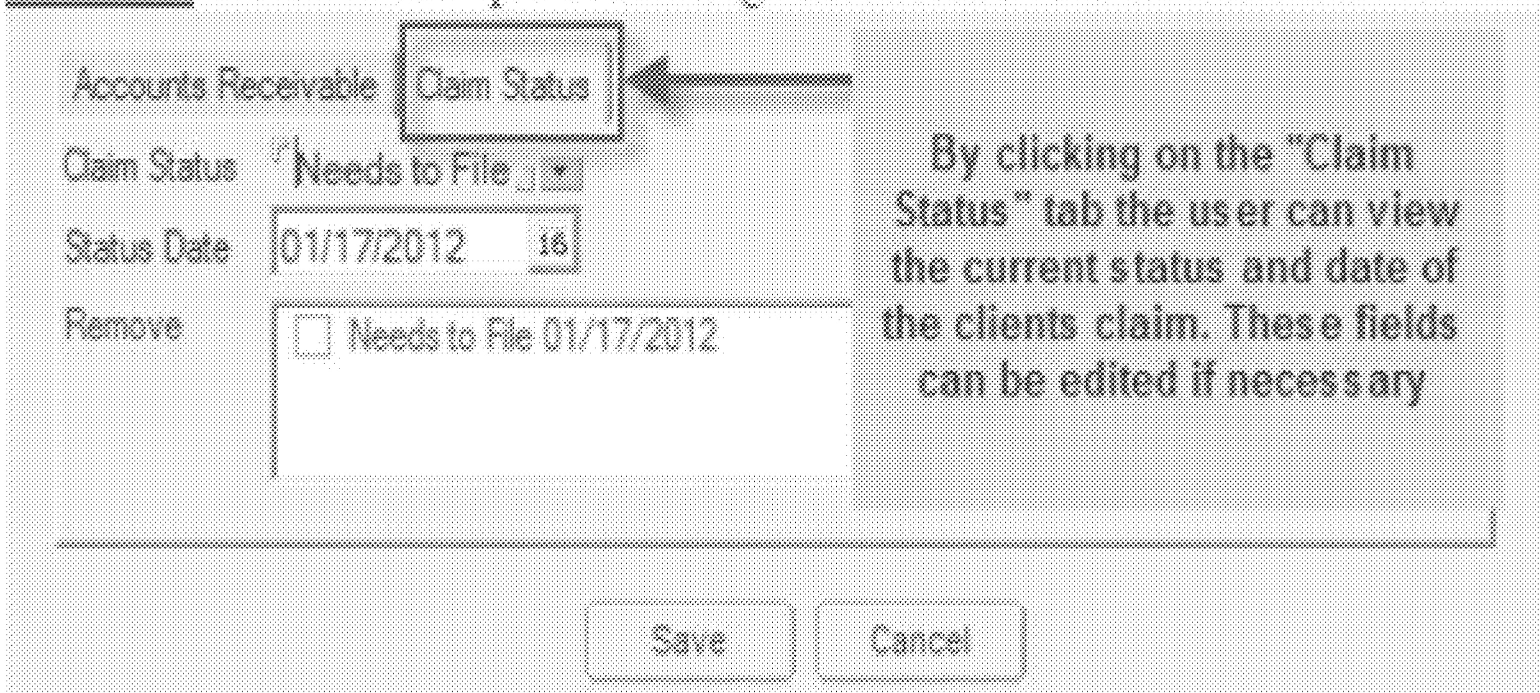


Fig. 104

Section 4: User has the option to change the client's status and/or status date if necessary



If "New Fee Mail" is selected, the following dialogue appears.

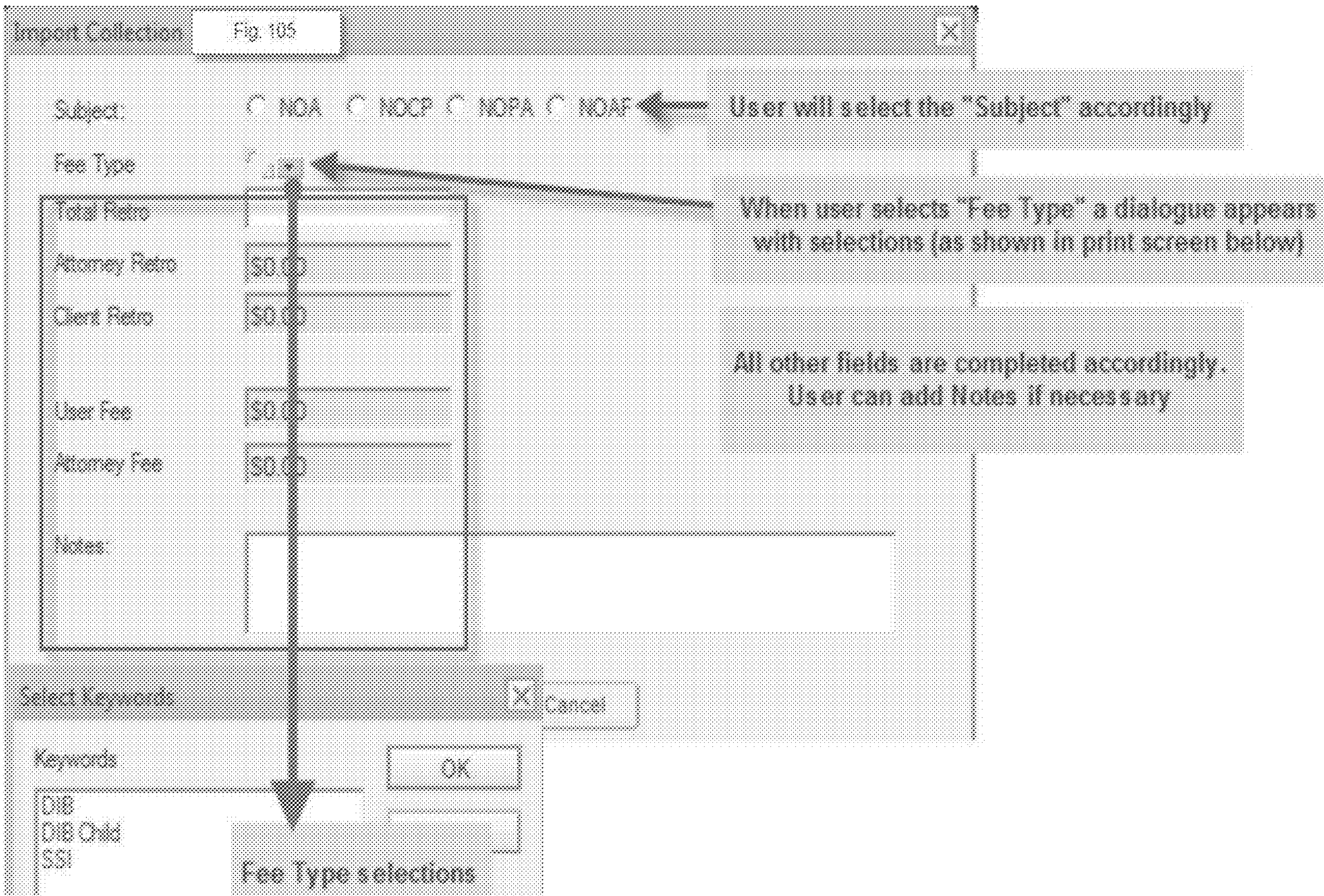


Fig. 106

"Existing Fee Request"

This corresponds with the first Collections import option - **"New Fee Request"**

Once a **"New Fee Request"** is imported additional things can be added to it later using this importing option

Fig. 107

"Existing Fee Mail"

This corresponds with the first Collections import option - **"New Fee Mail"**

Once a **"New Fee Mail"** is imported additional things can be added to it later using this importing option

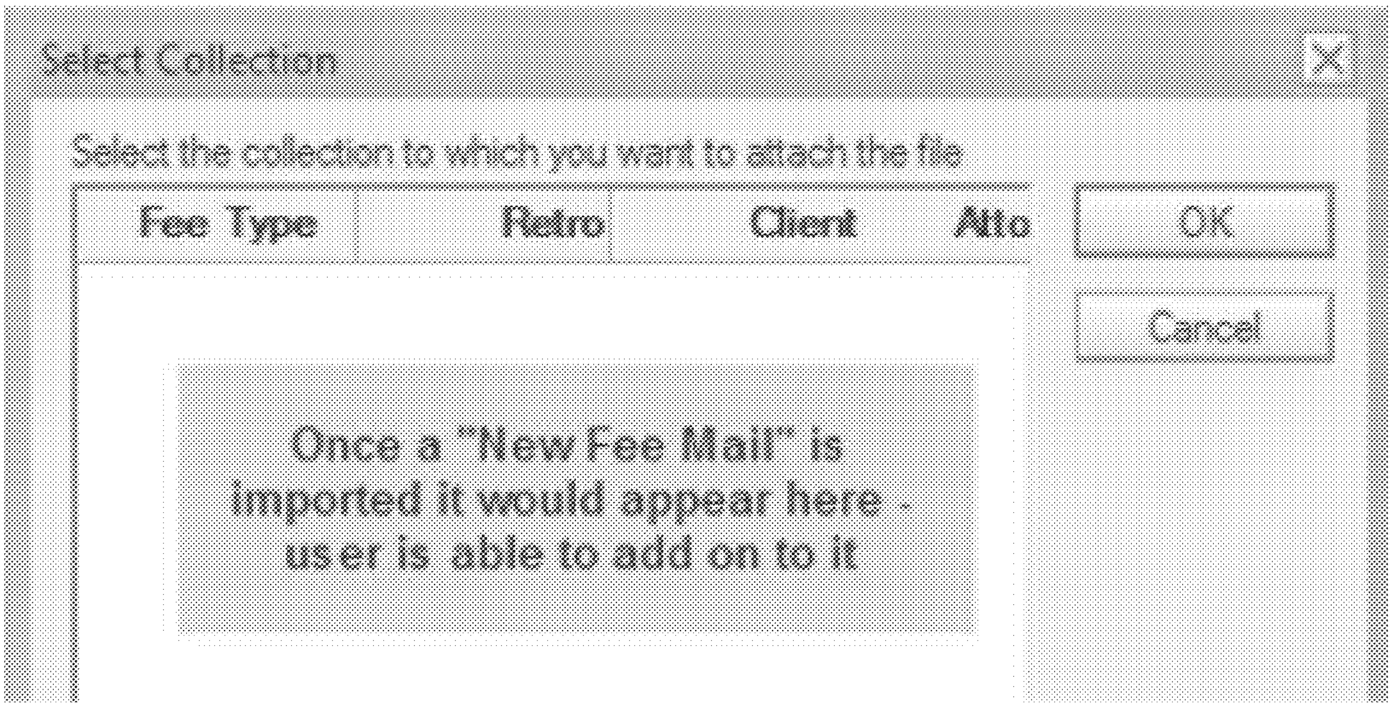


Fig. 108

Locator Module

The Locator Module systematically assigns various government agencies, offices, and staff members to the clients' file. The Locator analyzes the clients' State, Zip Code, and Social Security Number. Specifically, if the claim is a Veterans Claim, the Regional Office (RO) is assigned. If it is a Social Security Disability Claim the District Office (DO), Disability Determination Service (DDS), and Office of Disability Adjudication & Review (ODAR) are assigned. In addition, the Social Security Administration (SSA) unit that pays the client benefits and the attorney fees once a person is found disabled uses the built in analytics to determine the appropriate unit (Mod or Payment Center (PC)). In addition, the views in the databases organize the groups of clients that have received favorable decisions by Mod or PC.

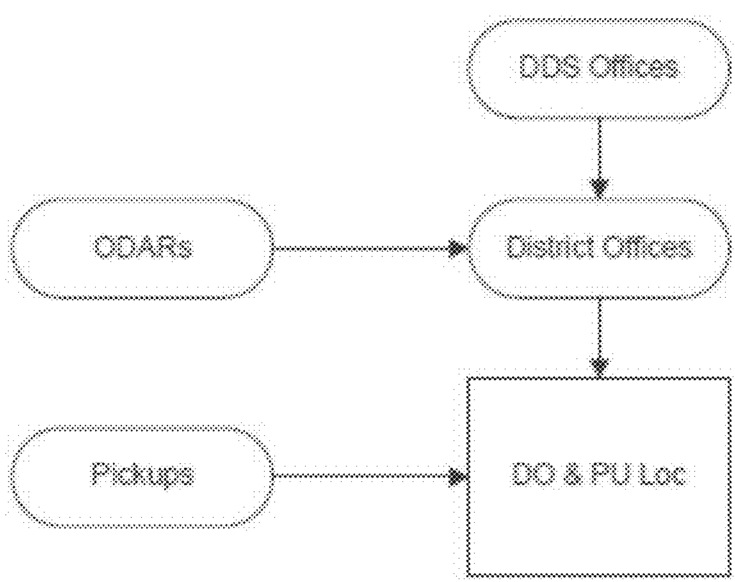
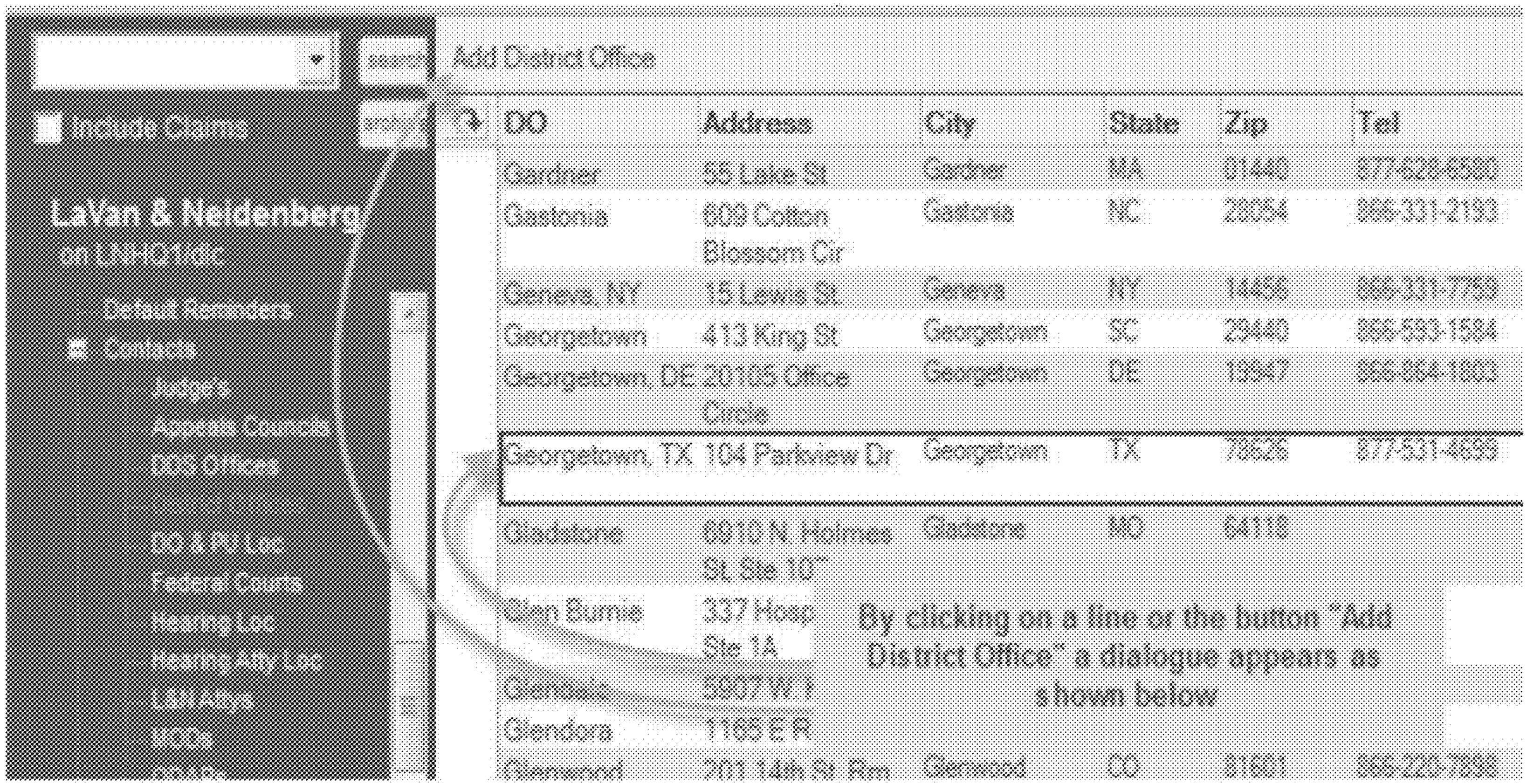


Fig. 109

The print screens below show how all components from the flow chart are linked together and associated with each client's file, allowing the system to automatically assign each component to the clients' file.

This view identifies all of the SSA Do's in the country:



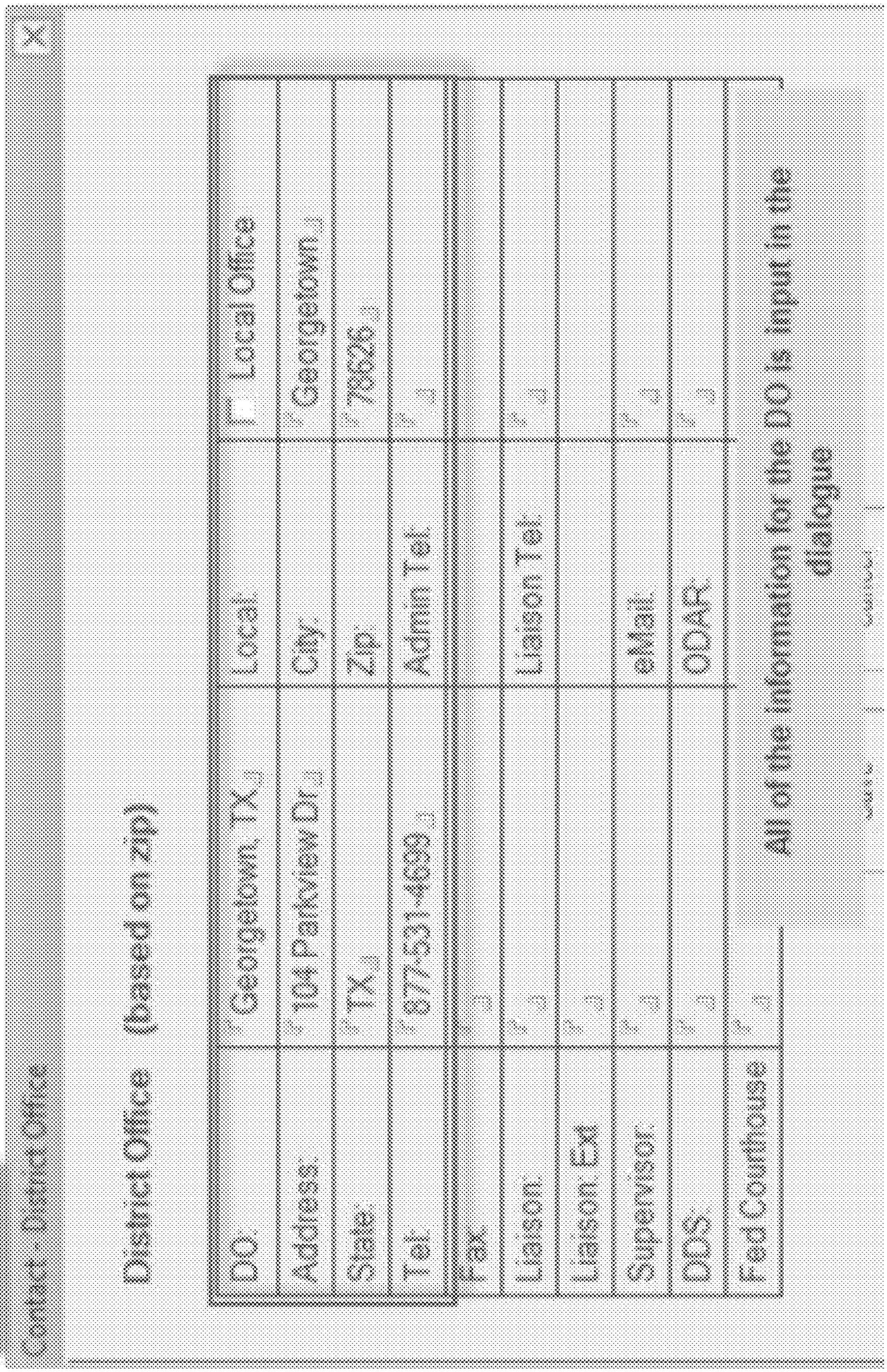

Contact - District Office
District Office (based on zip)
DO:
Georgetown, TX
Local:
Local Office
Address:
104 Parkview Dr.
City:
Georgetown
State:
TX
Zip:
78626
Tel:
877-531-4699
Admin Tel:
Fax:
Liaison:
Liaison Tel:
Liaison Ext:
Supervisor:
eMail:
DDS:
ODAR:
Fed Courthouse
All of the information for the DO is input in the dialogue

Fig 110

Fig. 111

This view identifies all o the DDS offices in the country:

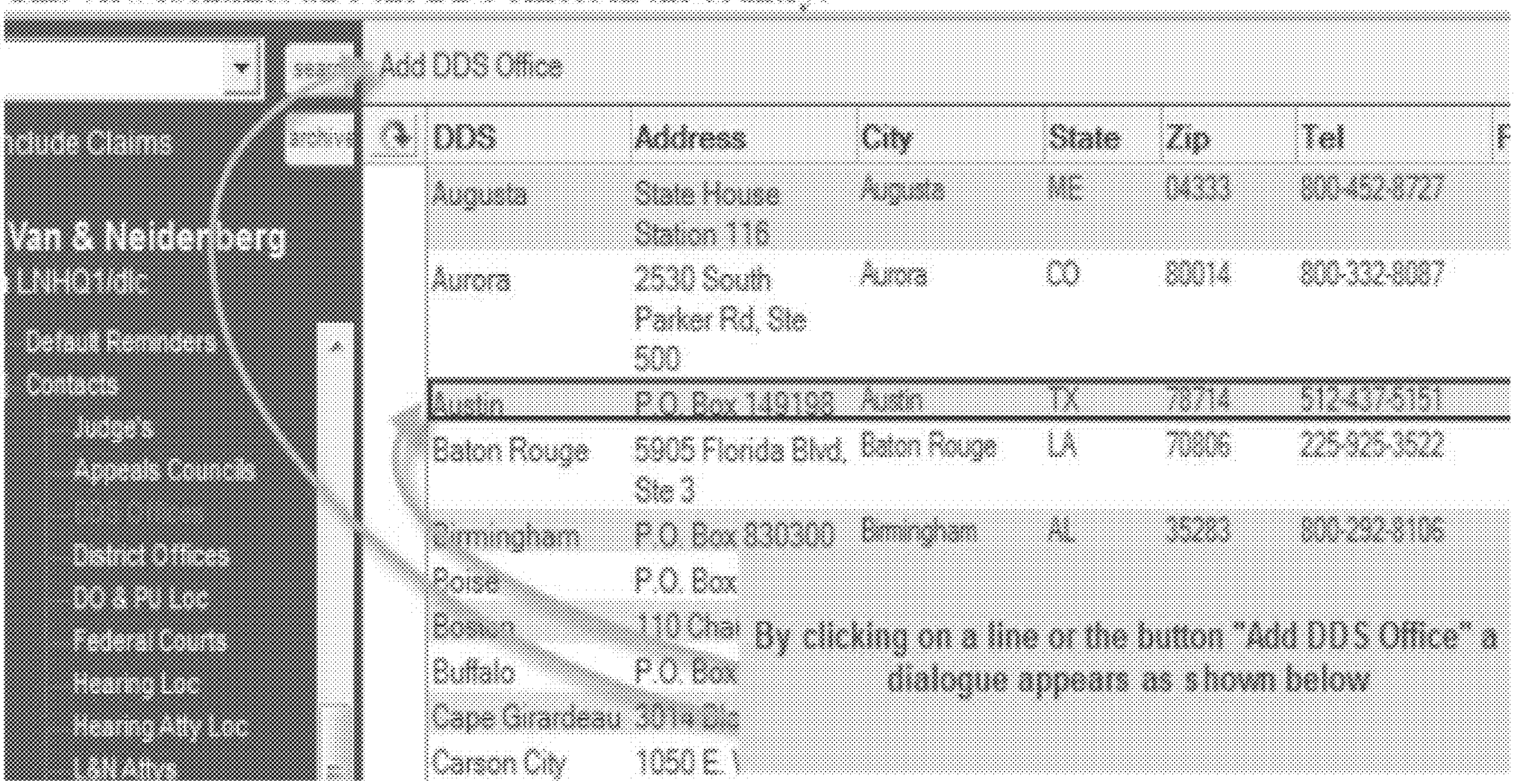


Fig. 112

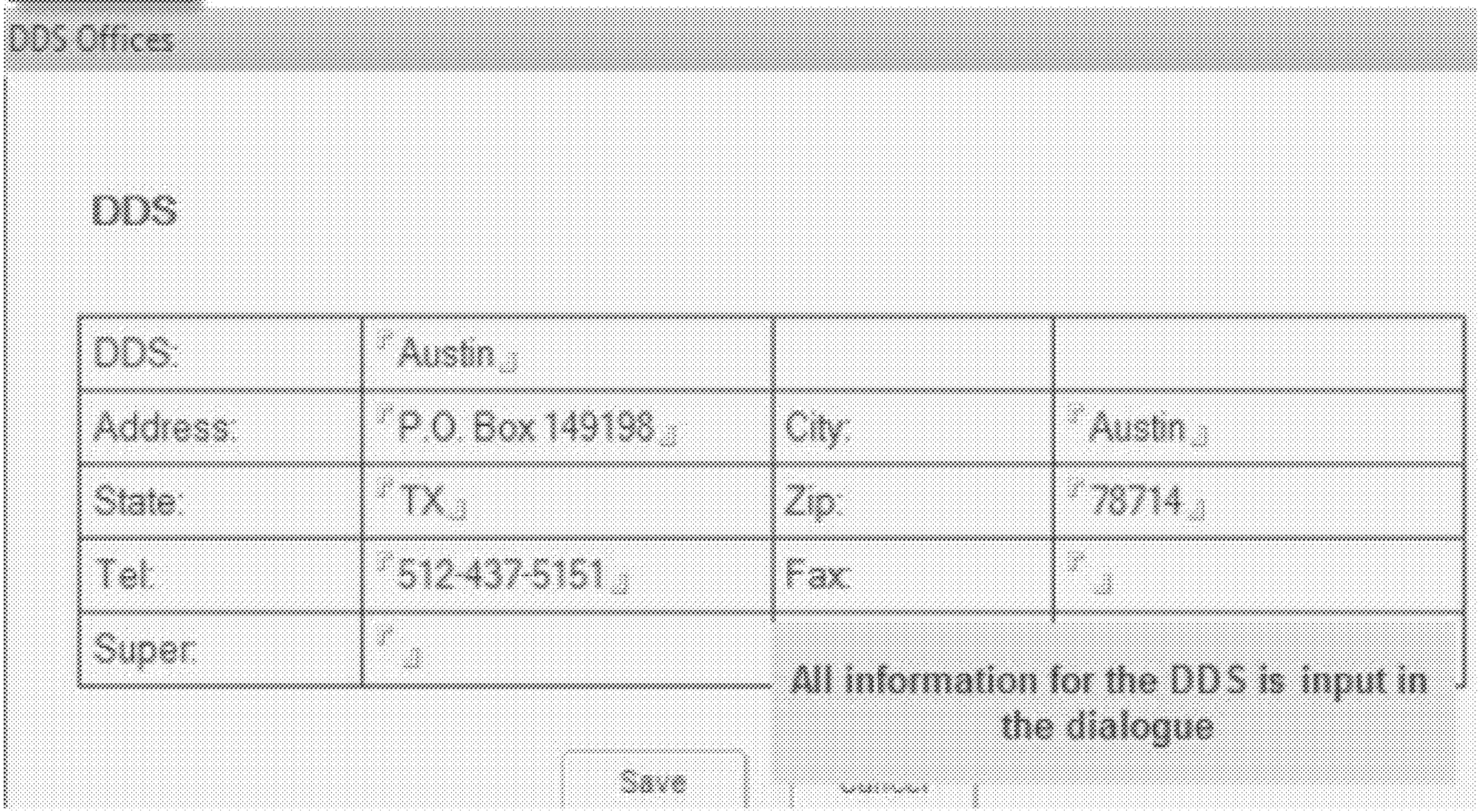

DDS Offices
DDS
DDS: Austin
Address: P.O. Box 149198
City: Austin
State: TX
Zip: 78714
Tel: 512-437-5151
Fax:
Super:
All information for the DDS is input in the dialogue
Save

Fig. 113

The DDS name is then added to the DO dialogue:

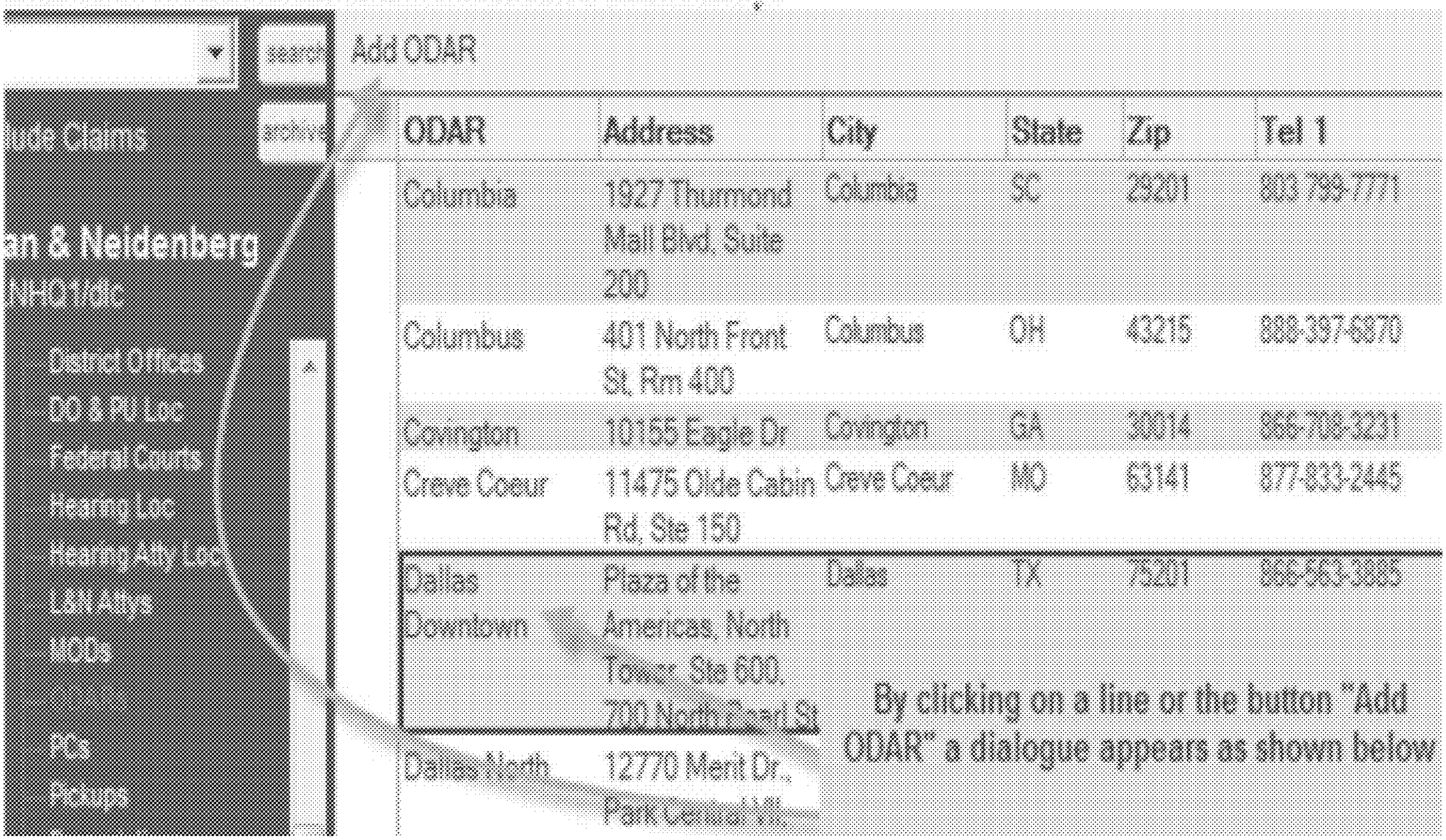
Contact - District Office

District Office (based on zip)

DO:	Georgetown, TX	Local:	Local Office
Address:	104 Parkview Dr	City:	Georgetown
State:	TX	Zip:	78626
Tel:	877-531-4699	Admin Tel:	
Fax:			
Liaison:		Liaison Tel:	
Liaison: Ext			
Supervisor:		eMail:	
DDS:	Austin	ODAR:	
Fed Courthouse			

Fig. 114

This view identifies all of the ODAR's in the country:



By clicking on a line or the button "Add ODAR" a dialogue appears as shown below

Contact ODAR

Fig. 115

ODAR

ODAR:	Dallas Downtown		
Address:	Plaza of the Americas, North Tower, Ste 600, 700 North Pearl St	City:	Dallas
State:	TX	Zip:	75201
Tel 1:	866-563-3885	Tel 2:	
Fax:	214-880-9869	eFax:	214-880-9800
Chief ALJ First:		[illegible]	
HOD First:			

All information for the ODAR is input in the dialogue

Fig. 116

The ODAR name is then added to the DO dialogue:

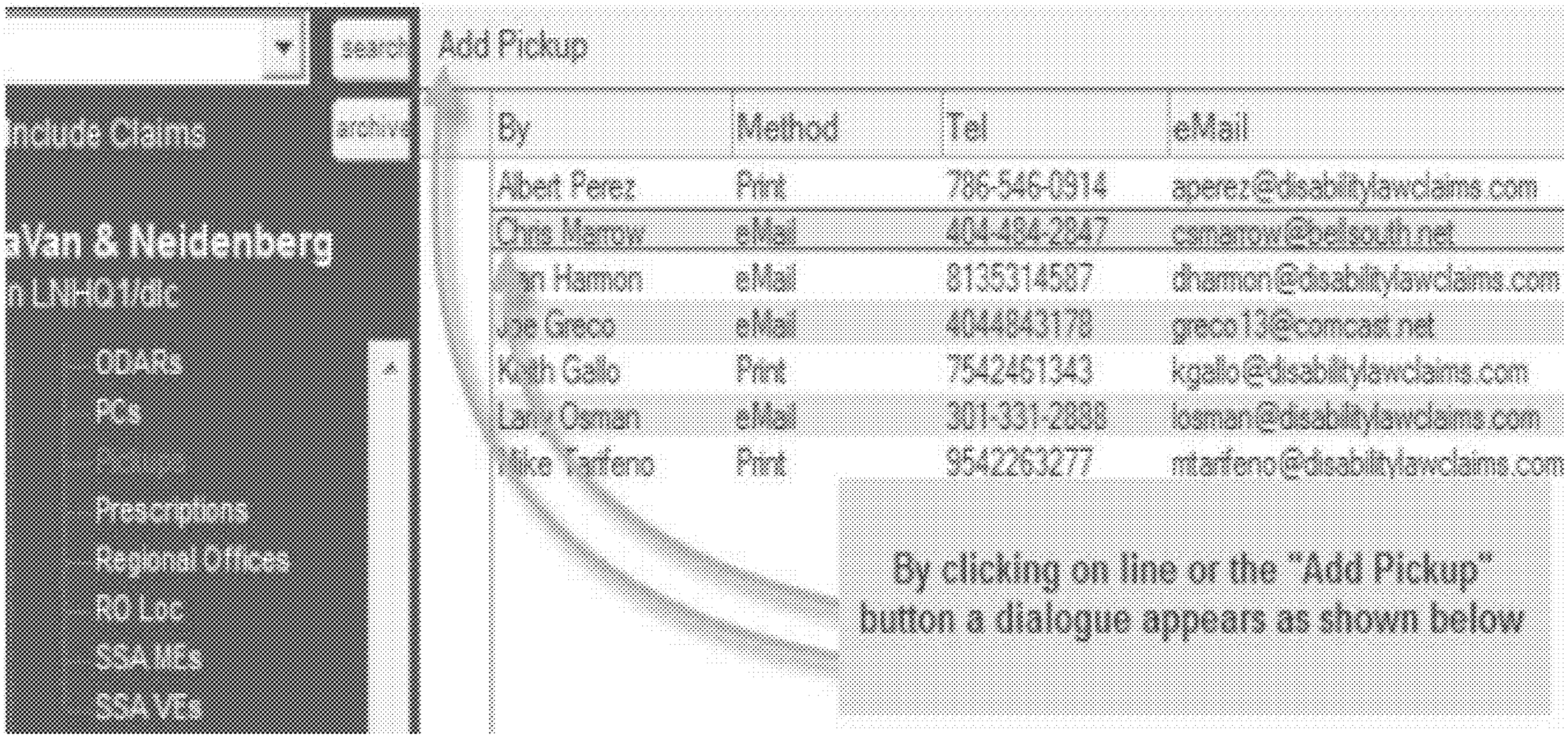
Contact - District Office

District Office (based on zip)

DO:	Georgetown, TX	Local:	Local Office
Address:	104 Parkview Dr	City:	Georgetown
State:	TX	Zip:	78626
Tel:	877-531-4699	Admin Tel:	
Fax:			
Liaison:		Liaison Tel:	
Liaison: Ext			
Supervisor:		eMail:	
DDS:	Austin	ODAR:	Dallas Downtown
Fed Courthouse			

Fig. 117

This view identifies all of the staff members that will be assigned to the clients' case based on their zip code:



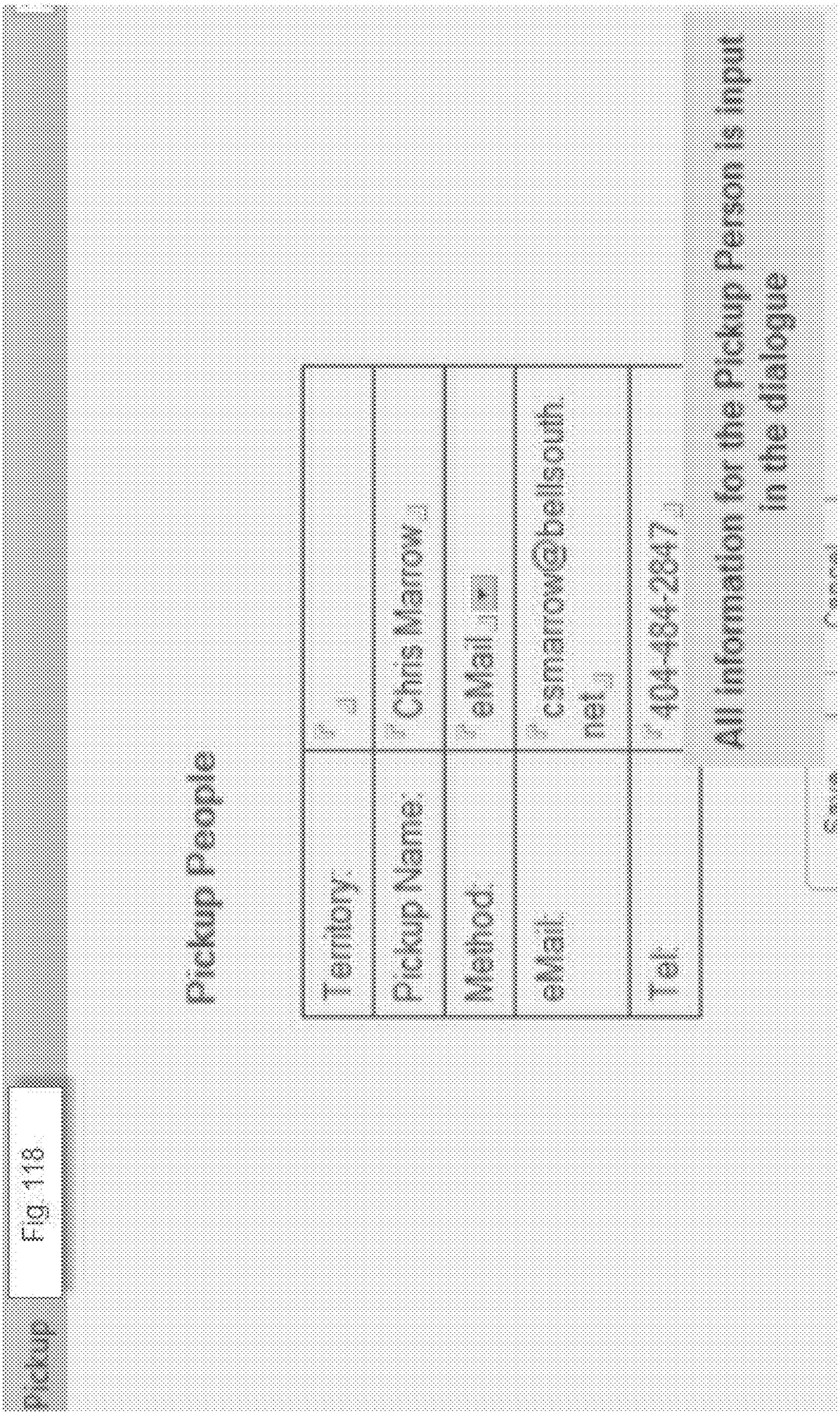
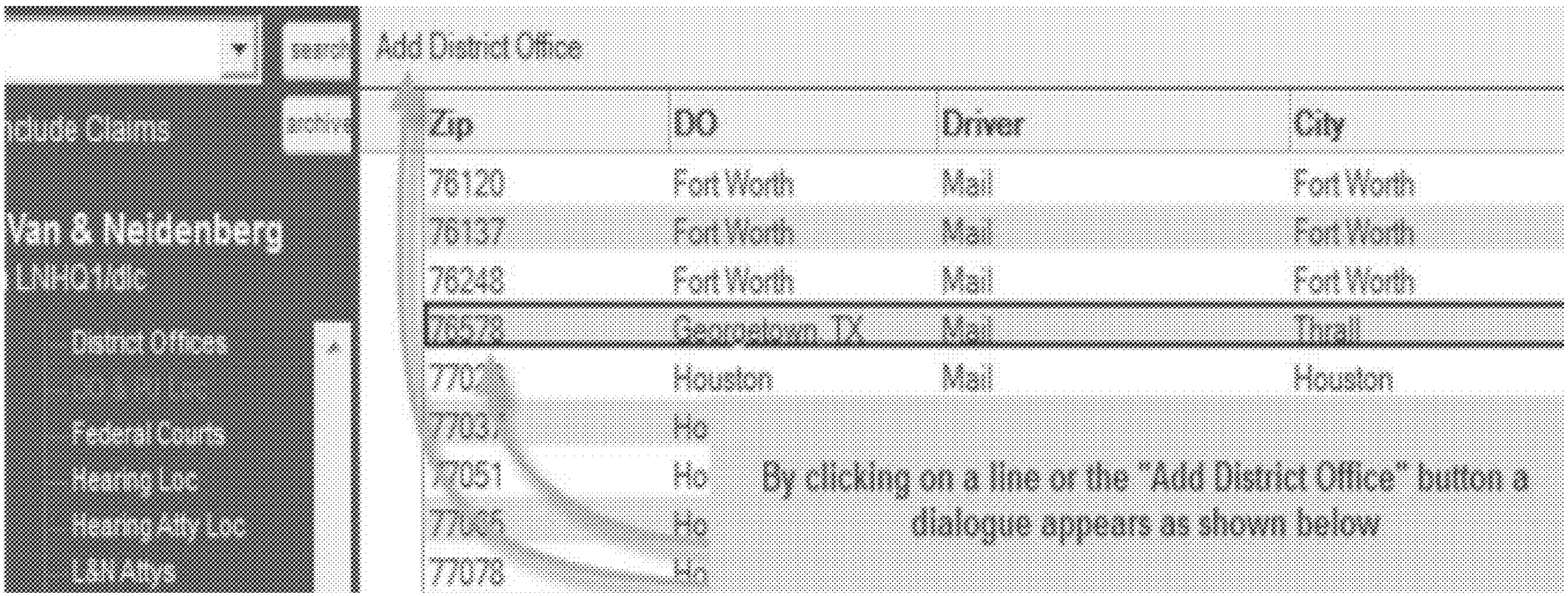

Pickup
Fig 118
Pickup People
Territory:
Pickup Name:
Chris Marrow
Method:
eMail
eMail:
csmarrow@bellsouth.net
Tel:
404-484-2847
All information for the Pickup Person is input in the dialogue

Fig. 119

This view matches the client's zip code to the DO and then assigns the DDS, ODAR, and Pickup Person based on the DO:



Contact - District Office Locator

Fig. 120

needs to be a dialog (lookup to district offices view for choices)

District Office & Pickup Locator

DO:	Georgetown, TX	Pickup Name:	Mail
DO City:	Thrall		
DO State:	TX		
DO Zip:	76578	2	if zip not recognized (doesn't exist) need to used dialog for LA to lookup on SSA website.
DO Country:	Dallas	1 other than US	

Each component is entered into the DO & PU Locator - DO (which assigns the DO, DDS, and ODAR), client's Zip Code, City, and County, and the Pickup Person.

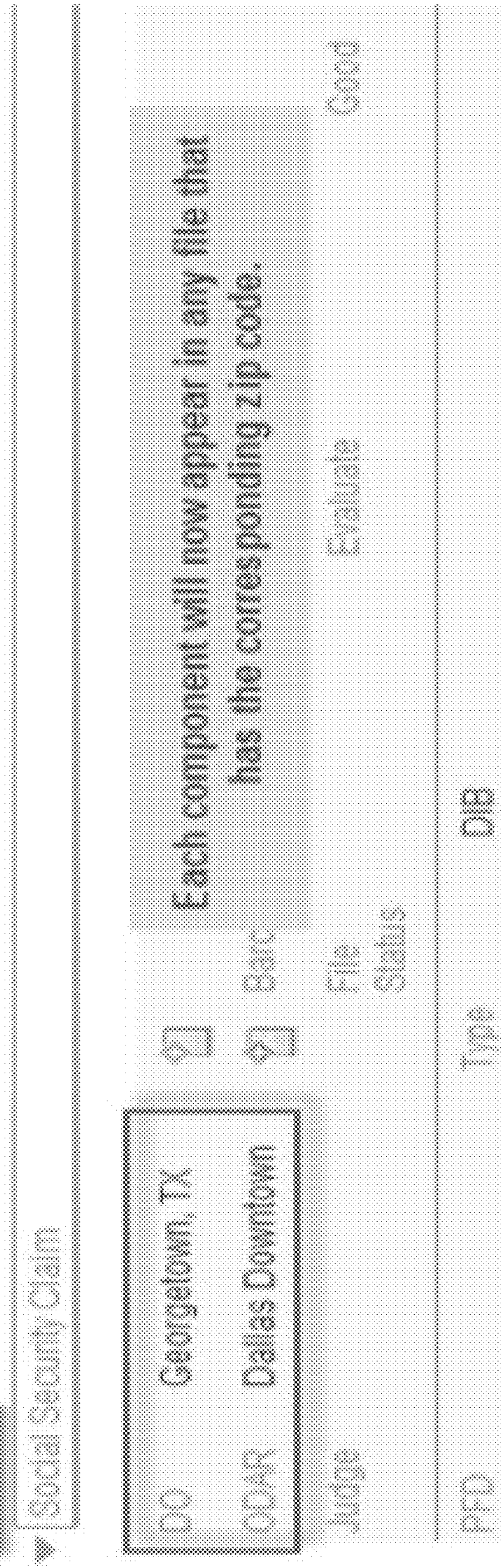
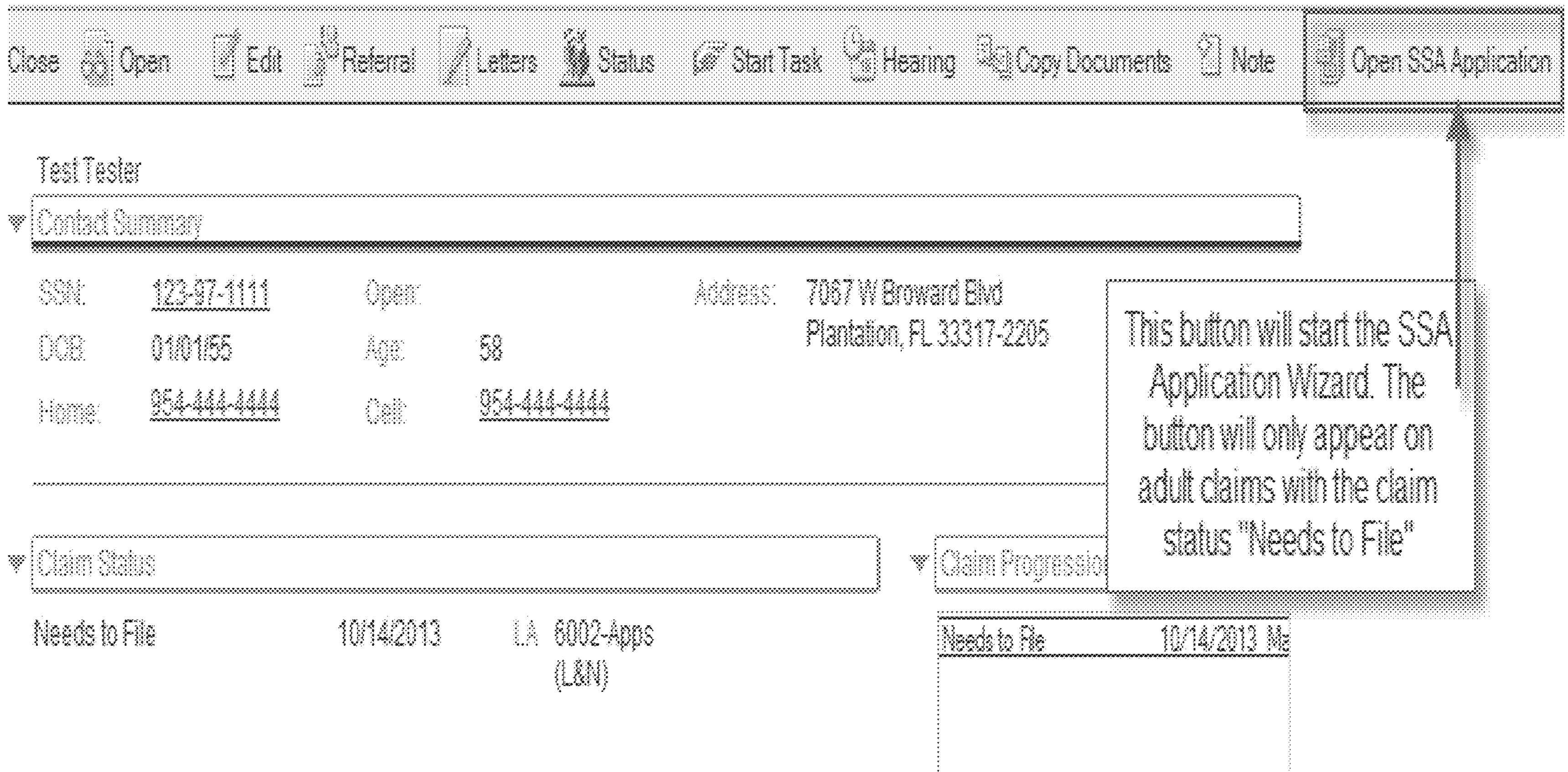

Social Security Claim
DO Georgetown, TX
ODAR Dallas Downtown
Judge
Bac
File Status
Evaluate
Good
Each component will now appear in any file that has the corresponding zip code.
PFD
Type
DIB

Fig. 121

Fig. 122

Application Wizard

The Application Wizard was designed to condense the processing time and make the questions more user friendly.



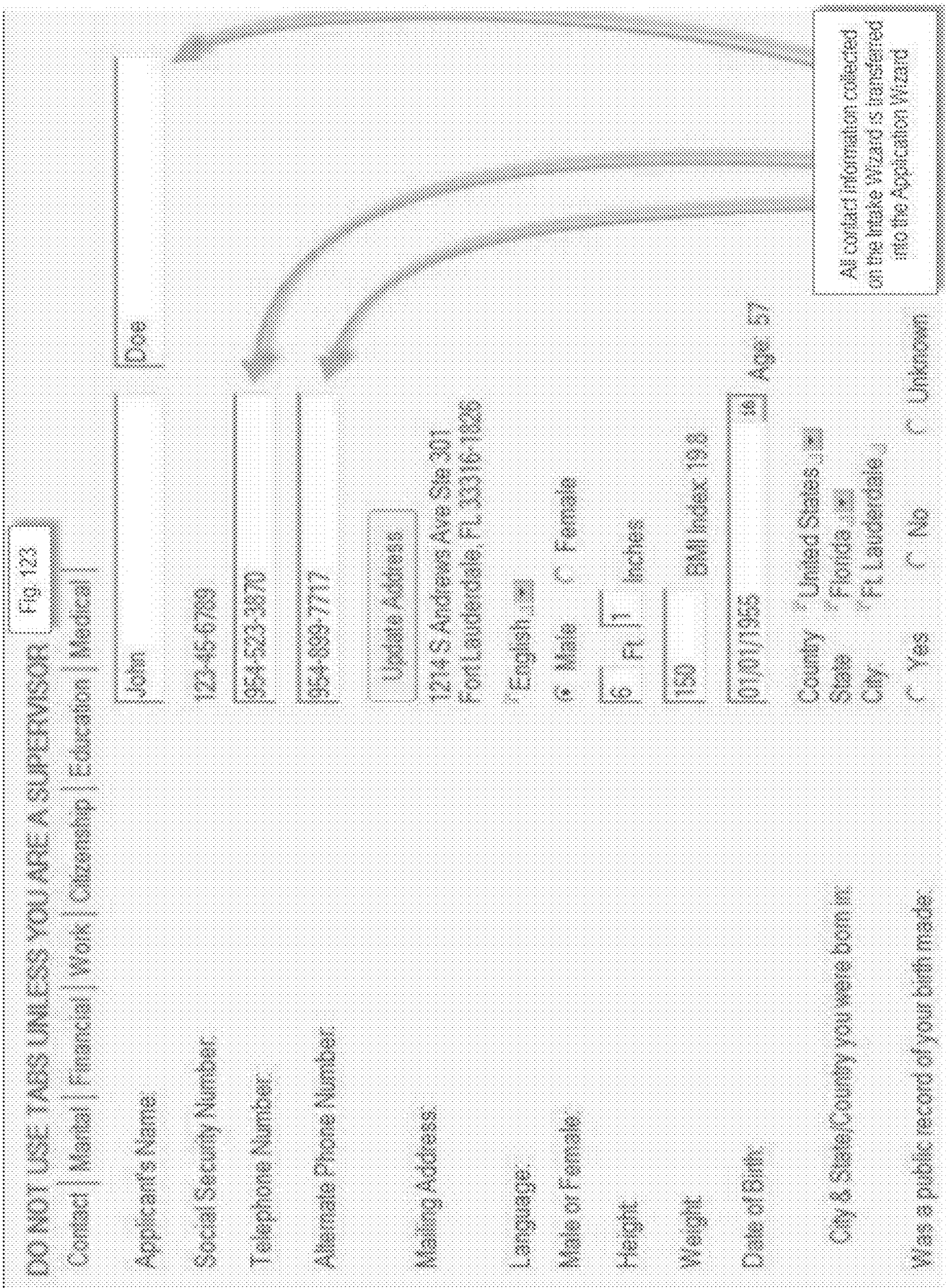
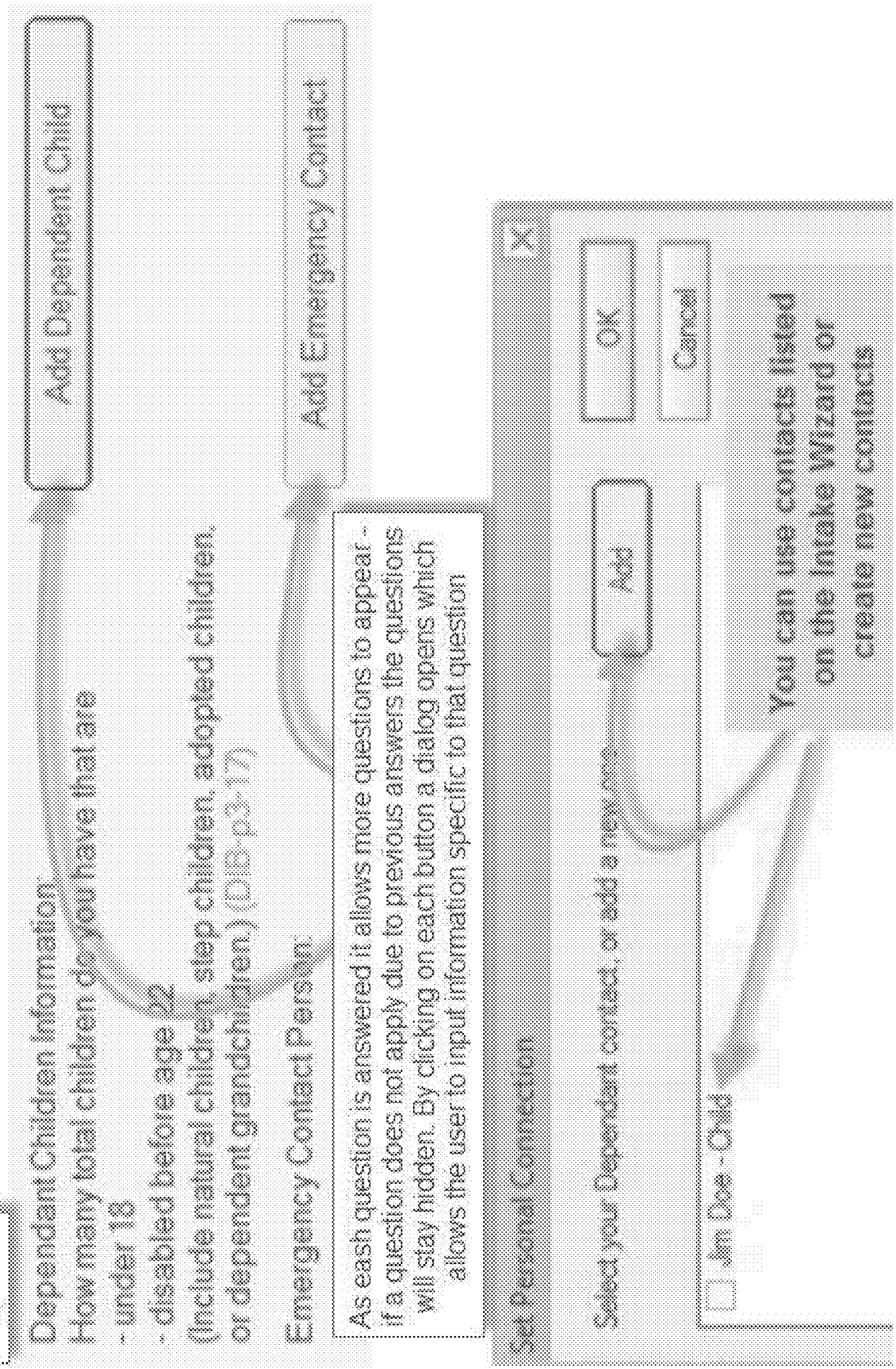


Fig. 123
DO NOT USE TABS UNLESS YOU ARE A SUPERVISOR
Contact | Marital | Financial | Work | Citizenship | Education | Medical
Applicant's Name:
John
Doe
Social Security Number:
123-45-6789
Telephone Number:
954-523-3870
Alternate Phone Number:
954-889-7717
Update Address
Mailing Address:
1214 S Andrews Ave Ste 301
Fort Lauderdale, FL 33316-1826
Language:
English
Male or Female:
Male
Female
Height:
6
Ft.
1
Inches
Weight:
150
BMI Index 19.8
Date of Birth:
01/01/1955
Age: 57
City & State/Country you were born in:
Country
United States
State
Florida
City
Ft Lauderdale
Was a public record of your birth made:
Yes
No
Unknown
All contact information collected on the Intake Wizard is transferred into the Application Wizard

Fig. 124


Dependant Children Information
How many total children do you have that are
- under 18
- disabled before age 22
(include natural children, step children, adopted children, or dependent grandchildren.) (DB-p3-17)
Emergency Contact Person
Add Dependent Child
Add Emergency Contact
As eash question is answered it allows more questions to appear - if a question does not apply due to previous answers the questions will stay hidden. By clicking on each button a dialog opens which allows the user to input information specific to that question
Set Personal Connection
Select your Dependant contact, or add a new one
Add
OK
Cancel
Jim Doe - Child
You can use contacts listed on the Intake Wizard or create new contacts

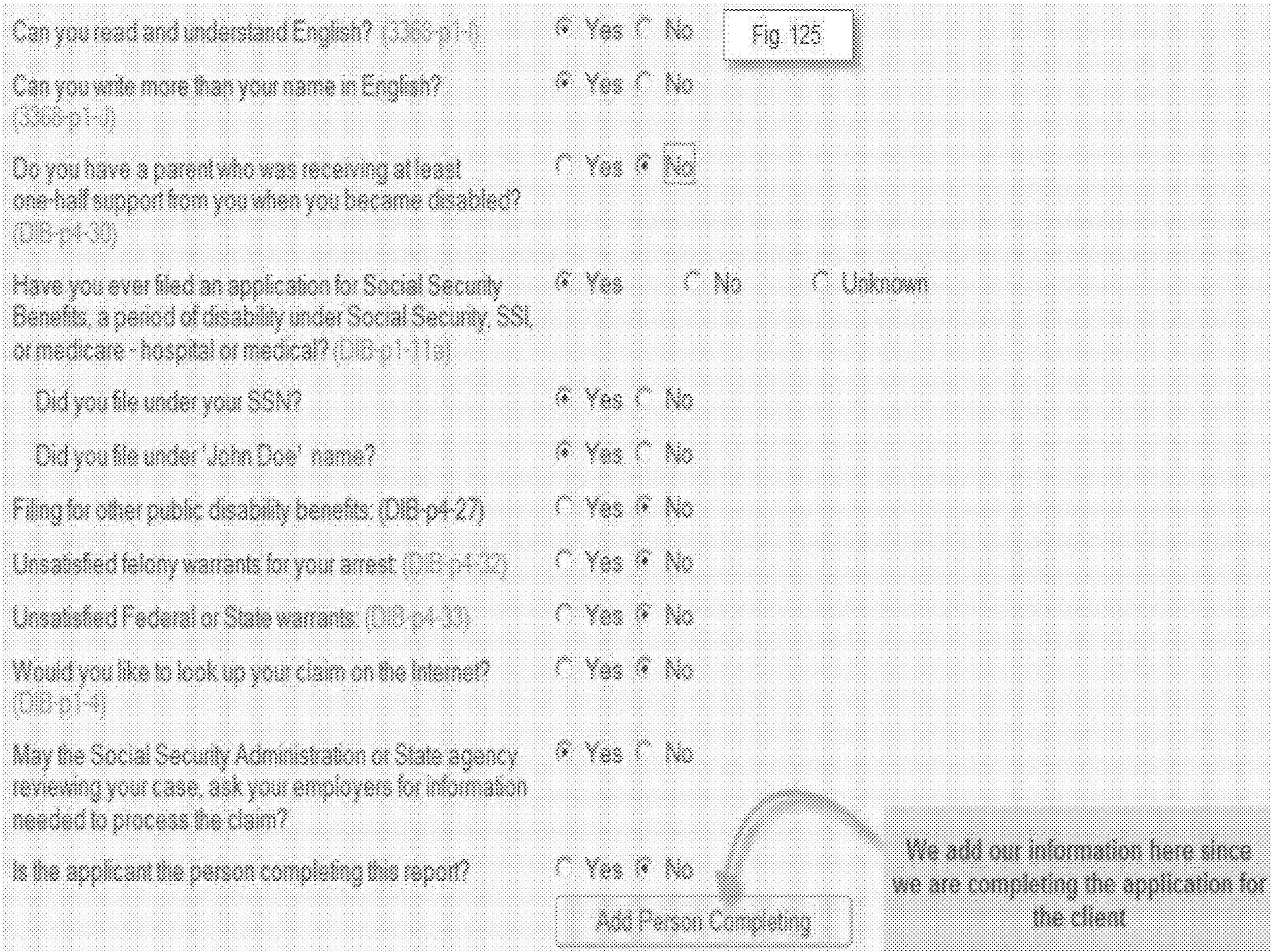

Can you read and understand English? (3368-p1-I) Yes No
Can you write more than your name in English? (3368-p1-J) Yes No
Do you have a parent who was receiving at least one-half support from you when you became disabled? (DIB-p4-30) Yes No
Have you ever filed an application for Social Security Benefits, a period of disability under Social Security, SSI, or medicare - hospital or medical? (DIB-p1-11a) Yes No Unknown
Did you file under your SSN? Yes No
Did you file under 'John Doe' name? Yes No
Filing for other public disability benefits: (DIB-p4-27) Yes No
Unsatisfied felony warrants for your arrest (DIB-p4-32) Yes No
Unsatisfied Federal or State warrants: (DIB-p4-33) Yes No
Would you like to look up your claim on the Internet? (DIB-p1-4) Yes No
May the Social Security Administration or State agency reviewing your case, ask your employers for information needed to process the claim? Yes No
Is the applicant the person completing this report? Yes No
Add Person Completing
We add our information here since we are completing the application for the client

Fig. 125

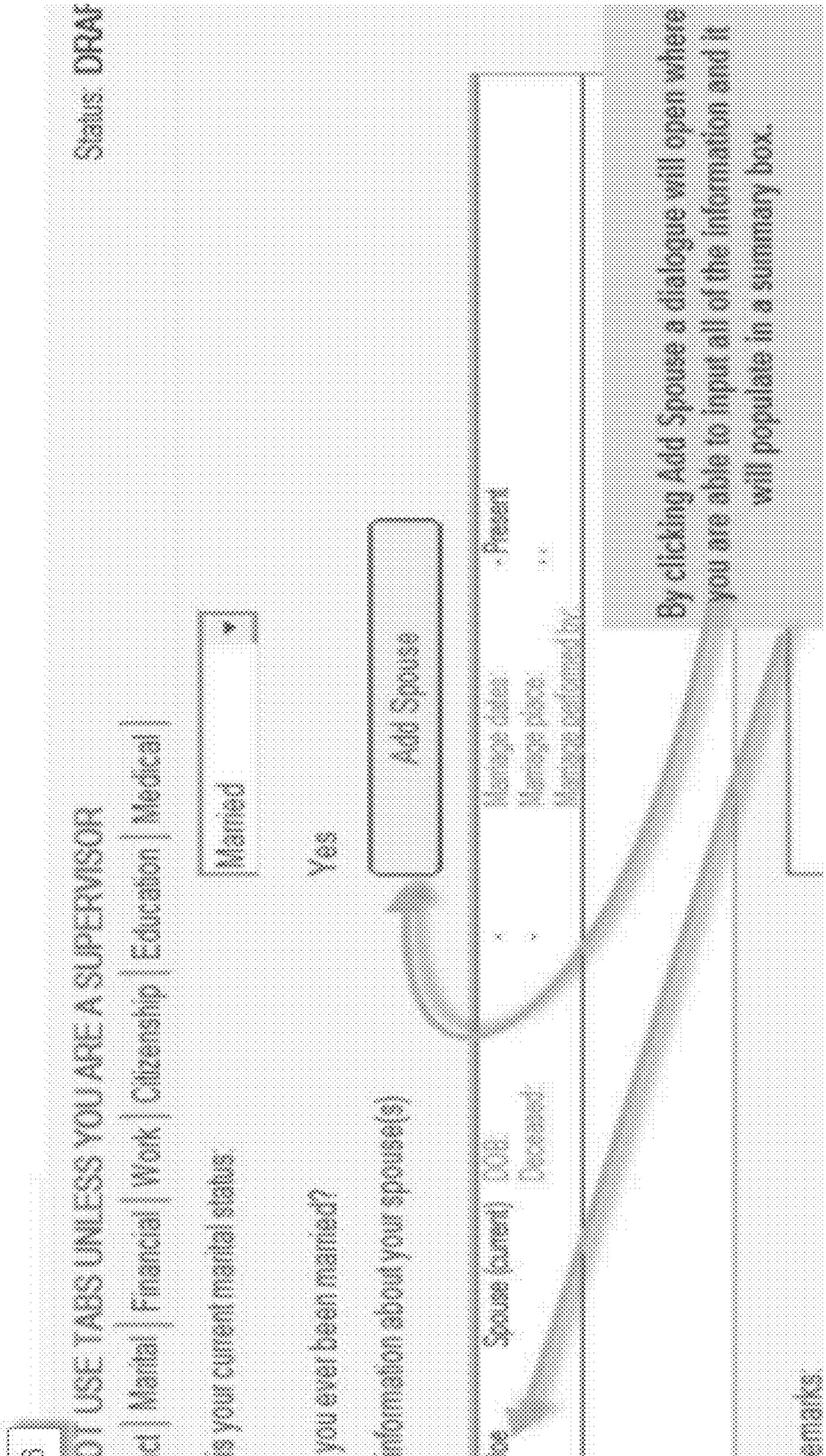


Fig. 128
DO NOT USE TABS UNLESS YOU ARE A SUPERVISOR
Status: DRAF
Contact | Marital | Financial | Work | Citizenship | Education | Medical
What is your current marital status
Married
Have you ever been married?
Yes
Enter information about your spouse(s)
Add Spouse
Jane Doe
Spouse (current)
DOB
Deceased
Present
By clicking Add Spouse a dialogue will open where you are able to input all of the information and it will populate in a summary box.
SSI Remarks

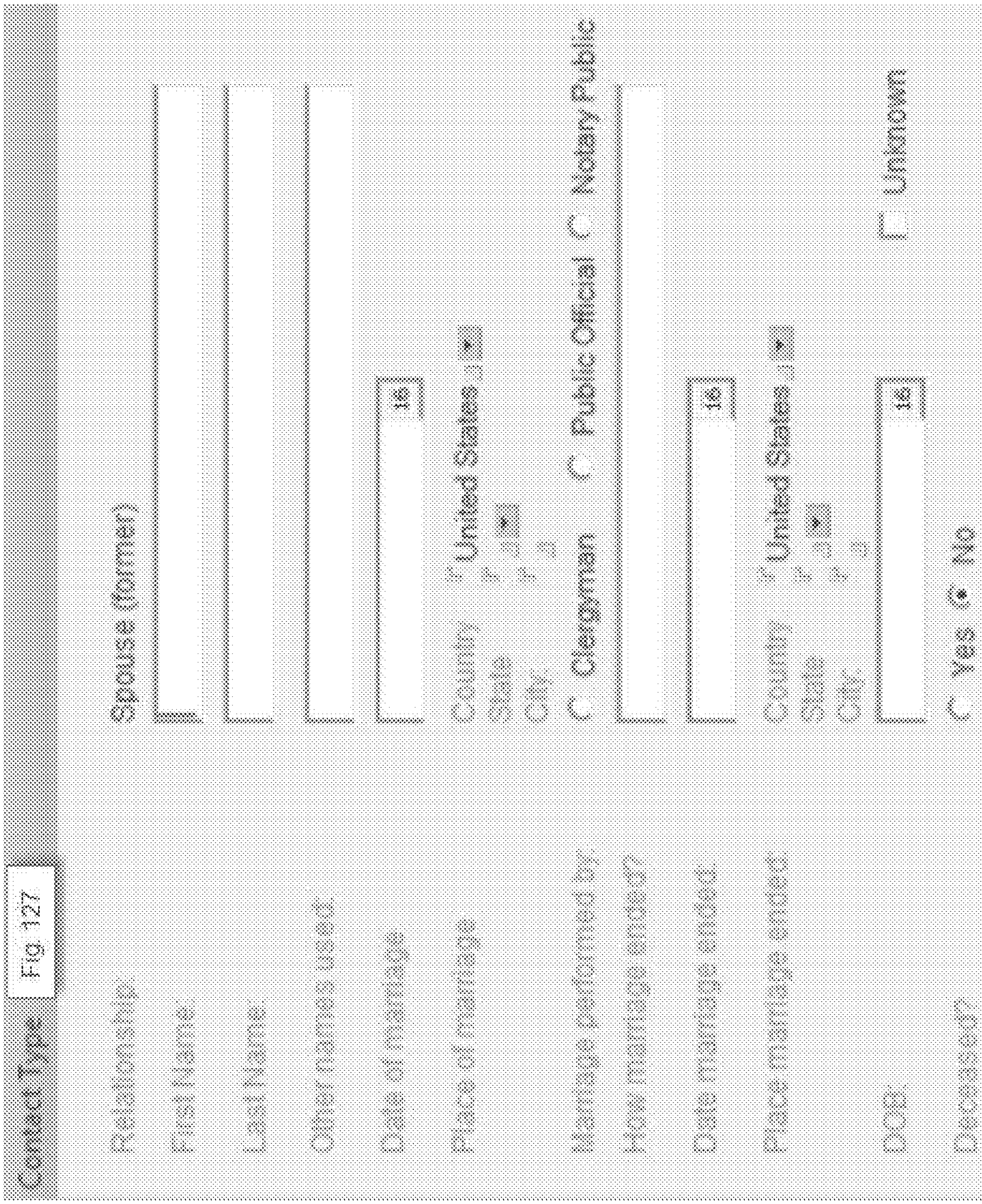

Contact Type
Relationship
Spouse (former)
First Name
Last Name
Other names used
Date of marriage
16
Place of marriage
Country
United States
State
City
Marriage performed by
Clergyman
Public Official
Notary Public
How marriage ended?
Date marriage ended
16
Place marriage ended
Country
United States
State
City
DOB
16
Unknown
Deceased?
Yes
No

Fig 127

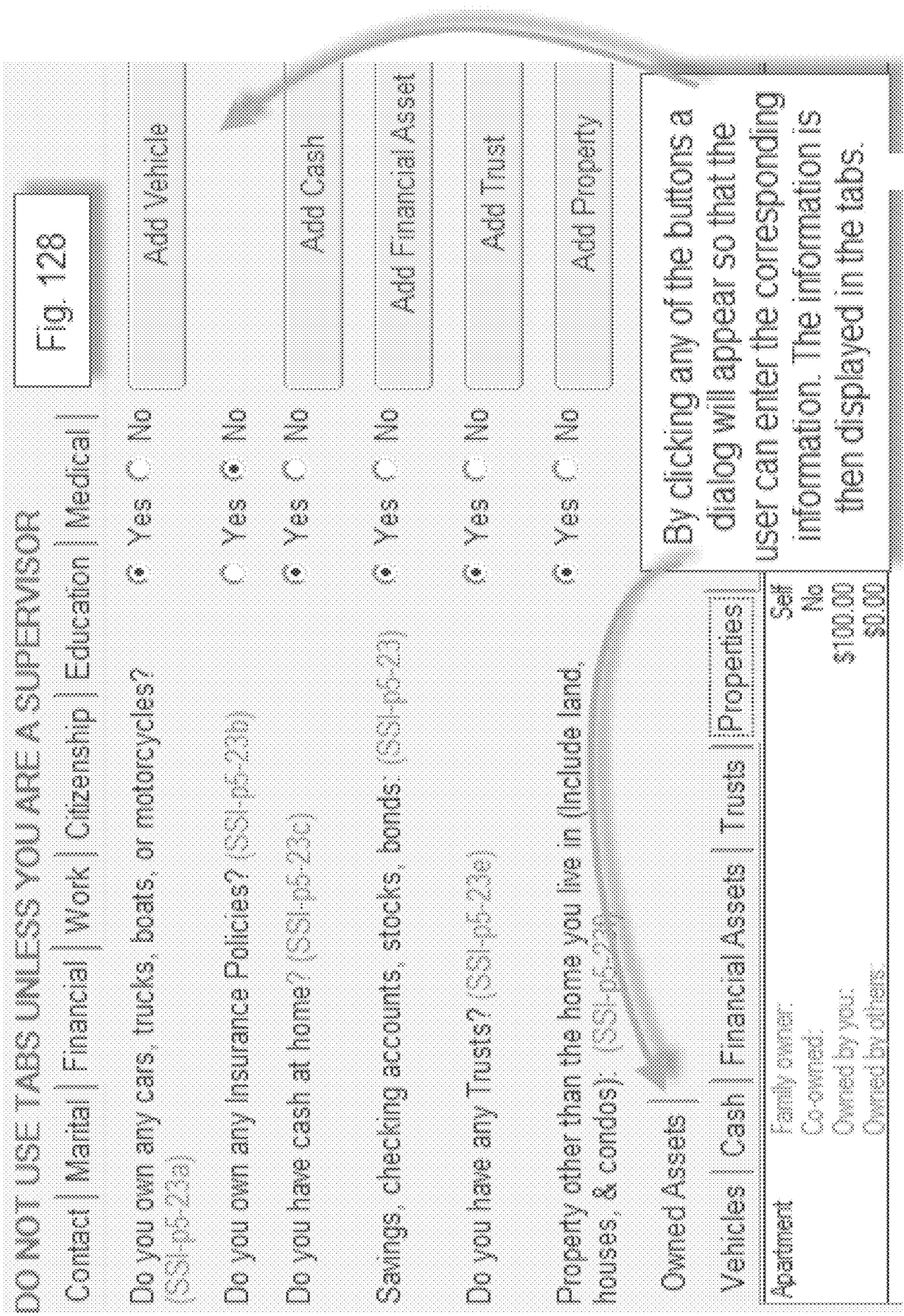
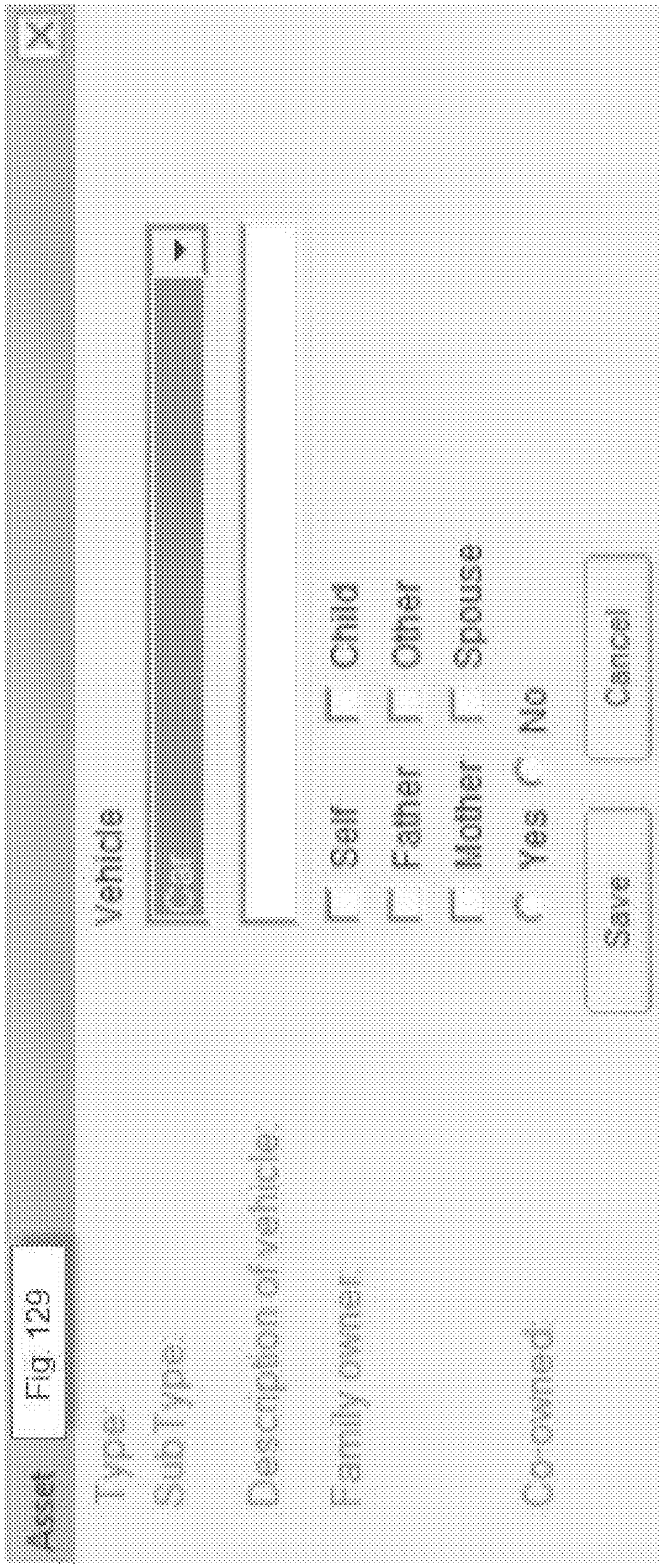

DO NOT USE TABS UNLESS YOU ARE A SUPERVISOR
Contact | Marital | Financial | Work | Citizenship | Education | Medical |
Do you own any cars, trucks, boats, or motorcycles? (SSI-p5-23a)
Yes No
Add Vehicle
Do you own any Insurance Policies? (SSI-p5-23b)
Yes No
Do you have cash at home? (SSI-p5-23c)
Yes No
Add Cash
Savings, checking accounts, stocks, bonds: (SSI-p5-23)
Yes No
Add Financial Asset
Do you have any Trusts? (SSI-p5-23e)
Yes No
Add Trust
Property other than the home you live in (Include land, houses, & condos): (SSI-p5-23f)
Yes No
Add Property
Owned Assets
Vehicles | Cash | Financial Assets | Trusts | Properties
Apartment
Family owner: Self
Co-owned: No
Owned by you: $100.00
Owned by others: $0.00
By clicking any of the buttons a dialog will appear so that the user can enter the corresponding information. The information is then displayed in the tabs.

Fig. 128


Asset
Fig 129
Type:
Vehicle
SubType
Description of vehicle
Family owner
Self
Child
Father
Other
Mother
Spouse
Co-owned
Yes
No
Save
Cancel

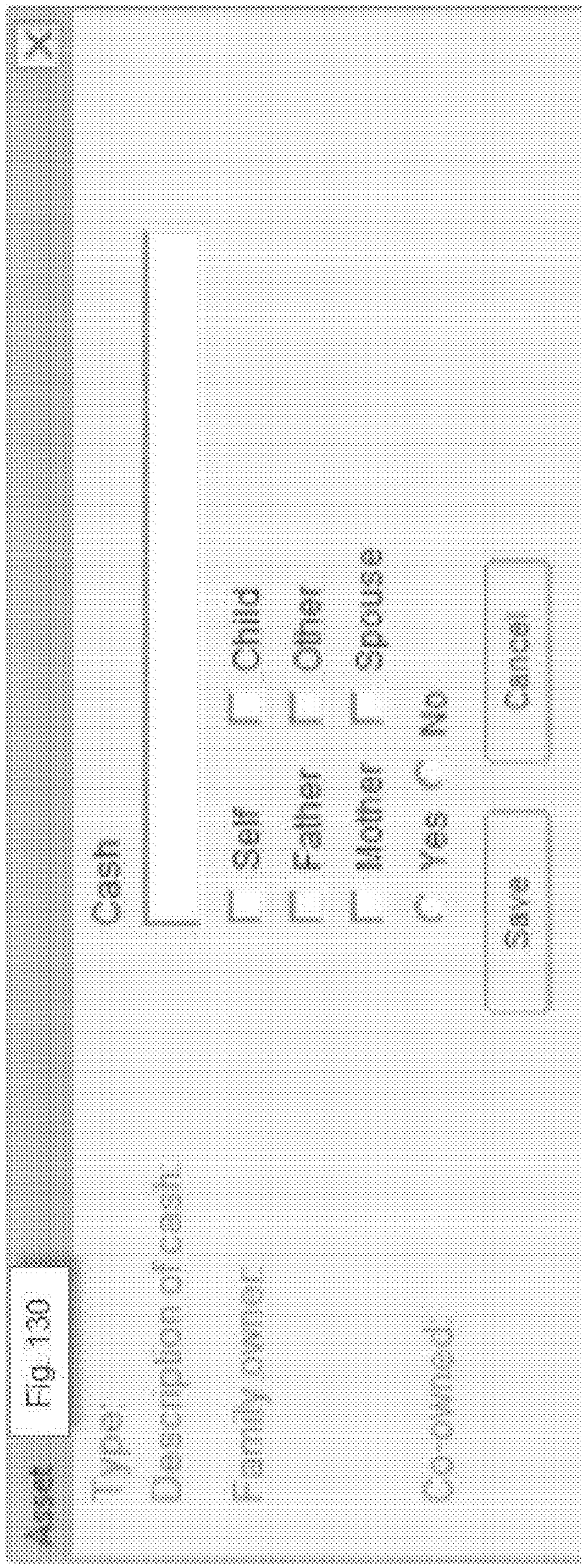

Asset
Type:
Cash
Description of cash:
Family owner:
Self
Child
Father
Other
Mother
Spouse
Co-owned:
Yes
No
Save
Cancel

Fig. 130

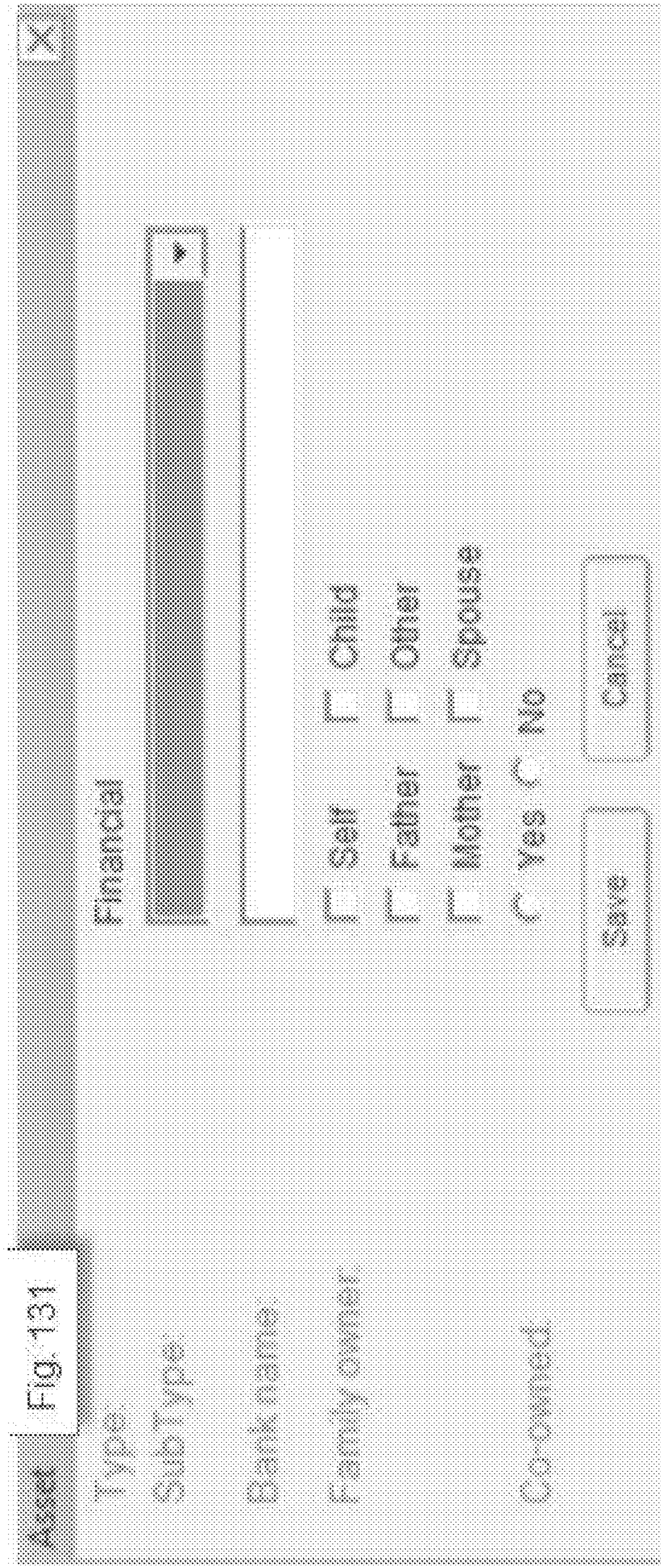

Asset
Type:
SubType
Bank name
Family owner
Co-owned
Financial
Self
Child
Father
Other
Mother
Spouse
Yes
No
Save
Cancel

Fig. 131

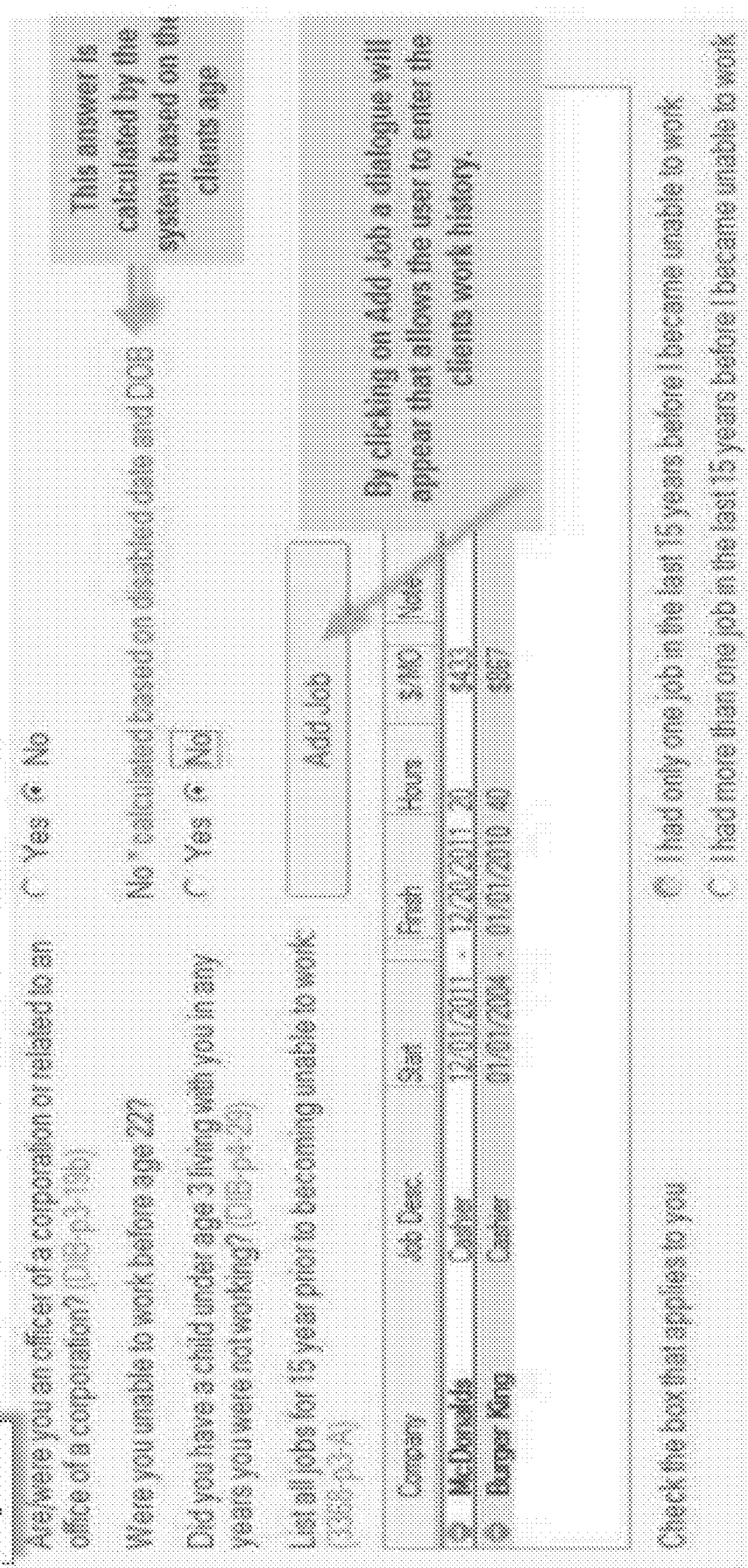

Are/were you an officer of a corporation or related to an office of a corporation? (DIB-p3-19b)
Yes
No
Were you unable to work before age 22?
No * calculated based on disabled date and DOB
This answer is calculated by the system based on the clients age
Did you have a child under age 3 living with you in any years you were not working? (DIB-p4-26)
Yes
No
List all jobs for 15 year prior to becoming unable to work: (DIB-p3-A)
Add Job
By clicking on Add Job a dialogue will appear that allows the user to enter the clients work history.
Company
Job Desc.
Start
Finish
Hours
$/MO
Note
McDonalds
Cashier
12/01/2011
12/28/2011
20
Burger King
Cashier
01/01/2004
01/01/2010
40
Check the box that applies to you
I had only one job in the last 15 years before I became unable to work
I had more than one job in the last 15 years before I became unable to work

Fig. 132

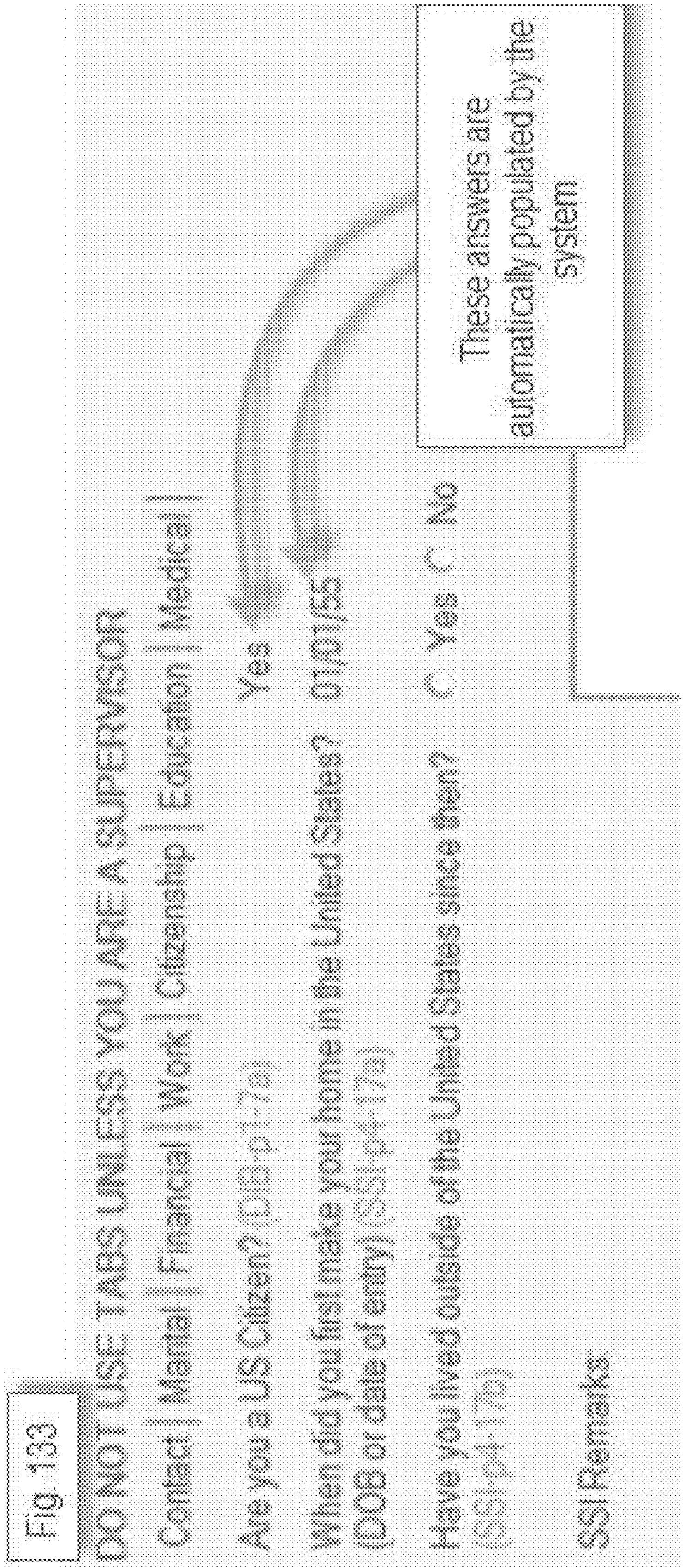

DO NOT USE TABS UNLESS YOU ARE A SUPERVISOR
Contact | Marital | Financial | Work | Citizenship | Education | Medical |
Are you a US Citizen? (DIB-p1-7a)
Yes
When did you first make your home in the United States? (DOB or date of entry) (SSI-p4-17a)
01/01/55
Have you lived outside of the United States since then? (SSI-p4-17b)
Yes
No
SSI Remarks
These answers are automatically populated by the system

Fig. 133

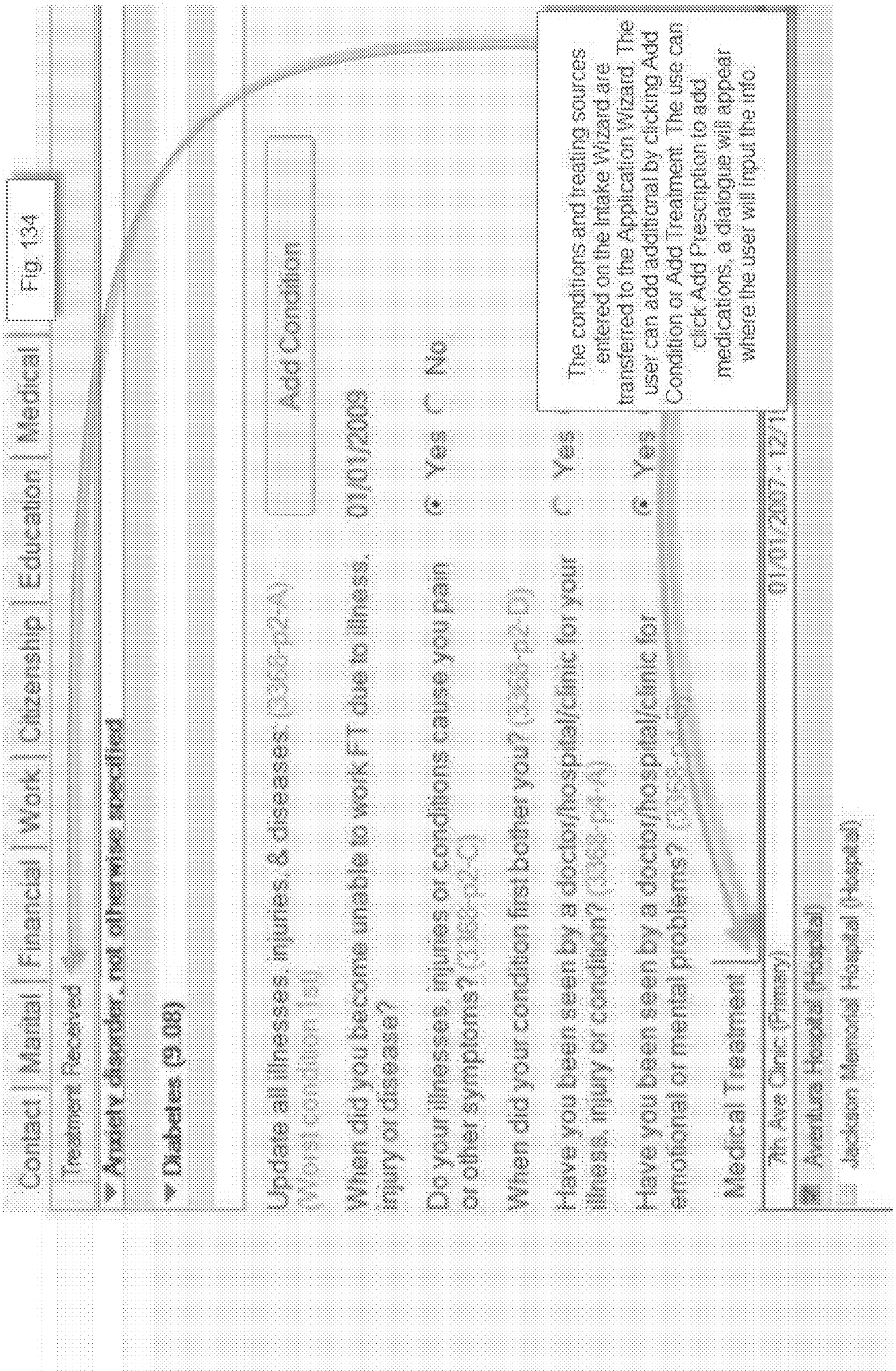

Contact | Marital | Financial | Work | Citizenship | Education | Medical
Treatment Received
Anxiety disorder, not otherwise specified
Diabetes (9.08)
Update all illnesses, injuries, & diseases (3368-p2-A)
Worst condition 1st
Add Condition
When did you become unable to work FT due to illness, injury or disease?
01/01/2009
Do your illnesses, injuries or conditions cause you pain or other symptoms? (3368-p2-C)
Yes No
When did your condition first bother you? (3368-p2-D)
Have you been seen by a doctor/hospital/clinic for your illness, injury or condition? (3368-p4-A)
Yes
Have you been seen by a doctor/hospital/clinic for emotional or mental problems?
Yes
Medical Treatment
7th Ave Clinic (Primary)
01/01/2007 - 12/1
Aventura Hospital (Hospital)
Jackson Memorial Hospital (Hospital)
The conditions and treating sources entered on the Intake Wizard are transferred to the Application Wizard. The user can add additional by clicking Add Condition or Add Treatment. The use can click Add Prescription to add medications, a dialogue will appear where the user will input the info.

Fig. 134

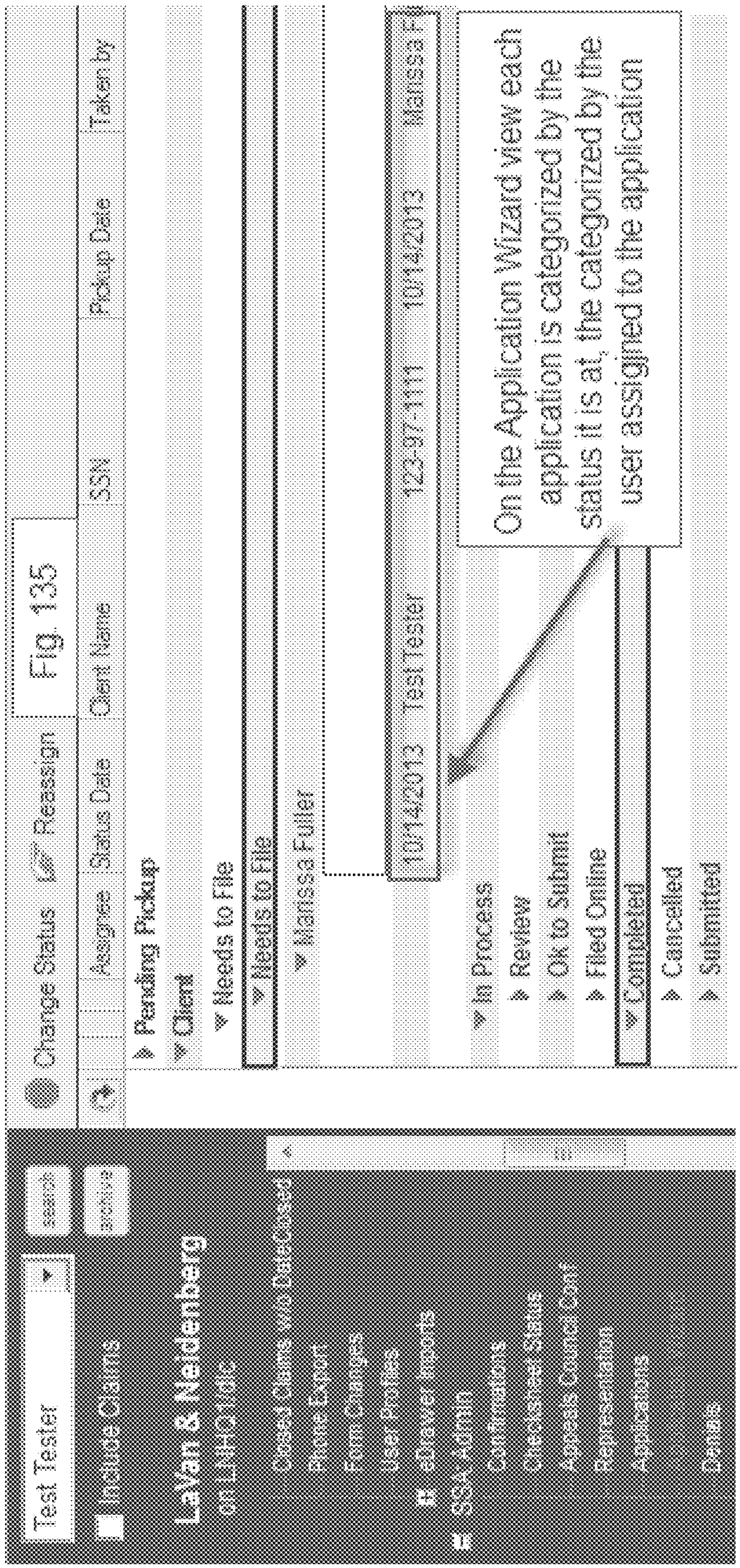


Fig. 135
Test Tester
Include Claims
search
archive
LaVan & Neidenberg
Closed Claims w/o DateClosed
Phone Export
Form Changes
User Profiles
eDrawer Imports
SSA Admin
Confirmations
Checksheet Status
Appeals Council Conf
Representation
Applications
Denials
Change Status
Reassign
Assignee
Status Date
Client Name
SSN
Pickup Date
Taken by
Pending Pickup
Client
Needs to File
Needs to File
Marissa Fuller
10/14/2013
Test Tester
123-97-1111
10/14/2013
In Process
Review
Ok to Submit
Filed Online
Completed
Cancelled
Submitted
On the Application Wizard view each application is categorized by the status it is at, the categorized by the user assigned to the application

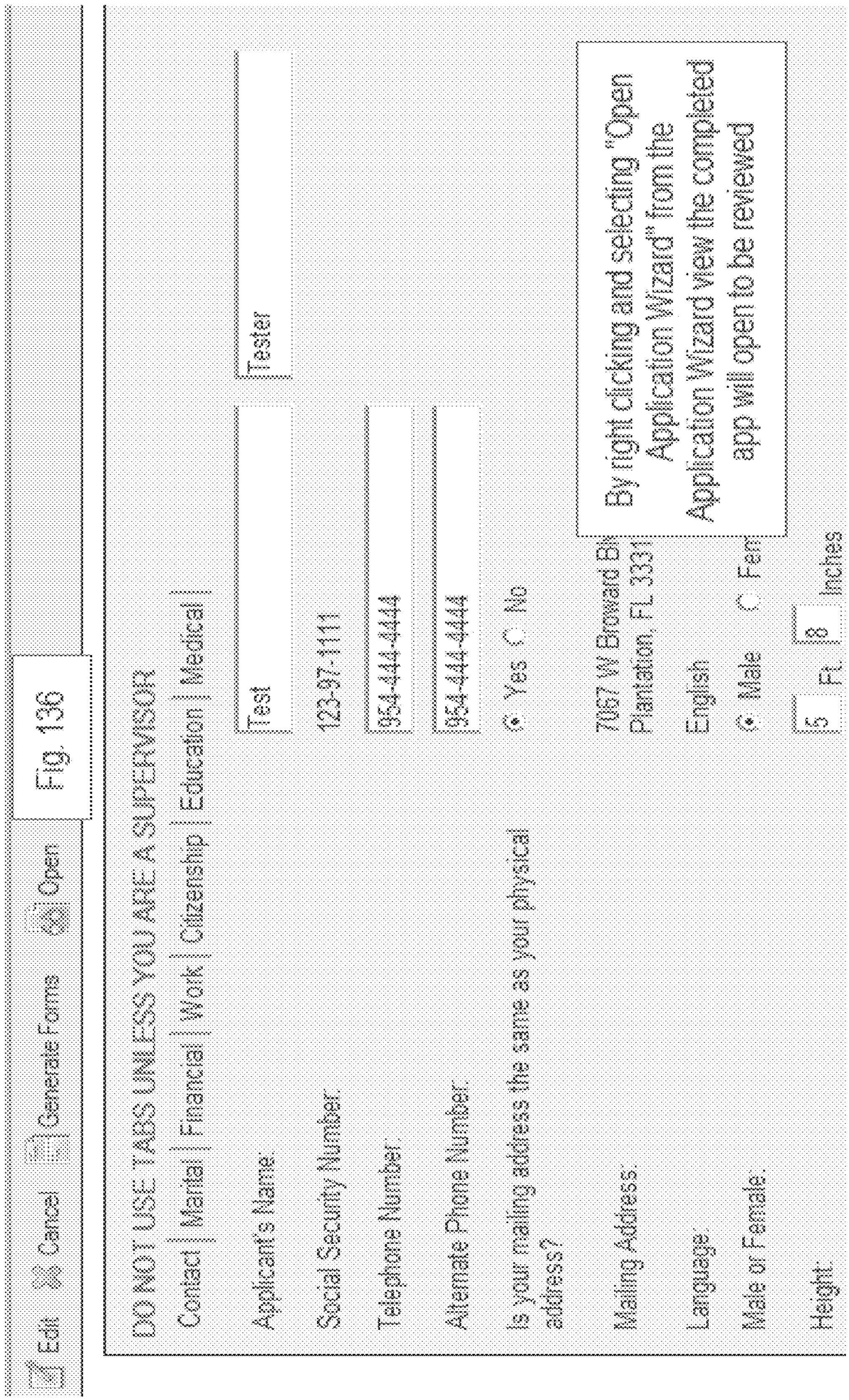

Edit
Cancel
Generate Forms
Open
DO NOT USE TABS UNLESS YOU ARE A SUPERVISOR
Contact | Marital | Financial | Work | Citizenship | Education | Medical
Applicant's Name:
Test
Tester
Social Security Number:
123-97-1111
Telephone Number:
954-444-4444
Alternate Phone Number:
954-444-4444
Is your mailing address the same as your physical address?
Yes
No
Mailing Address:
7067 W Broward Bl
Plantation, FL 333
Language:
English
Male or Female:
Male
Fem
Height:
5
Ft
8
Inches
By right clicking and selecting "Open Application Wizard" from the Application Wizard view the completed app will open to be reviewed

Fig. 136

Fig. 137

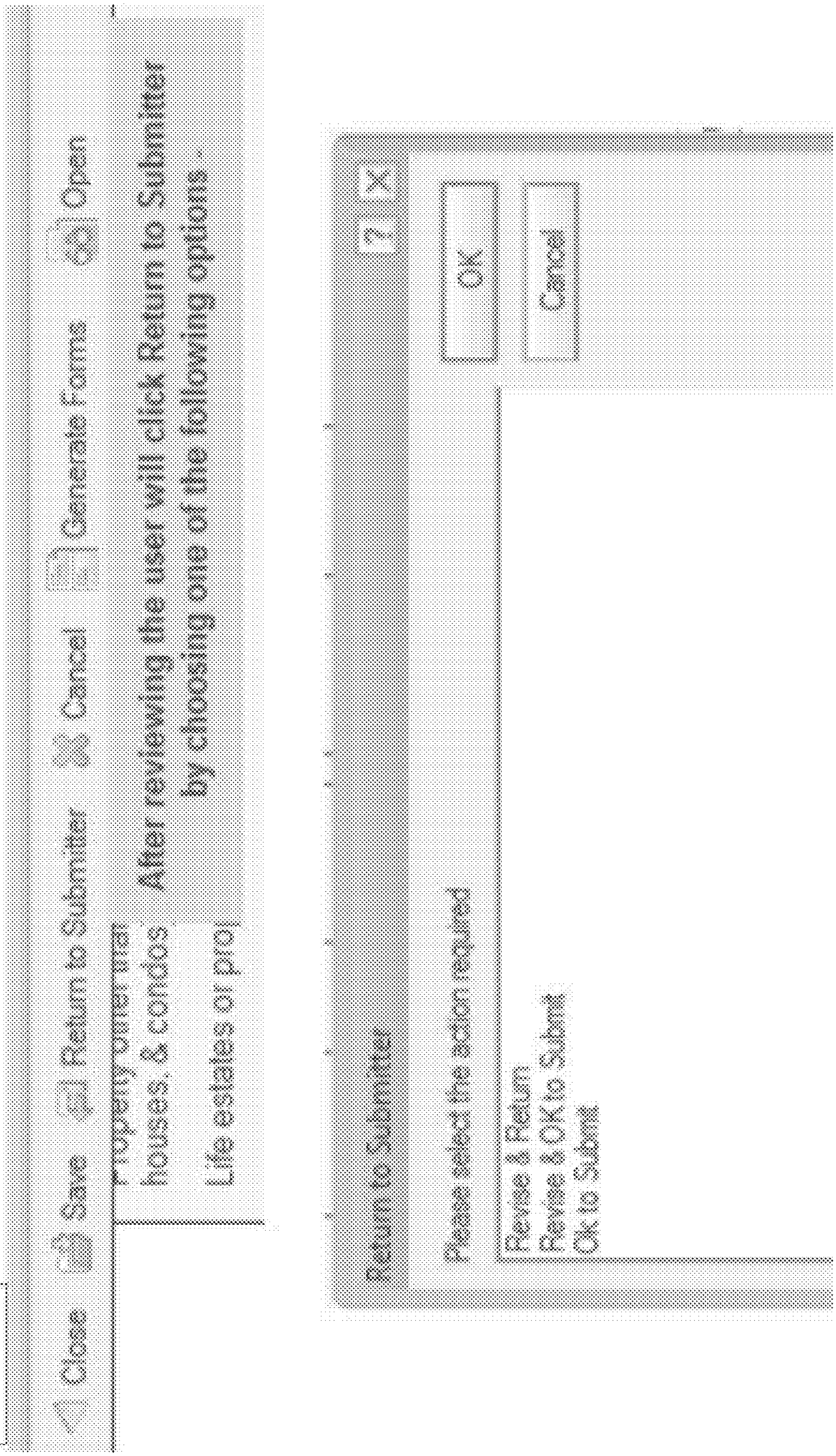

Close
Save
Return to Submitter
Cancel
Generate Forms
Open
houses, & condos
After reviewing the user will click Return to Submitter by choosing one of the following options -
Return to Submitter
Please select the action required
Revise & Return
Revise & OK to Submit
Ok to Submit
OK
Cancel

Fig. 138

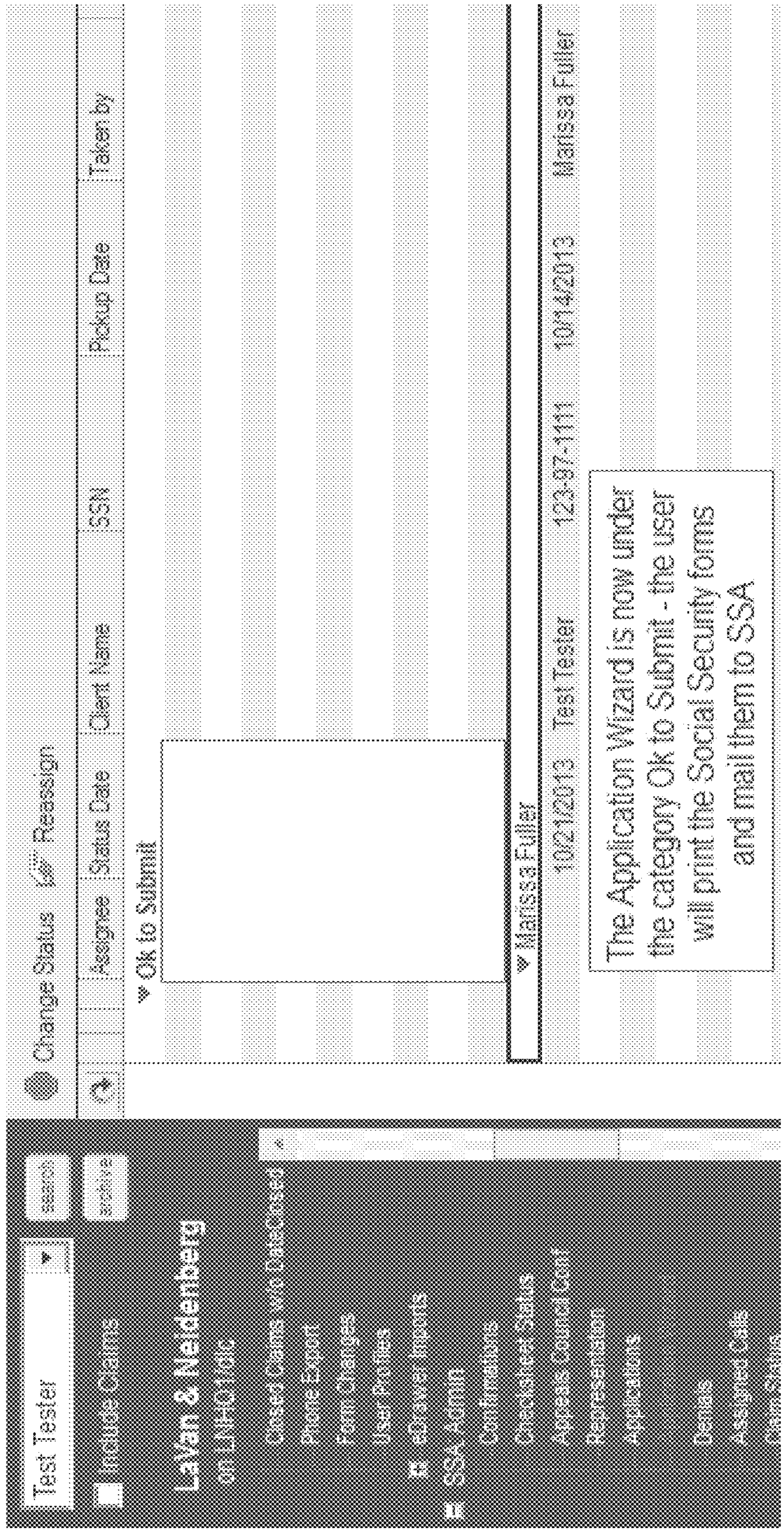

Test Tester
search
Include Claims
archive
LaVan & Neidenberg
on LNH-Q1vdc
Closed Claims w/o DateClosed
Phone Expert
Form Changes
User Profiles
eDrawer Imports
SSA Admin
Confirmations
Checksheet Status
Appeals Council Conf
Representation
Applications
Denials
Assigned Calls
Change Status
Reassign
Assignee
Status Date
Client Name
SSN
Pickup Date
Taken by
Ok to Submit
Marissa Fuller
10/21/2013
Test Tester
123-97-1111
10/14/2013
Marissa Fuller
The Application Wizard is now under the category Ok to Submit - the user will print the Social Security forms and mail them to SSA

Fig. 139

CD Landing Page - Medical Summary Tab

The Medical Summary tab organizes a client's medical history, including doctors and facilities that have treated the client, the dates of treatment, and the status of whether such medical records have been requested, received, reviewed, and submitted. Helpful icons, subheadings, and notations keep useful information organized and user friendly.

This printscreen is the Landing Page for the Case Developers (CDs).

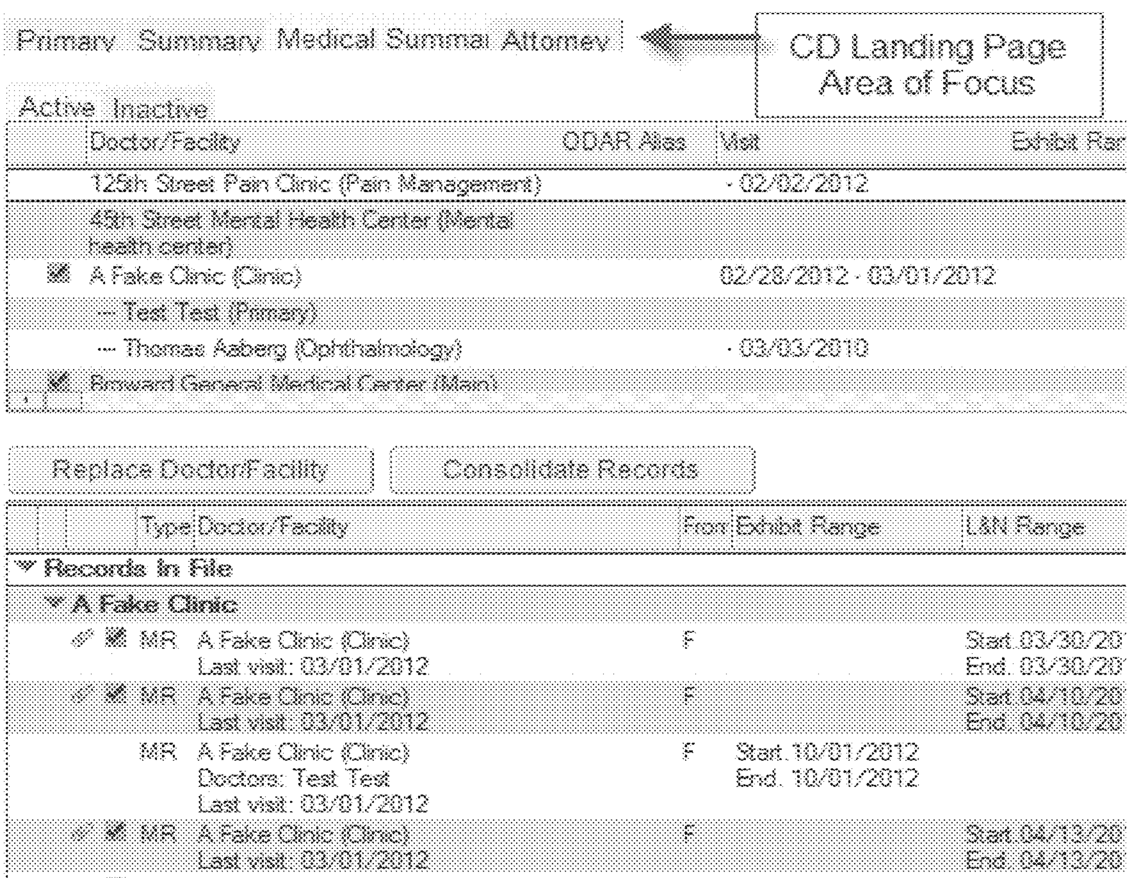
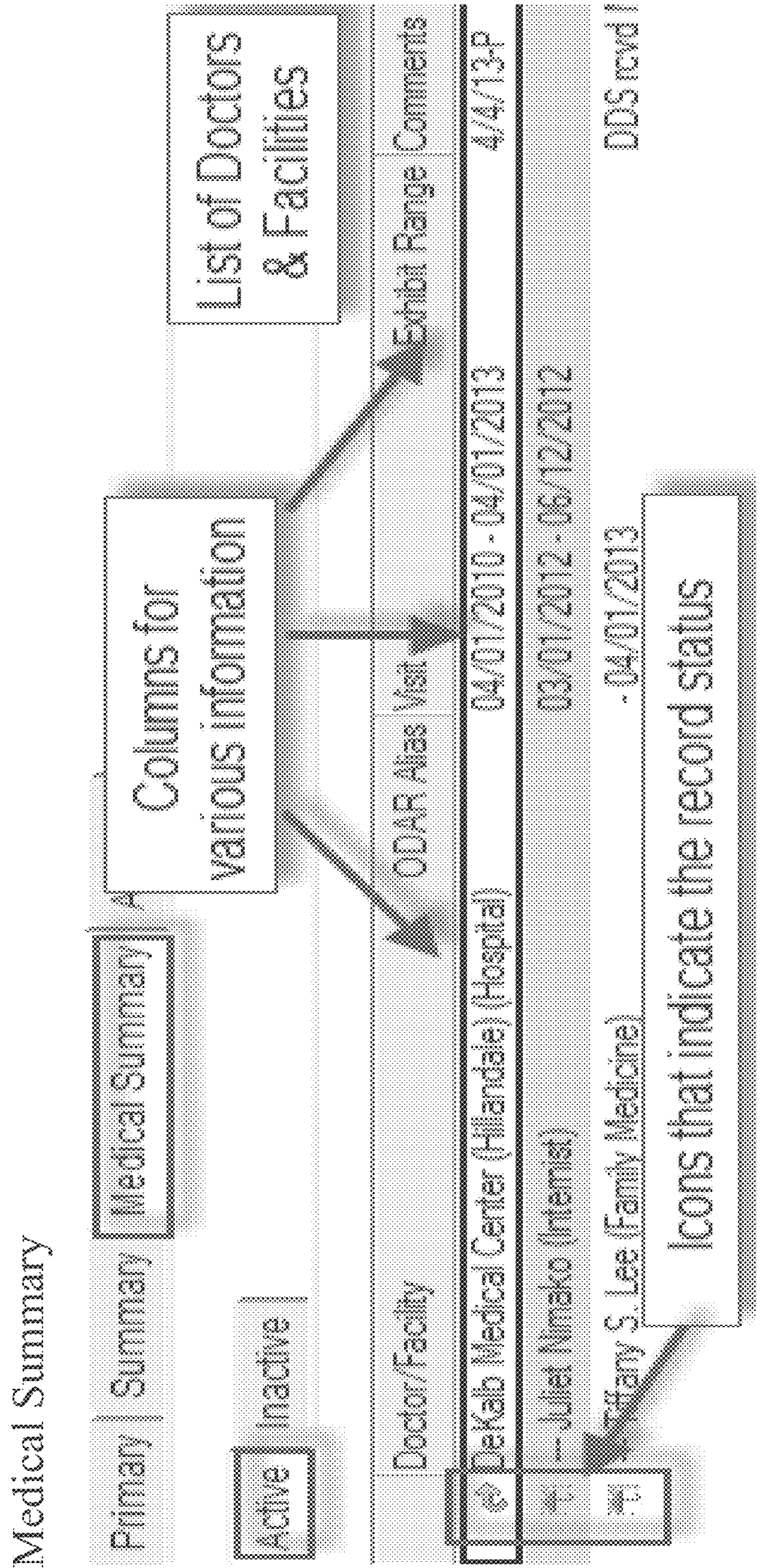


Fig. 140a


Medical Summary
Primary | Summary | Medical Summary
Active
Inactive
List of Doctors & Facilities
Columns for various information
Doctor/Facility
ODAR Alias
Visit
Exhibit Range
Comments
DeKalb Medical Center (Hillandale) (Hospital)
04/01/2010 - 04/01/2013
4/4/13-P
Juliet Nmako (Internist)
03/01/2012 - 06/12/2012
- 04/01/2013
DDS rcvd
Icons that indicate the record status

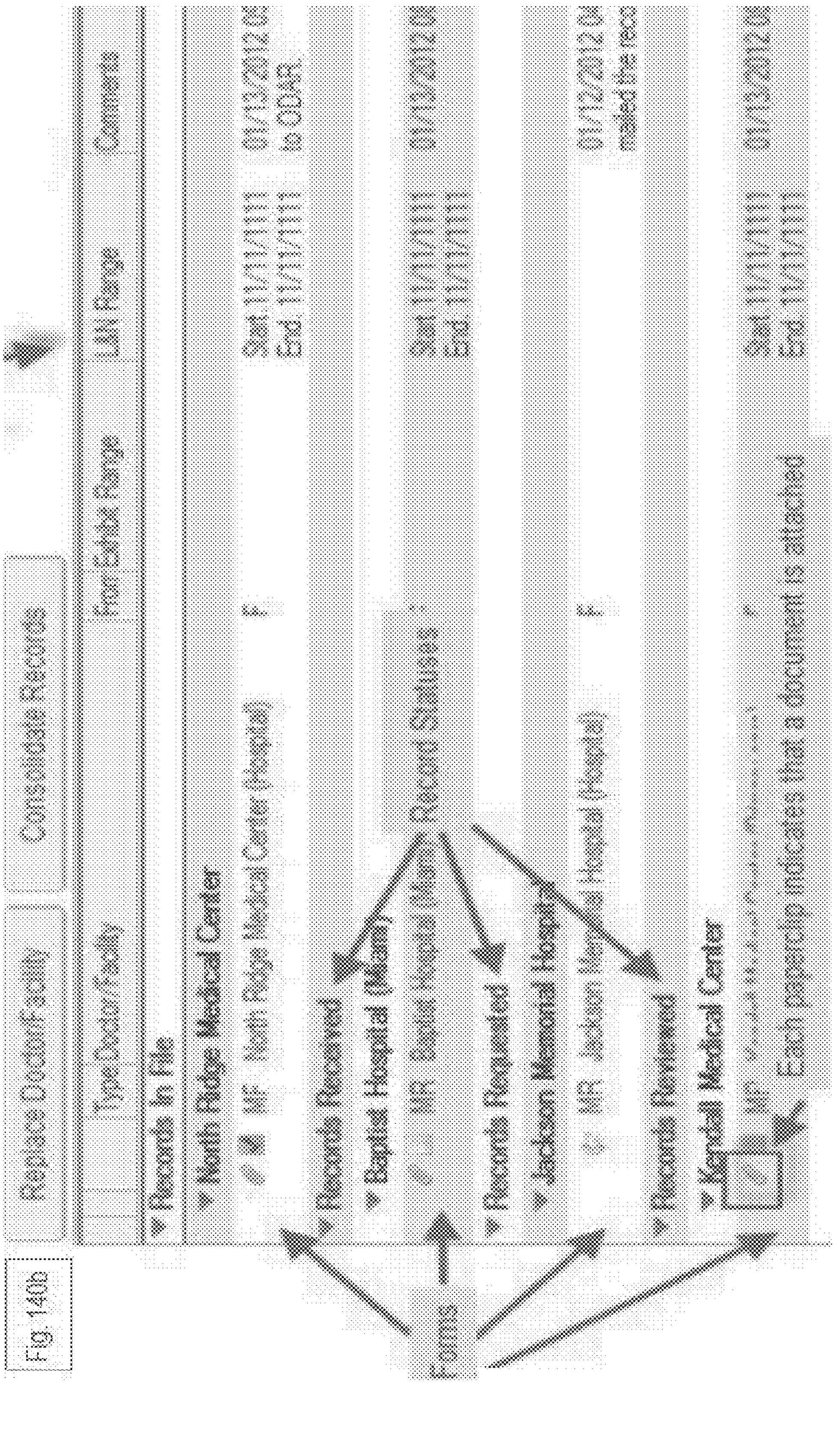

Replace Doctor/Facility
Consolidate Records
Type/Doctor/Facility
From Exhibit Range
LMN Range
Comments
Records In File
North Ridge Medical Center
MF North Ridge Medical Center (Hospital)
F
Start 11/11/1111
End 11/11/1111
01/13/2012
to ODAR
Records Received
Baptist Hospital (Miami)
MR Baptist Hospital (Miami)
Record Statuses
Records Requested
Jackson Memorial Hospital
MR Jackson Memorial Hospital (Hospital)
01/12/2012
mailed the reco
Records Reviewed
Kendall Medical Center
Each paperclip indicates that a document is attached
Forms

Fig 140b

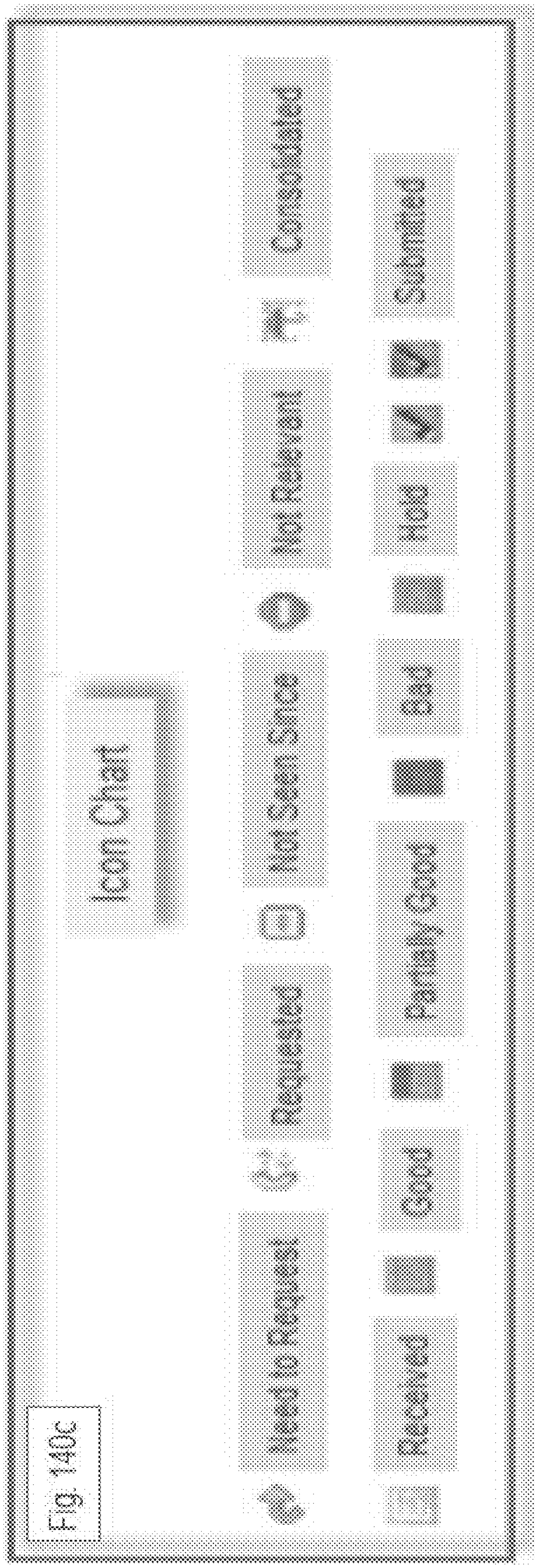

Icon Chart
Need to Request
Requested
Not Seen Since
Not Relevant
Consolidated
Received
Good
Partially Good
Bad
Hold
Submitted

Fig. 140c

Fig. 141

When user right clicks on any "Forms", the following menu will appear

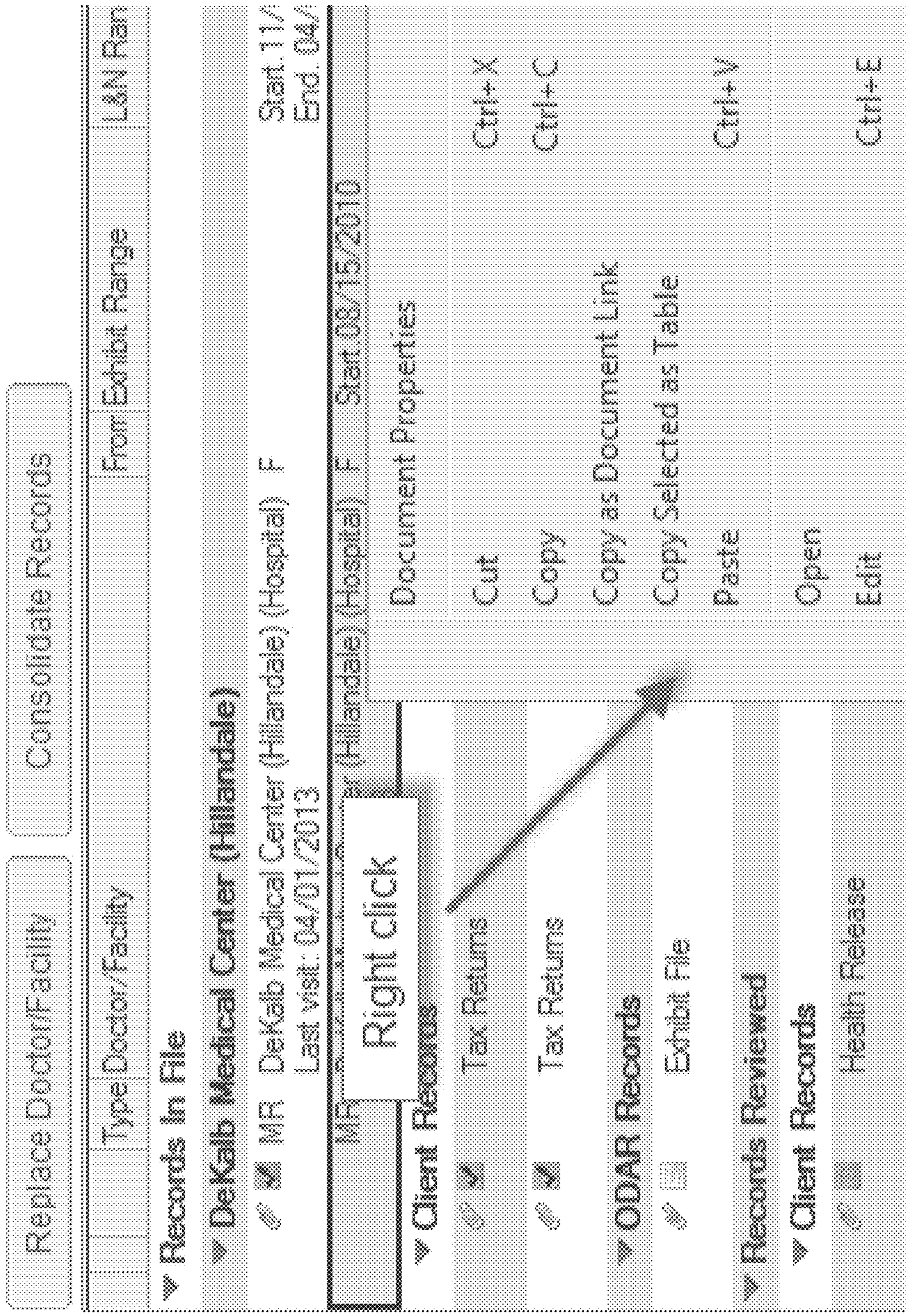


Fig. 142

Definitions of Preview File and Replace Doctor/Facility

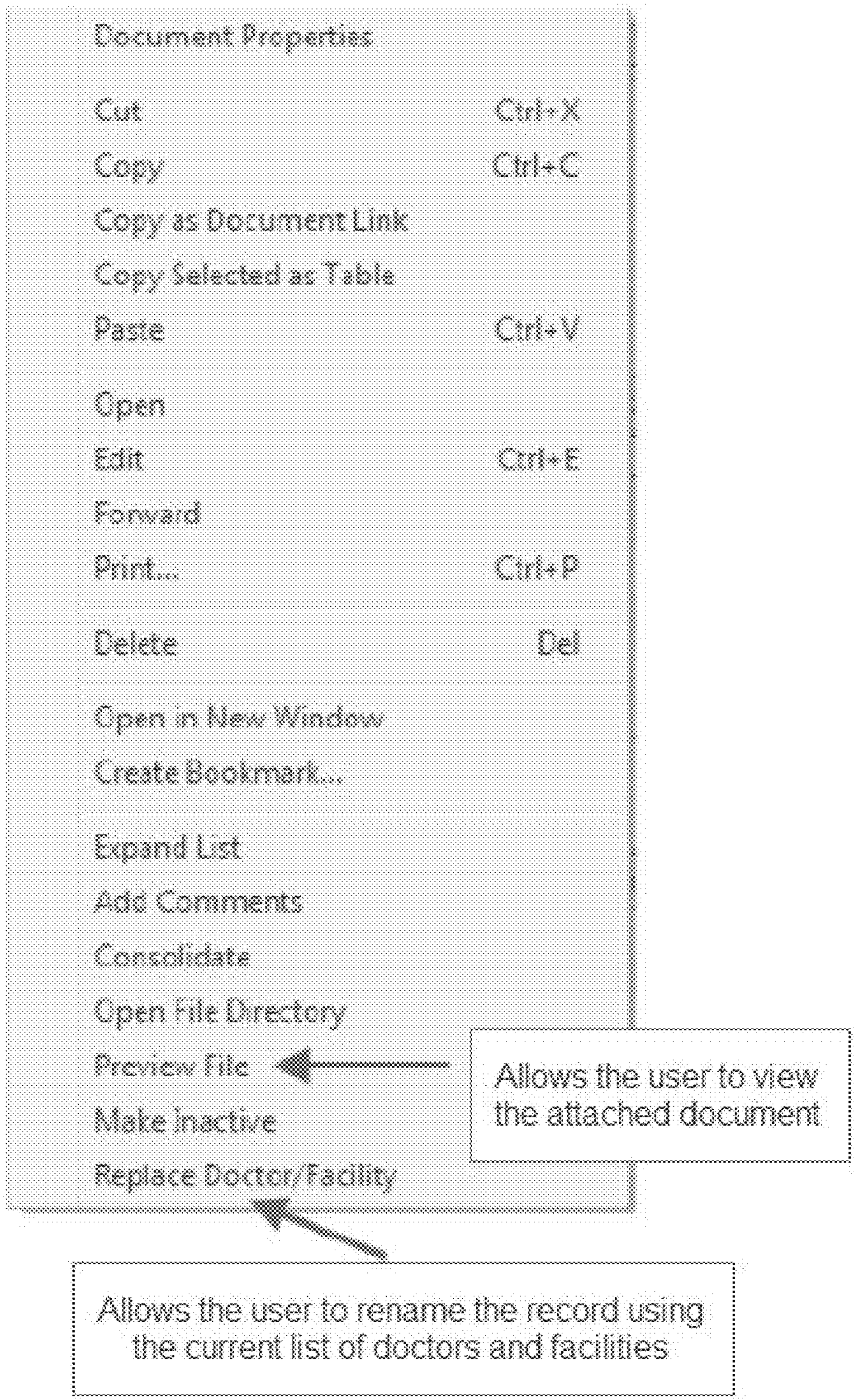


Fig. 143

When user right clicks on any entry from the doctors and facilities, the following menu will appear.

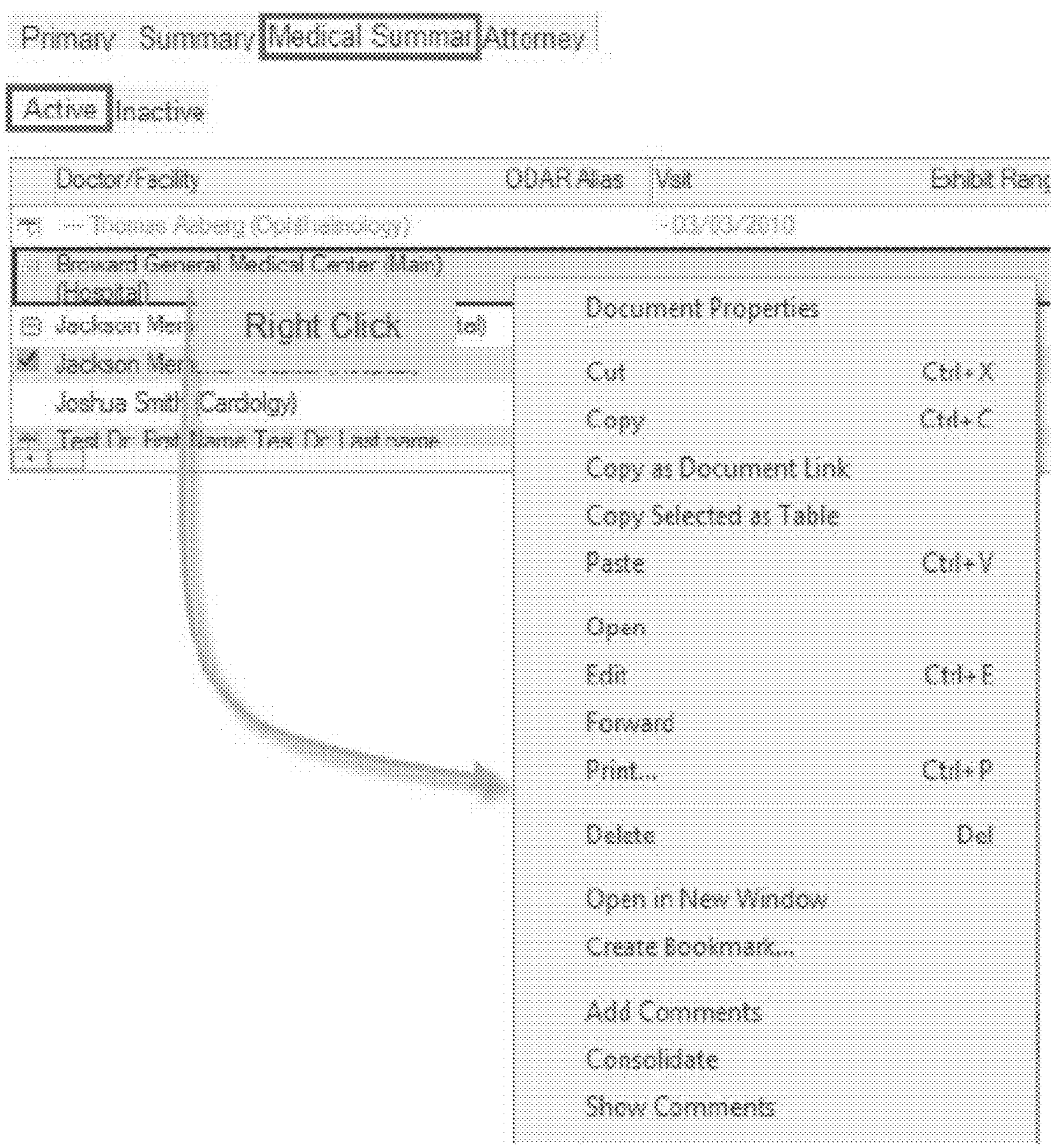


Fig. 144

Allows user to add a Comment to a Doctor/Facility

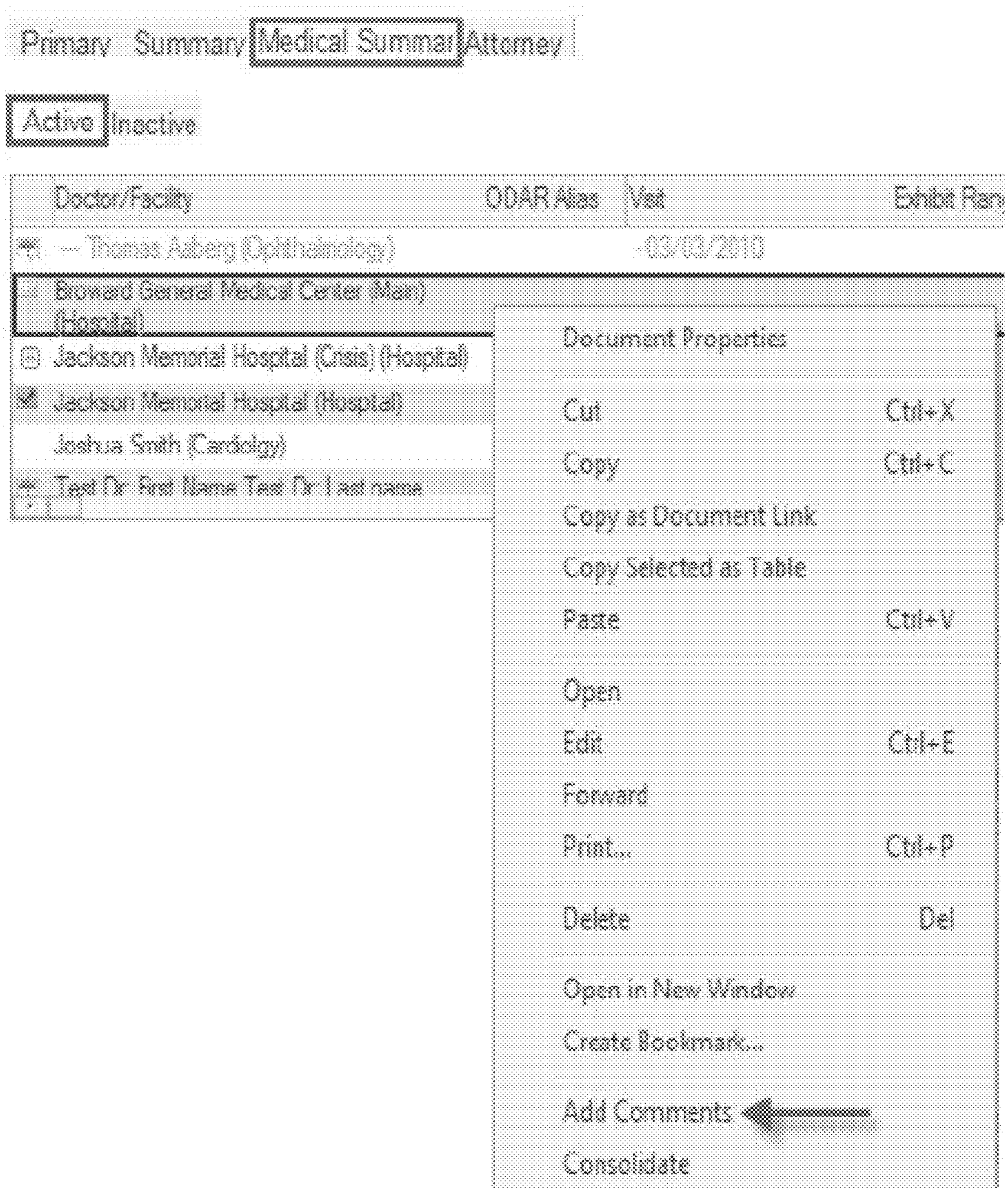


Fig. 145

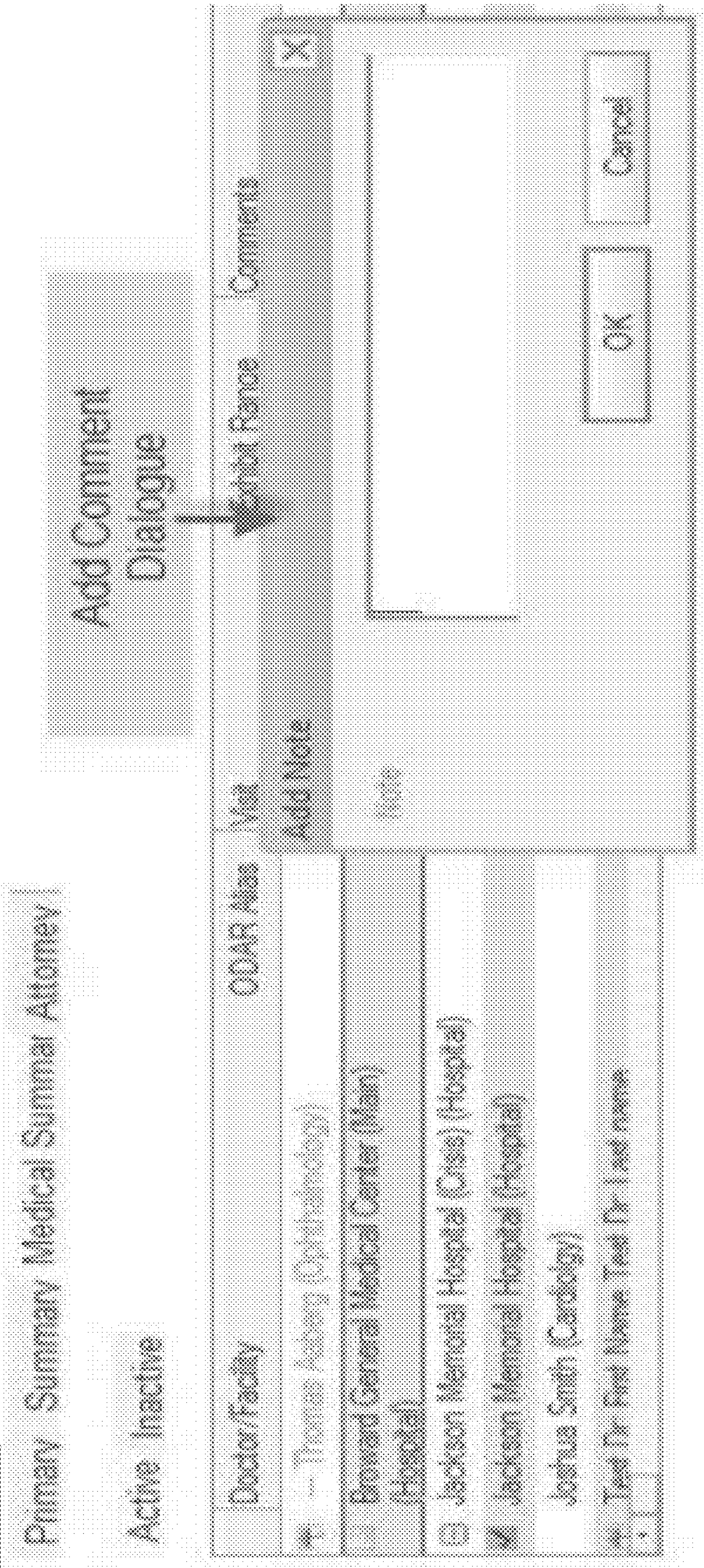

Primary Summary Medical Summar Attorney
Active Inactive
Add Comment Dialogue
Doctor/Facility
ODAR Alias
Visit
Add Note
Comments
OK
Cancel
Broward General Medical Center (Main) Hospital
Jackson Memorial Hospital (Hospital)
Joshua Smith (Cardiology)
Test Dr First Name Test Dr Last name

Fig. 146

The most recent "Comment" appears in this column. Gives the user a quick reference on most recent event.

Doctor/Facility	ODAR Alias	Visit	Exhibit Range	Comments
Aventura Hospital (Hospital)				
Baptist Hospital (Miami) (Hospital)				heart surgery 2009
— George Smith (Cardiologist)				
Jackson Memorial Hospital (Hospital)				
Kendall Medical Center (Primary care)				
Mariners Hospital (Hospital)				

Fig 147

When the user selects Show Comments in this dialogue a history of comments will appear

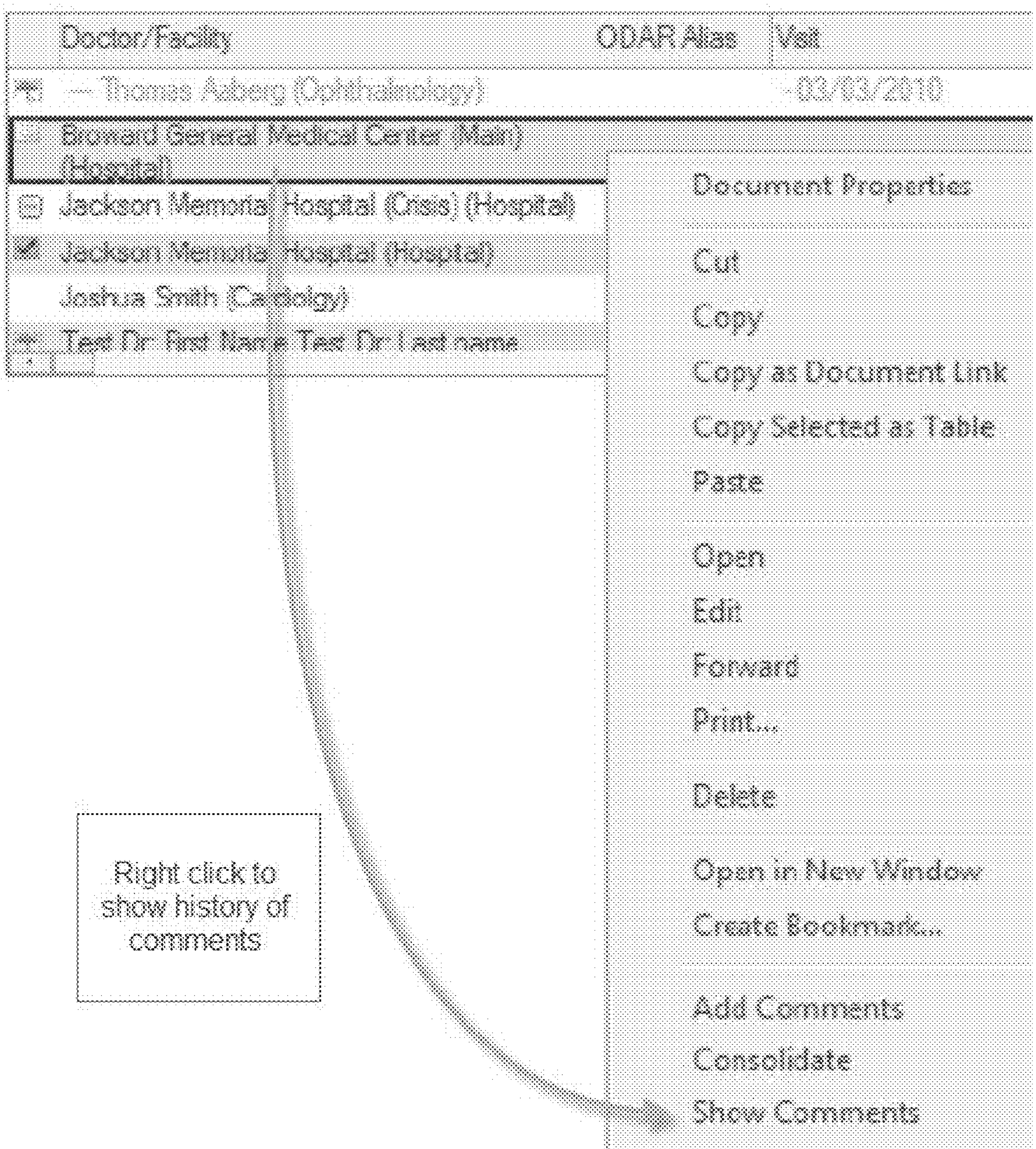


Fig. 148

History of Comments window.

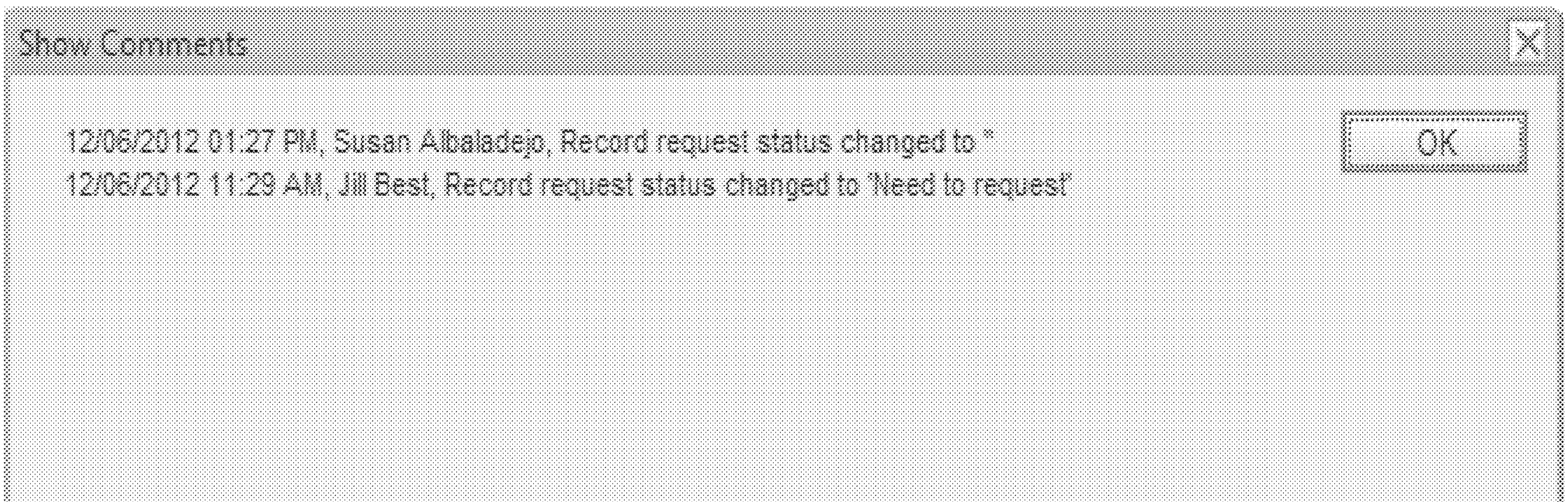


Fig. 149

To prevent duplicate requests users can Consolidate a Doctor to a subset of a facility.

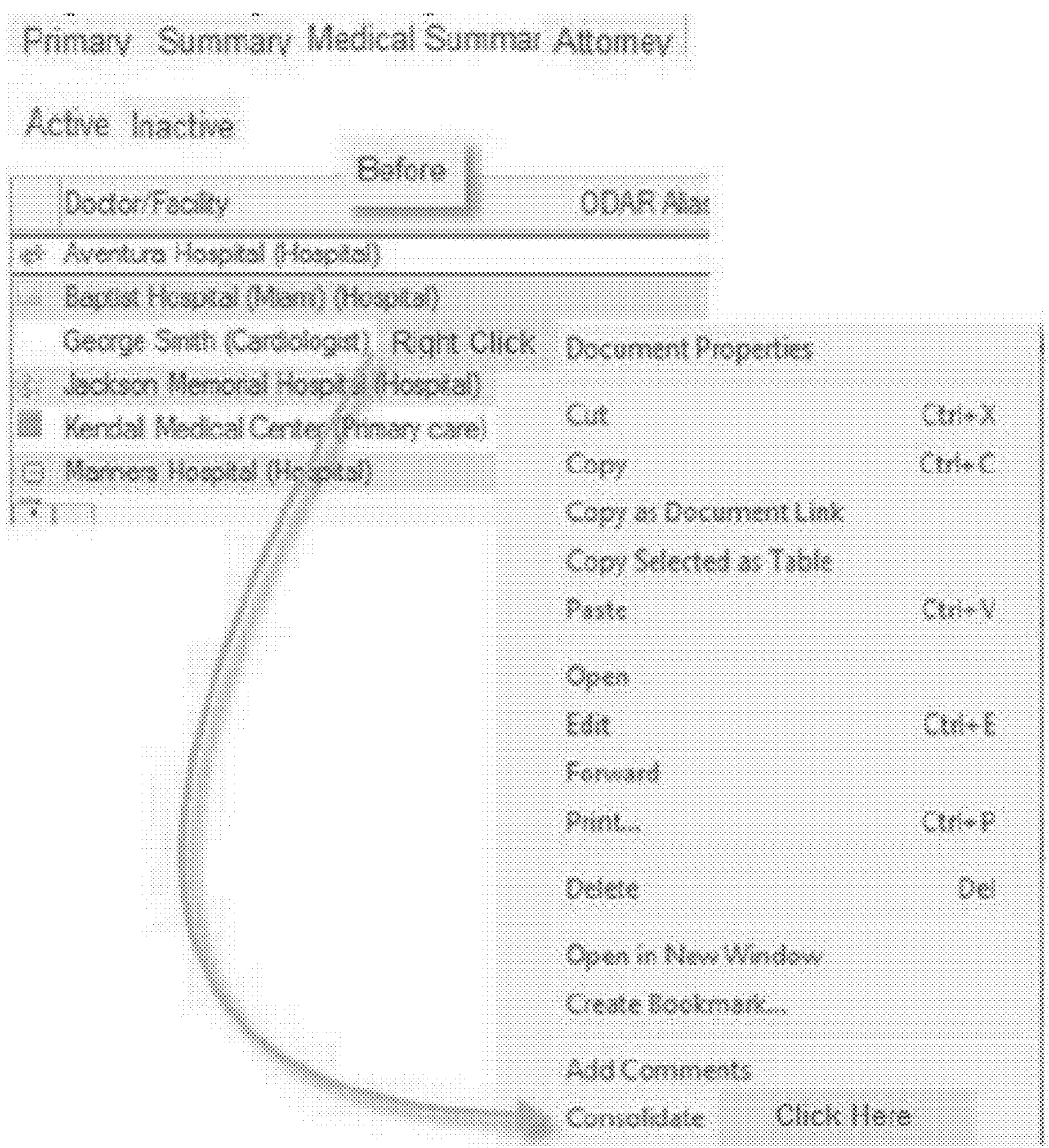


Fig. 150

Consolidate view appears, allowing user to merge a Doctor with a Facility.

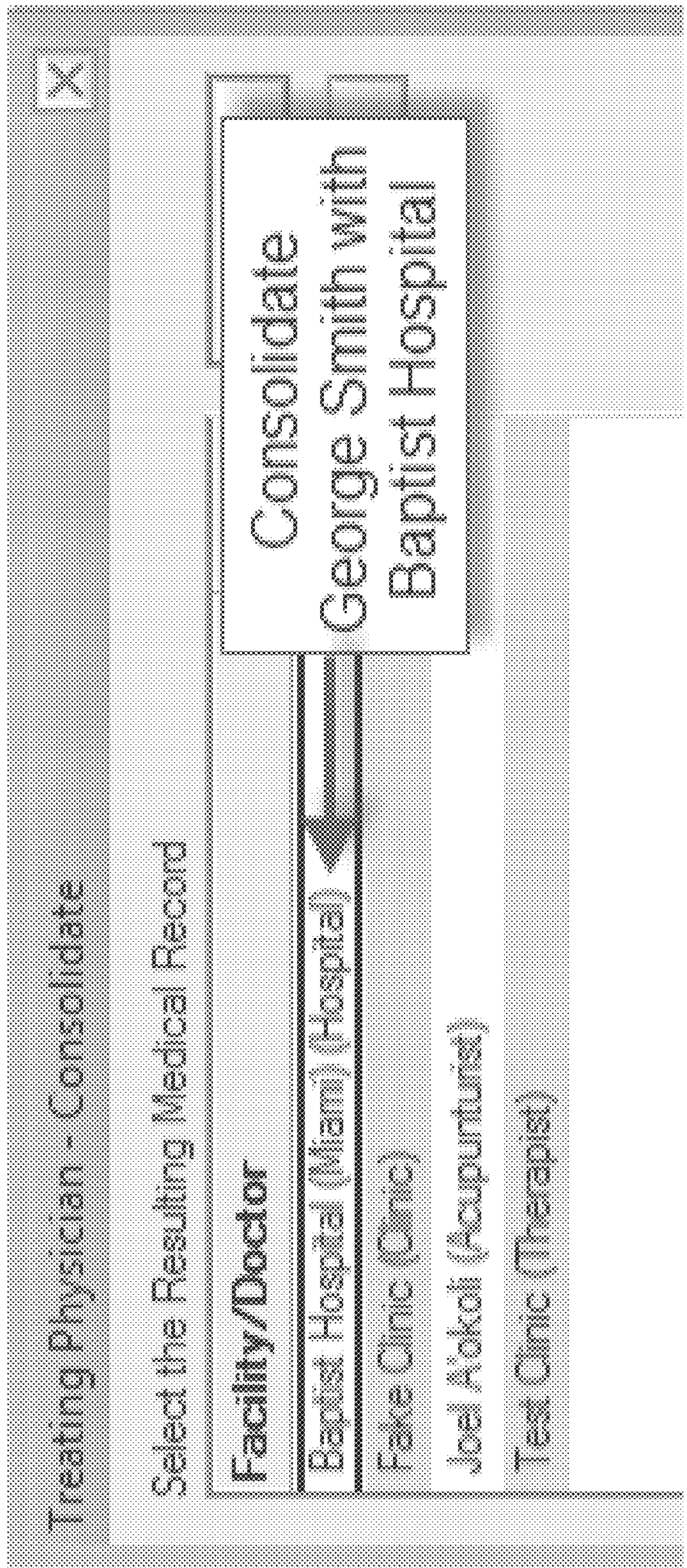


Fig. 151

George Smith is now a doctor within Baptist Hospital

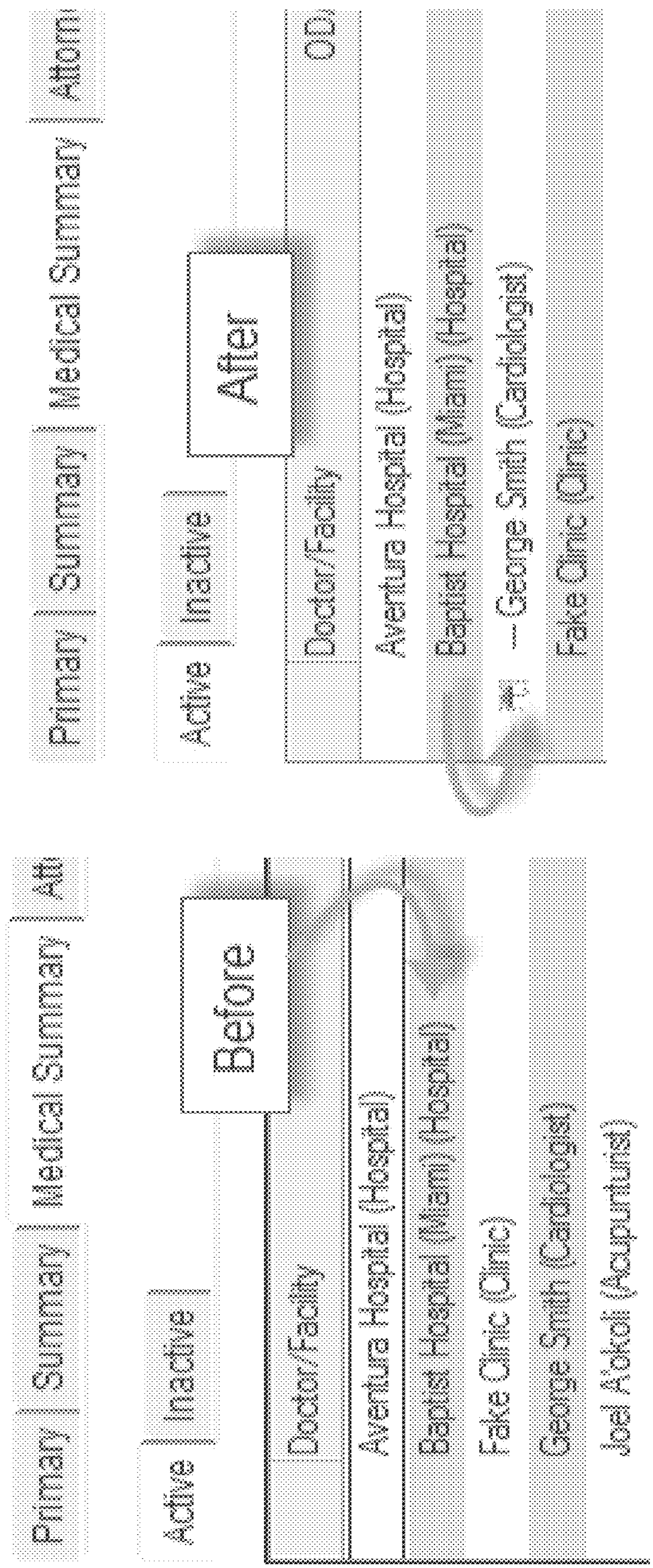
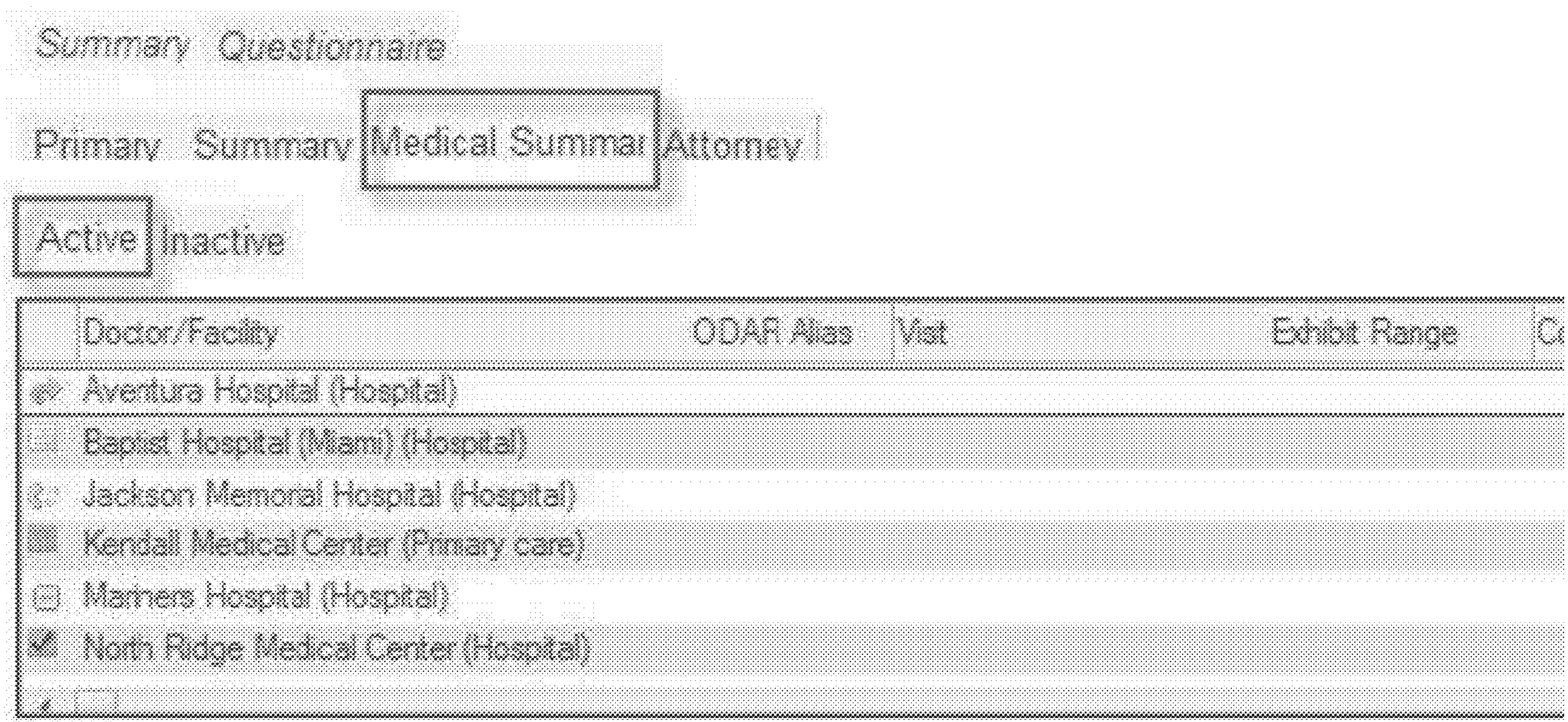


Fig. 152a

All previous print screens have related to Active Doctors/Facilities. The following will demonstrate how to move a treating source from Active to Inactive. The Inactive tab helps keep the file organized and current.



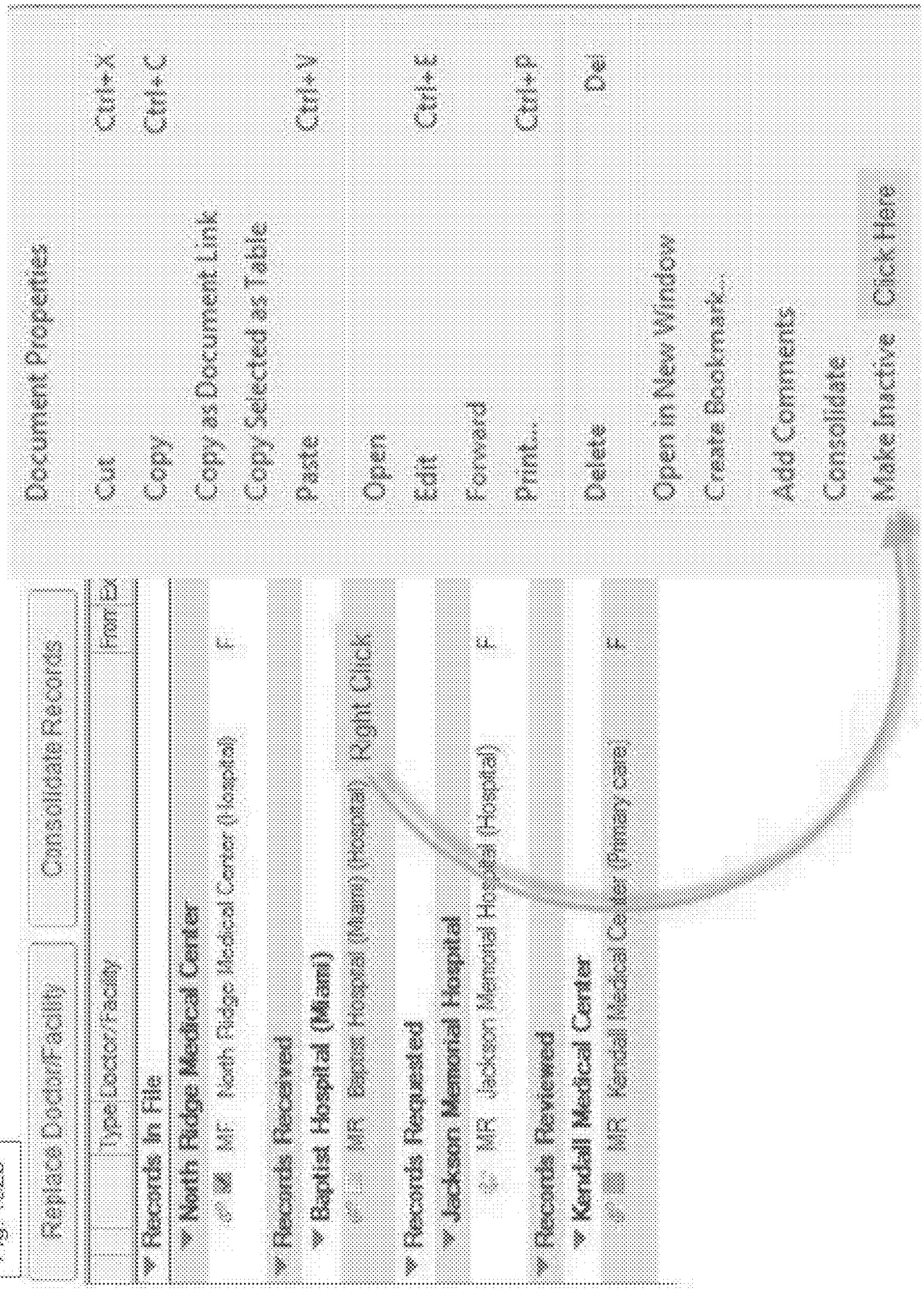

Replace Doctor/Facility
Consolidate Records
Type Doctor/Facility
Records In File
North Ridge Medical Center
MF North Ridge Medical Center (Hospital)
F
Records Received
Baptist Hospital (Miami)
MR Baptist Hospital (Miami) (Hospital)
Right Click
Records Requested
Jackson Memorial Hospital
MR Jackson Memorial Hospital (Hospital)
F
Records Reviewed
Kendall Medical Center
MR Kendall Medical Center (Primary care)
F
Document Properties
Cut Ctrl+X
Copy Ctrl+C
Copy as Document Link
Copy Selected as Table
Paste Ctrl+V
Open
Edit Ctrl+E
Forward
Print... Ctrl+P
Delete Del
Open in New Window
Create Bookmark...
Add Comments
Consolidate
Make Inactive
Click Here

Fig. 152b

Fig. 153

User must verify making a Doctor/Facility Inactive by completing the Removal Windows.

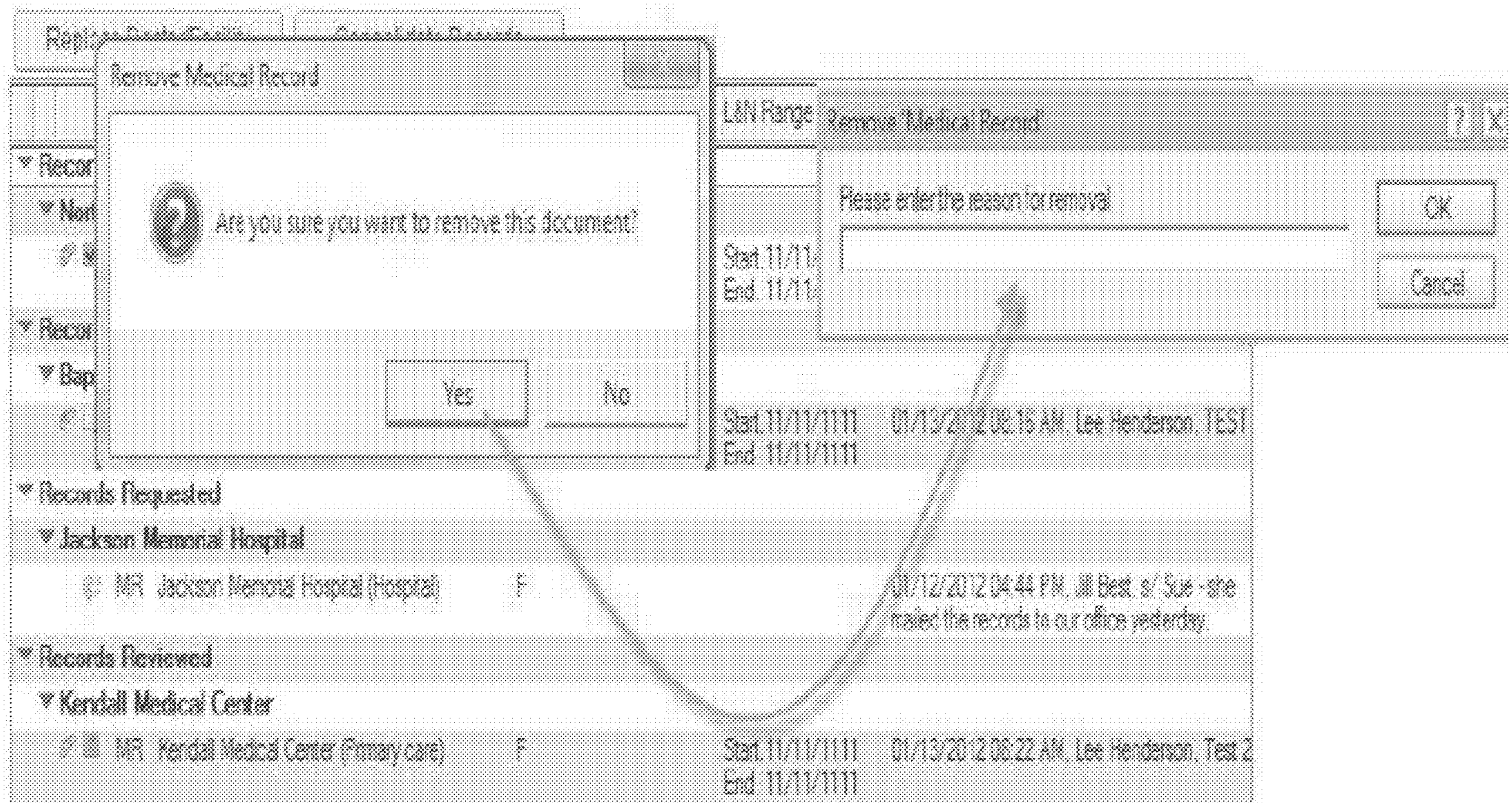


Fig. 154

The Doctor/Facility now appears on the Inactive Tab.

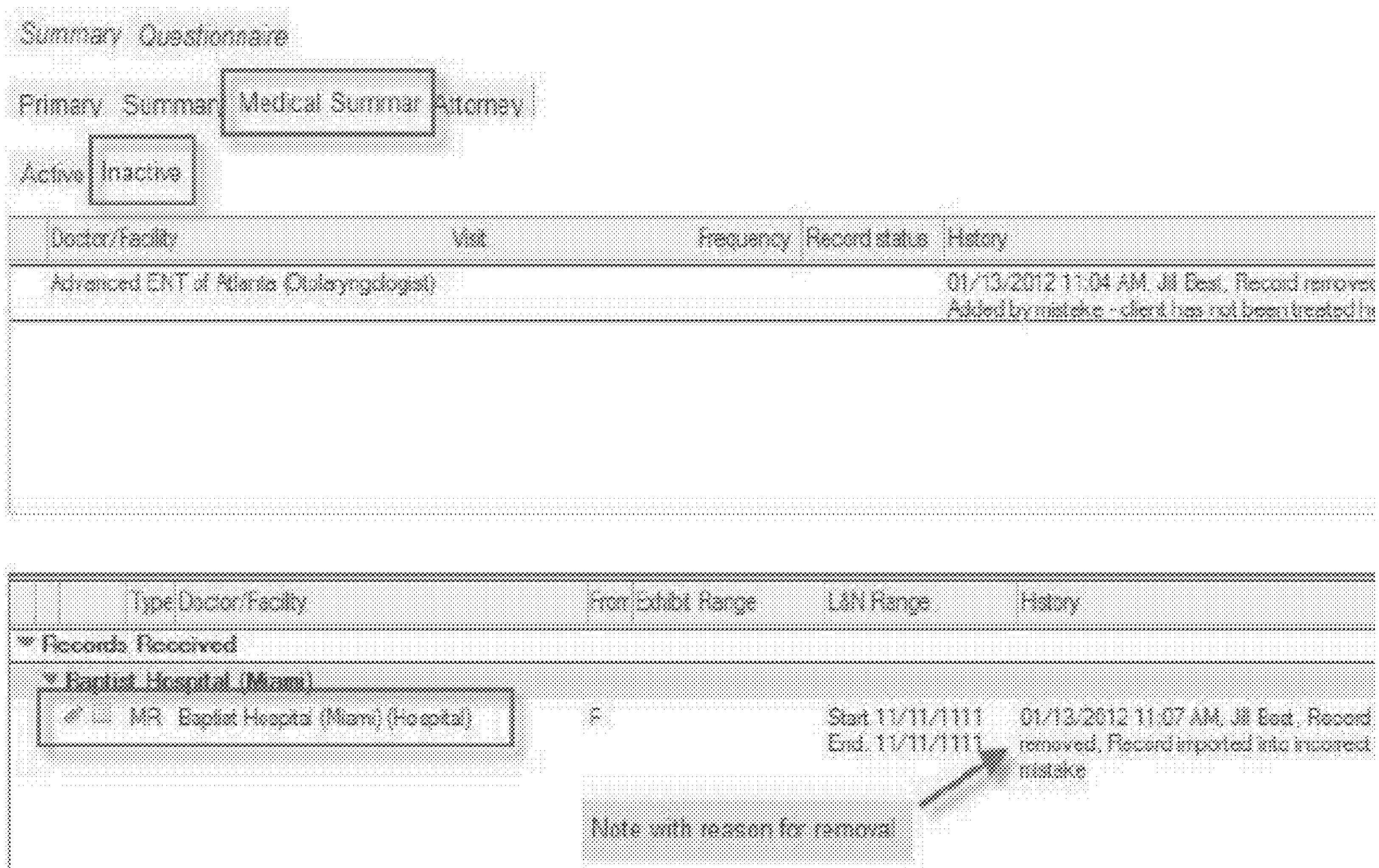


Fig. 155

The user may return the item to the Active Tab.

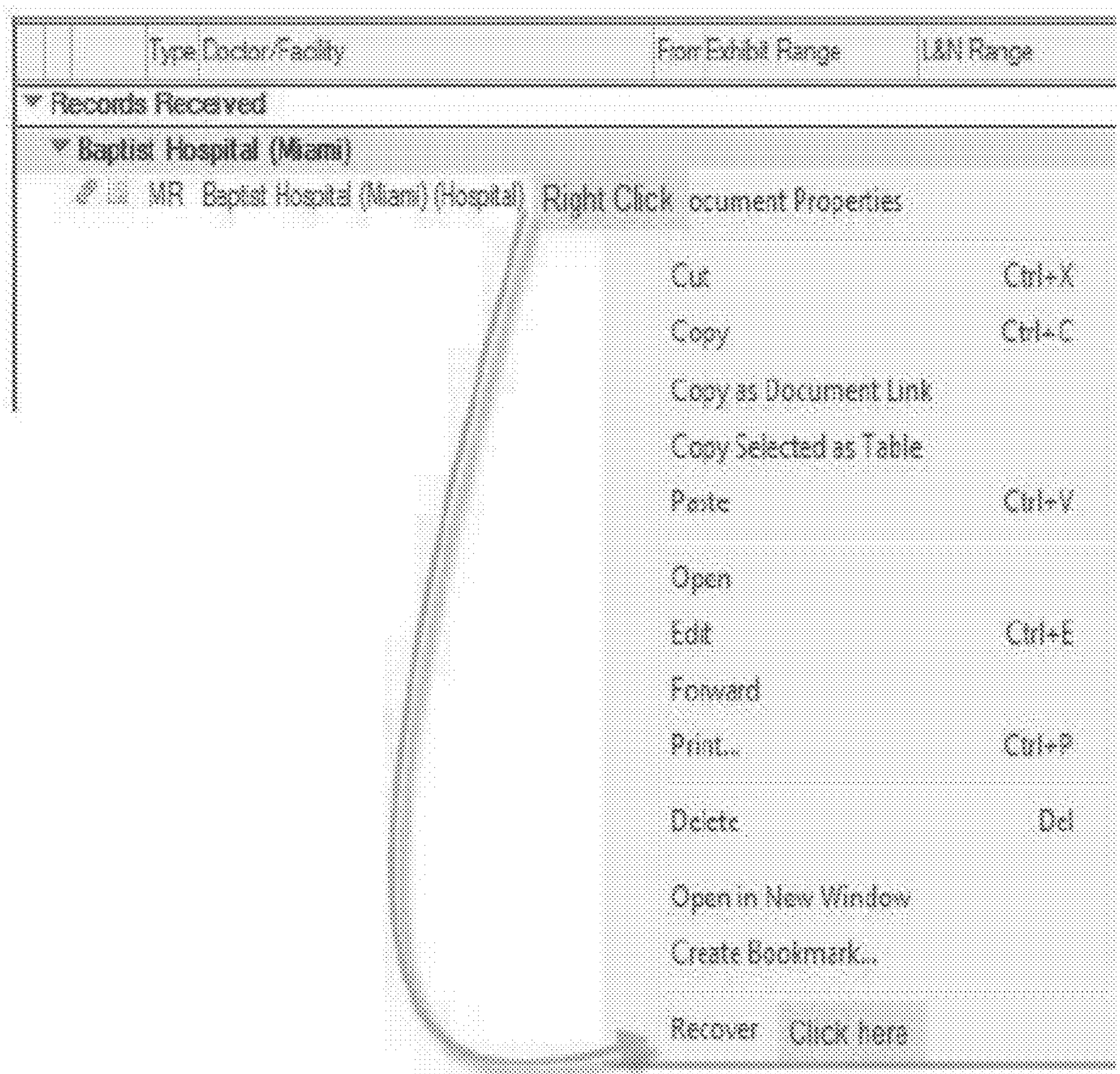


Fig 156a

Forms

Each record associated with a contact, regardless of its status, will have a corresponding form located on the contact's Medical Summary. The form provides the user with helpful information regarding the record, such as the status of the record and the treating source's contact information. The actual record may be attached to the form and accessible here by the user. The user may also update the form as needed to store additional useful information.

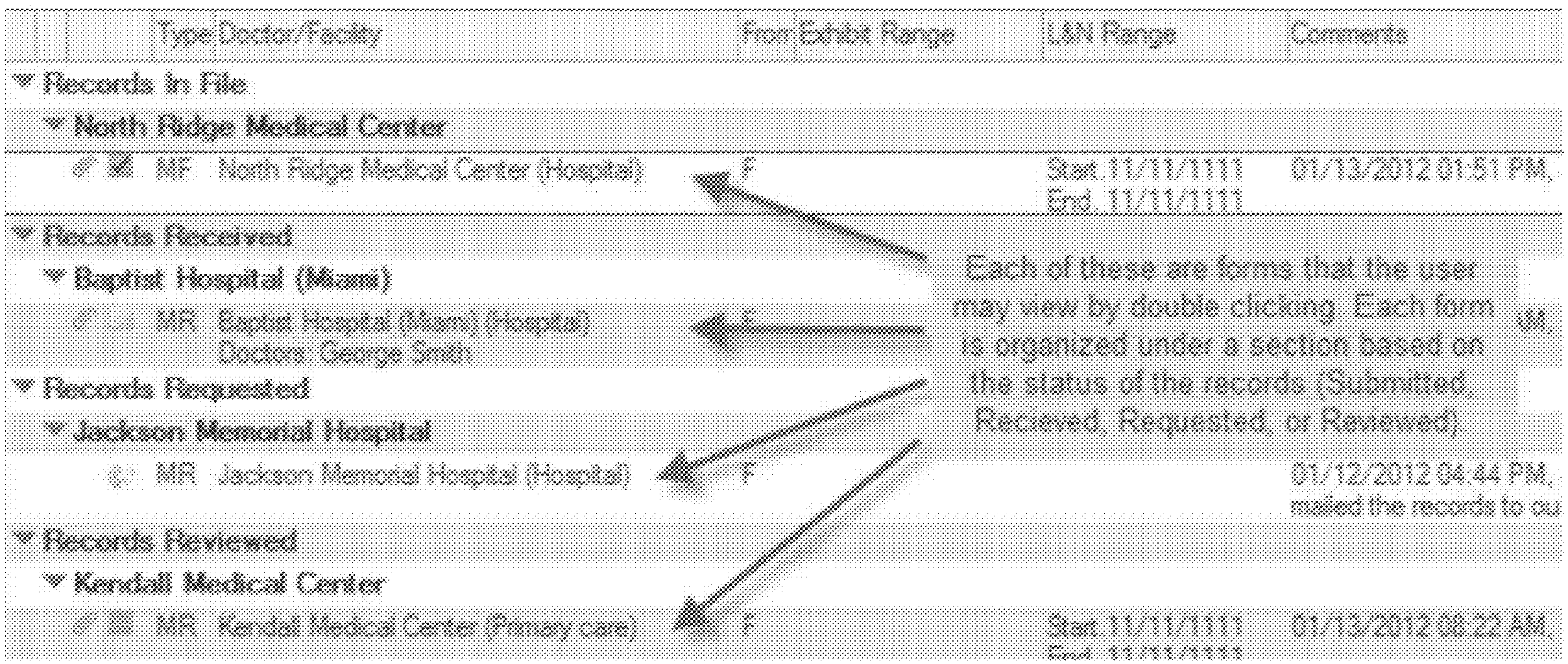


Fig. 156b

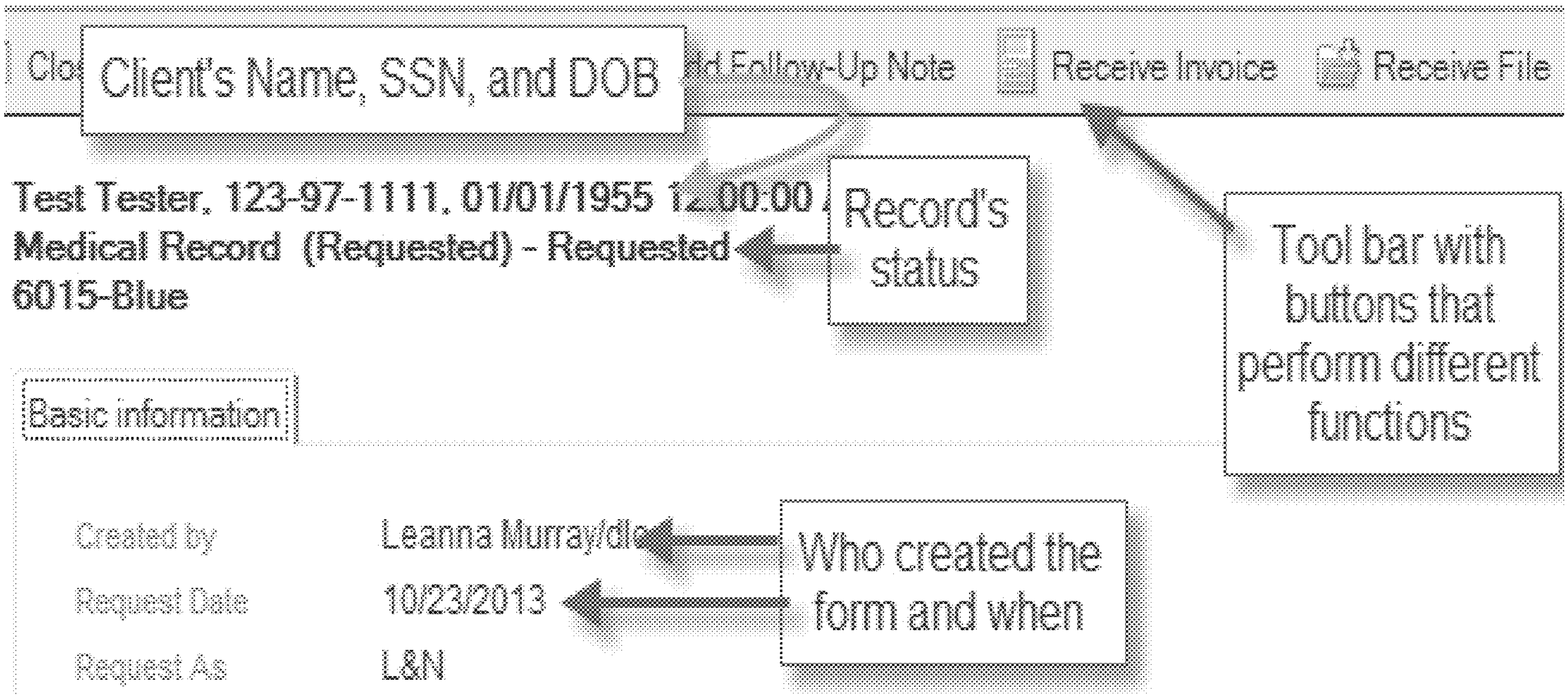
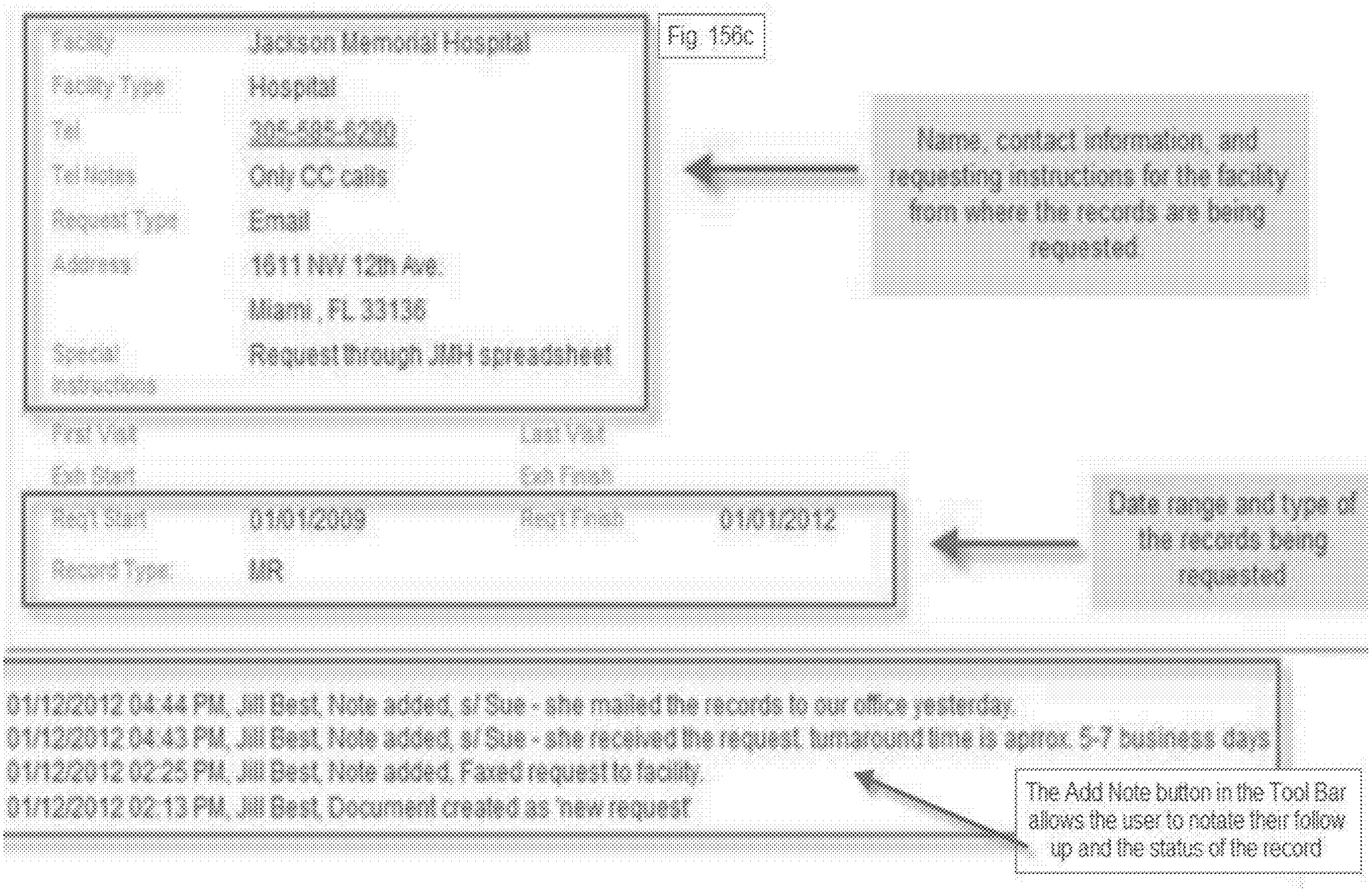

Clo
Client's Name, SSN, and DOB
Follow-Up Note
Receive Invoice
Receive File
Tool bar with buttons that perform different functions
Test Tester, 123-97-1111, 01/01/1955 12:00:00
Medical Record (Requested) - Requested
6015-Blue
Record's status
Basic information
Created by
Leanna Murray/dl
Request Date
10/23/2013
Request As
L&N
Who created the form and when

Fig 156c


Facility
Jackson Memorial Hospital
Facility Type
Hospital
Tel
305-585-6290
Tel Notes
Only CC calls
Request Type
Email
Address
1611 NW 12th Ave.
Miami , FL 33136
Special Instructions
Request through JMH spreadsheet
First Visit
Last Visit
Exh Start
Exh Finish
Req't Start
01/01/2009
Req't Finish
01/01/2012
Record Type
MR
Name, contact information, and requesting instructions for the facility from where the records are being requested
Date range and type of the records being requested
01/12/2012 04:44 PM, Jill Best, Note added, s/ Sue - she mailed the records to our office yesterday.
01/12/2012 04:43 PM, Jill Best, Note added, s/ Sue - she received the request, turnaround time is aprox. 5-7 business days
01/12/2012 02:25 PM, Jill Best, Note added, Faxed request to facility.
01/12/2012 02:13 PM, Jill Best, Document created as 'new request'
The Add Note button in the Tool Bar allows the user to notate their follow up and the status of the record

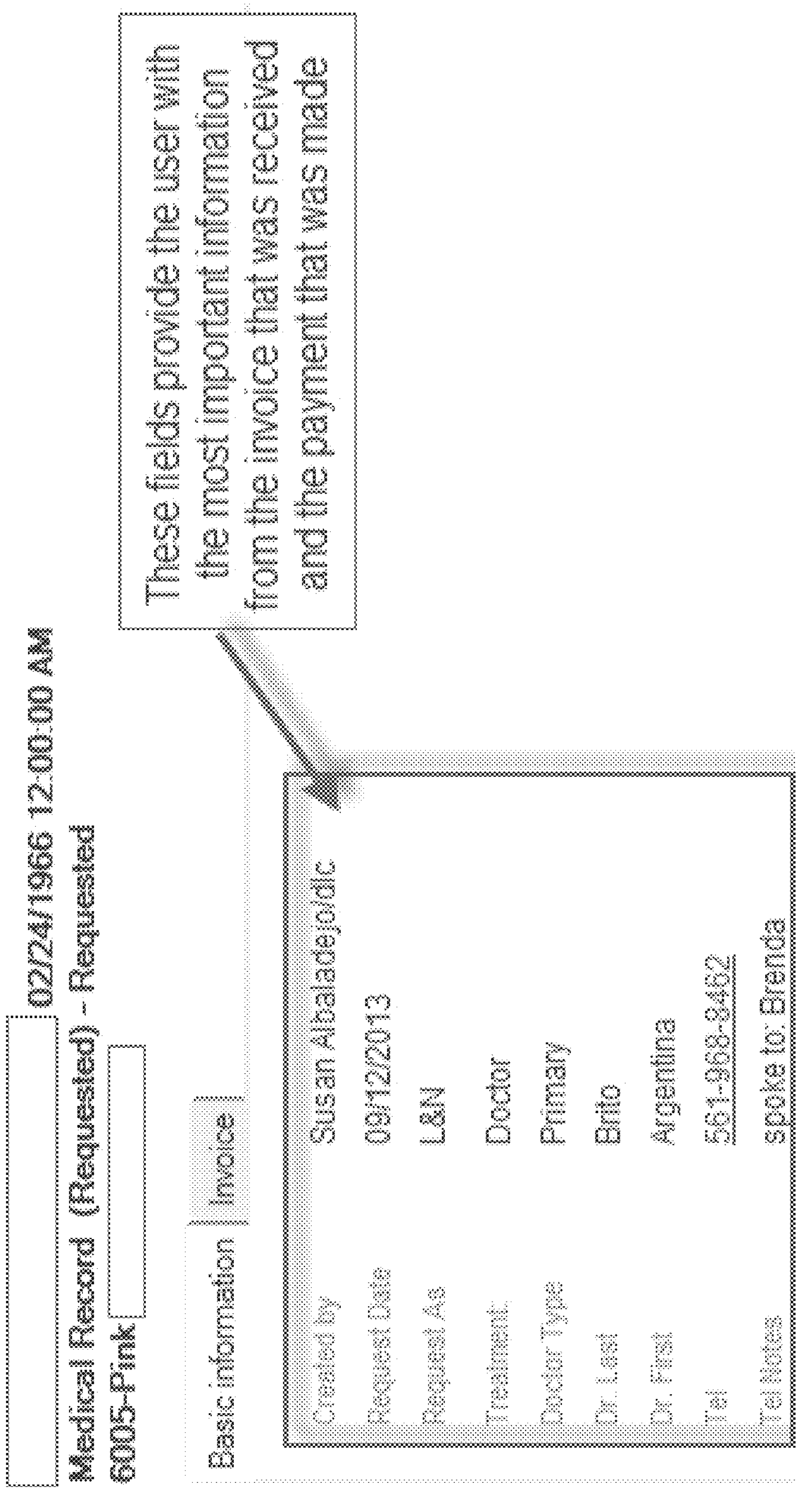

02/24/1966 12:00:00 AM
Medical Record (Requested) - Requested
6005-Pink
Basic information
Invoice
Created by
Susan Albaladejo/dlc
Request Date
09/12/2013
Request As
L&N
Treatment
Doctor
Doctor Type
Primary
Dr. Last
Brito
Dr. First
Argentina
Tel
561-968-8462
Tel Notes
spoke to: Brenda
These fields provide the user with the most important information from the invoice that was received and the payment that was made

Fig. 157a

Fig. 157b

Invoice Tab

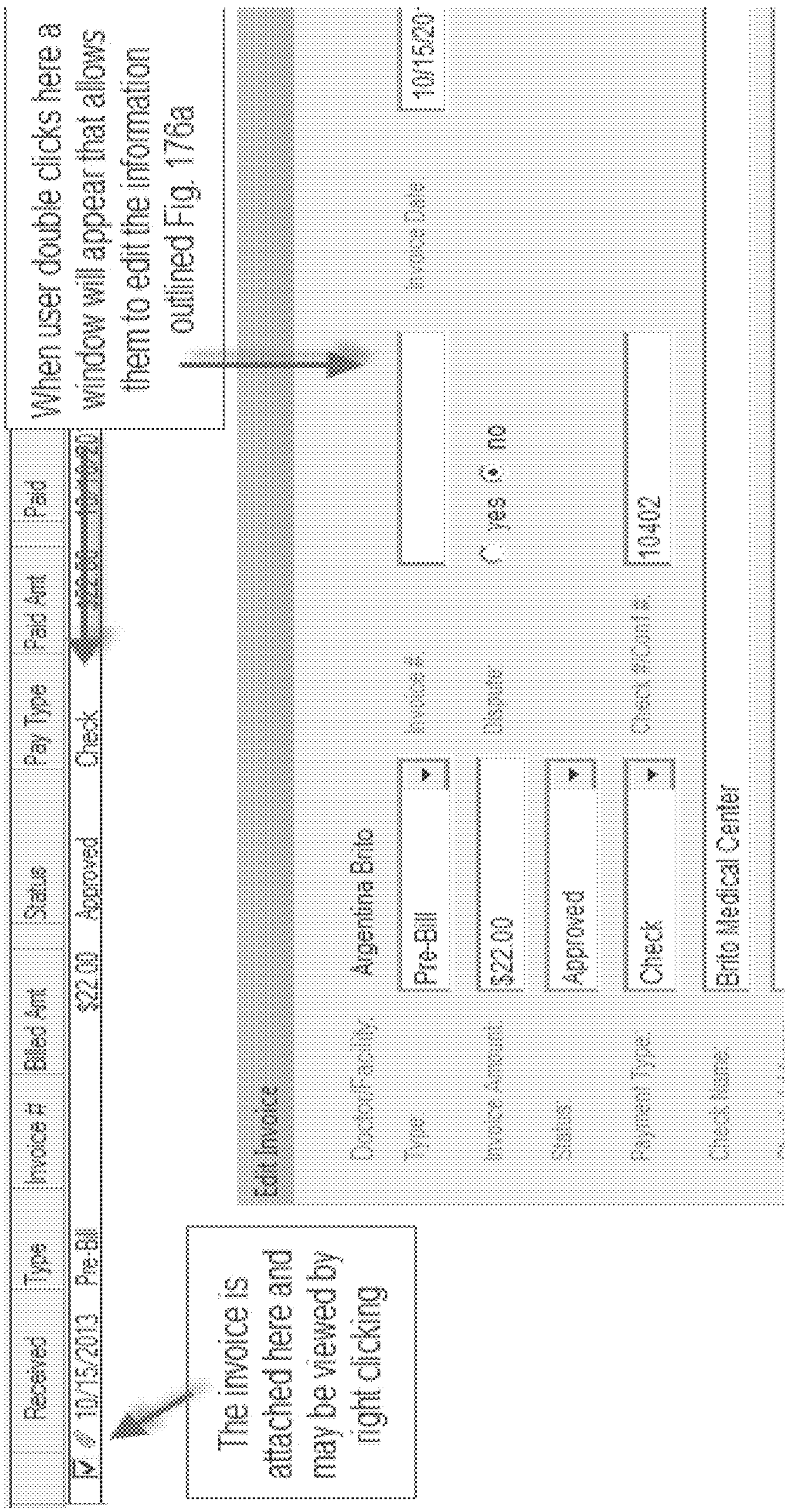


Fig. 158

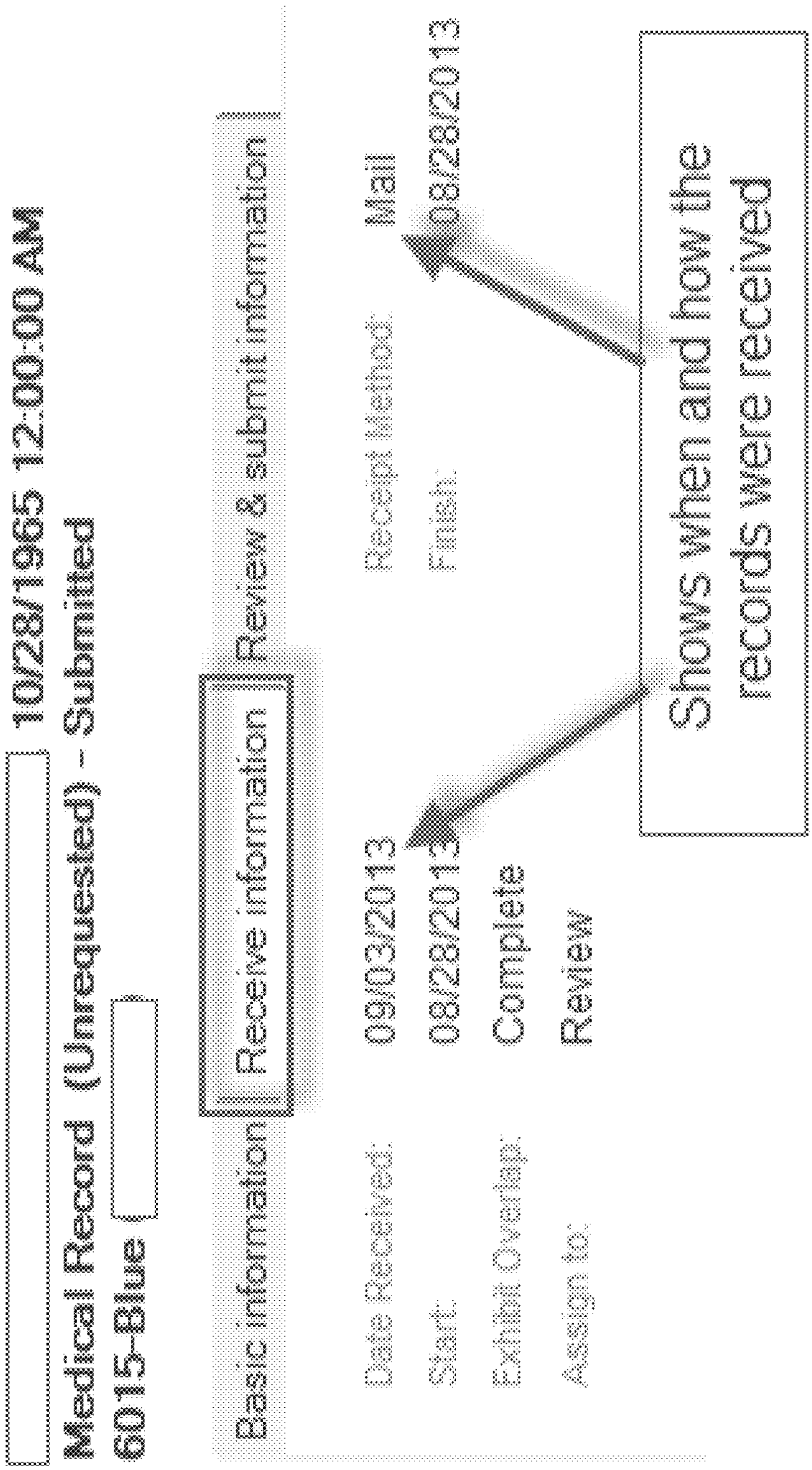

10/28/1965 12:00:00 AM
Medical Record (Unrequested) - Submitted
6015-Blue
Basic information
Receive information
Review & submit information
Date Received:
09/03/2013
Receipt Method:
Mail
Start:
08/28/2013
Finish:
08/28/2013
Exhibit Overlap:
Complete
Assign to:
Review
Shows when and how the records were received

Fig. 159

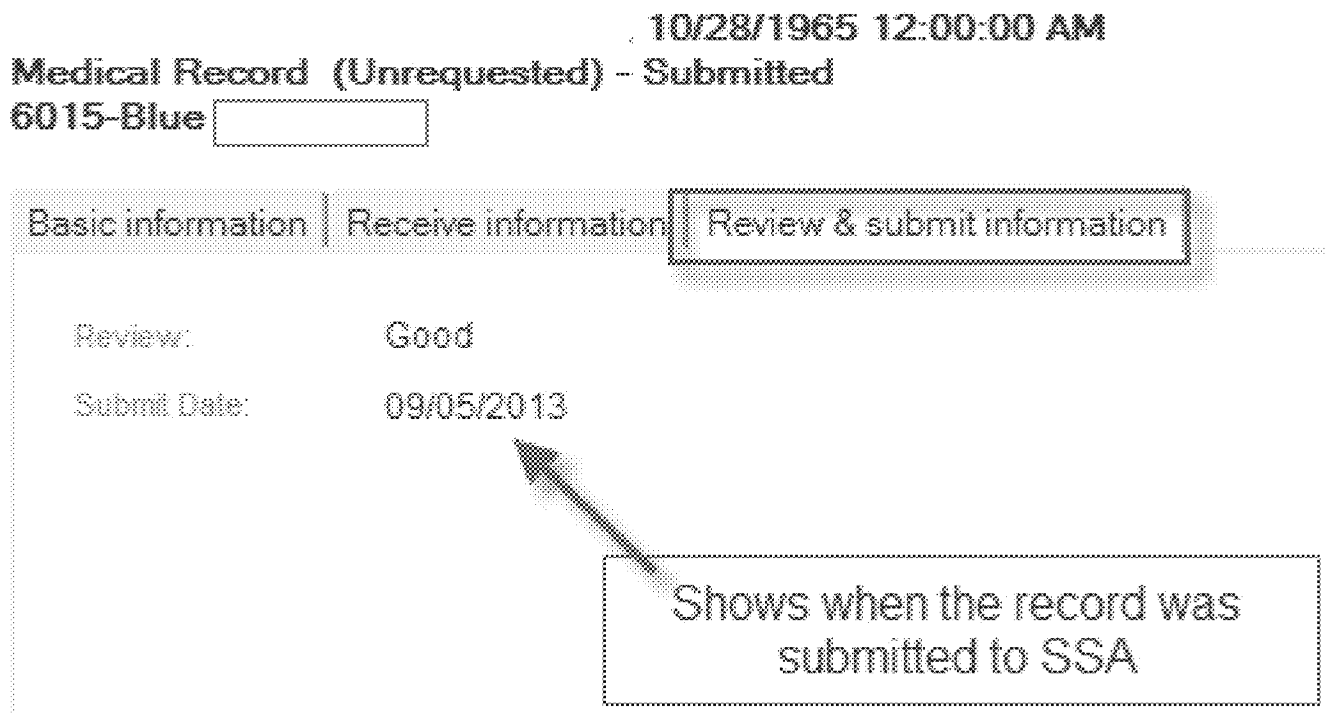

10/28/1965 12:00:00 AM
Medical Record (Unrequested) - Submitted
6015-Blue
Basic information
Receive information
Review & submit information
Review:
Good
Submit Date:
09/05/2013
Shows when the record was submitted to SSA

Fig. 160

Add Physician & Generate Request

The following print screens show how information regarding the medical sources where a contact has received treatment is added to their personal file. Users have access to previously stored information for commonly used treating sources and may update and add to this stored information at any time. The information is used to request medical records for the contact's Social Security disability claim.

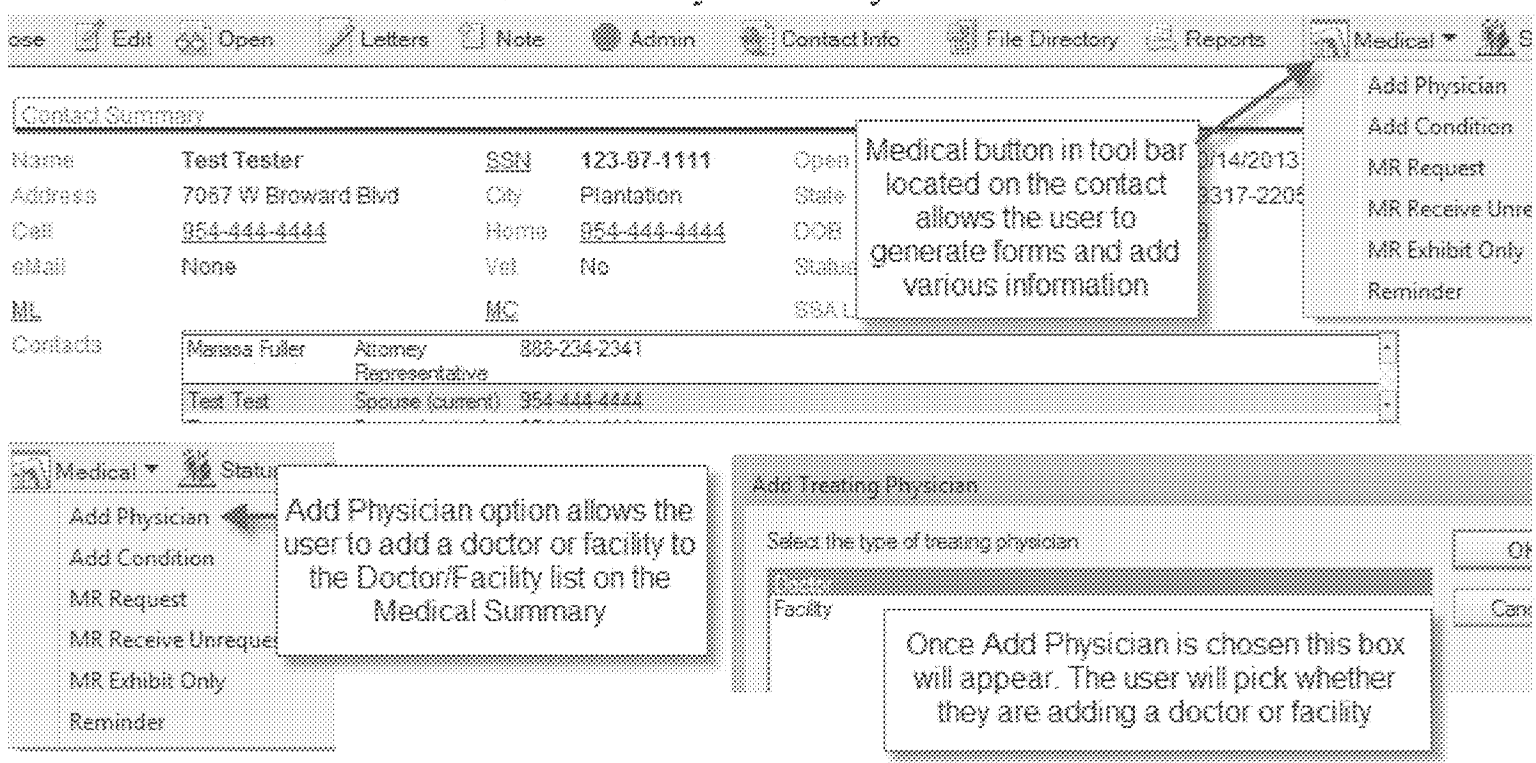
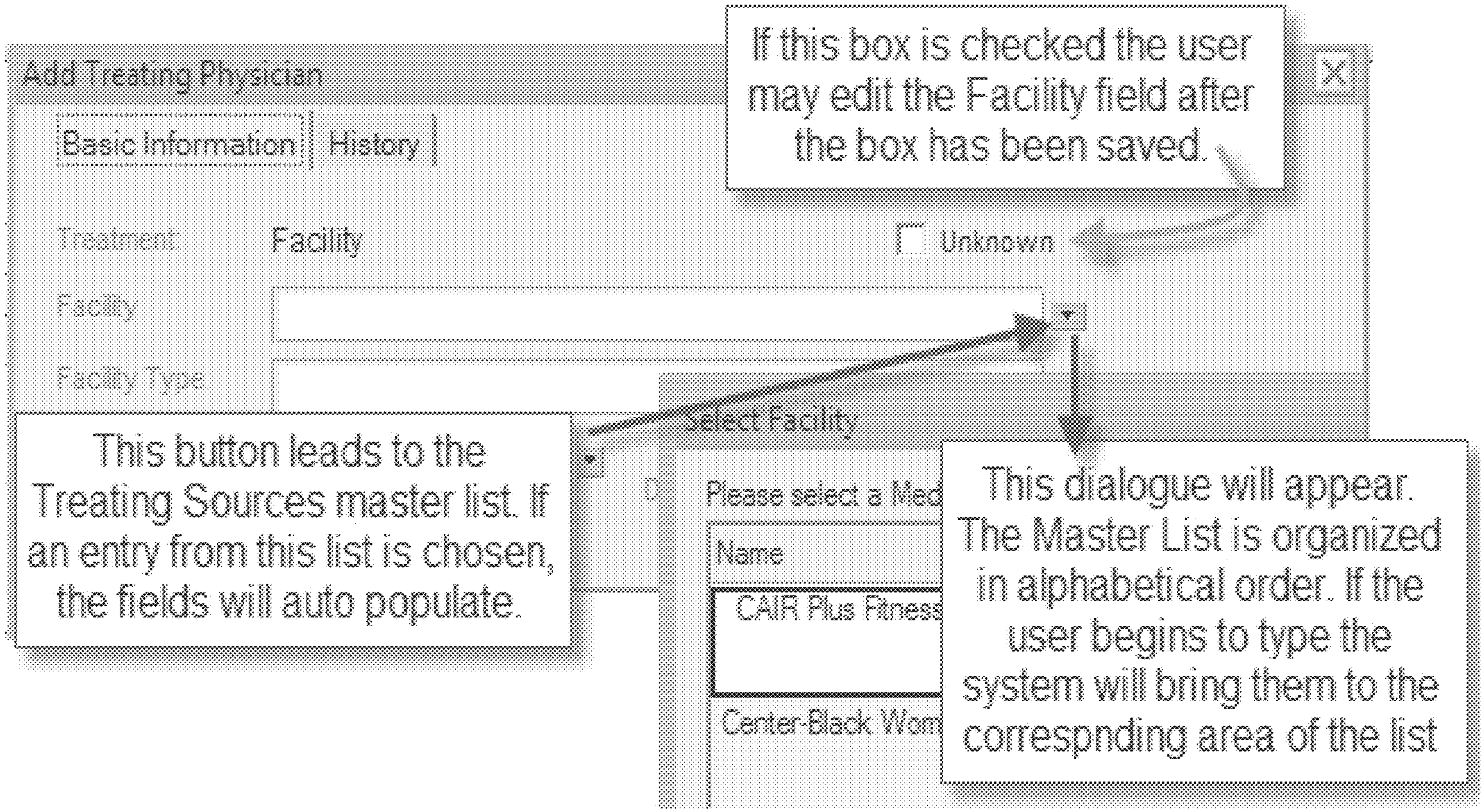


Fig. 161

Once Doctor or Facility is chosen this box will appear. The user will enter information about the Doctor/Facility in the corresponding fields. All fields may always be edited.



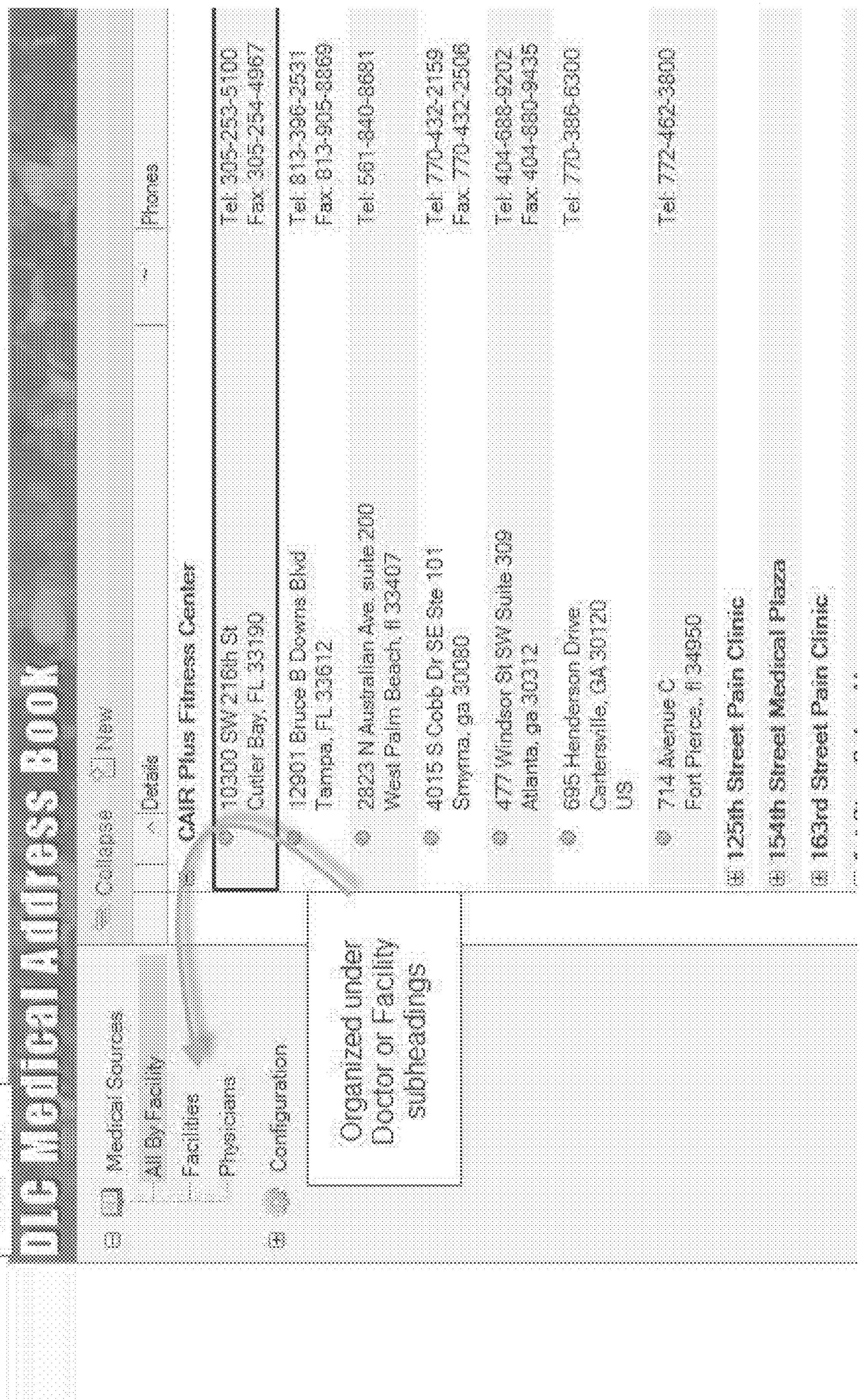

DLC Medical Address Book
Medical Sources
All By Facility
Facilities
Physicians
Configuration
Collapse
New
Details
Phones
CAIR Plus Fitness Center
10300 SW 216th St
Cutler Bay, FL 33190
Tel: 305-253-5100
Fax: 305-254-4967
12901 Bruce B Downs Blvd
Tampa, FL 33612
Tel: 813-396-2531
Fax: 813-905-8869
2823 N Australian Ave. suite 200
West Palm Beach, fl 33407
Tel: 561-840-8681
4015 S Cobb Dr SE Ste 101
Smyrna, ga 30080
Tel: 770-432-2159
Fax: 770-432-2506
477 Windsor St SW Suite 309
Atlanta, ga 30312
Tel: 404-688-9202
Fax: 404-880-9435
695 Henderson Drive
Cartersville, GA 30120
US
Tel: 770-386-6300
714 Avenue C
Fort Pierce,, fl 34950
Tel: 772-462-3800
125th Street Pain Clinic
154th Street Medical Plaza
163rd Street Pain Clinic
Organized under Doctor or Facility subheadings

Fig. 162

Fig. 163

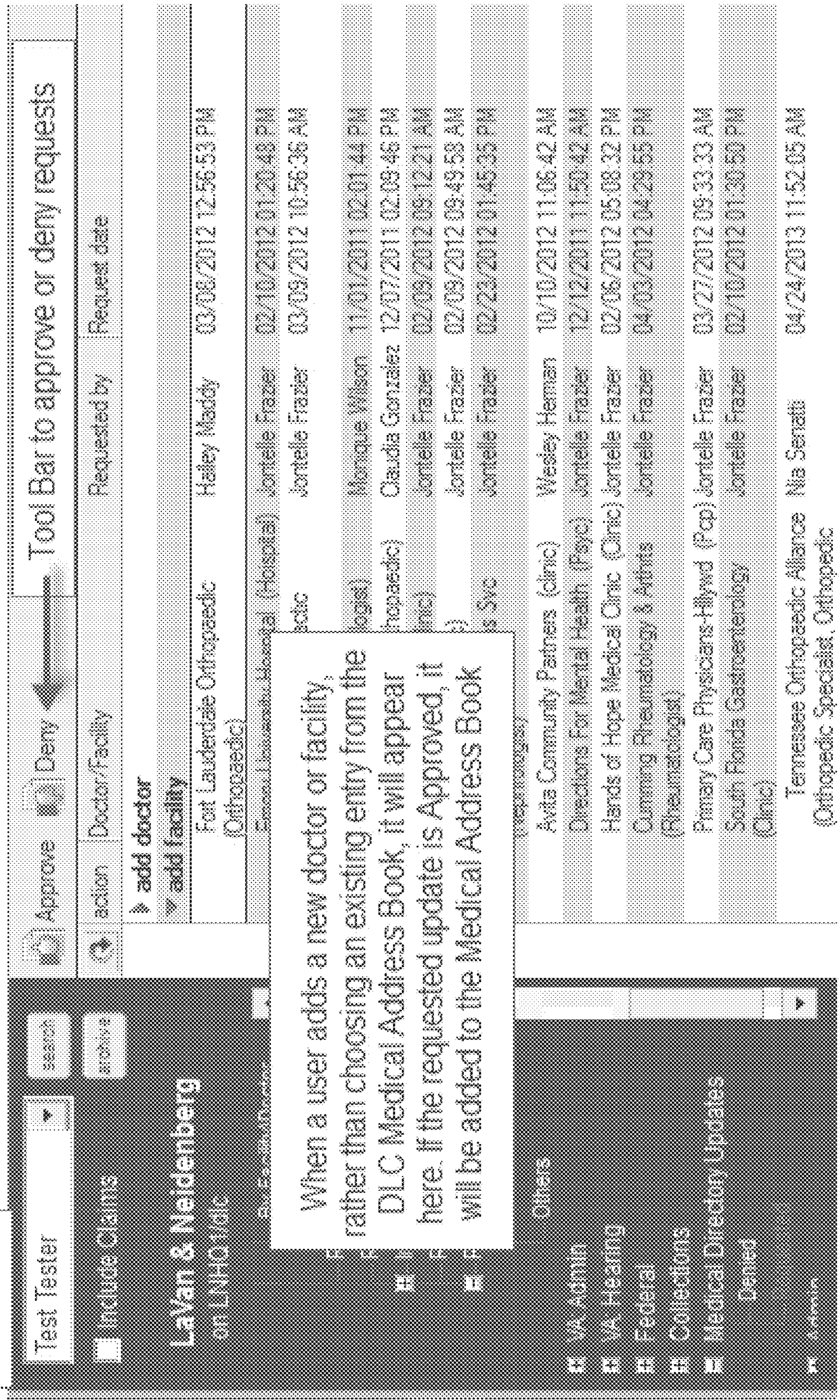

Tool Bar to approve or deny requests
When a user adds a new doctor or facility, rather than choosing an existing entry from the DLC Medical Address Book, it will appear here. If the requested update is Approved, it will be added to the Medical Address Book

Fig. 164a

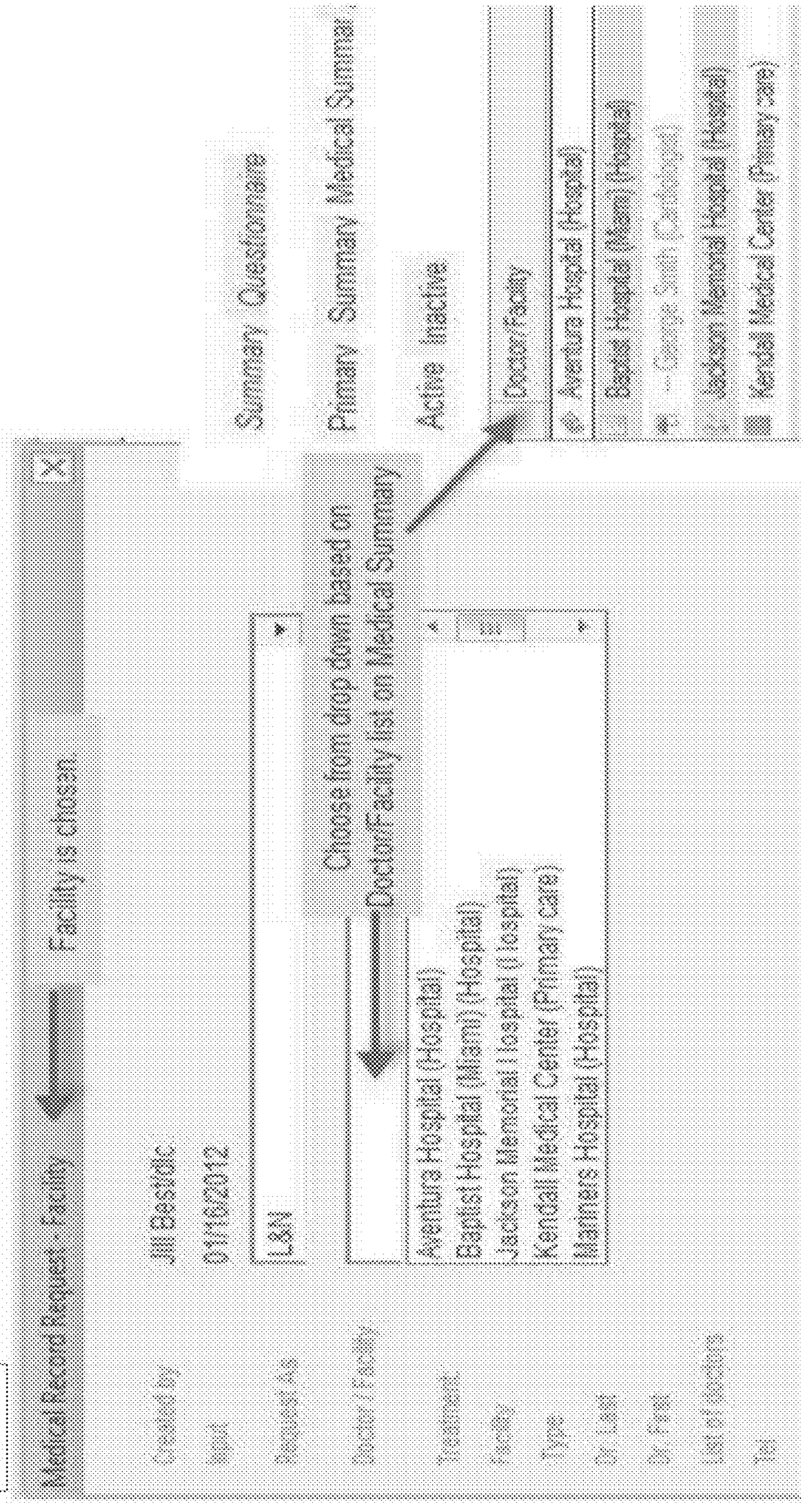

Facility is chosen
01/16/2012
L&M
Choose from drop down based on
Doctor/Facility list on Medical Summary
Aventura Hospital (Hospital)
Baptist Hospital (Miami) (Hospital)
Jackson Memorial Hospital (Hospital)
Kendall Medical Center (Primary care)
Mariners Hospital (Hospital)
Summary Questionnaire
Primary Summary Medical Summary
Active Inactive
Doctor/Facility

Fig. 164b

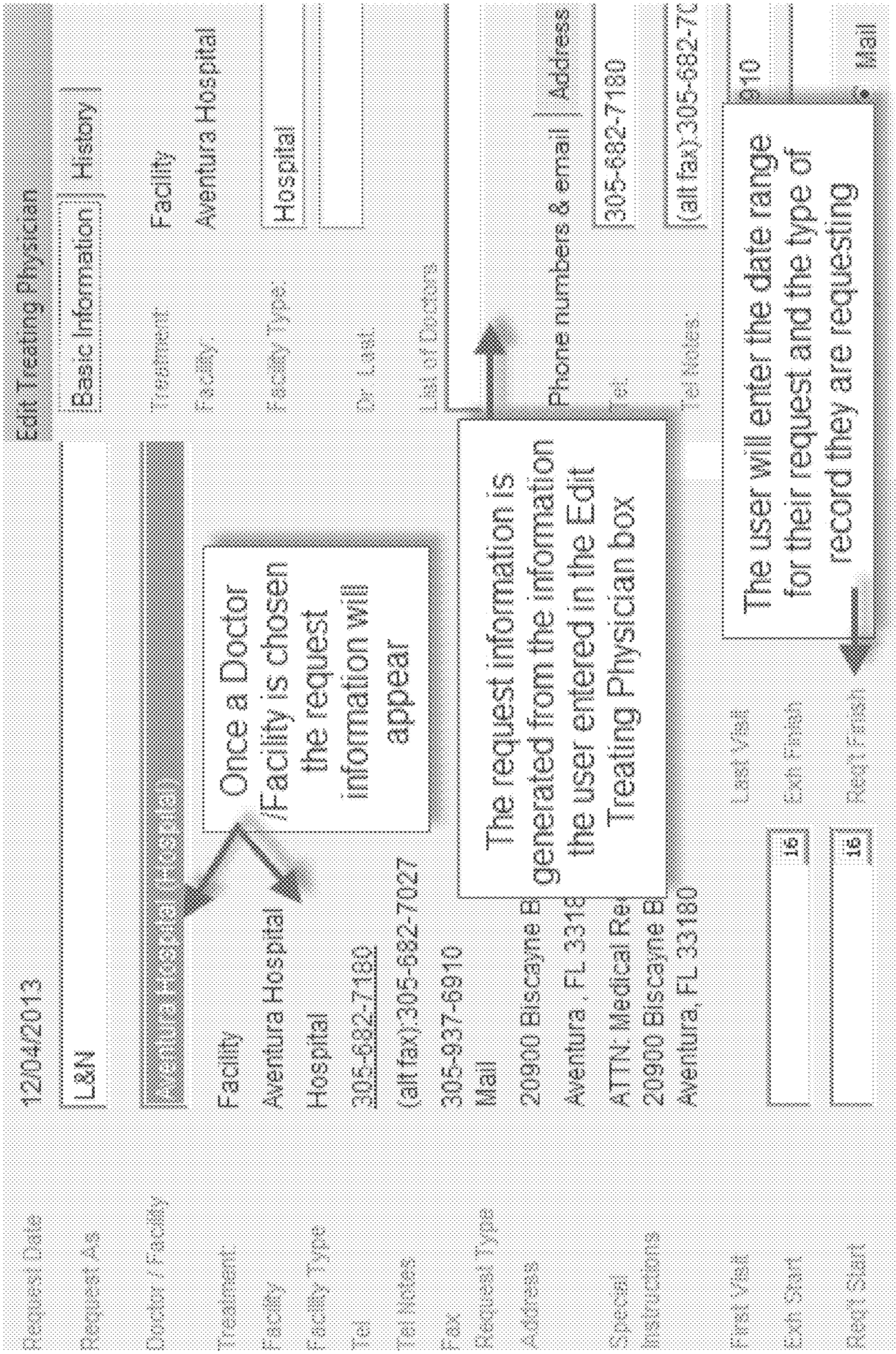

Request Date
Request As
Doctor / Facility
Treatment
Facility
Facility Type
Tel
Tel Notes
Fax
Request Type
Address
Special Instructions
First Visit
Exh Start
Rec'd Start
12/04/2013
L&N
Facility
Aventura Hospital
Hospital
305-682-7180
(alt fax) 305-682-7027
305-937-6910
Mail
Aventura, FL 33180
Last Visit
Exh Finish
Rec'd Finish
Once a Doctor /Facility is chosen the request information will appear
The request information is generated from the information the user entered in the Edit Treating Physician box
The user will enter the date range for their request and the type of record they are requesting
Edit Treating Physician
Basic Information
History
Treatment
Facility
Facility Type
Dr. Last
List of Doctors
Facility
Aventura Hospital
Hospital
Phone numbers & email
Address
305-682-7180
Mail

Fig. 165

08/31/1974 12:00:00 AM

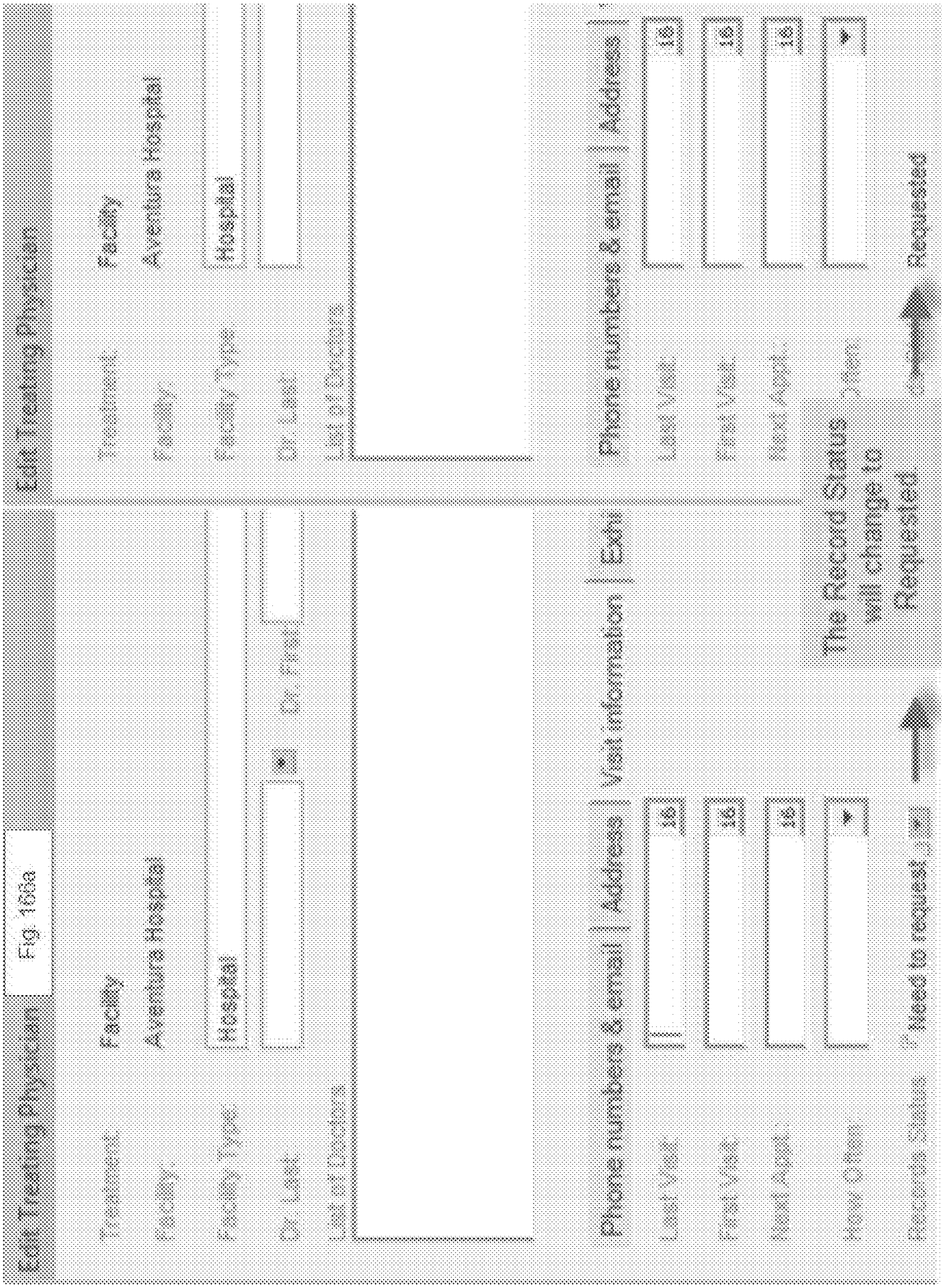
Medical Record (Requested) - Requested

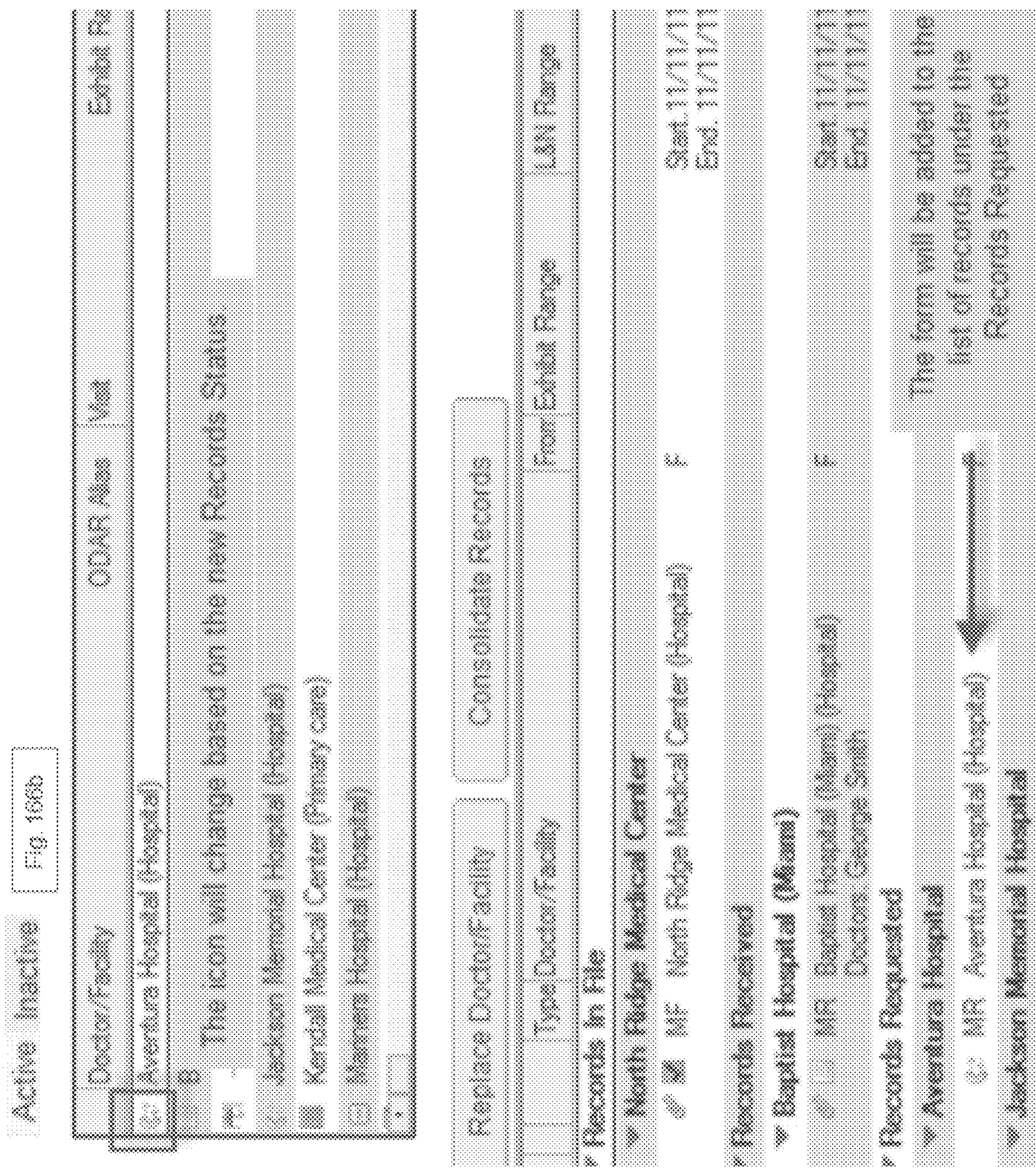
6015-Blue

Once the user presses Save, the request form will be created

Basic information

Created by			
Request Date	10/07/2013		
Request As	L&N		
Treatment:	Facility		
Facility	Tampa Family Health Center (Fowler Ave.)		
Facility Type	clinic		
List of doctors	Dr. Camille Anise		
Tel	813-866-0950		
Fax	813-865-0158		
Request Type	Fax		
Address	1502 E Fowler Ave. Tampa , FL 33612		
First Visit	03/01/2012	Last Visit	10/05/2012
Exh Start		Exh Finish	
Req't Start	02/05/2013	Req't Finish	01/07/2014
Record Type:	MR	Sent By:	Facility


Edit Treating Physician
Fig. 166a
Facility
Aventura Hospital
Hospital
Phone numbers & email | Address | Visit information | Extr
Need to request
The Record Status will change to Requested
Edit Treating Physician
Facility
Aventura Hospital
Hospital
Phone numbers & email | Address
Requested


Active Inactive
Fig. 166b
Doctor/Facility
ODAR Alias
Visit
Exhibit Ra
Aventura Hospital (Hospital)
The icon will change based on the new Records Status
Jackson Memorial Hospital (Hospital)
Kendall Medical Center (Primary care)
Mariners Hospital (Hospital)
Replace Doctor/Facility
Consolidate Records
Type Doctor/Facility
Flor Exhibit Range
LSN Range
Records In File
North Ridge Medical Center
MF North Ridge Medical Center (Hospital)
Records Received
Baptist Hospital (Miami)
MR Baptist Hospital (Miami) (Hospital)
Records Requested
Aventura Hospital
MR Aventura Hospital (Hospital)
Jackson Memorial Hospital
The form will be added to the list of records under the Records Requested

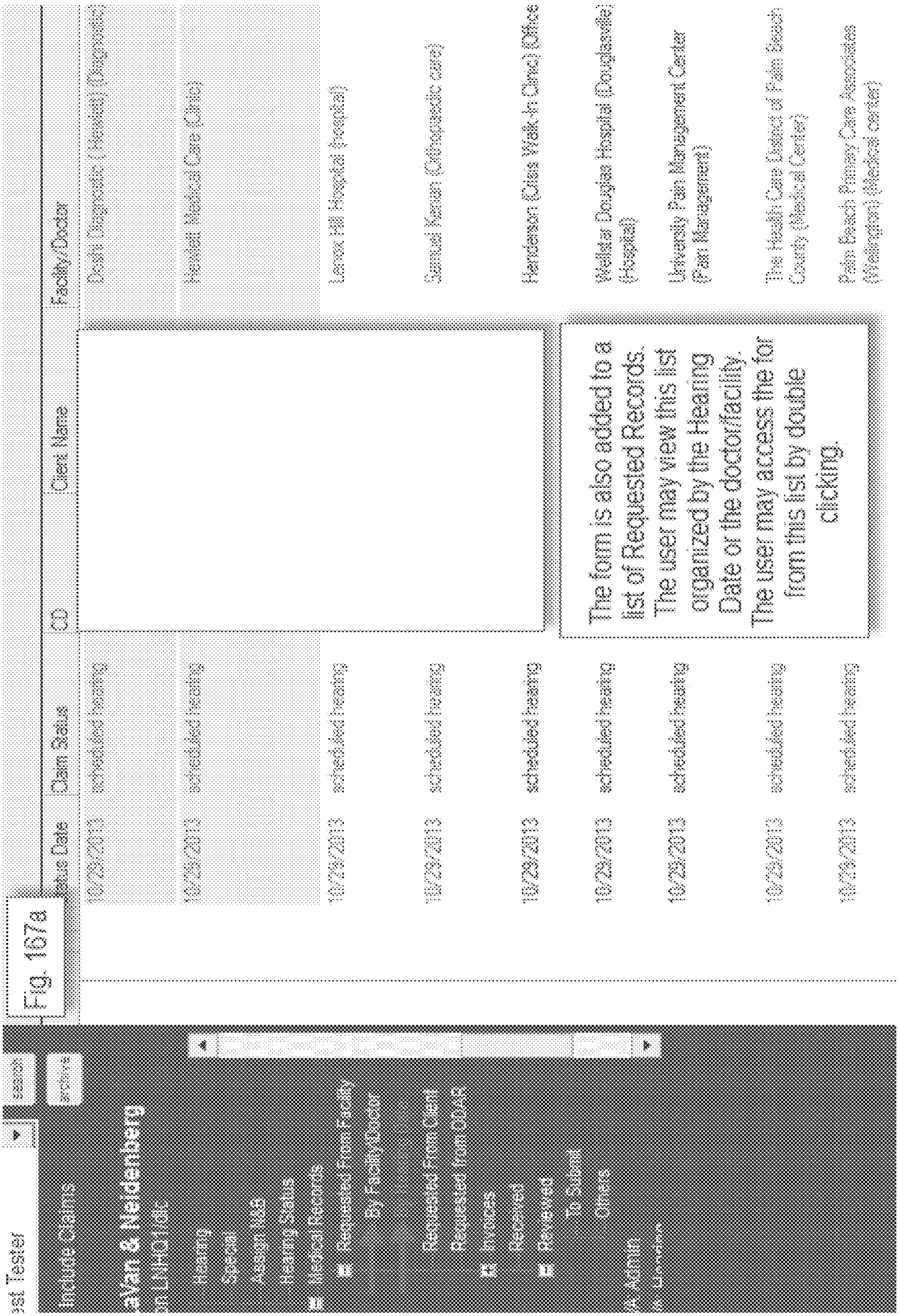
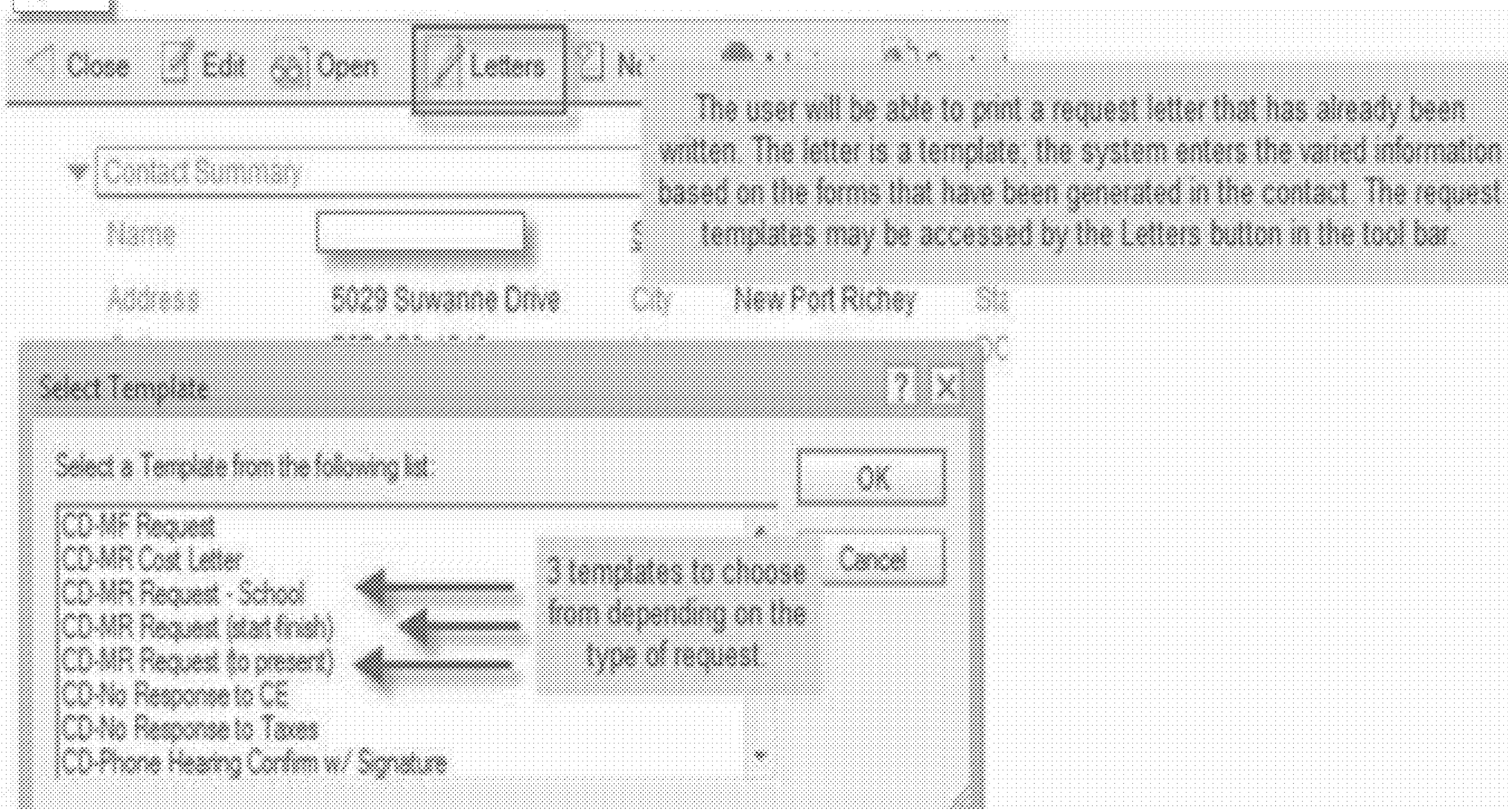

Include Claims
search
archive
aVan & Neidenberg
Hearing
Special
Hearing Status
Medical Records
Requested From Facility
By Facility/Doctor
Requested From Client
Requested from ODAR
Invoices
Received
Reviewed
To Submit
Others
A Admin
Status Date
Claim Status
CD
Client Name
Facility/Doctor
10/29/2013
scheduled hearing
Hewlett Medical Care (Clinic)
Lenox Hill Hospital (hospital)
Samuel Kernan (Orthopaedic care)
Henderson (Oasis Walk-In Clinic) (Office
Wellstar Douglas Hospital (Douglasville) (Hospital)
University Pain Management Center (Pain Management)
The Health Care District of Palm Beach County (Medical Center)
Palm Beach Primary Care Associates (Wellington) (Medical center)
The form is also added to a list of Requested Records. The user may view this list organized by the Hearing Date or the doctor/facility. The user may access the for from this list by double clicking.

Fig. 167a

Fig. 167b


Close
Edit
Open
Letters
The user will be able to print a request letter that has already been written. The letter is a template, the system enters the varied information based on the forms that have been generated in the contact. The request templates may be accessed by the Letters button in the tool bar
Contact Summary
Name
Address
5029 Suwanne Drive
City
New Port Richey
Select Template
Select a Template from the following list
OK
Cancel
CD-MF Request
CD-MR Cost Letter
CD-MR Request - School
CD-MR Request (start finish)
CD-MR Request (to present)
CD-No Response to CE
CD-No Response to Taxes
CD-Phone Hearing Confirm w/ Signature
3 templates to choose from depending on the type of request

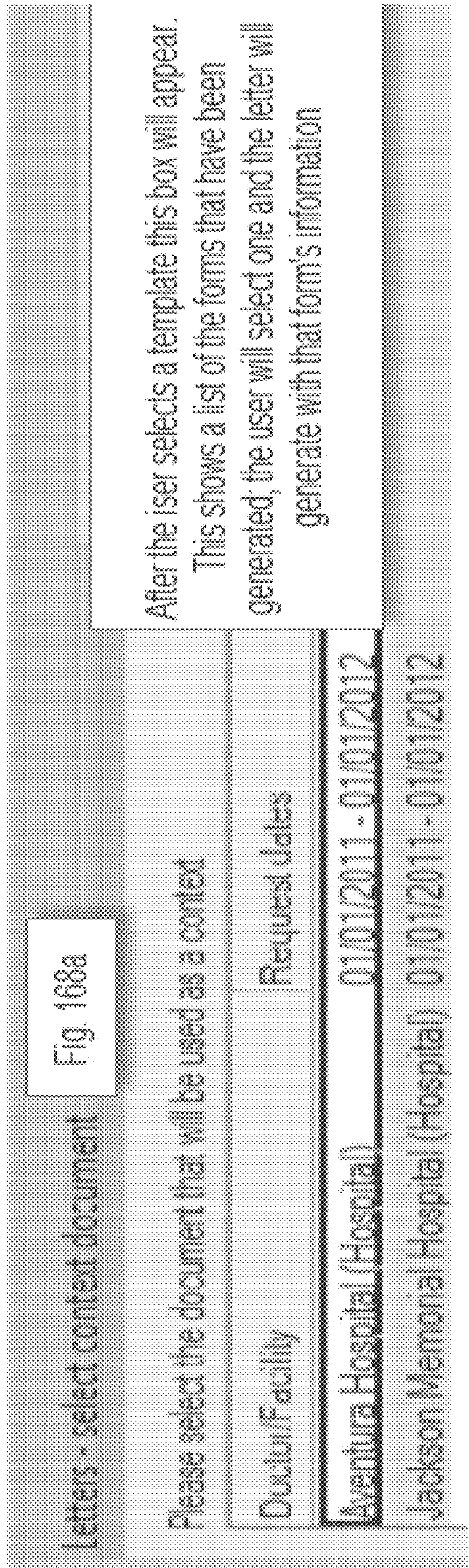
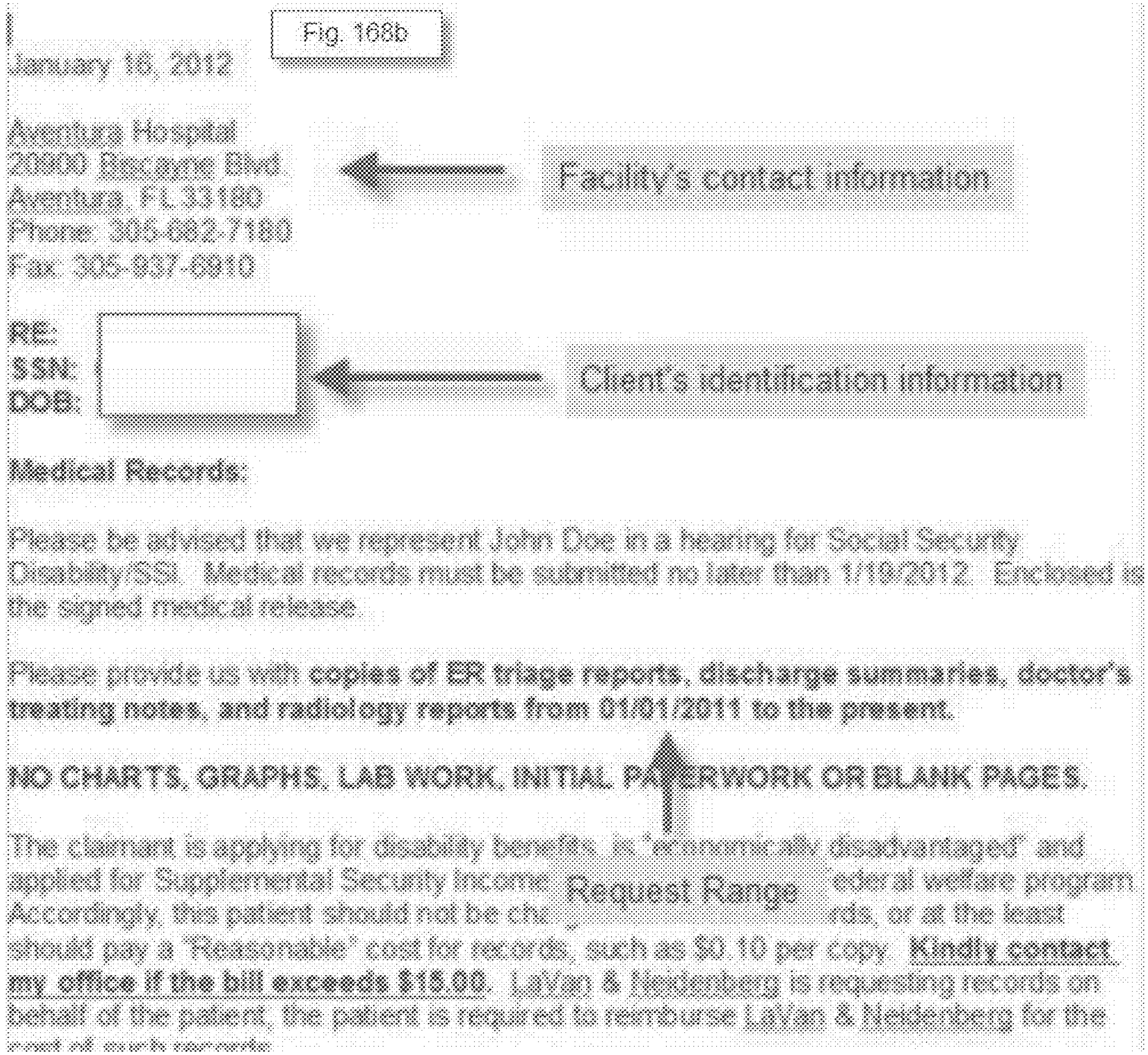

letters - select context document
Please select the document that will be used as a context
Doctor/Facility
Request Dates
Aventura Hospital (Hospital)
01/01/2011 - 01/01/2012
Jackson Memorial Hospital (Hospital)
01/01/2011 - 01/01/2012
After the iser selects a template this box will appear.
This shows a list of the forms that have been
generated; the user will select one and the letter will
generate with that form's information

Fig. 168a

Fig. 168b


January 16, 2012

Aventura Hospital
20900 Biscayne Blvd
Aventura, FL 33180
Phone: 305-682-7180
Fax: 305-937-6910

RE:
SSN:
DOB:

Medical Records:

Please be advised that we represent John Doe in a hearing for Social Security Disability/SSI. Medical records must be submitted no later than 1/19/2012. Enclosed is the signed medical release.

Please provide us with **copies of ER triage reports, discharge summaries, doctor's treating notes, and radiology reports from 01/01/2011 to the present.**

NO CHARTS, GRAPHS, LAB WORK, INITIAL PAPERWORK OR BLANK PAGES.

The claimant is applying for disability benefits, is "economically disadvantaged" and applied for Supplemental Security Income ... federal welfare program. Accordingly, this patient should not be ch... ...rds, or at the least should pay a "Reasonable" cost for records, such as $0.10 per copy. **Kindly contact my office if the bill exceeds $15.00.** LaVan & Neidenberg is requesting records on behalf of the patient, the patient is required to reimburse LaVan & Neidenberg for the cost of such records.

Fig. 169

Summary Tab

The Summary Tab organizes a client's claim information, including application dates, yearly earnings, work history, conditions, and prescriptions. The Summary tab is a quick reference to important claim information.

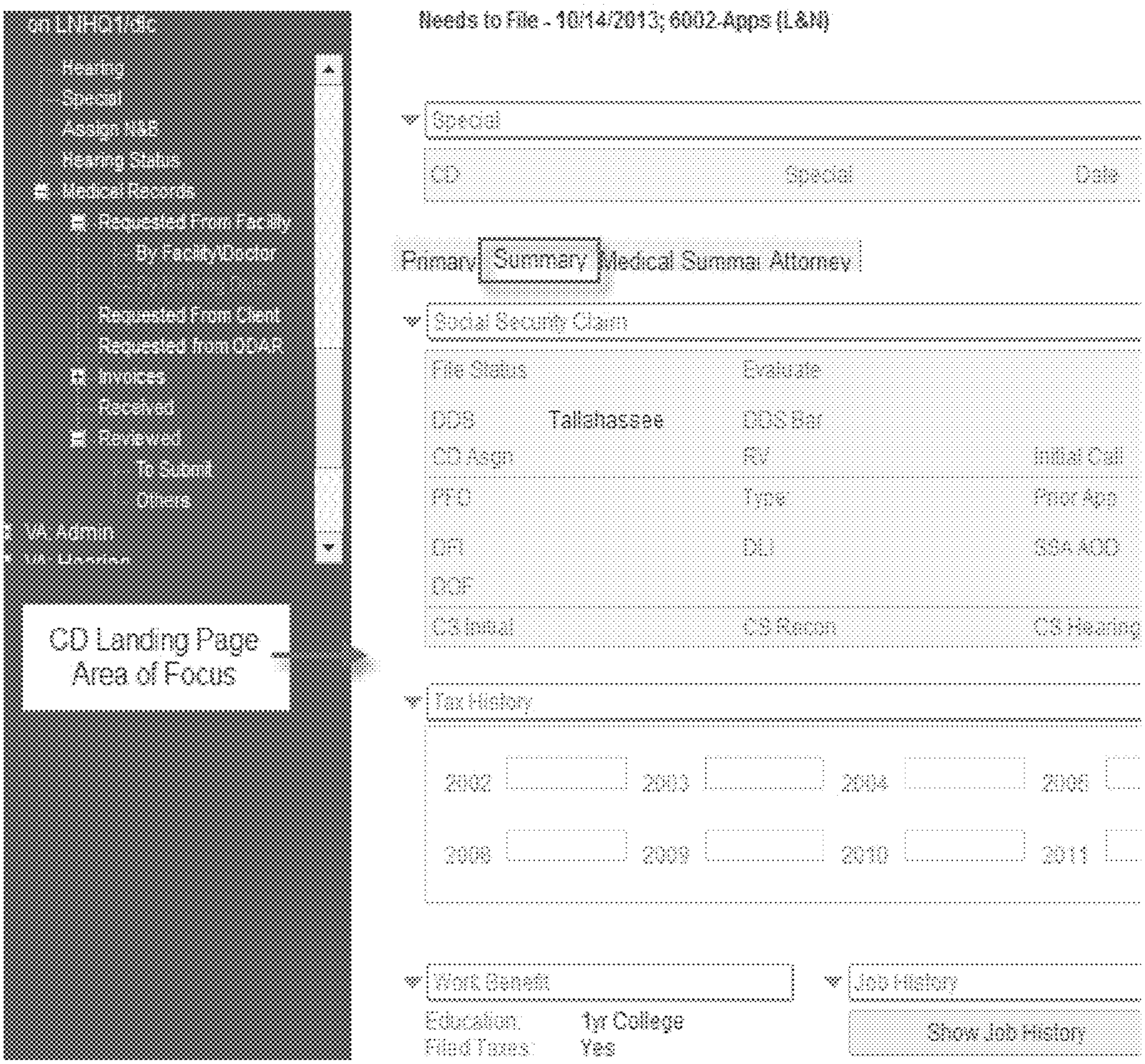


Fig. 170a

The following print screens will explain each of the fields that are shown in the yellow box.

File Status: Built is formula selects File Status when a hearing is scheduled. Workflow starts based on File Status

Fig. 170b

e-File: The user fills in this field to indicate whether the Exhibit File is electronic or paper.

Fig. 170c

Rec'd File: The user sets this field to indicate the date that the Exhibit File was received.

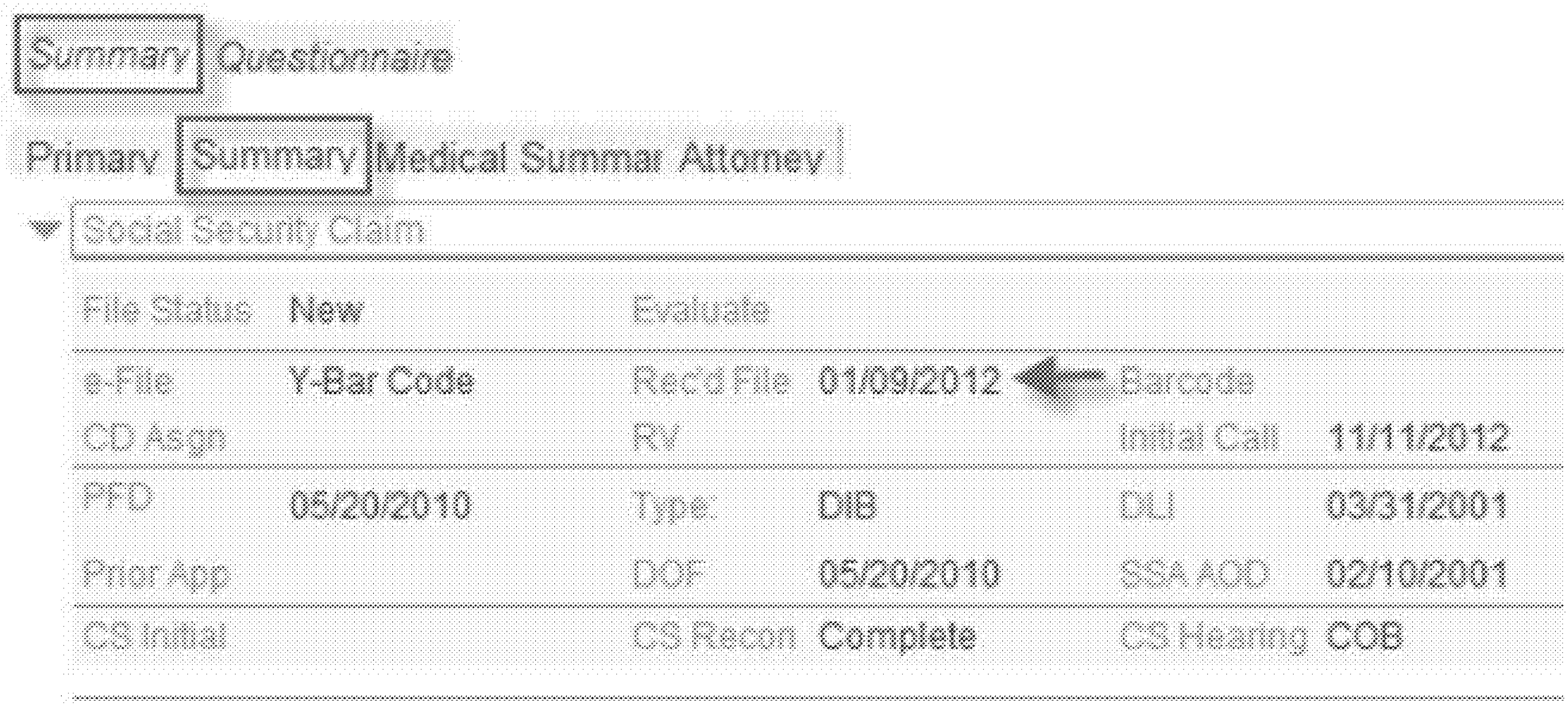


Fig. 171a

Initial Call: The user completes this field to indicate the date that the Initial Call was completed.

Fig. 171b

Copy Reqt: The user completes this field to indicate the date that the Exhibit File was requested.

Fig. 171c

Copy Note: The user completes this field to provide special instructions or notes needed to request the Exhibit File.

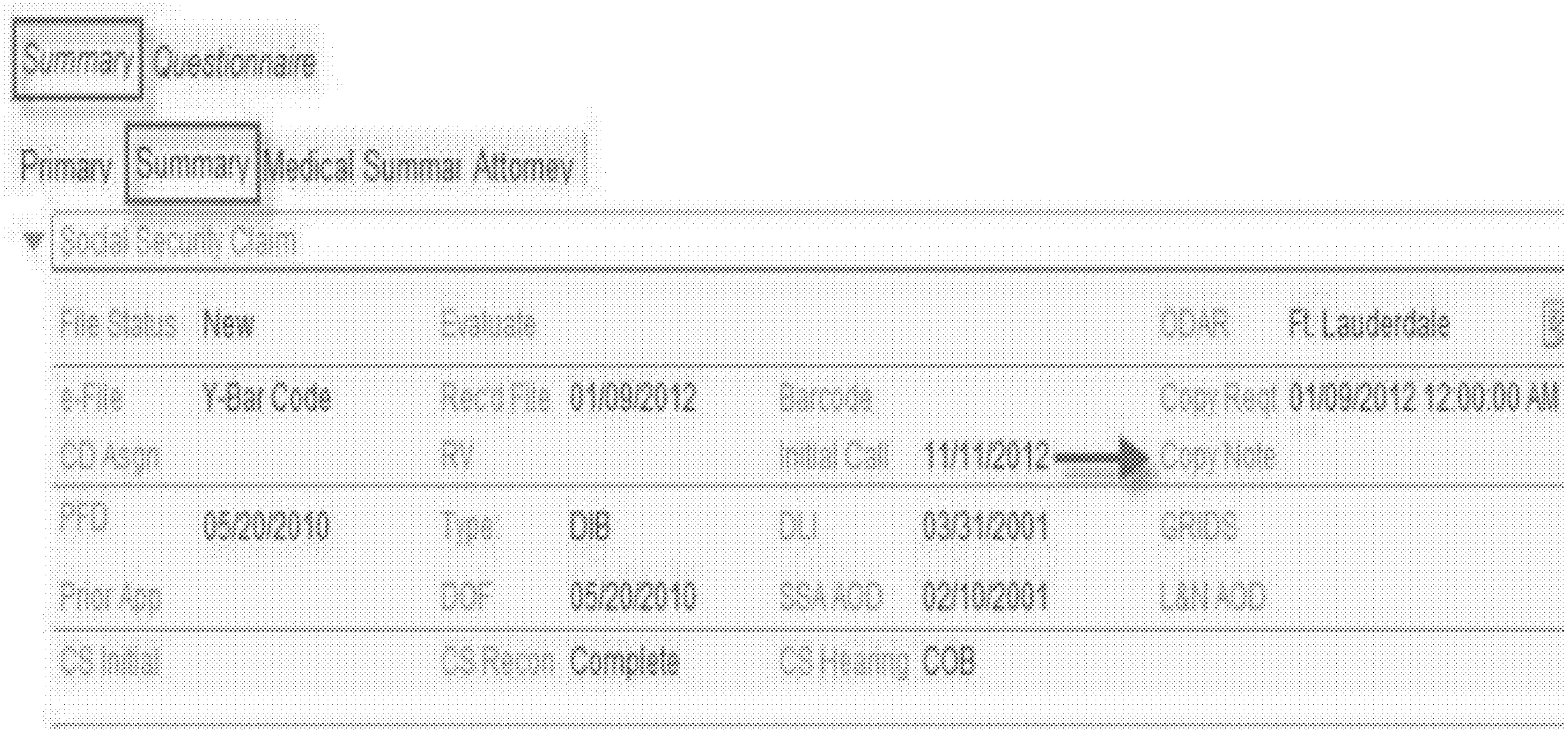


Fig. 172a

The following fields are technical aspects of the client's SSA claim.

PFD: This field indicates the Protective Filing Date of the client's application for Social Security Disability

Type: This field indicates the type of disability application that is currently pending

DLI: This field indicates the date in which the client's work credits, acquired by working and paying into Social Security, expire

DOF: This field indicates the date that the current application for disability was filed

Prior App: This field indicates the DOF of a previously filed application that is no longer pending

SSA AOD: The Alleged Onset Date, the date the client says they became disabled, according to Social Security

L&N AOD: This field indicates the AOD that the CDs select to determine the request range for medical records

Fig. 172b

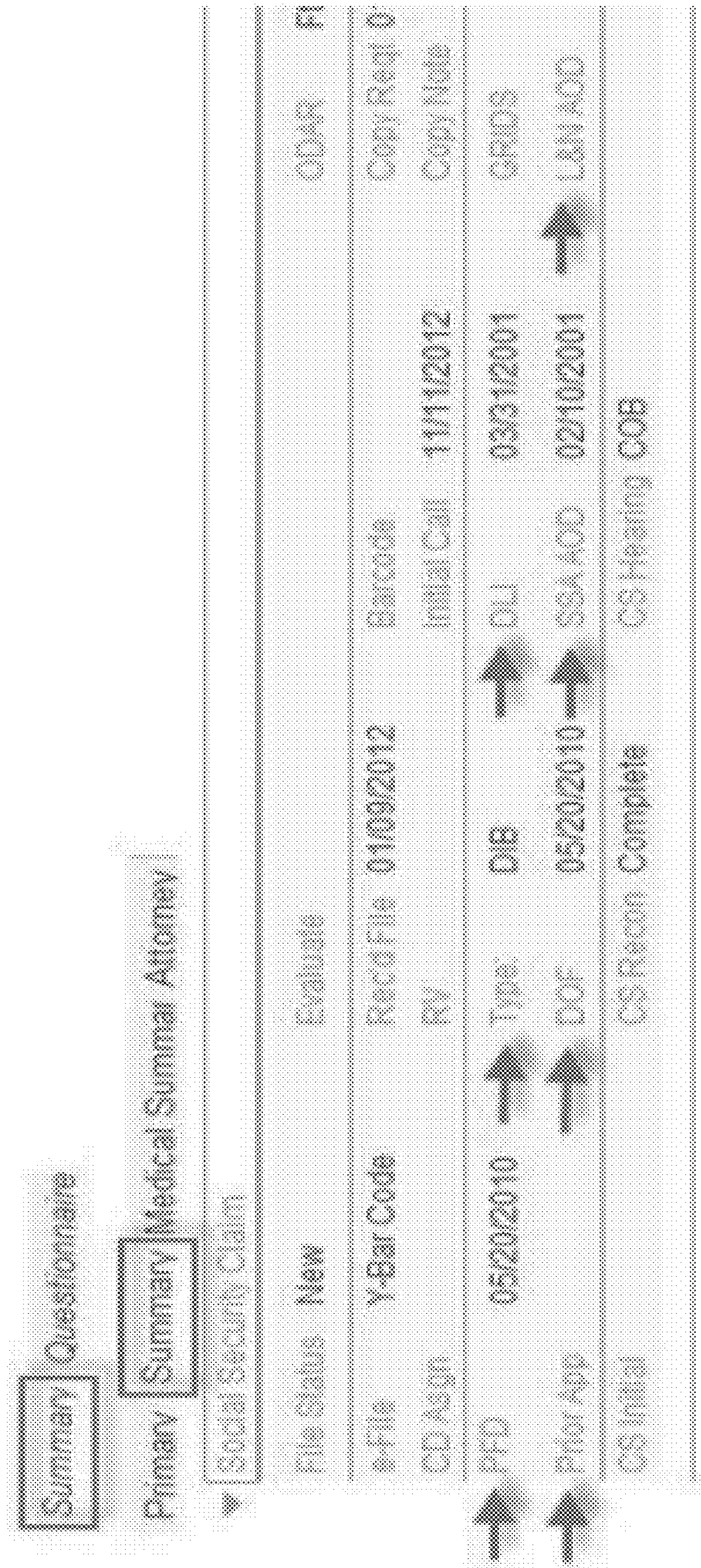

Summary
Questionnaire
Primary
Summary
Medical Summary
Attorney
Social Security Claim
File Status
New
Evaluate
ODAR
e-File
Y-Bar Code
Rec'd File
01/09/2012
Barcode
CD Agn
RV
Initial Call
11/11/2012
Copy Note
PFD
05/20/2010
Type
DB
DLI
03/31/2001
Prior App
DOF
05/20/2010
SSA AOD
02/10/2001
LM AOD
CS Initial
CS Recon
Complete
CS Hearing
COB

Fig. 172c

The user may edit this section by clicking on the paper/pencil icon in the top right corner

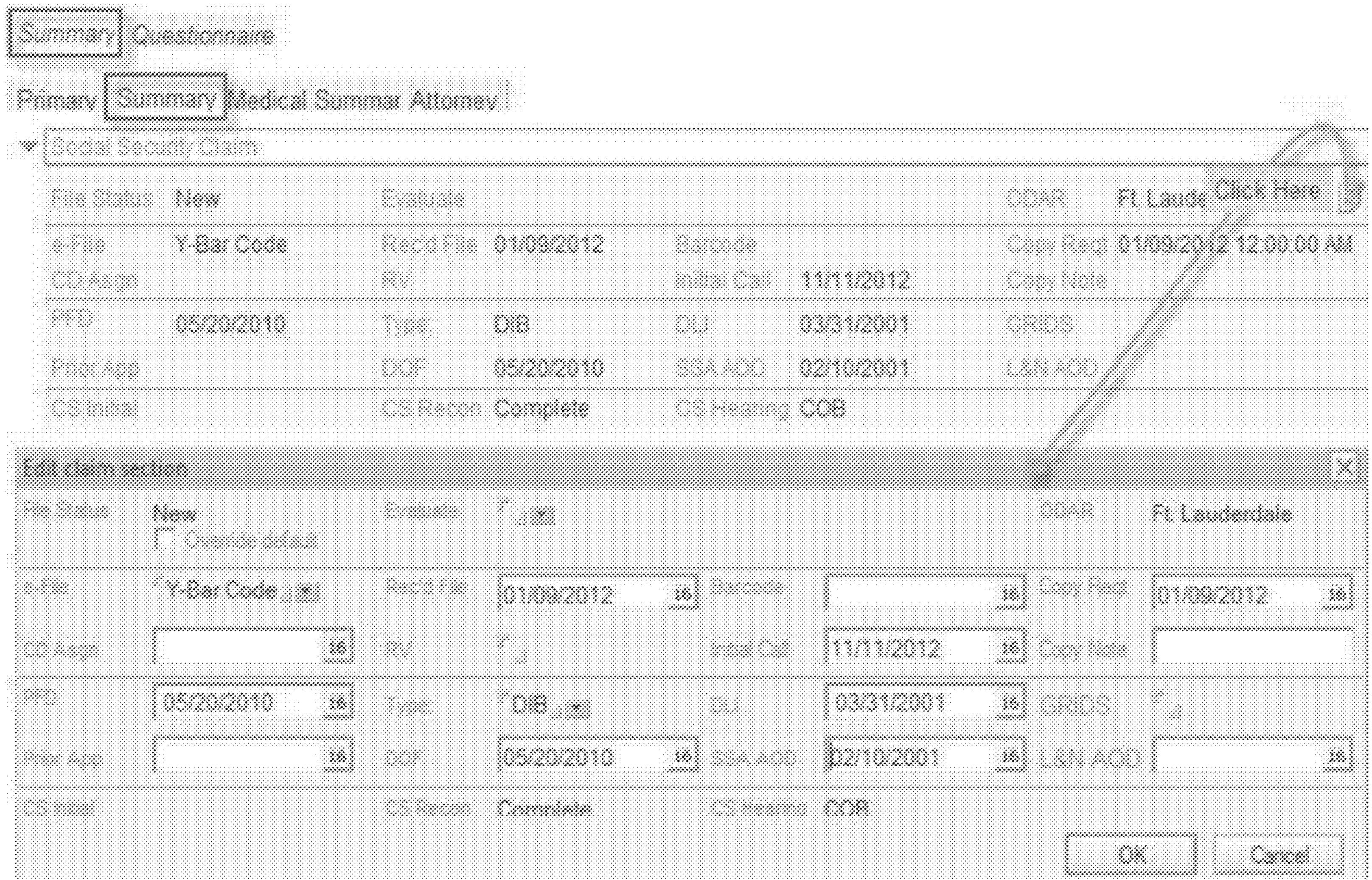


Fig. 173a

This print screen shows the earnings box. The client's earnings record is included in the Exhibit File and is important for determining SSA Disability eligibility. The user enters the information by clicking on this icon.

Fig. 173b

The Job History summary show the clients work history.

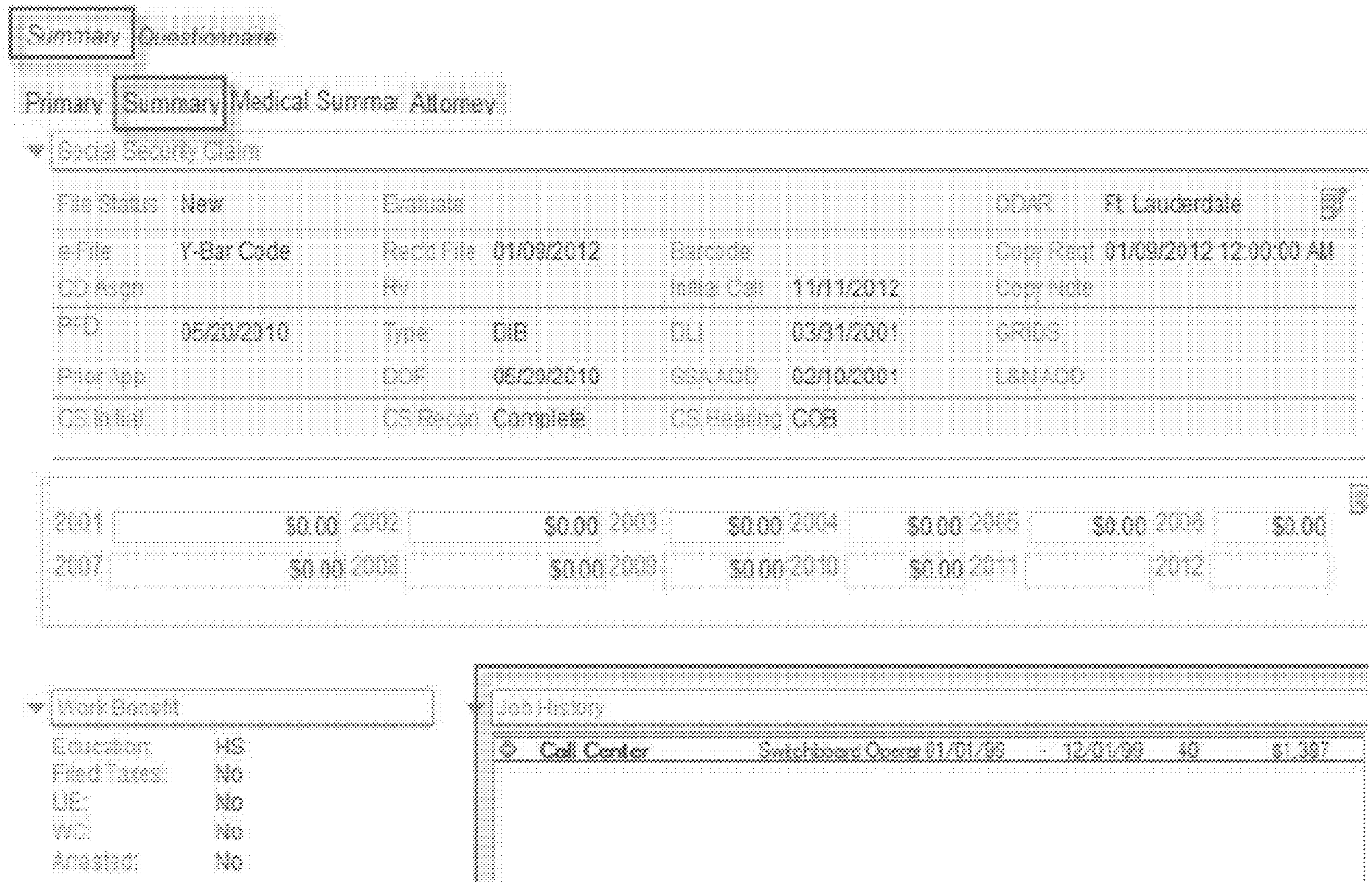
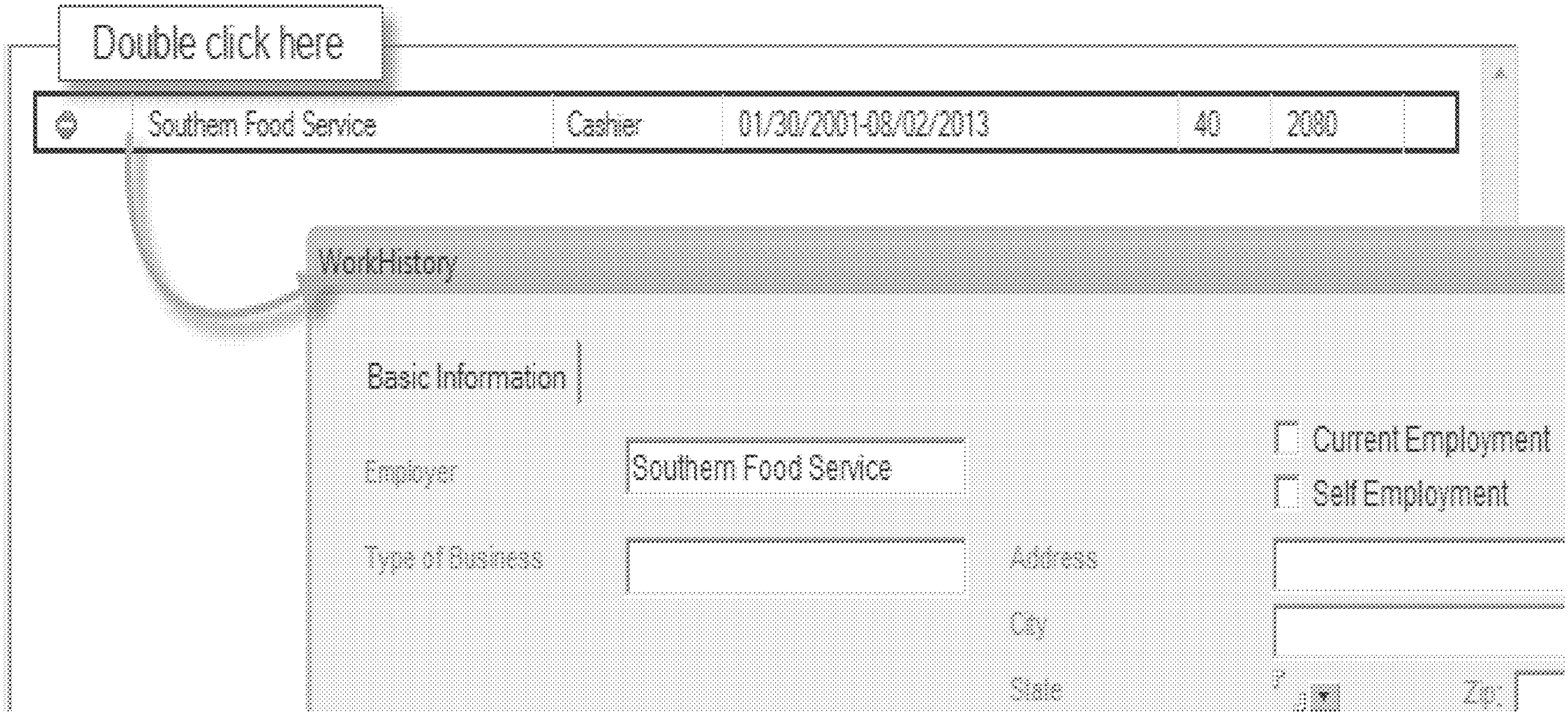


Fig. 174a

The user may edit this information by double clicking on the existing information or by clicking Create.



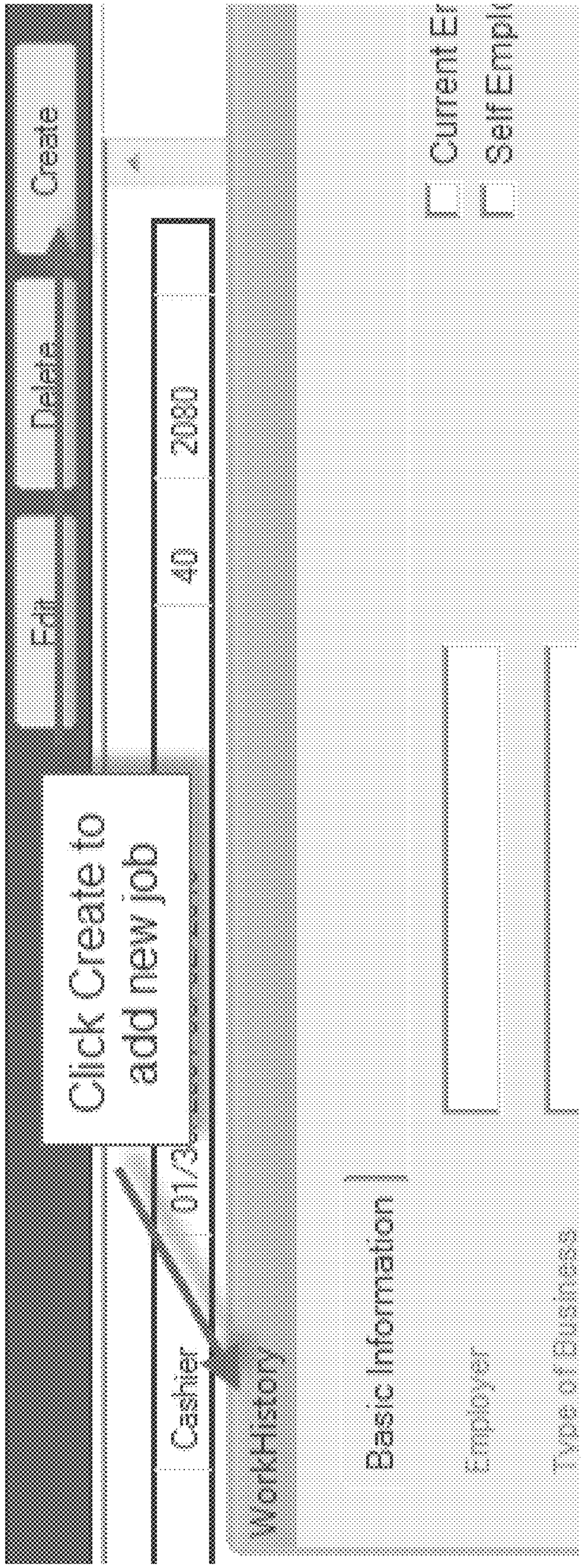

Create
Delete
Edit
40
2080
Click Create to add new job
Cashier
01/3
WorkHistory
Basic Information
Employer
Type of Business

Fig. 174b

Fig. 175

This print screen shows the Work Benefit box. This box shows the client's tax, Worker's Compensation, Unemployment compensation, and tax history, as well as their highest level of education and incarceration history.

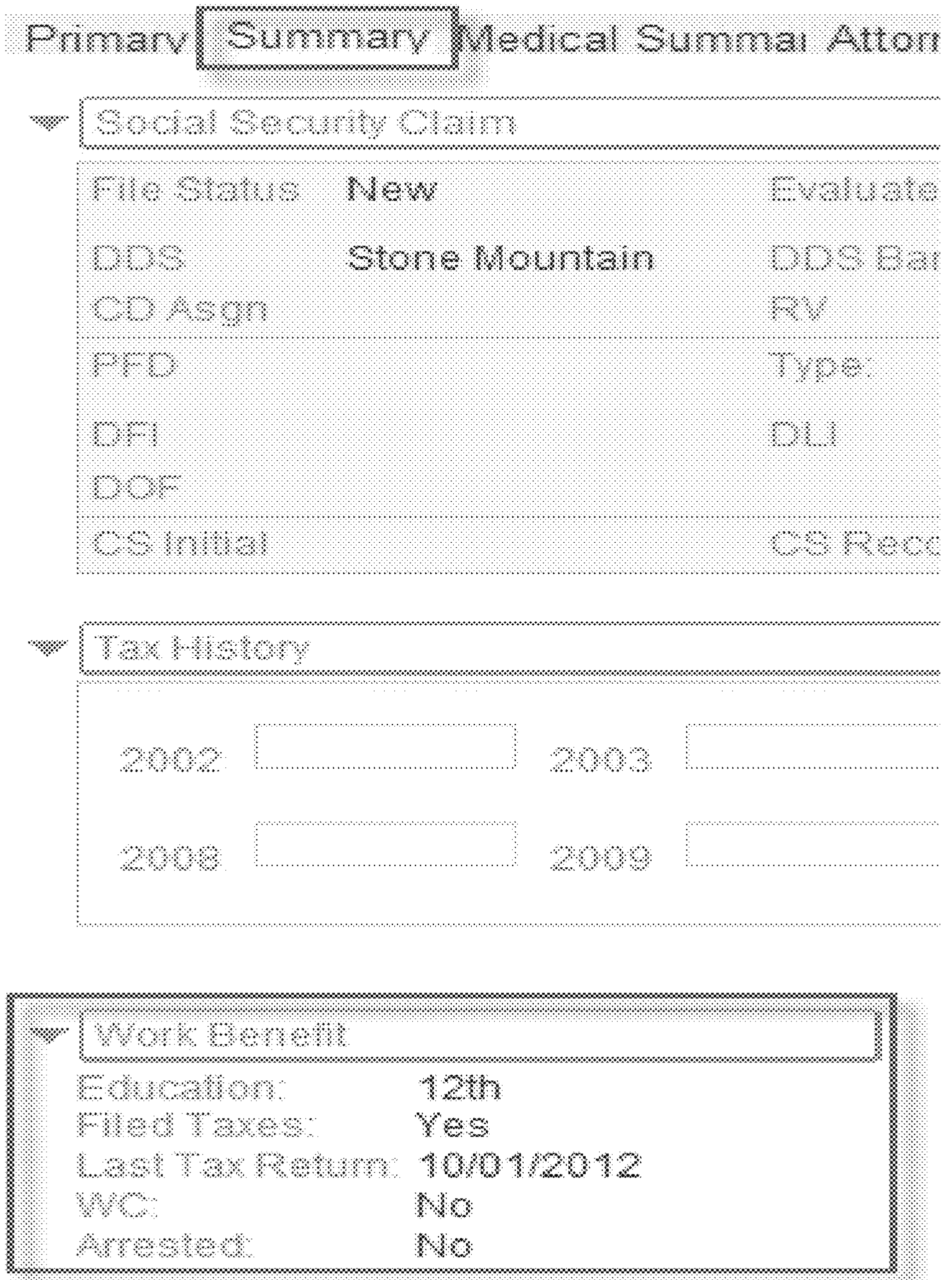


Fig. 176a

The user may edit this information by double clicking on the existing information. Follow up questions will appear depending on certain answers.

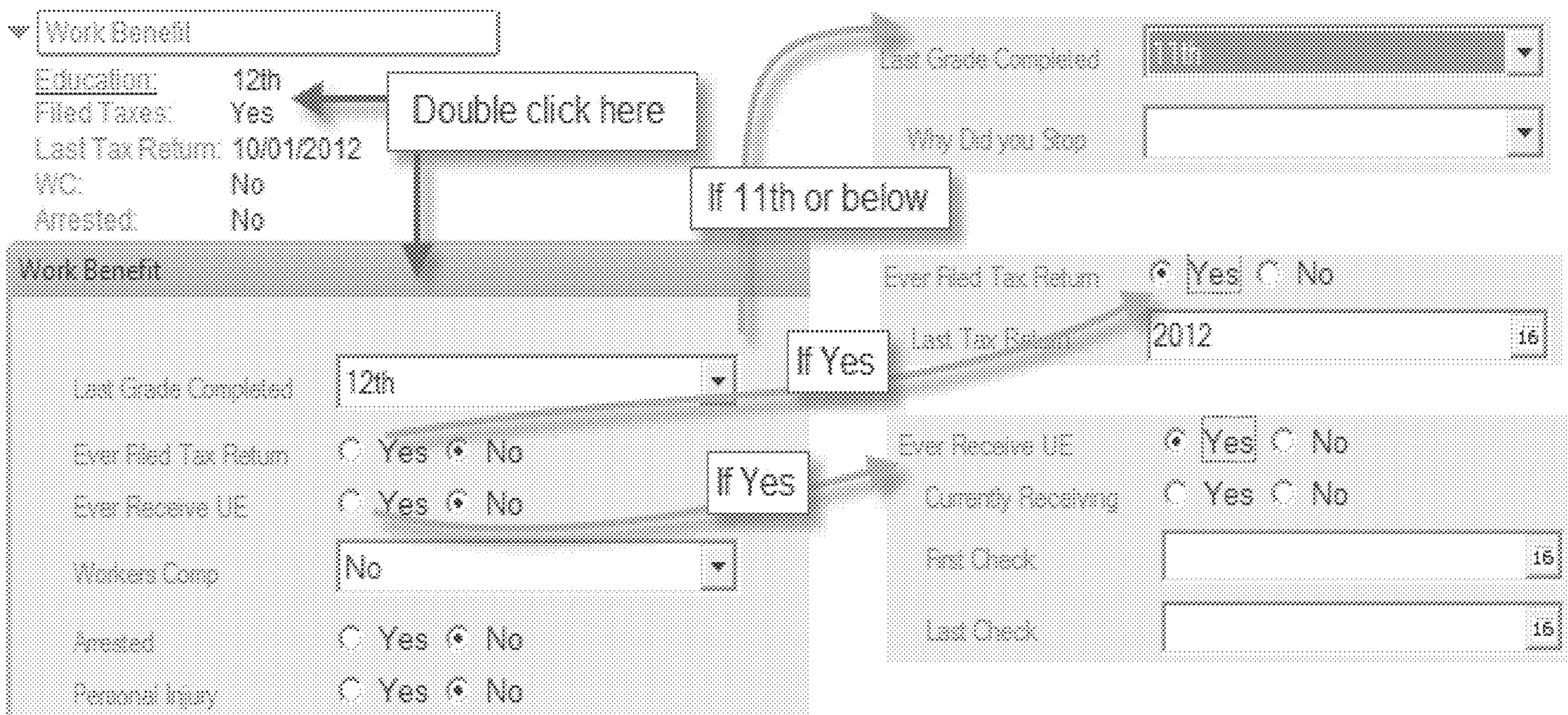


Fig. 176b

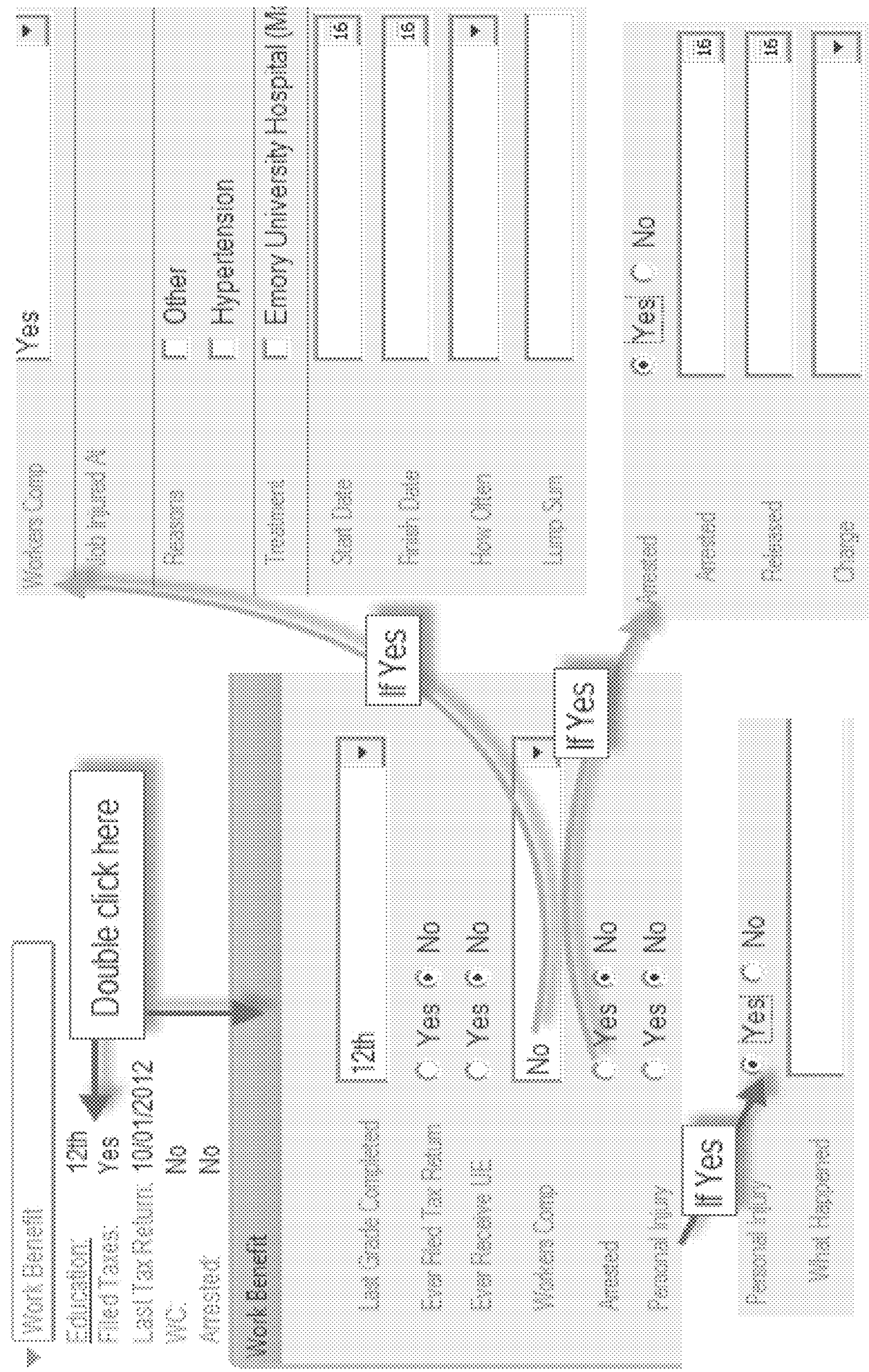

Work Benefit
Education: 12th
Filed Taxes: Yes
Last Tax Return: 10/01/2012
WC: No
Arrested: No
Double click here
Work Benefit
Last Grade Completed 12th
Ever Filed Tax Return Yes No
Ever Receive UE Yes No
Workers Comp No
Arrested Yes No
Personal Injury Yes No
If Yes
If Yes
If Yes
Personal Injury Yes No
What Happened
Workers Comp Yes
Job Injured At
Reasons Other
Hypertension
Treatment Emory University Hospital (M
Start Date
Finish Date
How Often
Lump Sum
Arrested Yes No
Arrested
Released
Charge

Fig. 177a

This print screen shows the SSA Claims box. This box shows the Claim Status and LA assigned.

Fig. 177b

Approved users may edit this information using the Status button in the toll bar on the contact page.

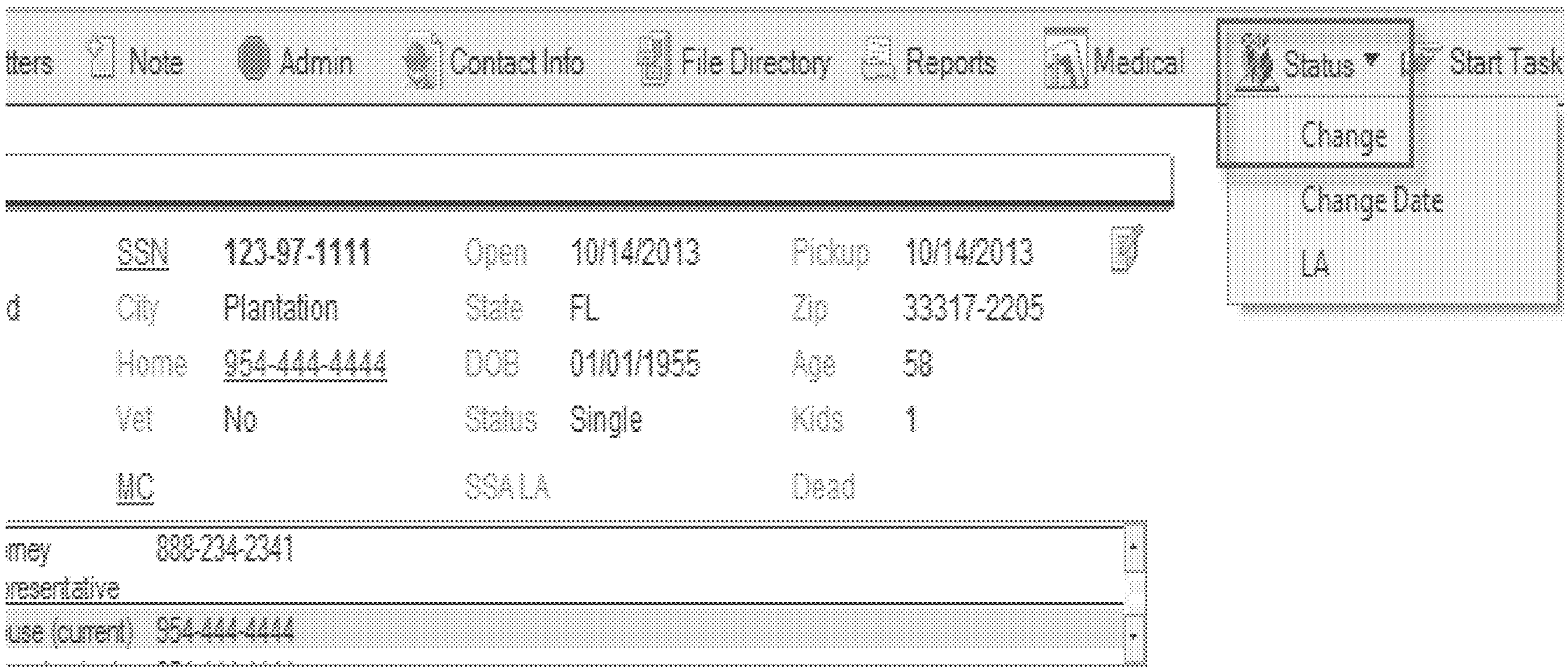


Fig. 178

This print screen shows the SSA Medical Conditions box. This box shows the conditions from which the client is suffering.

▼ Anxiety (N)

Take Rx:	Rx Current	Psychotic:	Never	Violence:	None of these
Hospitalized:	1	Anxiety:	Anxiety & Panic	Depression:	None of these
				Consequence:	None of these

▼ Depression (N)

Take Rx:	Rx Current	Psychotic:	Never	Violence:	None of these
Hospitalized:	1	Anxiety:	Anxiety & Panic	Depression:	None of these
				Consequence:	None of these

Fig. 179

The SSA Medical Conditions box can be edited by using the right click action "Open Medical Condition" or a new Medical Condition can be added by clicking Add Condition in the toll bar on the contact page.

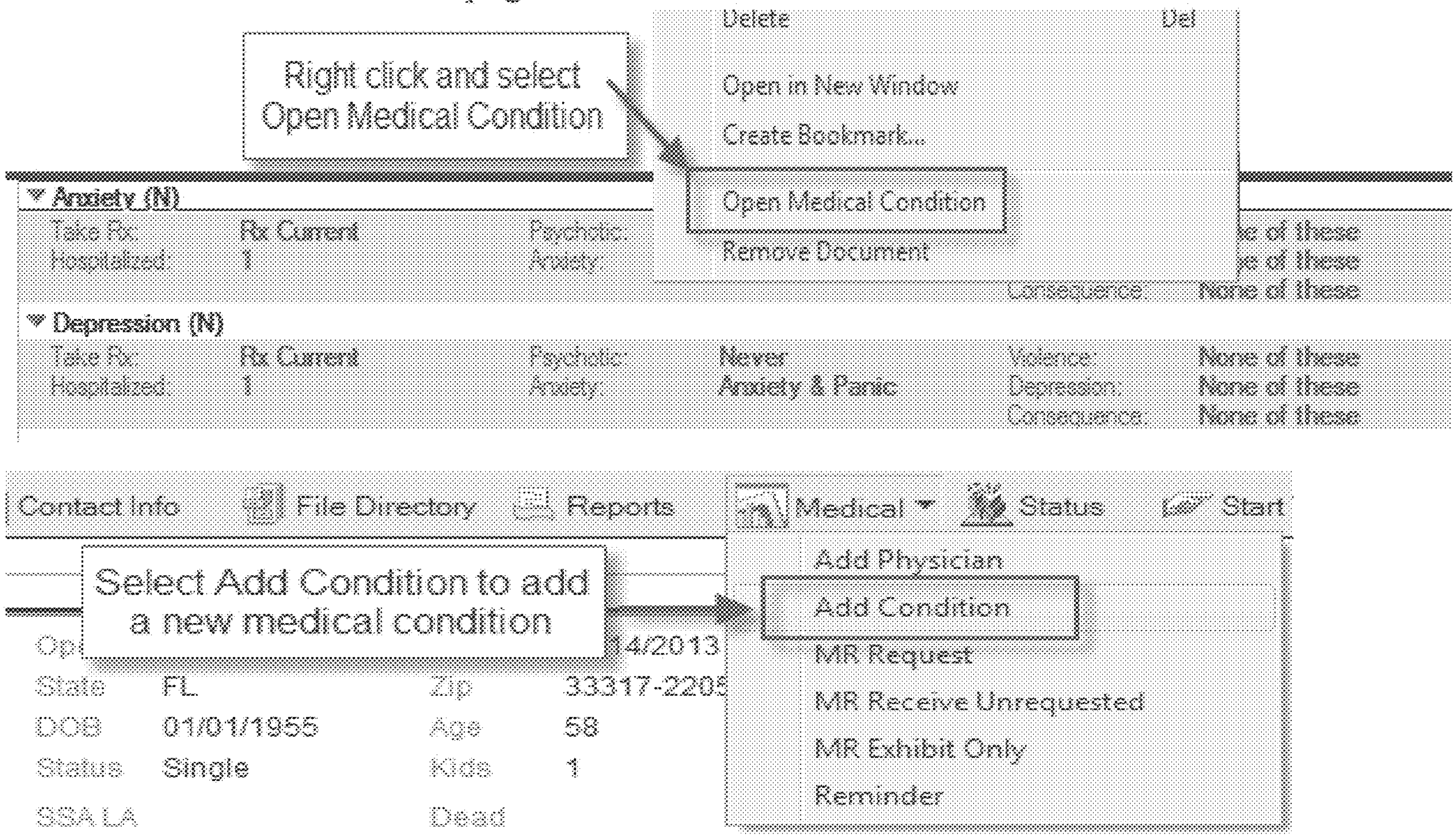


Fig. 180

This print screen shows the Costs box. The Costs box is a quick view of the expenses that were acquired for items used to help the client's case.

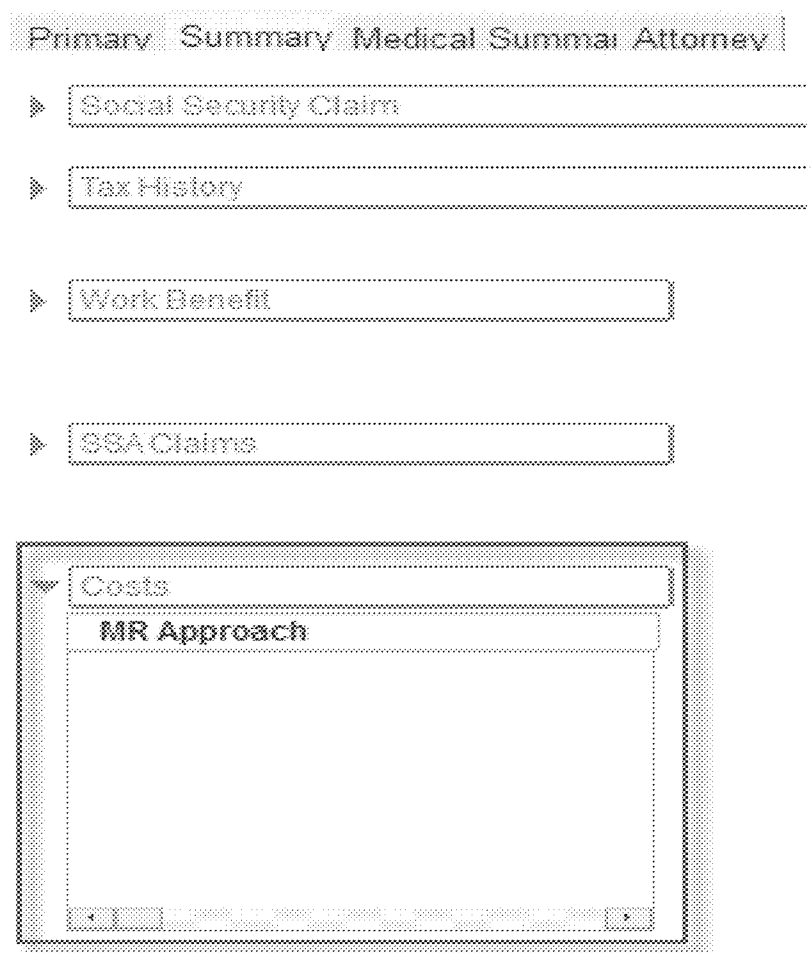


Fig. 181

This print screen shows the Prescriptions box. The Prescriptions box shows the prescribed medications that the client is currently taking.

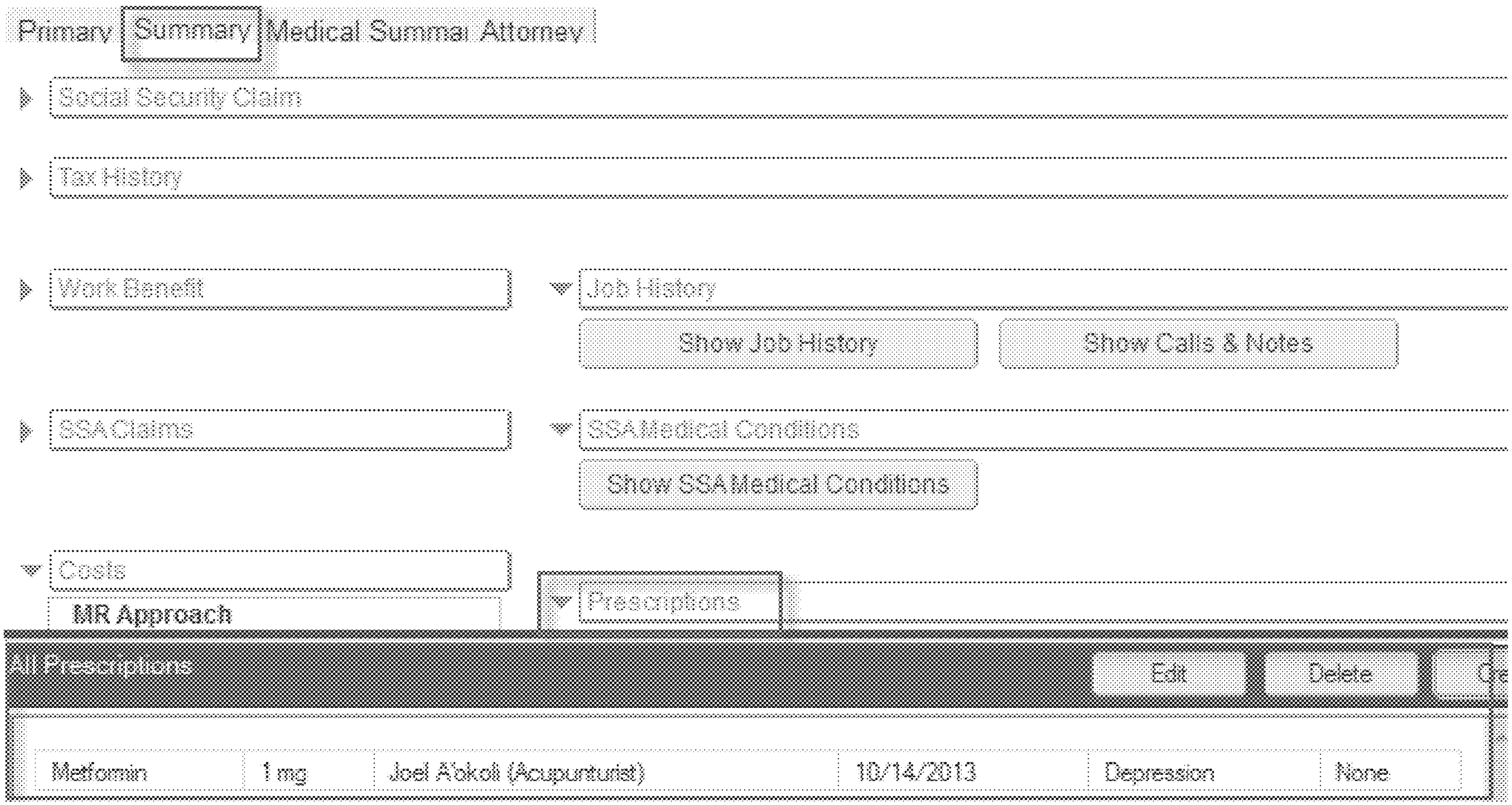


Fig. 182

The Prescriptions box can be edited by double clicking on an existing medication or clicking Create from the Prescription window.

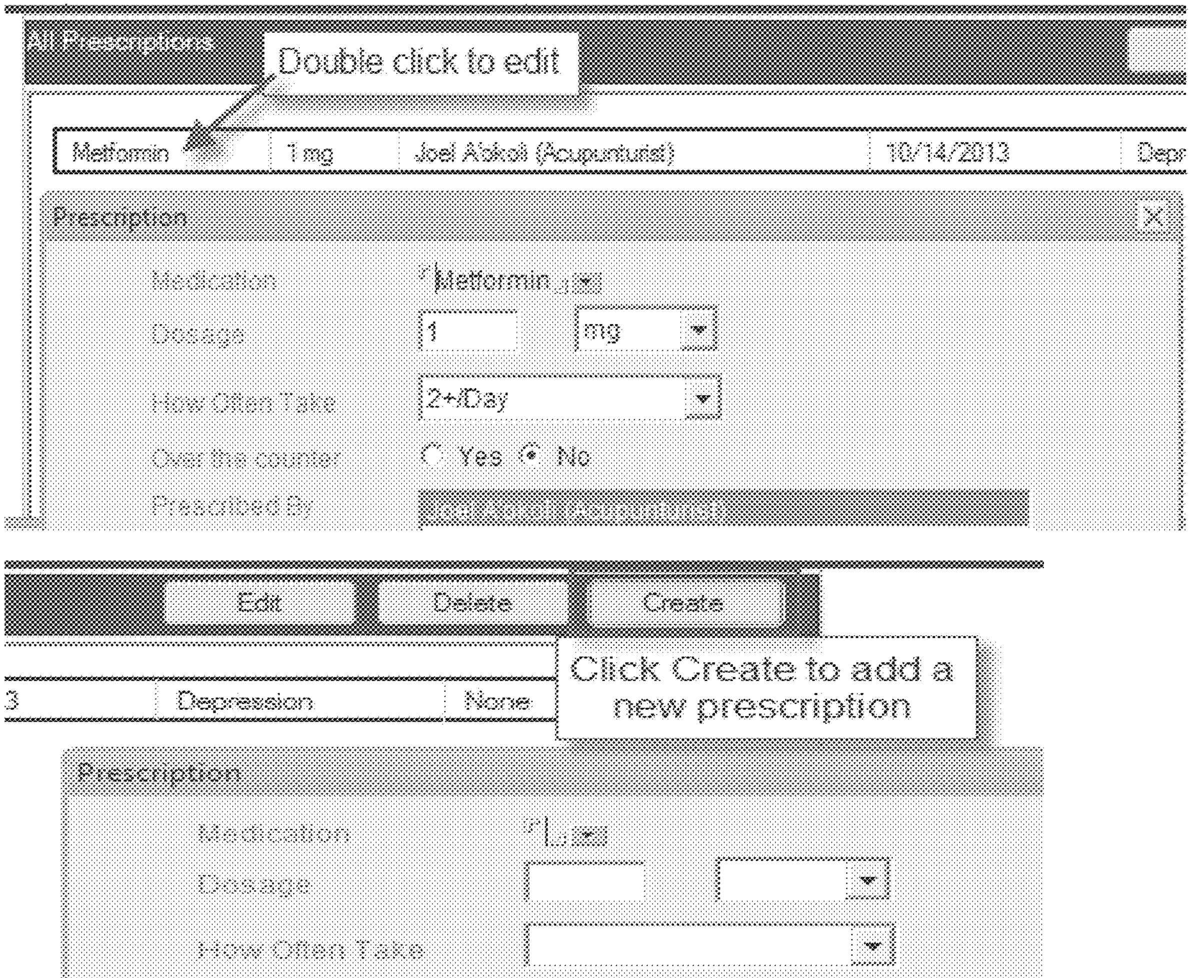


Fig. 183

Attorney Tab

The Attorney Tab organizes the documents that the attorney uses to build the client's case, including medical records (MRs), hearing briefs, and decisions written by Social Security. The print screen is the landing page for Case Developers (CDs).

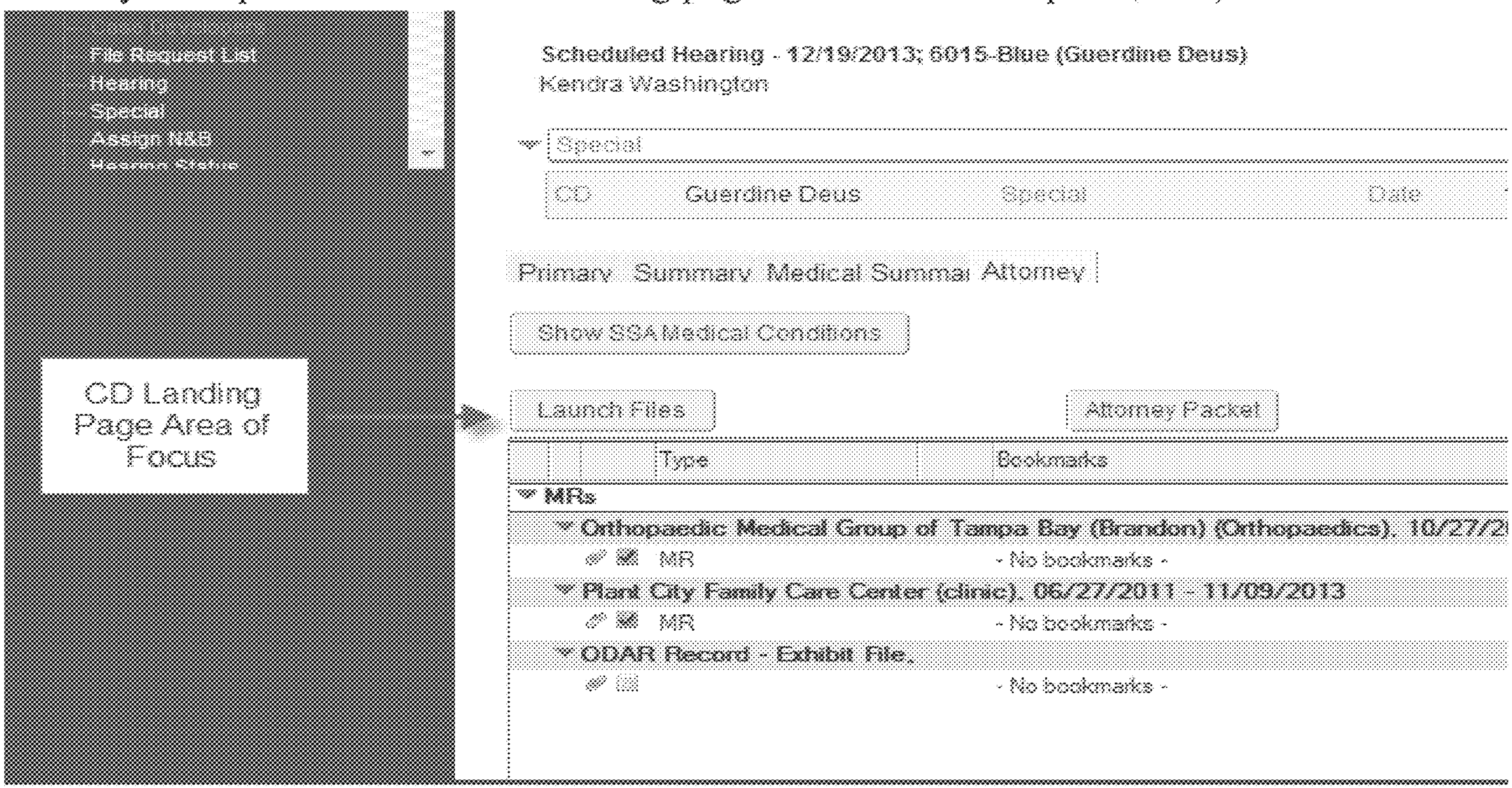


Fig. 184

Attorney tab:

The documents used to build the client's case are organized by subheadings (MRs, Decisions, and L&N Submissions).

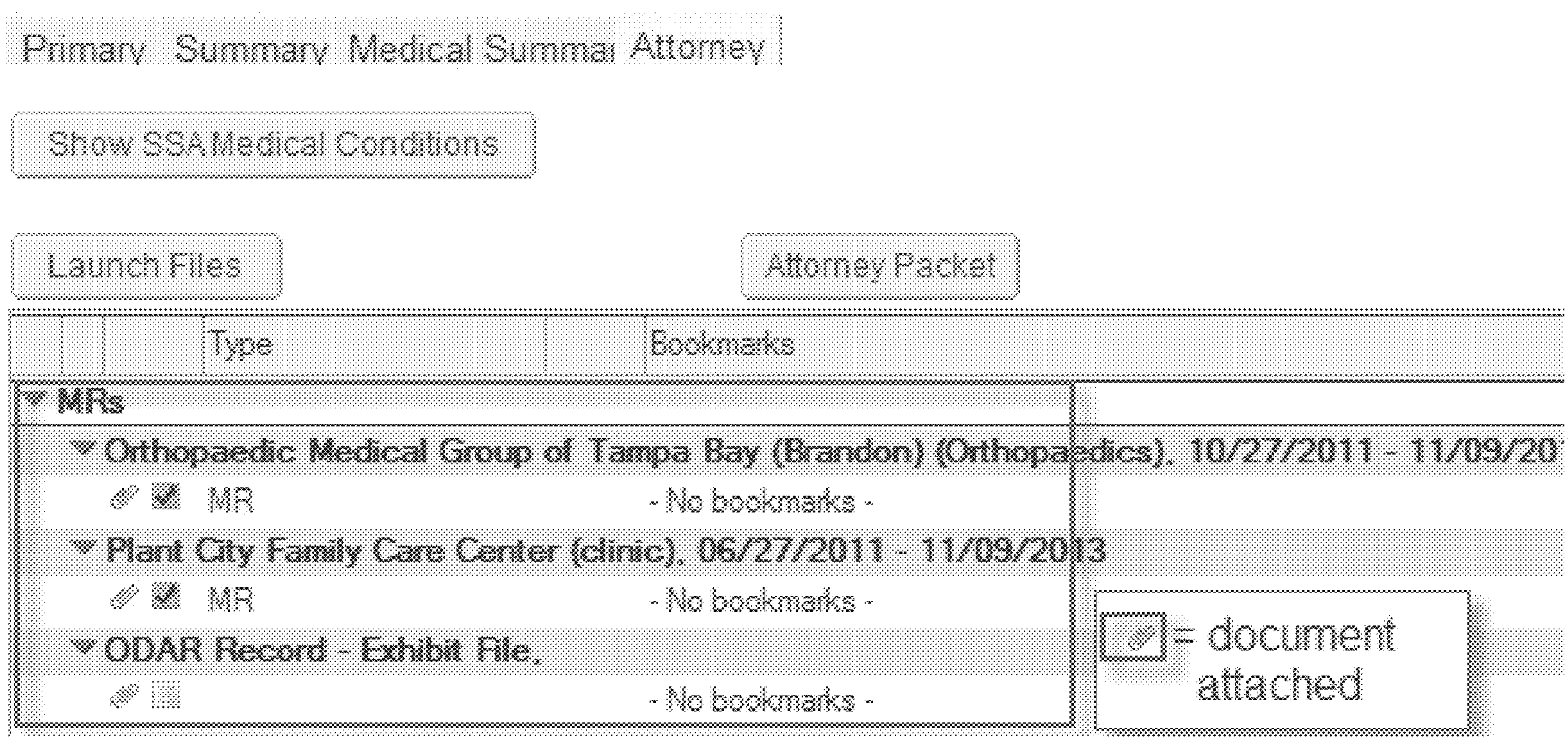


Fig. 185a

A document can be viewed by right clicking on the corresponding paperclip and selecting Preview File.

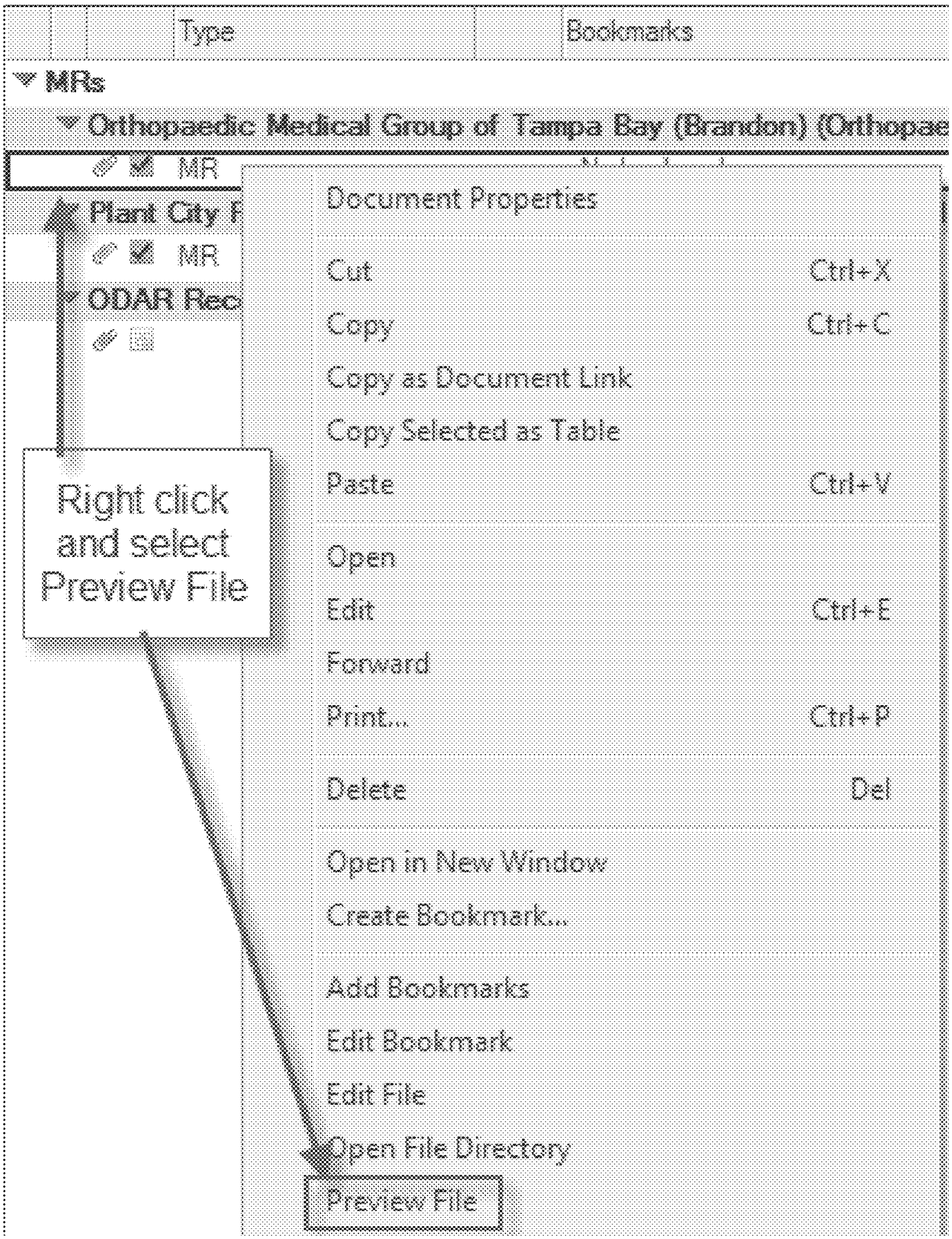


Fig. 185b

Above the documents are buttons; Launch Files, Upload File Changes, and Attorney Packet.

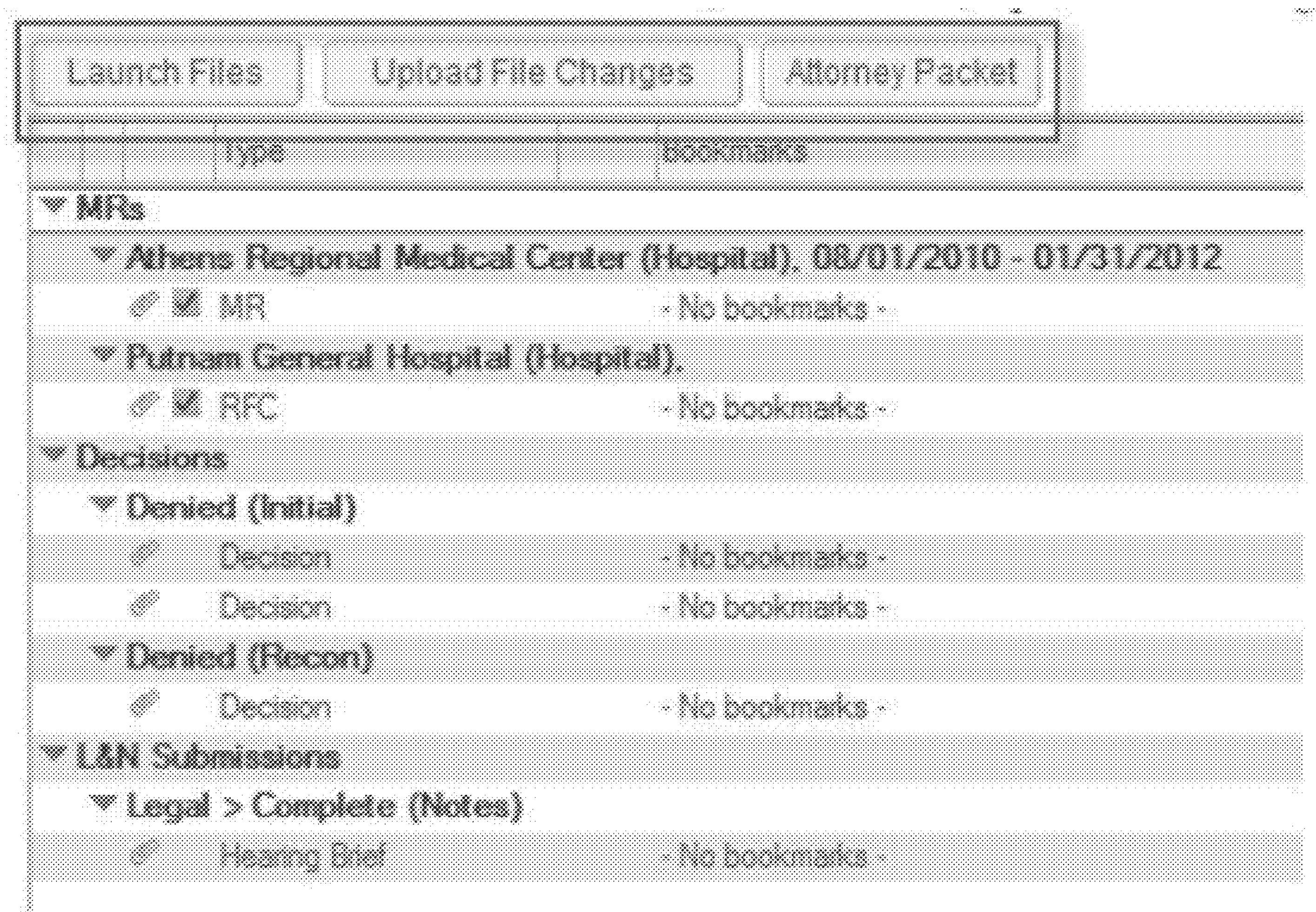


Fig. 186a

The Launch Files button will open all of the documents from the section chosen on the user's computer.

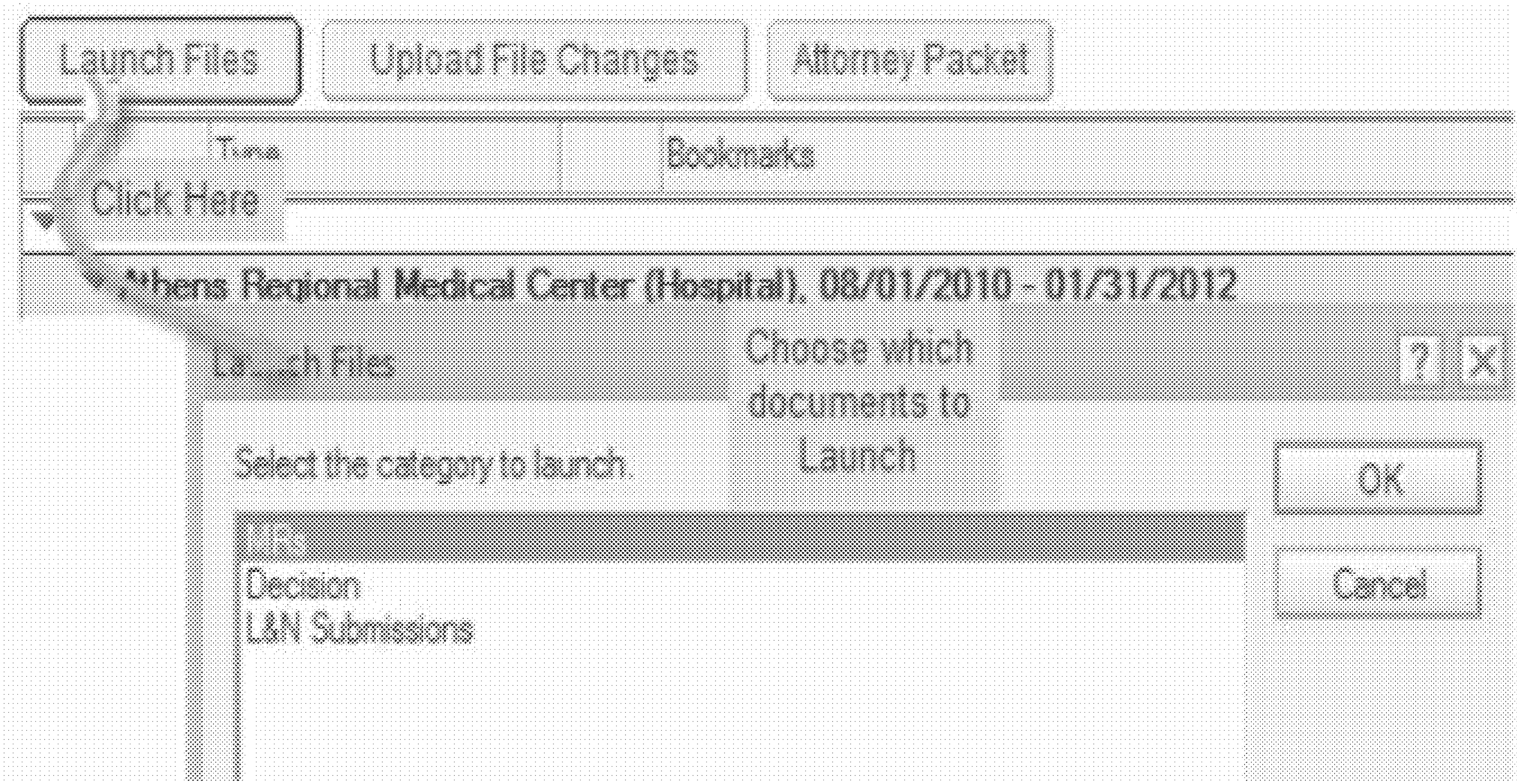


Fig. 186b

The Upload File Changes button allows the user to upload any changes they made to the files they launched.

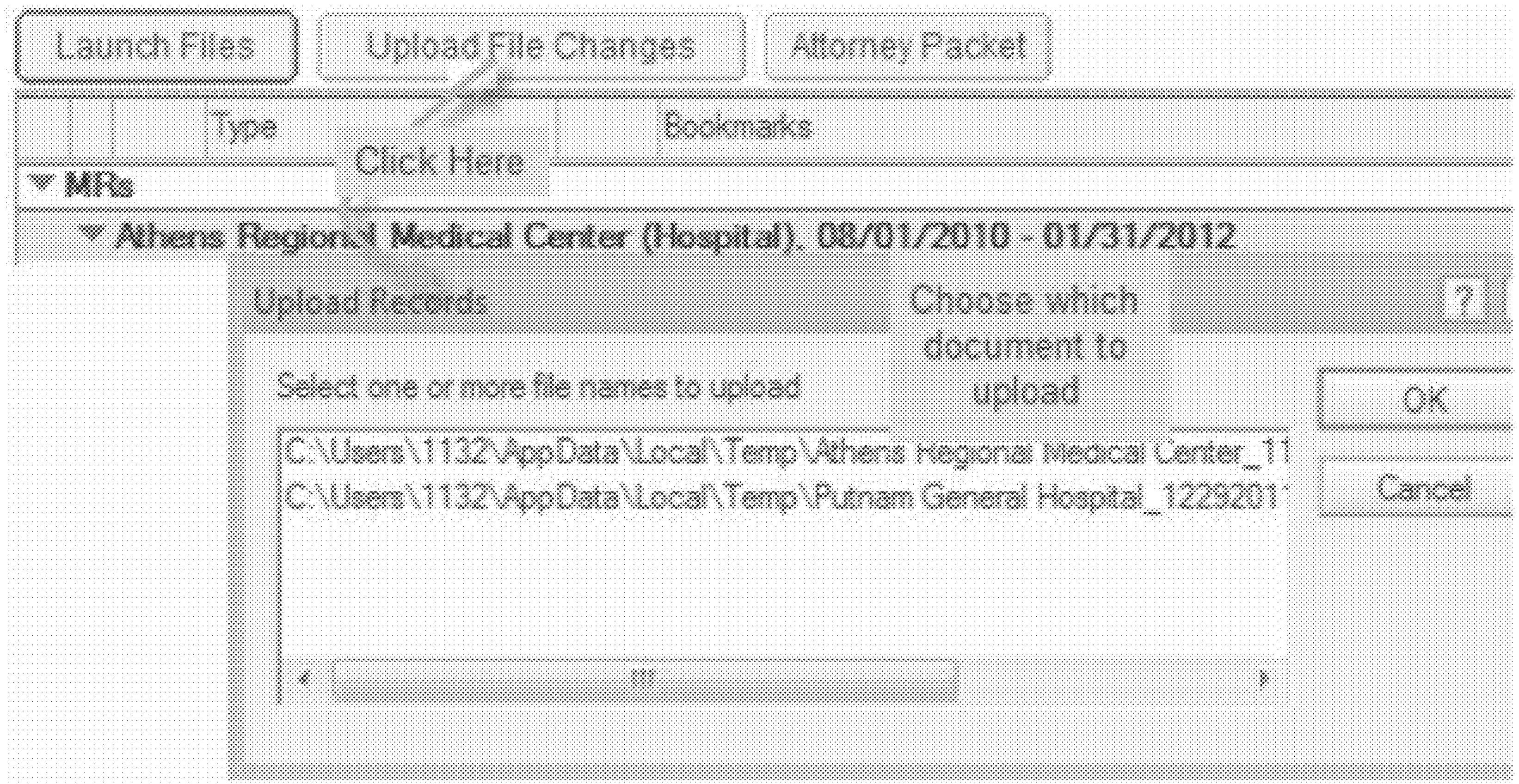


Fig. 186c

The Attorney Packet button generates the documents that the attorney has the client sign at the hearing.

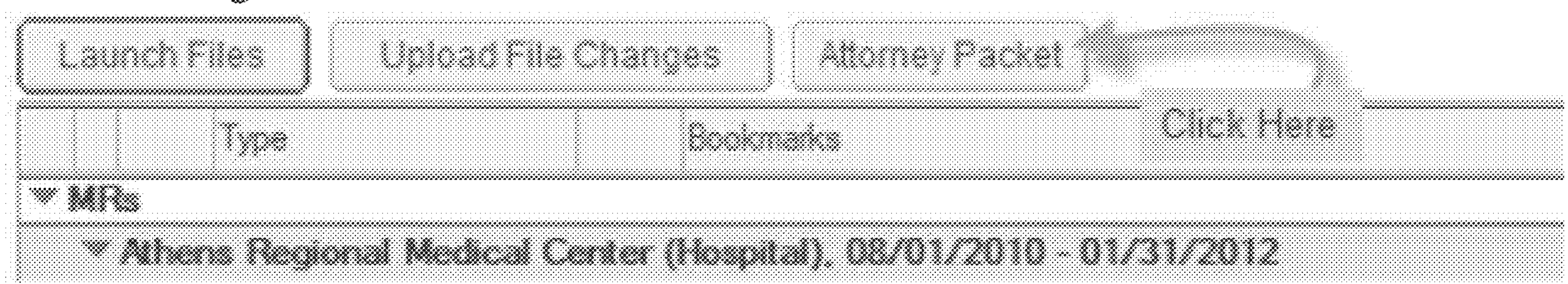


Fig. 187

CSR Landing Page

EZ Claim has designed Landing Pages for different departments that are specific to the data they need to view.

The CSR (Client Representative Specialist) Landing Page is designed for the users that take all incoming calls.

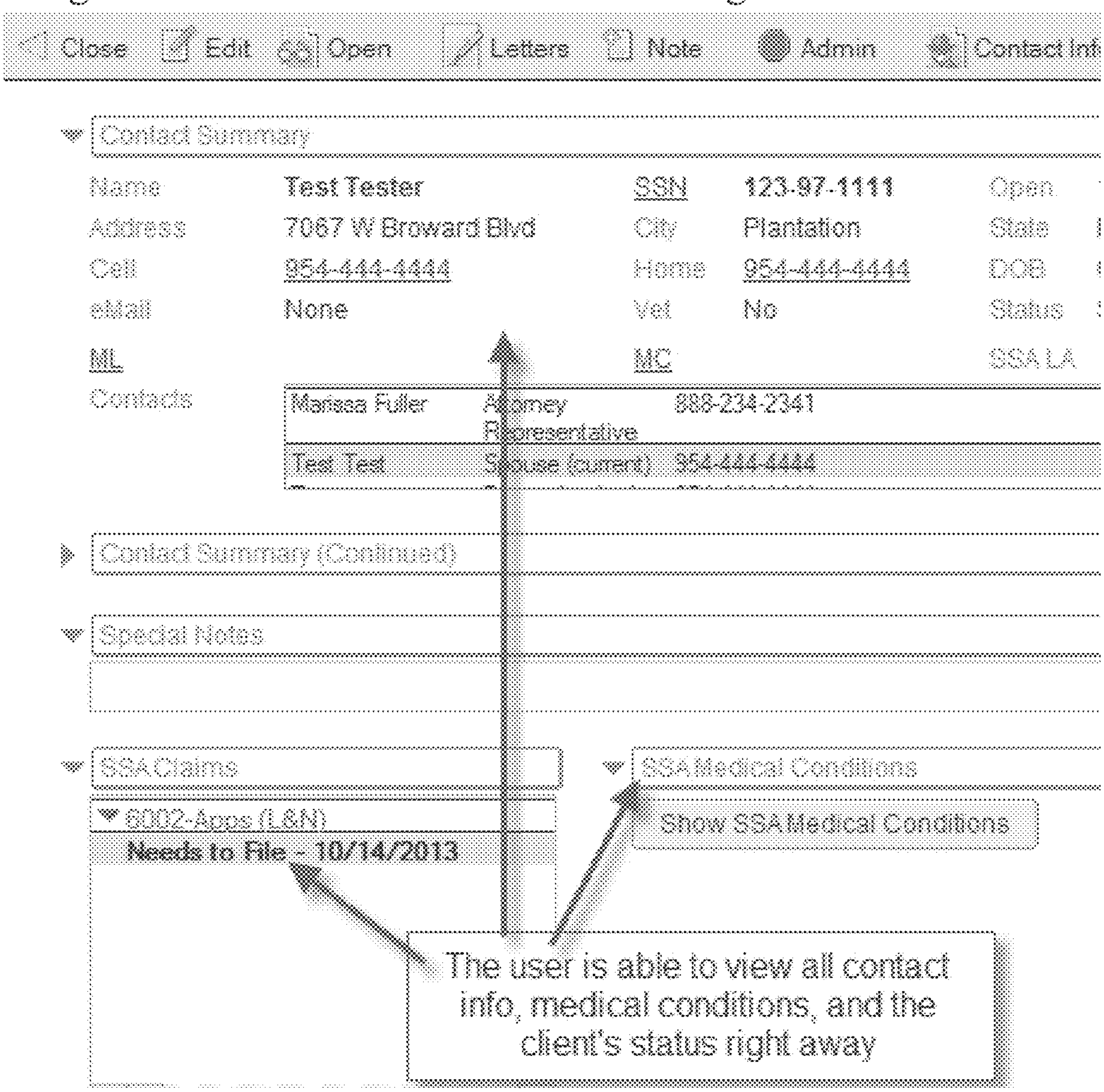
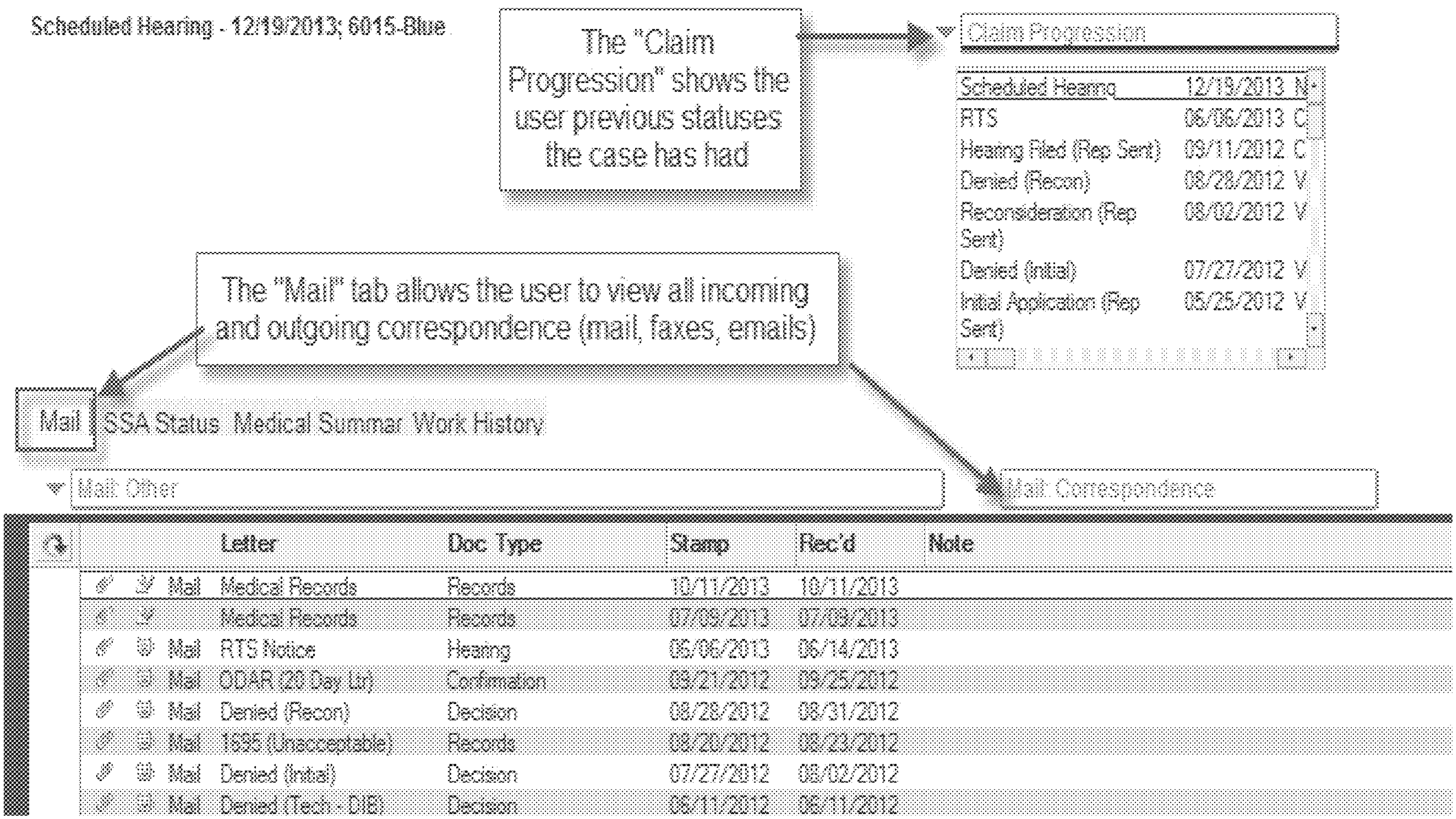


Fig. 188a

The second half of the CSR page consists of the Claim Progression and Tabs that the user can click through to view information regarding the clients claim.



	Letter	Doc Type	Stamp	Rec'd	Note
Mail	Medical Records	Records	10/11/2013	10/11/2013	
	Medical Records	Records	07/09/2013	07/09/2013	
Mail	RTS Notice	Hearing	06/06/2013	06/14/2013	
Mail	ODAR (20 Day Ltr)	Confirmation	09/21/2012	09/25/2012	
Mail	Denied (Recon)	Decision	08/28/2012	08/31/2012	
Mail	1696 (Unacceptable)	Records	08/20/2012	08/23/2012	
Mail	Denied (Initial)	Decision	07/27/2012	08/02/2012	
Mail	Denied (Tech - DIB)	Decision	06/11/2012	06/11/2012	

Fig. 188b

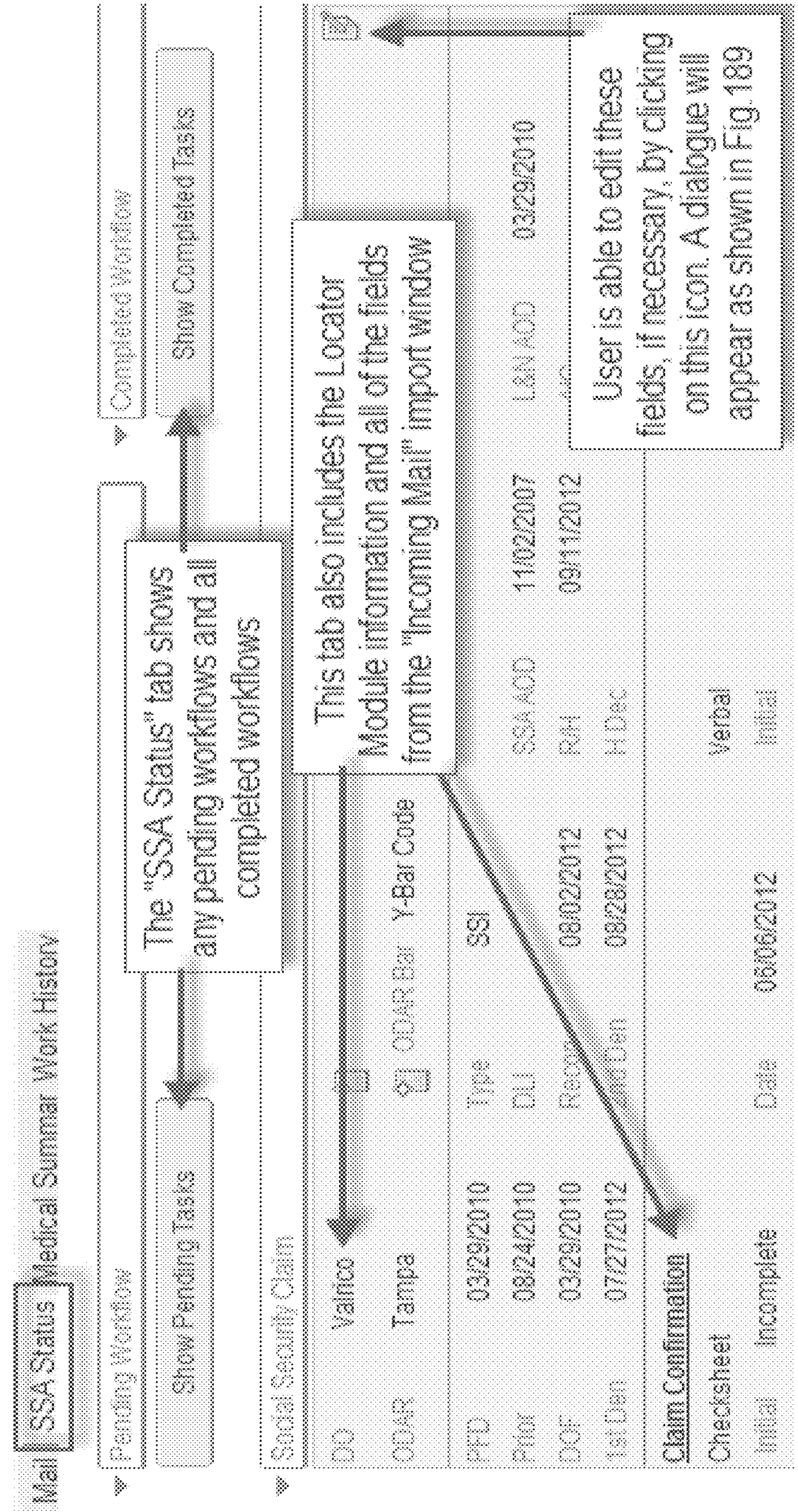

Mail SSA Status Medical Summar Work History
Pending Workflow
Show Pending Tasks
Completed Workflow
Show Completed Tasks
The "SSA Status" tab shows any pending workflows and all completed workflows
Social Security Claim
DO Valrico
ODAR Tampa ODAR Bar Y-Bar Code
PFD 03/29/2010 Type SSI
Prior 08/24/2010 DLI SSA AOD 11/02/2007 L&N AOD 03/29/2010
DOF 03/29/2010 Recon 08/02/2012 RH 09/11/2012
1st Den 07/27/2012 Den 08/28/2012 H Dec
This tab also includes the Locator Module information and all of the fields from the "Incoming Mail" import window
User is able to edit these fields, if necessary, by clicking on this icon. A dialogue will appear as shown in Fig. 189
Claim Confirmation
Checksheet Verbal
Initial Incomplete Date 06/06/2012 Initial

Fig. 189a

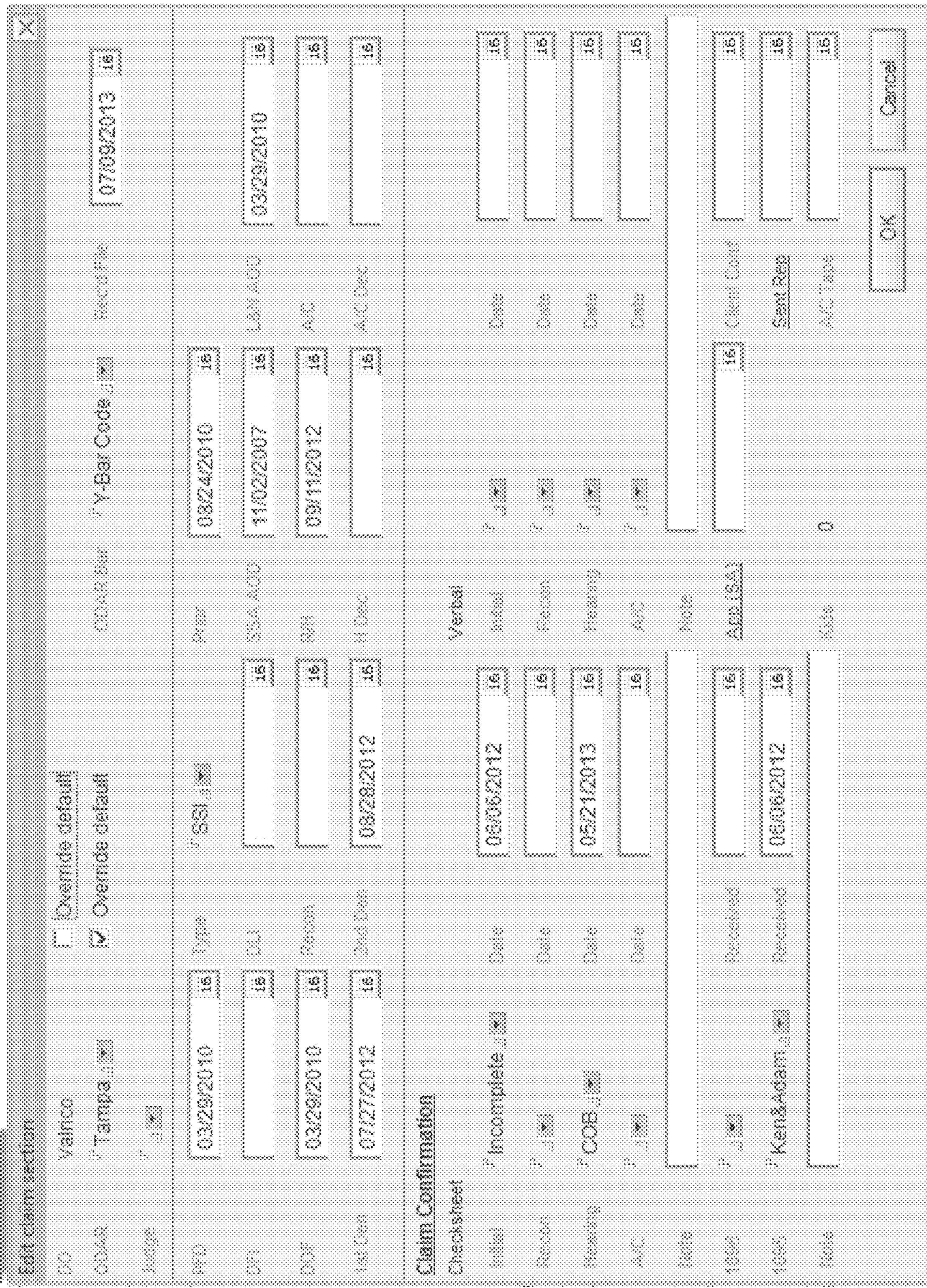
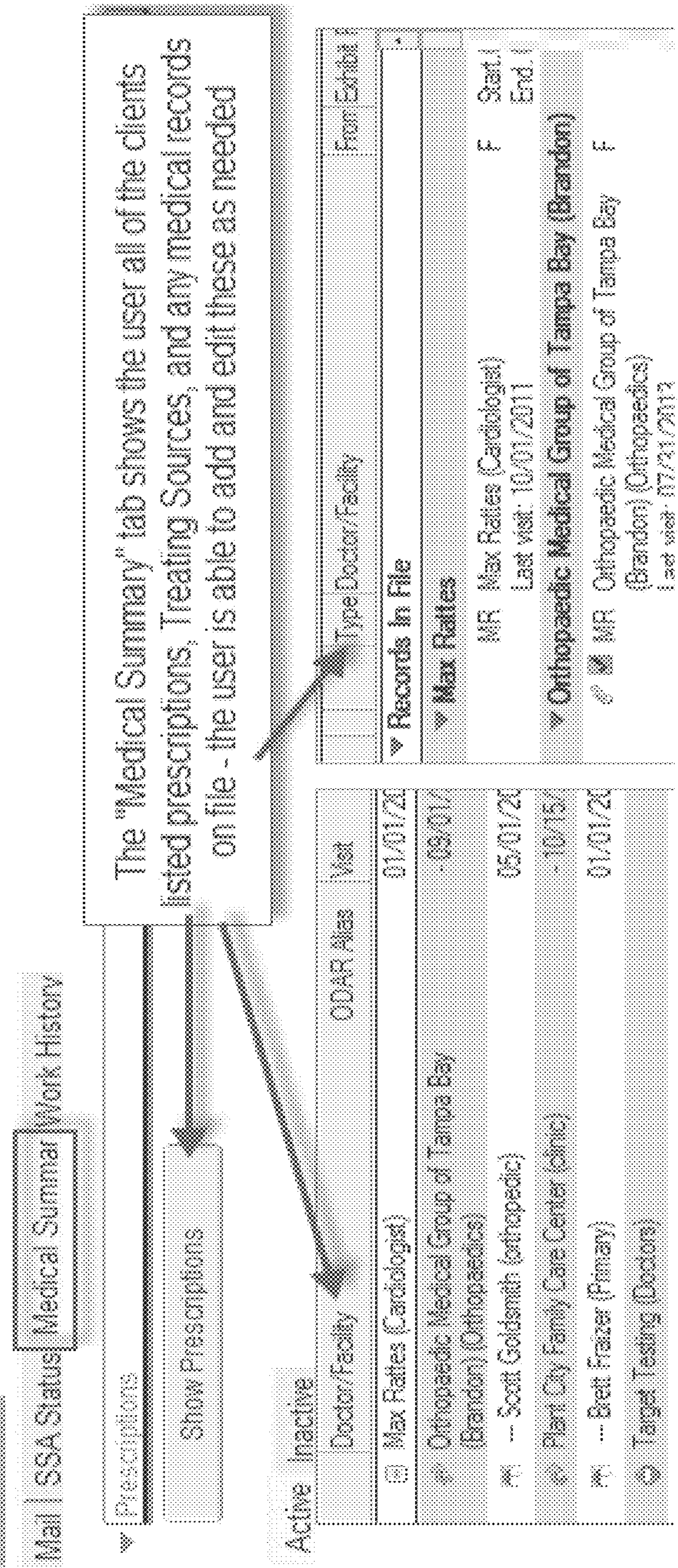

Edit claim action
Valnco
Tampa
Override default
Override default
Y-Bar Code
07/09/2013
03/29/2010
SSI
08/24/2010
11/02/2007
03/29/2010
03/29/2010
09/11/2012
07/27/2012
08/28/2012
Claim Confirmation
Checksheet
Incomplete
06/06/2012
Verbal
COB
05/21/2013
Ken&Adam
06/06/2012
0
OK
Cancel

Fig. 189b


Mail | SSA Status | Medical Summar | Work History
Prescriptions
Show Prescriptions
Active
Inactive
Doctor/Facility
ODAR Alias
Visit
Max Rattes (Cardiologist)
Orthopaedic Medical Group of Tampa Bay (Brandon) (Orthopaedics)
--- Scott Goldsmith (orthopedic)
Plant City Family Care Center (clinic)
--- Brett Frazer (Primary)
Target Testing (Doctors)
The "Medical Summary" tab shows the user all of the clients listed prescriptions, Treating Sources, and any medical records on file - the user is able to add and edit these as needed
Type Doctor/Facility
From Exhibit
Records In File
Max Rattes
MR Max Rattes (Cardiologist)
Last visit: 10/01/2011
Orthopaedic Medical Group of Tampa Bay (Brandon)
MR Orthopaedic Medical Group of Tampa Bay (Brandon) (Orthopaedics)

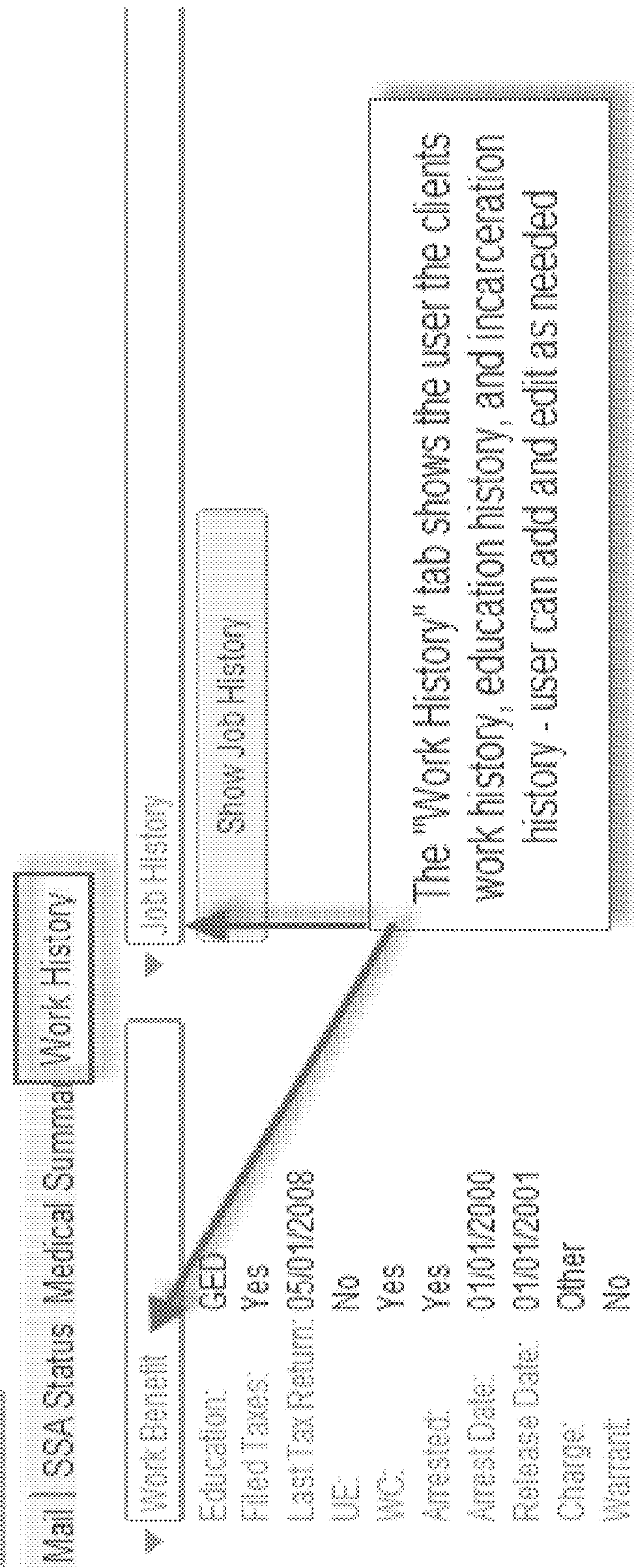
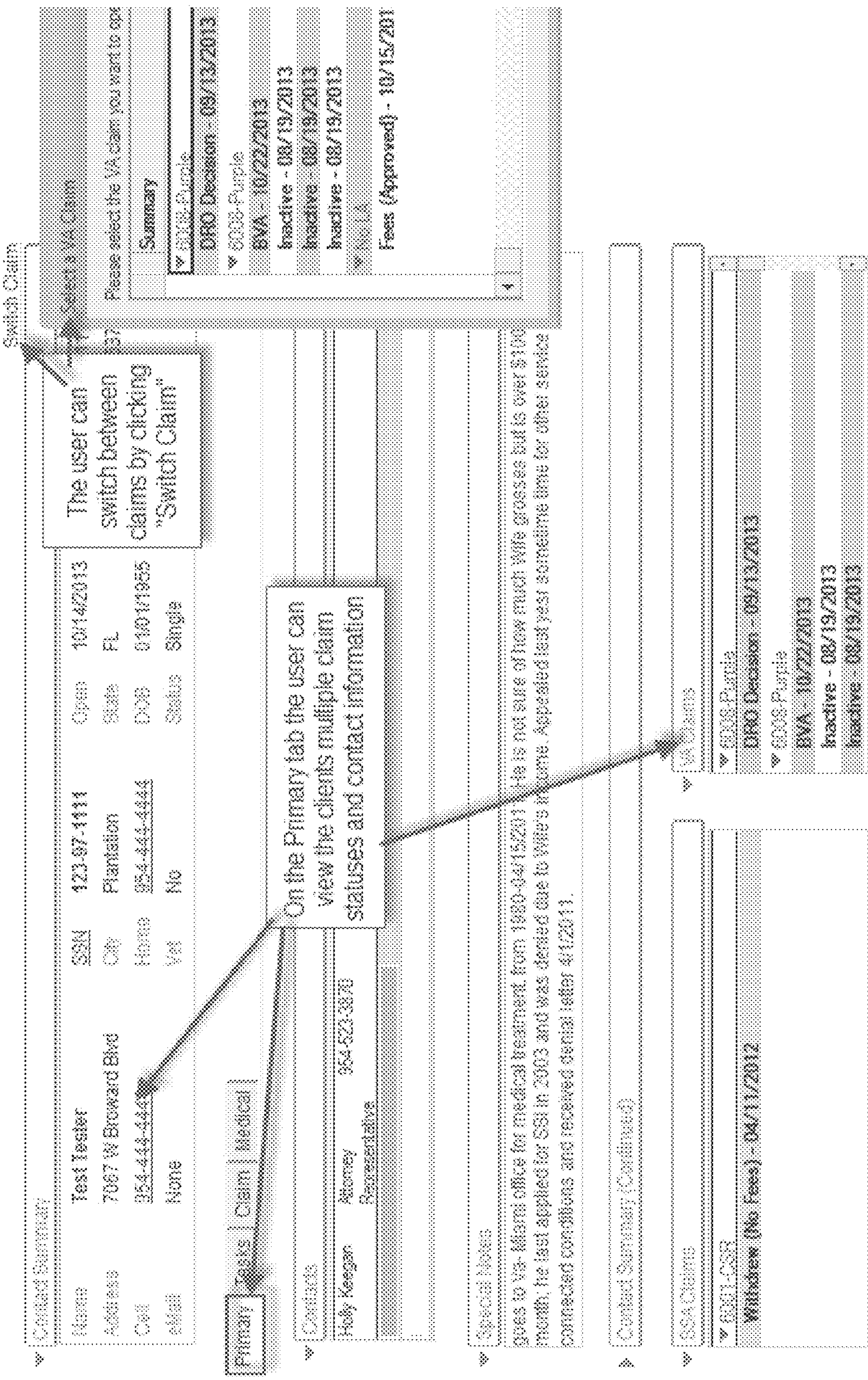

Mail
SSA Status
Medical Summa
Work History
Work Benefit
Job History
Show Job History
Education: GED
Filed Taxes: Yes
Last Tax Return: 05/01/2008
UE: No
WC: Yes
Arrested: Yes
Arrest Date: 01/01/2000
Release Date: 01/01/2001
Charge: Other
Warrant: No
The "Work History" tab shows the user the clients work history, education history, and incarceration history - user can add and edit as needed

Fig. 190

Fig. 191a

VA Landing Page



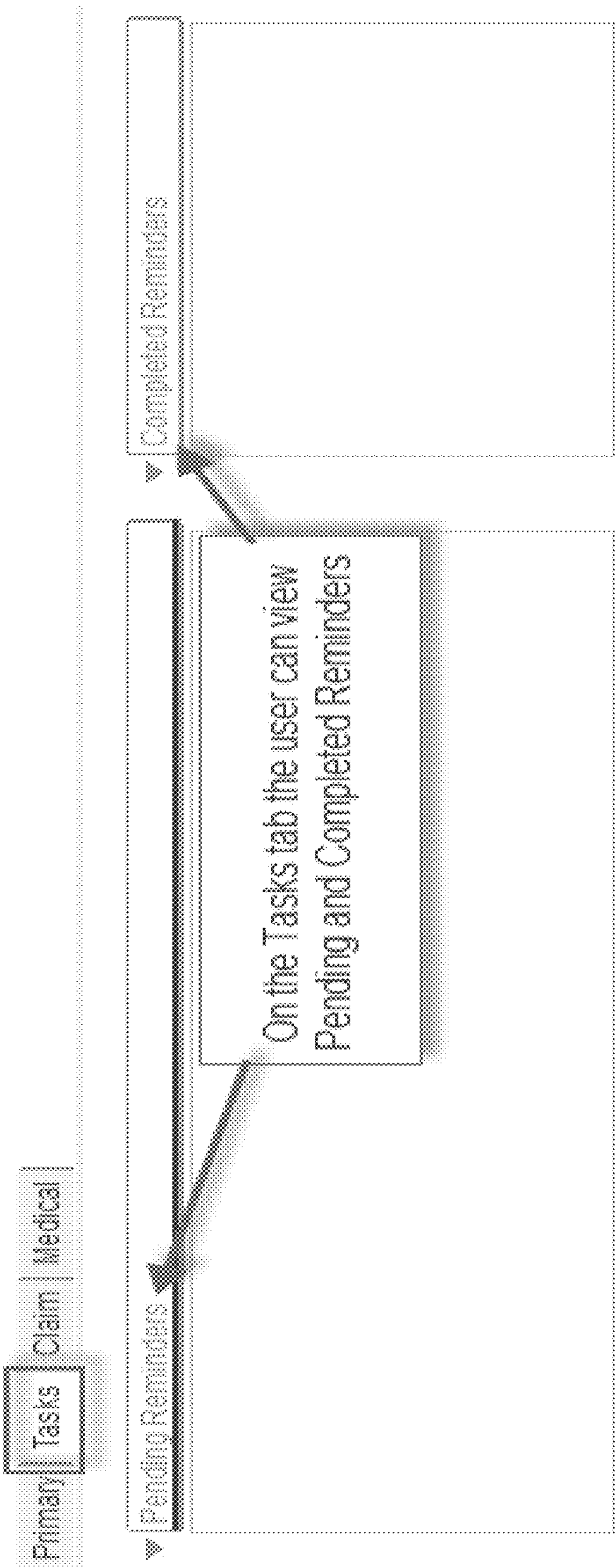
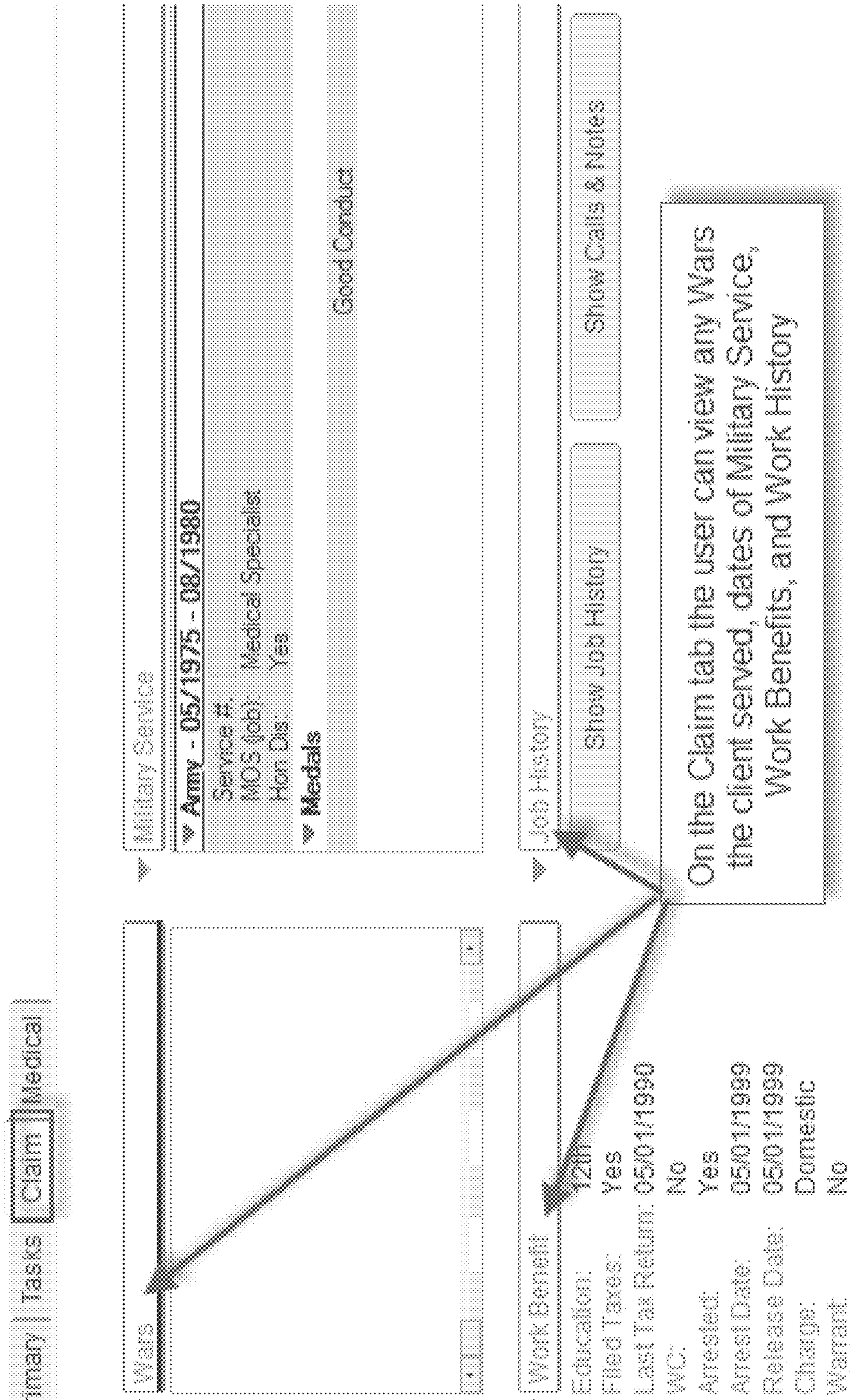

Primary
Tasks
Claim
Medical
Pending Reminders
Completed Reminders
On the Tasks tab the user can view Pending and Completed Reminders

Fig. 191b

Fig. 191c


Primary
Tasks
Claim
Medical
Wars
Military Service
Army - 05/1975 - 08/1980
Service #:
MOS (job) Medical Specialist
Hon Dis: Yes
Medals
Good Conduct
Work Benefit
Education: 12th
Filed Taxes: Yes
Last Tax Return: 05/01/1990
WC: No
Arrested: Yes
Arrest Date: 05/01/1999
Release Date: 05/01/1999
Charge: Domestic
Warrant: No
Job History
Show Job History
Show Calls & Notes
On the Claim tab the user can view any Wars the client served, dates of Military Service, Work Benefits, and Work History

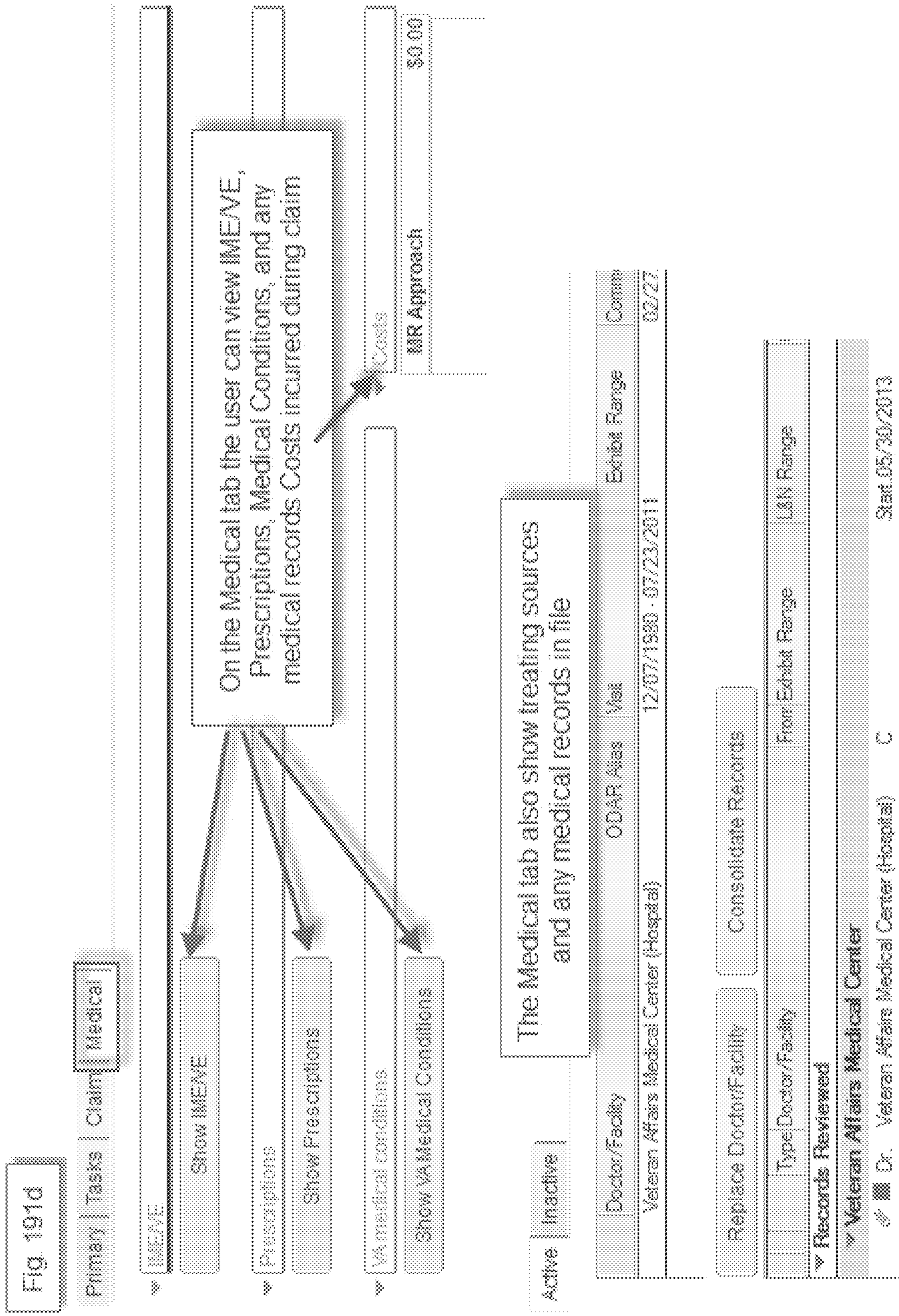

Primary | Tasks | Claim | Medical
IME/VE
Show IME/VE
Prescriptions
Show Prescriptions
VA medical conditions
Show VA Medical Conditions
On the Medical tab the user can view IME/VE, Prescriptions, Medical Conditions, and any medical records Costs incurred during claim
Costs
MR Approach
$0.00
Active
Inactive
The Medical tab also show treating sources and any medical records in file
Doctor/Facility
ODAR Alias
Visit
Exhibit Range
Comm
Veteran Affairs Medical Center (Hospital)
12/07/1980 - 07/23/2011
02/27
Replace Doctor/Facility
Consolidate Records
Type Doctor/Facility
From Exhibit Range
L&N Range
Records Reviewed
Veteran Affairs Medical Center
Dr. Veteran Affairs Medical Center (Hospital)
C
Start 05/30/2013

Fig. 191d

Fig. 192a

Calls and Notes

Calls and Notes are used in the database to track what is going in a client's claim. It may describe communication with the client, court, etc. or may describe notes that pertain to the client or claim.

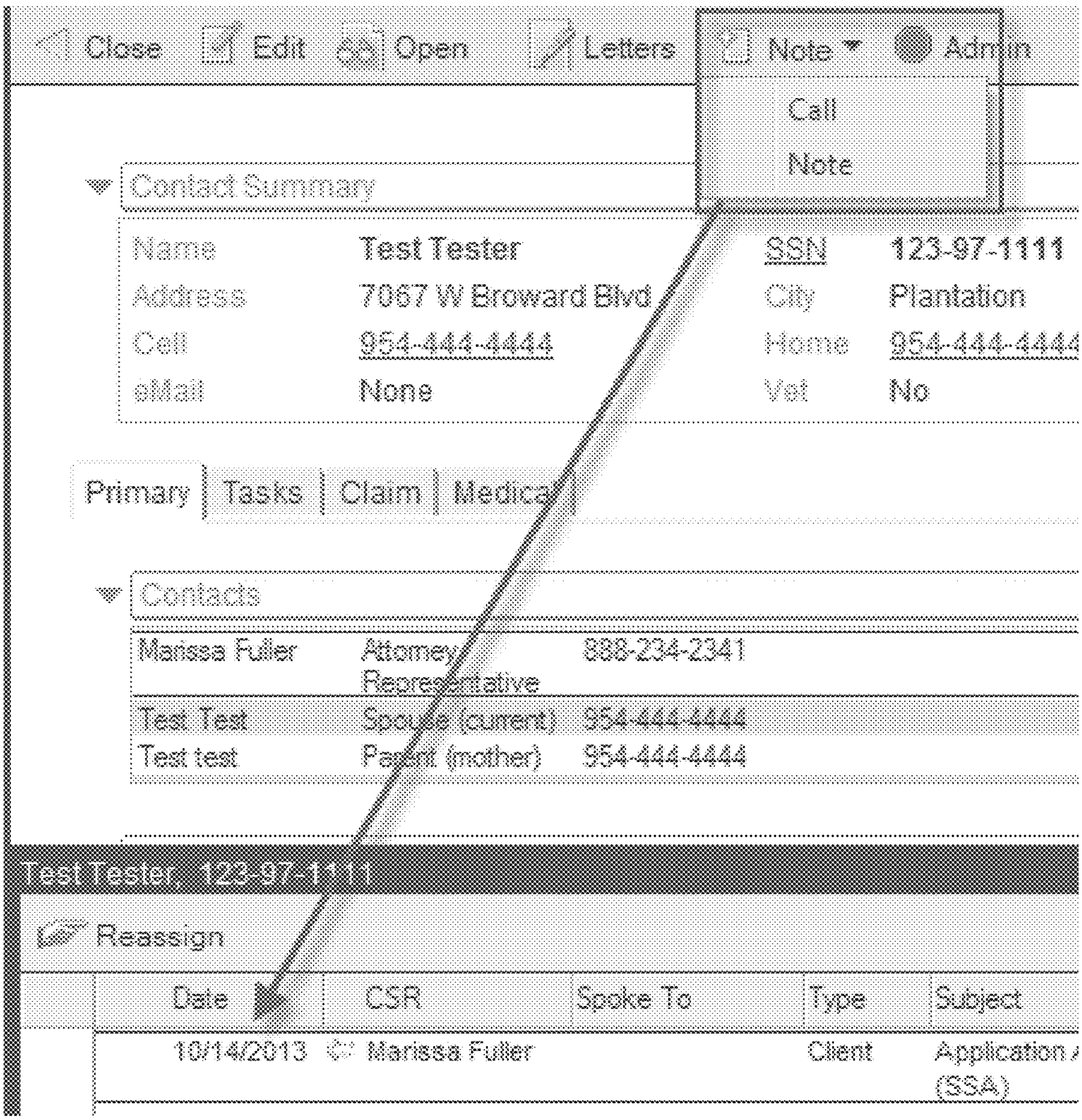


Fig. 192b

A Note is selected to track Calls and Notes

If the user selects Call then they indicate if it's an Incoming Call or Outgoing Call.

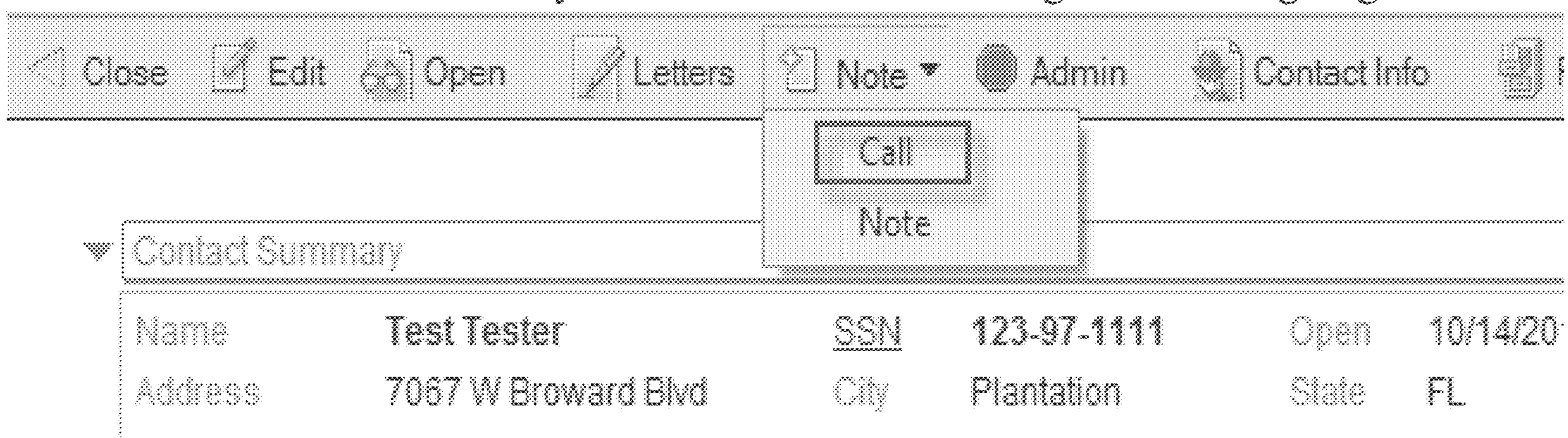


Fig. 193a

This dialogue will appear for the user to choose from a list who they spoke to and the subject of the call -

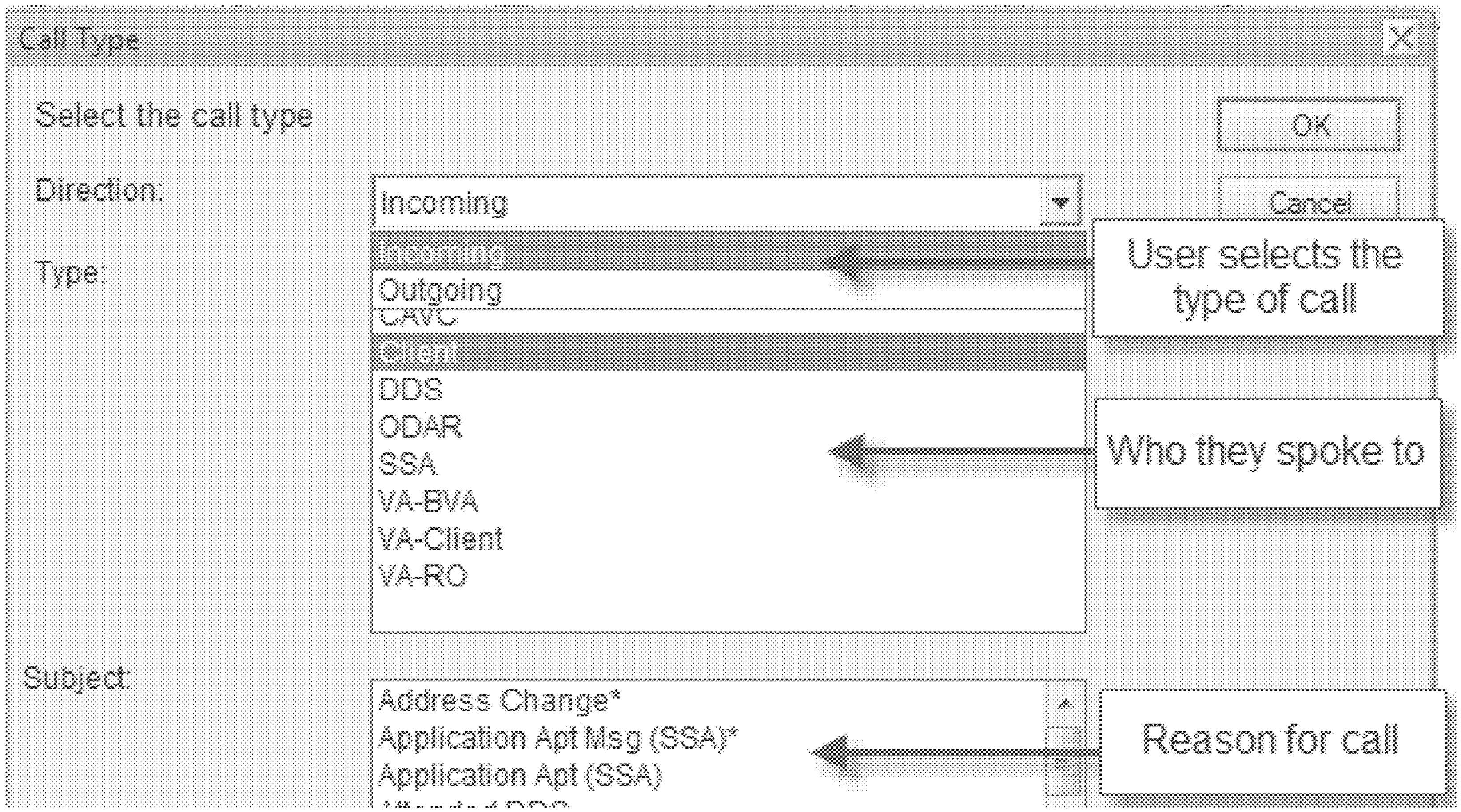


Fig. 193b

Once user clicks OK the user must select a subject and enter the details regarding the Call

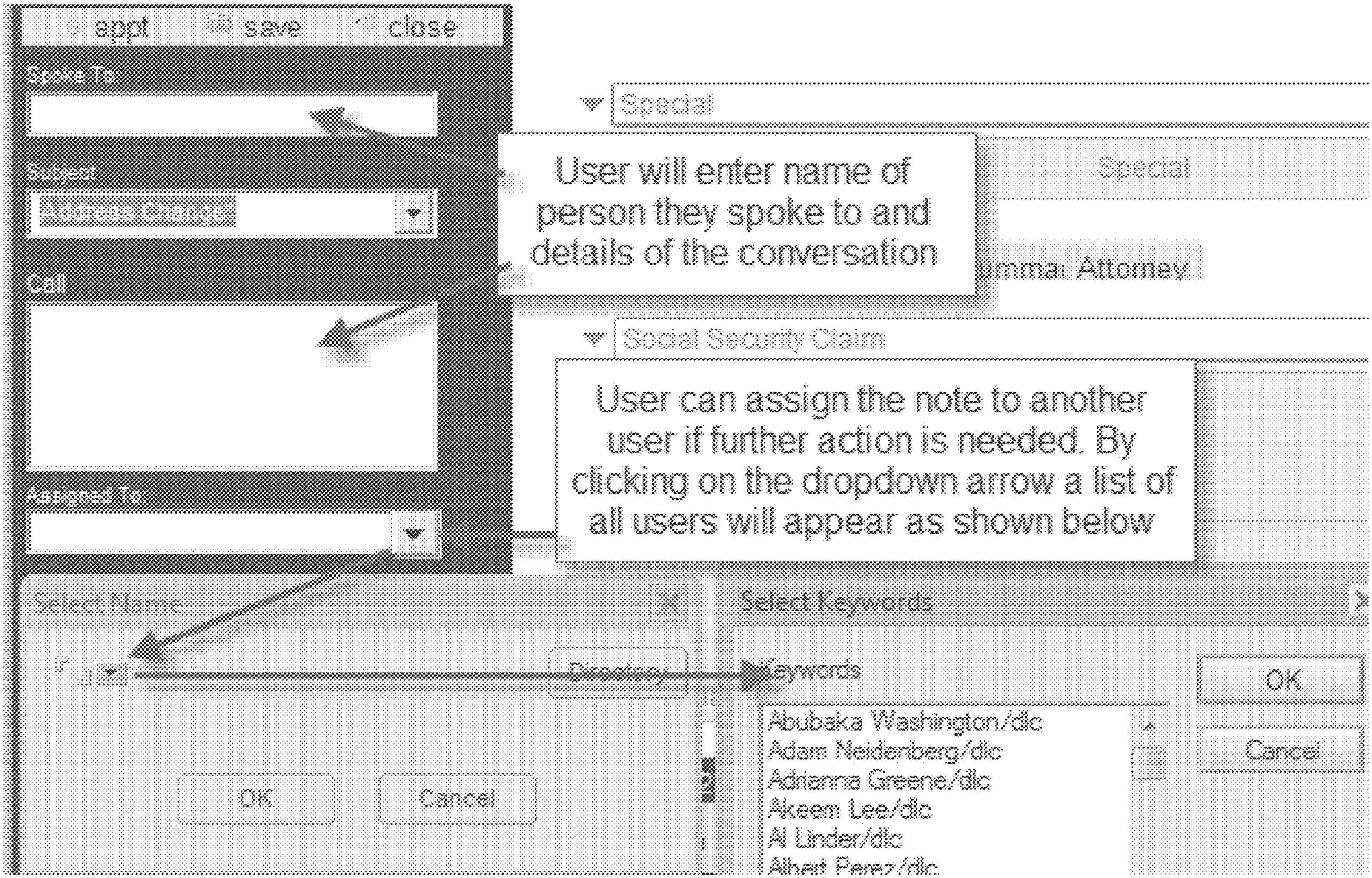


Fig. 194a

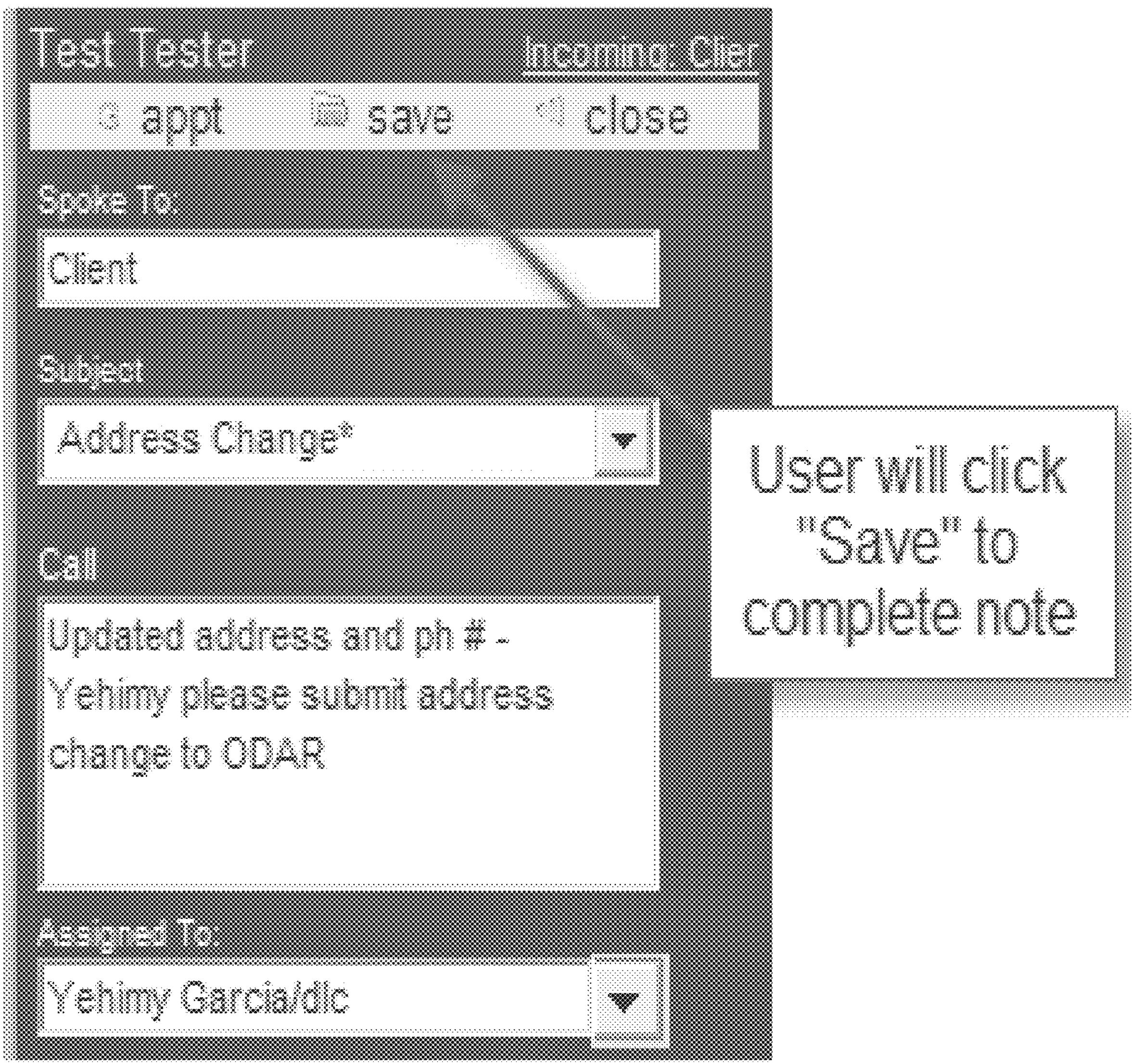

Test Tester
Incoming: Clier
appt
save
close
Spoke To:
Client
Subject
Address Change*
Call
Updated address and ph # - Yehimy please submit address change to ODAR
Assigned To:
Yehimy Garcia/dlc
User will click "Save" to complete note

Fig. 194b

Note will then appear in clients Calls & Notes shown at the bottom of their claim:

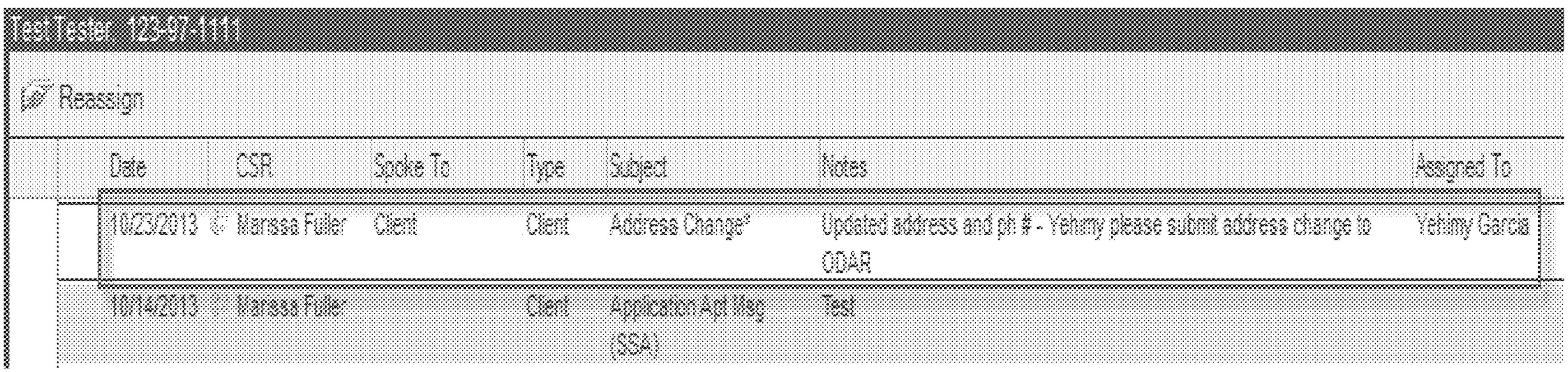


Fig. 194c

Each user has a "My Assignments" option

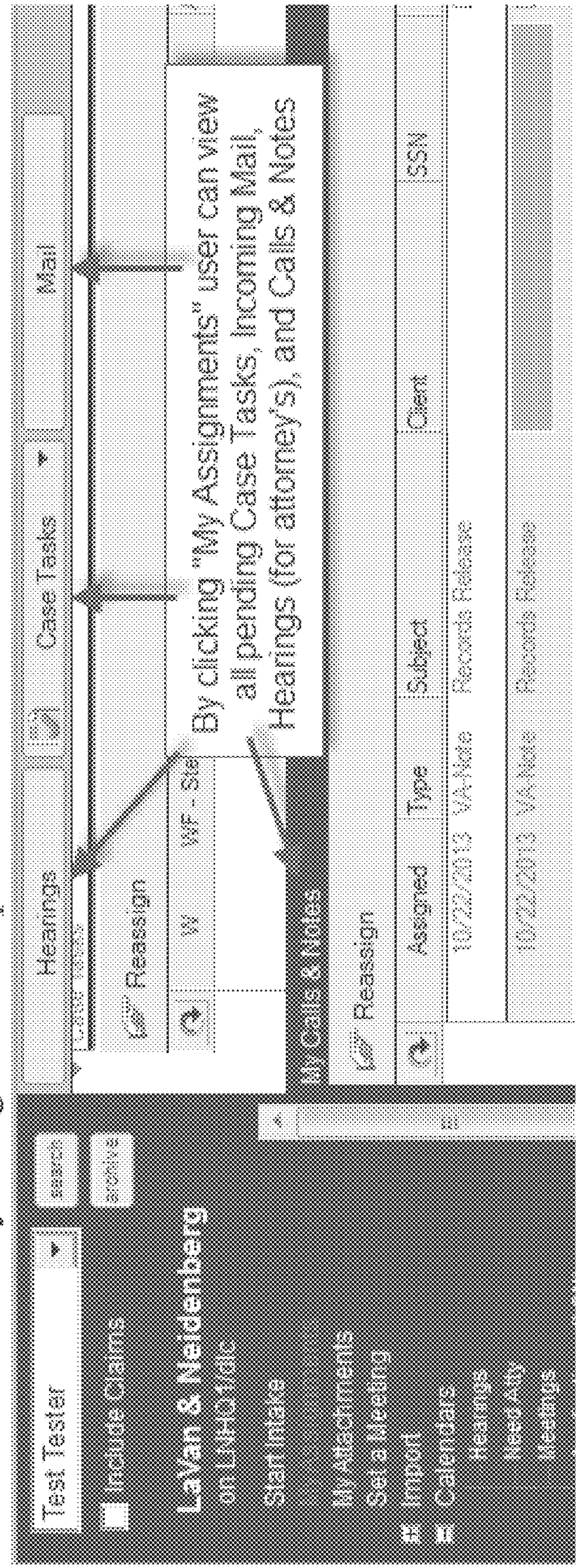


Fig. 195a

To complete the note the user will double click the note:

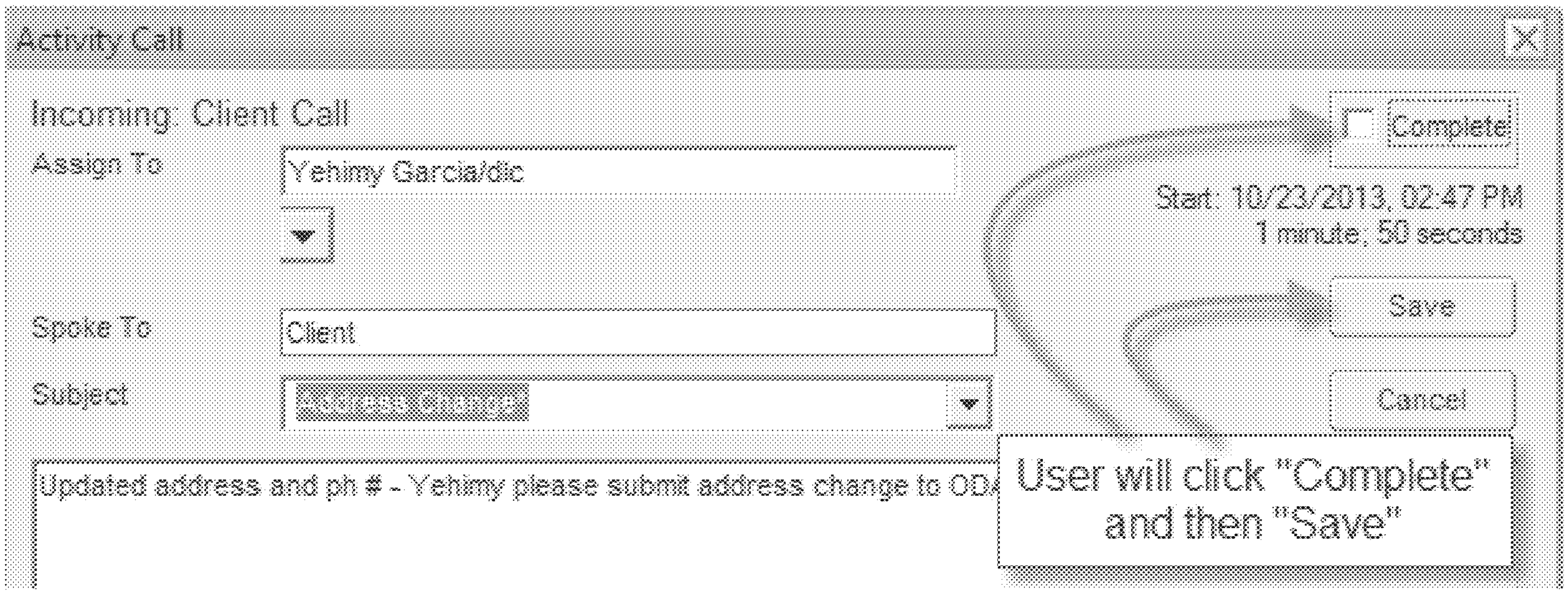


Fig. 195b

After clicking "Complete" and "Save" the user will be prompted to enter a follow up note. The note will be entered the same way as explained figures 192 and 193.

To help prevent "user error" we have created a safety list for notes that must have further action taken:

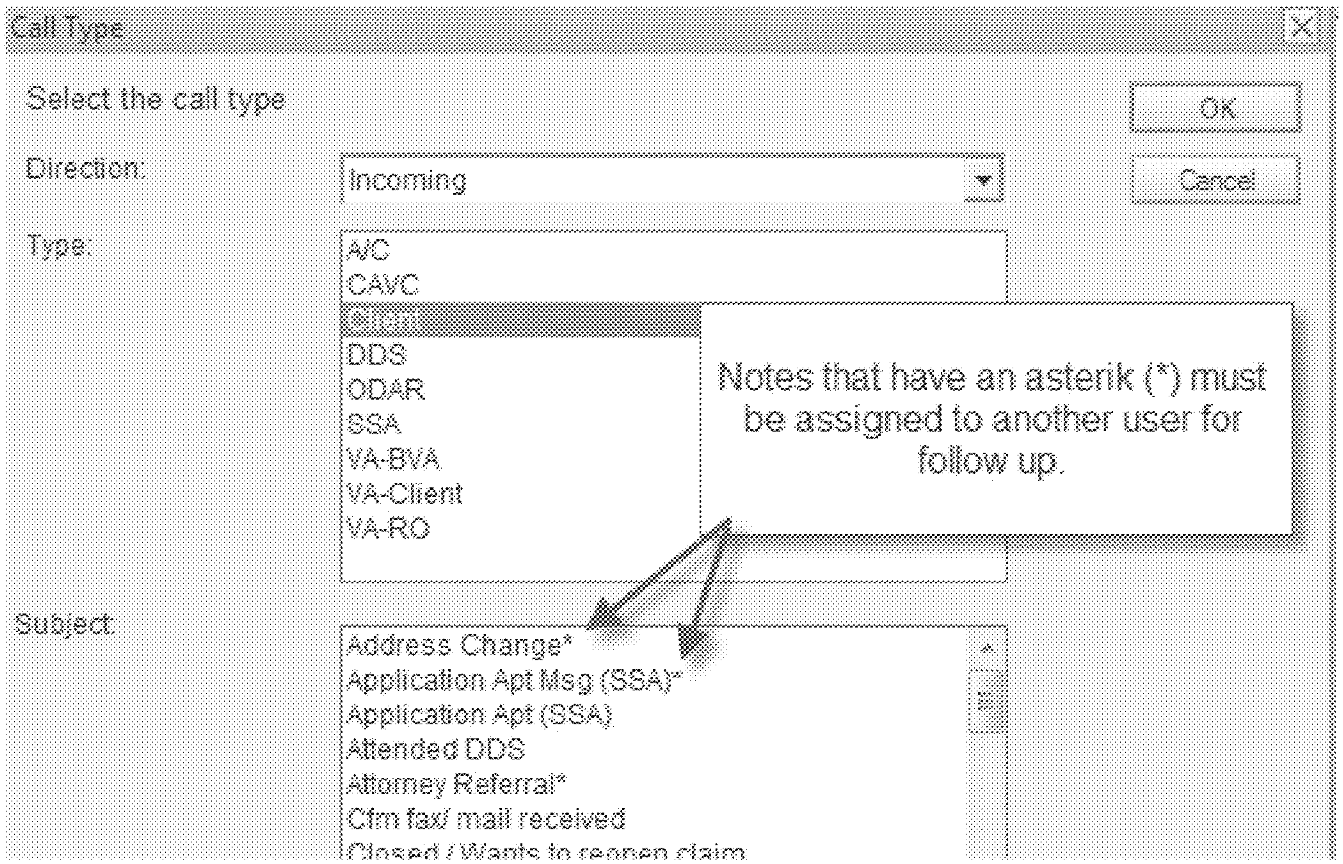


Fig. 195c

If a note with an asterisk (*) is not assigned it will appear on this view which is checked daily:

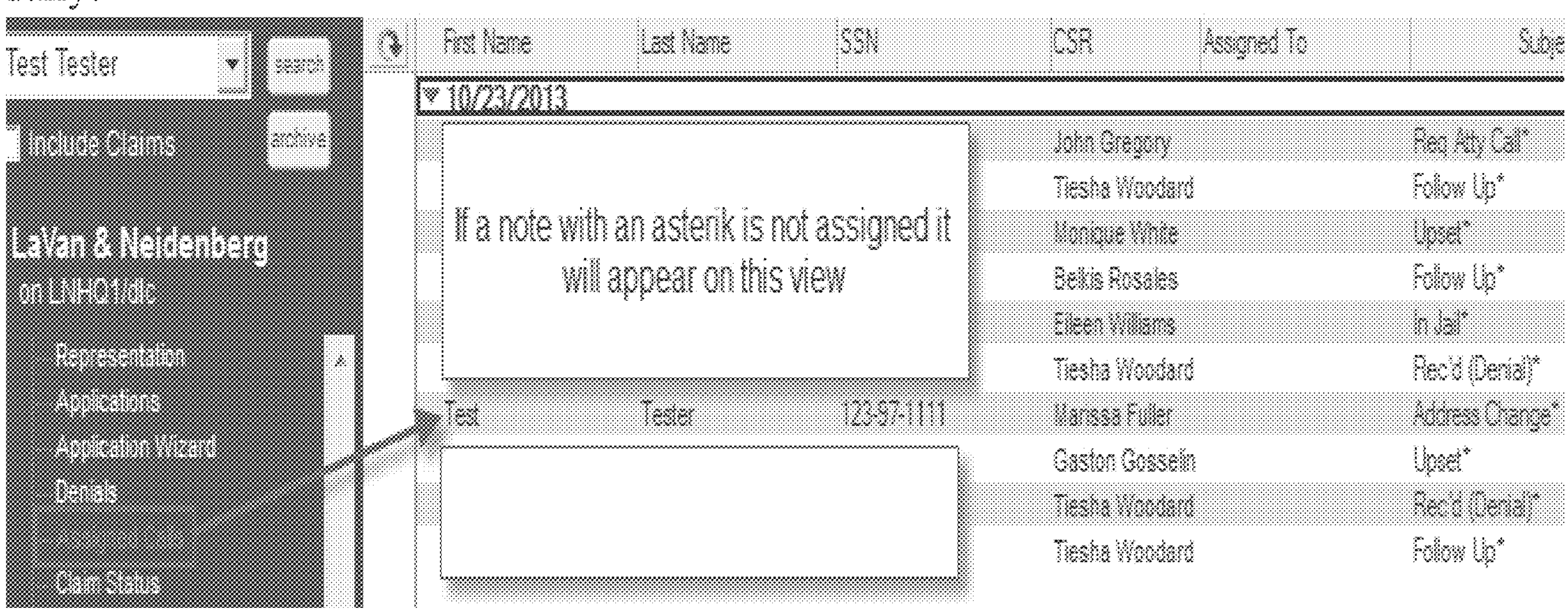


Fig. 196

Audit History

Audit History tracks changes made throughout the database when a user edits the client's data.

The "Open" button allows the user to toggle back and forth between "Audit History" and "Calls & Notes".

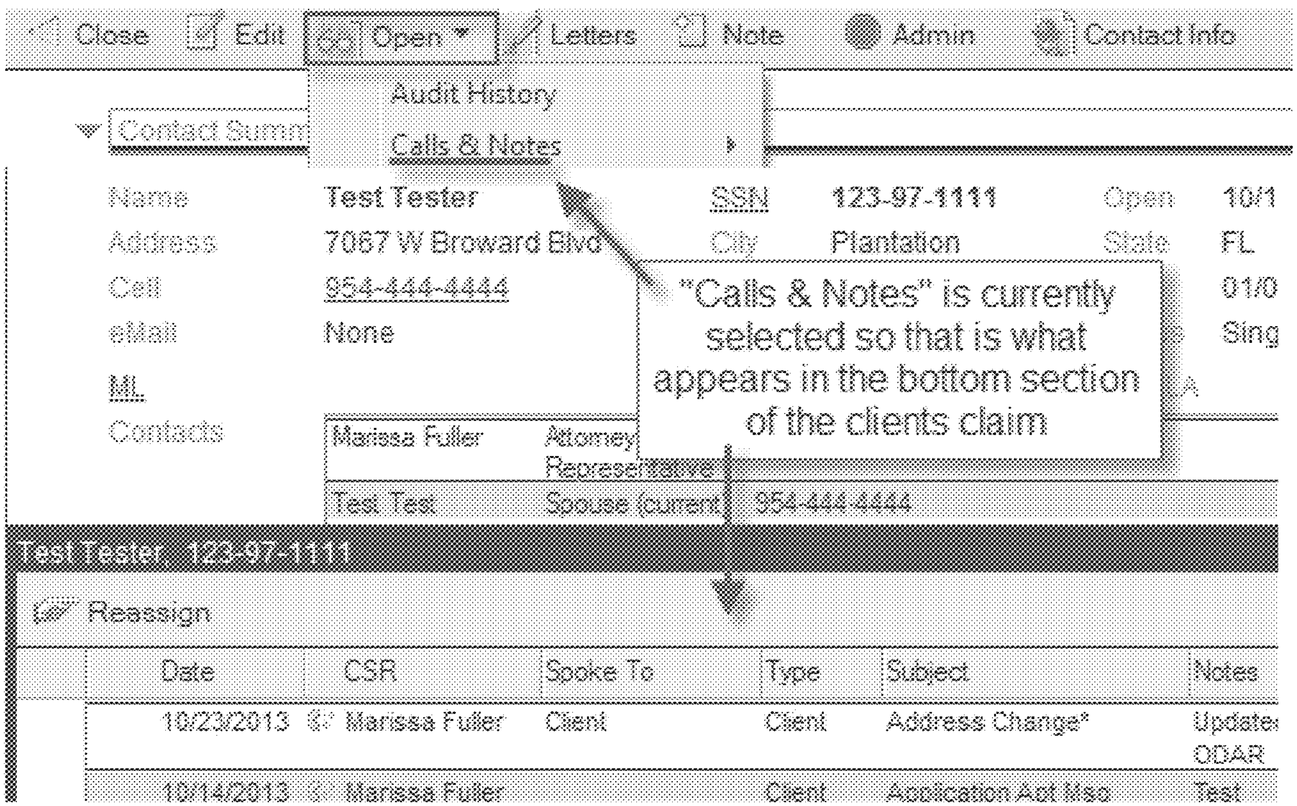


Fig. 197a

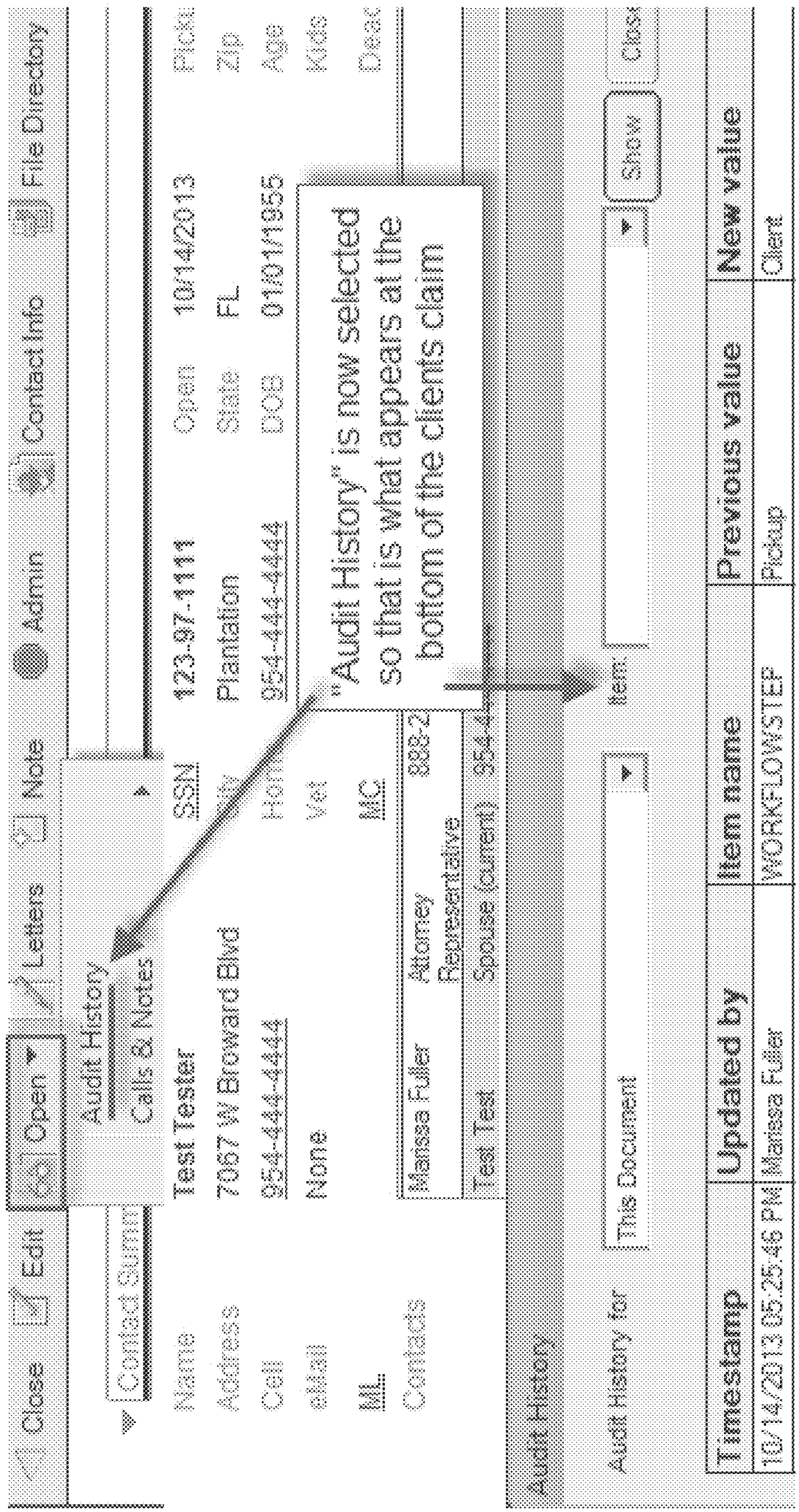

Close
Edit
Open
Letters
Note
Admin
Contact Info
File Directory
Audit History
Calls & Notes
Name
Test Tester
SSN
123-97-1111
Open
10/14/2013
Address
7067 W Broward Blvd
Plantation
State
FL
Zip
Cell
954-444-4444
954-444-4444
DOB
01/01/1955
Age
eMail
None
Vet
Kids
ML
MC
Contacts
Marissa Fuller
Attorney
Representative
Test Test
Spouse (current)
"Audit History" is now selected so that is what appears at the bottom of the clients claim
Audit History
Audit History for
This Document
Item
Show
Timestamp
Updated by
Item name
Previous value
New value
10/14/2013 05:25:46 PM
Marissa Fuller
WORKFLOWSTEP
Pickup
Client

Fig. 197b

The "Audit History" tracks changes such as - Address changes (example in print screen below), name changes, claim status changes, etc.

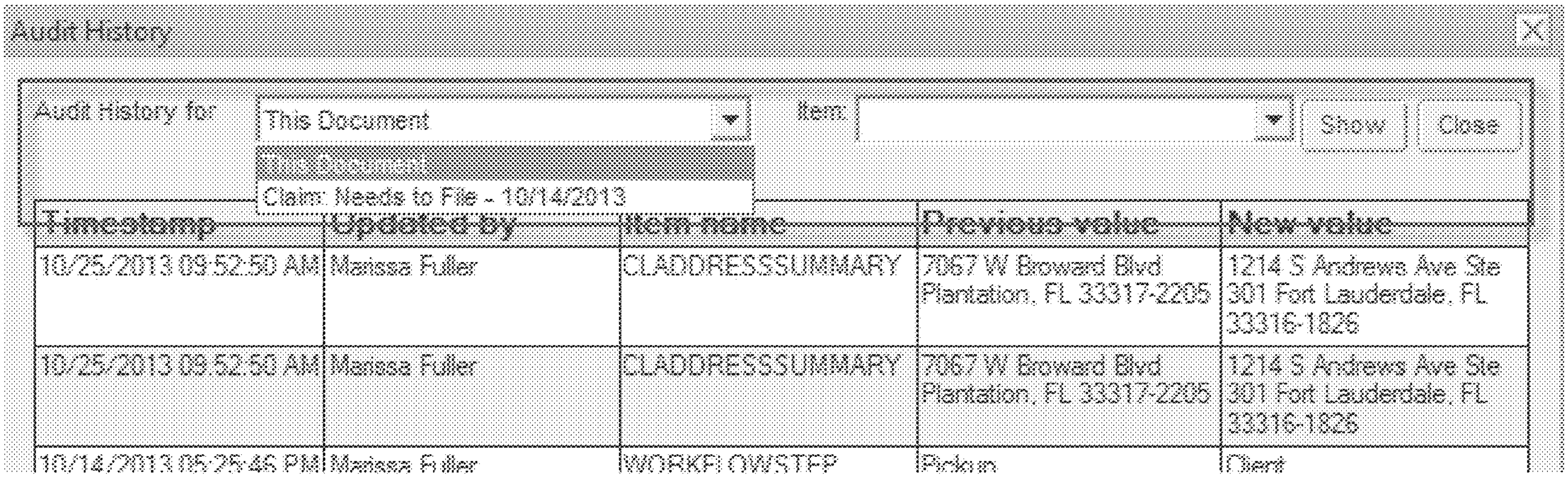
Audit History

Audit History for: This Document — Item: — Show — Close

Timestamp	Updated by	Item name	Previous value	New value
10/25/2013 09:52:50 AM	Marissa Fuller	CLADDRESSSUMMARY	7067 W Broward Blvd Plantation, FL 33317-2205	1214 S Andrews Ave Ste 301 Fort Lauderdale, FL 33316-1826
10/25/2013 09:52:50 AM	Marissa Fuller	CLADDRESSSUMMARY	7067 W Broward Blvd Plantation, FL 33317-2205	1214 S Andrews Ave Ste 301 Fort Lauderdale, FL 33316-1826
10/14/2013 05:25:46 PM	Marissa Fuller	WORKFLOWSTEP	Pickup	Client
10/14/2013 05:18:44 PM	Marissa Fuller	DISTRICTOFFICENAME		Sunrise

Fig. 198

These fields allow the user to filter their search based on the criteria selected:



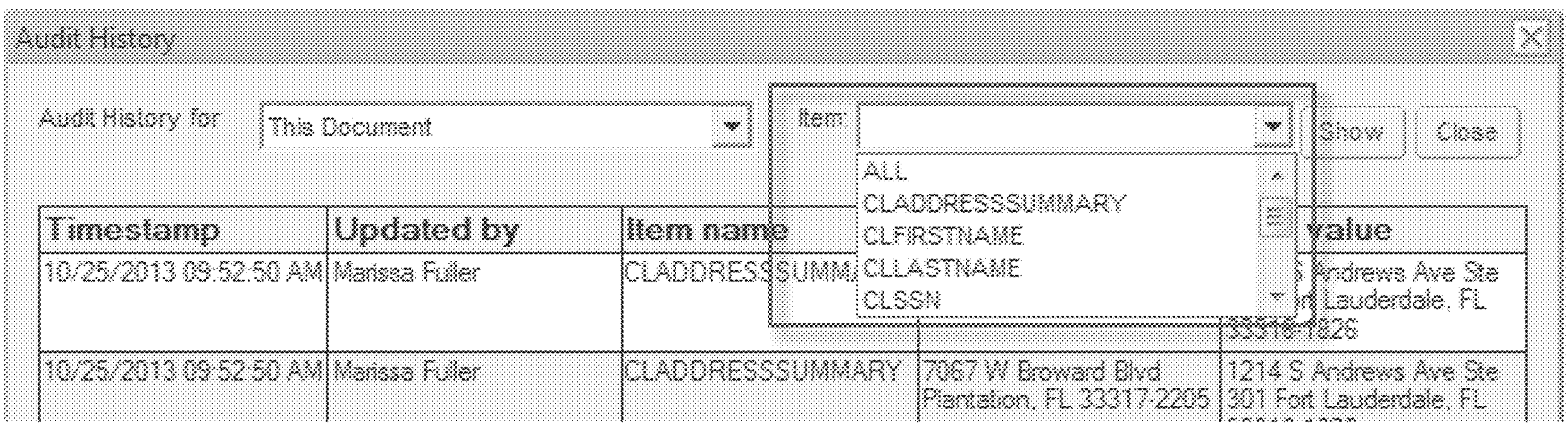


Fig. 199a

File Directory

Each client has a "File Directory" where all of their incoming and outgoing correspondence is stored.

To access the File Directory:

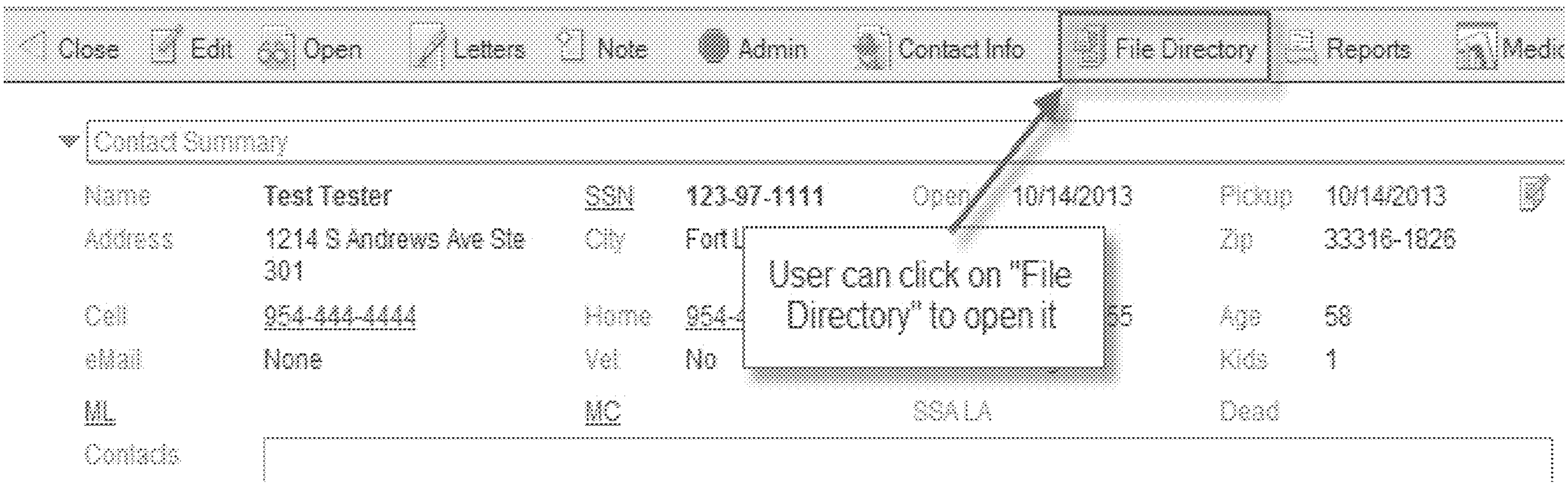
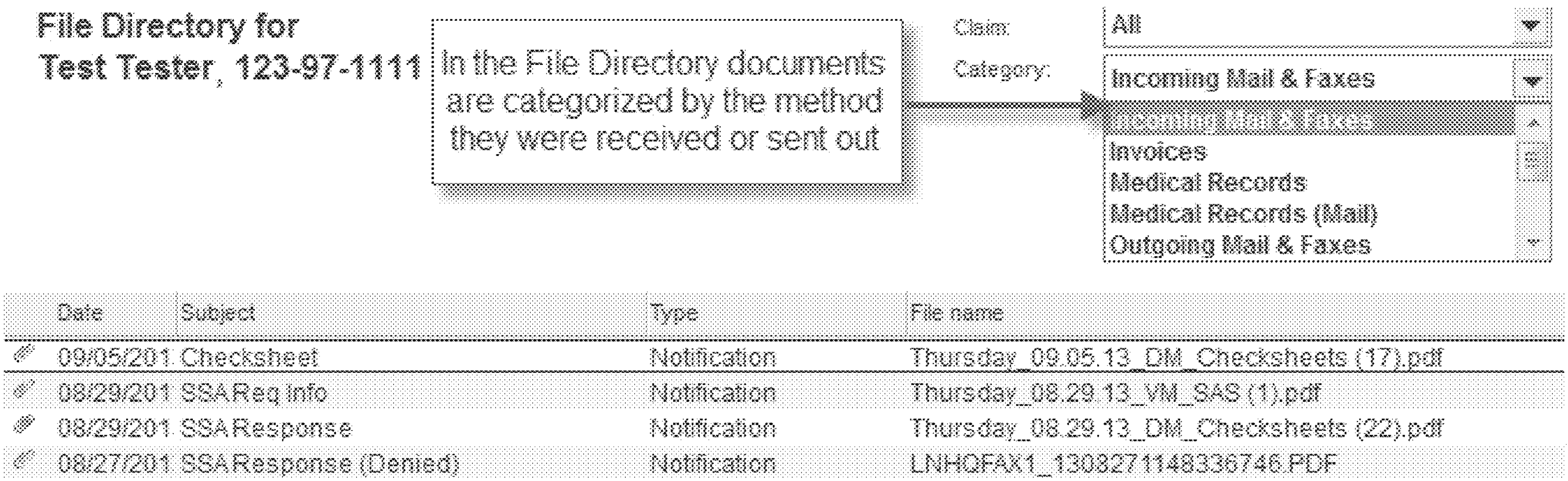


Fig. 199b



These fields allow the user to filter their search based on the criteria selected:

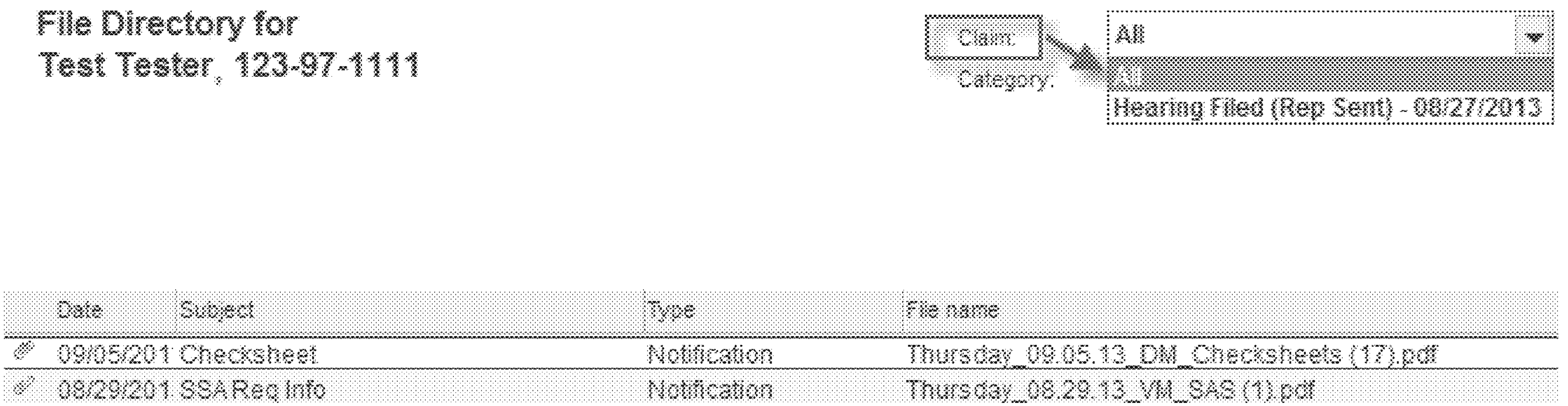
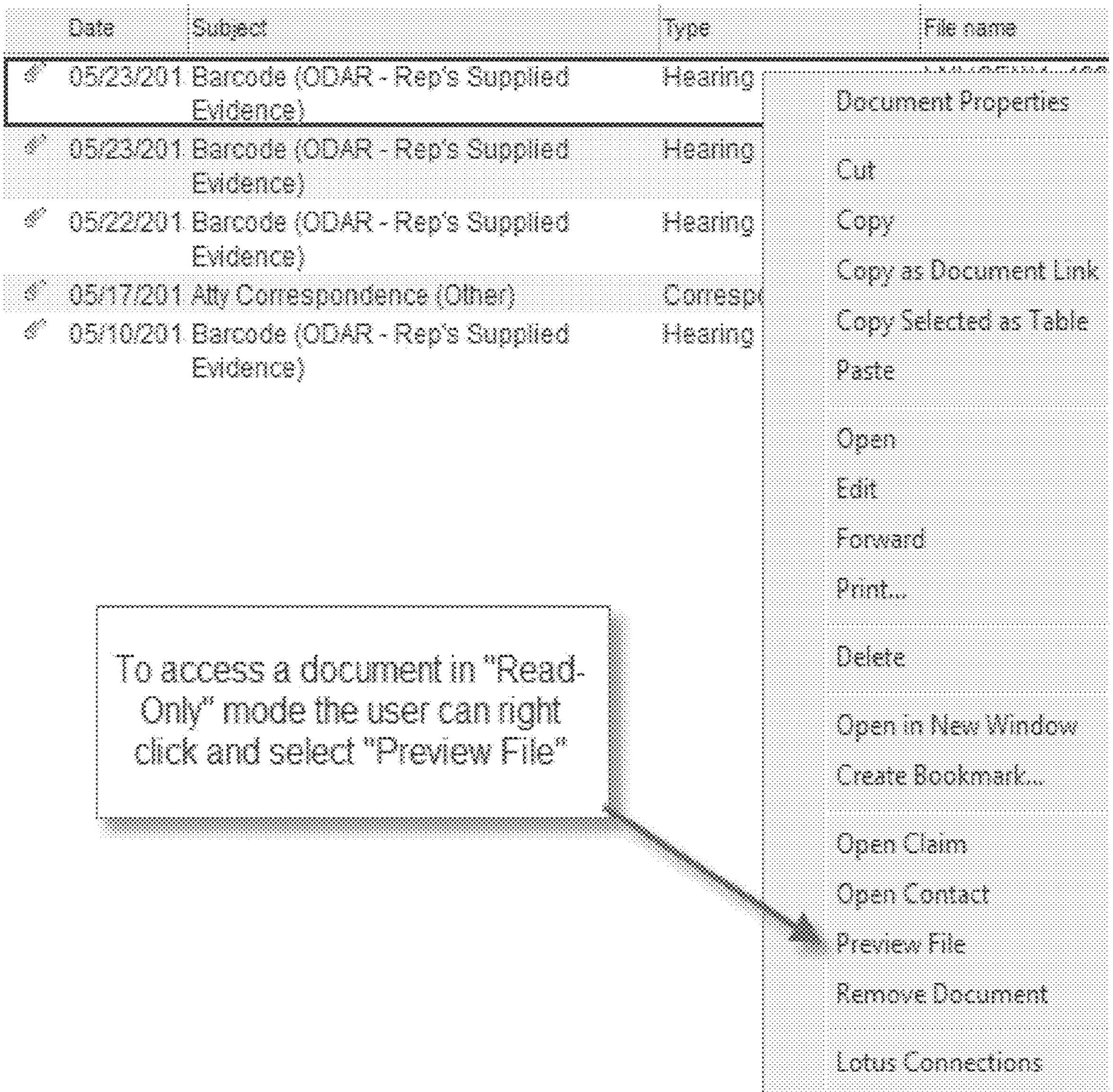


Fig. 200

To view or edit documents in the File Directory:



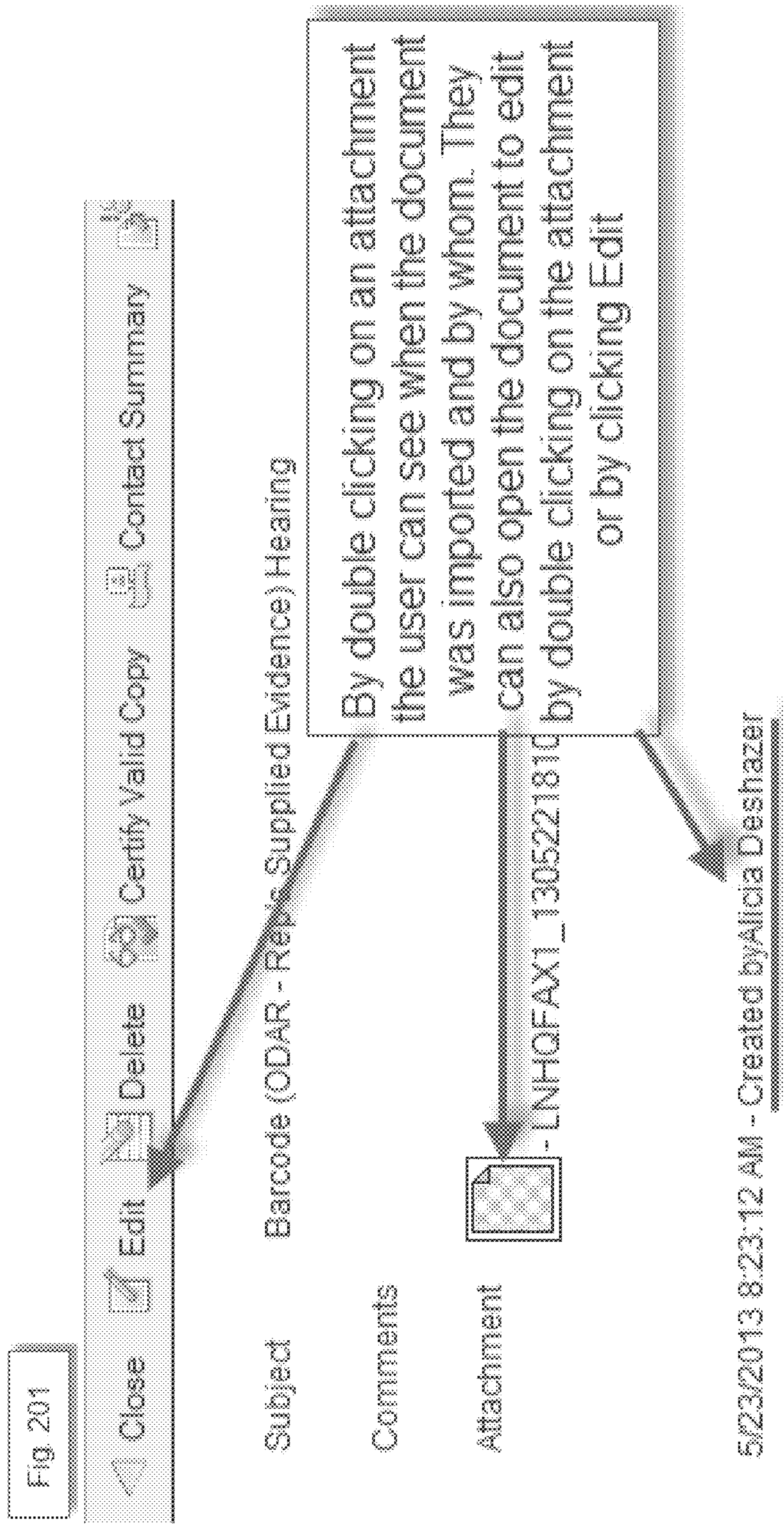
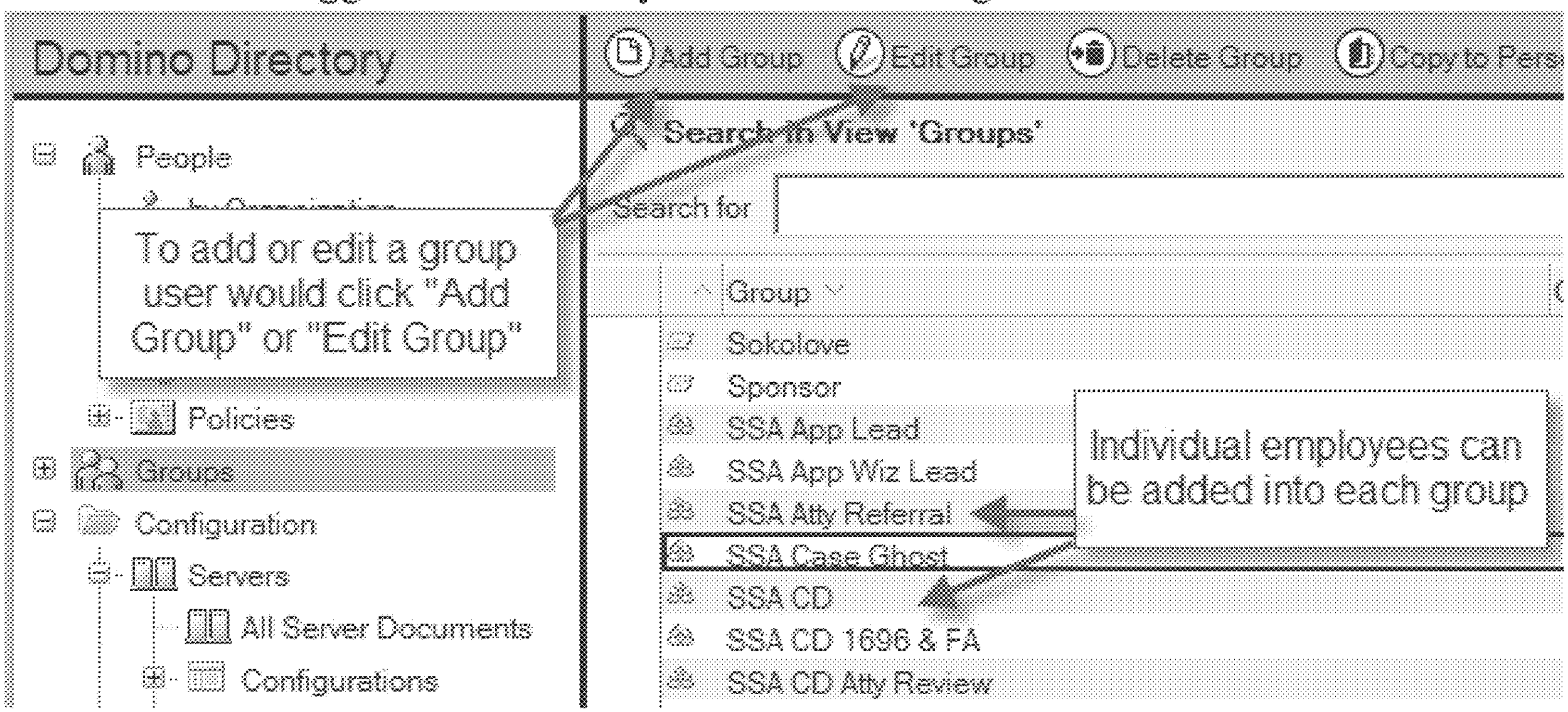


Fig 201
Close
Edit
Delete
Certify Valid Copy
Contact Summary
Subject
Barcode (ODAR - Rep... Supplied Evidence) Hearing
Comments
Attachment
- LNHQFAX1_1305221810
5/23/2013 8:23:12 AM - Created byAlicia Deshazer
By double clicking on an attachment the user can see when the document was imported and by whom. They can also open the document to edit by double clicking on the attachment or by clicking Edit

Fig. 202a

Directory

The Domino Directory allows management to create groups specific to each department. Multiple employees can added into multiple groups. The groups are used to email specific employees at the same time by entering the group name. Workflows are also assigned to correspondence groups - if there are multiple users in one group the workflows that trigger will be evenly distributed among users.



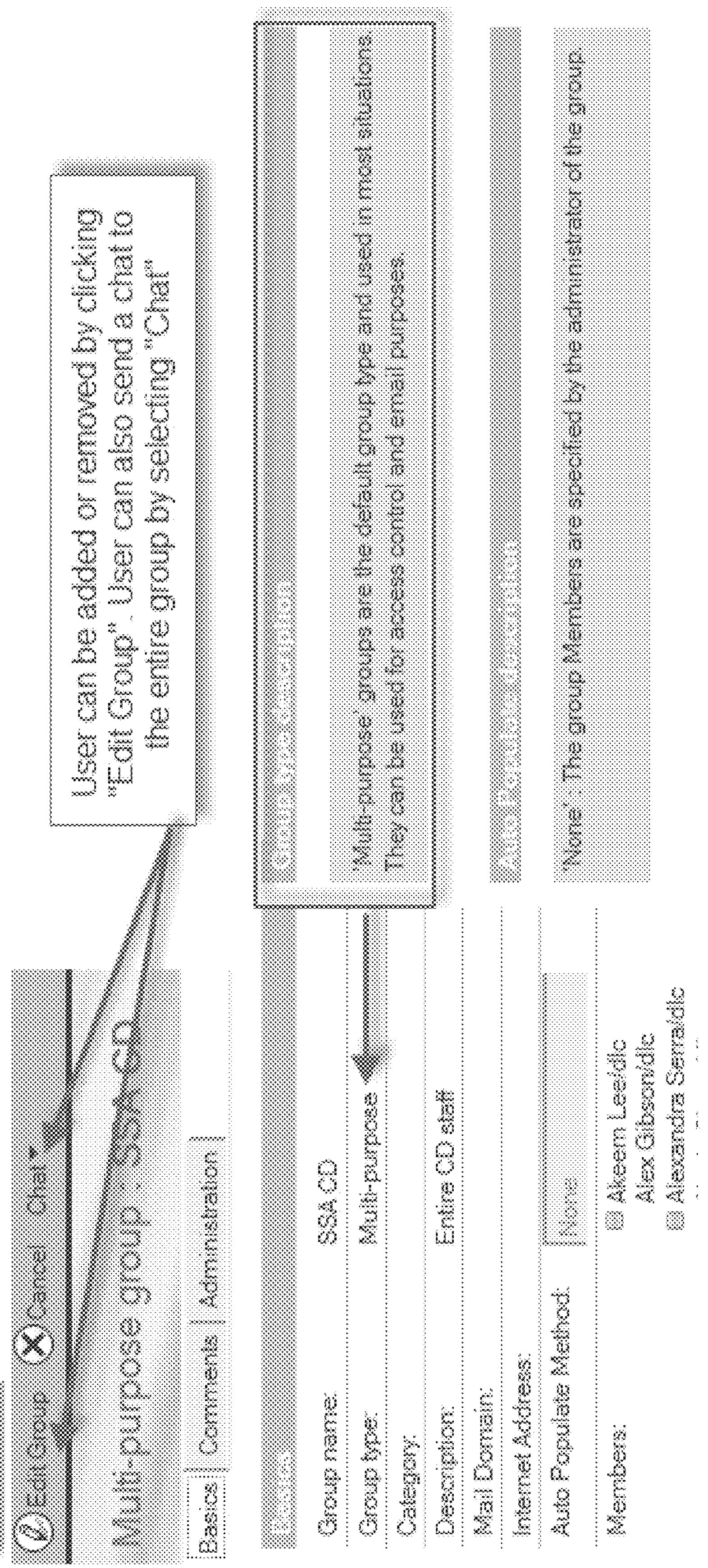

User can be added or removed by clicking "Edit Group". User can also send a chat to the entire group by selecting "Chat"
Edit Group
Cancel
Chat
Multi-purpose group : SSA CD
Basics
Comments
Administration
Group type description
'Multi-purpose' groups are the default group type and used in most situations. They can be used for access control and email purposes.
'None' : The group Members are specified by the administrator of the group.
Group name: SSA CD
Group type: Multi-purpose
Category:
Description: Entire CD staff
Mail Domain:
Internet Address:
Auto Populate Method: None
Members:
Akeem Lee/dlc
Alex Gibson/dlc
Alexandra Serra/dlc

Fig. 202b

Fig. 203a

Bulletin Board IM

In addition to using instant message (IM), the firm uses the IM as a bulletin board to allow users to post helpful information to their entire team. As the day progresses each team member can instantly get updated on events and tips that have progressed throughout the day.

Sametime Chat:

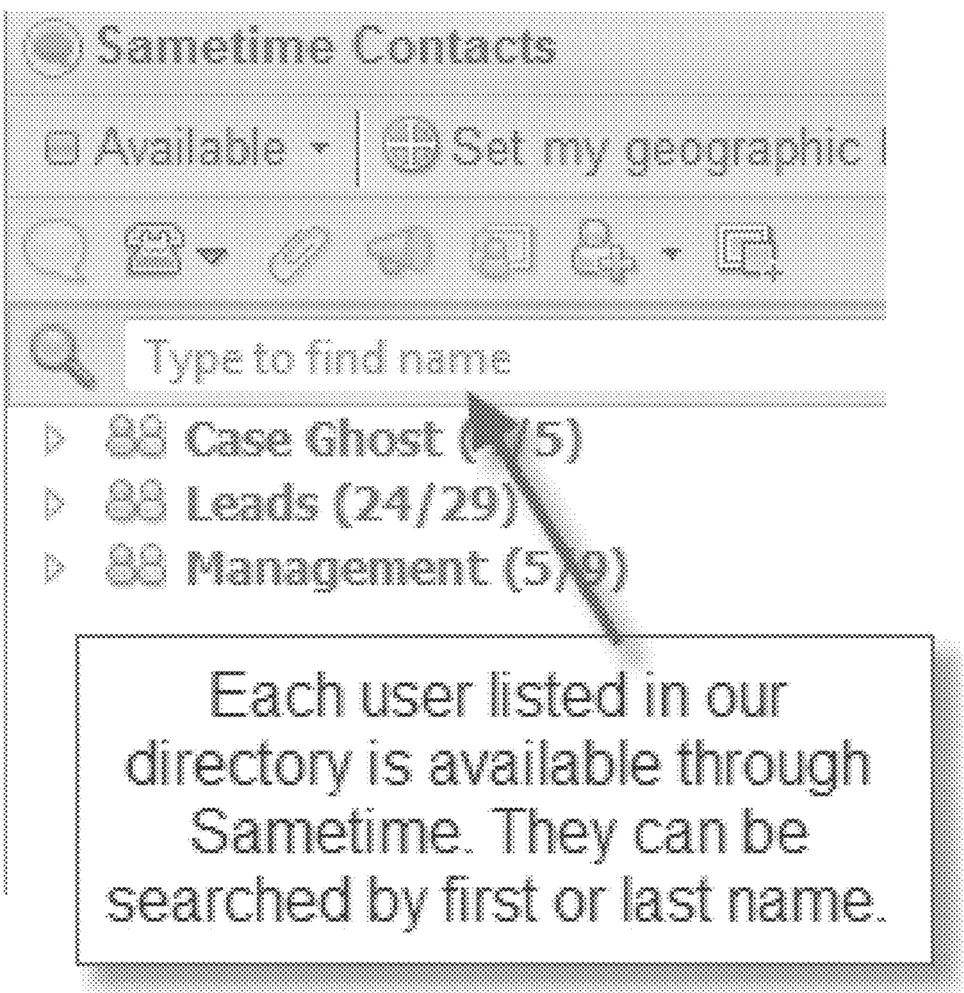


Fig. 203b

Users are able to send a chat to multiple users at one time:

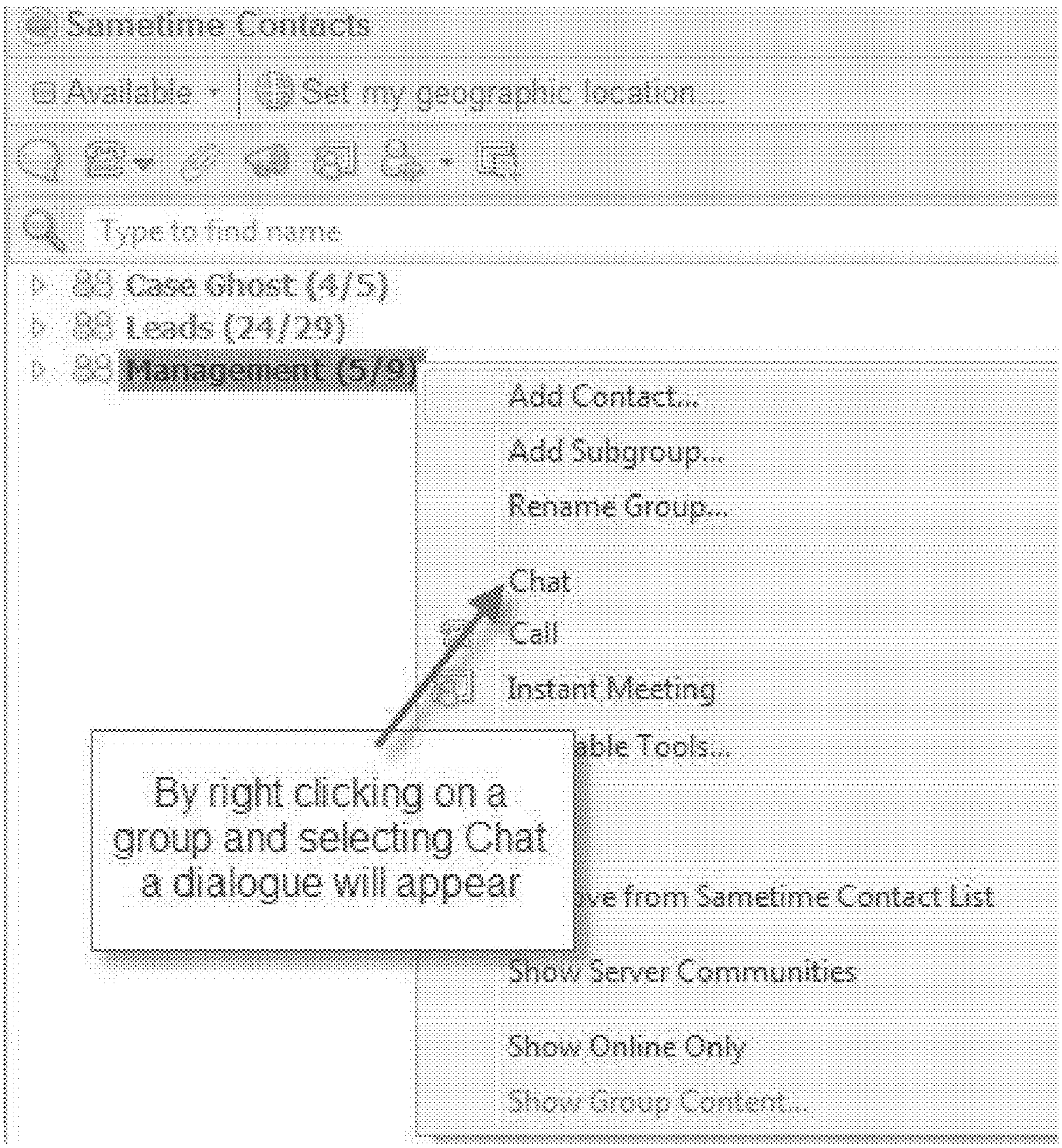


Fig. 204a

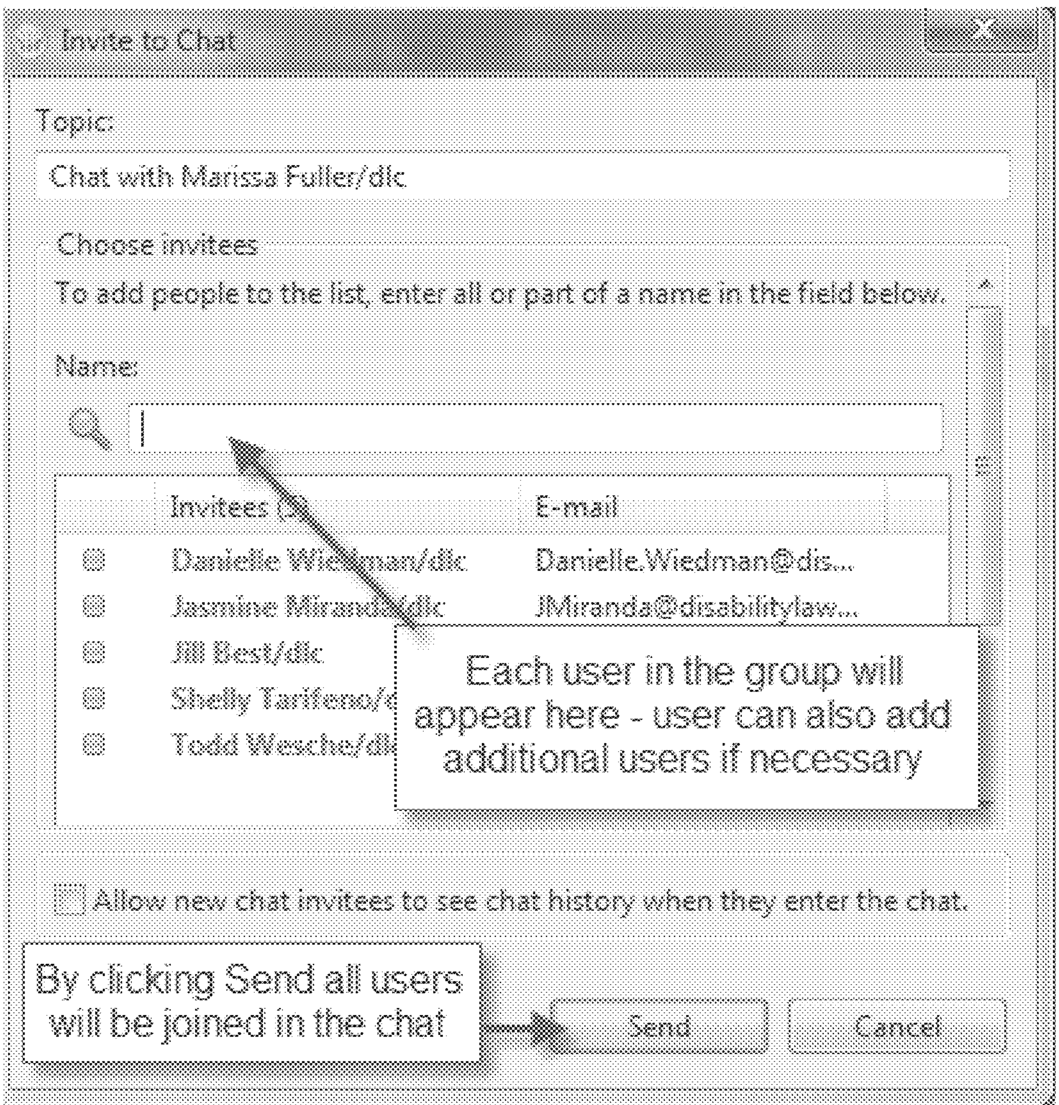

Invite to Chat
Topic:
Chat with Marissa Fuller/dlc
Choose invitees
To add people to the list, enter all or part of a name in the field below.
Name:
Invitees
E-mail
Danielle.Wiedman@dis...
Jasmine Mirand
JMiranda@disabilitylaw...
Jill Best/dlc
Todd Wesche/dl
Each user in the group will appear here - user can also add additional users if necessary
Allow new chat invitees to see chat history when they enter the chat.
By clicking Send all users will be joined in the chat
Send
Cancel

Fig. 204b

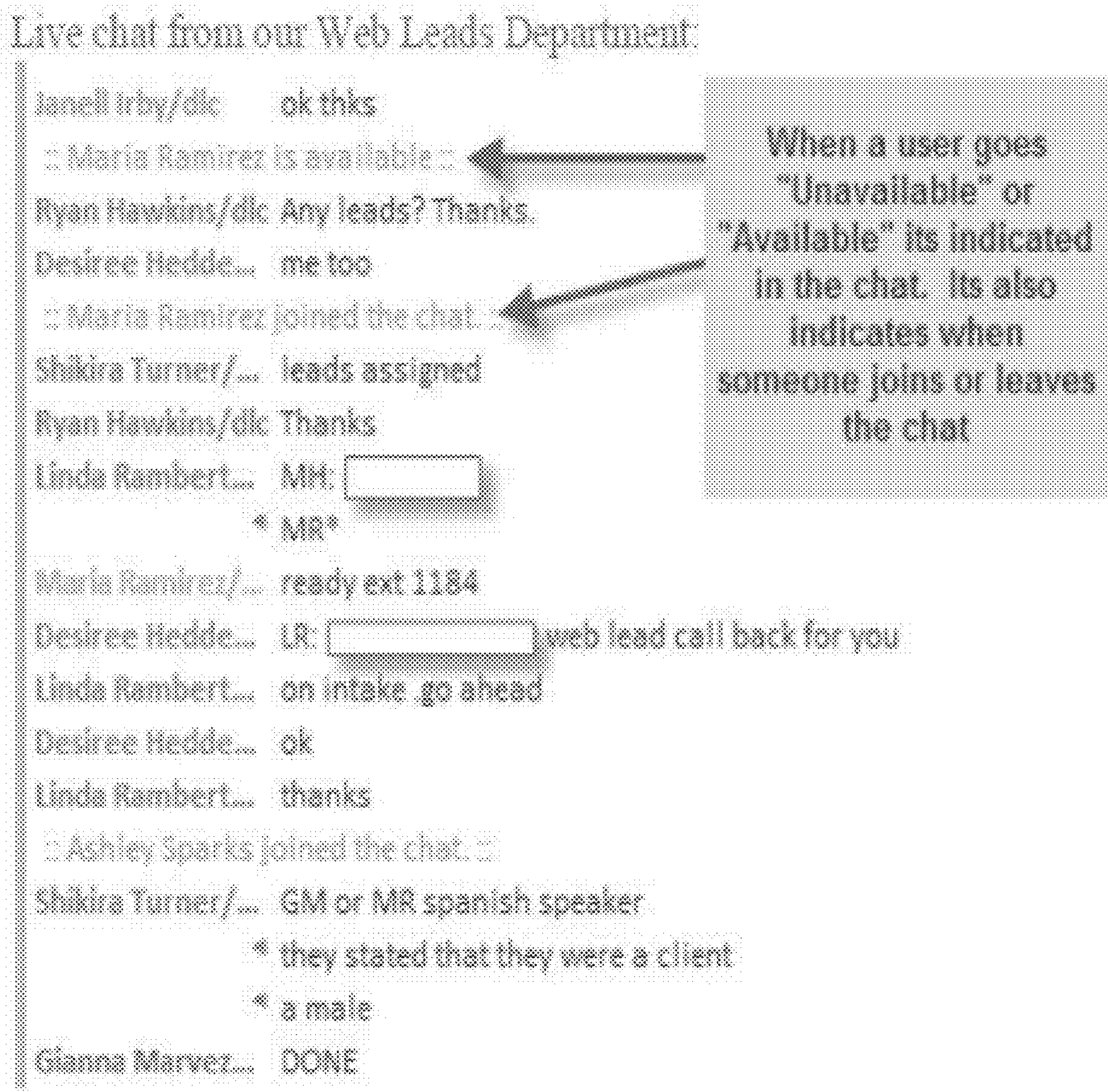

Live chat from our Web Leads Department:
Janell Irby/dlc ok thks
:: Maria Ramirez is available ::
Ryan Hawkins/dlc Any leads? Thanks.
Desiree Hedde... me too
:: Maria Ramirez joined the chat ::
Shikira Turner/... leads assigned
Ryan Hawkins/dlc Thanks
Linda Rambert... MH:
* MR*
Maria Ramirez/... ready ext 1184
Desiree Hedde... LR: web lead call back for you
Linda Rambert... on intake .go ahead
Desiree Hedde... ok
Linda Rambert... thanks
:: Ashley Sparks joined the chat ::
Shikira Turner/... GM or MR spanish speaker
* they stated that they were a client
* a male
Gianna Marvez... DONE
When a user goes "Unavailable" or "Available" its indicated in the chat. Its also indicates when someone joins or leaves the chat

Fig. 205a

LA Field

The LA Field is assigned to the client. The client's LA Field is assigned to teams within the office based on the client's claim status. In addition, each client's corresponding LA Field is imported into the phone system so the client's phone number is routed to the appropriate team.

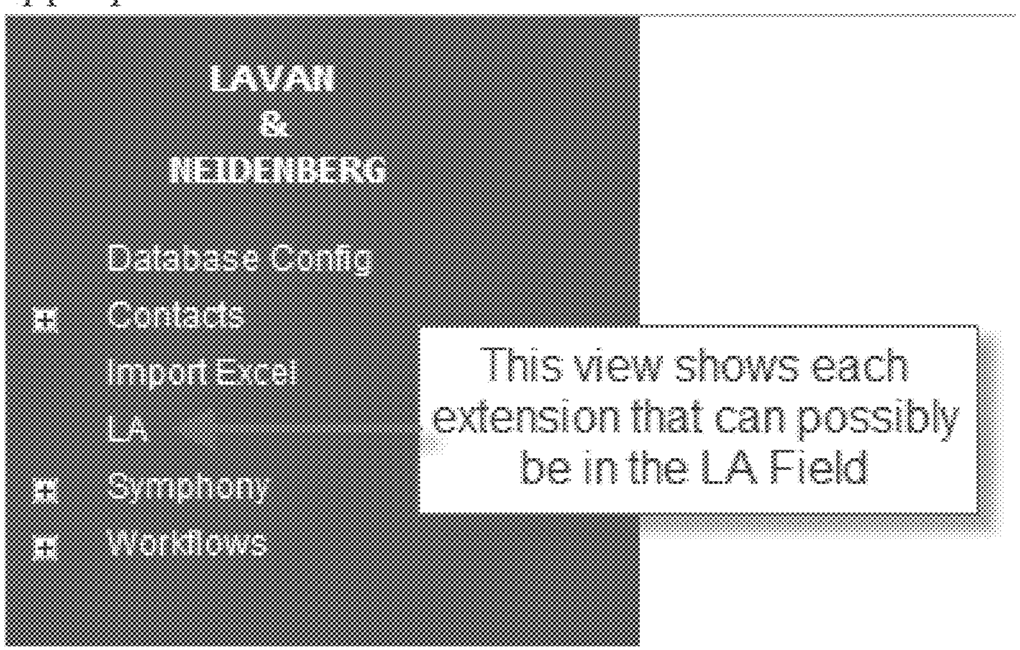
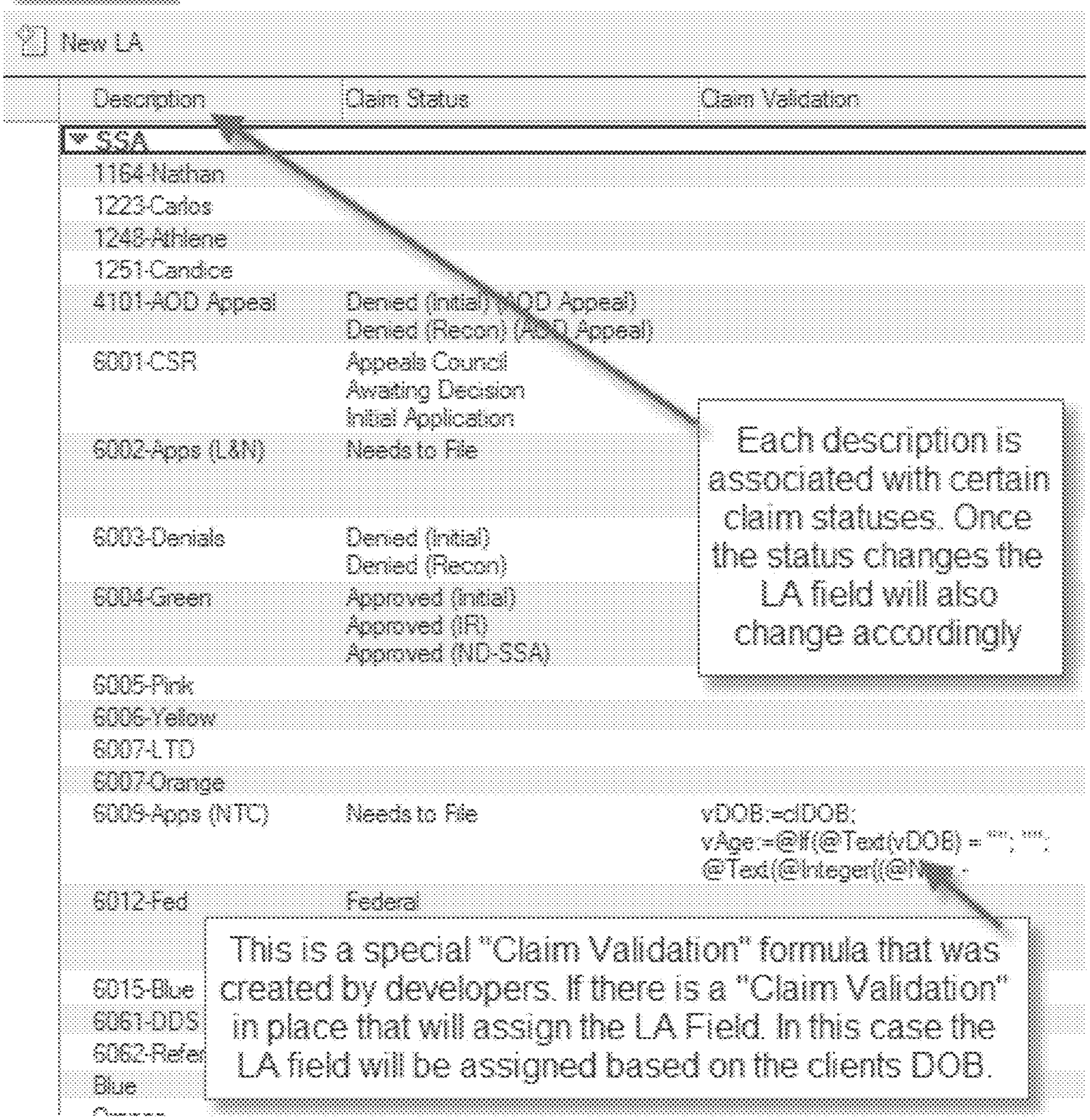


Fig. 205b


New LA
Description
Claim Status
Claim Validation
SSA
1164-Nathan
1223-Carlos
1248-Athlene
1251-Candice
4101-AOD Appeal
Denied (Initial) (AOD Appeal)
Denied (Recon) (AOD Appeal)
6001-CSR
Appeals Council
Awaiting Decision
Initial Application
6002-Apps (L&N)
Needs to File
6003-Denials
Denied (Initial)
Denied (Recon)
6004-Green
Approved (Initial)
Approved (IR)
Approved (ND-SSA)
6005-Pink
6006-Yellow
6007-LTD
6007-Orange
6009-Apps (NTC)
Needs to File
vDOB:=clDOB;
vAge:=@If(@Text(vDOB) = ""; "";
@Text(@Integer((@N
6012-Fed
Federal
6015-Blue
6061-DDS
6062-Refer
Blue
Each description is associated with certain claim statuses. Once the status changes the LA field will also change accordingly
This is a special "Claim Validation" formula that was created by developers. If there is a "Claim Validation" in place that will assign the LA Field. In this case the LA field will be assigned based on the clients DOB.

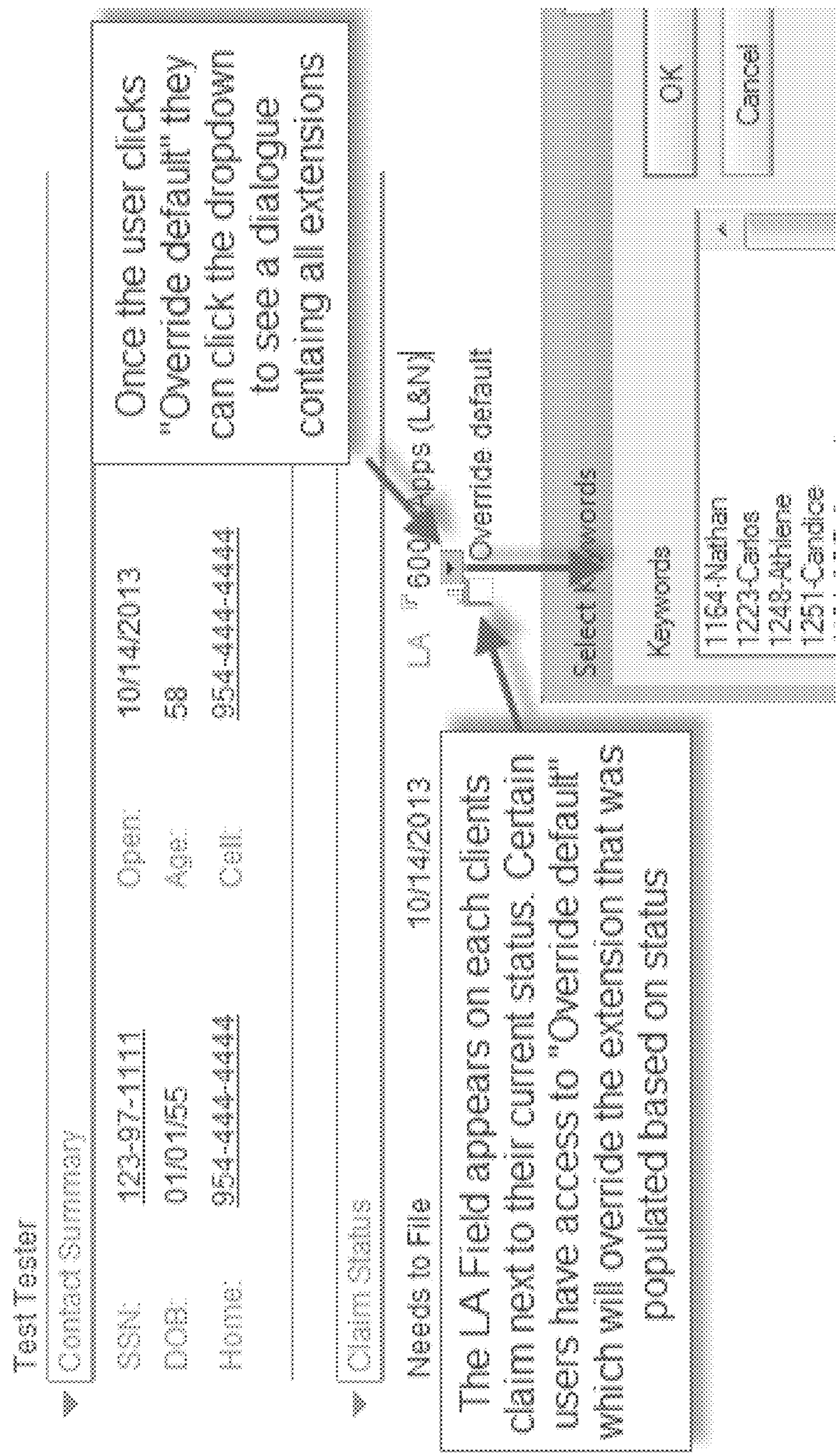

Test Tester
Contact Summary
SSN: 123-97-1111
DOB: 01/01/55
Home: 954-444-4444
Open: 10/14/2013
Age: 58
Cell: 954-444-4444
Claim Status
Needs to File
10/14/2013
LA
Override default
Keywords
1164-Nathan
1223-Carlos
1248-Athlene
1251-Candice
OK
Cancel
Once the user clicks "Override default" they can click the dropdown to see a dialogue containg all extensions
The LA Field appears on each clients claim next to their current status. Certain users have access to "Override default" which will override the extension that was populated based on status

Fig 206

Fig. 207a

Symphony Templates and Bookmarks

To be as time efficient as possible, each department uses template letters that automatically generate clients information using bookmarks or tokens. We currently have 503 templates and 1,240 bookmarks created in the system.

These views show all templates and bookmarks for each department in the office:

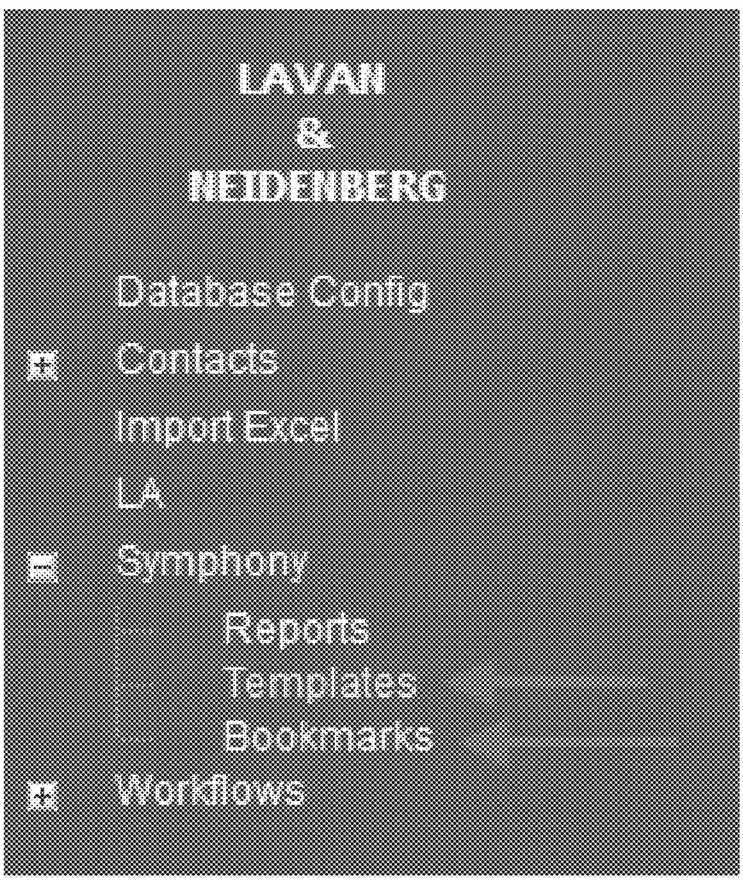
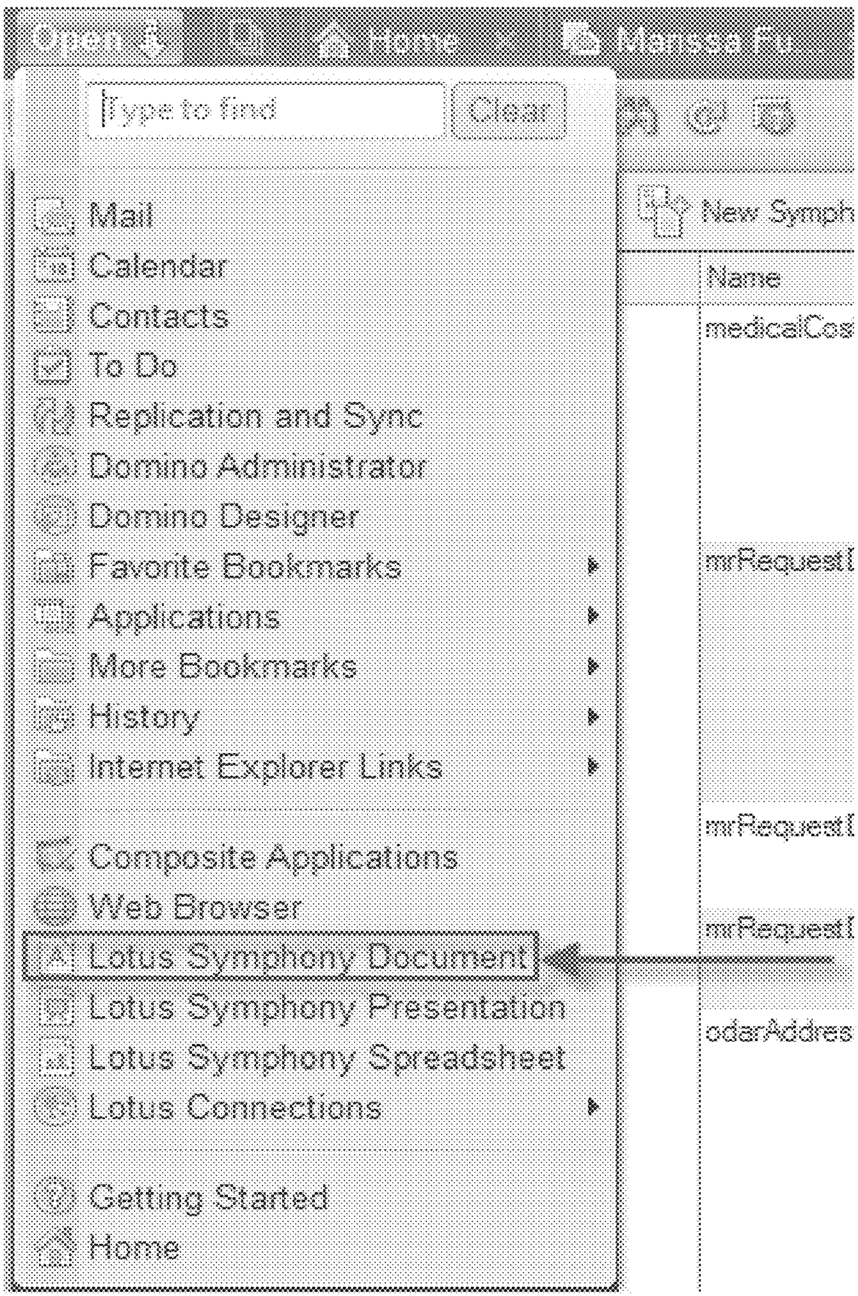


Fig. 207b

Each department creates their templates and they are added into the database by following the steps below:

To create the template the user will open a blank Lotus Symphony Document -



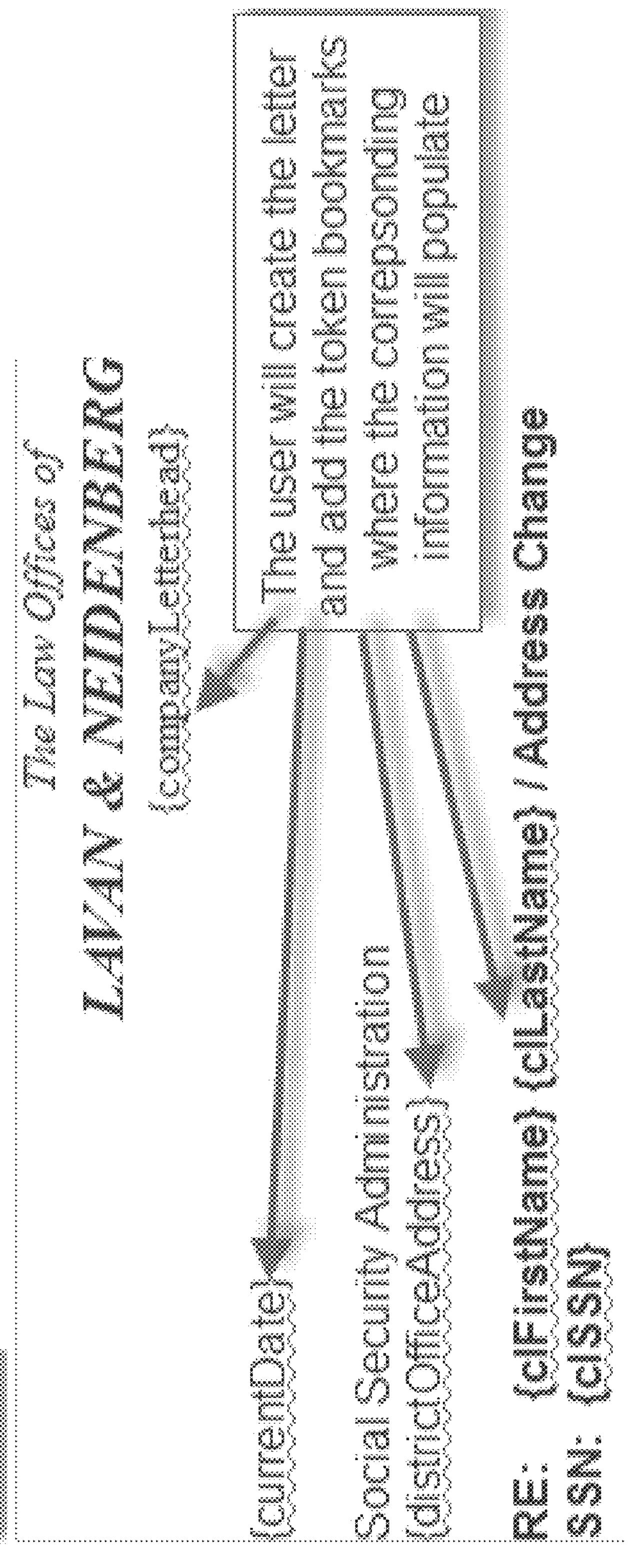
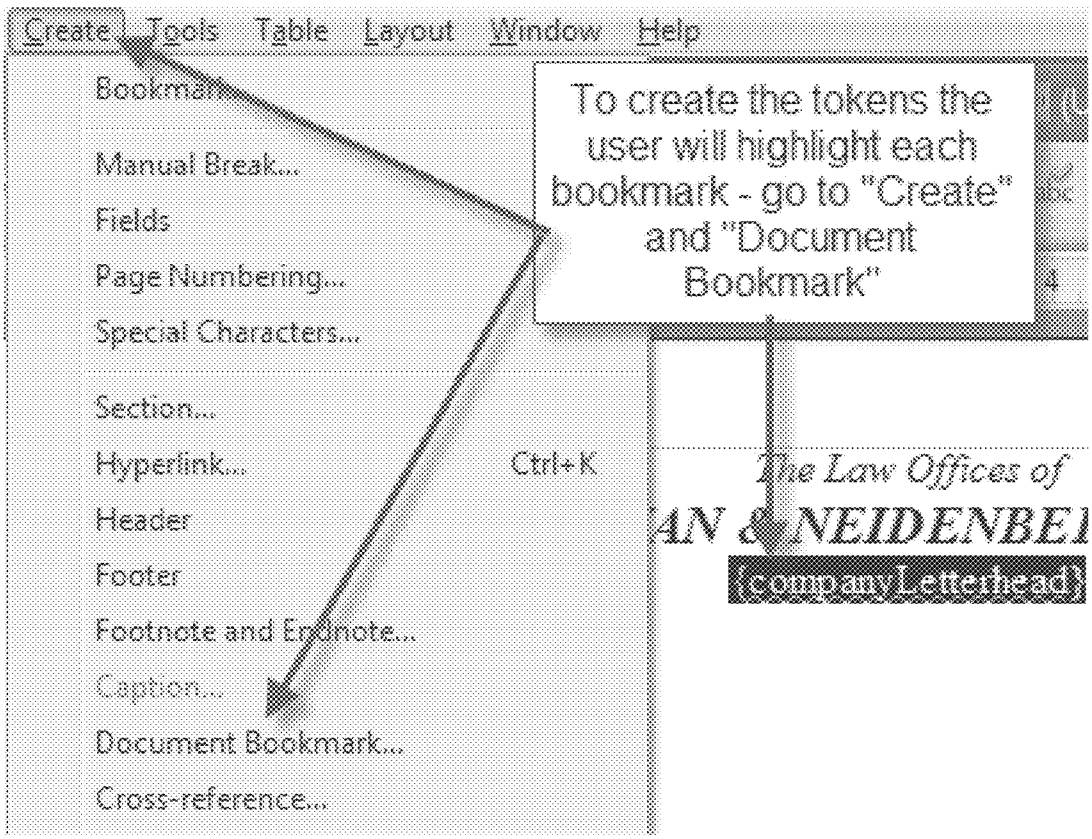

The Law Offices of
LAVAN & NEIDENBERG
{companyLetterhead}
The user will create the letter and add the token bookmarks where the correpsonding information will populate
{currentDate}
Social Security Administration
{districtOfficeAddress}
RE: {clFirstName} {clLastName} / Address Change
SSN: {clSSN}

Fig. 208a

Fig. 208b



Once the user clicks on "Document Bookmark" a dialogue will appear for them to enter the bookmark name -

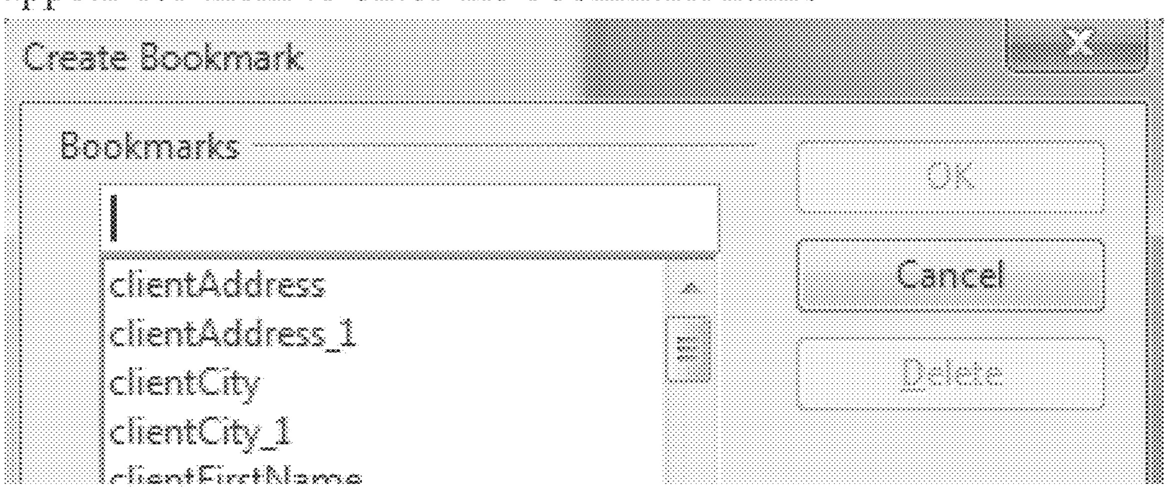


Fig. 209a

Once the letter is created and all of the bookmarks are entered the user will create the Template:

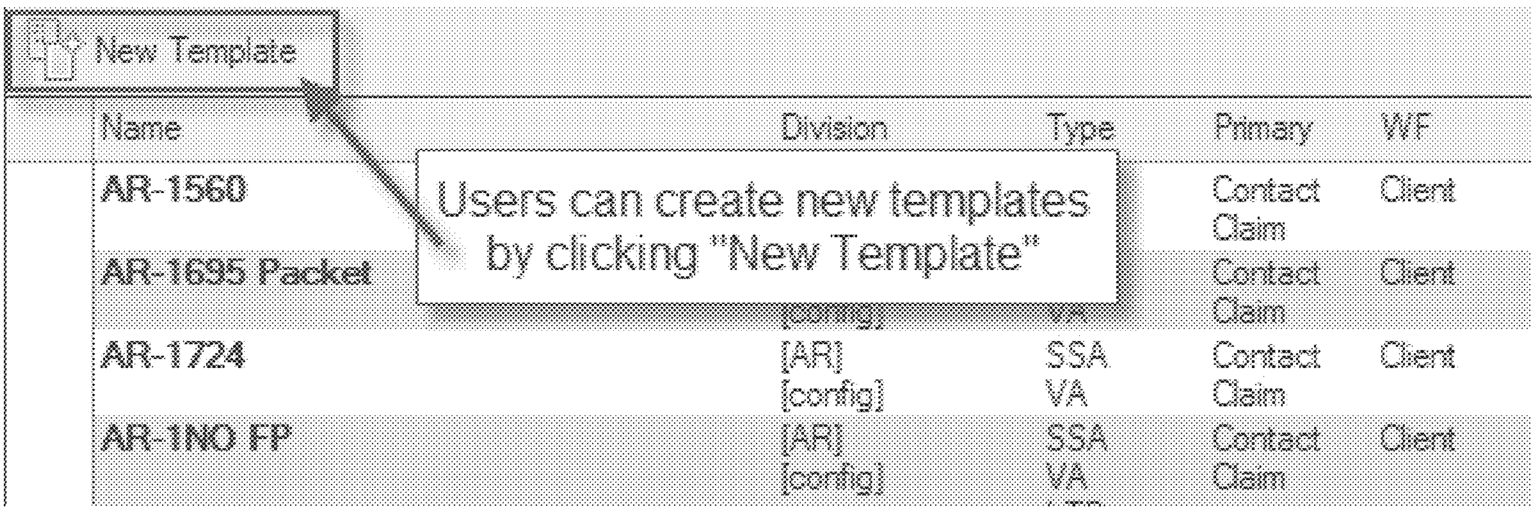
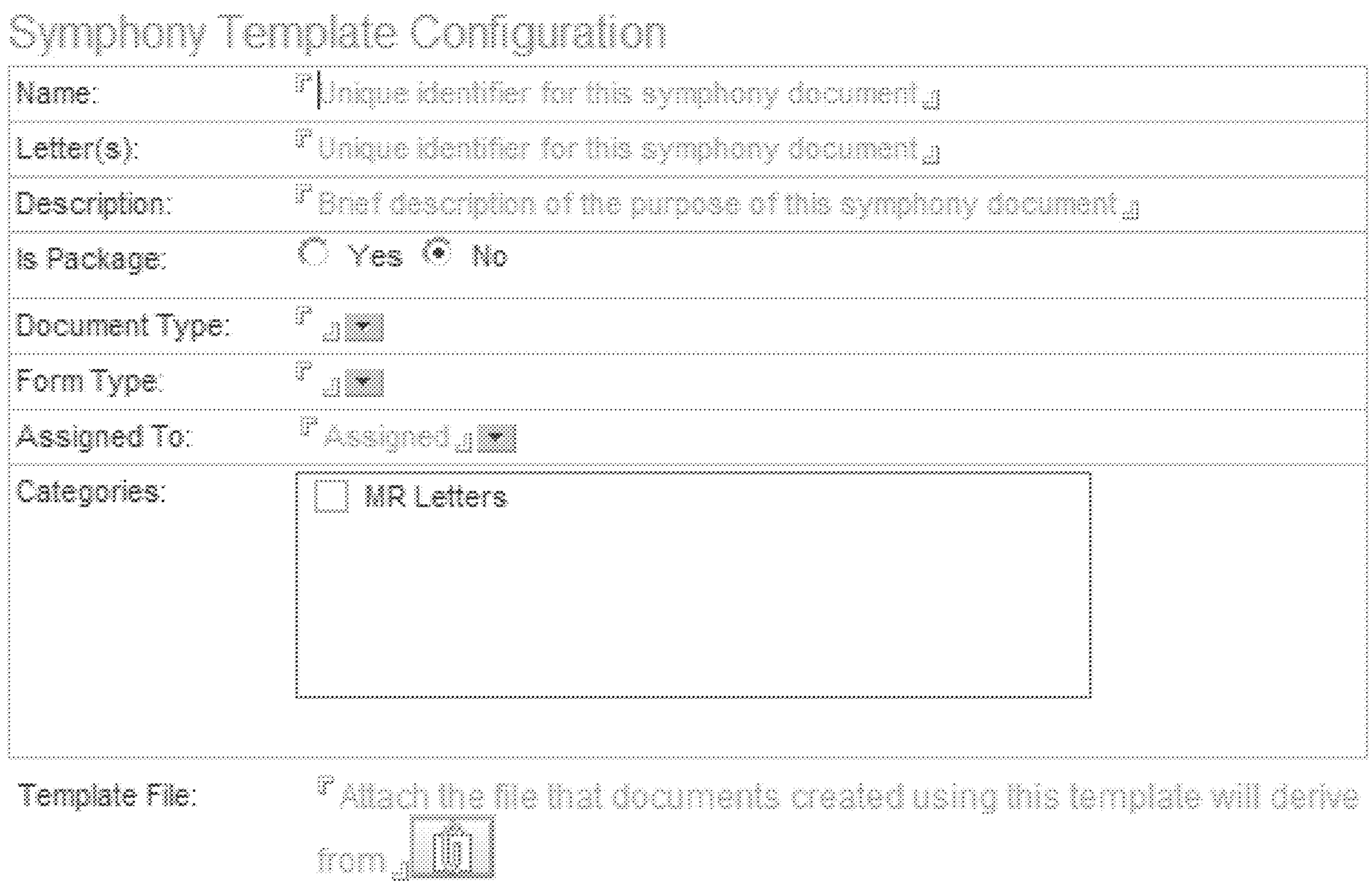


Fig. 209b

This dialogue will appear:



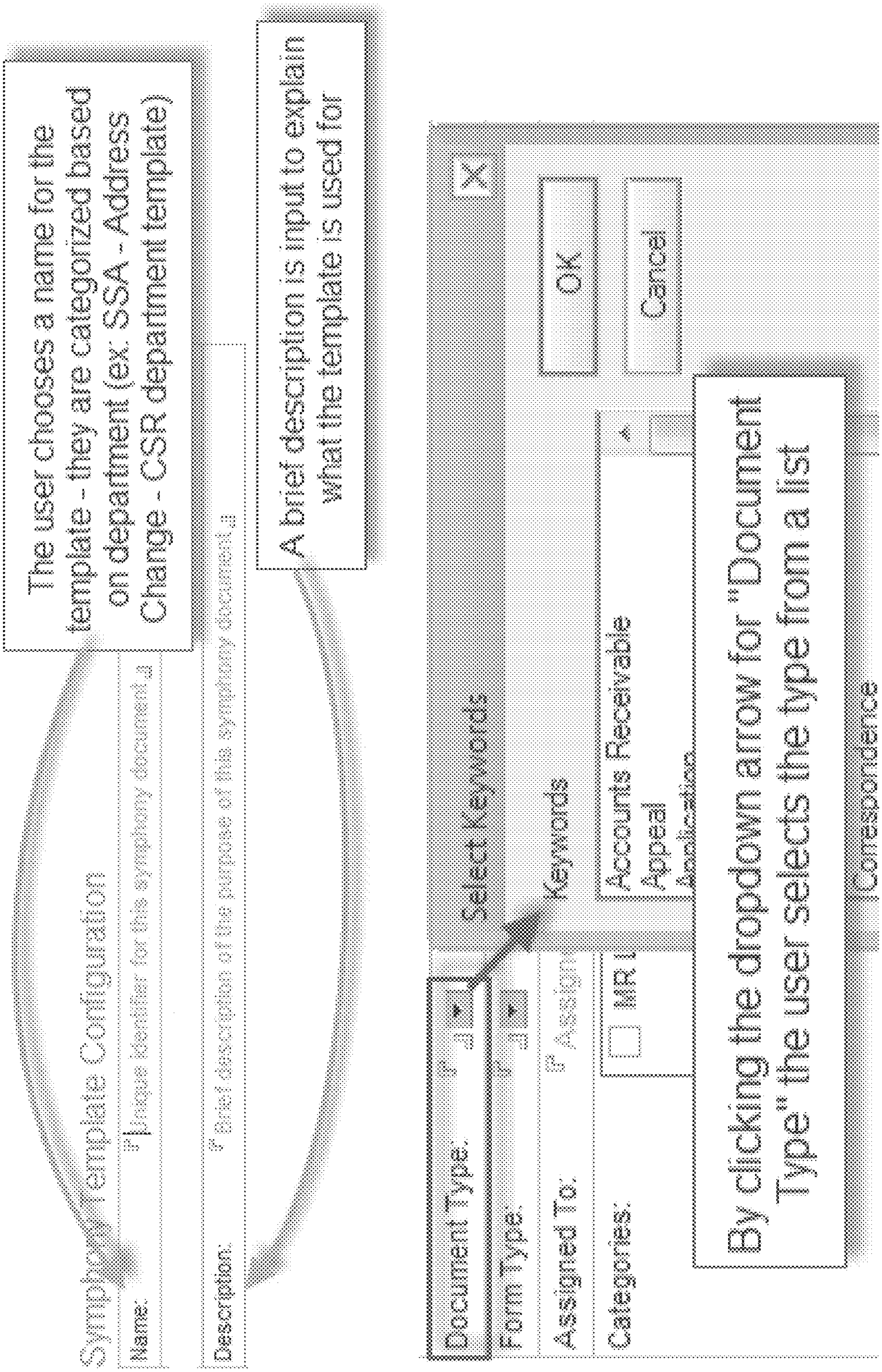

Symphony Template Configuration
Name:
Unique Identifier for this symphony document
Description:
Brief description of the purpose of this symphony document
The user chooses a name for the template - they are categorized based on department (ex: SSA - Address Change - CSR department template)
A brief description is input to explain what the template is used for
Select Keywords
Keywords
Accounts Receivable
Appeal
Correspondence
OK
Cancel
Document Type:
Form Type:
Assigned To:
Categories:
By clicking the dropdown arrow for "Document Type" the user selects the type from a list

Fig. 210a

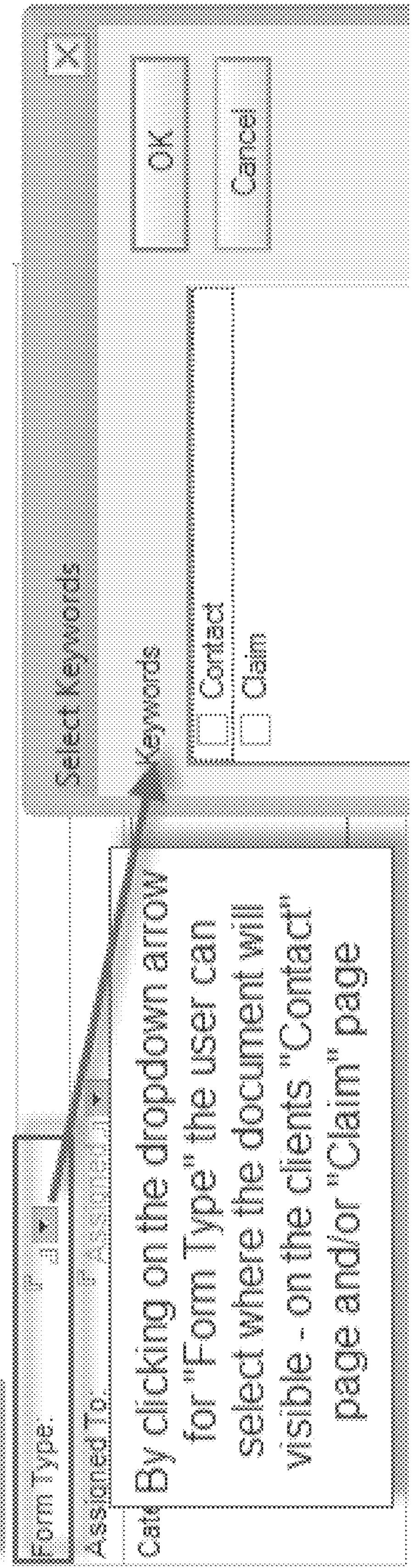

Select Keywords
OK
Cancel
Keywords
Contact
Claim
Form Type:
Assigned To:
By clicking on the dropdown arrow for "Form Type" the user can select where the document will visible - on the clients "Contact" page and/or "Claim" page

Fig. 210b

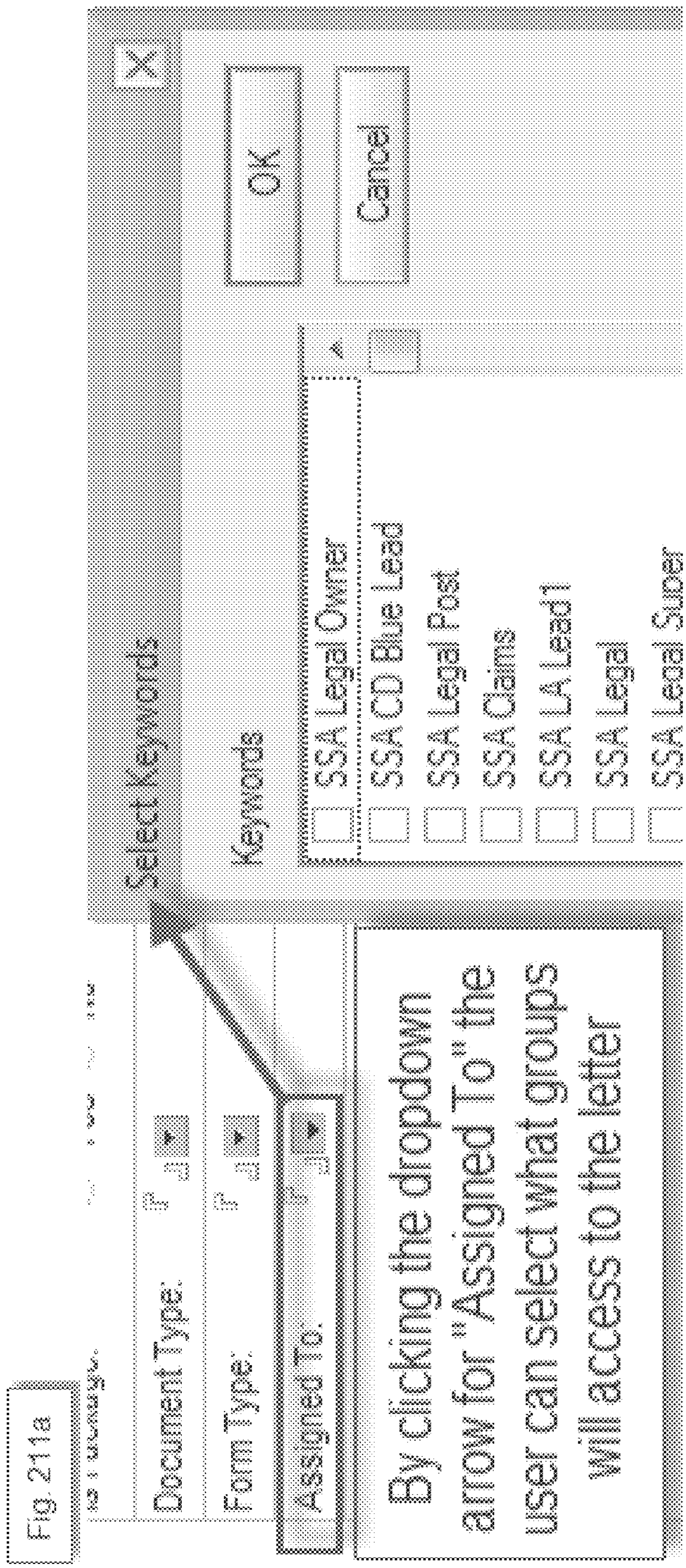

Document Type:
Form Type:
Assigned To:
By clicking the dropdown arrow for "Assigned To" the user can select what groups will access to the letter
Select Keywords
Keywords
SSA Legal Owner
SSA CD Blue Lead
SSA Legal Post
SSA Claims
SSA LA Lead1
SSA Legal
SSA Legal Super
OK
Cancel

Fig 211a

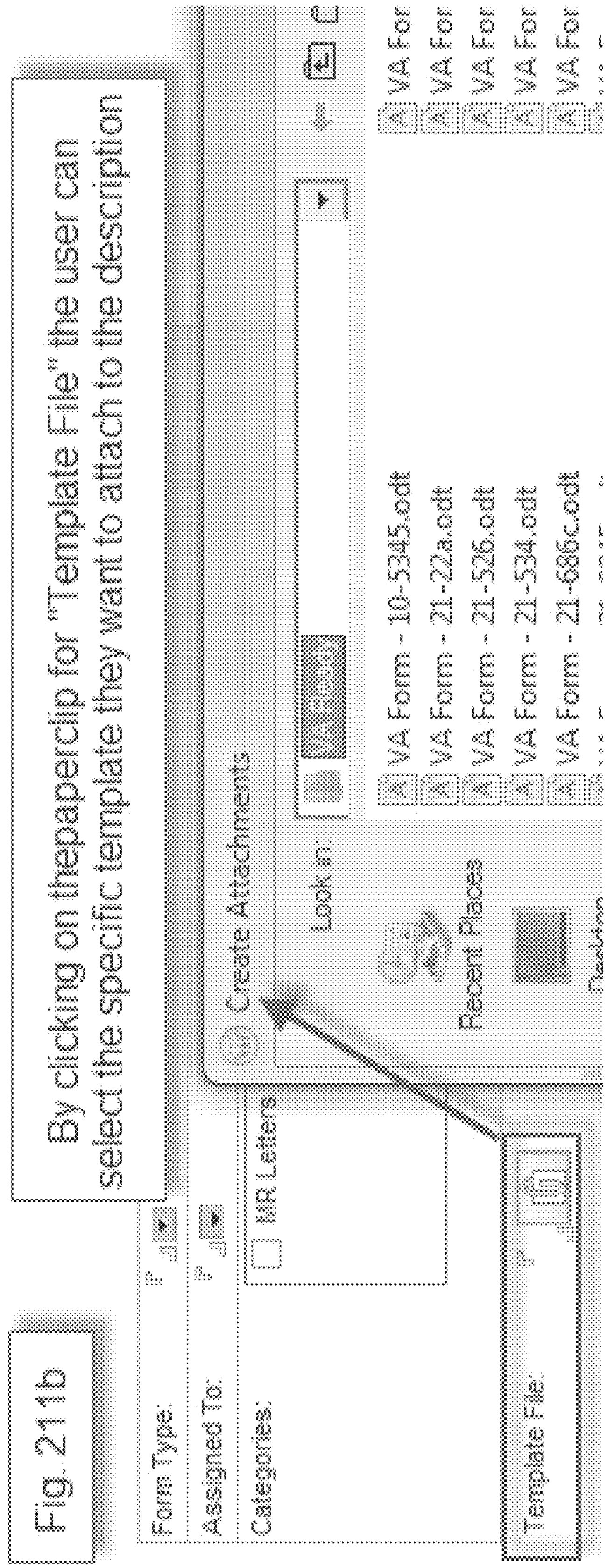

By clicking on thepaperclip for "Template File" the user can select the specific template they want to attach to the description
Form Type:
Assigned To:
Categories:
MR Letters
Template File:
Create Attachments
Look in:
Recent Places
VA Form - 10-5345.odt
VA Form - 21-22a.odt
VA Form - 21-526.odt
VA Form - 21-534.odt
VA Form - 21-686c.odt

Fig. 211b

Fig 211c

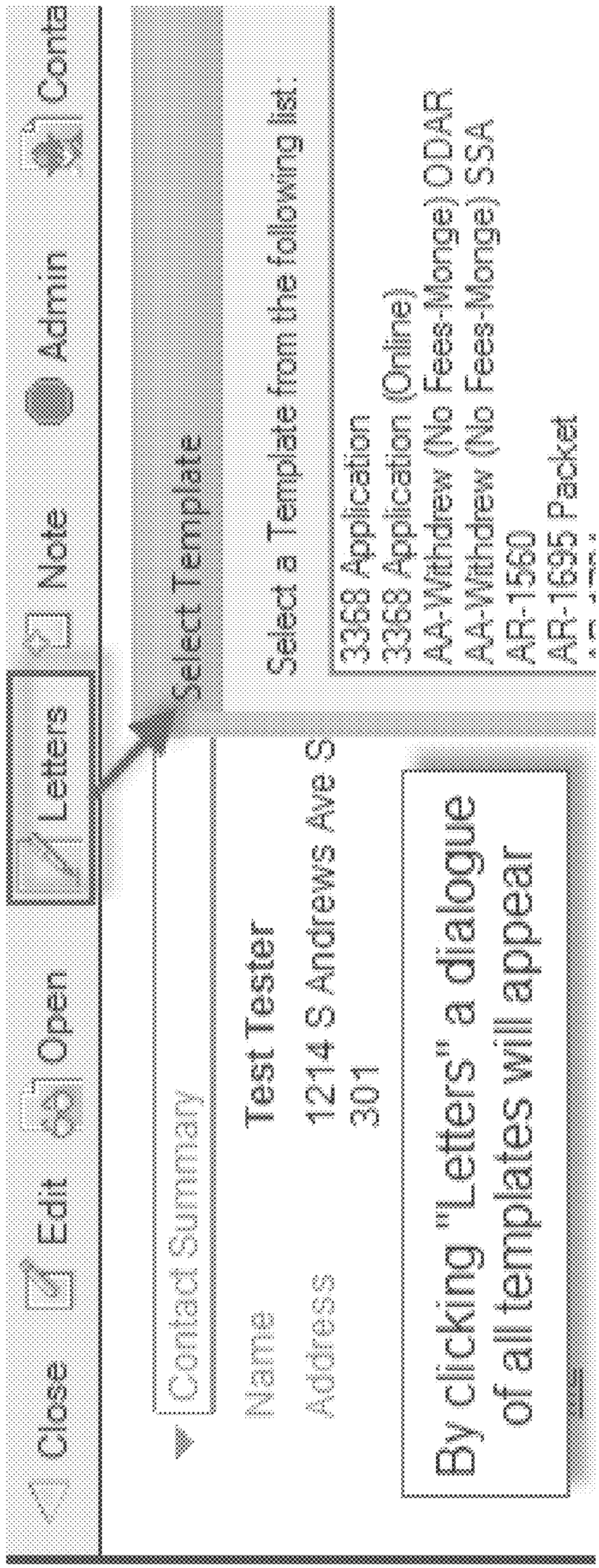

Close
Edit
Open
Letters
Note
Admin
Contact Summary
Name
Test Tester
Address
1214 S Andrews Ave S
301
By clicking "LetterS" a dialogue of all templates will appear
Select Template
Select a Template from the following list:
3368 Application
3368 Application (Online)
AA-Withdrew (No Fees-Monge) ODAR
AA-Withdrew (No Fees-Monge) SSA
AR-1560
AR-1695 Packet

Fig. 212a

The user will select a letter and click OK - the letter will open and populate the tokens:

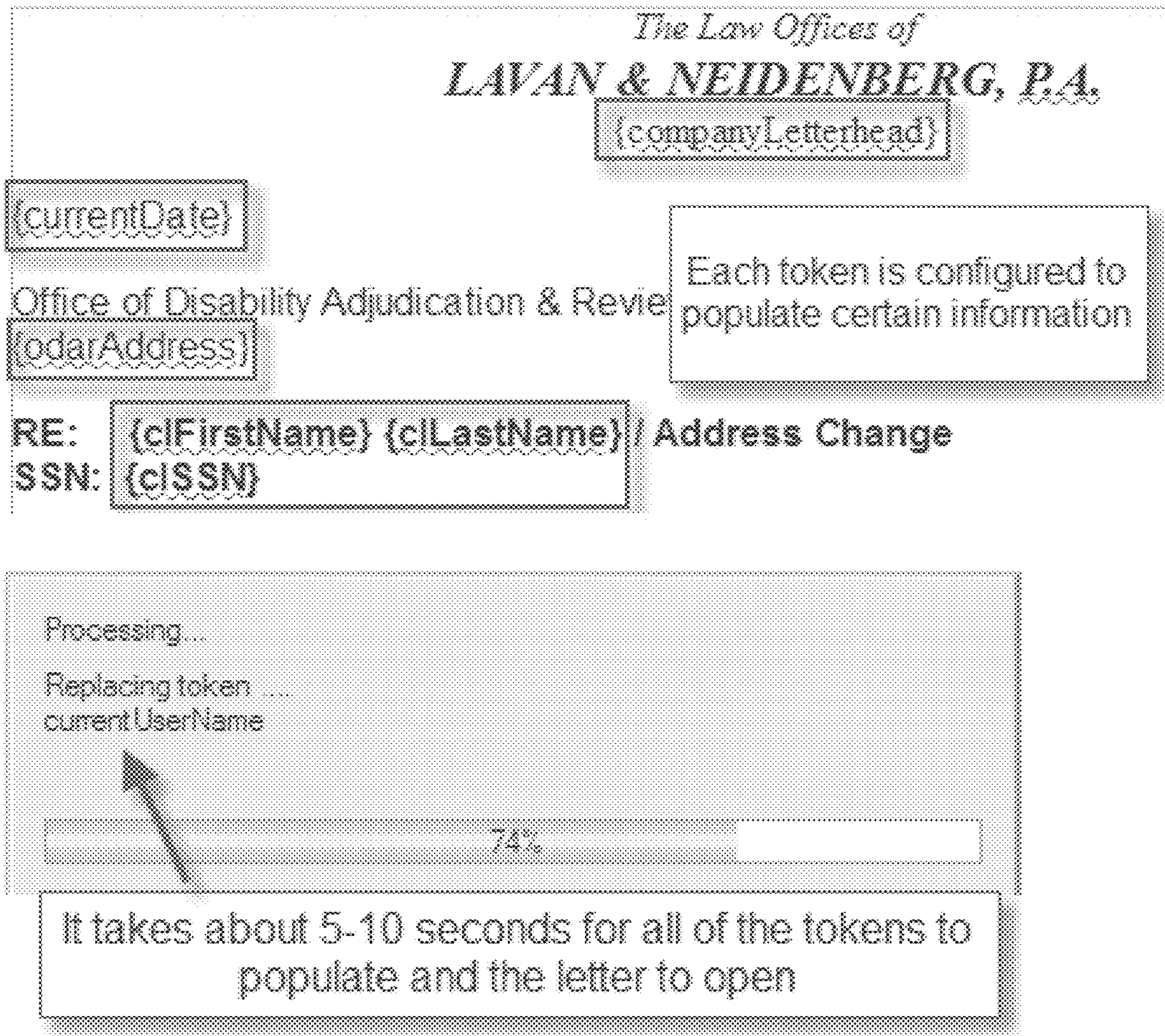


Fig. 212b

The Law Offices of

LAVAN & NEIDENBERG, P.A.

P.O. Box 350038
Fort Lauderdale, FL 33335-0038
Phone: (888) 234-2341; (954) 523-3870
Fax: (954) 523-3871

October 28, 2013

Office of Disability Adjudication & Review
500 E. Broward Blvd, 10th Flr, Ste 1000
Ft. Lauderdale, FL 33394

RE: Test Tester / Address Change
SSN: 123-97-1111

Fig. 213

Mail Descriptions

Hundreds of Mail Descriptions have been added to EZ Claim for incoming and outgoing correspondence. Many of the Mail Descriptions include workflows as the start action field, kicking off the workflow as the document is imported. In addition, mail descriptions are used in the Claim Progression to update claim statuses automatically.

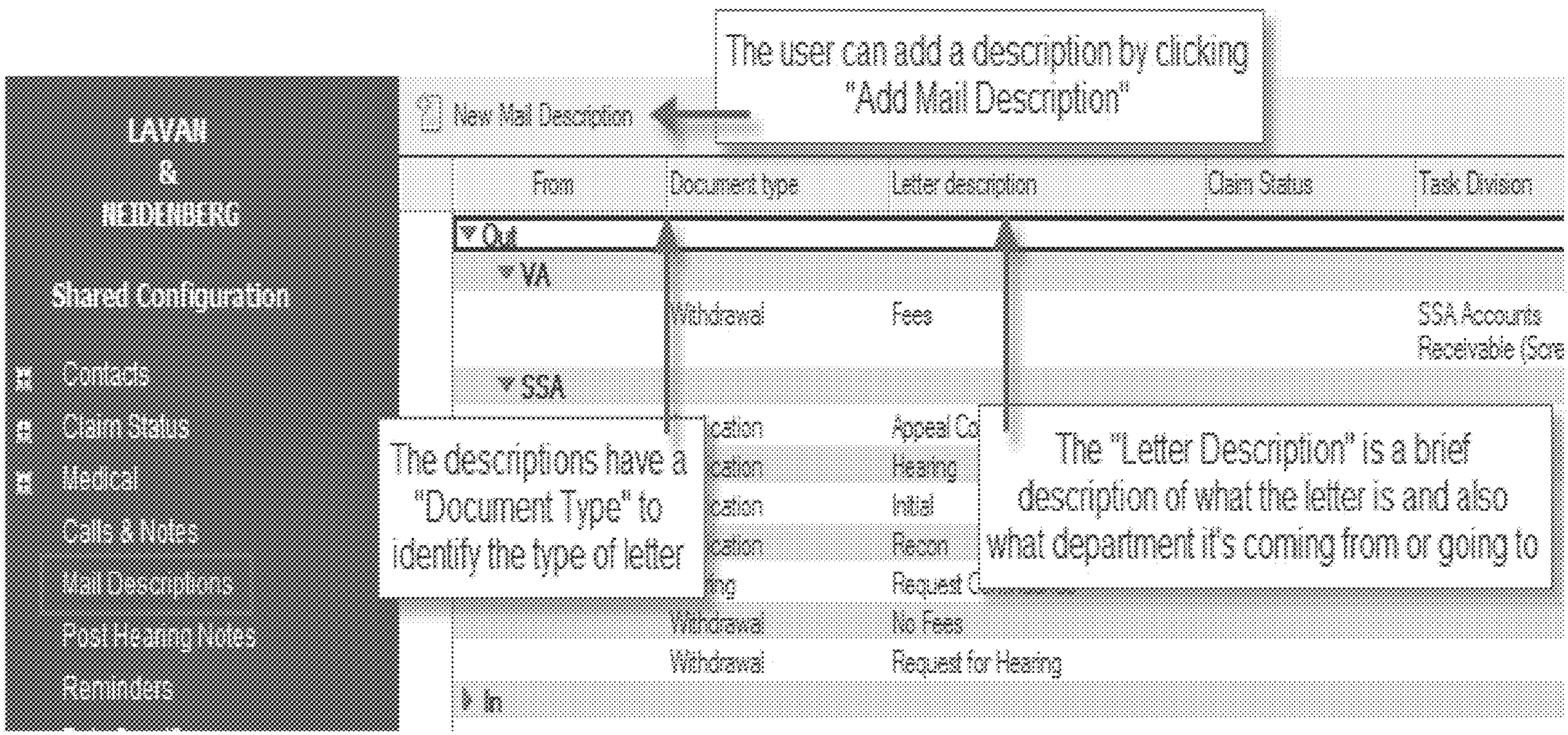


Fig. 214a

By clicking "Add Mail Description" the following dialogue appears

Fig. 214b

The following print screens explain the dialogue in 4 sections:

Section 1:

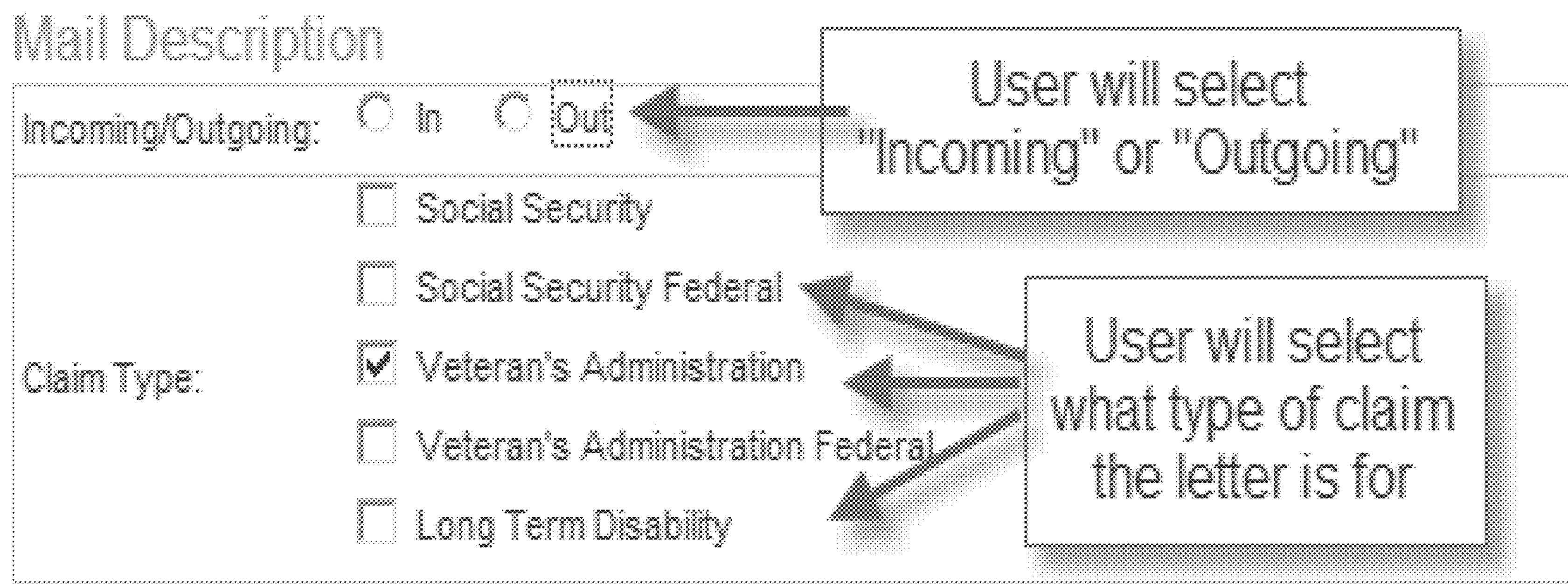


Fig. 215a

Section 2:

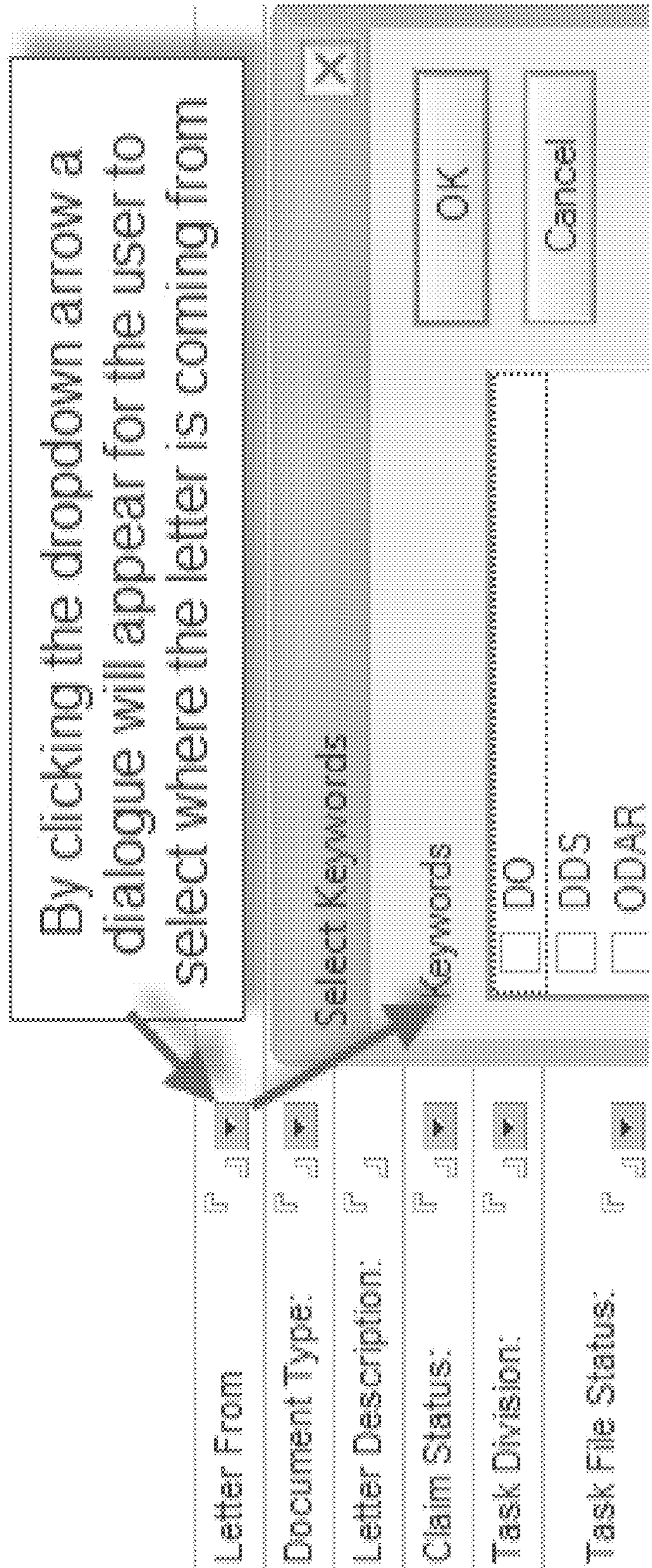


Fig 215b

Section 3:

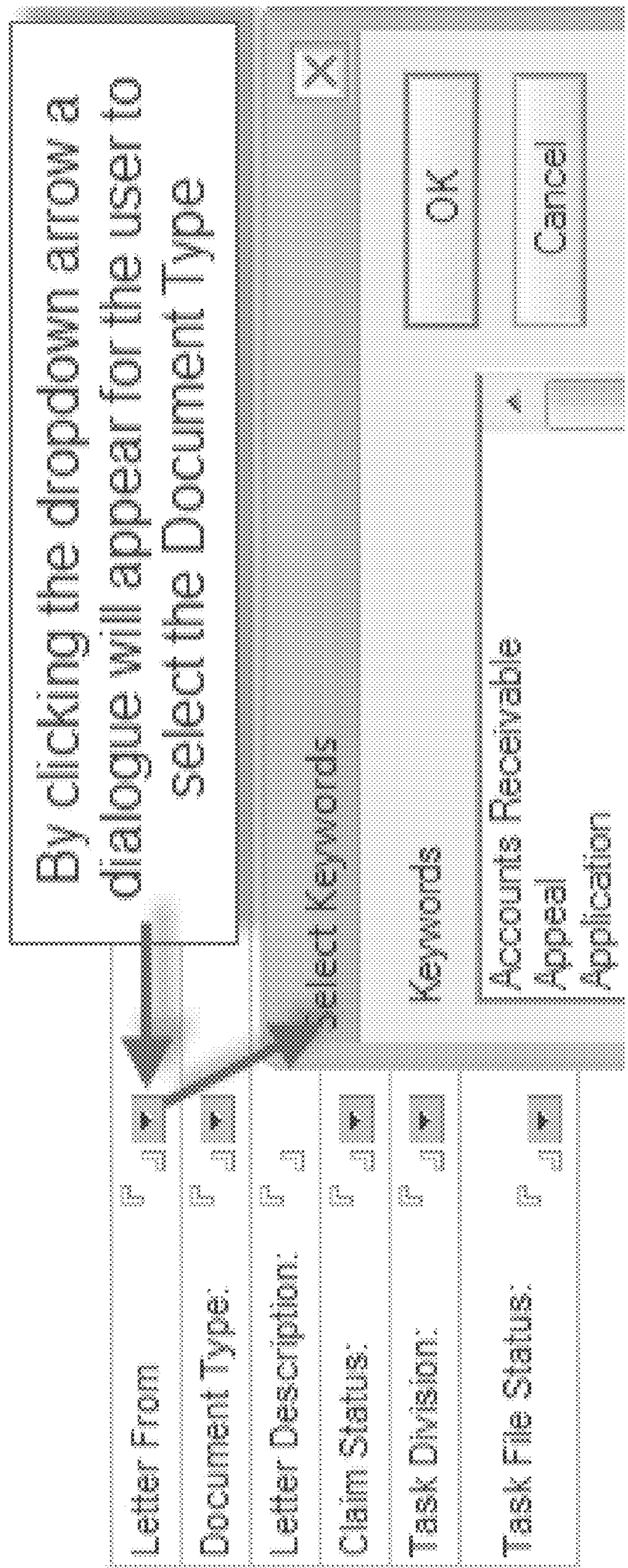
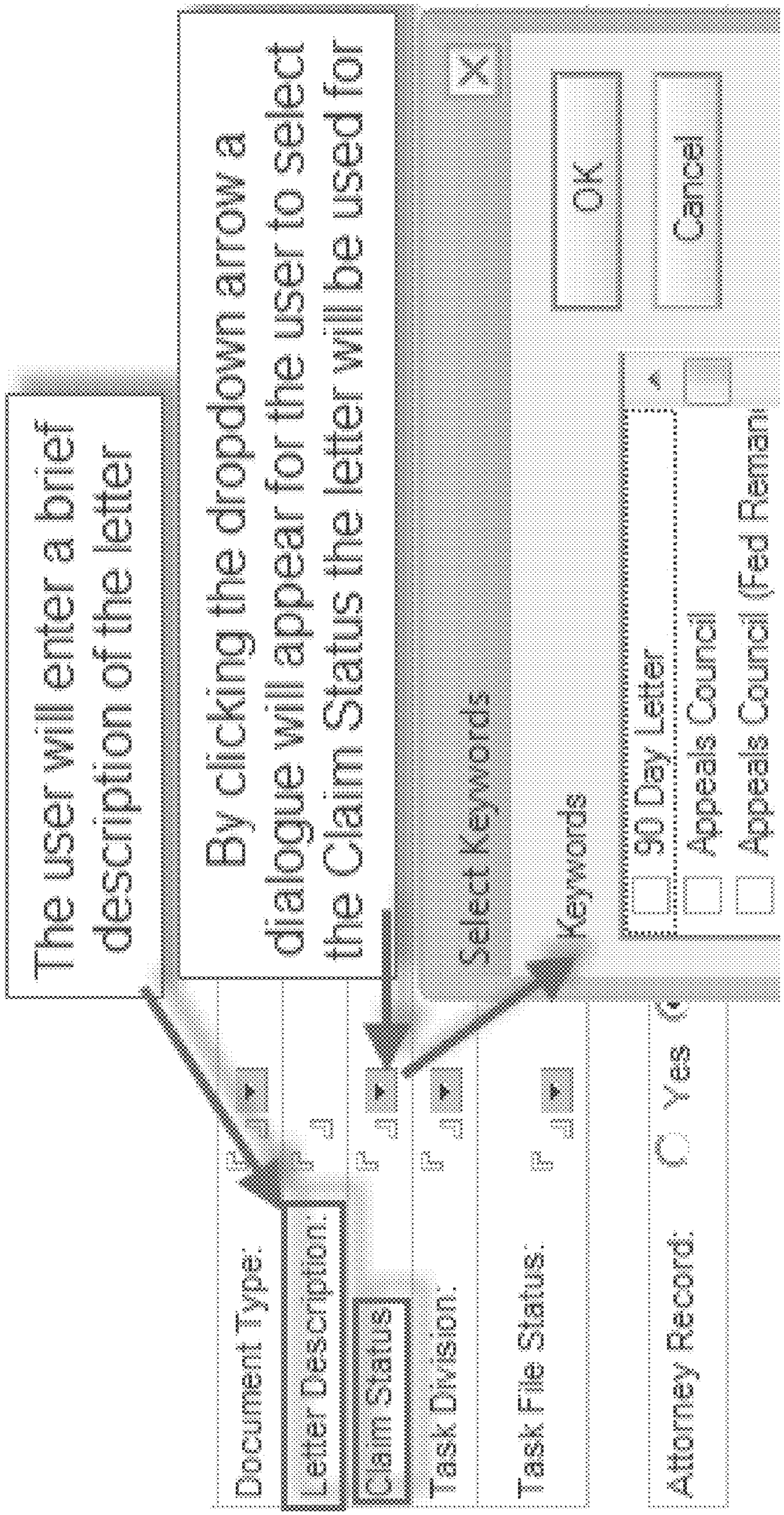
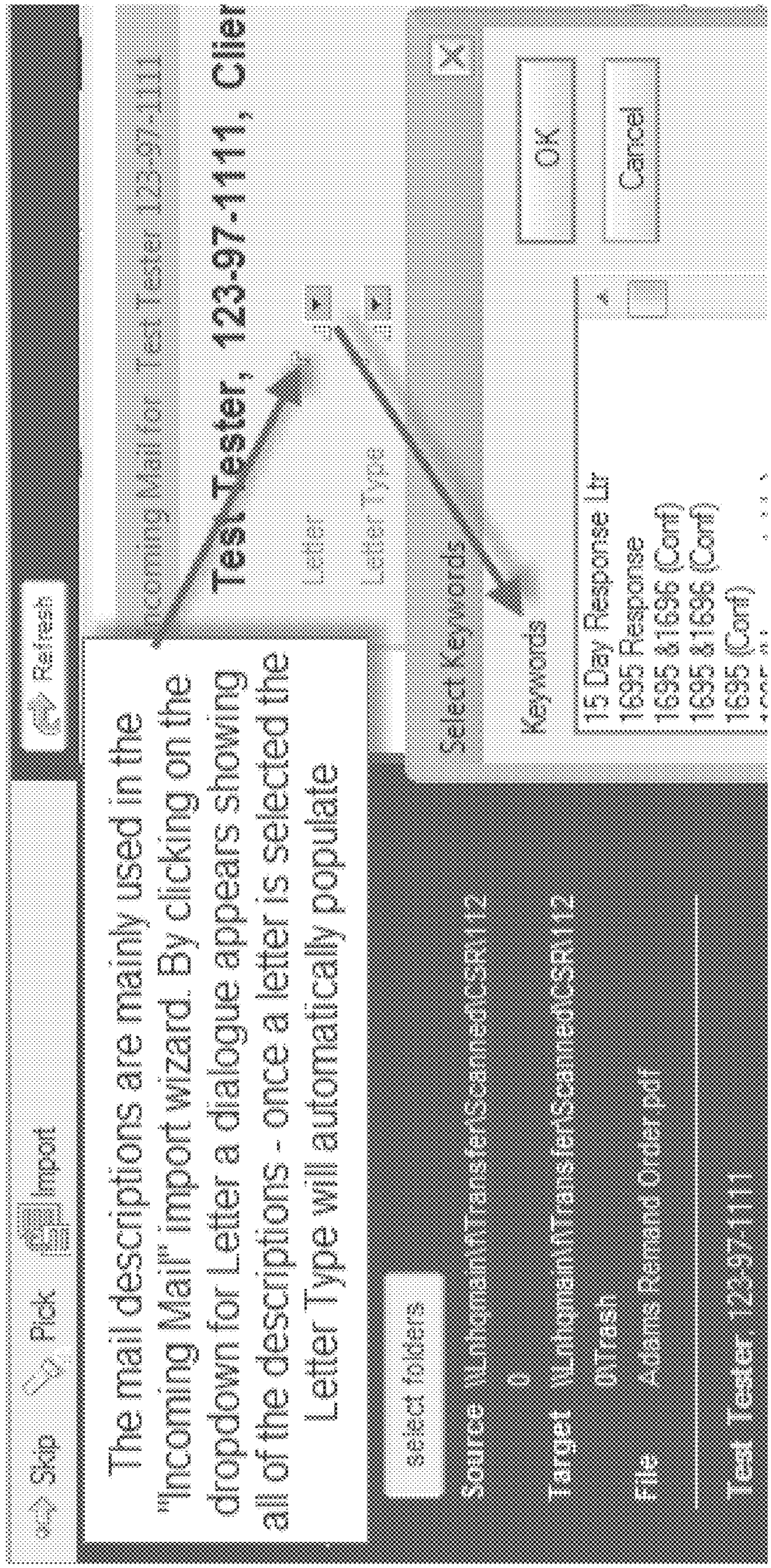


Fig. 215c

Section 4:





Skip
Pick
Import
Refresh
The mail descriptions are mainly used in the "Incoming Mail" import wizard. By clicking on the dropdown for Letter a dialogue appears showing all of the descriptions - once a letter is selected the Letter Type will automatically populate
select folders
Source \\Lnhqman\f\Transfer\Scanned\CSR\112
0
Target \\Lnhqman\f\Transfer\Scanned\CSR\112
0\Trash
File Adams Remand Order.pdf
Test Tester, 123-97-1111
Incoming Mail for Test Tester 123-97-1111
Test Tester, 123-97-1111,
Letter
Letter Type
Select Keywords
Keywords
15 Day Response Ltr
1695 Response
1695 &1696 (Conf)
1695 &1695 (Conf)
1695 (Conf)
OK
Cancel

Fig. 216

Fig. 217

Reminders

Reminder codes have been configured in the database to help organize developing a file. The user can assign Reminders and complete Reminders as they are developing a file.

This print screen is the Landing page for CDs.

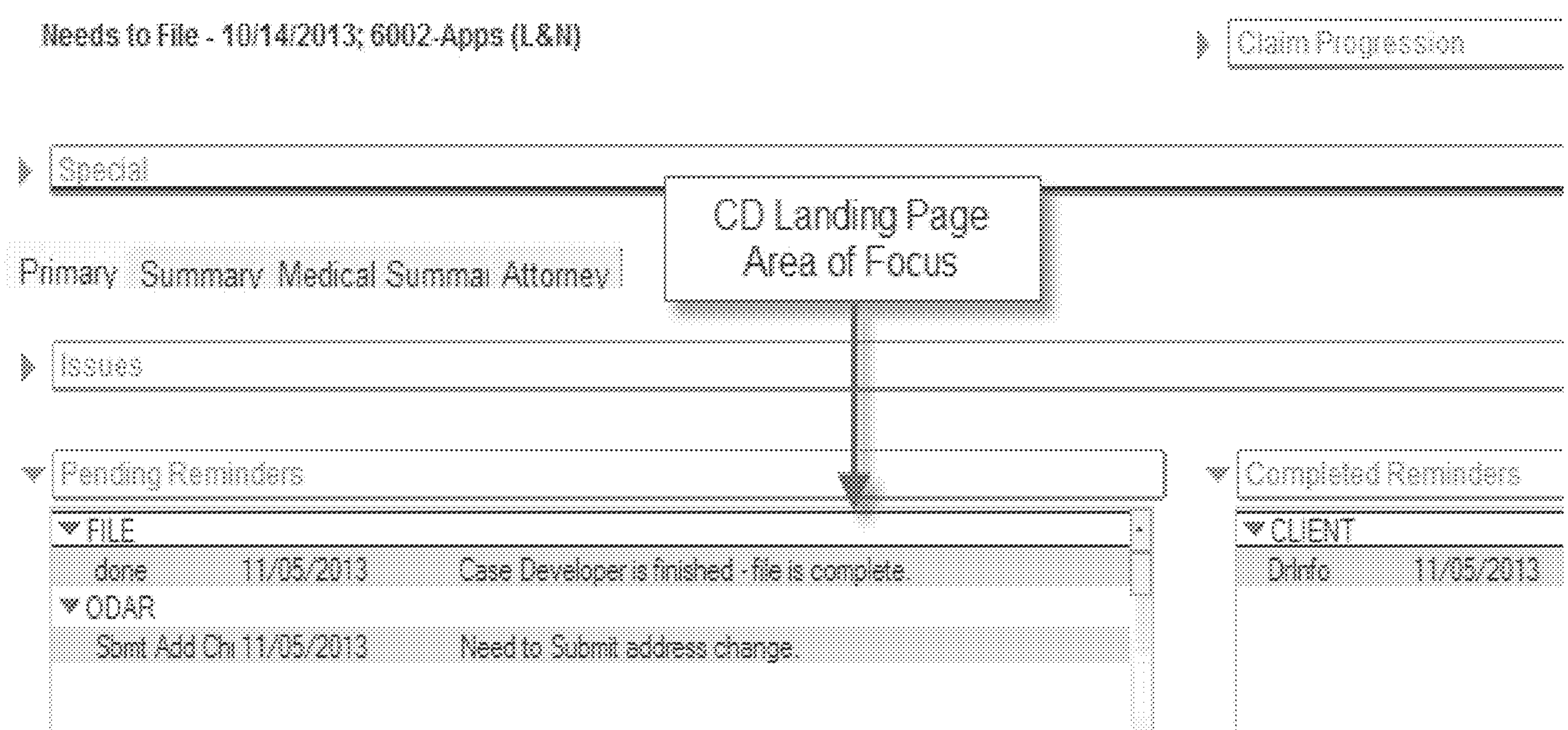


Fig. 218

The Case Development Department Manager can update Reminders on this configuration view

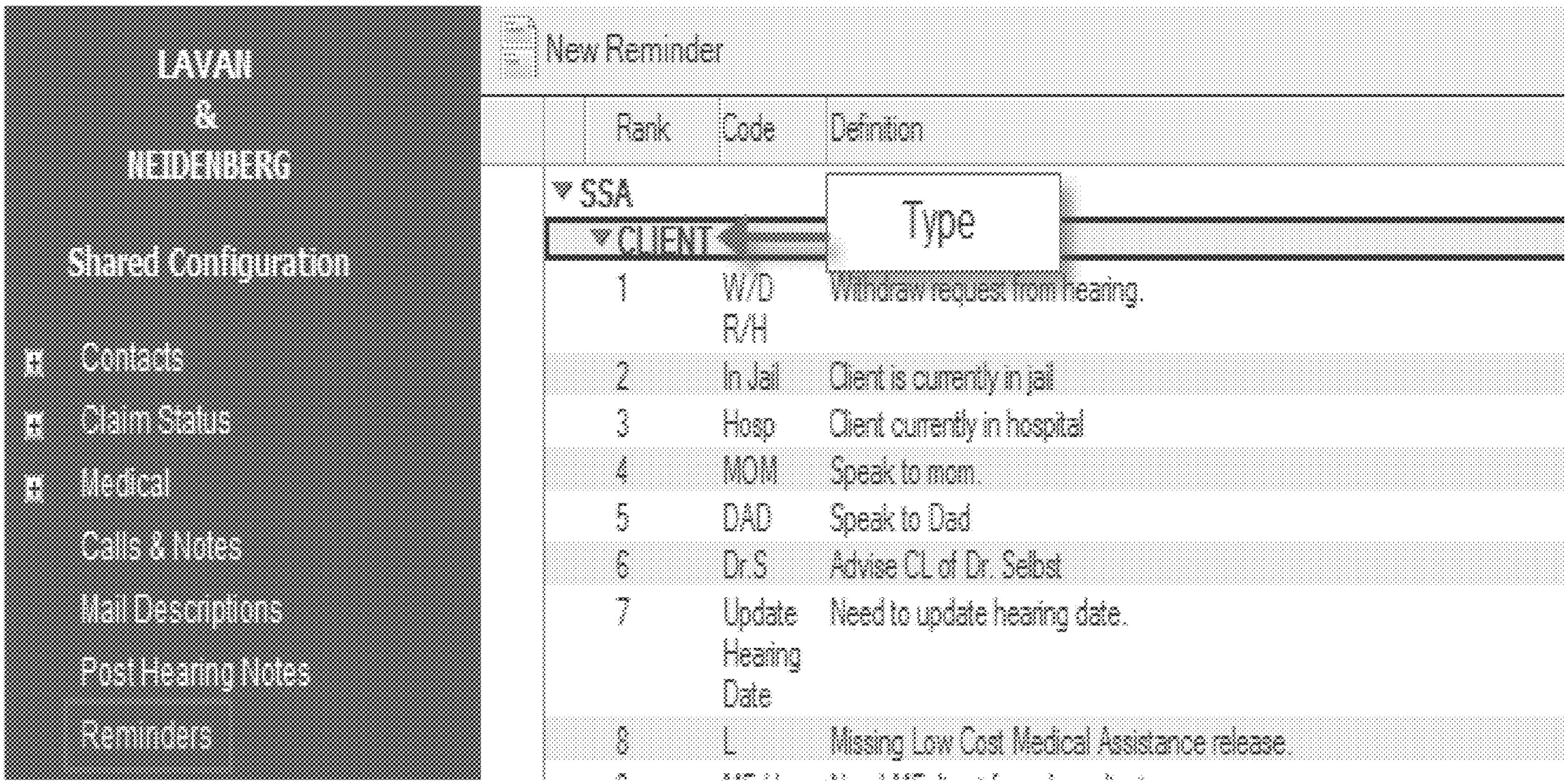


Fig. 219a

Reminders are assigned by the Case Developer in charge of developing that particular case. The Remind are set up to give the Case Developer and team members a snap shot of a case at any time during the process.

To add a Reminder:

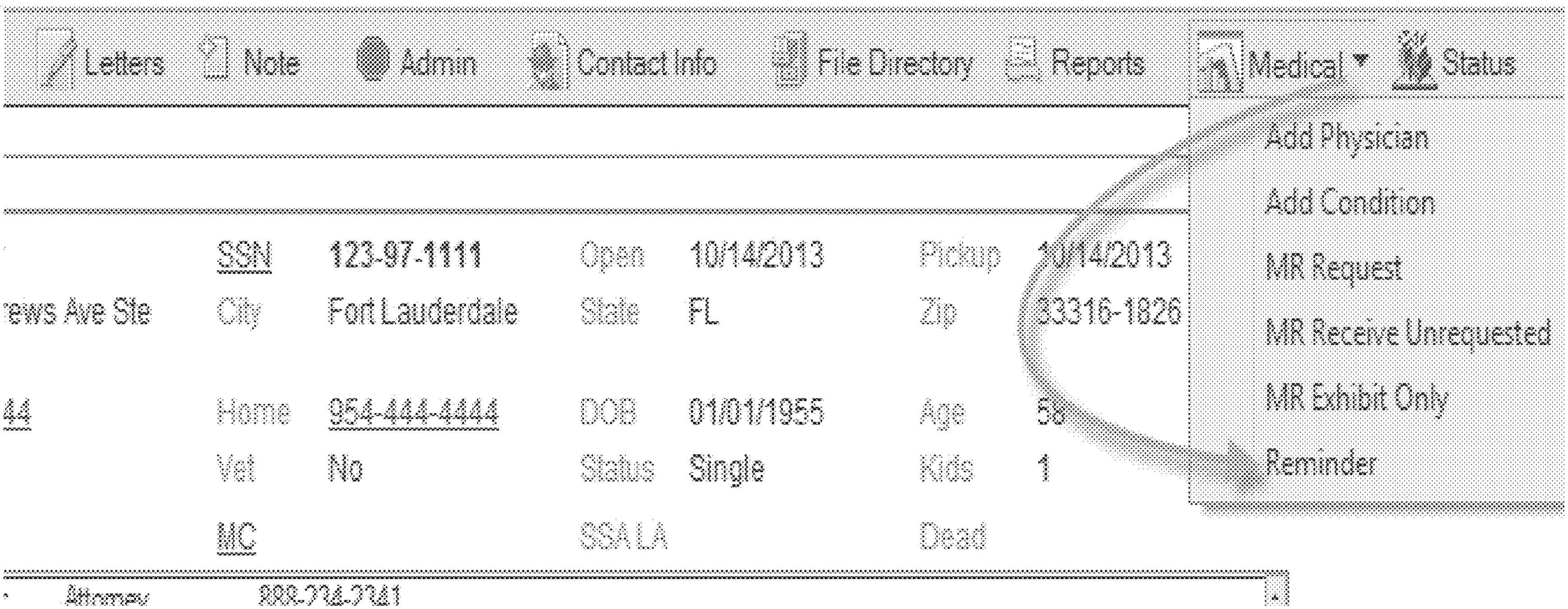


Fig. 219b

After the user clicks on Reminder, a window will appear allowing the user to select the Reminder Type.

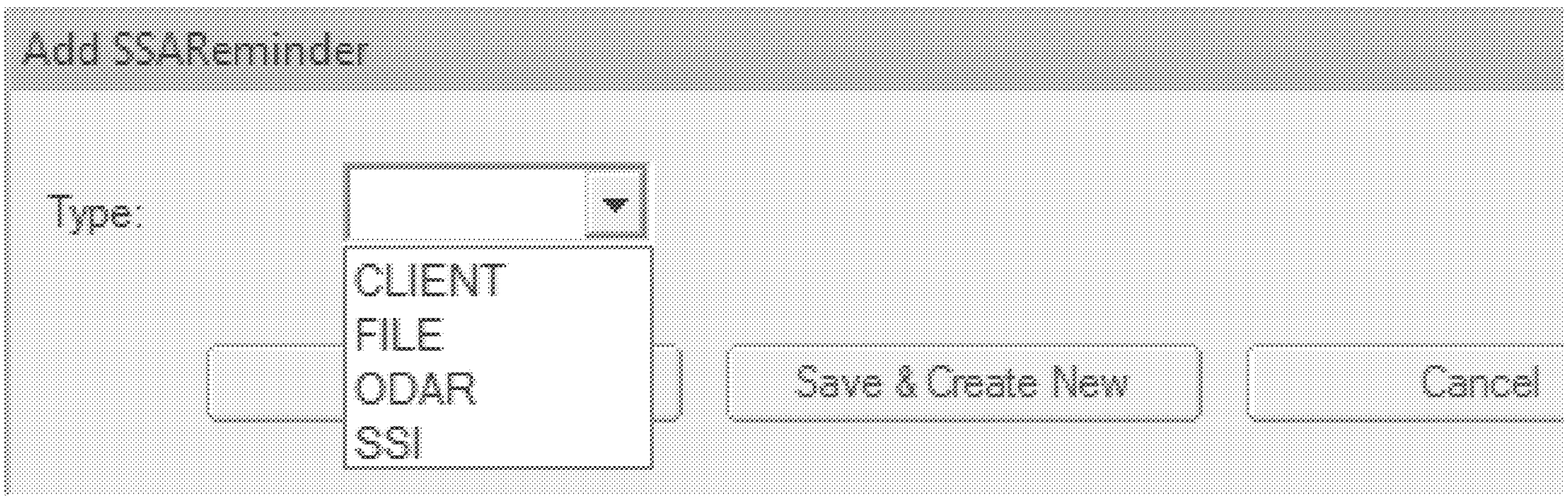


Fig. 219c

Each Reminder Type has a preset list of Reminders to choose from or a Miscellaneous box for the user to type freely.

CLIENT:

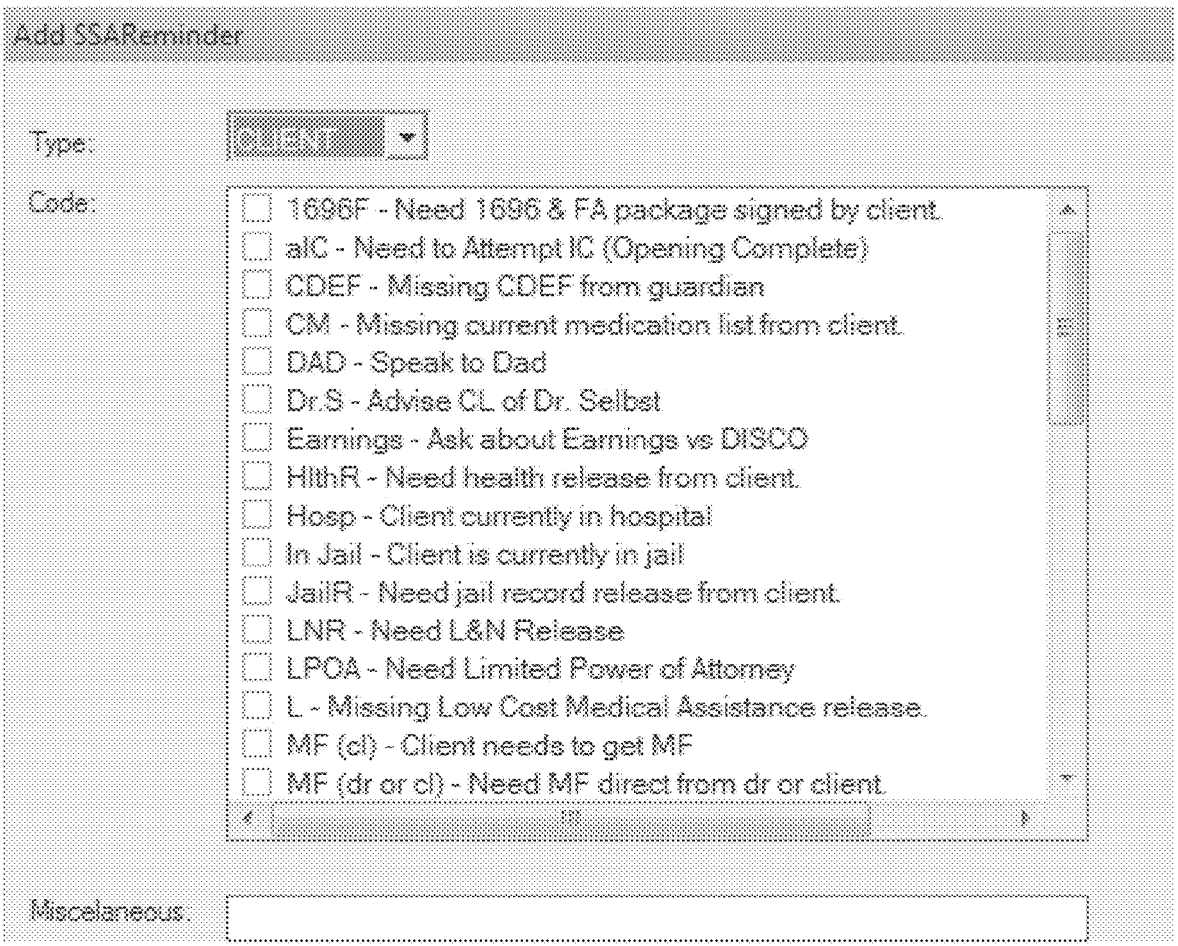


Fig. 219d

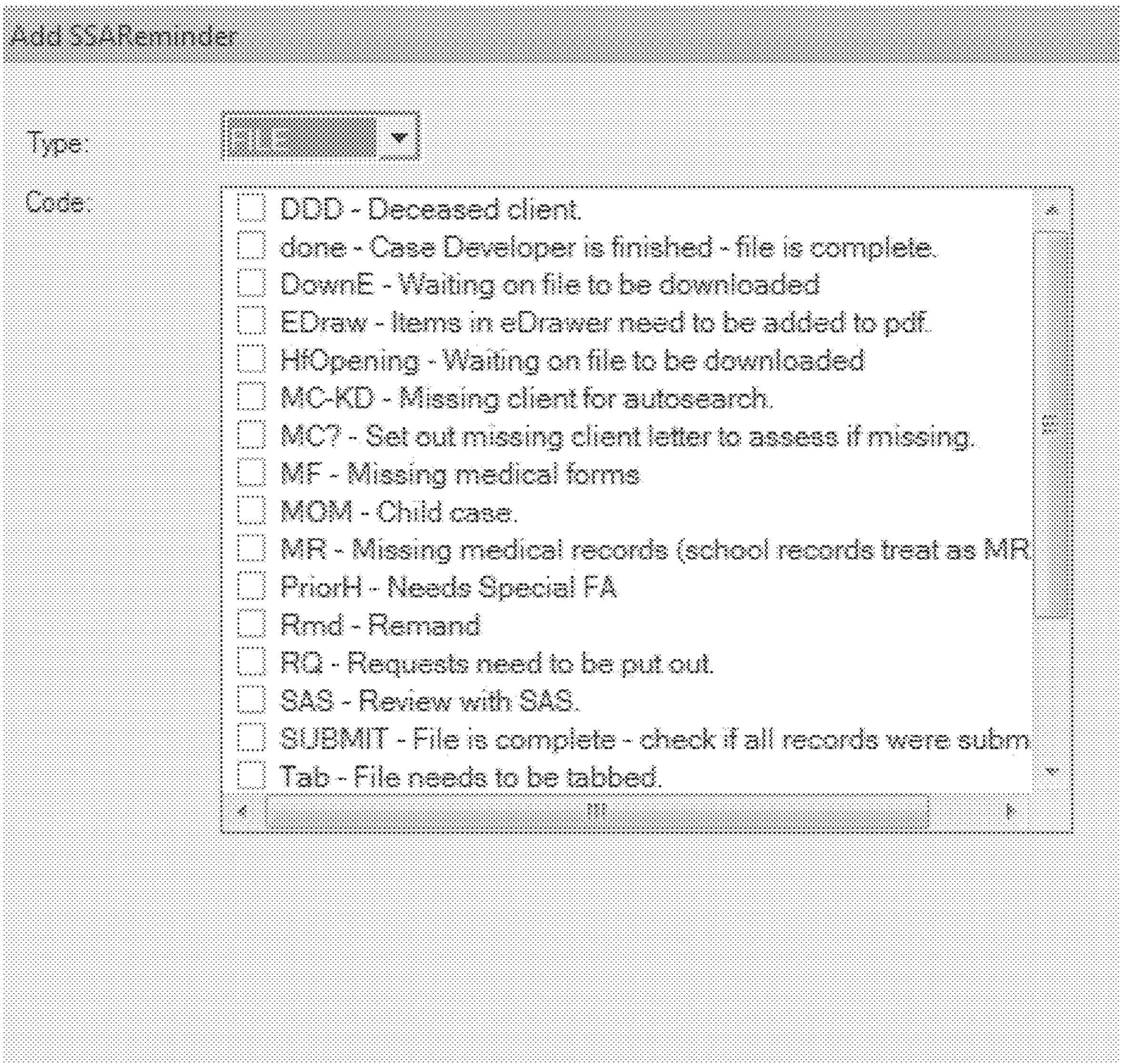

Add SSAReminder
Type:
FILE
Code:
DDD - Deceased client.
done - Case Developer is finished - file is complete.
DownE - Waiting on file to be downloaded
EDraw - Items in eDrawer need to be added to pdf.
HfOpening - Waiting on file to be downloaded
MC-KD - Missing client for autosearch.
MC? - Set out missing client letter to assess if missing.
MF - Missing medical forms
MOM - Child case.
MR - Missing medical records (school records treat as MR
PriorH - Needs Special FA
Rmd - Remand
RQ - Requests need to be put out.
SAS - Review with SAS.
SUBMIT - File is complete - check if all records were subm
Tab - File needs to be tabbed.

Fig. 220a

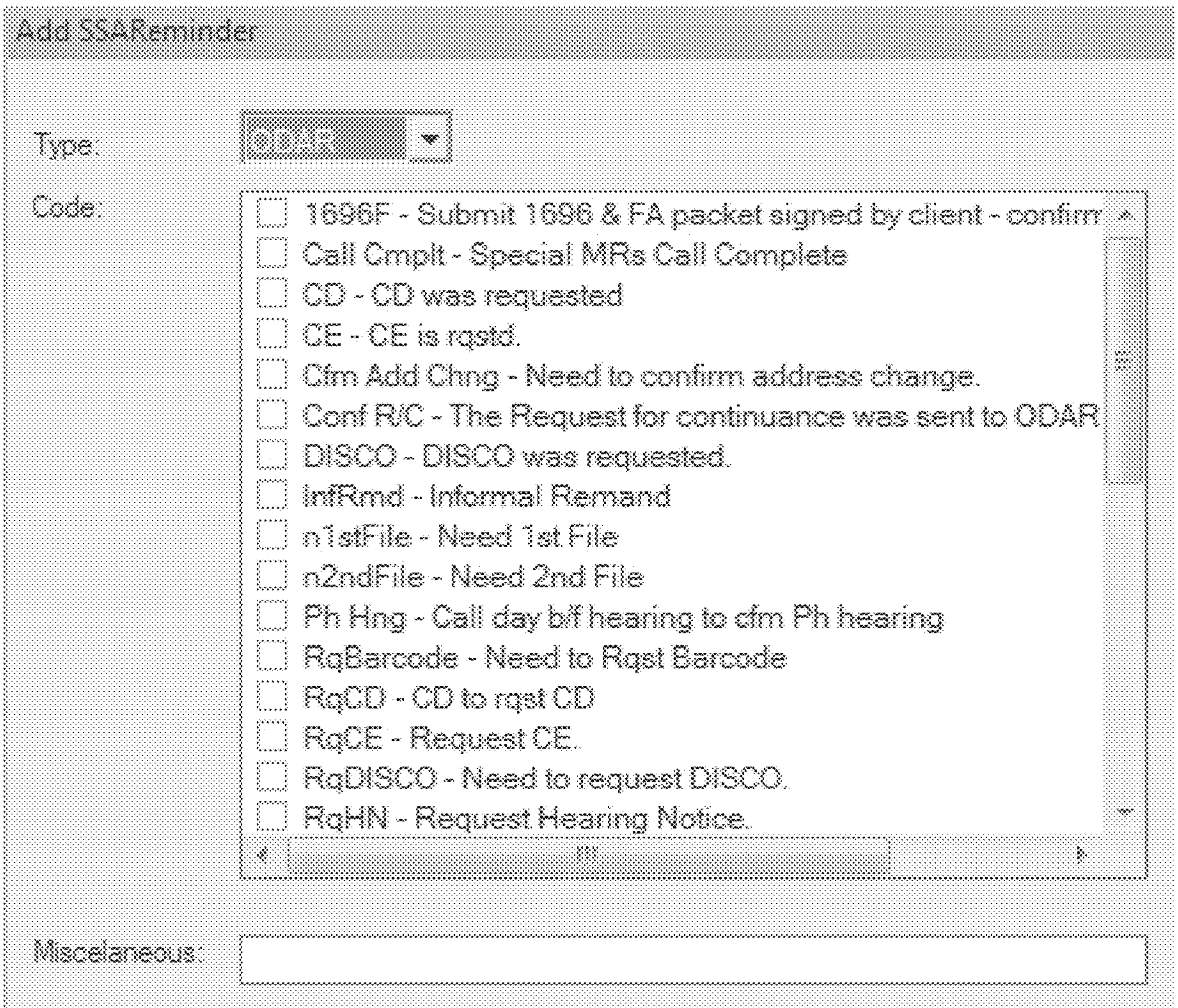

Add SSAReminder
Type:
ODAR
Code:
1696F - Submit 1696 & FA packet signed by client - confirm
Call Cmplt - Special MRs Call Complete
CD - CD was requested
CE - CE is rqstd.
Cfm Add Chng - Need to confirm address change.
Conf R/C - The Request for continuance was sent to ODAR
DISCO - DISCO was requested.
InfRmd - Informal Remand
n1stFile - Need 1st File
n2ndFile - Need 2nd File
Ph Hng - Call day b/f hearing to cfm Ph hearing
RqBarcode - Need to Rqst Barcode
RqCD - CD to rqst CD
RqCE - Request CE.
RqDISCO - Need to request DISCO.
RqHN - Request Hearing Notice.
Miscelaneous:

Fig. 220b

A check mark will appear once the user selects the box with the corresponding Reminder.

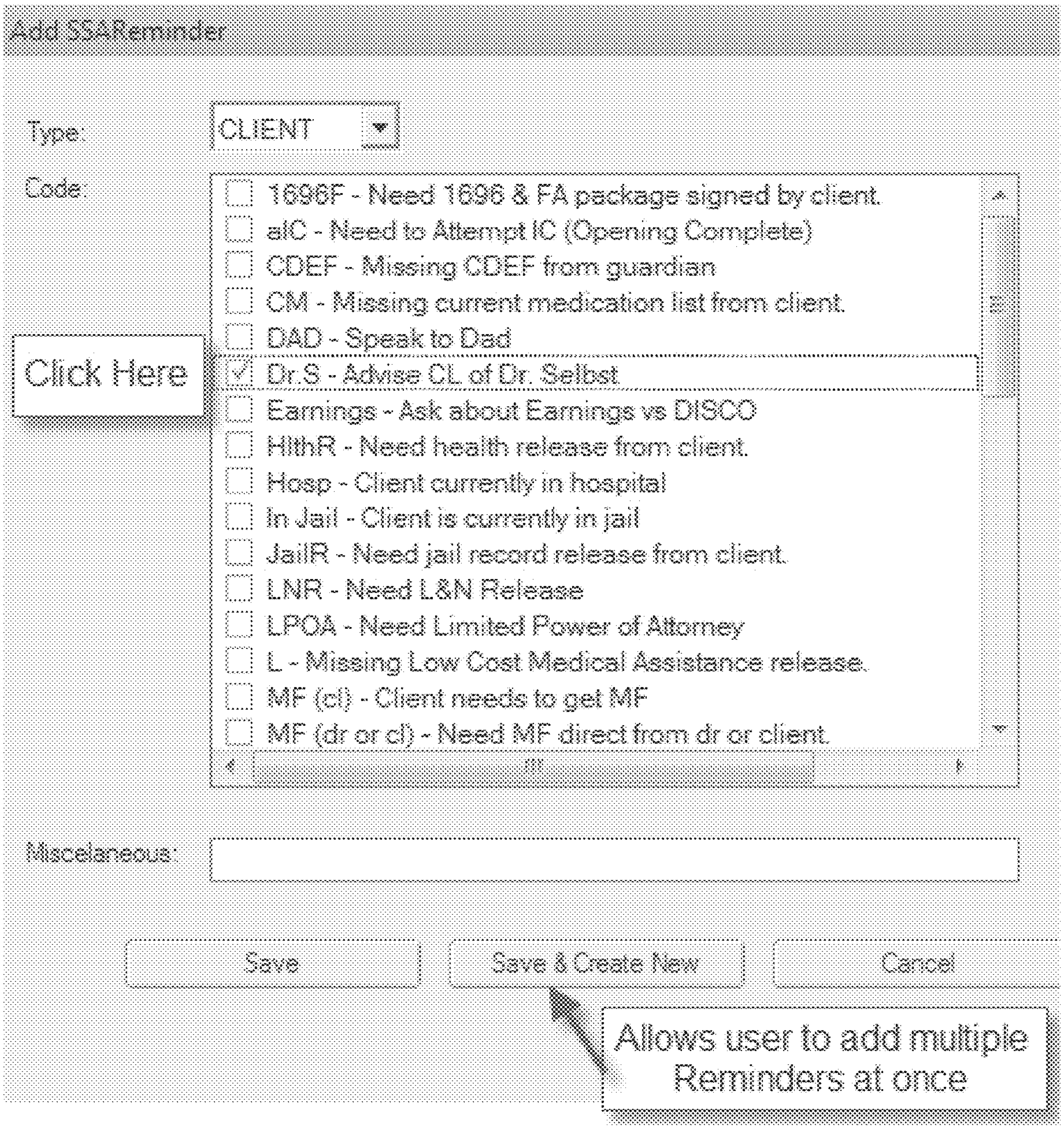


Fig. 221a

After the user saves their selection it will appear under Pending Reminders, categorized by Type.

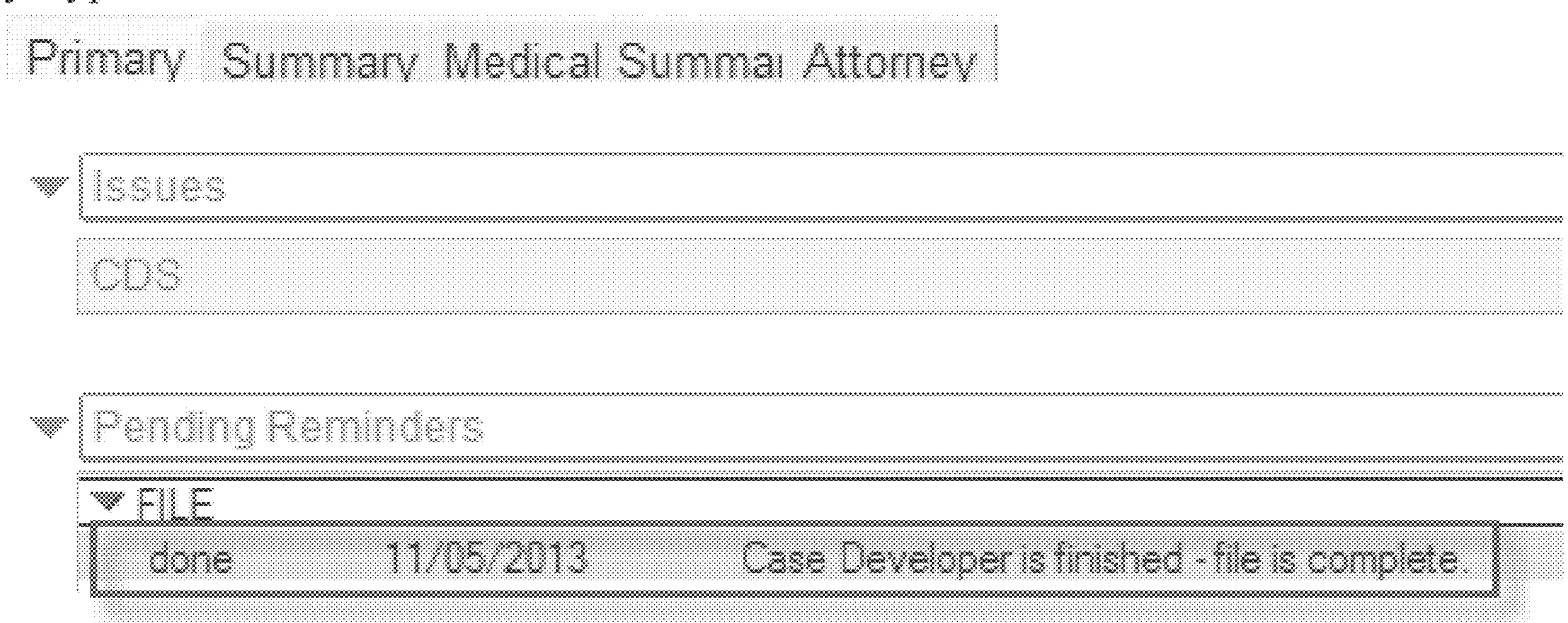


Fig. 221b

When the item is not longer pending, the Reminder may be moved to the Completed Reminders box.

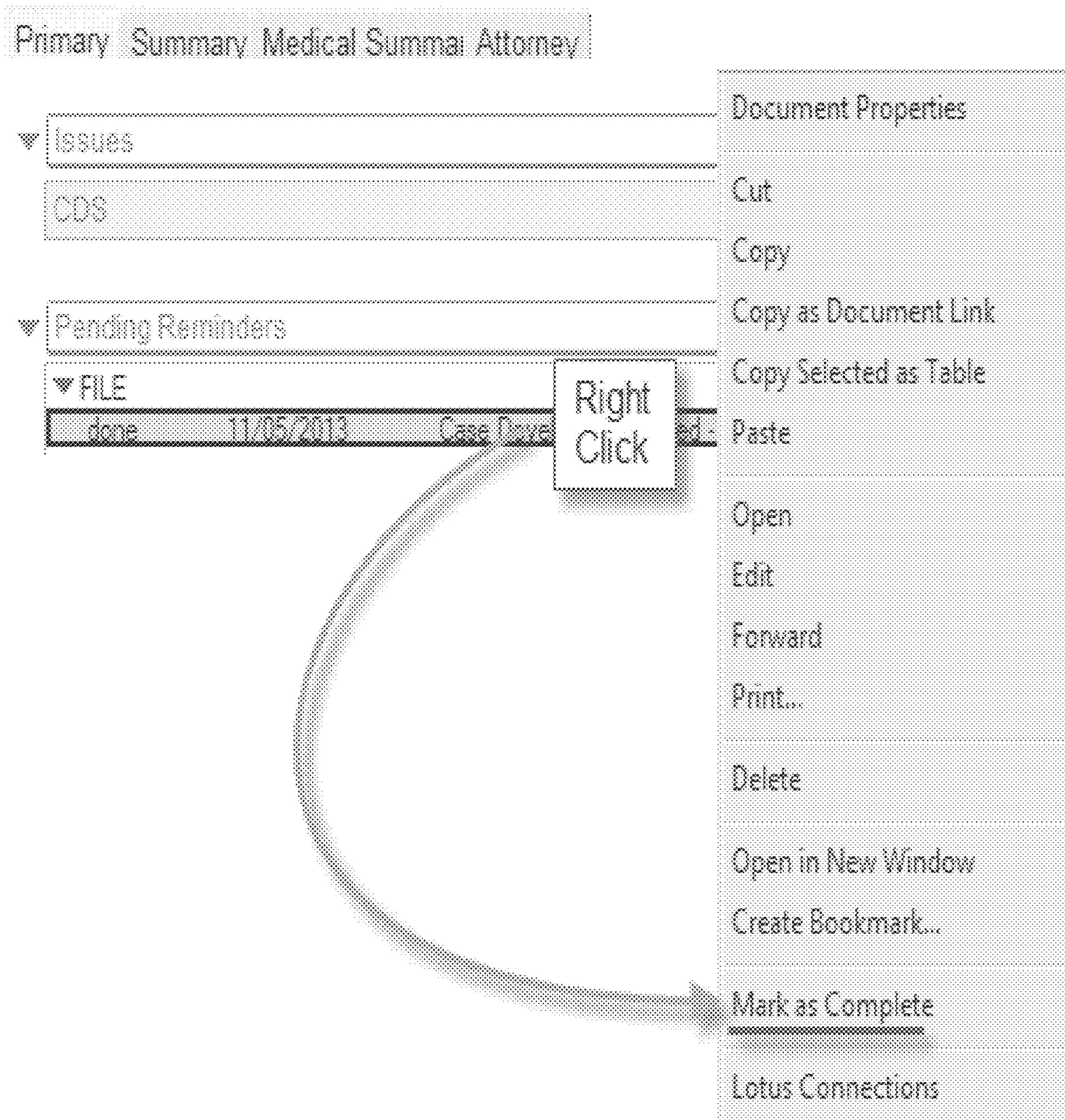
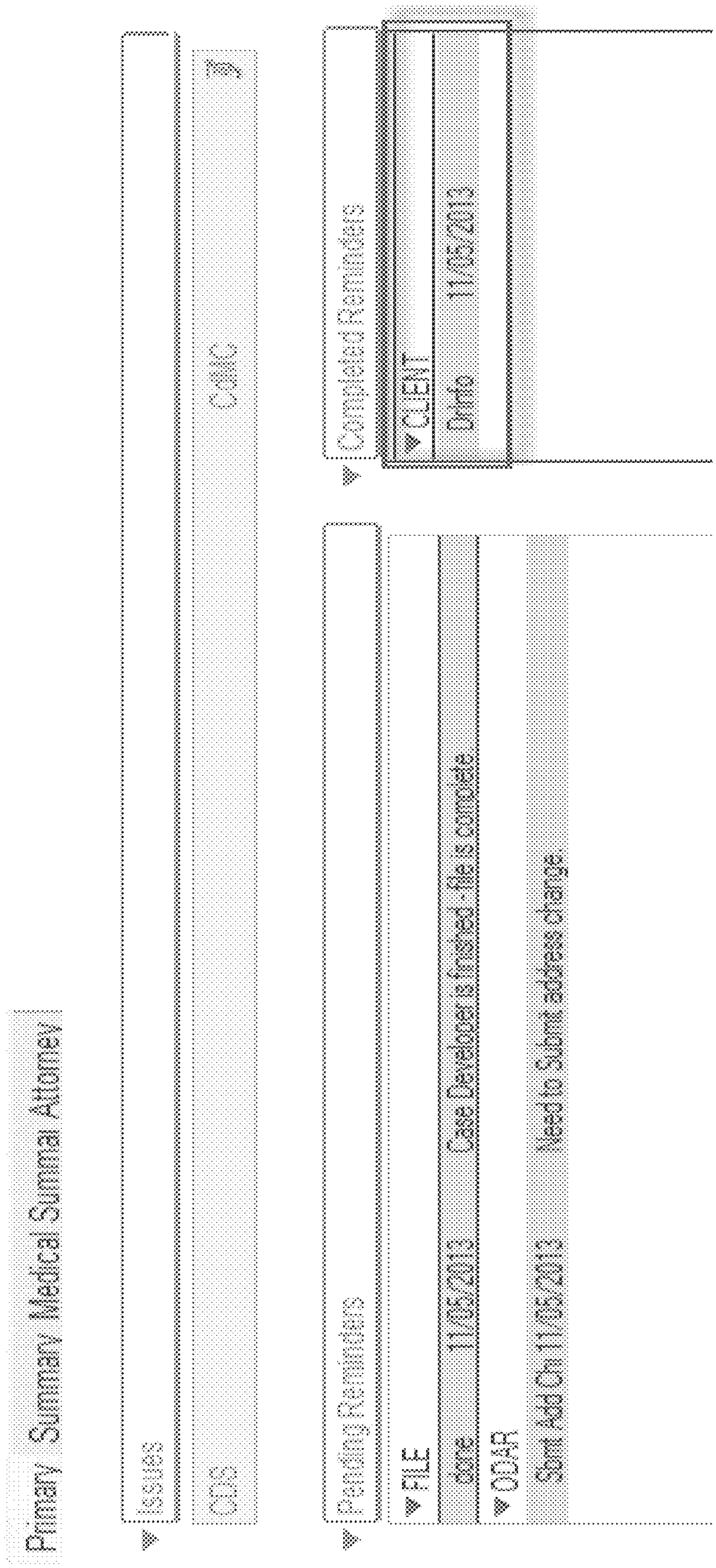


Fig. 222a



Primary Summary Medical Summai Attorney
Issues
CDS
CMC
Pending Reminders
FILE
done 11/05/2013 Case Developer is finished - file is complete
ODAR
Sbmt Add On 11/05/2013 Need to Submit address change
Completed Reminders
CLIENT
Dinfo 11/05/2013

Fig. 222b

In this view the Case Developer and team members can see all of the pending cases and instantly know exactly what is remaining to be completed in the case.

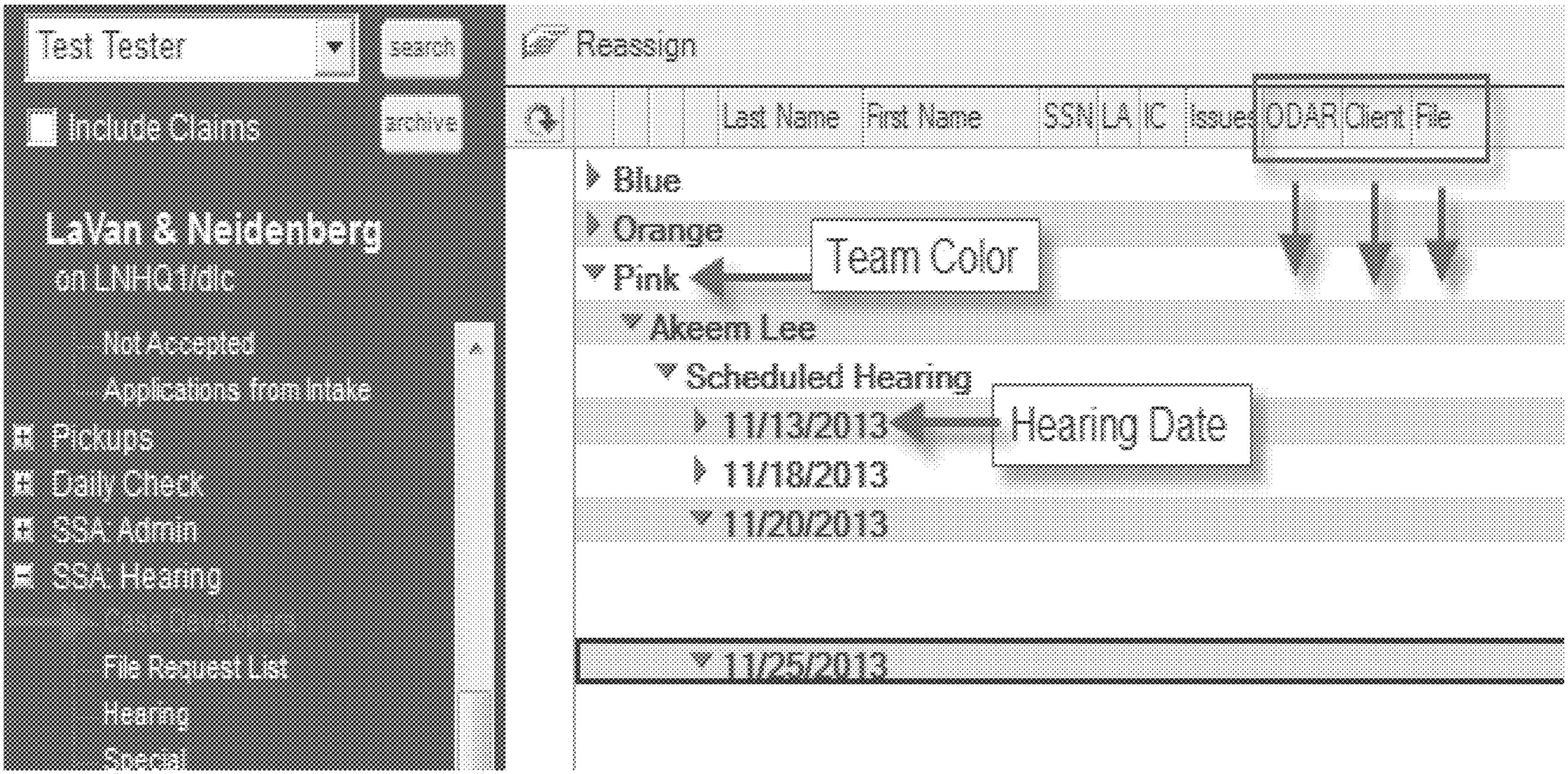


Fig. 223

Initial Call Questionnaire

The Initial Call (IC) Questionnaire guides the user in obtaining information when developing a claims file. The IC Questionnaire prompts the user to ask questions that are relevant to that client's claim.

Introduction | Medical | WH/Jail | Conclusion

Hearing Initial Call – Introduction

Hello, My name is Marissa Fuller from your Attorney's office, LaVan & Neidenberg. I would like to tell you about your upcoming hearing and review your claim information to confirm that everything is upto date and correct.

Your hearing is on 11/11/2013 at 10:00 AM in <<N/A>>. Your attorney would like you to arrive at the hearings office at09:00 AM.

Within a few days you will receive a packet from our office.

Is your address still — 1214 S Andrews Ave Ste 301, Fort Lauderdale, FL 33316-1826

Confirm phone numbers

Cell: 954-444-4444

Home: 954-444-4444

Contacts

Marissa Fuller	Attorney Representative	888-234-2341
Test Test	Spouse (current)	954-444-4444

Confirm email — None

Fig. 224a

The IC Questionnaire is divided into 4 tabs: Introduction, Medical, WH/Jail, and Conclusion.

The Introduction tab contains dialogue that prompts the user to explain who they are and why they are calling the client. Hearing and contact information are automatically generated from the contact's Scheduled Hearing box and Contact Summary.

Introduction | Medical | WH/Jail | Conclusion |

User

Hearing Initial Call – Introduction

Hello, My name is Marissa Fuller from your Attorney's office, LaVan & Neidenberg. I would like to tell you about your upcoming hearing and review your claim information to confirm that everything is upto date and correct.

Your hearing is on 11/11/2013 at 10:00 AM in <<N/A>>. Your attorney would like you to arrive at the hearings office at09:00 AM.

Within a few days you will receive a packet from our office.

Is your address still: 1214 S Andrews Ave Ste 301, Fort Lauderdale, FL 33316-1826

Confirm phone numbers:

Cell: 954-444-4444

Home: 954-444-4444

Contacts:

Marissa Fuller	Attorney Representative	888-234-2341
Test Test	Spouse (current)	954-444-4444

Confirm email: None

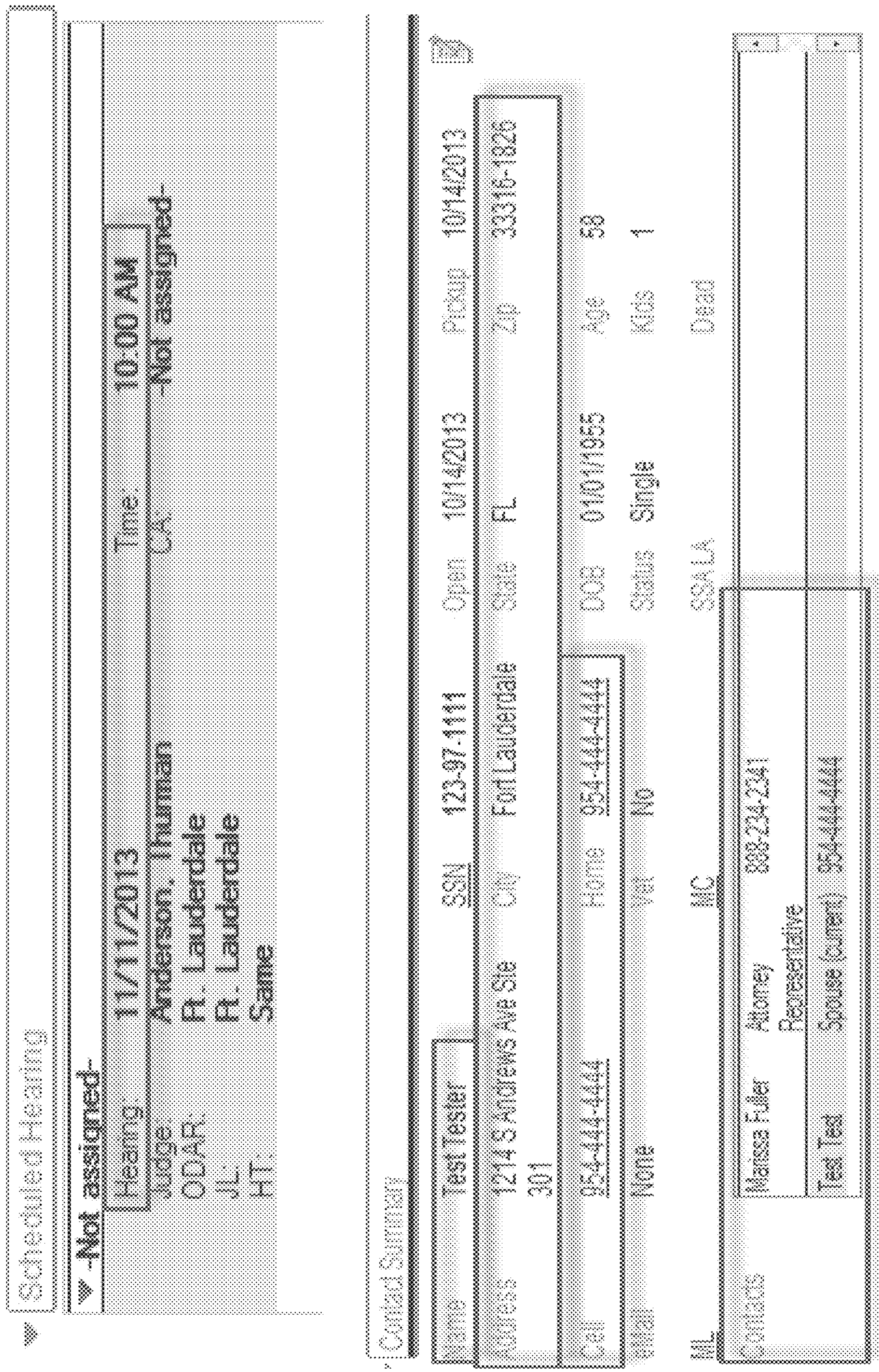

Scheduled Hearing
-Not assigned-
Hearing 11/11/2013
Time 10:00 AM
Judge Anderson, Thurman
CA -Not assigned-
ODAR R. Lauderdale
JL R. Lauderdale
HT Same
Contact Summary
Test Tester
SSN 123-97-1111
Open 10/14/2013
Pickup 10/14/2013
1214 S Andrews Ave Ste 301
City Fort Lauderdale
State FL
Zip 33316-1826
Cell 954-444-4444
Home 954-444-4444
DOB 01/01/1955
Age 58
None
Vet No
Status Single
Kids 1
ML
MC
SSA LA
Dead
Contacts
Marissa Fuller Attorney Representative 808-234-2341
Test Test Spouse (current) 954-444-4444

Fig. 224b

Fig. 225a

The Medical tab contains questions regarding the client's conditions, treatment, prescriptions, as well as family, drug abuse, and Social Security benefits history.

Introduction | Medical | WH/Jail | Conclusion

Hearing Initial Call - Medical History

Update Treating Physicians

Fake Clinic (Clinic)	
Joel A'okoli (Acupunturist)	01/01/2010 - 09/01/2013
Test Clinic (Therapist)	

Update Medical Conditions

Show SSA Medical Conditions

Do you use an assistive device?	None
Are you currently taking prescribed medications?	
Do you have Rx bottles or know Rx names?	

Fig. 225b

Marital Status If married, but not living toghether - "Seperated"	Single
Do you have any children?	Yes
How many children do you have? Tip	1
Background	
Height	5 Ft. 8 Inches
Weight	175 Pounds
Drugs	No
Location	
Have Certificate	
Comments	

SSA Benefits	
Currently Receiving Disability or SSI? Early retirement does not count as disability.	No
Ever receive SSA disability or SSI?	No
Why did you file for disability (trauma/disease)?	
DOF: ; AOD 12/01/2011	

Fig. 226

The WH/Jail tab contains questions regarding the client's education, work history, financial, and incarceration history.

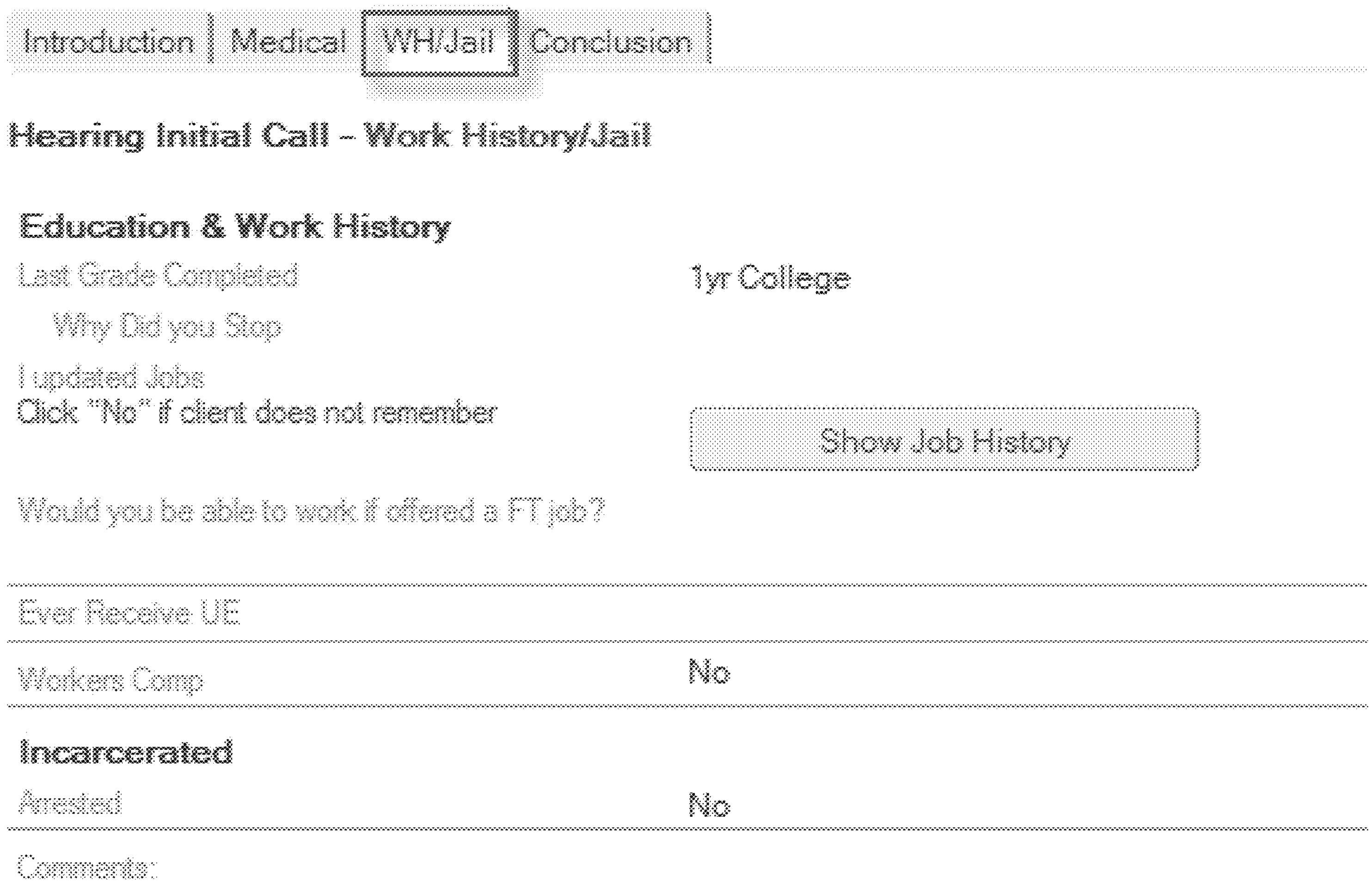


Fig. 227a

The Conclusion tab contains dialogue that prompts the user to remind the client of important information at the end of the phone call.

Introduction | Medical | WH/Jail | Conclusion

Hearing Initial Call – Closing

We are mailing you a packet of information:

There will be several pages in this packet. Please take your time and look through the packet because it contains important information for your disability claim. Everything that I explain is written in the packet.

Information about your hearing is printed on a Blue Page.

The green page is a release for lowcost medical assistance, please sign & return to Low Cost Medical Assistance via fax or mail. It is an organization who will give us advice on medical terms.

The white forms are for you to take to your Doctor. We are also sending the forms to your doctors, but it is more likely they will fill it out if you bring it to them. These forms that you will receive can really be helpful to prove your claim to the judge. Once they are filled out please return them to us immediately.

The Attorney will call you the day before your hearing to go over the case with you. Please make sure you are available to speak with the attorney. The attorney will meet you at - insert time - to discuss your claim again - this will help you prepare for the hearing.

Please call us if any of your information regarding your case changes, such as: contact information, medical conditions, doctor information, or any other changes regarding your claim.

We will contact you if we have further questions.

The IC is completed to the best of my knowledge. ◉ Yes ○ No

Previous | Completed Initial Call

Fig. 227b

The user must enter the edit window in order to complete or edit the IC Questionnaire.

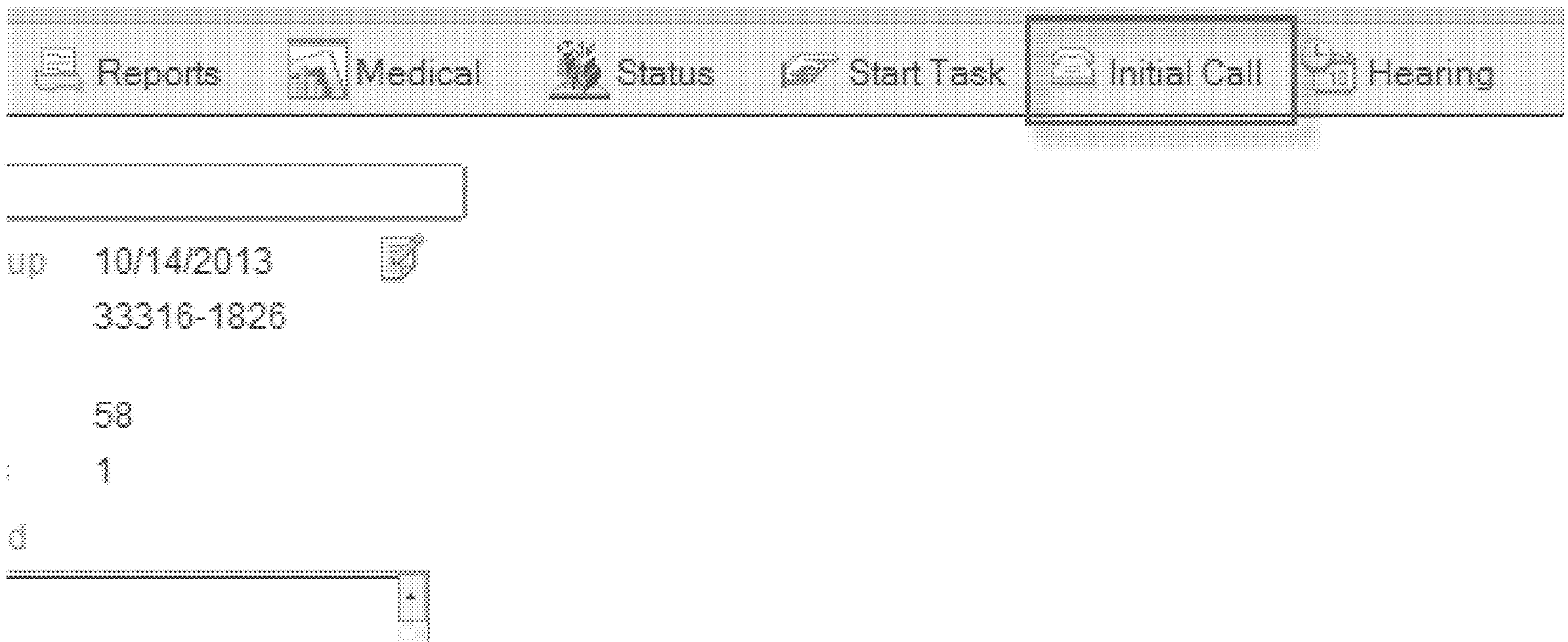


Fig. 228

The user may update the client's address or add an additional contact from this window.

Close Save Open

Introduction | Medical | WH/Jail | Conclusion

Hearing Initial Call – Introduction

Hello, My name is Marissa Fuller from your Attorney's office, LaVan & Neidenberg. I would like to tell you about your upcoming hearing and review your claim information to confirm that everything is upto date and correct.

Your hearing is on 11/11/2013 at 10:00 AM in <<N/A>>. Your attorney would like you to arrive at the hearings office at09:00 AM.

Within a few days you will receive a packet from our office.

Is your address still — 1214 S Andrews Ave Ste 301, Fort Lauderdale, FL 33316-1826 — Update Address

Confirm phone numbers — Cell: 954-444-4444 — Home: 954-444-4444 — Add Contact

Contacts

Marissa Fuller	Attorney Representative	888-234-2341
Test Test	Spouse (current)	954-444-4444

Confirm email — None

Next

Fig. 229a

When the user clicks "Update Address" this window will appear and the user will follow the prompts to add the new address.

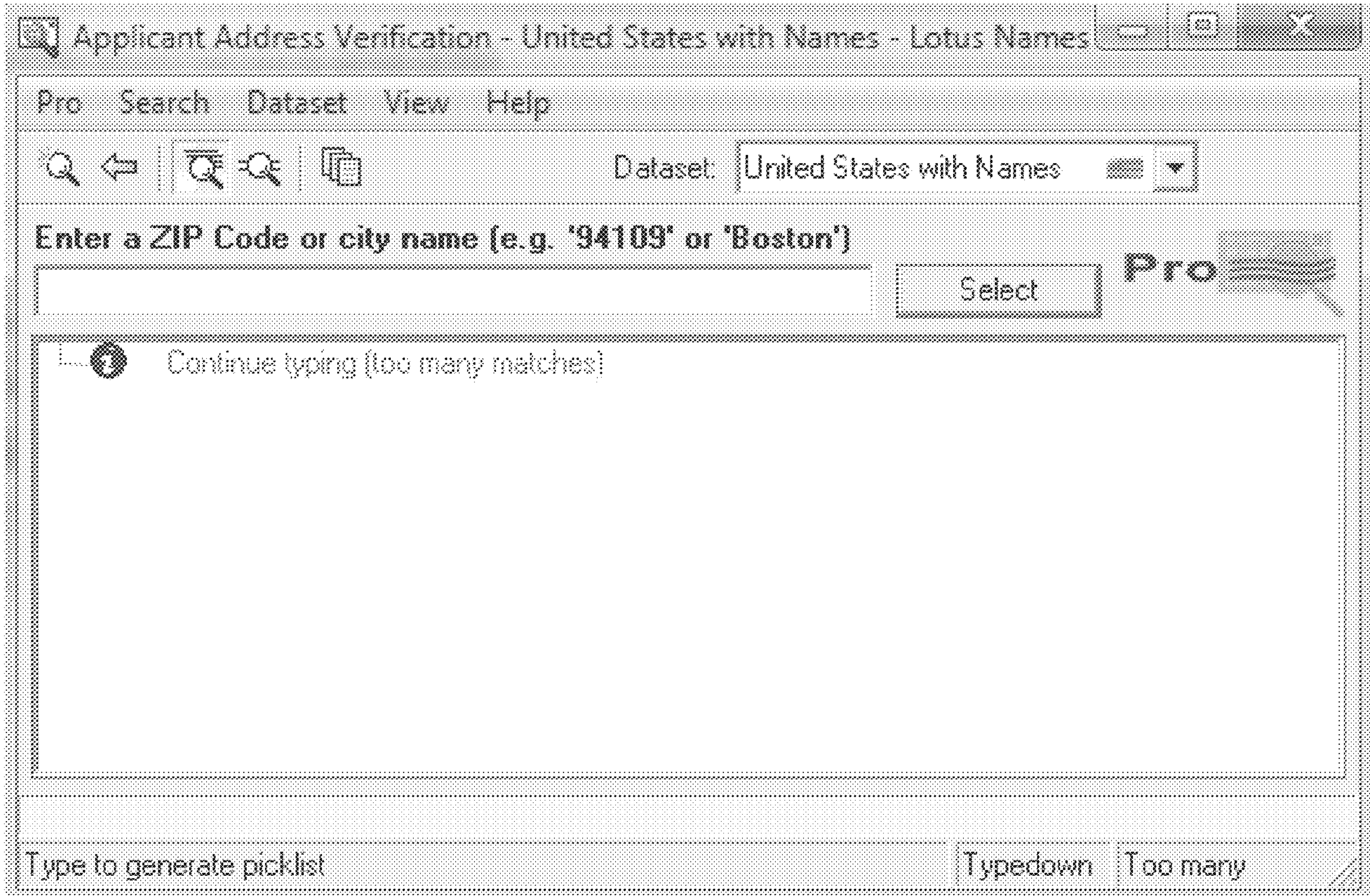


Fig. 229b

The updated address will appear in the contact from this window

Contact Summary

Name	Test Tester	SSN	123-97-1111	Open	10/14/2013	Pickup	10/14/2013
Address	1214 S Andrews Ave Ste 301	City	Fort Lauderdale	State	FL	Zip	33316-1826
Cell	954-444-4444	Home	954-444-4444	DOB	01/01/1955	Age	58
eMail	None	Vet	No	Status	Single	Kids	1

Fig. 230a

When the user clicks "Add Contact" these windows will appear to add an additional contact.

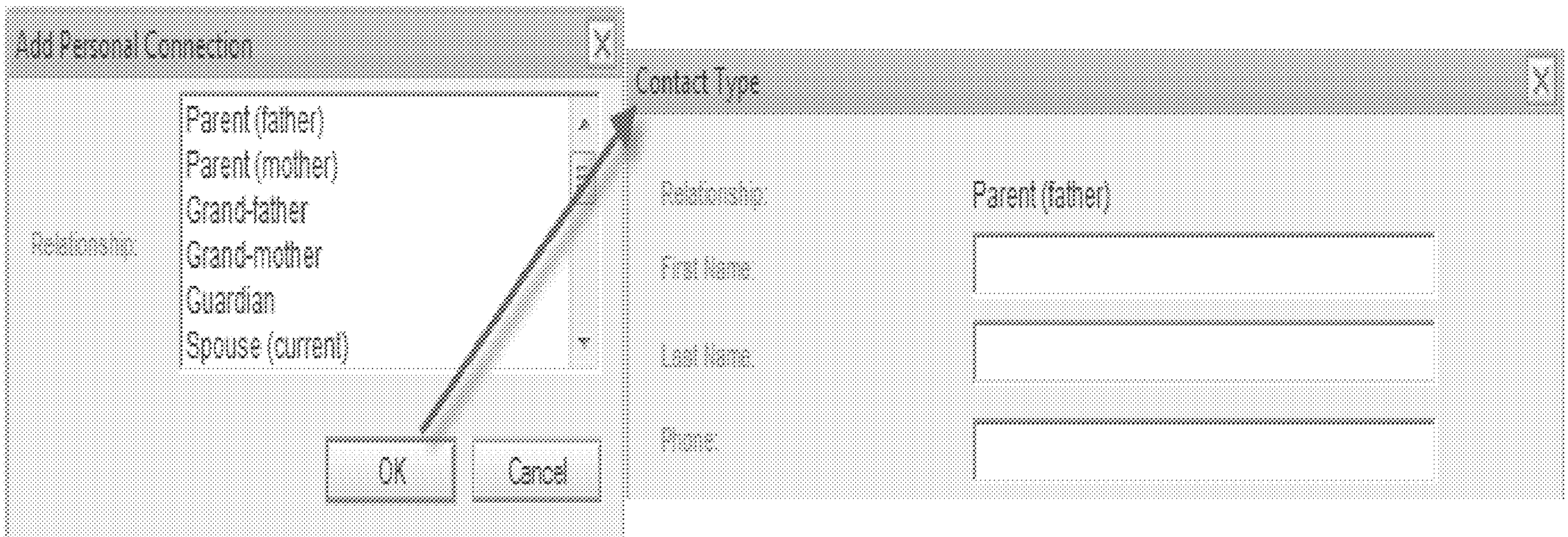


Fig. 230b

The additional contact will appear here.

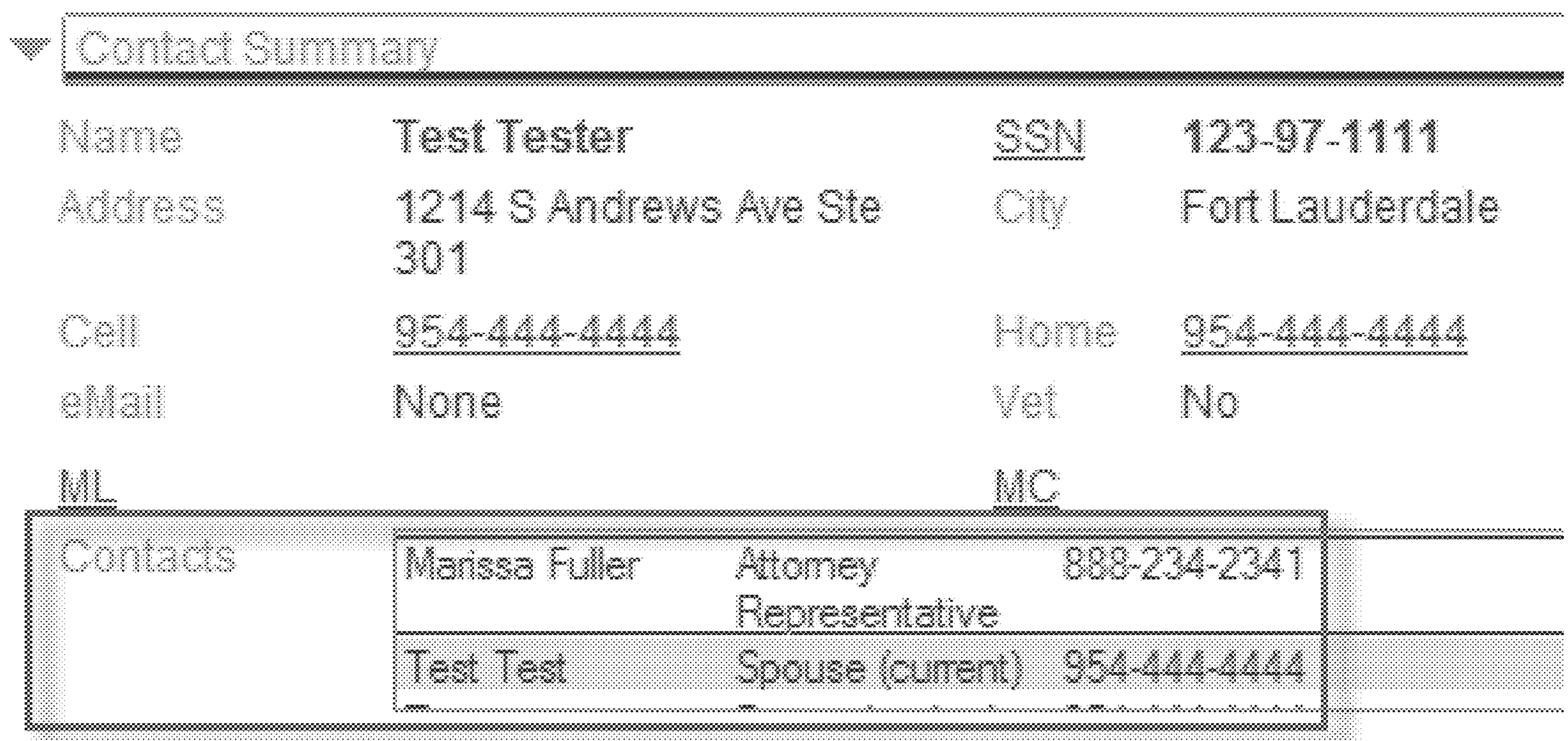


Fig. 230c

The user may edit the existing contact information from this window by clicking inside the field

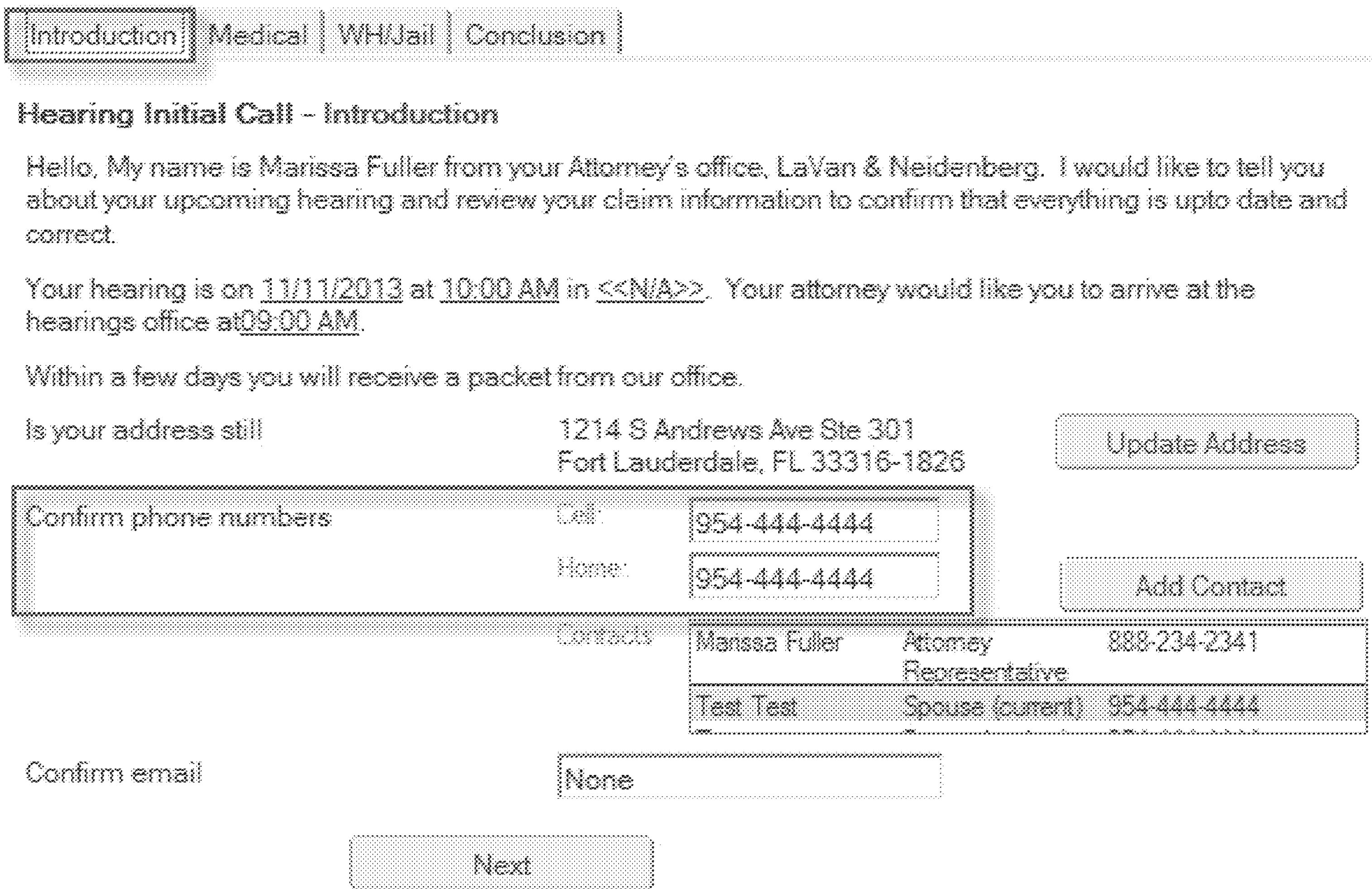


Fig. 231

The user may add or edit the Doctor/Facility list and any of its entries from the following window.

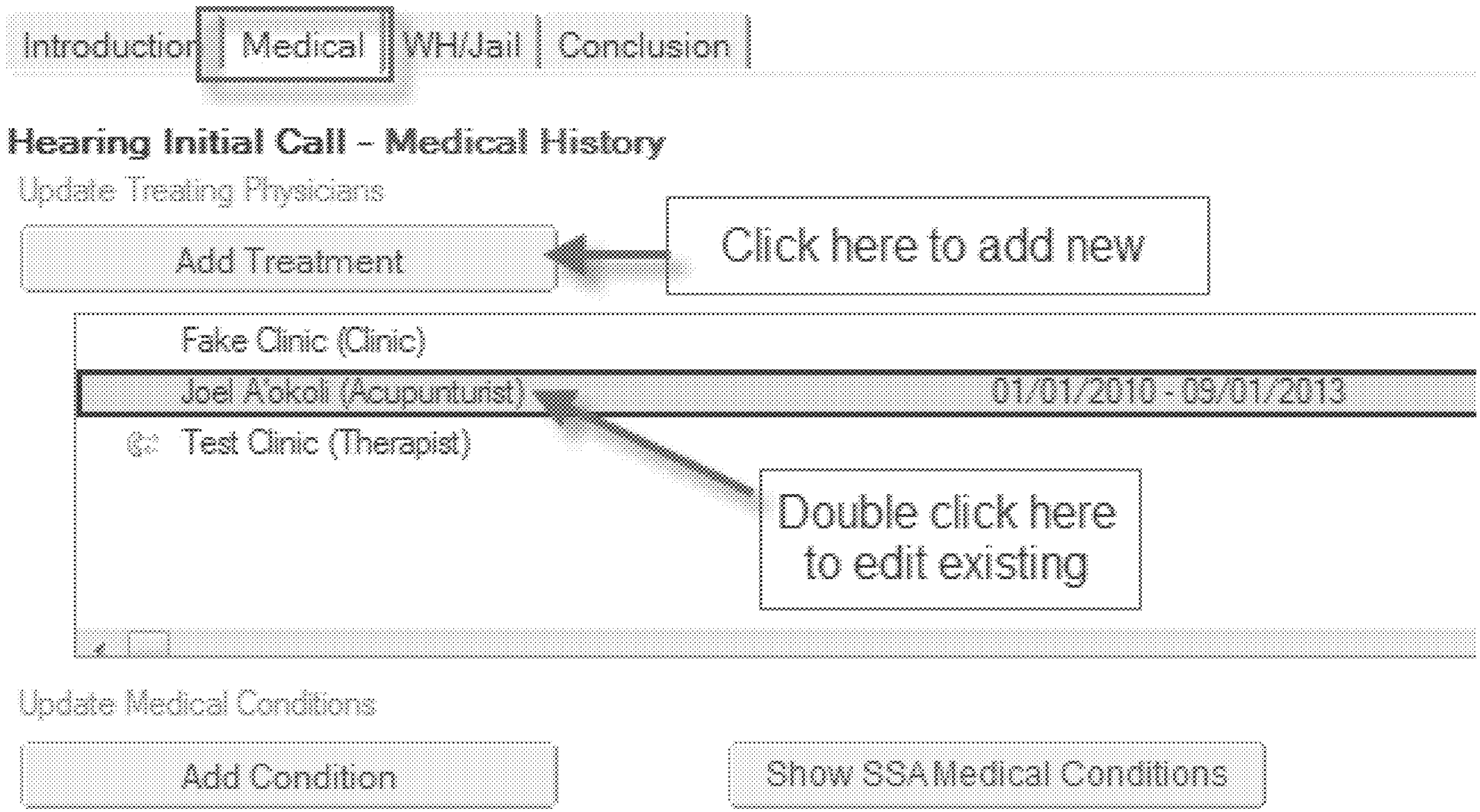


Fig. 232

After clicking "Add Treatment" the following windows appear so that the user may add a Doctor or Facility to the Doctor/Facility list.

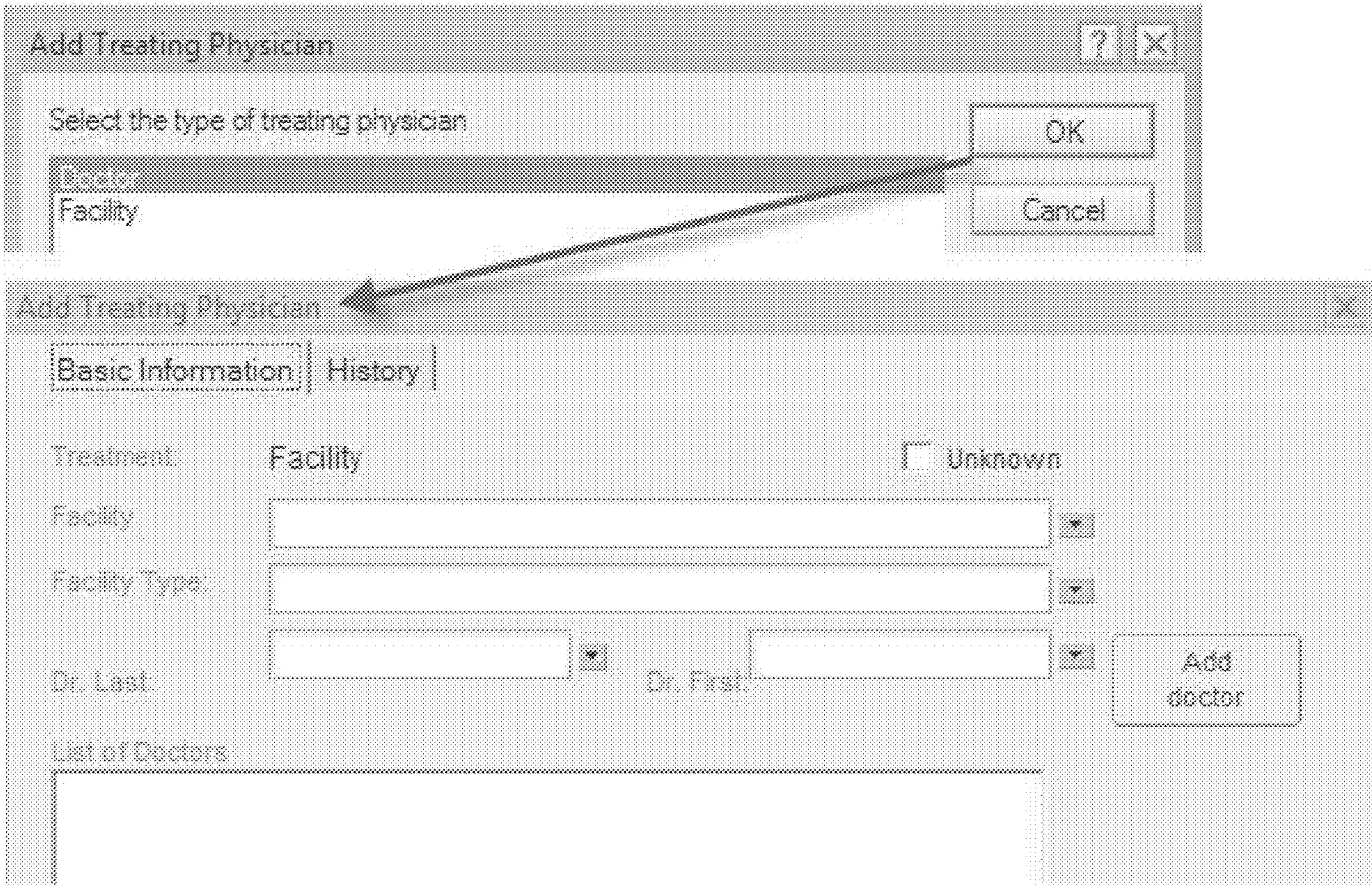


Fig. 233a

After the user double clicks on an existing Doctor or Facility, the following window appears so that the user may edit that Doctor or Facilities information.

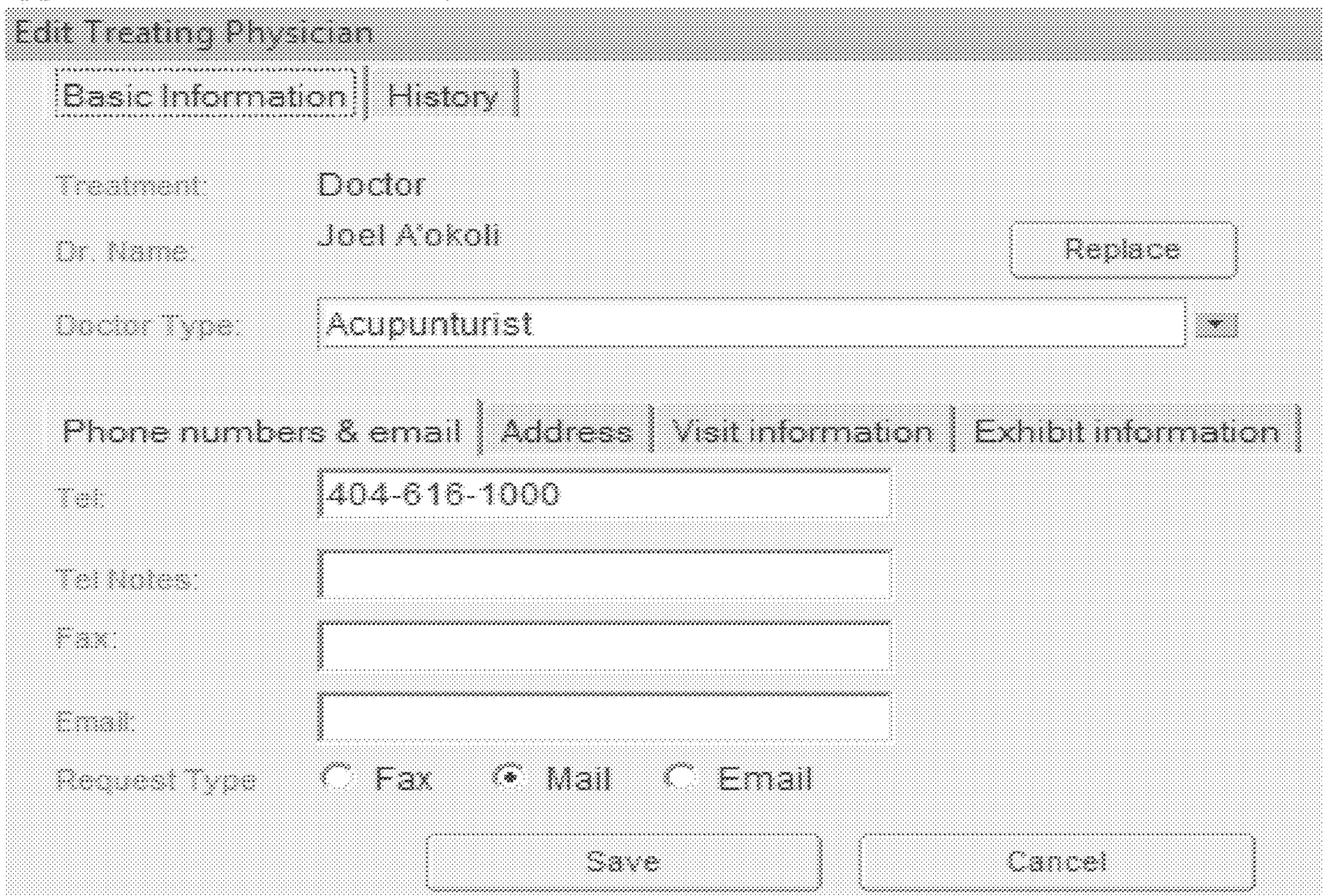


Fig. 233b

The user may add or edit the Medical Conditions list.

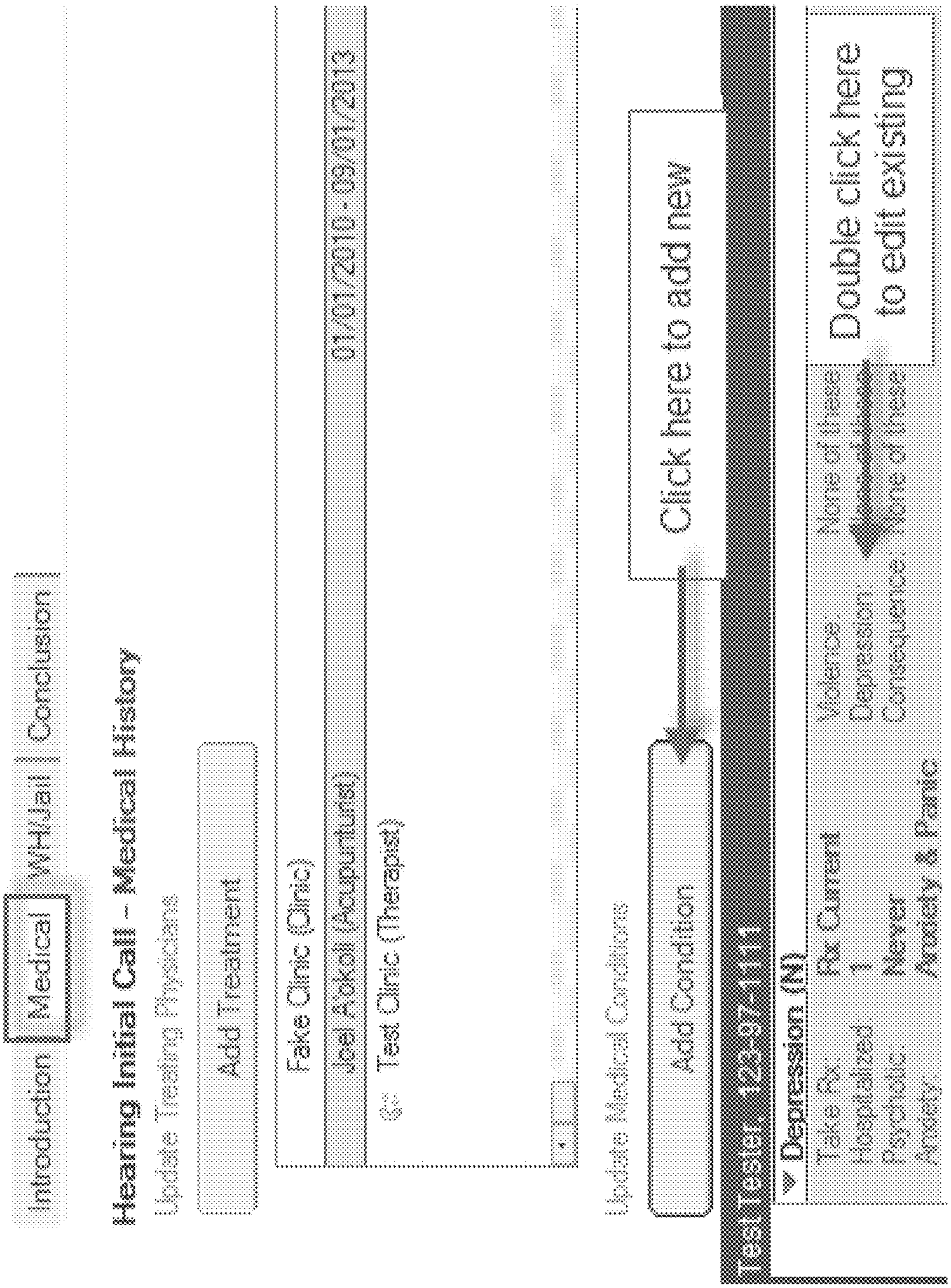


Fig. 234

Medical Conditions List:

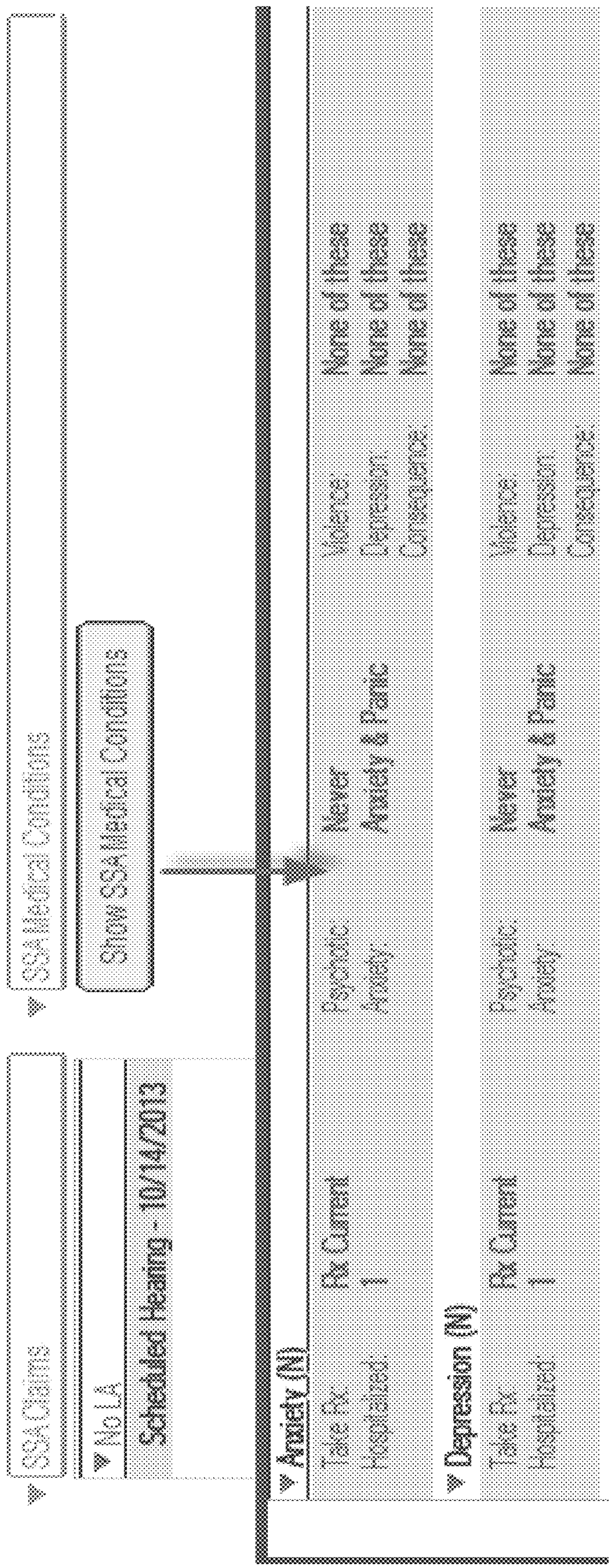


Fig. 235a

When the user clicks "Add Condition" this window appears allowing the user to add a Medical Condition to the list.

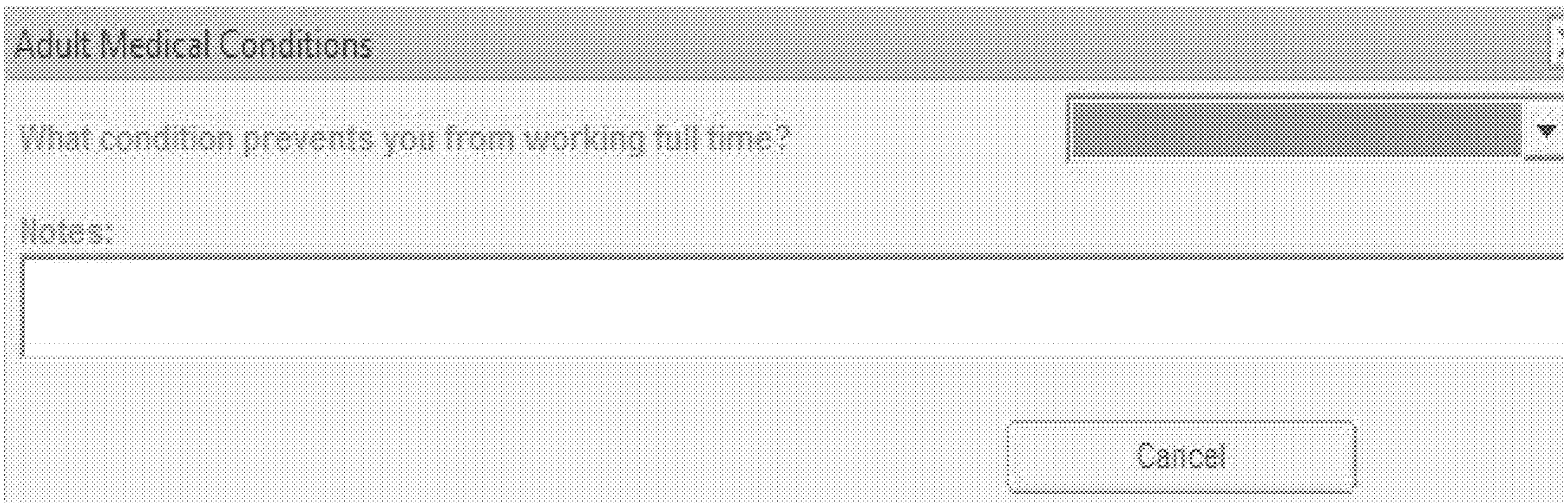


Fig. 235b

The user can select the right click action "Open Medical Condition" on an existing condition. This window appears allowing the user to edit that Medical Condition.

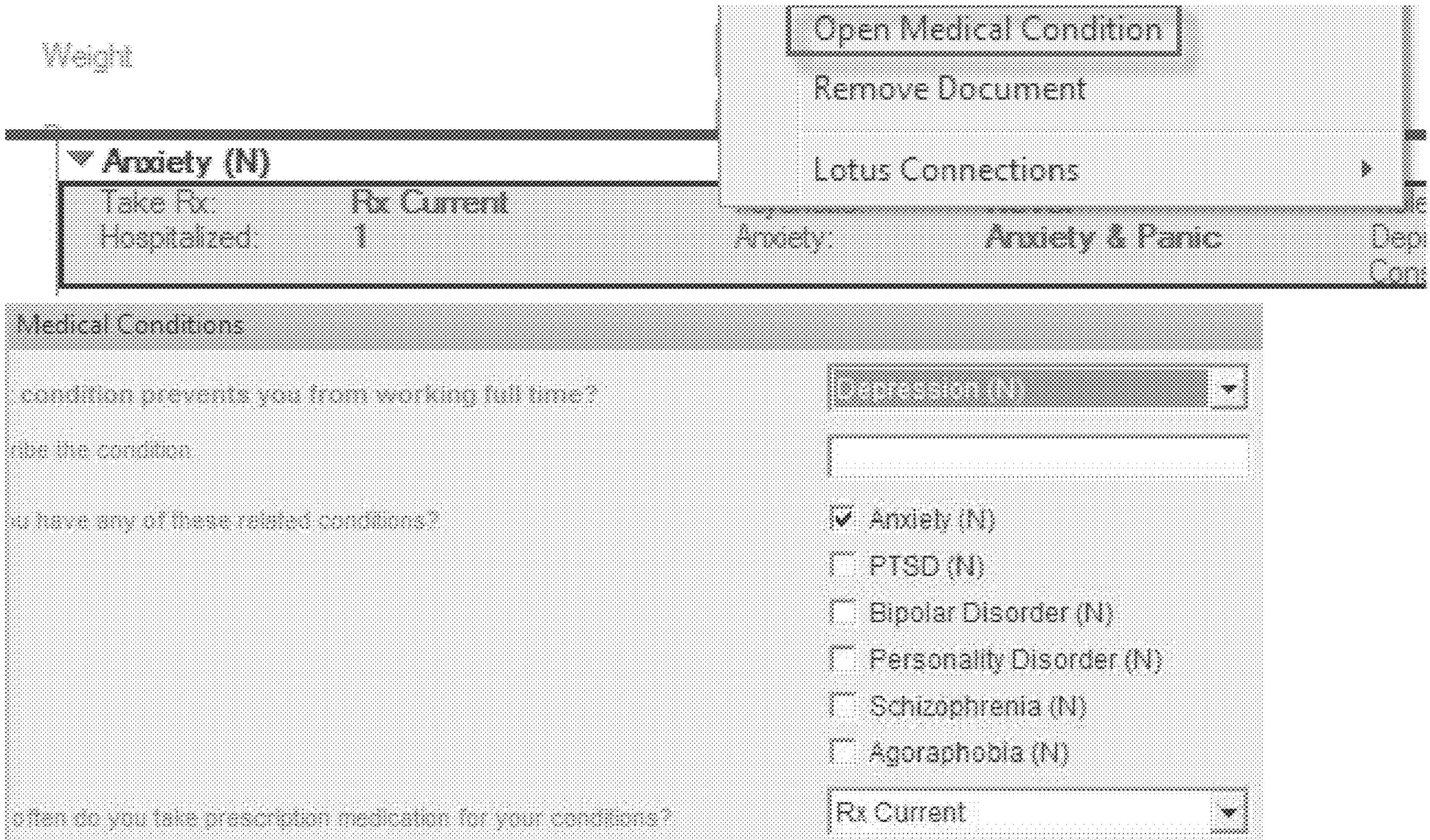


Fig. 236

The user may add to and edit the Prescription list from this window

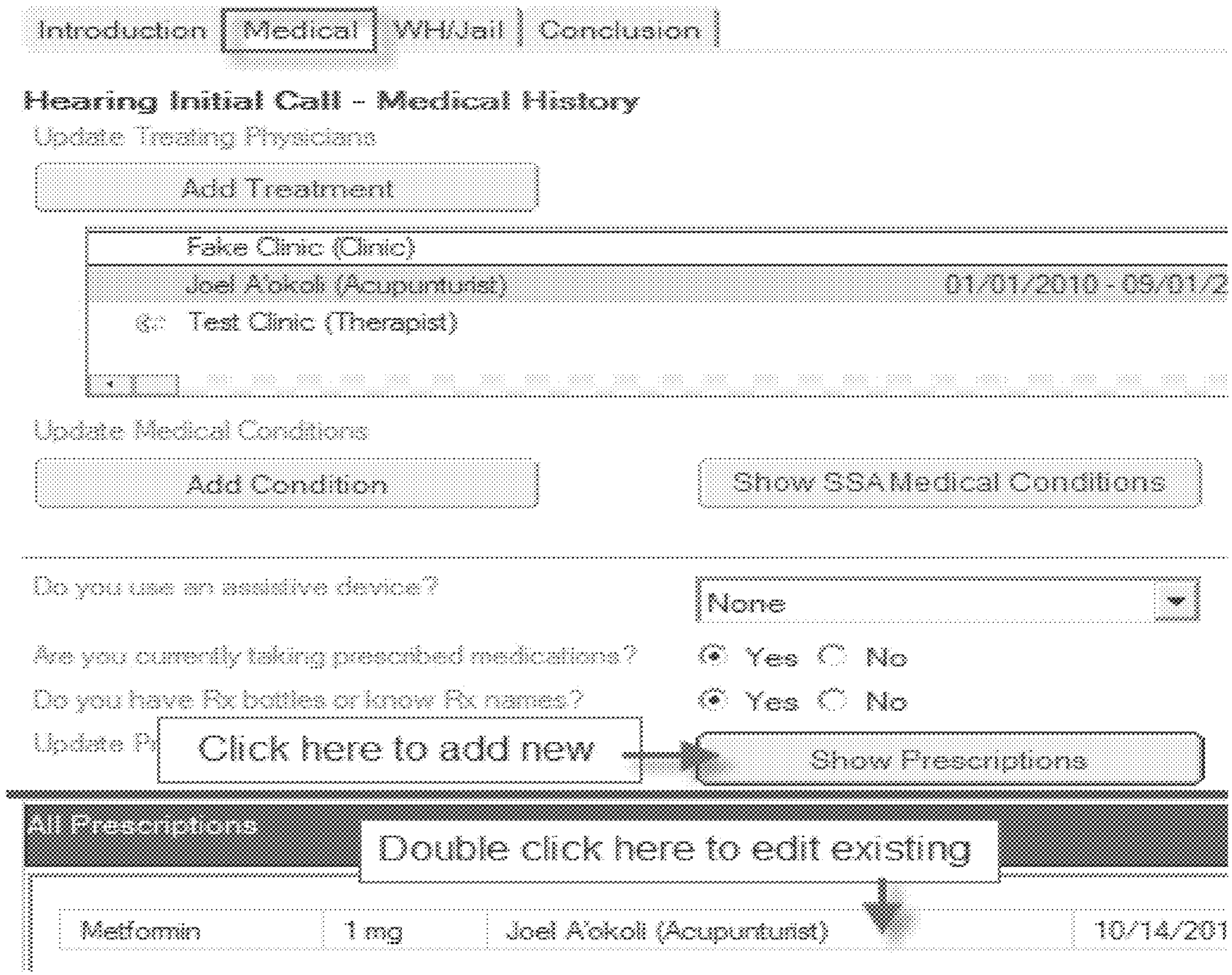


Fig. 237

Prescription List:

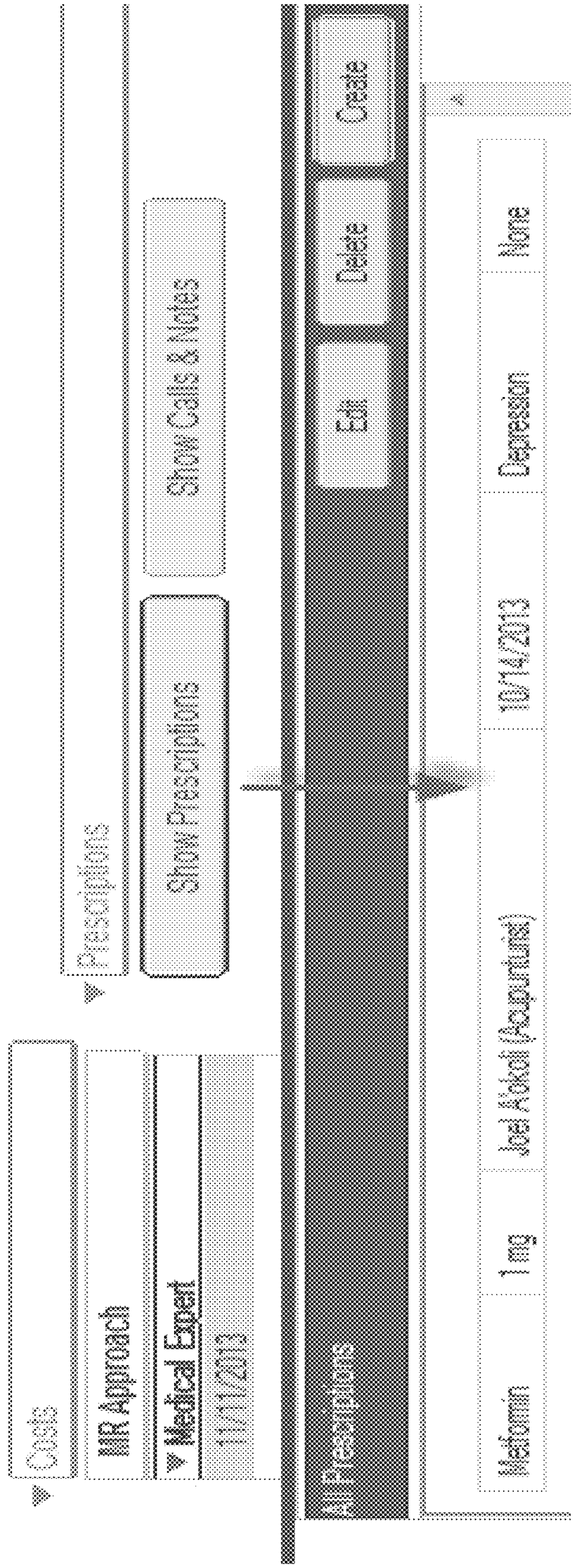


Fig. 238a

When the user clicks "Add Prescription" this window will appear so that the user may add a new prescription to the list.

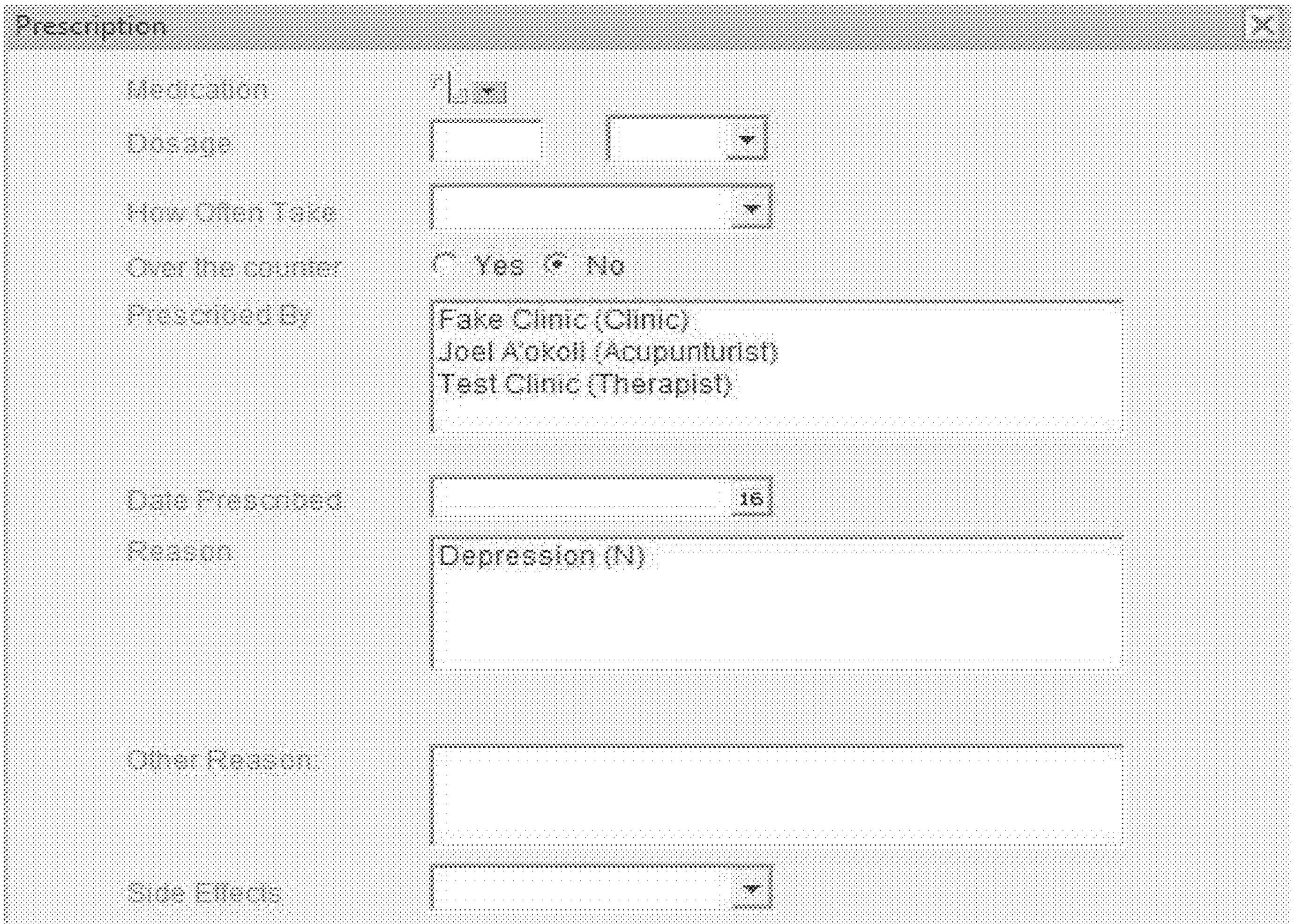


Fig. 238b

When the user double clicks an existing prescription, this window will appear so that the user may edit that prescription.

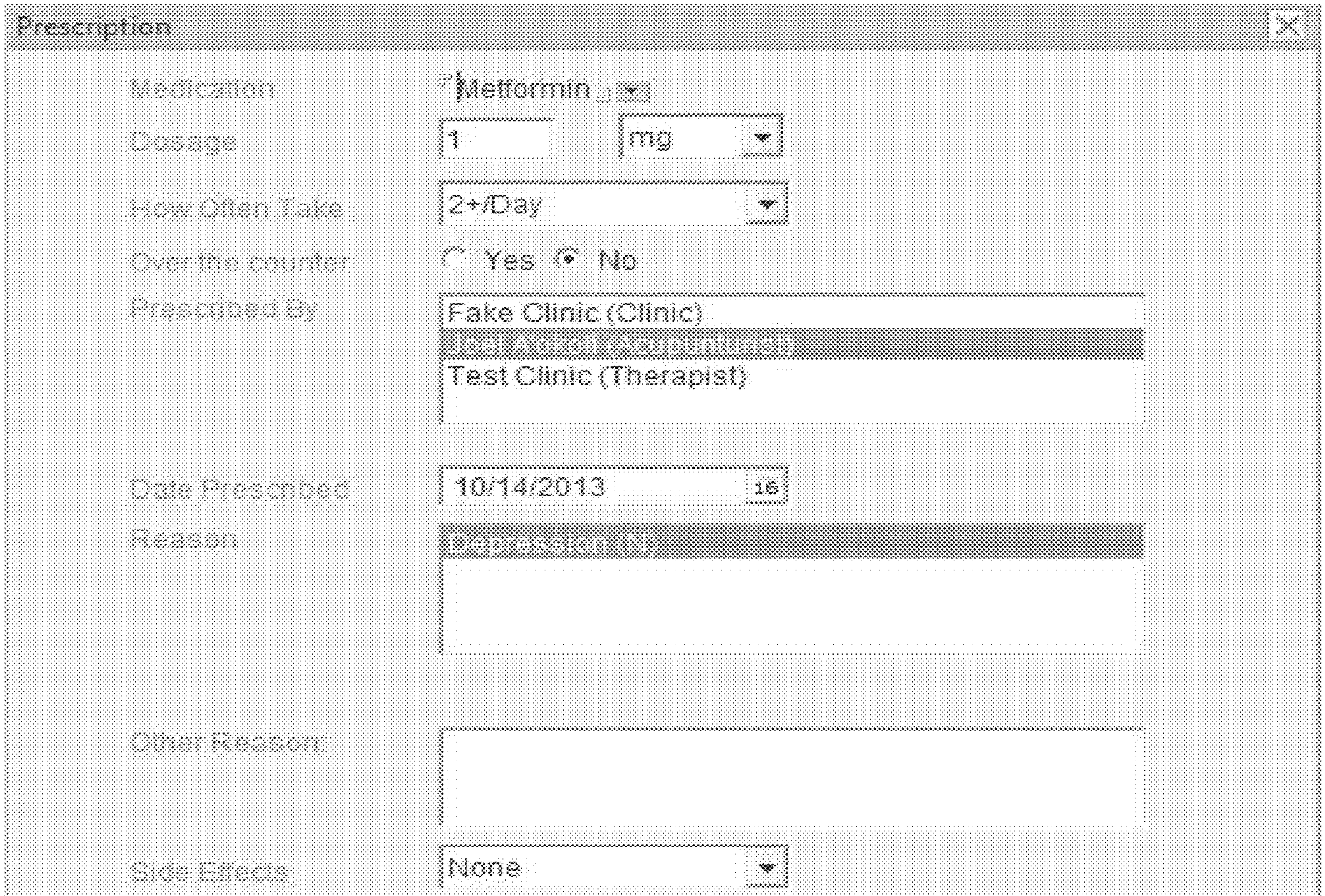


Fig. 239

The user may add to or edit the Job History list from this window

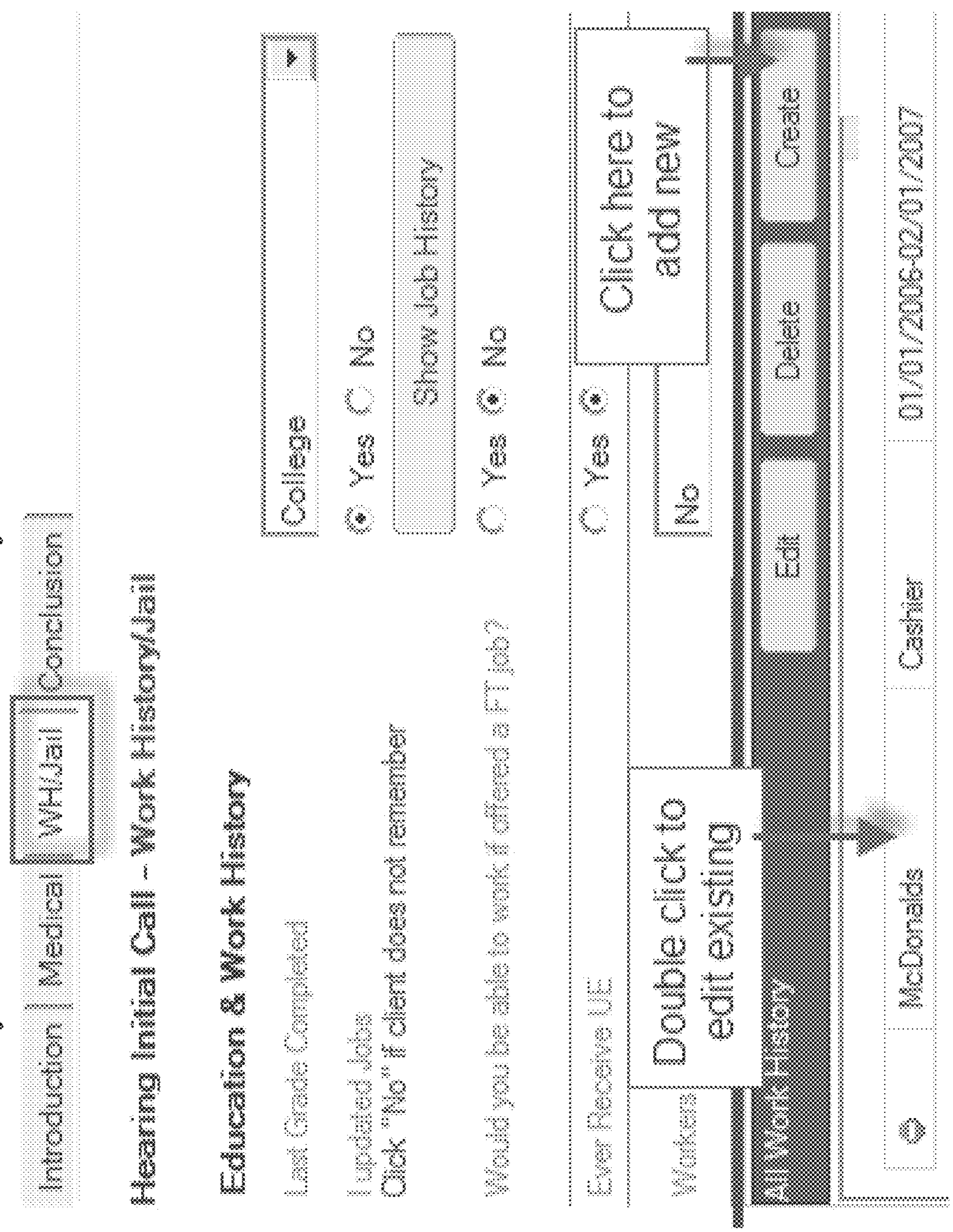


Fig. 240

Job History list:

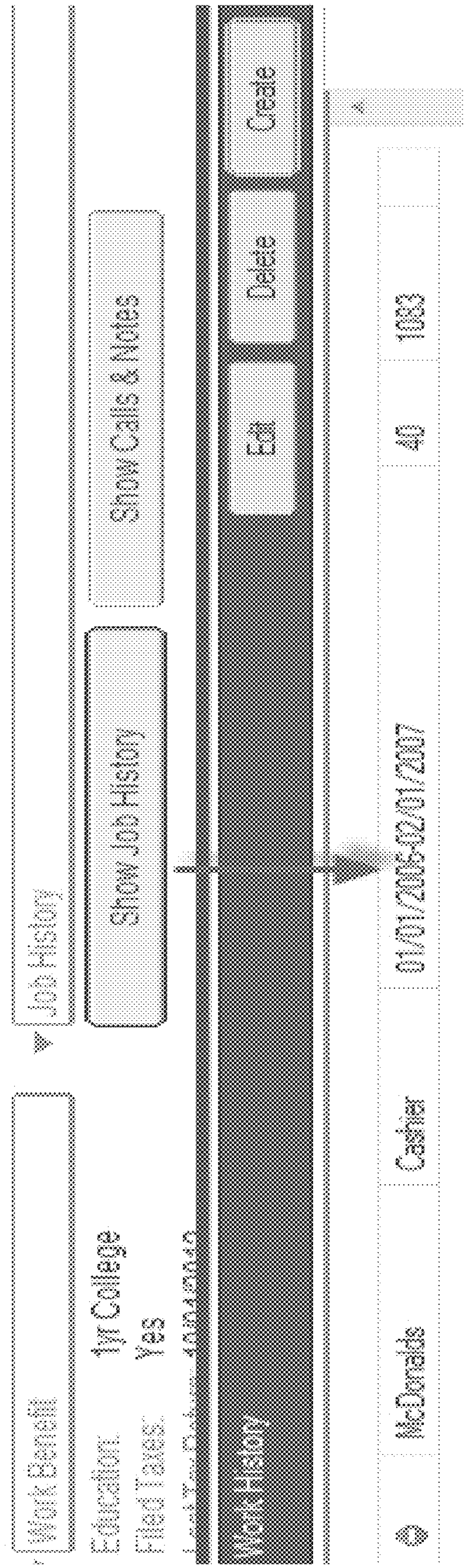


Fig. 241a

After user clicks "Add Job" this window will appear so that the user may add a new job to the list.

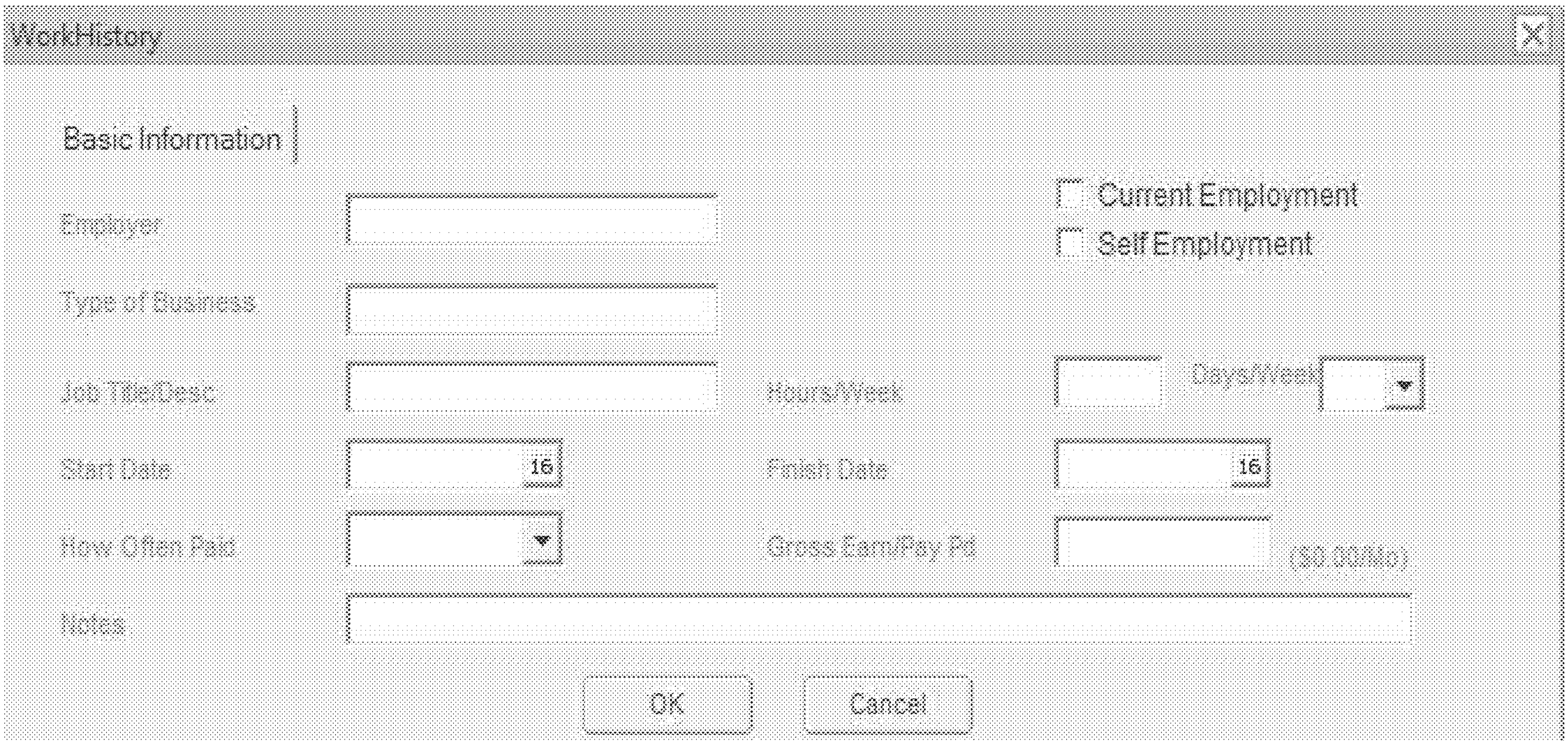


Fig. 241b

After user double clicks on an existing job, this window will appear so that the user may edit that job.

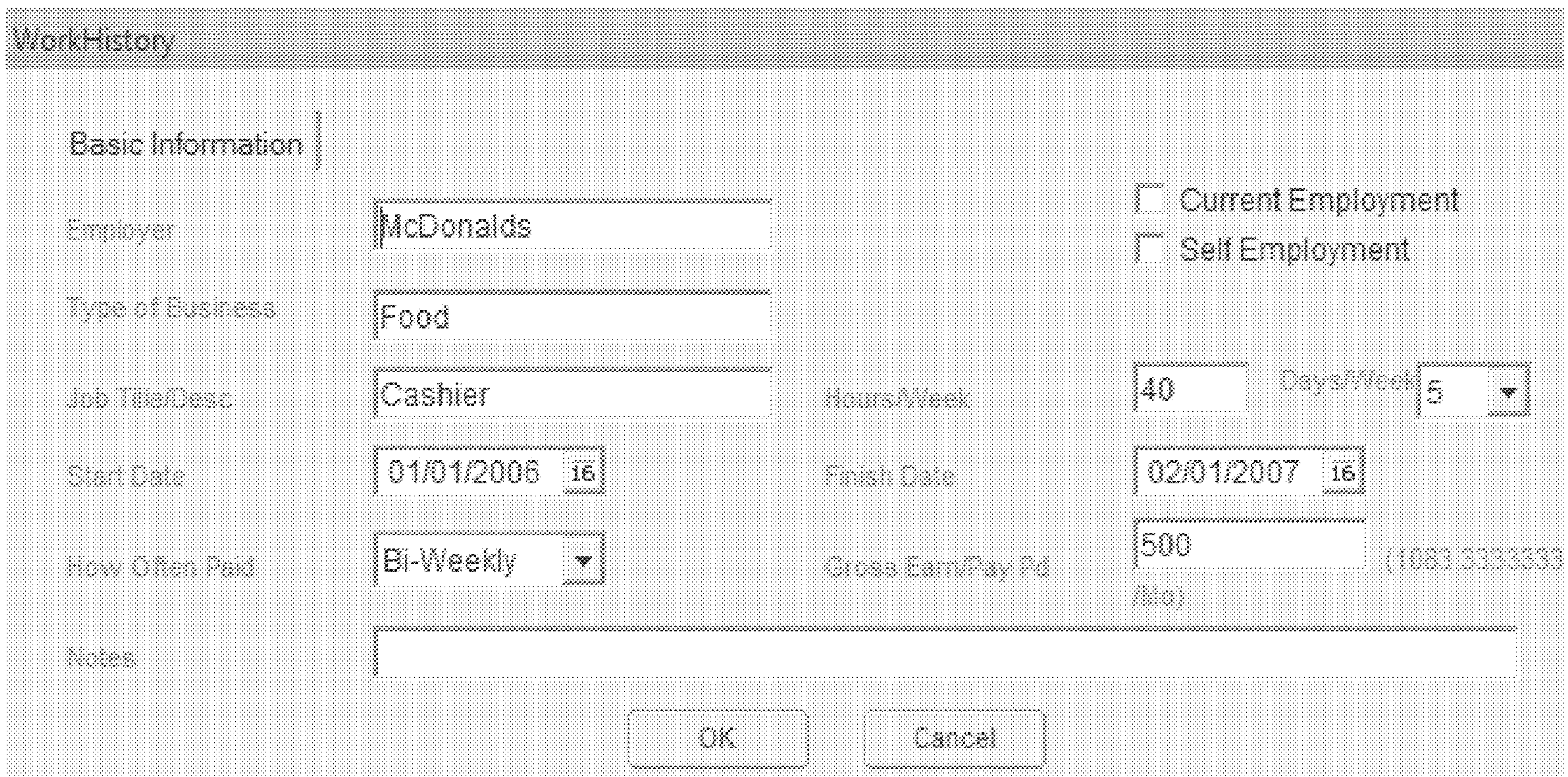
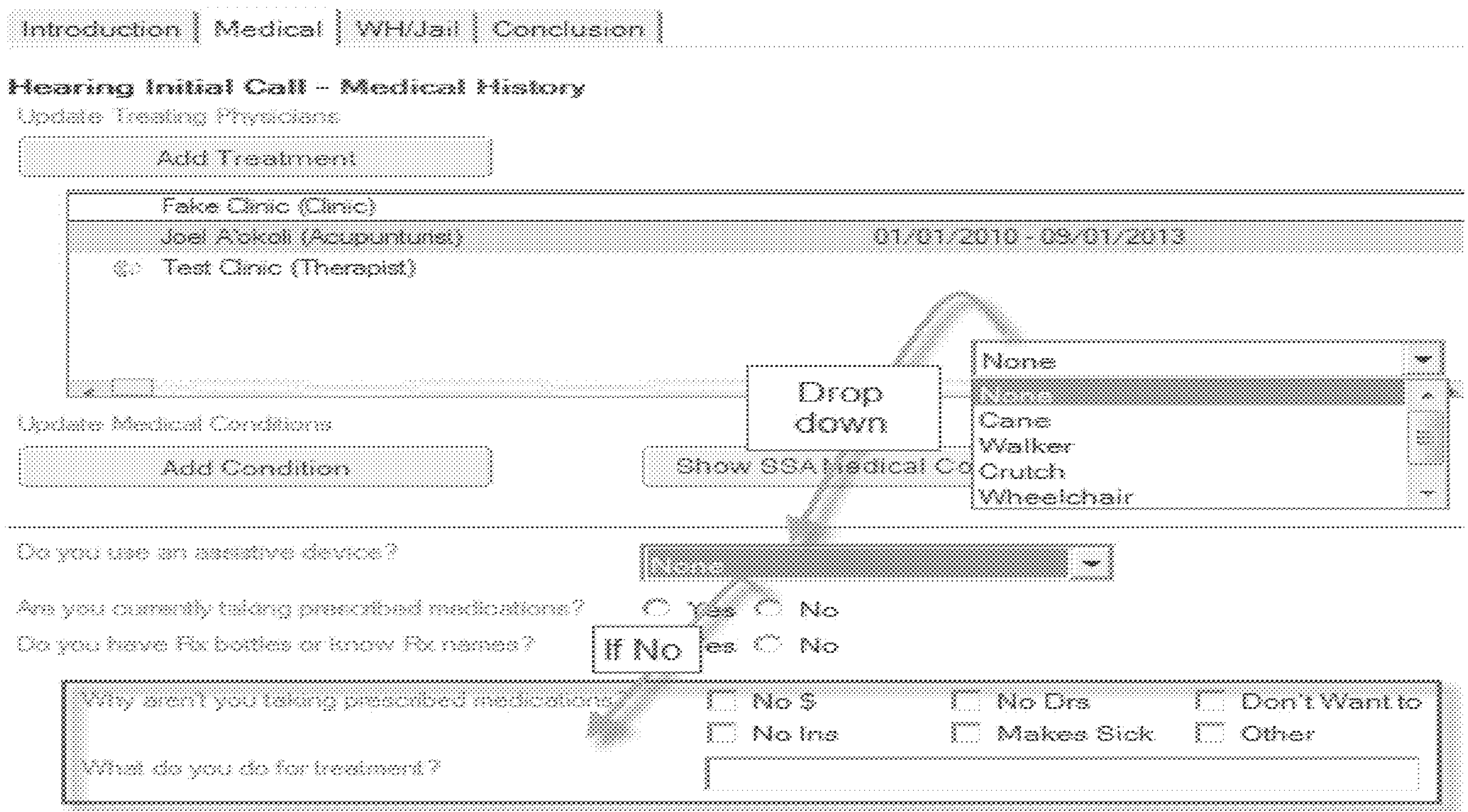


Fig. 242a

The following print screens show how questions may be answered in the edit window using a drop down, short answer or yes/no check box. They will also show how certain answers prompt the system to ask follow up questions, if the answer does not require follow up questions they remain hidden.



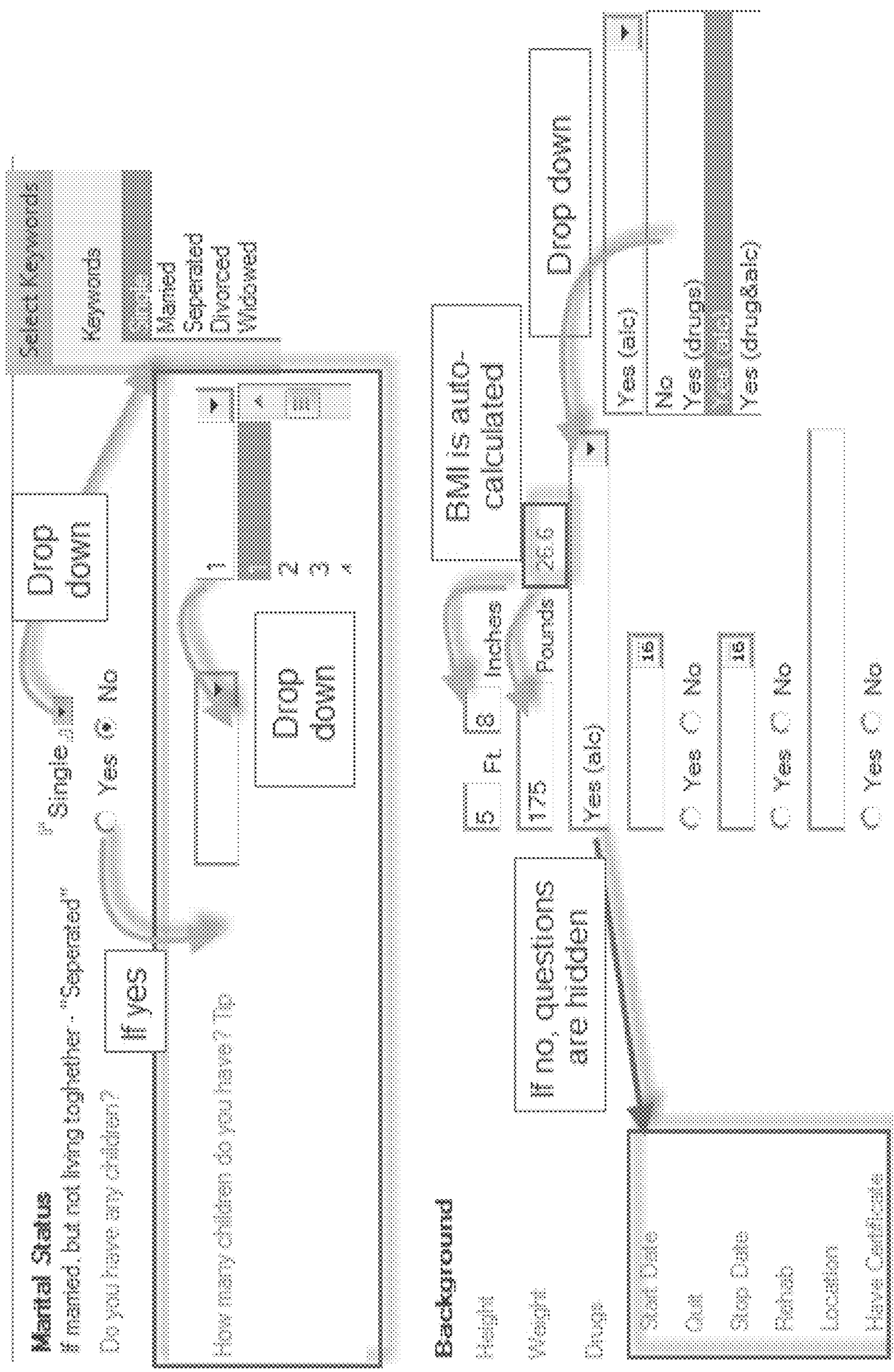


Fig. 242b

Medical Tab (Continued):

Fig. 243

Medical Tab (Continued):

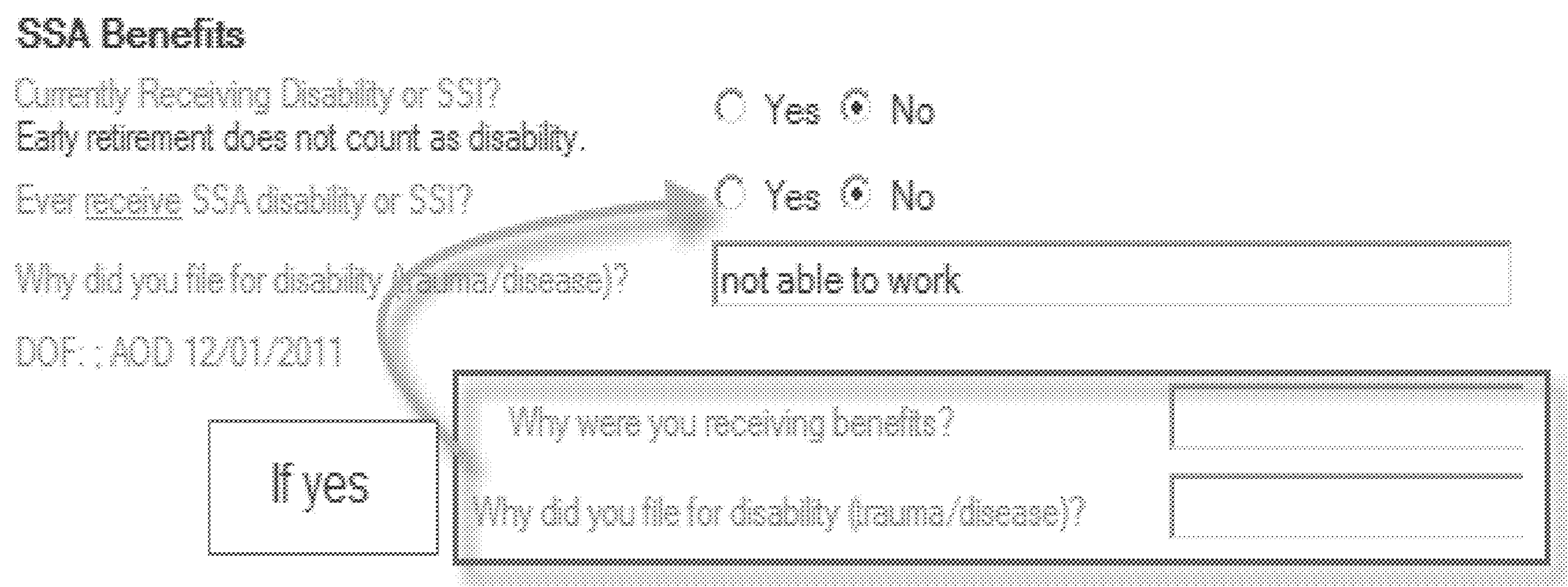


Fig. 244

WH/Jail tab:

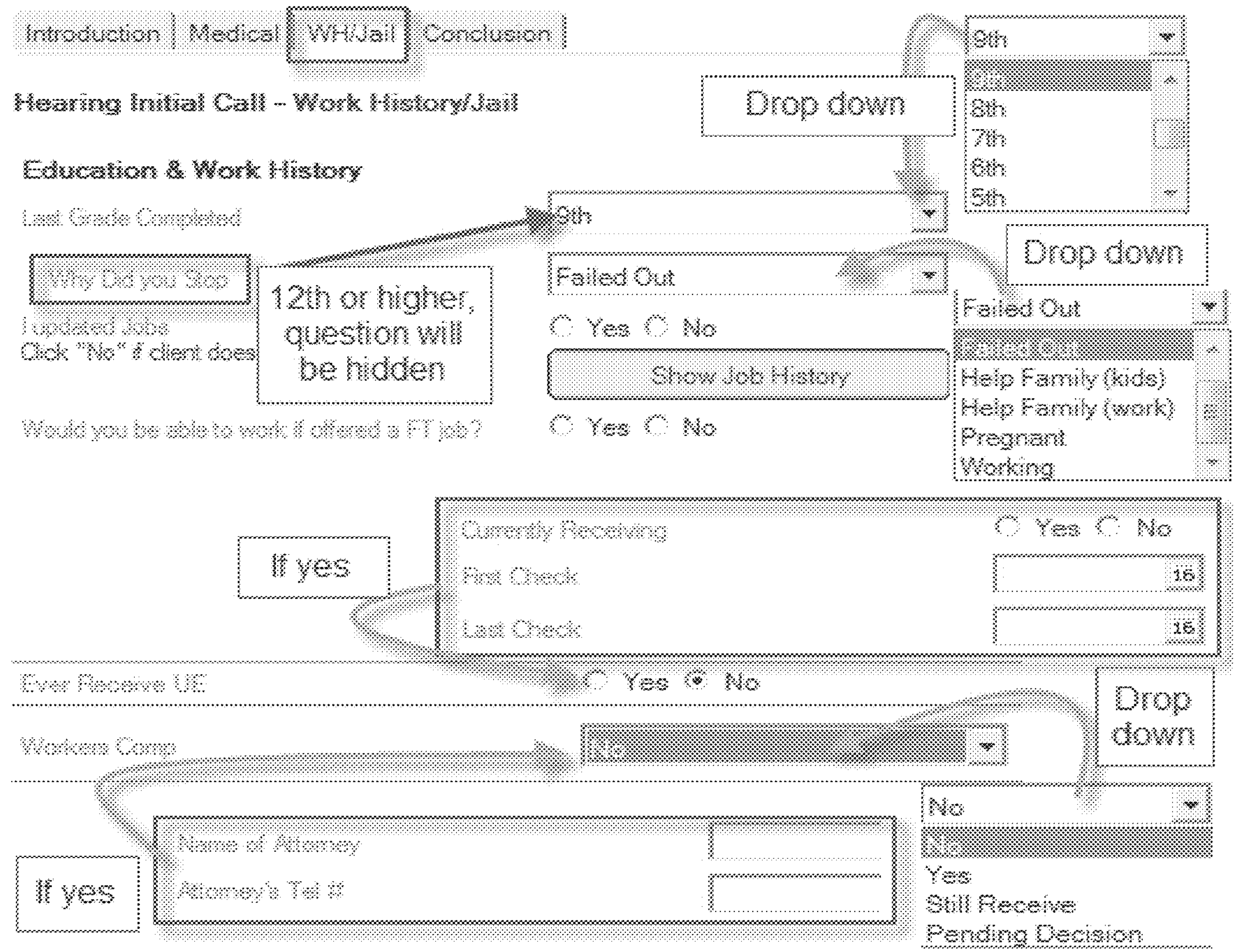


Fig. 245

WH/Jail tab (Continued):

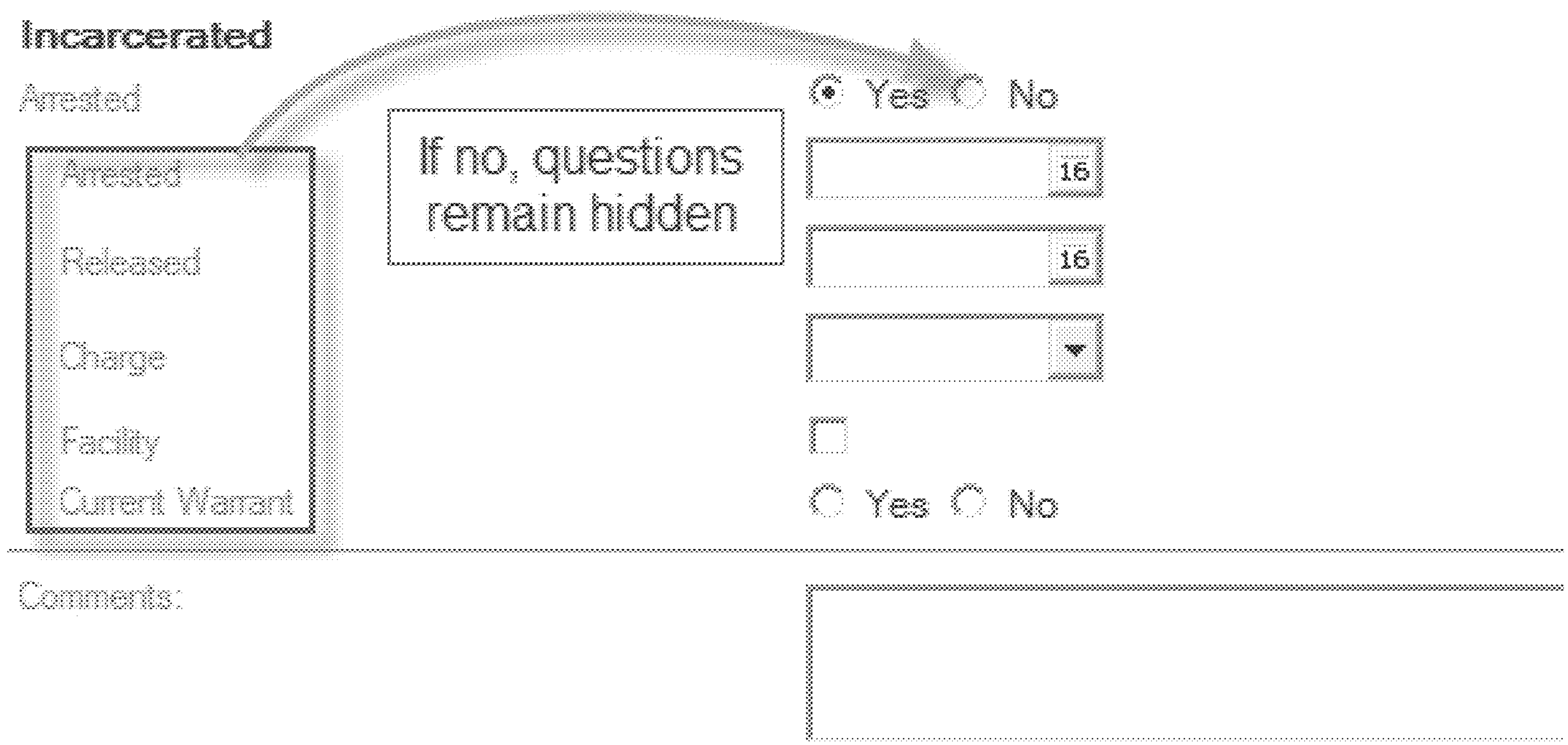


Fig. 246a

SSA Hearing Views - Case Developers

The Case Developers view is used by the Case Developers to keep track of the client's that have a Claim Status of Scheduled Hearing or are Ready to Schedule (RTS). The Case Developers summary prioritizes, organizes, and tracks these clients' cases as well as provides a quick view of what tasks are pending.

The Case Developers view is accessed by clicking on SSA: Hearing > "Case Developers"

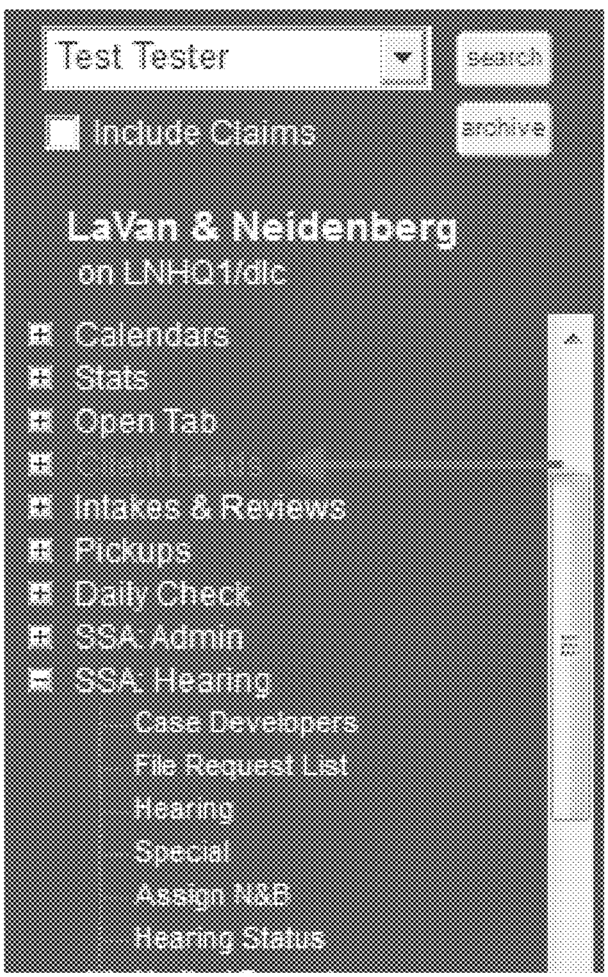


Fig. 246b

The system organizes all contacts that have an LA field of 6005-Pink, 6006-Yellow, 6015-Blue and a claim status of Scheduled Hearing or RTS on the Case Developer view.

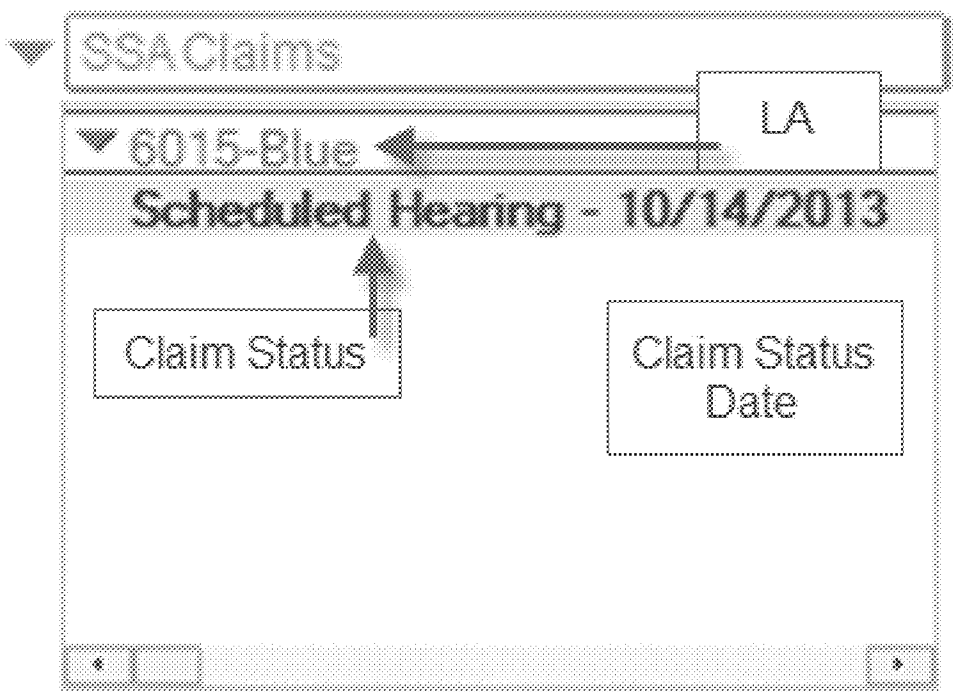
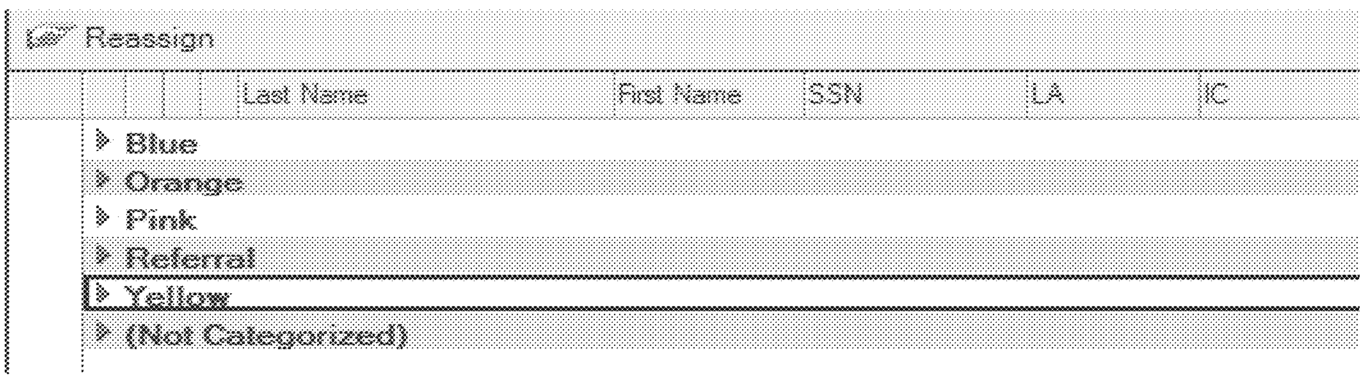


Fig. 247

The Case Developers view has sub-categories that divide the list by the LA field; each LA field indicates a separate Case Development team. This allows each Case Development team to focus only on the cases they are developing.



When a case is scheduled for a hearing, the system generally generates a File Status, which identifies which workflow to start. The workflow guides the user through certain steps required to efficiently develop the file.

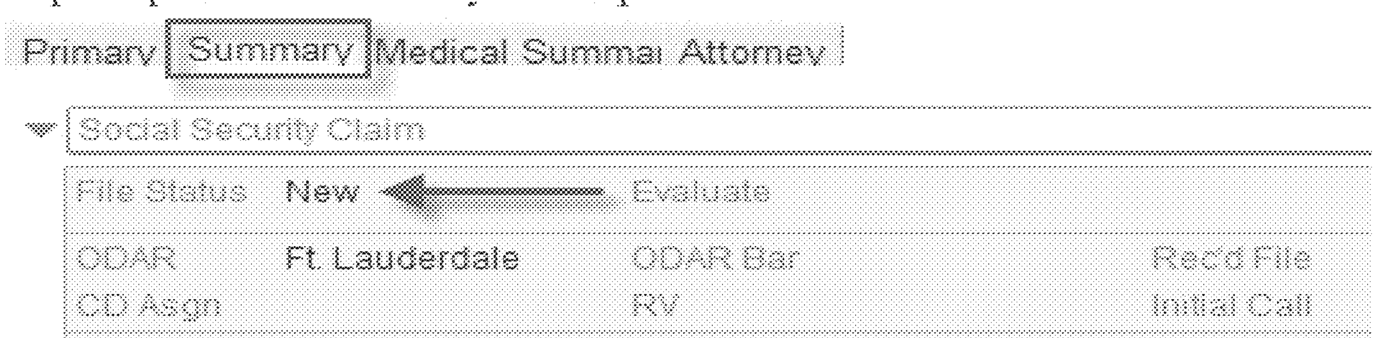
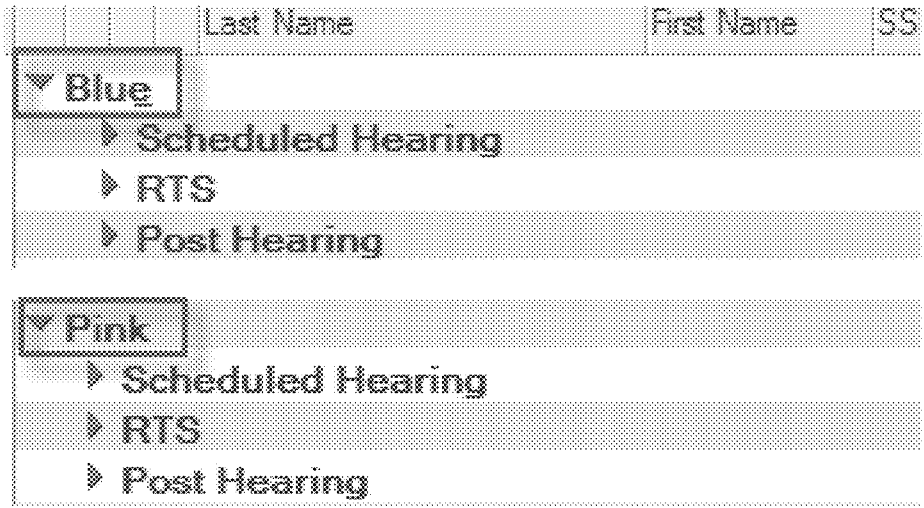


Fig. 248


Workflow:
Scheduled Hearing - 10/14/2013; 6015-Blue
-Not assigned-
Special
CD
Special
Primary
Summary
Medical Summai
Attorney
Social Security Claim
File Status
New
Evaluate
ODAR
Ft. Lauderdale
ODAR Bar
Rec'd
CD Asgn
RV
Initial
PFD
Type:
Prior
For Claim
Description
Assignee
Date Assign
CD > New - 11/25/2013 03:06:35 PM
Opening
11/25/2013

Fig. 249

Each LA Field sub-category is further broken down by Claim Status sub-category, Scheduled Hearing, RTS, etc.



Each Claim Status is further broken down by the Claim Status Date, in ascending order.

Fig. 250

The following print screen illustrates the Yellow team (LA field is 6006-Yellow), Claim Status is Scheduled Hearing and Claim Status Date is 12/4/13.

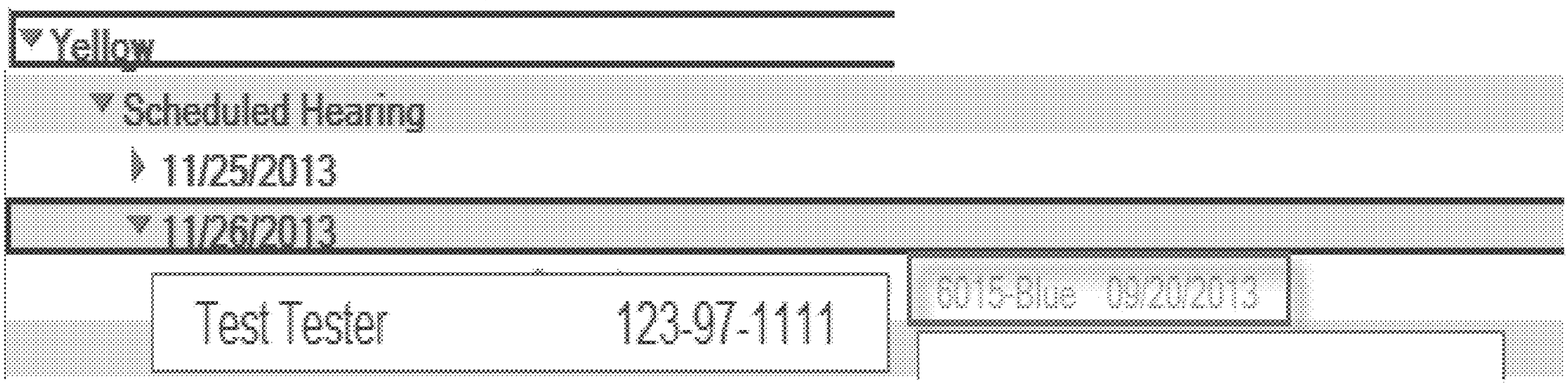


Fig. 251

The user may access a client's contact page from the Hearing Summary.

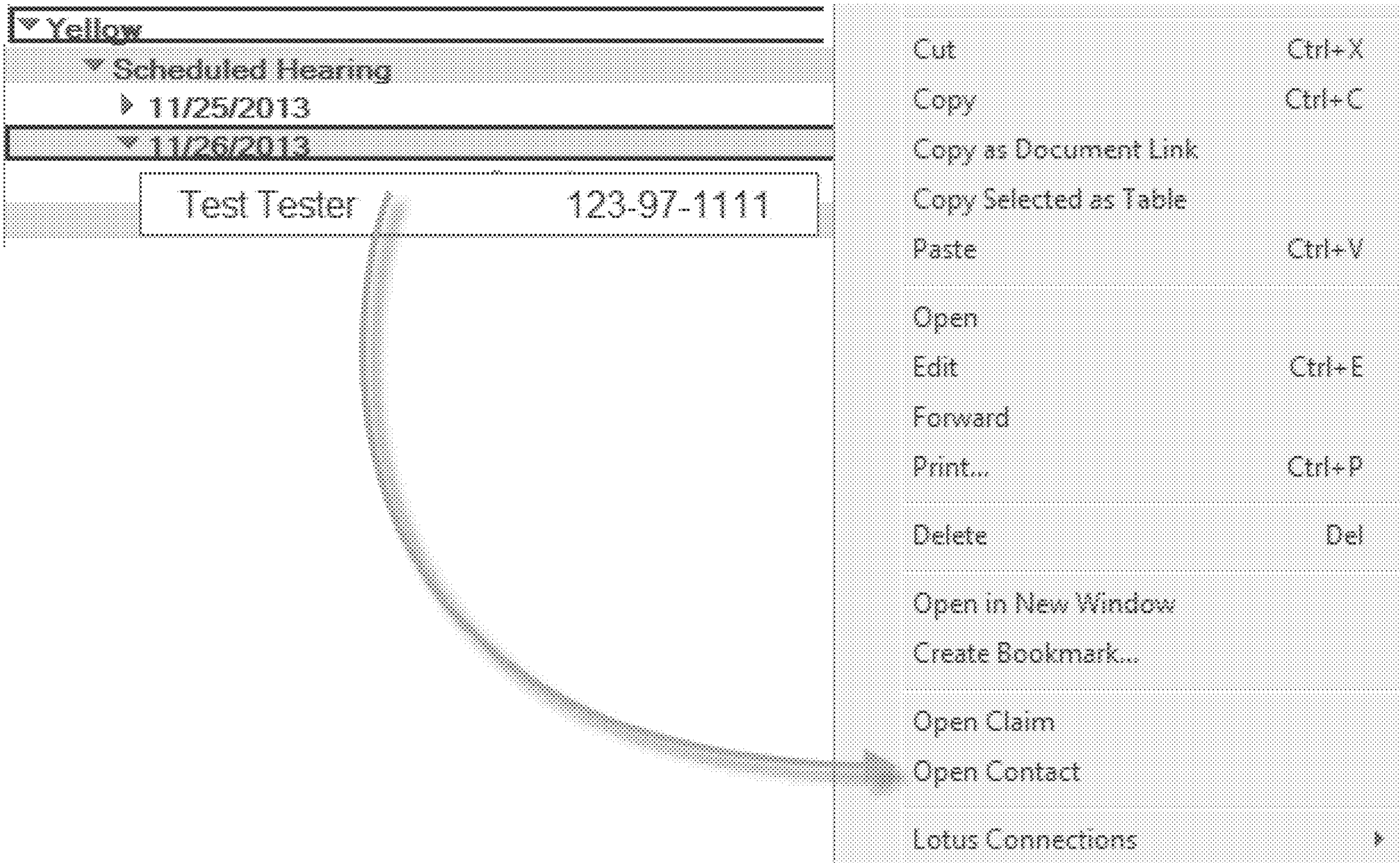


Fig. 252

The following print screen shows the Case Developer view. The columns display critical information from the client's Contact page so the user can quickly assess and work on the client's case.

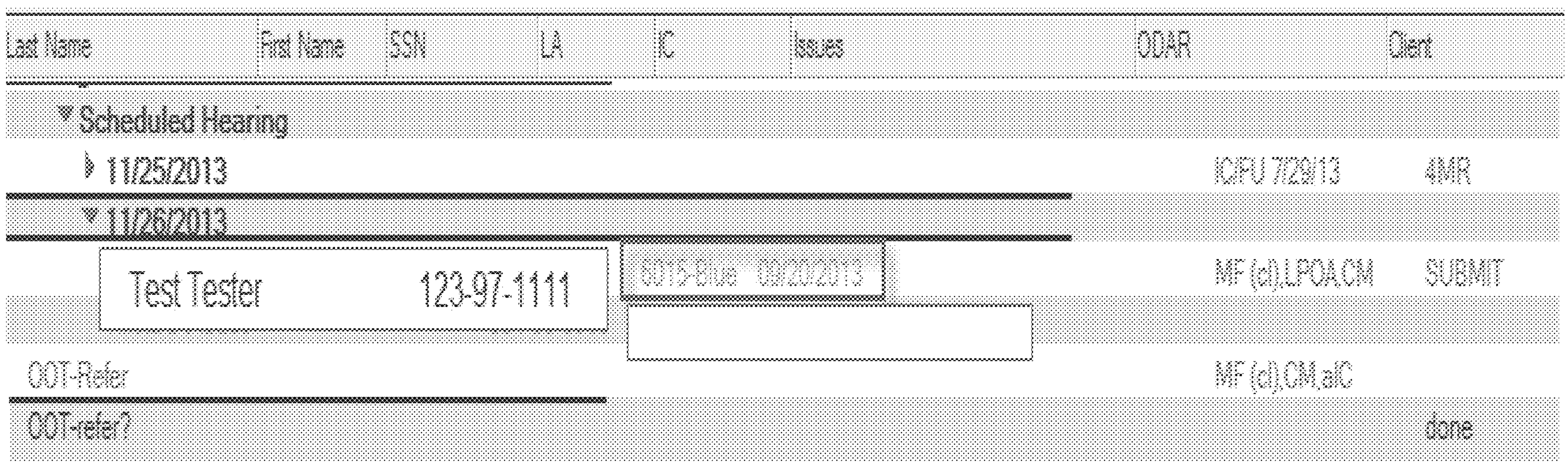
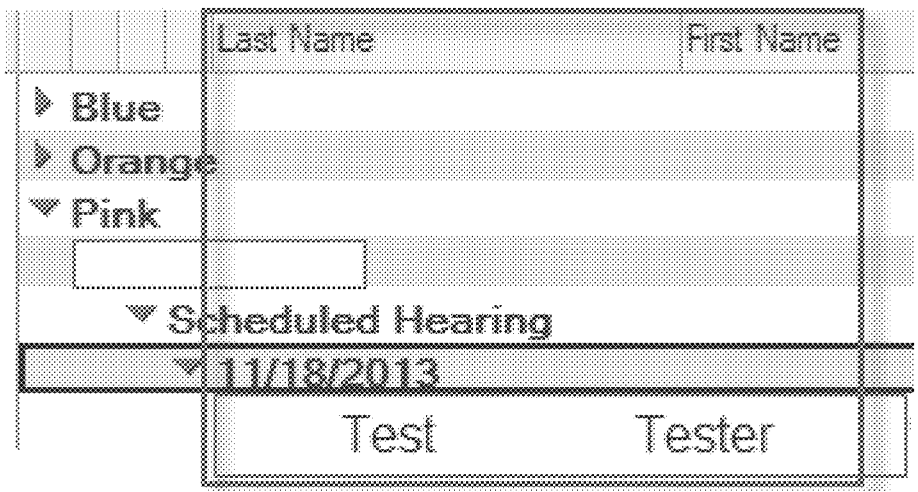


Fig. 253

The following print screens will illustrate where each column gets its information.

Name:



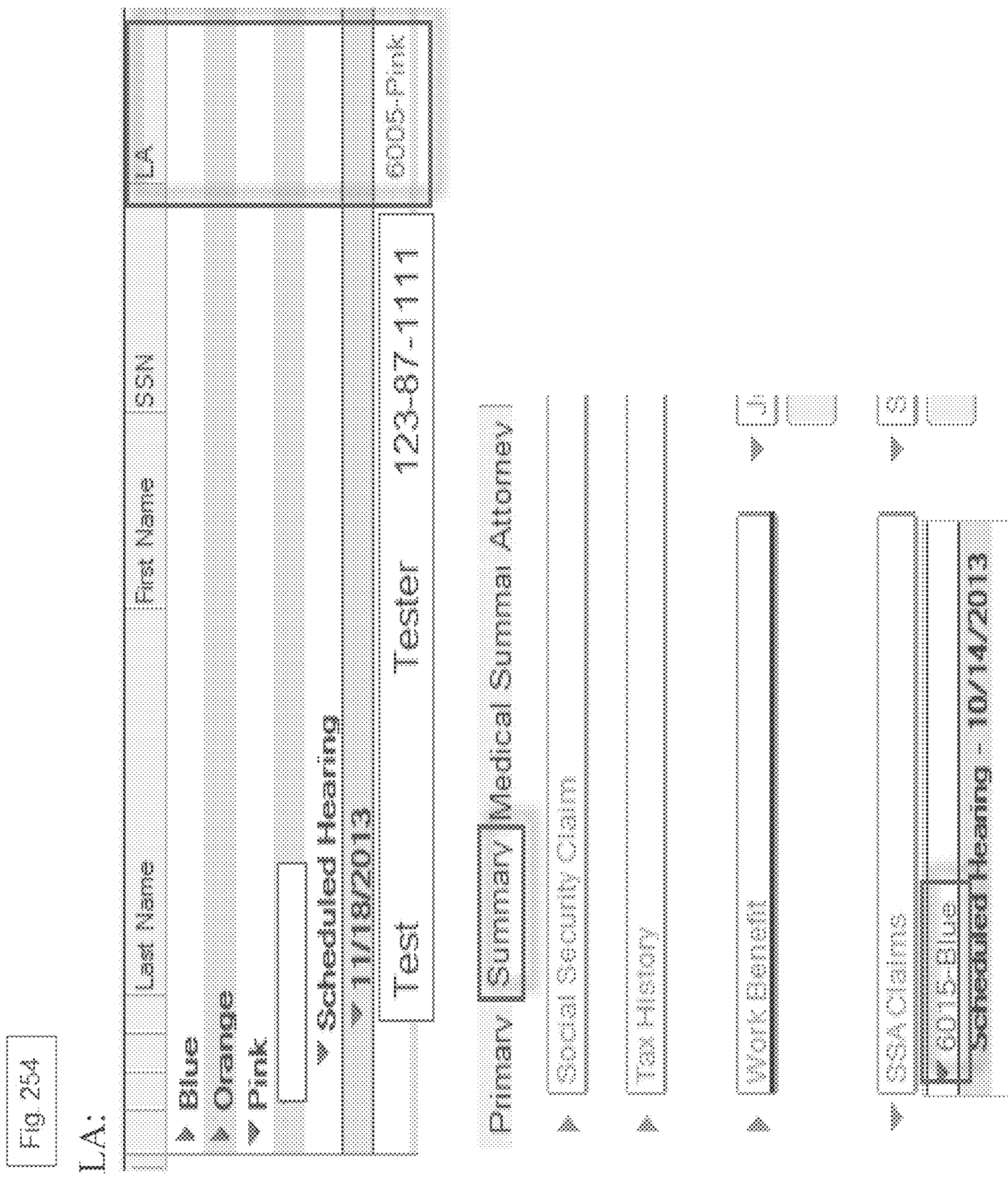


Fig 254
LA:
Last Name
First Name
SSN
LA
Blue
Orange
Pink
Scheduled Hearing
11/18/2013
6005-Pink
Test
Tester
123-87-1111
Primary
Summary
Medical Summa
Attorney
Social Security Claim
Tax History
Work Benefit
SSA Claims
6015-Blue
Scheduled Hearing - 10/14/2013

Fig. 255a

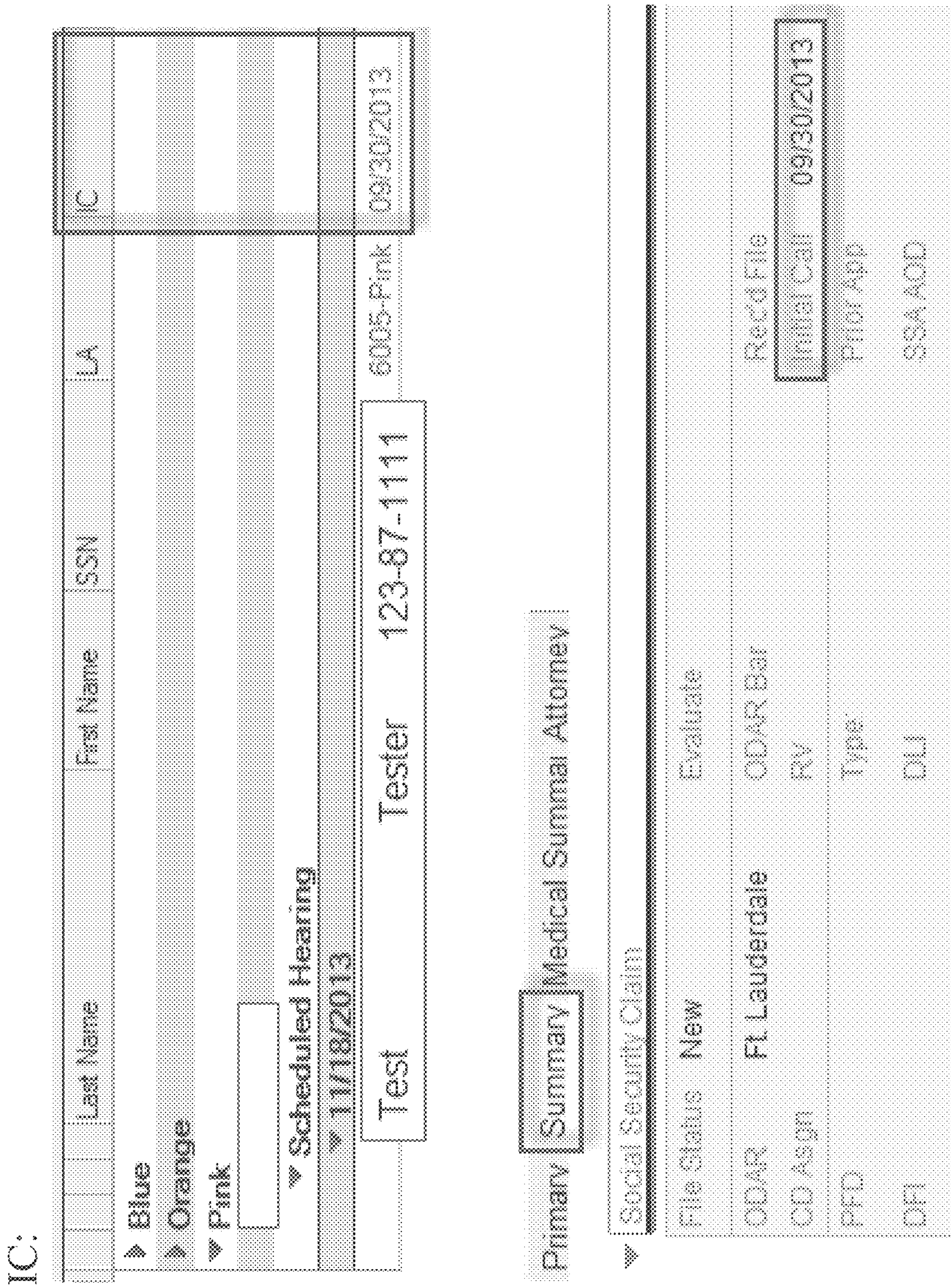

IC:
Last Name
First Name
SSN
LA
IC
Blue
Orange
Pink
Scheduled Hearing
11/18/2013
Test
Tester
123-87-1111
6005-Pink
09/30/2013
Primary
Summary
Medical Summary
Attorney
Social Security Claim
File Status
New
Evaluate
ODAR
Ft Lauderdale
ODAR Bar
Rec'd File
CD Asgn
RV
Initial Call
09/30/2013
PFD
Type
Prior App
DFI
DLI
SSA AOD

Fig. 255b

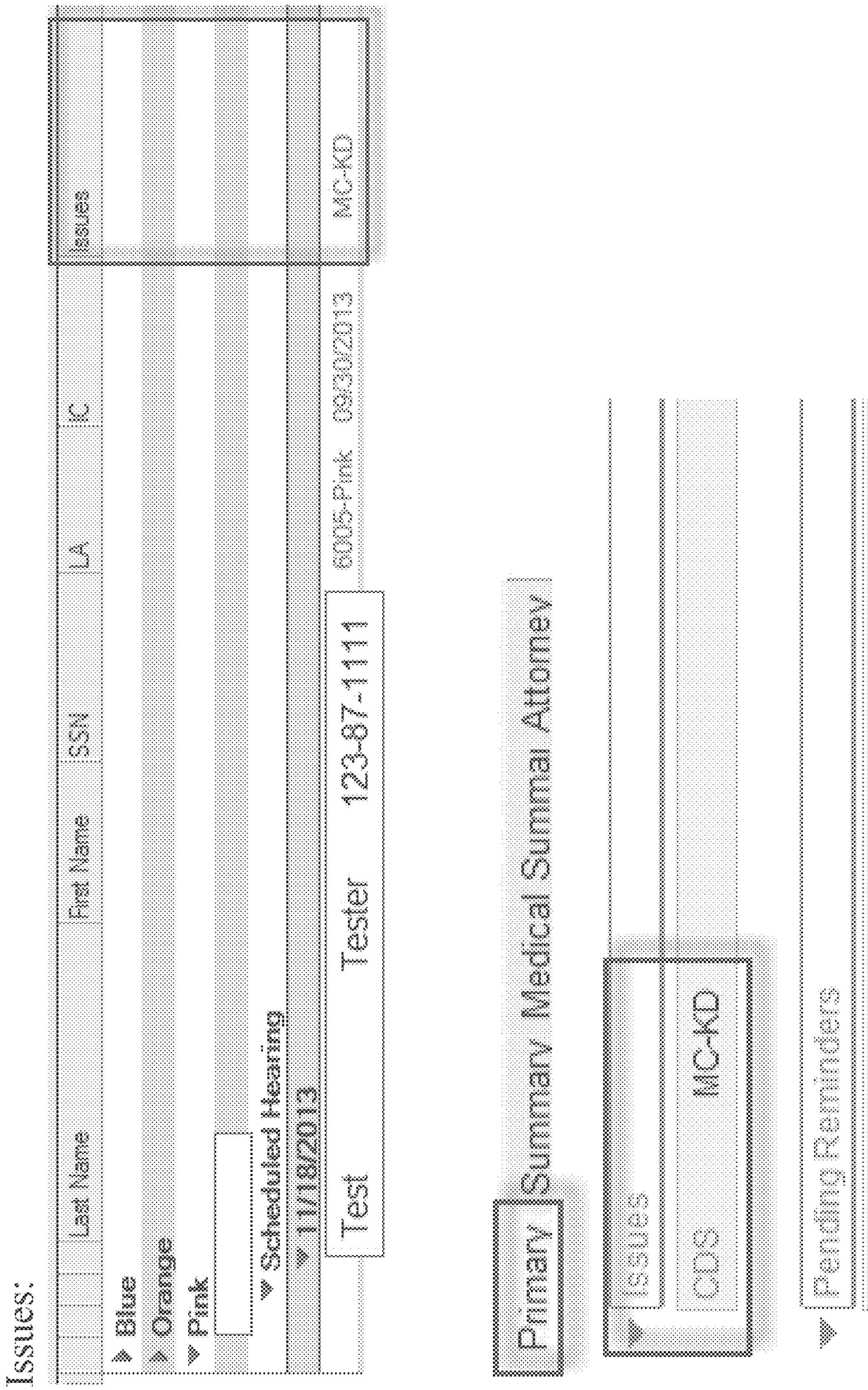

Issues:
Last Name
First Name
SSN
LA
IC
Issues
Blue
Orange
Pink
Scheduled Hearing
11/18/2013
Test
Tester
123-87-1111
6005-Pink
09/30/2013
MC-KD
Primary
Summary
Medical Summar
Attorney
Issues
CDS
MC-KD
Pending Reminders

Fig. 256

ODAR, Client, File:

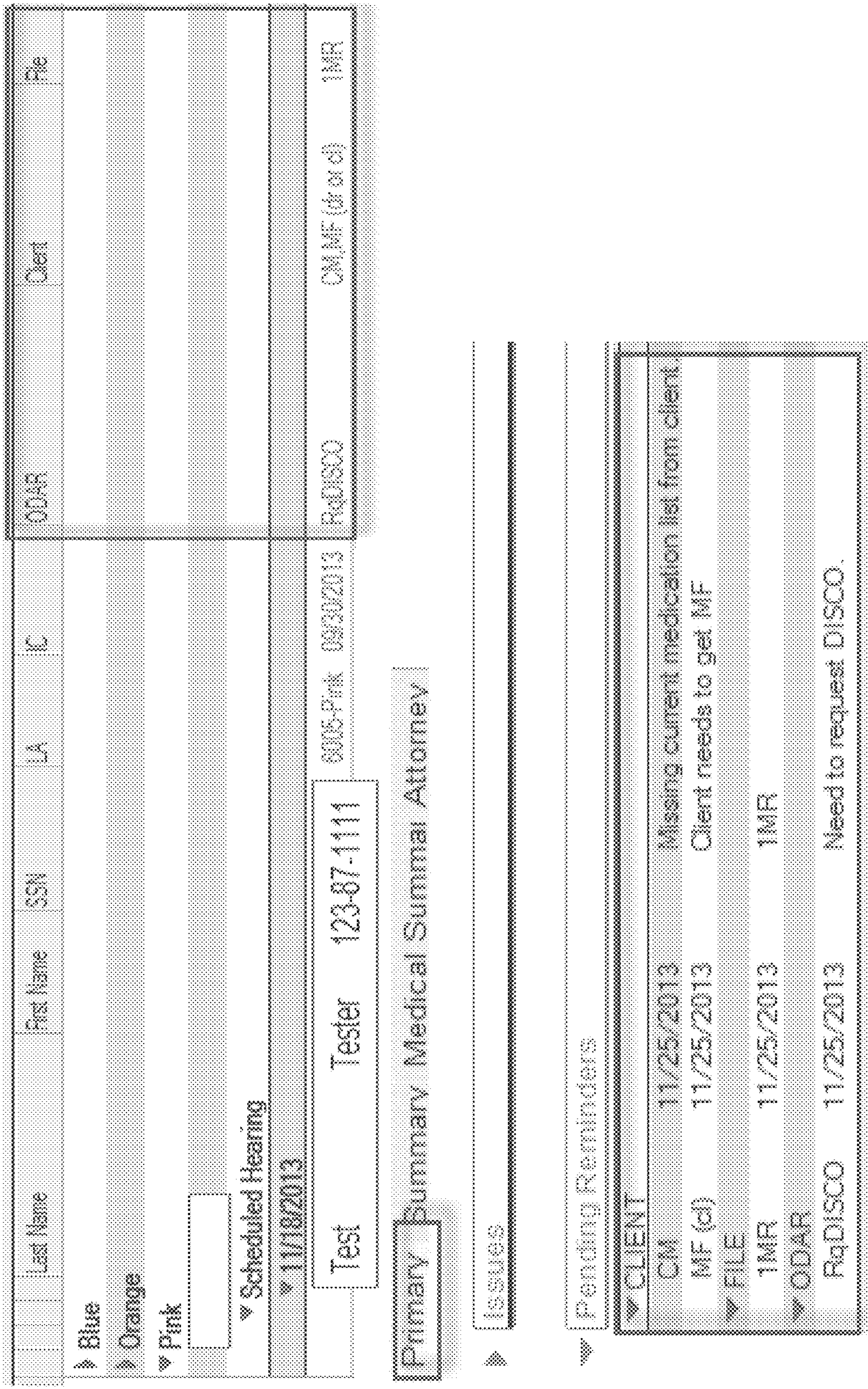


Fig. 257

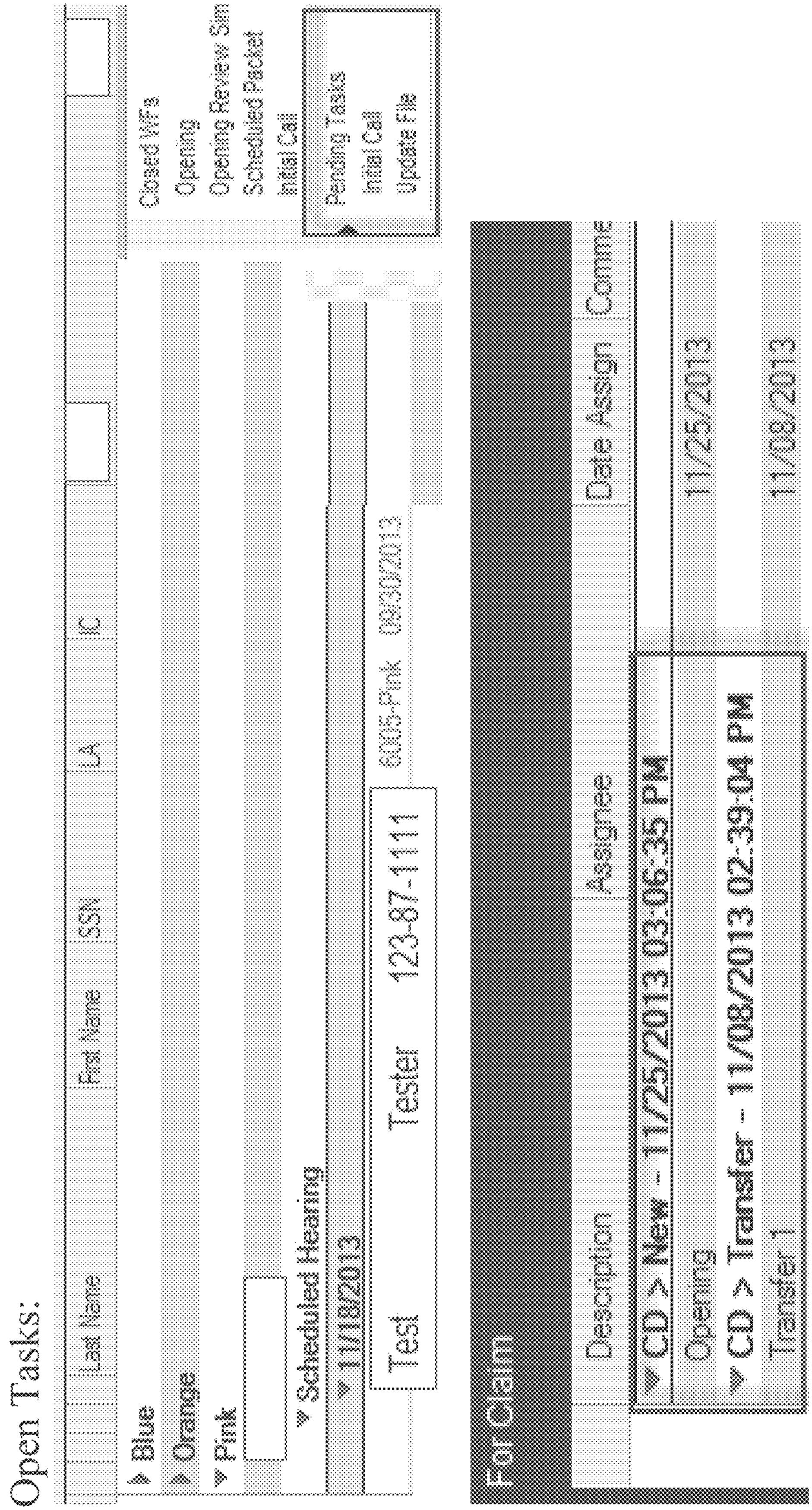
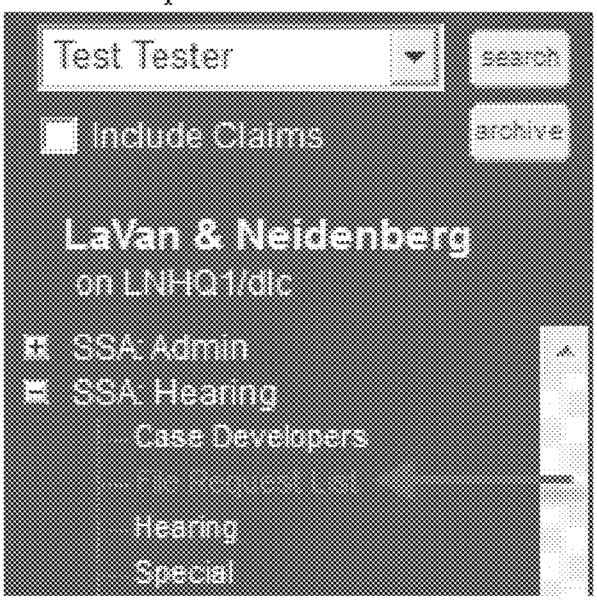

Open Tasks:
Last Name
First Name
SSN
LA
IC
Blue
Orange
Pink
Scheduled Hearing
11/18/2013
Test
Tester
123-87-1111
6005-Pink
09/30/2013
Closed WFs
Opening
Opening Review Sim
Scheduled Packet
Initial Call
Pending Tasks
Initial Call
Update File
For Claim
Description
Assignee
Date Assign
Comme
CD > New - 11/25/2013 03:06:35 PM
11/25/2013
Opening
CD > Transfer - 11/08/2013 02:39:04 PM
Transfer 1
11/08/2013

Fig. 258

File Request List

The File Request List is used to organize and track the Client Files that have been added and need to be requested. These files are required to complete the development of each client's case.

The File Request List is accessed by clicking on SSA: Hearing > "File Request List"



The system places all contacts that have an LA of 6006-Yellow, 6005-Pink, or 6015-Blue on the File Request List.

Fig. 259a

The following print screen shows the File Request List; the columns in the red boxes show information from the client's contact page, mainly the Summary tab. The columns on this view show the most important information used to request an Exhibit File, which allows the user to work more efficiently.

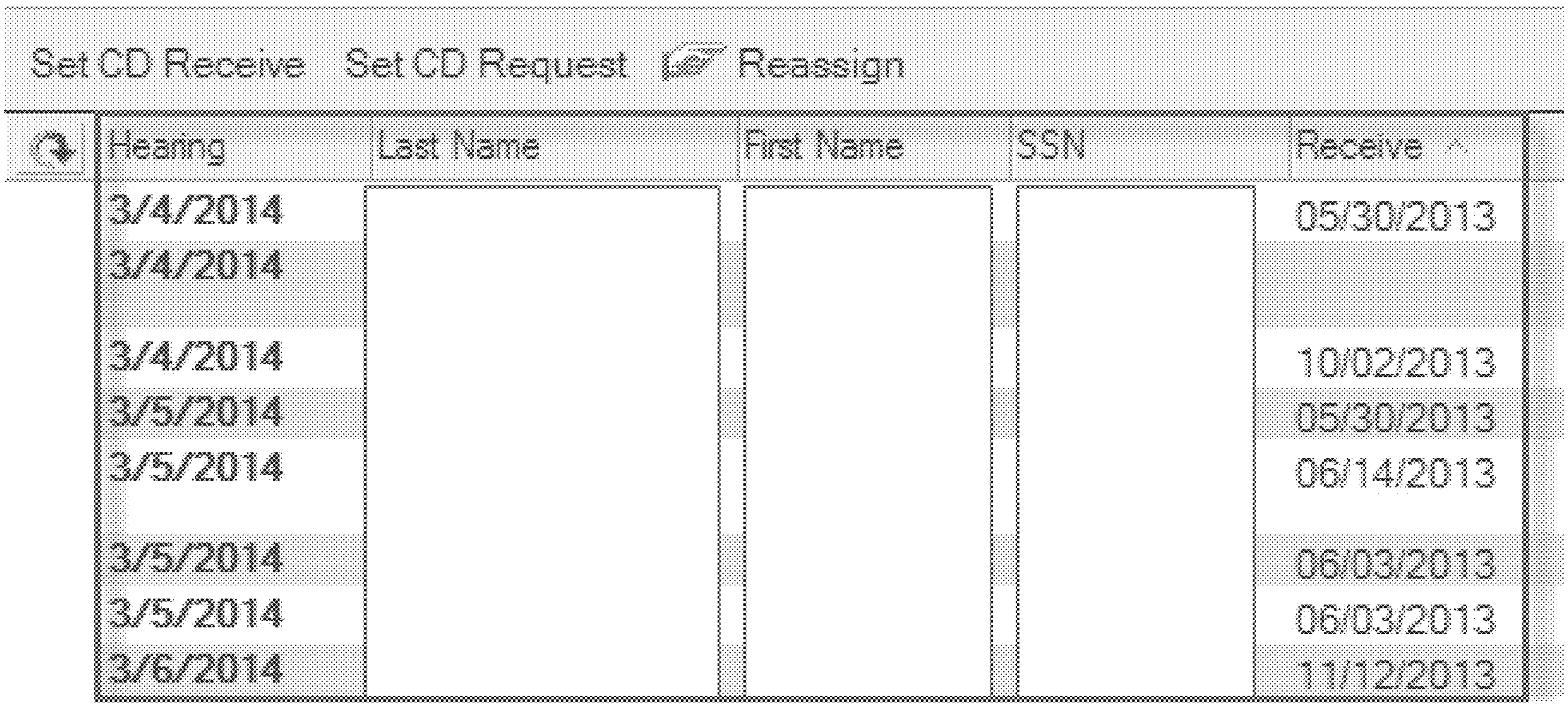


Fig. 259b

Receive ^	Request	Note	ODAR	Judge	LA
05/30/2013			Tampa	Slahta, Steven	6005-Pink
			Covington	Hart	6015-Blue
10/02/2013			Tampa	Slahta, Steven	6015-Blue
05/30/2013			Covington	Bedell, Laurie	6015-Blue
06/14/2013			Covington	Bedell, Laurie	6015-Blue
06/03/2013			Covington	Bedell, Laurie	6015-Blue
06/03/2013			Covington	Bedell, Laurie	6015-Blue
11/12/2013			Providence	Bower	6005-Pink
11/12/2013			Providence	Bower	6005-Pink
06/24/2013			Covington	Bedell, Laurie	6015-Blue

Fig. 260

The following print screens show where each column gets its information.

Hearing:

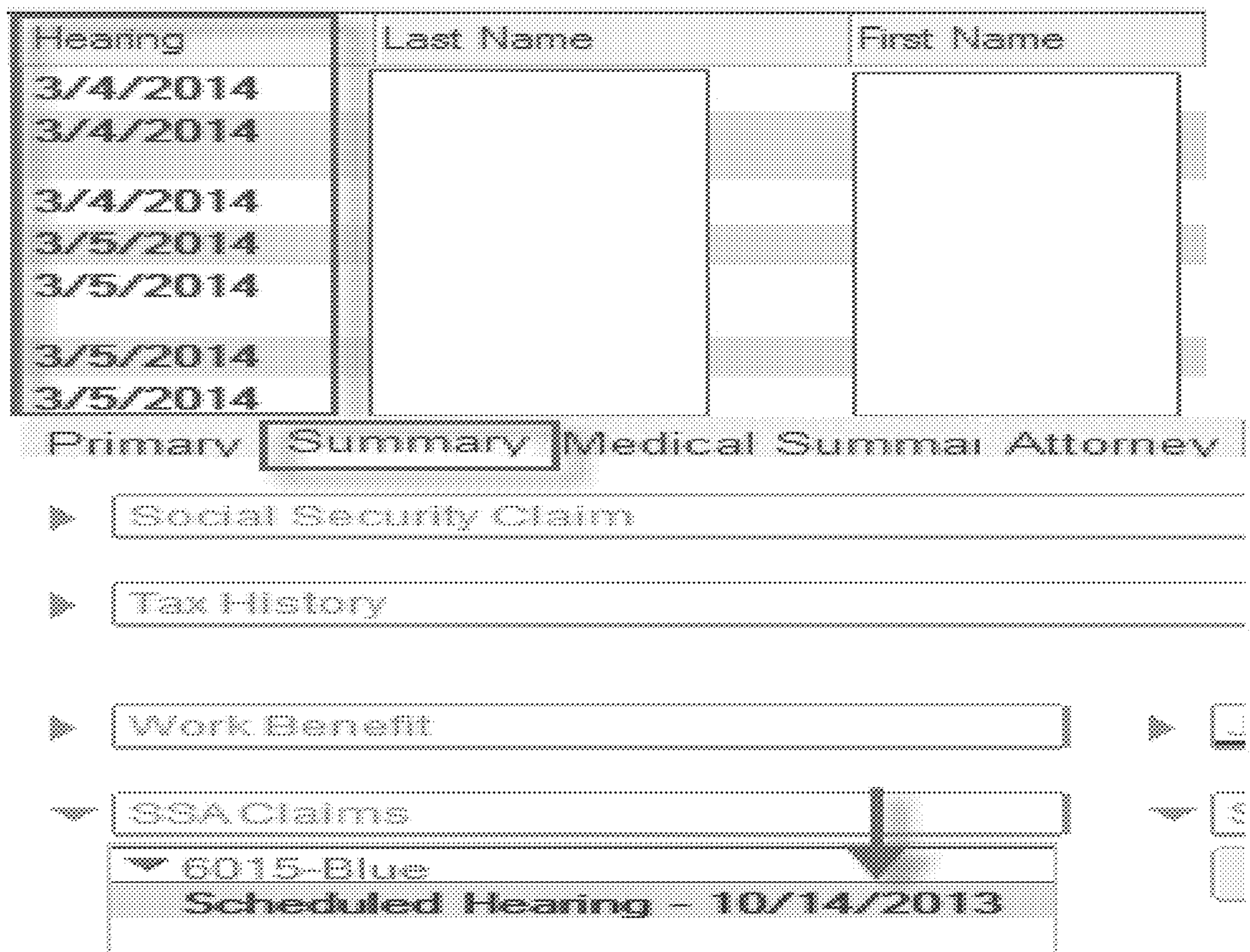


Fig. 261a

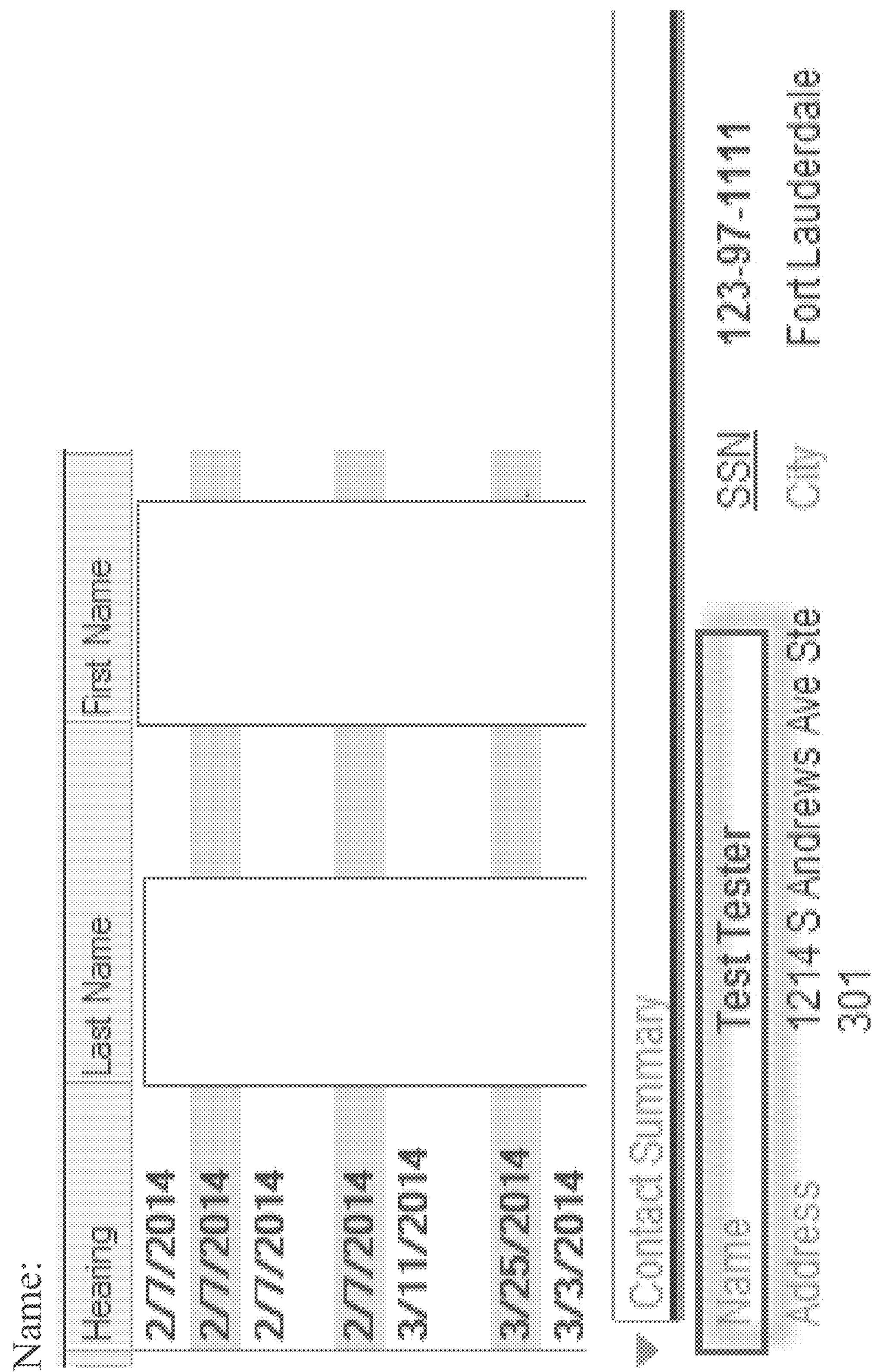
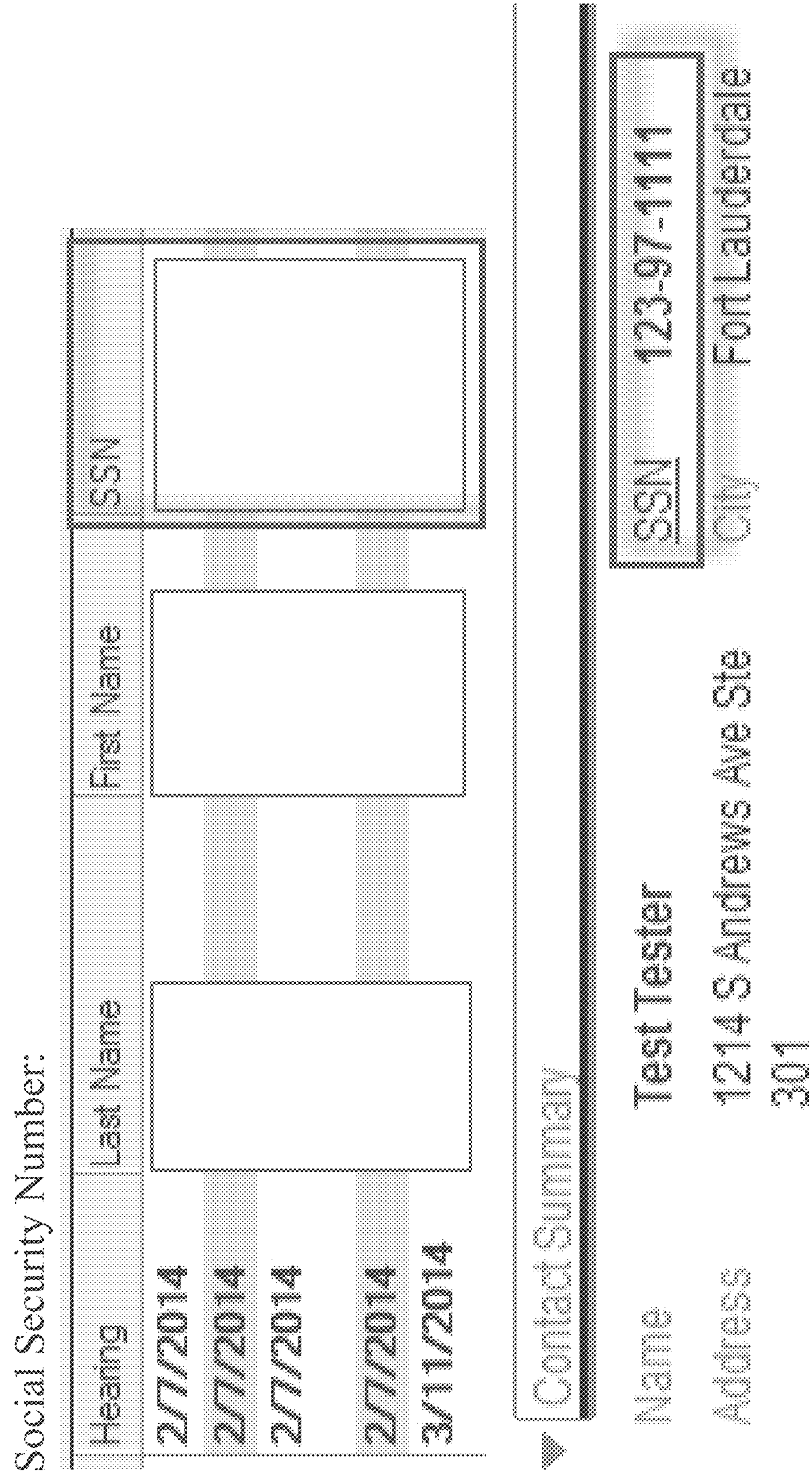

Name:
Hearing
Last Name
First Name
2/7/2014
2/7/2014
2/7/2014
2/7/2014
3/11/2014
3/25/2014
3/3/2014
Contact Summary
Name
Test Tester
SSN
123-97-1111
Address
1214 S Andrews Ave Ste 301
City
Fort Lauderdale

Fig. 261b



Social Security Number:
Hearing
Last Name
First Name
SSN
2/7/2014
2/7/2014
2/7/2014
2/7/2014
3/11/2014
Contact Summary
Name
Test Tester
Address
1214 S Andrews Ave Ste 301
SSN
123-97-1111
City
Fort Lauderdale

Fig. 262a

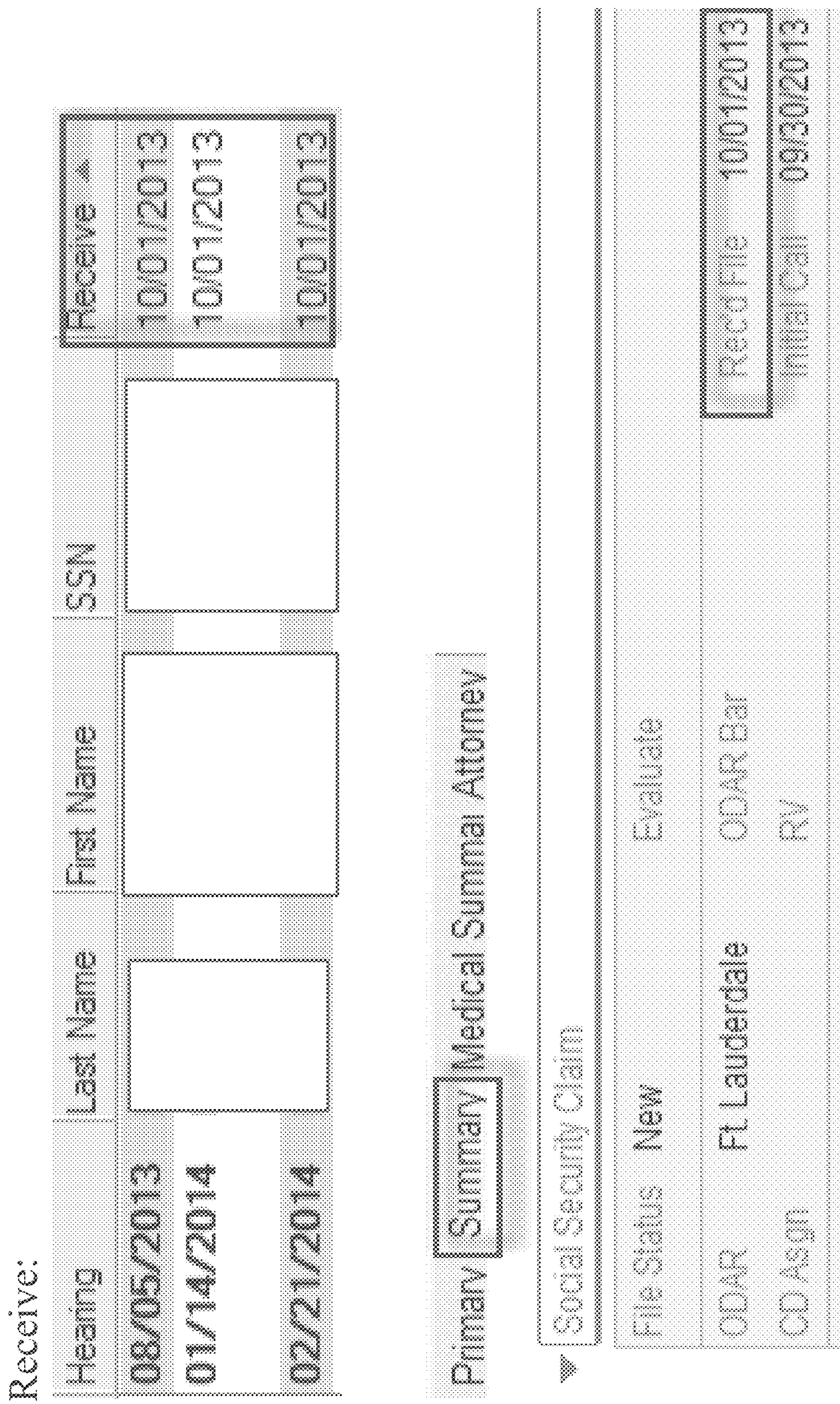

Receive:
Hearing
Last Name
First Name
SSN
Receive
08/05/2013
10/01/2013
01/14/2014
10/01/2013
02/21/2014
10/01/2013
Primary
Summary
Medical Summai
Attorney
Social Security Claim
File Status
New
Evaluate
ODAR
Ft Lauderdale
ODAR Bar
Rec'd File
10/01/2013
CD Asgn
RV
Initial Call
09/30/2013

Fig. 262b

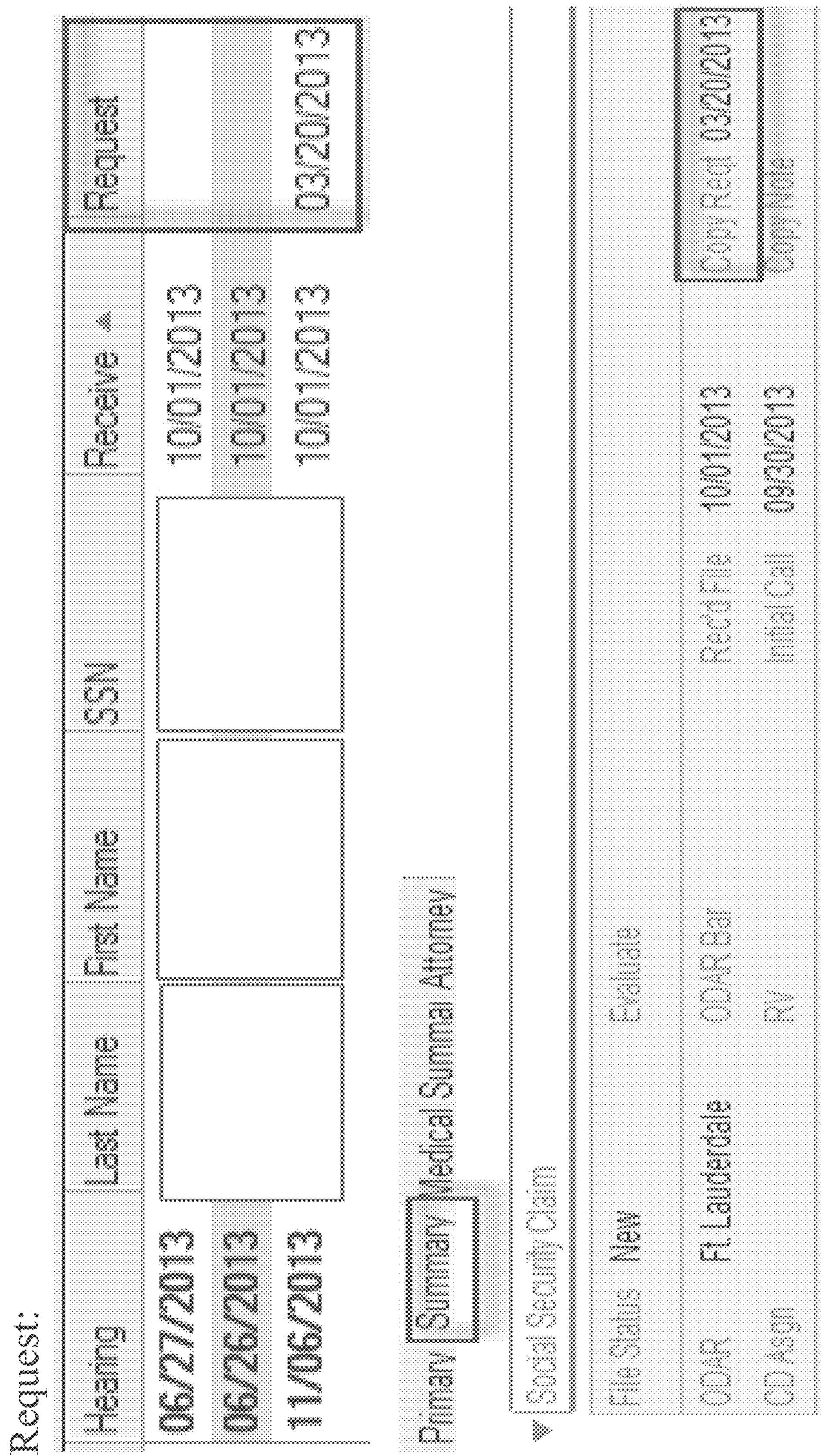

Request:
Hearing
Last Name
First Name
SSN
Receive
Request
06/27/2013
10/01/2013
06/26/2013
10/01/2013
11/06/2013
10/01/2013
03/20/2013
Primary
Summary
Medical Summar
Attorney
Social Security Claim
File Status
New
Evaluate
ODAR
Ft Lauderdale
ODAR Bar
Rec'd File
10/01/2013
Copy Req
03/20/2013
CD Asgn
RV
Initial Call
09/30/2013
Copy Note

Fig. 263a

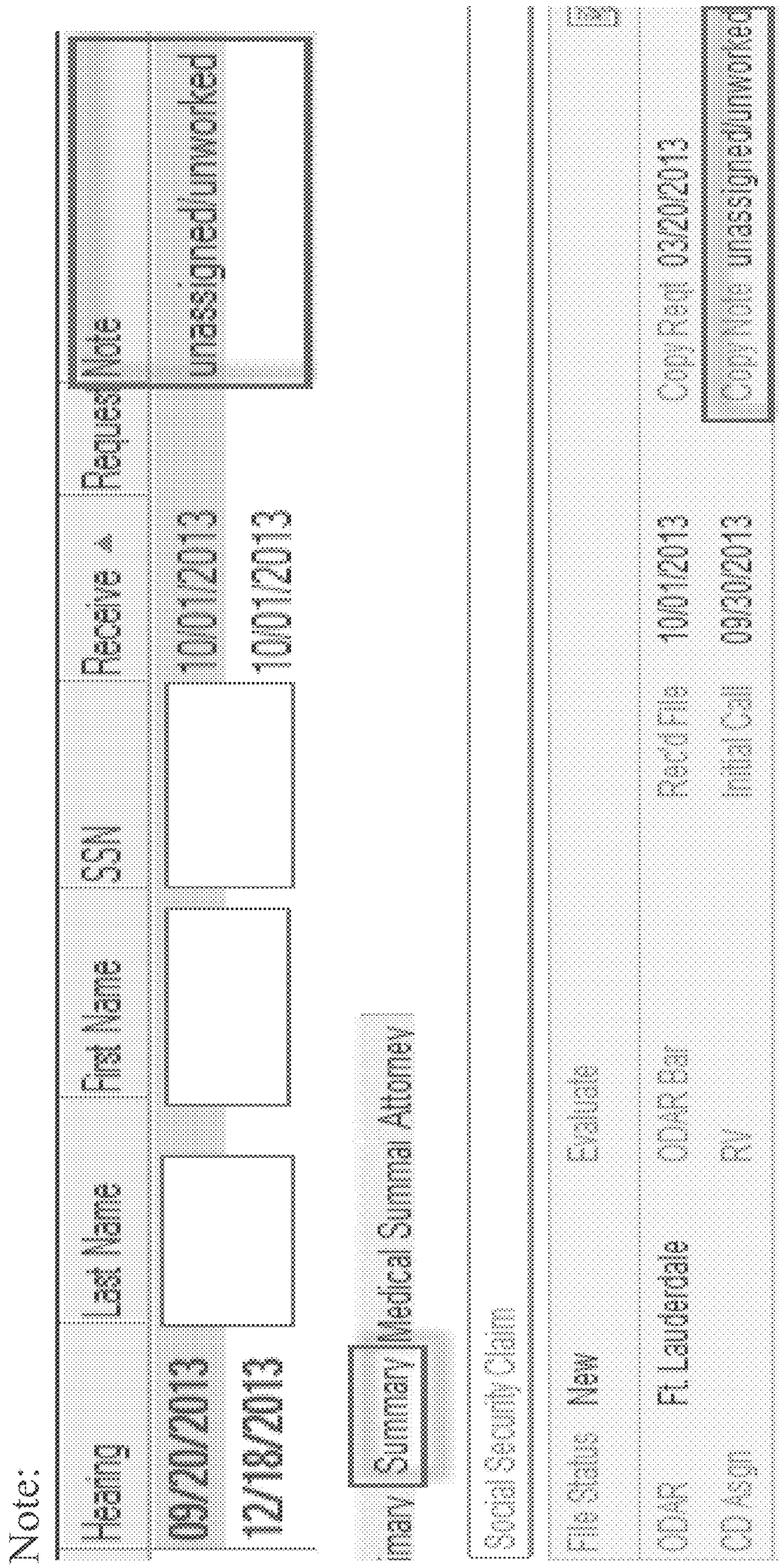

Note:
Hearing
Last Name
First Name
SSN
Receive
Request
Note
09/20/2013
10/01/2013
unassigned/unworked
12/18/2013
10/01/2013
Summary
Medical Summa
Attorney
Social Security Claim
File Status
New
Evaluate
ODAR
Ft. Lauderdale
ODAR Bar
Rec'd File
10/01/2013
Copy Req
03/20/2013
CD Asgn
RV
Initial Call
09/30/2013
Copy Note
unassigned/unworked

Fig. 263b

ODAR:

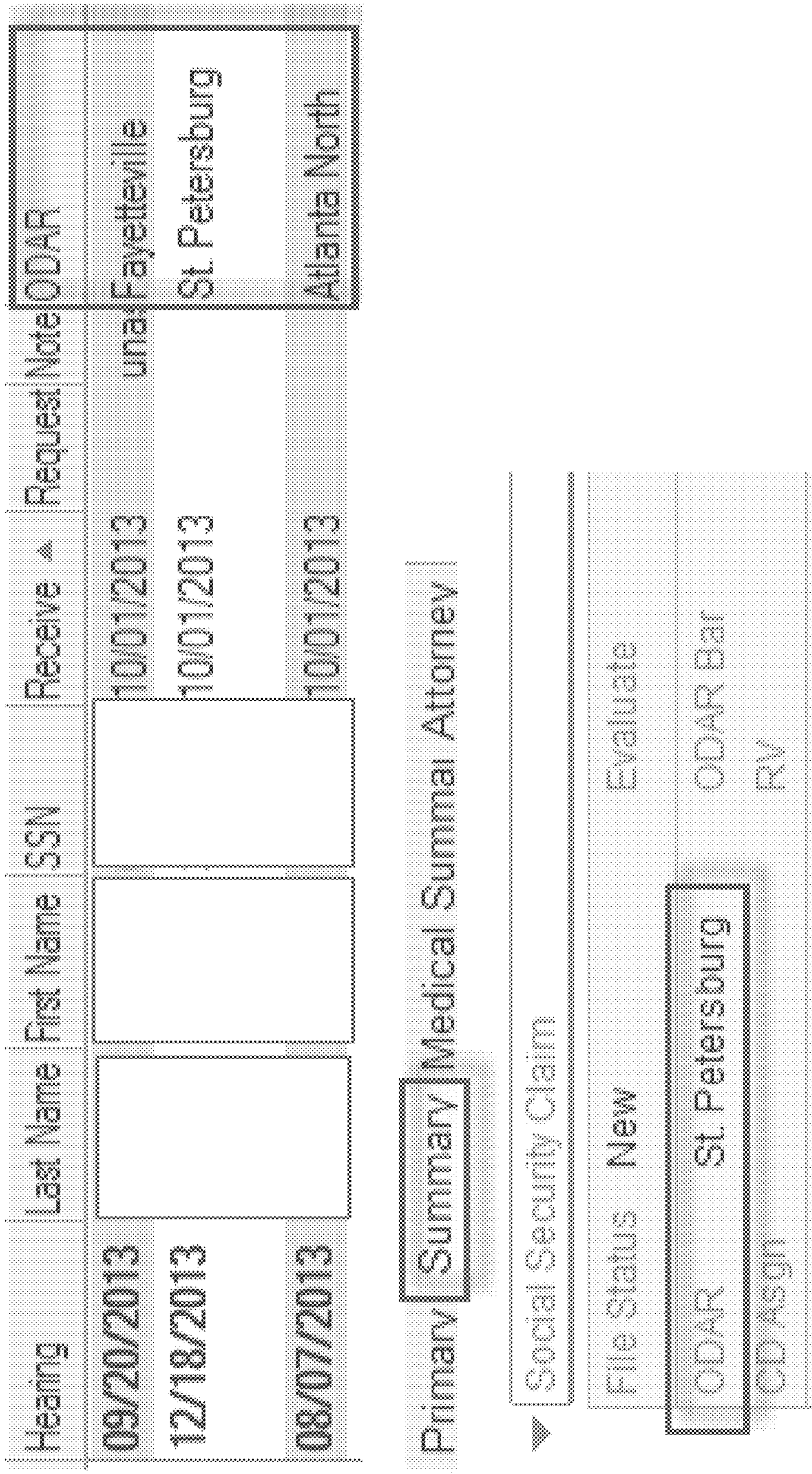


Fig. 264

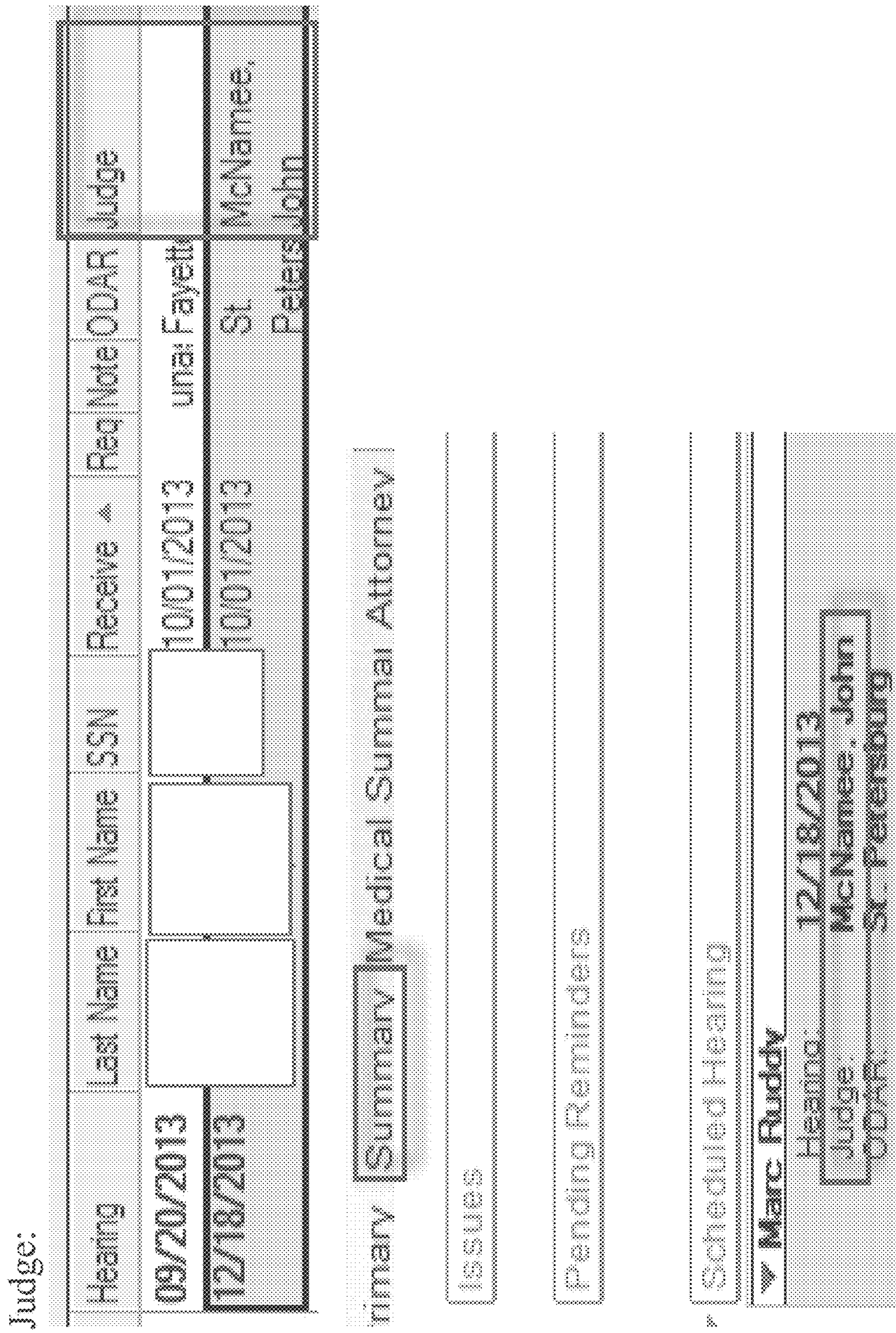

Judge:
Hearing
Last Name
First Name
SSN
Receive
Req
Note
ODAR
Judge
09/20/2013
10/01/2013
una
Fayett
12/18/2013
10/01/2013
St. Peters
McNamee, John
rimary
Summary
Medical Summa
Attorney
Issues
Pending Reminders
Scheduled Hearing
Marc Ruddy
Hearing:
12/18/2013
Judge:
McNamee, John
ODAR:
St. Petersburg

Fig. 265

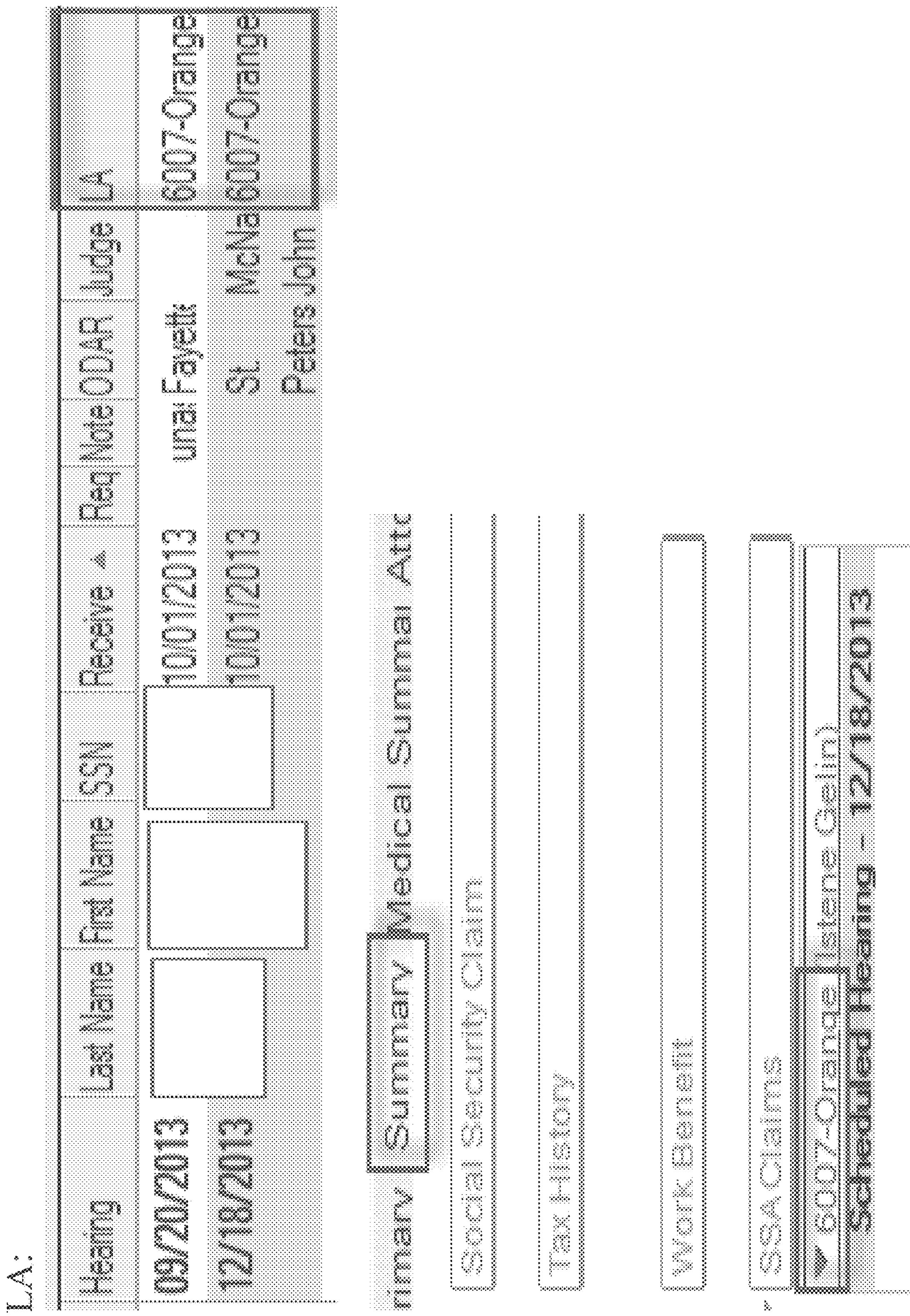

LA:
Hearing
Last Name
First Name
SSN
Receive
Req
Note
ODAR
Judge
LA
09/20/2013
10/01/2013
una: Fayett:
6007-Orange
12/18/2013
10/01/2013
St.
McNa
6007-Orange
Peters John
nmary
Summary
Medical Summa
Attc
Social Security Claim
Tax History
Work Benefit
SSA Claims
6007-Orange
stene Gelin)
Scheduled Hearing - 12/18/2013

Fig. 266

The arrow that is outlined in the red box indicates that the File Request List may be sorted by that field; the list is sorted by the field with a filled in arrow. This is helpful when determining which files have been received. When the user sorts by the Receive field, the client's with a blank Receive field will group together. The Receive field is filled in by the user once the file is received.

Unsorted:

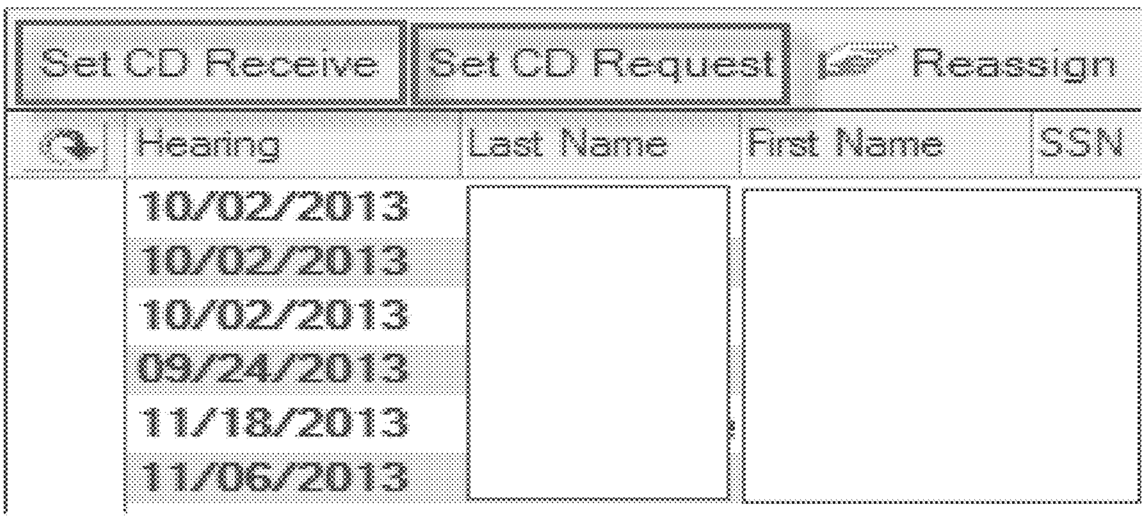
Hearing	Last Name	First Name	SSN	Receive ^
10/28/2013				
10/28/2013				
10/28/2013				
10/28/2013				
10/28/2013				
10/28/2013				

Sorted:

Hearing	Last Name	First Name	SSN	Receive ▲
10/02/2013				
10/02/2013				
10/02/2013				
09/24/2013				
11/18/2013				

Fig. 267

The File Request List has two buttons (Set CD Receive and Set CD Request) that allow the user to quickly fill in the Receive and Request dates. The user may fill in multiple clients' date simultaneously to save time. The user will click to the left of the Hearing column in the row they wish to fill and press the corresponding button.



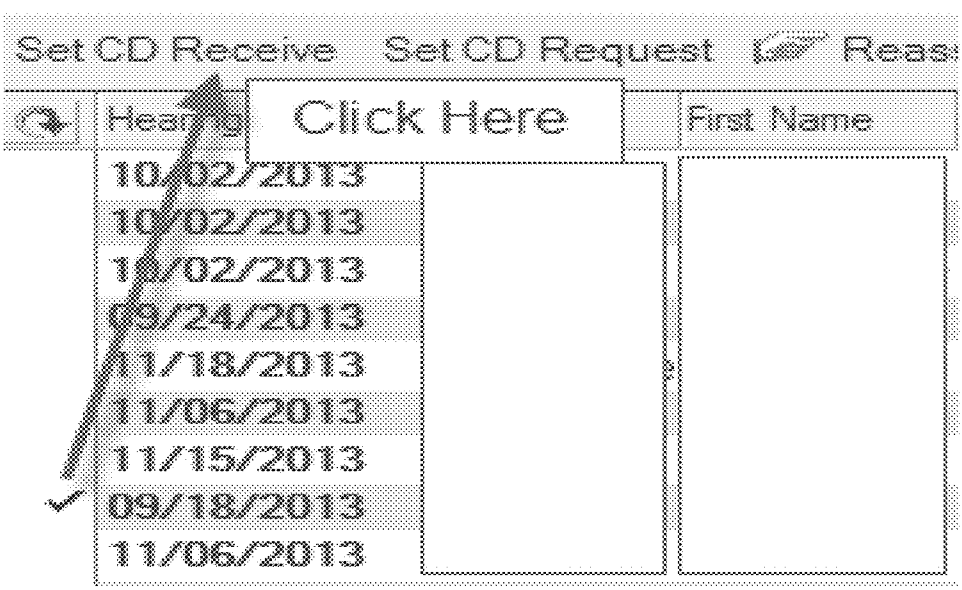


Fig. 268

Special

The Special view is used by the Special Case Developer team to keep track of the clients that have "Special" cases - generally referring to time sensitivity. The Special view organizes and tracks the clients' cases as well as provides a quick view of what tasks are pending.

The Special view is accessed by clicking on SSA: Hearing > "Special"

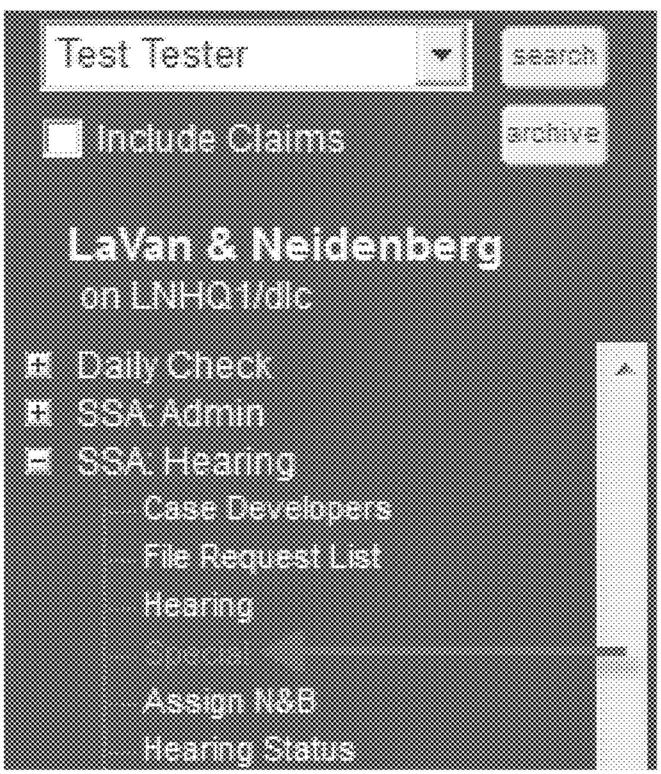


Fig. 269

The system places all of the contacts with POST (MR), POST (CE), VSU / IFR, and ODAR in their Special field on the list.

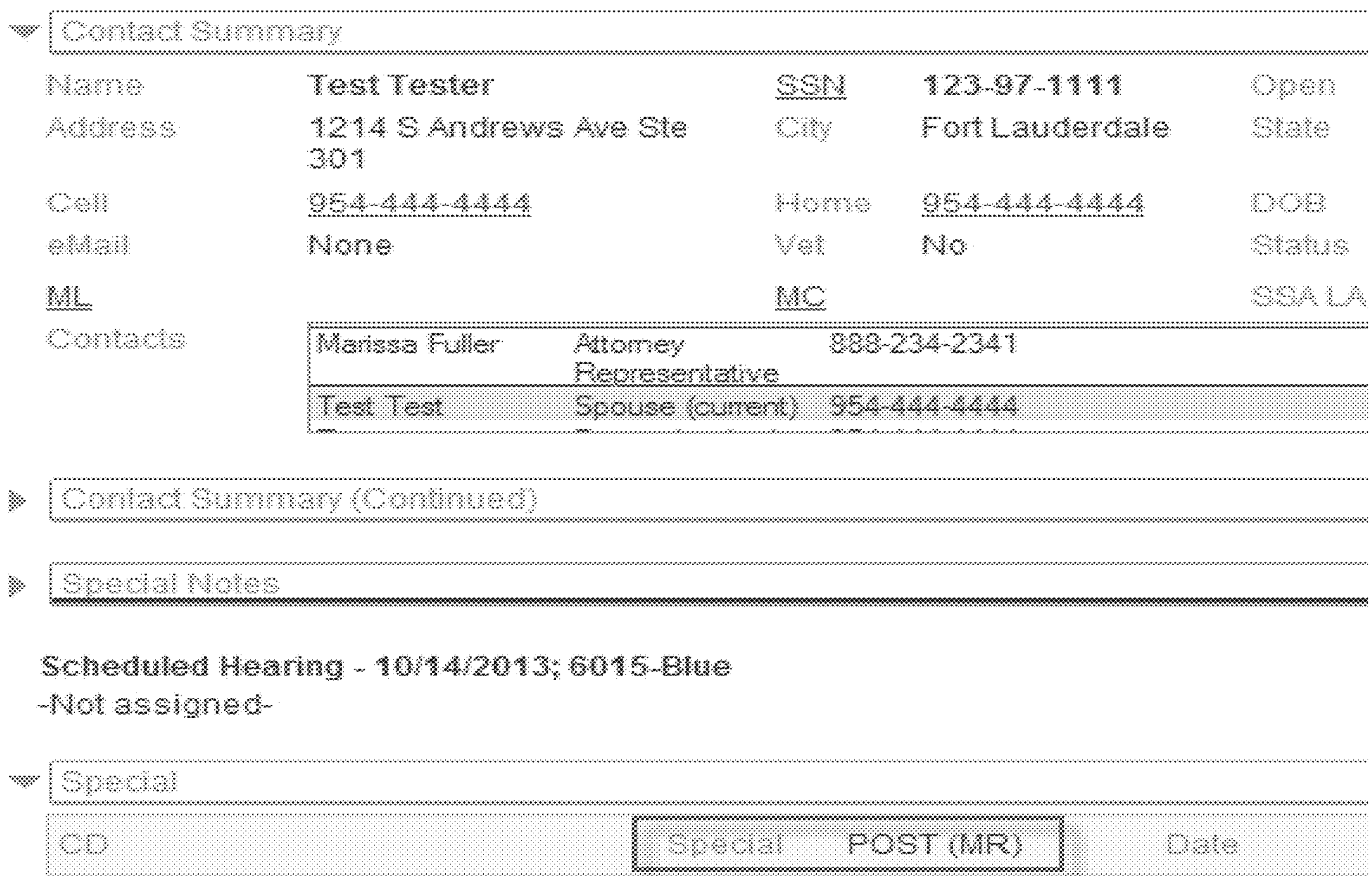


Fig. 270a

The Special field is edited by clicking on the pencil/paper icon and using the dropdown. The user must edit this field in order to add or remove the contact to/from the Special list.

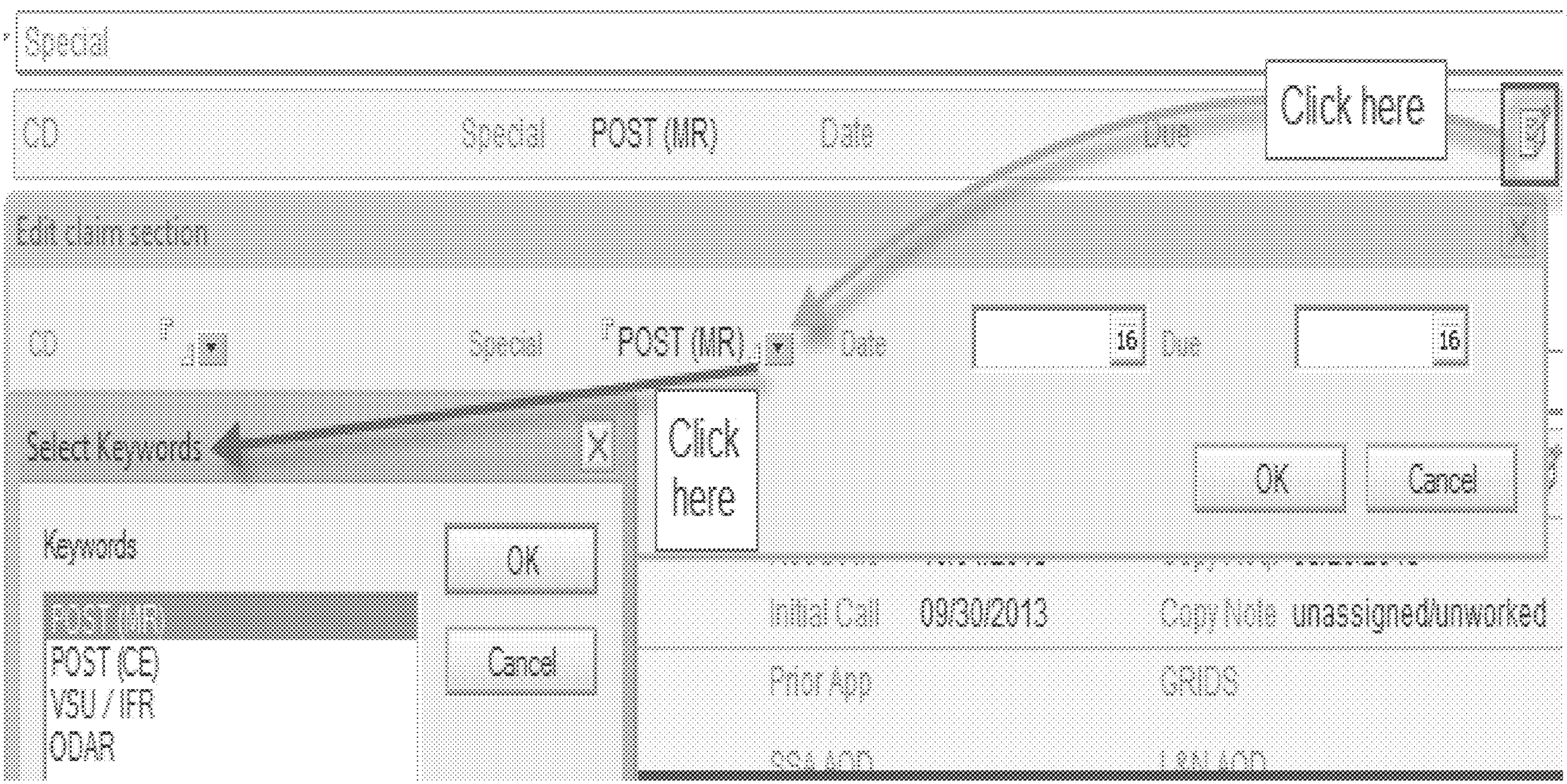


Fig. 270b

The Special view has subcategories that divide the list by the Special field.

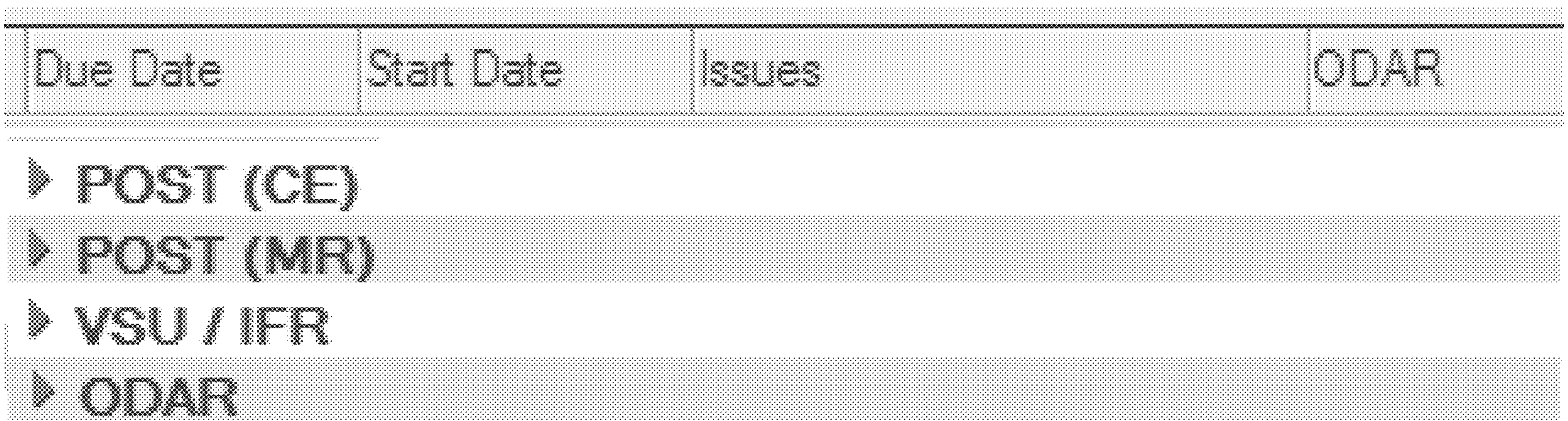


Fig. 271a

The following print screen shows the Special view. The columns display critical information from the client's Contact page so the user can quickly assess and work on the client's case.

	Due Date	Start Date	Issues	ODAR	Client
	11/15/2013	08/20/0213			CM
	12/16/2013	11/06/2012			MF (cl)
POST (MR)					
	07/13/2013	10/30/2012			MF (dr or cl)
POST (CE)					
	11/27/2013	10/27/2013	CE exam 11/26		CM,MF (dr or cl)
	12/14/2013	12/14/2013	CE exam 12/14		MF (dr or cl)
POST (MR)					
	08/09/2013	07/26/2013			MF (dr or cl),CM
	08/16/2013	07/26/2013			

Fig. 271b

File	Claim Status	Last	First	SSN
1MR	Post Hearing			
1MR	Post Hearing			
done	Unfavorable Hearing (Pending Paperwork)			
done	Post Hearing			
SUBMIT,Tab	Post Hearing			
done	Unfavorable Hearing (New App)			
1MR	Unfavorable Hearing (Assess)			

Fig. 272a

The following print screens will show where each column gets its information.

The Due Date column is mainly used for the Post (MR) and Post (CE) cases. This lets the Case Developer know when all items are due to the judge on that case.

Due Date	Start Date	Issues
POST (CE)		
11/10/2013	10/10/2013	PHYSICAL CE
11/26/2013	10/15/2013	PHYSICAL CE
12/17/2013	10/25/2013	PHYSICAL CE
12/20/2013	11/20/2013	PSYCH CE
POST (MR)		
10/11/2013	09/23/2013	
10/16/2013	09/16/2013	SUBPOENA MRs
11/01/2013	10/01/2013	

Fig. 272b

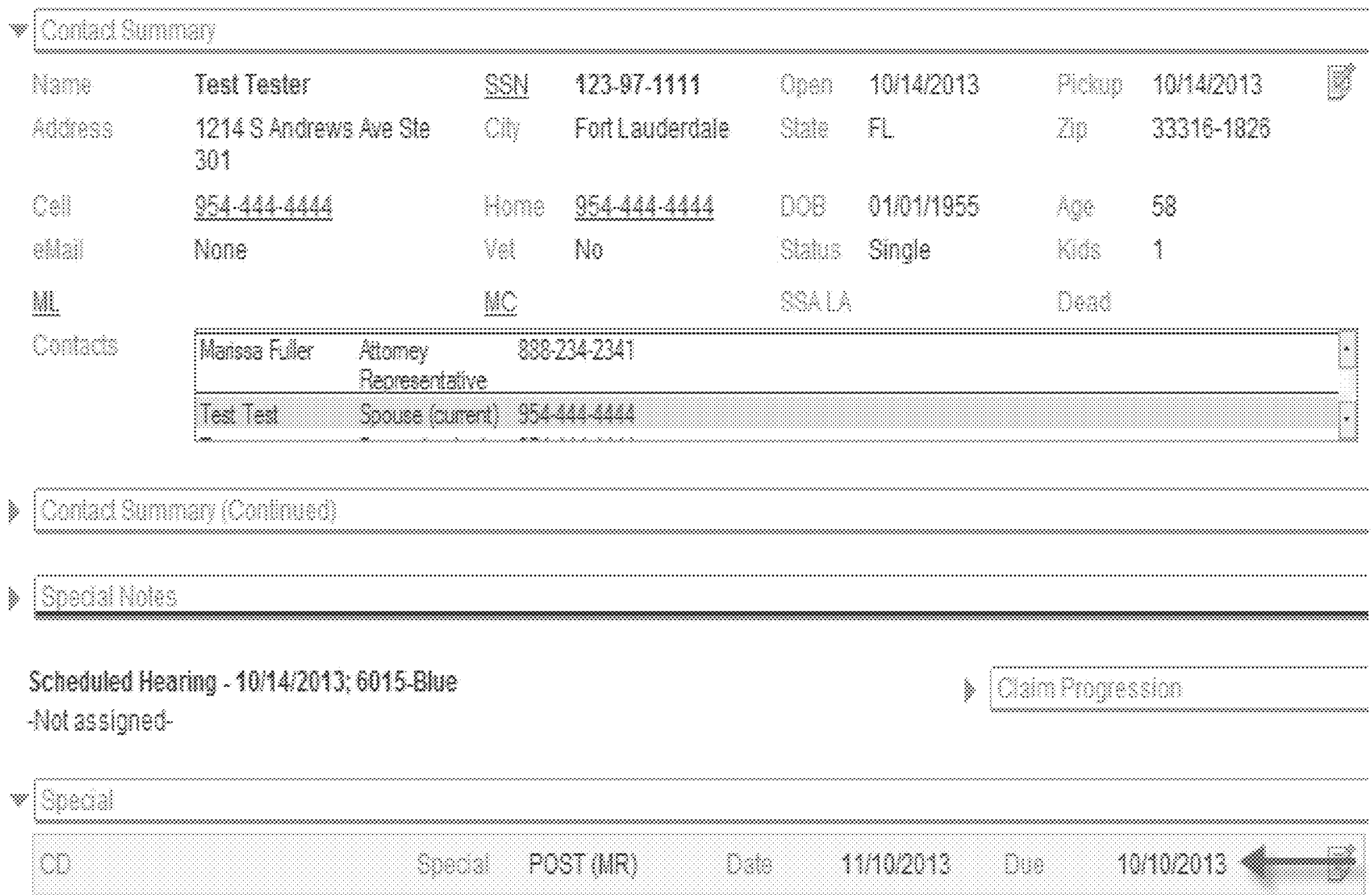

Contact Summary
Name
Test Tester
SSN
123-97-1111
Open
10/14/2013
Pickup
10/14/2013
Address
1214 S Andrews Ave Ste 301
City
Fort Lauderdale
State
FL
Zip
33316-1826
Cell
954-444-4444
Home
954-444-4444
DOB
01/01/1955
Age
58
eMail
None
Vet
No
Status
Single
Kids
1
ML
MC
SSA LA
Dead
Contacts
Marissa Fuller
Attorney Representative
888-234-2341
Test Test
Spouse (current)
954-444-4444
Contact Summary (Continued)
Special Notes
Scheduled Hearing - 10/14/2013; 6015-Blue
-Not assigned-
Claim Progression
Special
CD
Special
POST (MR)
Date
11/10/2013
Due
10/10/2013

Fig. 272c

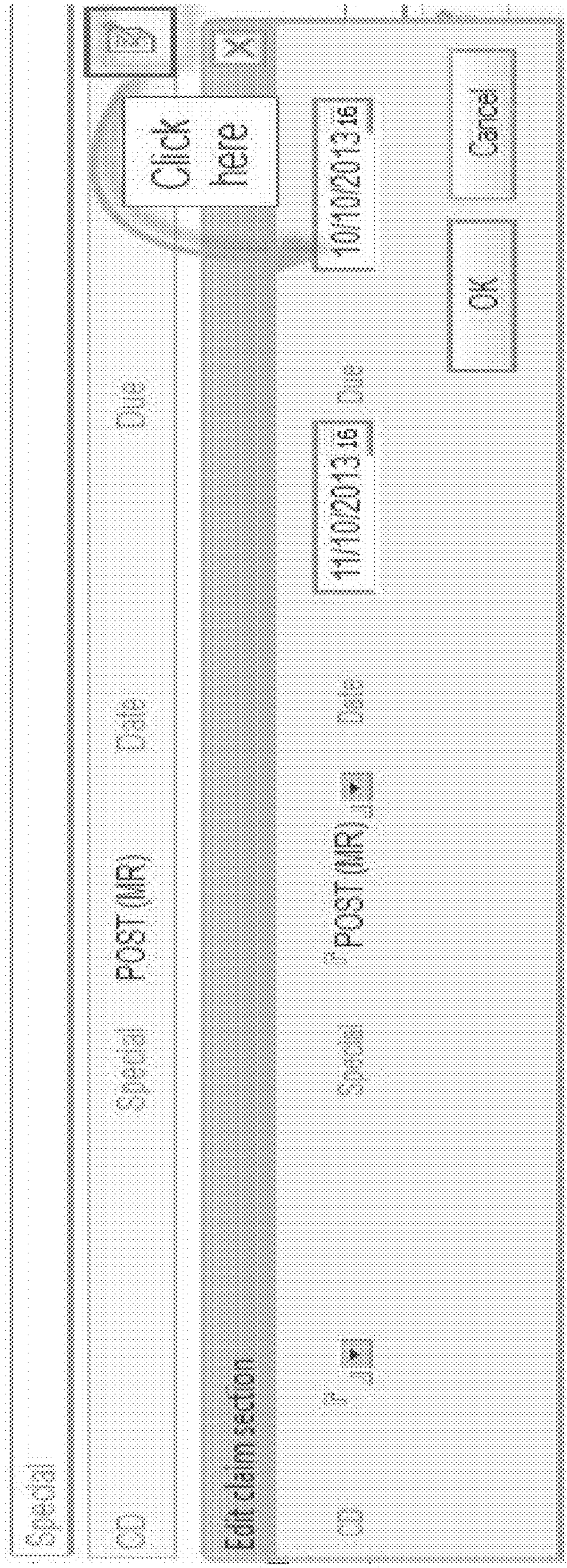
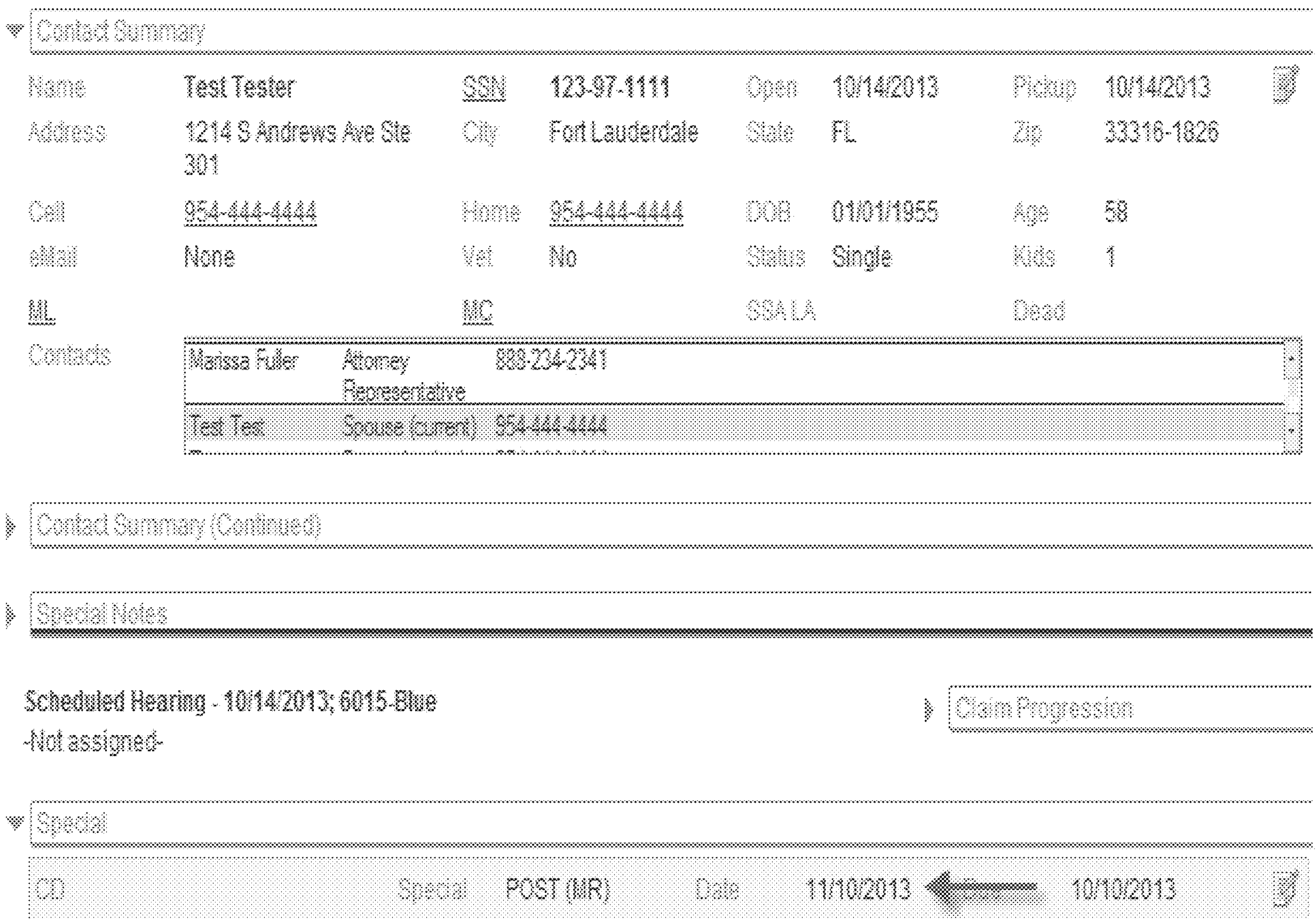

Special
CD
Special
POST (MR)
Date
Due
Click here
Edit claim section
CD
Special
POST (MR)
Date
11/10/2013 16
Due
10/10/2013 16
OK
Cancel

Fig. 273a

The Start Date column indicates the date that the contact was added to the Special view.

Due Date	Start Date	Issues
▼ POST (CE)		
11/10/2013	10/10/2013	PHYSICAL CE
11/26/2013	10/15/2013	PHYSICAL CE
12/17/2013	10/25/2013	PHYSICAL CE
12/20/2013	11/20/2013	PSYCH CE
▼ POST (MR)		
10/11/2013	09/23/2013	
10/16/2013	09/16/2013	SUBPOENA MRs
11/01/2013	10/01/2013	

Fig. 273b


Contact Summary
Name Test Tester
SSN 123-97-1111
Open 10/14/2013
Pickup 10/14/2013
Address 1214 S Andrews Ave Ste 301
City Fort Lauderdale
State FL
Zip 33316-1826
Cell 954-444-4444
Home 954-444-4444
DOB 01/01/1955
Age 58
eMail None
Vet No
Status Single
Kids 1
ML
MC
SSA LA
Dead
Contacts
Marissa Fuller Attorney Representative 888-234-2341
Test Test Spouse (current) 954-444-4444
Contact Summary (Continued)
Special Notes
Scheduled Hearing - 10/14/2013; 6015-Blue
-Not assigned-
Claim Progression
Special
CD
Special POST (MR)
Date 11/10/2013
10/10/2013

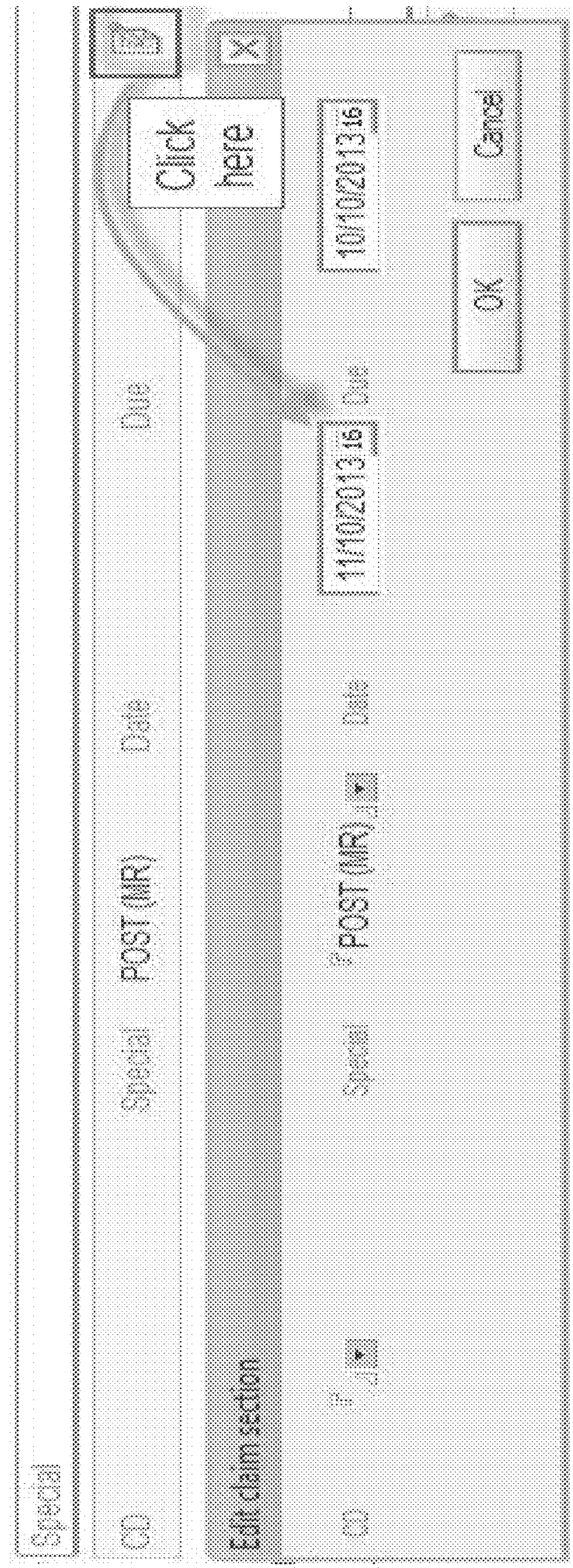

Special
CD
Special
POST (MR)
Date
Due
Click here
Edit claim section
CD
Special
POST (MR)
Date
11/10/2013
Due
10/10/2013
OK
Cancel

Fig. 273c

Fig. 274

The Issues column is used to keep any important notes in regards to the case. For Special cases, typically the location or contact for the Office of Disability Adjudication and Review (ODAR) is kept in this field.

Due Date	Start Date	Issues
POST (CE)		
10/08/2013	06/14/2013	
10/09/2013	11/09/2012	
11/07/2013	11/09/2012	Post Psych CE
	11/09/2012	
POST (MR)		
10/17/2013	07/29/2013	
11/26/2013	11/09/2012	

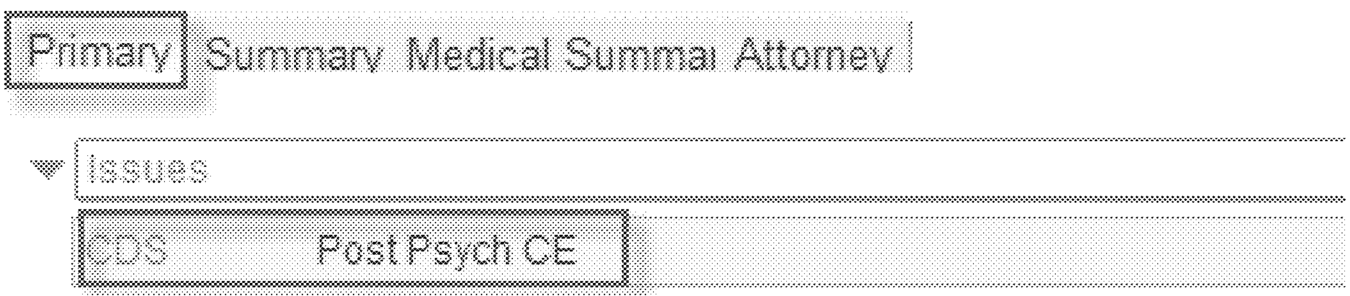
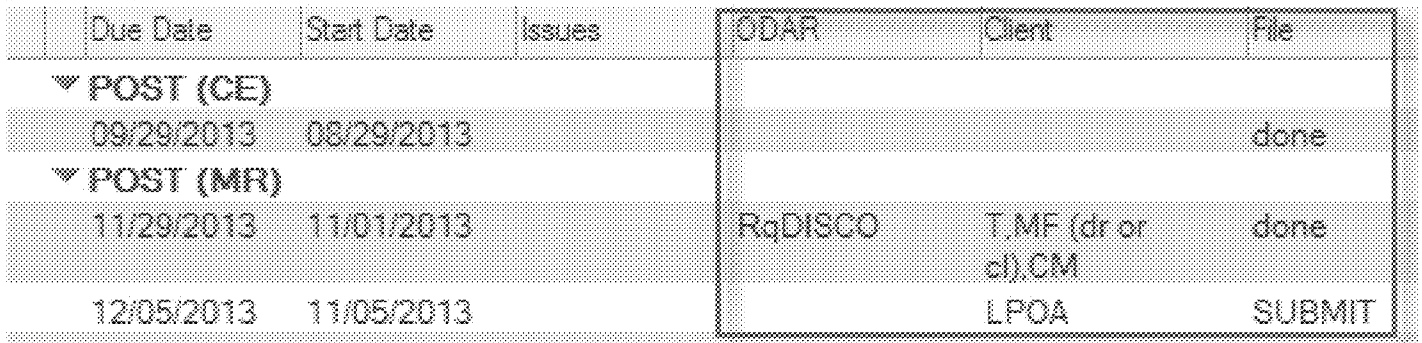


Fig. 275a

The ODAR, Client, and File columns connect to the Pending Reminders in the contact page. These columns help the case developer quickly see what items are currently pending for each case.



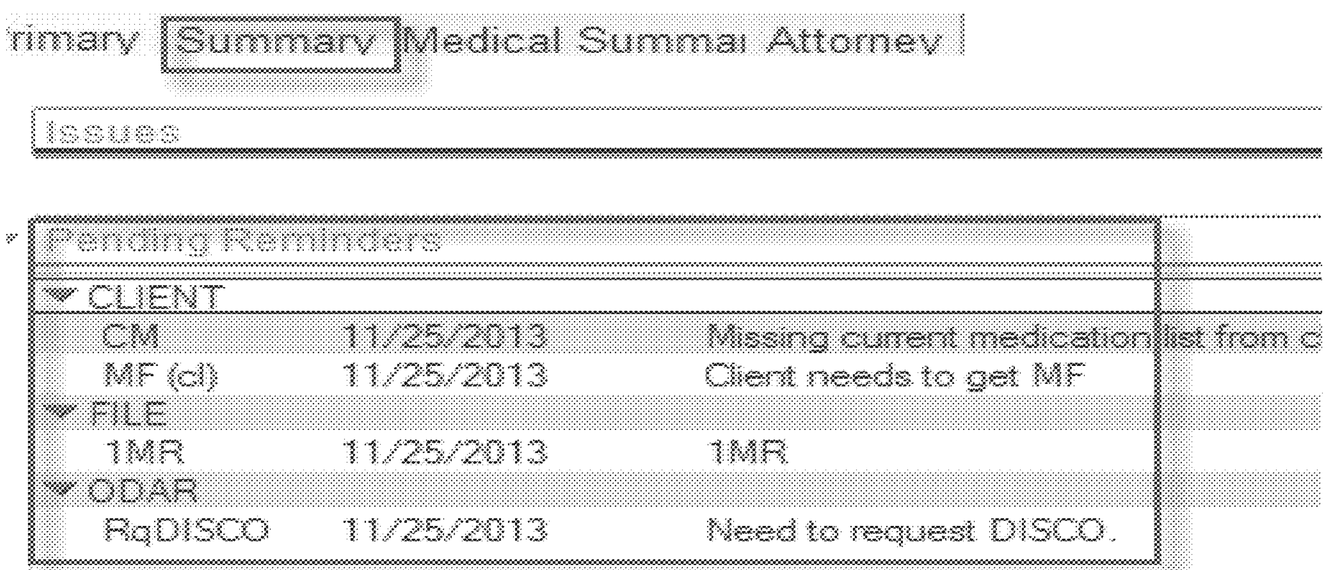


Fig. 275b

The Claim Status column shows the current status of the client's claim.

	Due Date	Start Date	Issues	ODAR	Client	File	Claim Status
▼ **POST (CE)**							
	09/29/2013	08/29/2013				done	Post Hearing
▼ **POST (MR)**							
	11/29/2013	11/01/2013		RqDISCO	T,MF (dr or cl),CM	done	Post Hearing
	12/05/2013	11/05/2013			LPOA	SUBMIT	Post Hearing

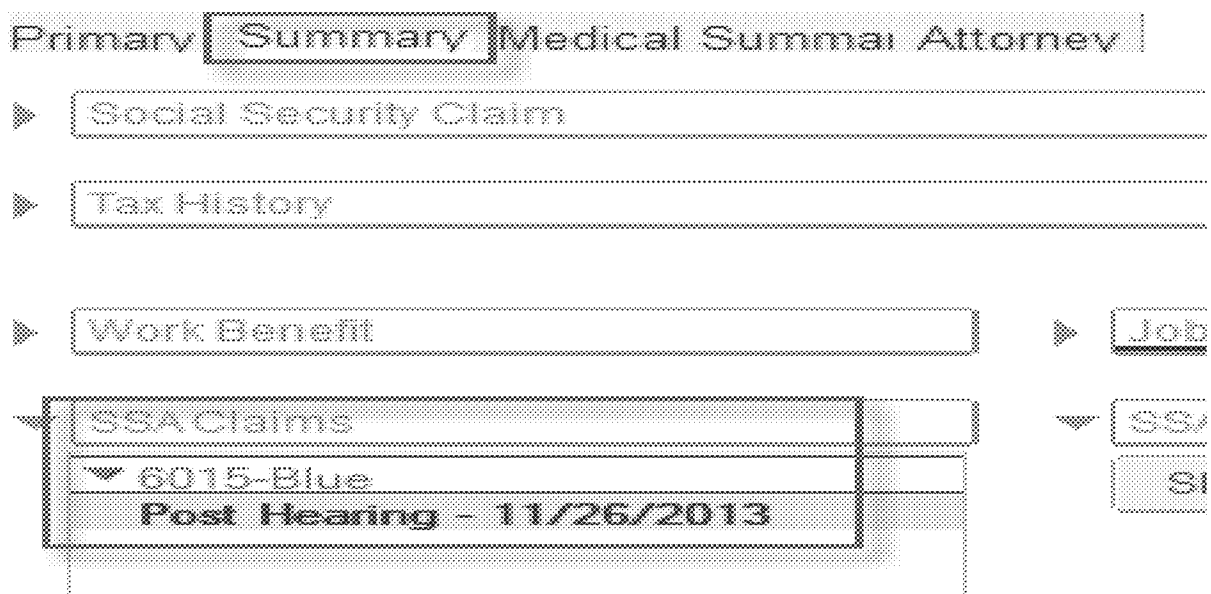


Fig. 276

The Last Name, First Name, and SSN are connected to the contact page.

Due Date	Start Date	Issues	ODAR	Client	File	Claim Status	Last	First	SSN
POST (CE)									
09/29/2013	08/29/2013				done	Post Hearing			
POST (MR)									
11/29/2013	11/01/2013		RqDISCO	T,MF (dr or cl),CM	done	Post Hearing			

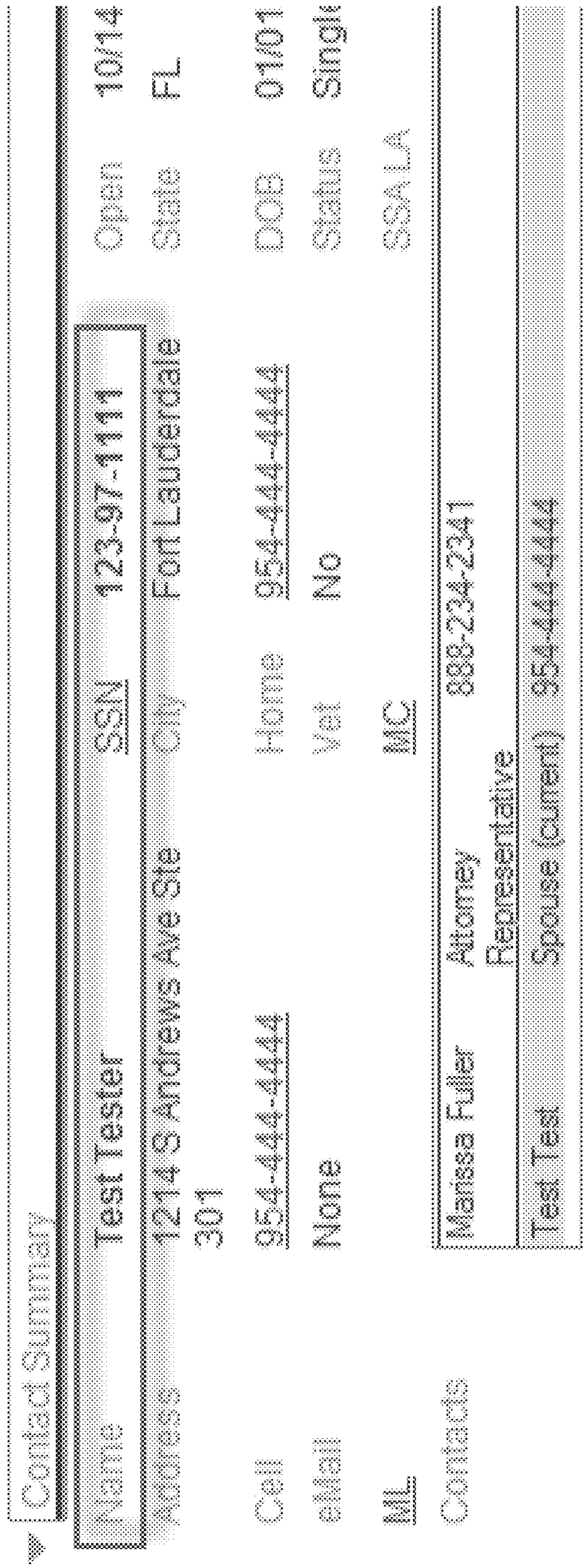

Contact Summary
Name
Test Tester
SSN
123-97-1111
Open
10/14
Address
1214 S Andrews Ave Ste 301
City
Fort Lauderdale
State
FL
Cell
954-444-4444
Home
954-444-4444
DOB
01/01
eMail
None
Vet
No
Status
Singl
ML
MC
SSA LA
Contacts
Marissa Fuller
Attorney Representative
888-234-2341
Test Test
Spouse (current)
954-444-4444

Fig. 277

Fig. 278a

Invoice Tracking

Throughout any given week the firm receives hundreds of invoices for medical records and therefore tracking the status of the invoices is critical. There are two invoice views: 1. To Pay; or 2. Paid

Fig. 278b

Section 1: the "To Pay" view once selected will open as shown below.

Pay Invoices | Cancel Invoices | Copy Check Name | Copy Check Amount | Copy Check Address

Type	Received	Invoice #	Invoice Amo	First Name	Last Name	Claim Status	Status Date	SSN	Facility/Doctor
▼ Approved									
▼ Check									
Pre-Bill	11/26/2013		$27.22			post hearing	11/06/2013		Children's Medic
Pre-Bill	11/25/2013	11222013	$31.50			scheduled hearing	01/07/2014		Consult Care In
Pre-Bill	11/25/2013	2670-1	$10.00			scheduled hearing	02/07/2014		Solace Behavio Center)
Pre-Bill	11/25/2013		$12.00			scheduled hearing	12/03/2013		South County M

Fig. 279a

The "To Pay" has categories to organize the flow of invoices. By expanding the category the user can view the invoices.

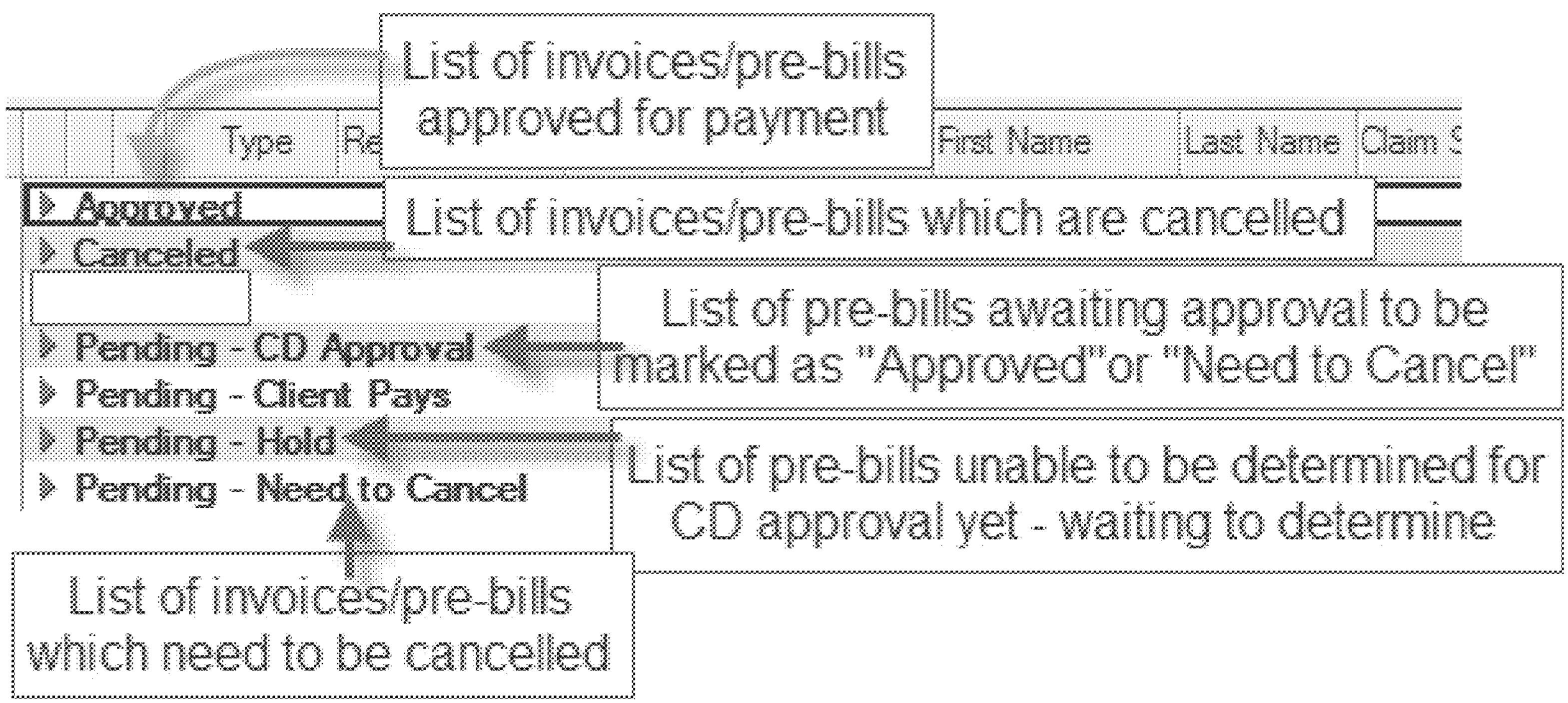
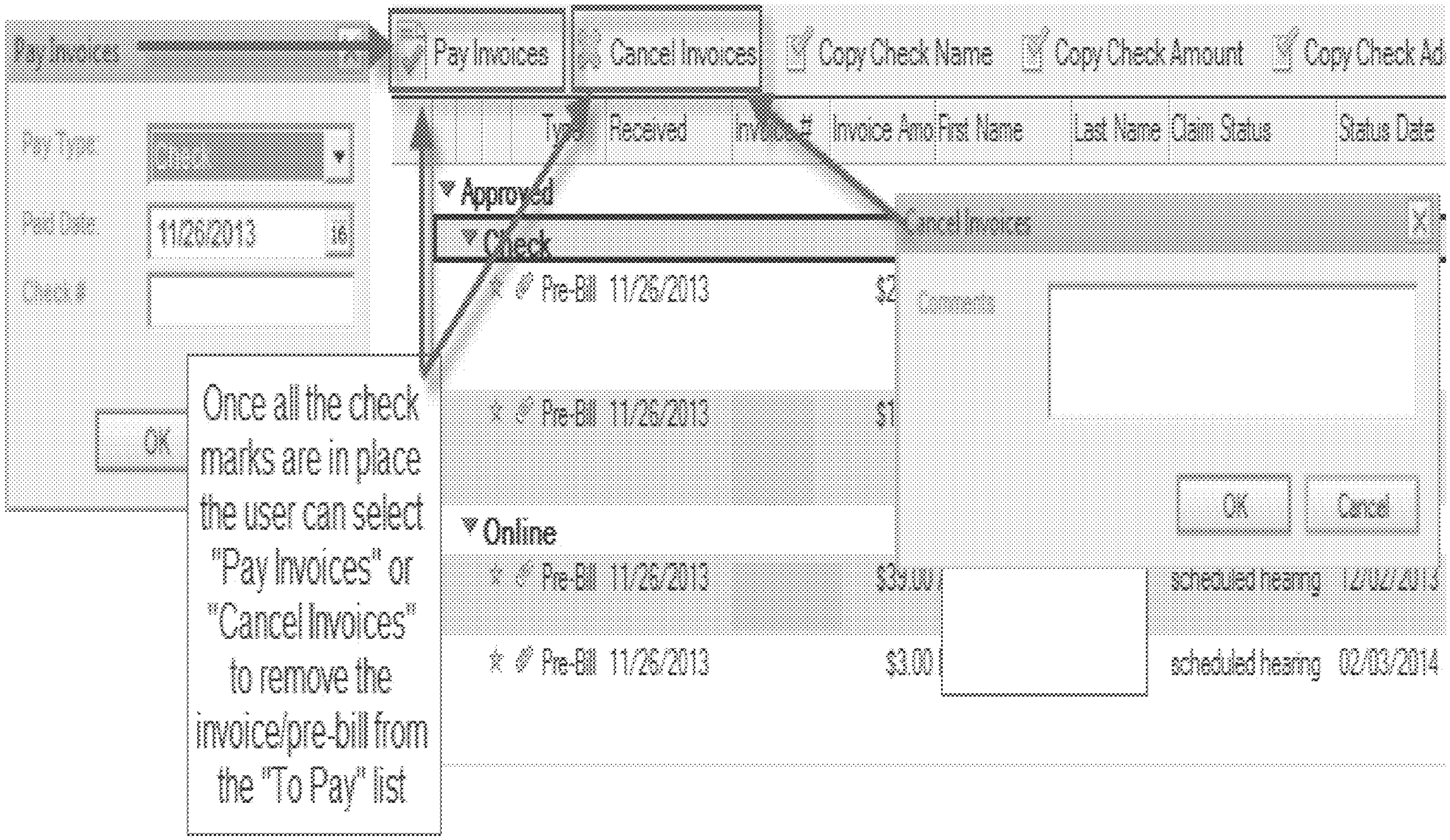


Fig. 279b

Expand a category by clicking on the category header.



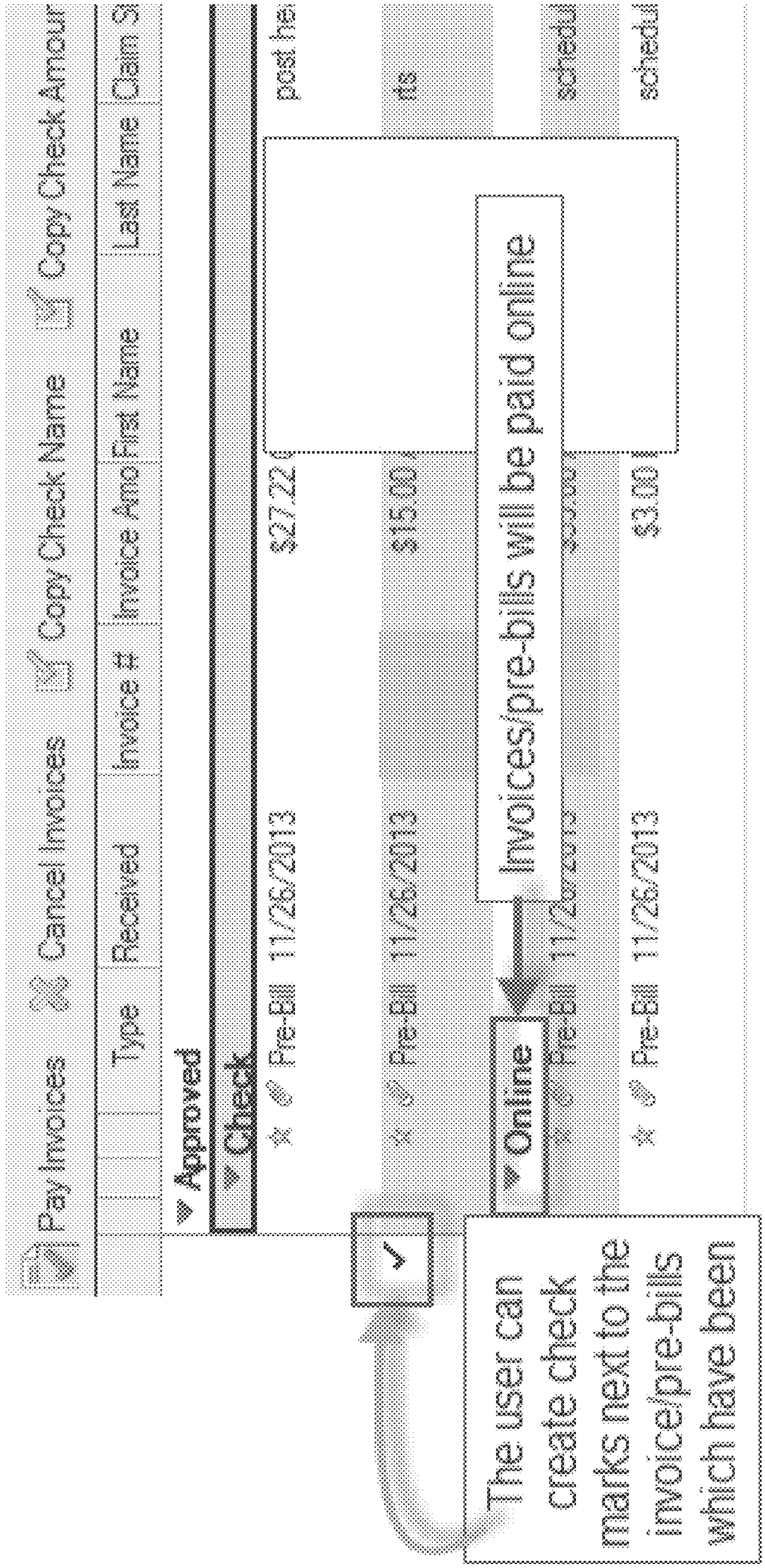
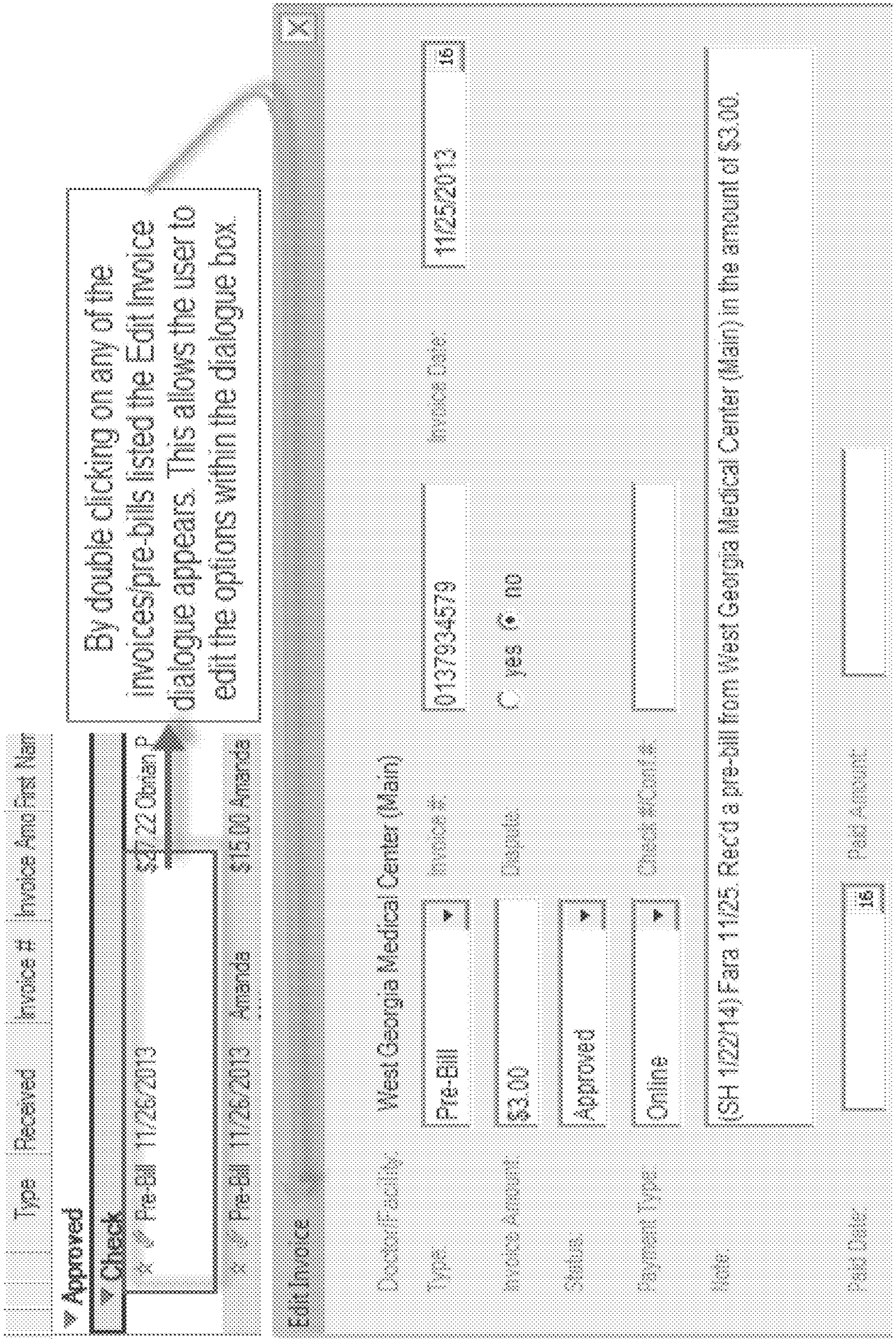

Pay Invoices
Cancel Invoices
Copy Check Name
Copy Check Amour
Type
Received
Invoice #
Invoice Amo
First Name
Last Name
Claim St
Approved
Check
Pre-Bill 11/26/2013 $27.22
post he
Pre-Bill 11/26/2013 $15.00
Online
Pre-Bill
Pre-Bill 11/26/2013 $3.00
Invoices/pre-bills will be paid online
The user can create check marks next to the invoice/pre-bills which have been

Fig. 279c

Fig. 279d



Type
Received
Invoice #
Invoice Amo
First Nam
Approved
Check
Pre-Bill 11/26/2013
$2.22 Obrian P
Pre-Bill 11/26/2013 Amanda
$15.00 Amanda
By double clicking on any of the invoices/pre-bills listed the Edit Invoice dialogue appears. This allows the user to edit the options within the dialogue box.
Edit Invoice
Doctor/Facility:
West Georgia Medical Center (Main)
Type:
Pre-Bill
Invoice #:
0137934579
Invoice Date:
11/25/2013
Invoice Amount:
$3.00
Dispute:
yes
no
Status:
Approved
Payment Type:
Online
Check #/Conf #:
Note:
(SH 1/22/14) Fara 11/25. Rec'd a pre-bill from West Georgia Medical Center (Main) in the amount of $3.00.
Paid Date:
Paid Amount:

Fig. 279e

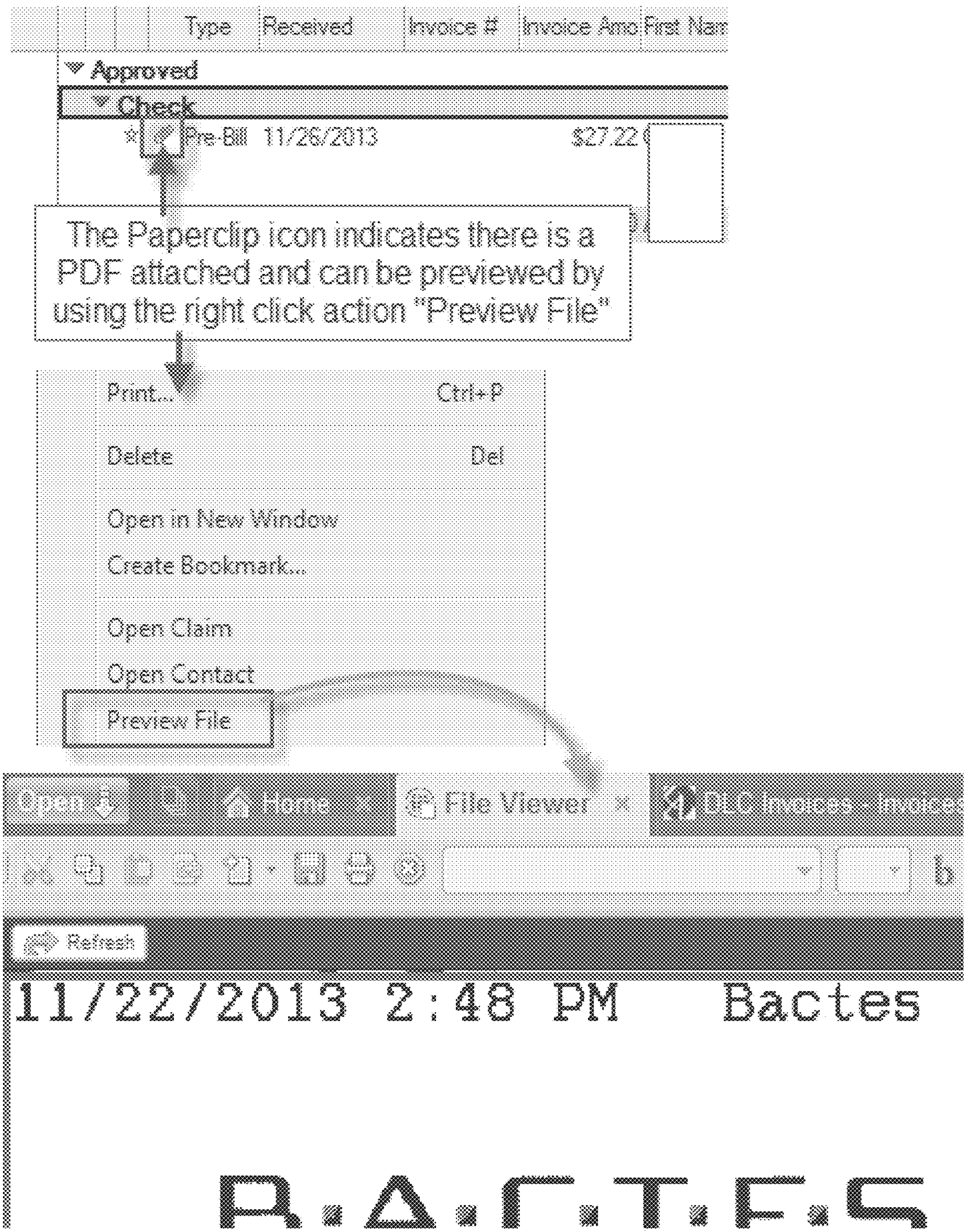

Type
Received
Invoice #
Invoice Amo
First Nam
Approved
Check
Pre-Bill 11/26/2013 $27.22
The Paperclip icon indicates there is a PDF attached and can be previewed by using the right click action "Preview File"
Print... Ctrl+P
Delete Del
Open in New Window
Create Bookmark...
Open Claim
Open Contact
Preview File
Open
Home
File Viewer
DLC Invoices - Invoices
Refresh
11/22/2013 2:48 PM Bactes

Fig. 280a

Section 2: There are several categories within the "Paid" view

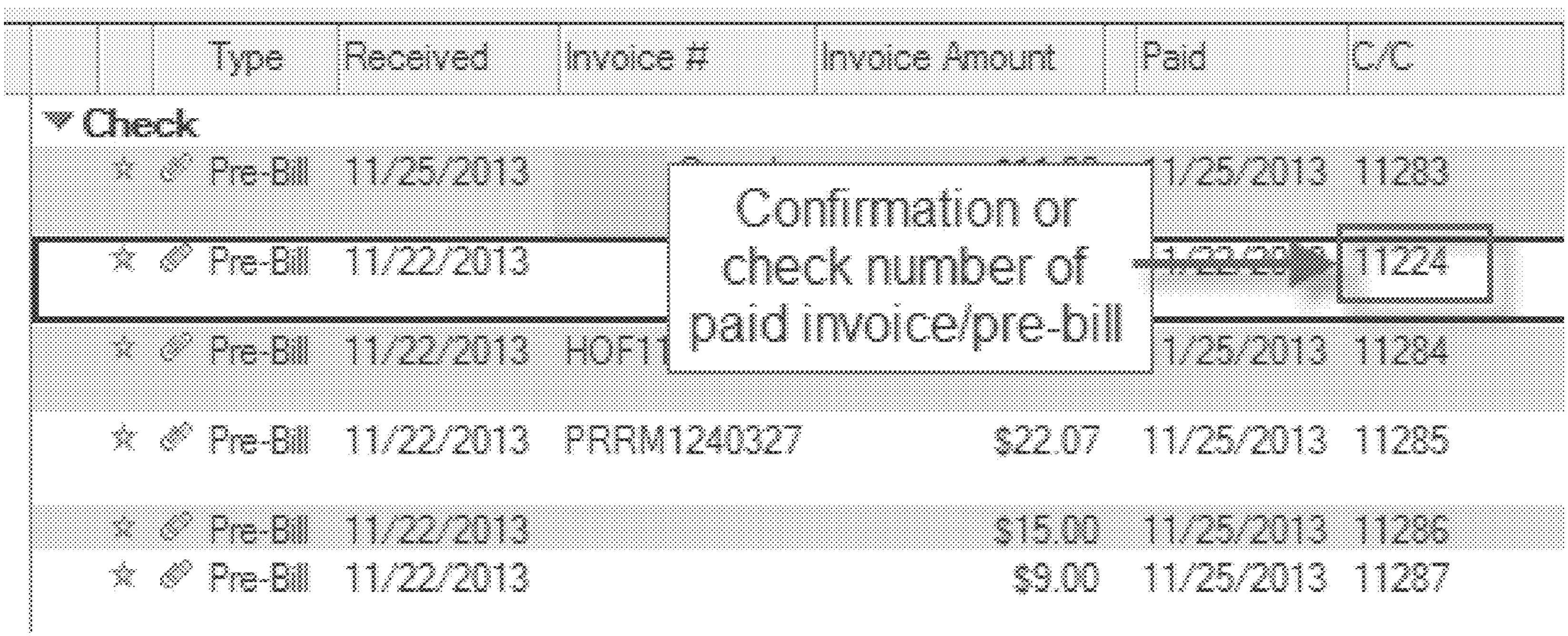


Fig. 280b

Invoice/pre-bills transfer from the To Pay view to the Paid view by completing the dialogue below (multiple invoices can be updated simultaneously to increase user's efficiency)

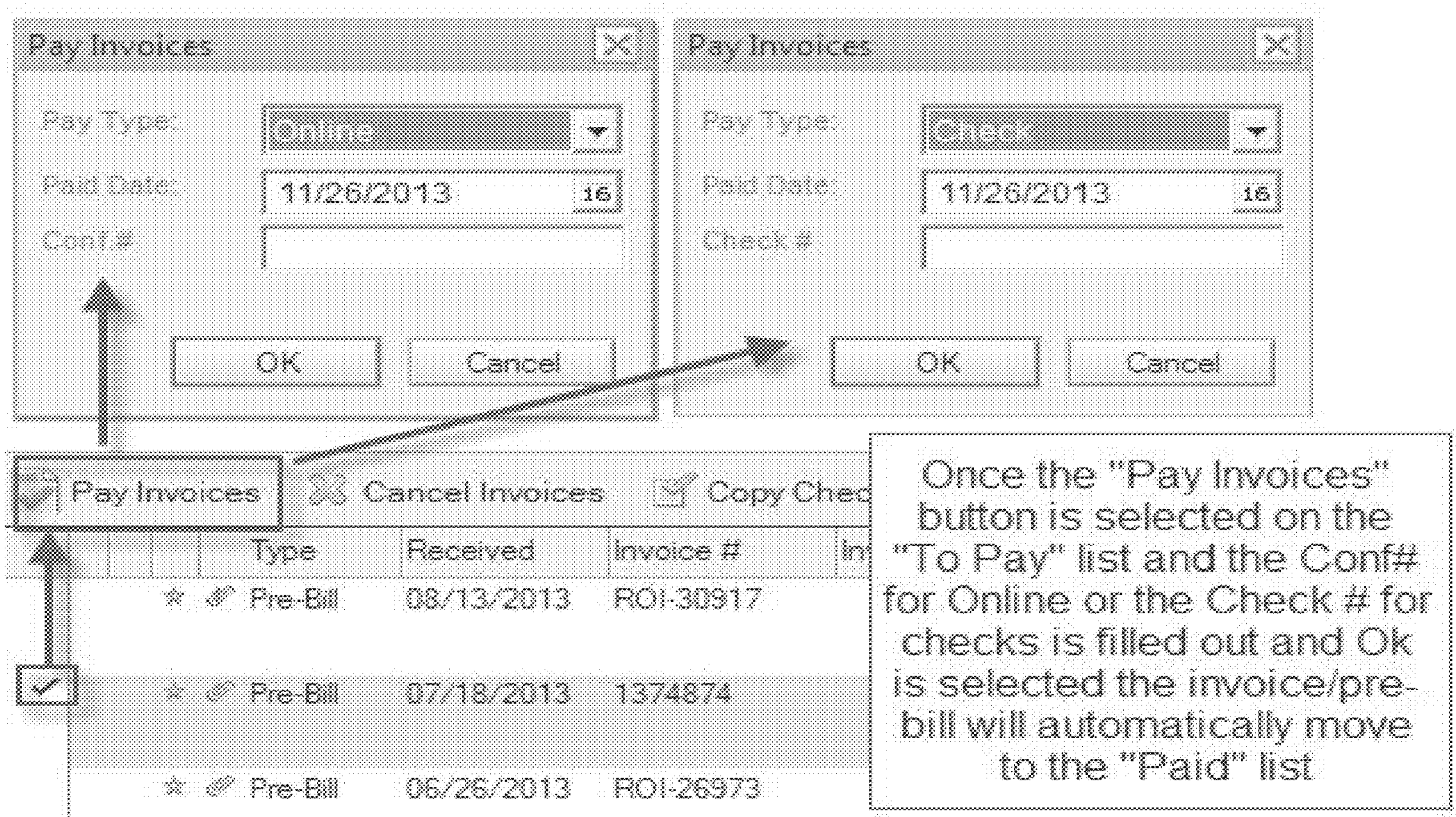


Fig. 281a

Record Tracking System

A critical aspect of the database is tracking records from receipt, through review, to submission. The Received view organizes and provides the user with easy view ability and data making it efficient for several users to review hundreds of records each week. A reviewer has the option to assign Good, Bad, Hold , or Partially Good to a record.

The Received view appears as shown

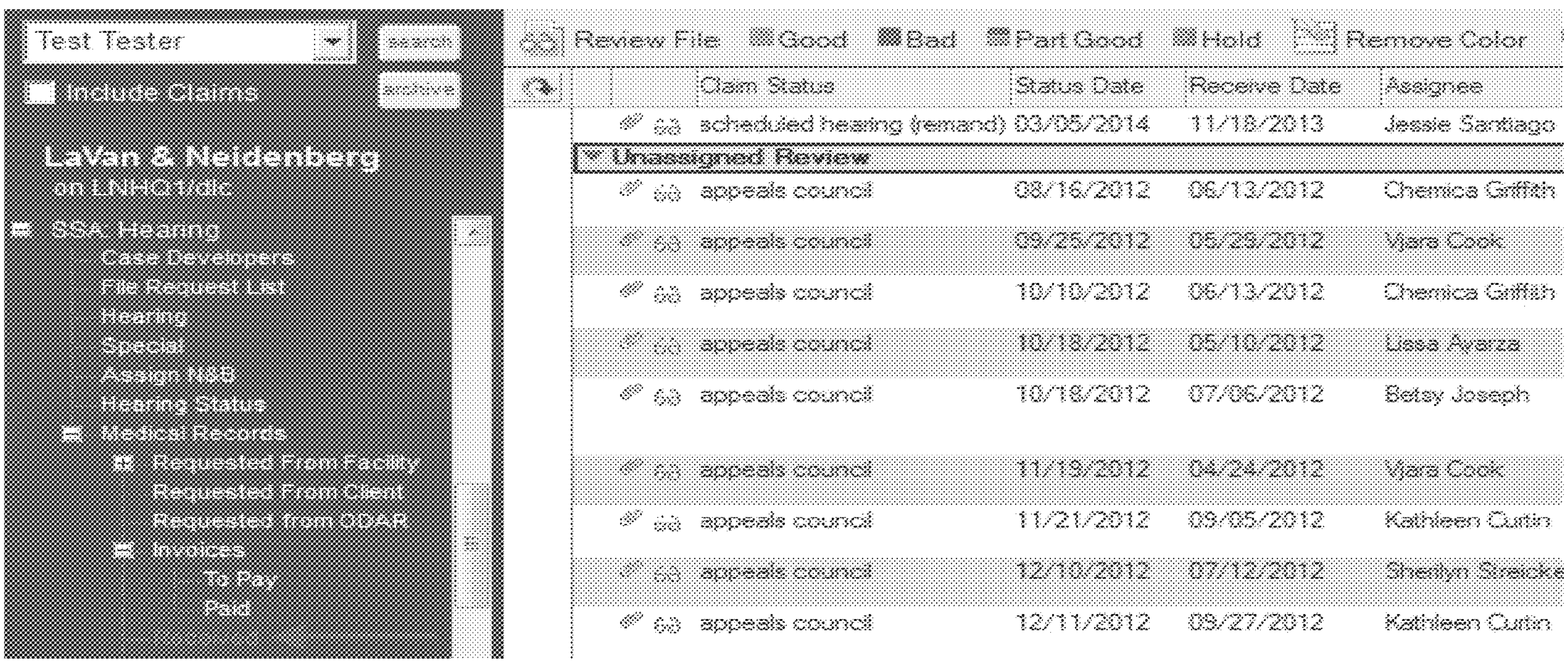


Fig. 281b

The Received view is categorized by the following

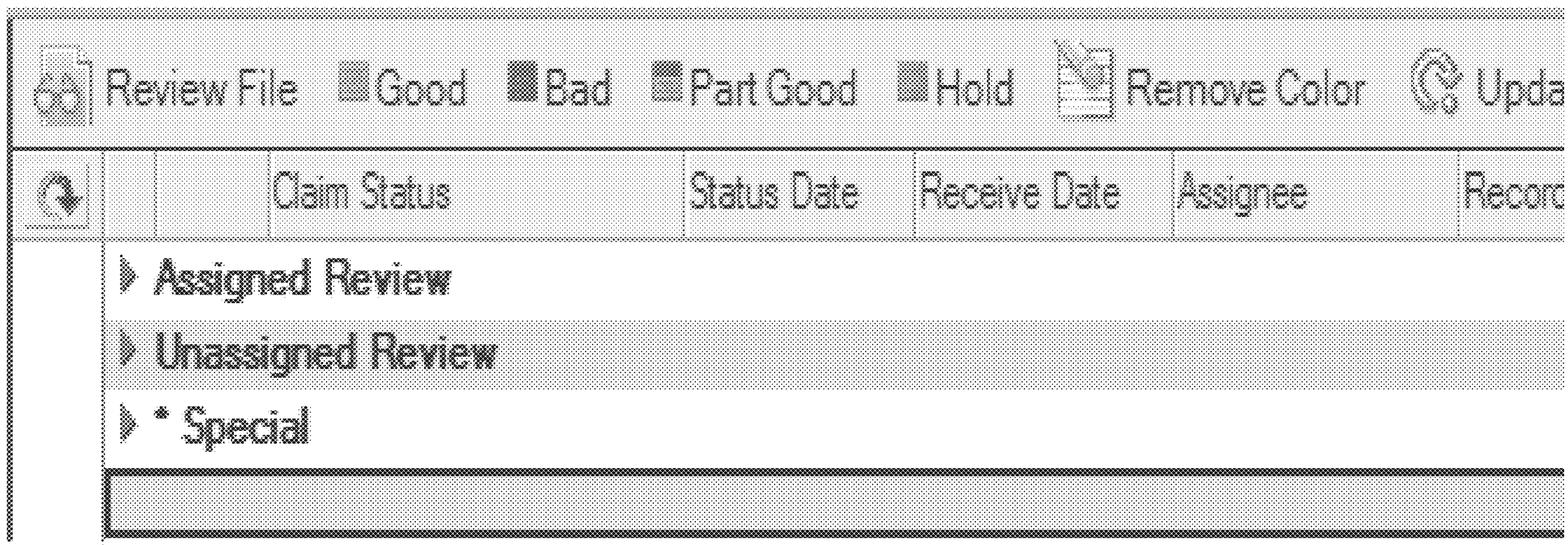


Fig. 282

After expanding one of the categories in the Received view the list will appear as shown

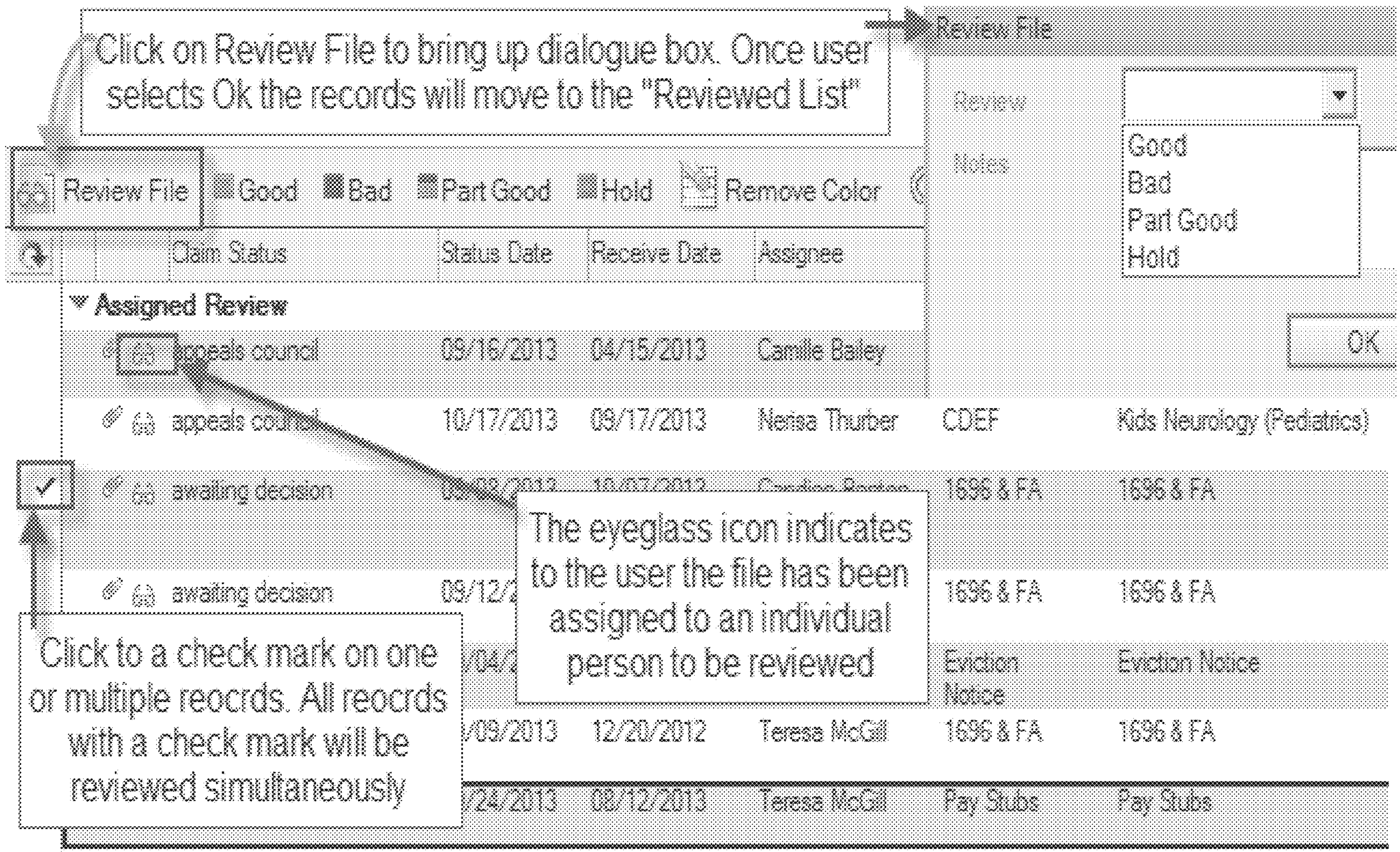


Fig. 283a

Auto-Fax

The purpose of this project is to implement a process that will automatically send via fax any file attached to existing documents in the DLC database that meets a given criteria and recover confirmation information on first page faxed. The group of documents to process as of right now is:

Medical Records

- Any requested medical record with request type = "Fax"
    - When: Immediately
    - Where: To the fax number associated to the doctor/facility
- Any reviewed medical record that meets the following conditions:
    - Contains the word "Good" in the review result
    - Claim Status is included in the list of valid claim statuses
    - Parent claim has an incoming letter of type = "Barcode (DDS)" or "Barcode (ODAR)" with a valid file attachment. (type of letter required will depend on claim status)

Fig. 283b

- When: X days after the date of the current claim status. (number of days will depend on claim status)

- Where: To e-fax number of the DDS or ODAR office (type of office will depend on claim status) The faxed file will contain the office's Barcode attachment, the template cover sheet and configuration medical record attachment.

Symphony templates
Some of the letters that are available for manual generation should be faxed. The symphony template configuration will need a flag that will determine when it needs to be automatically faxed.

When: Immediately

Where: To e-fax number of the configured contact office (type of office depends on symphony template being generated)

Task workflow attachments
Files attached to some tasks once they are completed. However, sometimes only the first page of the file needs to be faxed.

When: Immediately, once the task is completed

Fig. 283c

Where: To e-fax number of the configured contact office. (type of office depends on the specific task definition: if the parent workflow contains a task that generates a symphony template, the *type* of office will de£1ult to the type of office configured for such symphony template)

Confirmations and Check-sheet views

Allow users to select a subset of records and auto-generate/fax a specific template letter that can be selected each time.

When: Immediately

Where: To e-fax number of the office configured for the selected symphony template.

The documents will be faxed and flagged according to the result. The process will run on a scheduled time (probably once a day at a specific time.)

Fig. 284

Fax auto-submit views

Queue view

The system will provide a list (view) of documents pending for processing categorized by type.

Each document in the view will be marked with a "submit status" that provides information about the submit step, for example: "Ready to submit", "Awaiting barcode", etc.

All documents "Ready to submit" will be subject to processing. However, the user will be able to manually remove any document from this queue using a button.

An action will be provided to "re-fax" in bulk a given subset of documents that have been previously submitted.

Each time a document is "re-faxed", its confirmation information needs to be recovered and maintained as a file attachment associated to the document.

If an error occurs during processing, the database administrator will receive a notification containing the list of failures.

History View

Another view needs to be provided to show the history of fax attempts

Fig. 285

Client Web Portal - MyClaimGo.com

With our new client web portal, MyClaimGo.com, we are now able to offer our clients instant access to their claim via the Internet. Our goal is to better serve our clients by giving them access to their file, therefore the claims representatives should encourage our clients to create a user account.

The client will be able to view their contact information, emergency contacts, medical providers, prescriptions, medical conditions, work history, and details about their claim status. They will have access to update, add, or remove information from these categories.

If the client updates, adds, or removes any information the data will be organized in a queue that is managed by L&N staff in an internal Admin Console. If the request is approved by L&N Admin then Lotus will be updated and the information will then be reflected on MyClaimGo.com when the client logs in.

Fig. 286

REGISTRATION

The client will need to follow all screen prompts and enter their information:

If client has not registered they will need to click "Register to use the site":

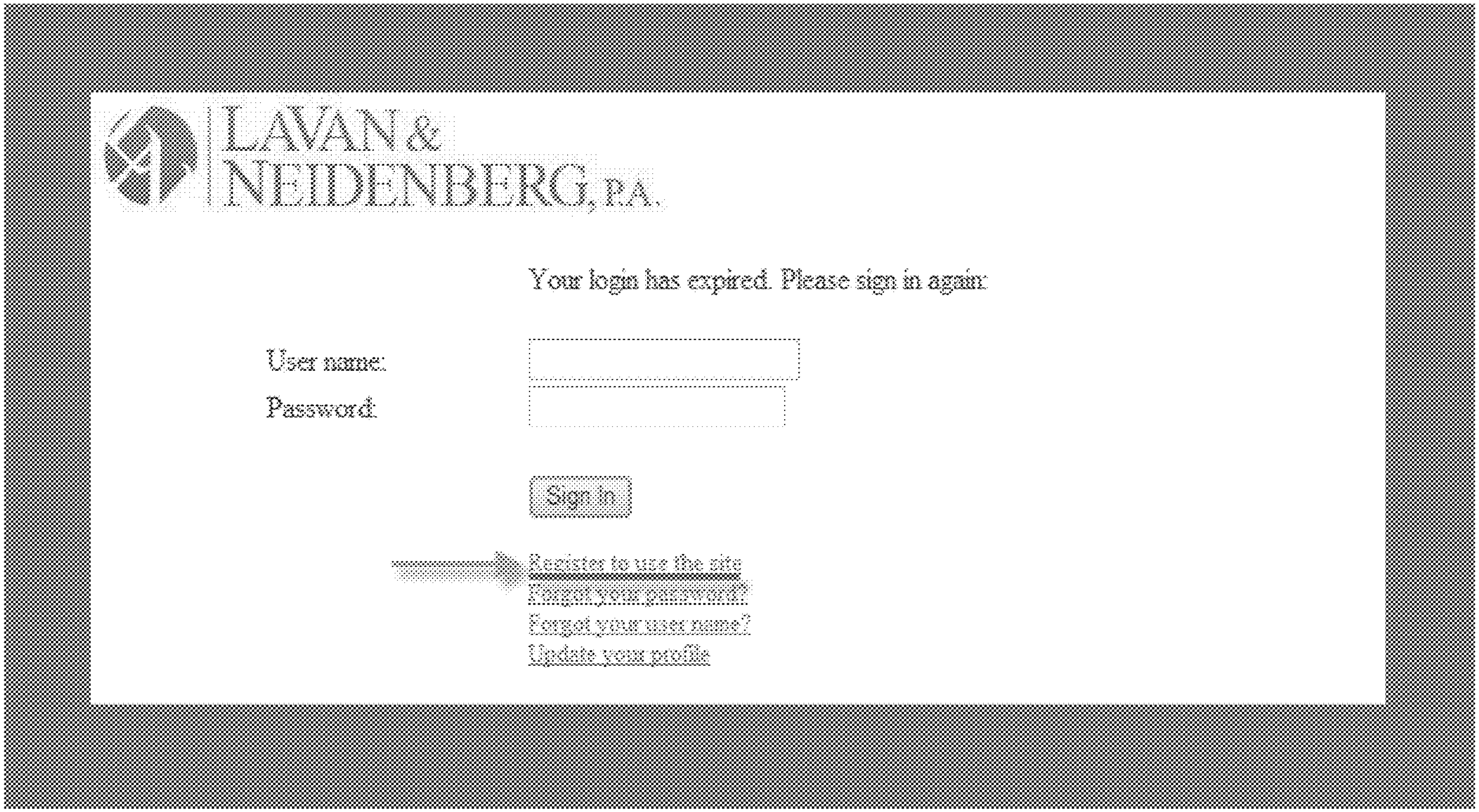


Fig. 287

Registration Step 1:

Fig. 288a

Registration Step 2:

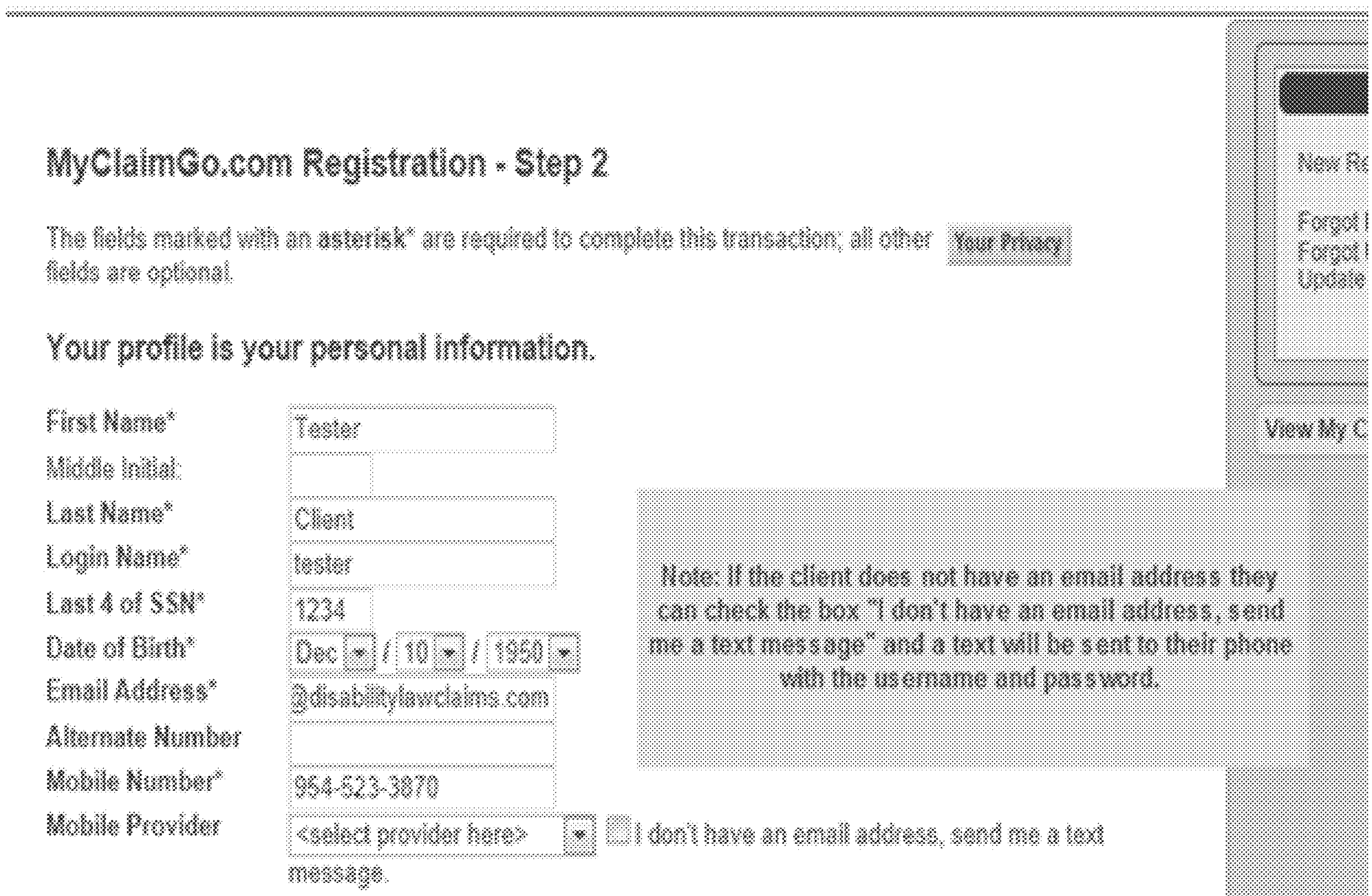


Fig. 288b

Registration Step 2 (continued):

General Registration Information

Password*	•••••••	* Use a minimum of 6 characters
Confirm Password*	•••••••	
Challenge word*	test4me	* Needed in case you forget your password

Privacy Terms* Checking the box below indicates that you have read and agree to the privacy terms explained in the "Your Privacy" link at the top of the page. You cannot register on the site without accepting the terms.

☑ Accept Privacy Terms

Continue Clear Entries

Fig. 289

The client will receive a confirmation email (or text message if they choose that option):

MyClaimGo.com Registration Confirmation
registration to: mfuller

Dear Tester:

Your MyClaimGo.com Registration has been successfully processed.

Your username is: Tester Client
Your password is: test4me

Email: mfuller@disabilitylawclaims.com
Mobile: 954-523-3870

If you need to update this information, use our Registration page at:
https://servername.com/registration.nsf/regchoice

Thanks for using our site!
MyClaimGo.com Team
http://www.disabilitylawclaims.com

Fig. 290

Once the client receives their confirmation email they will need to return to the Portal home page to enter their Username and Password and click Sign In:

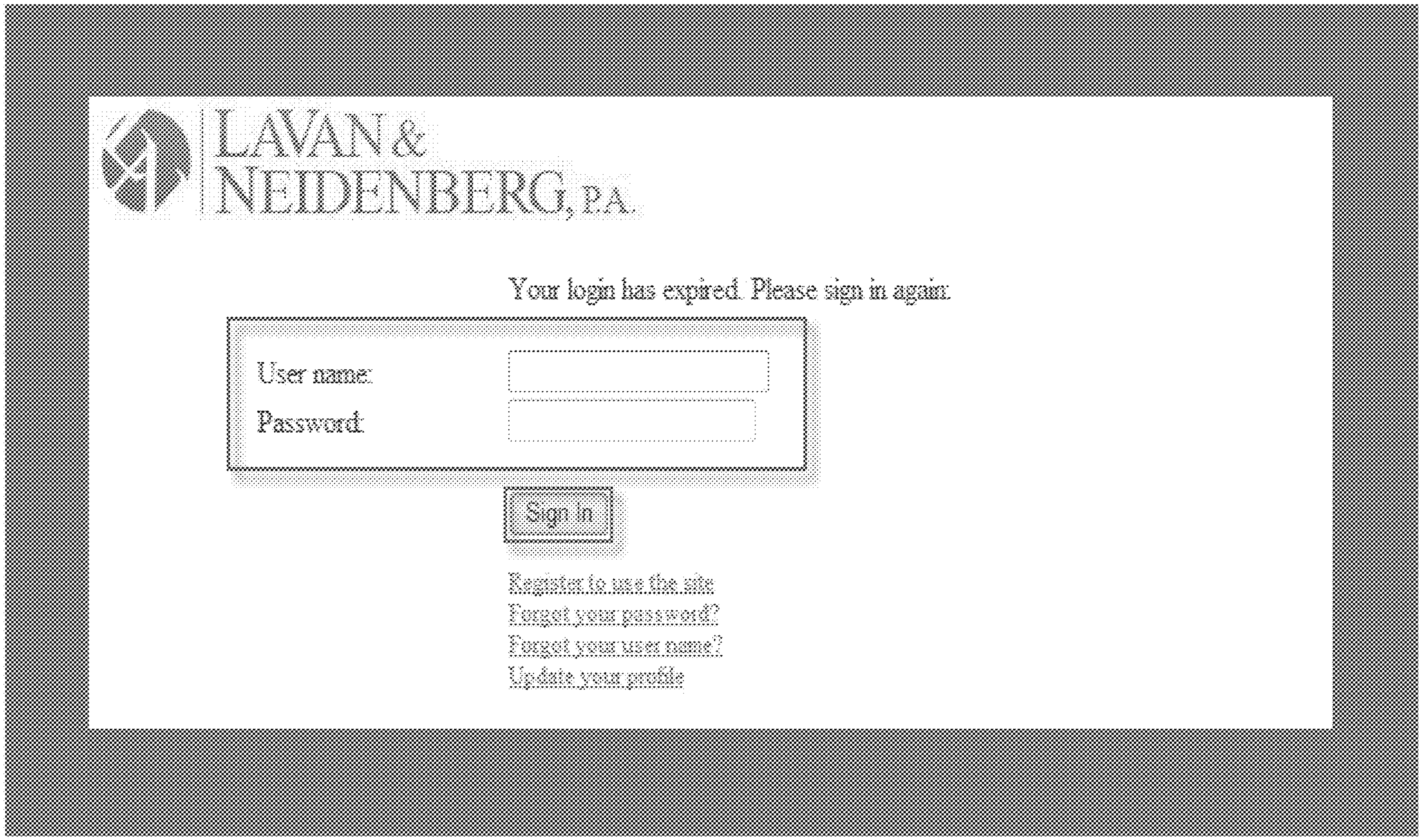


Fig. 291

Once the client logs in they will be directed to this page:

Fig. 292a

Client will be able to click on each category (Emergency Contacts, Medical Treatments, Prescriptions, Medical Conditions, Work History, Details) and update, edit, or remove information.

Adding, Updating, or Removing Information

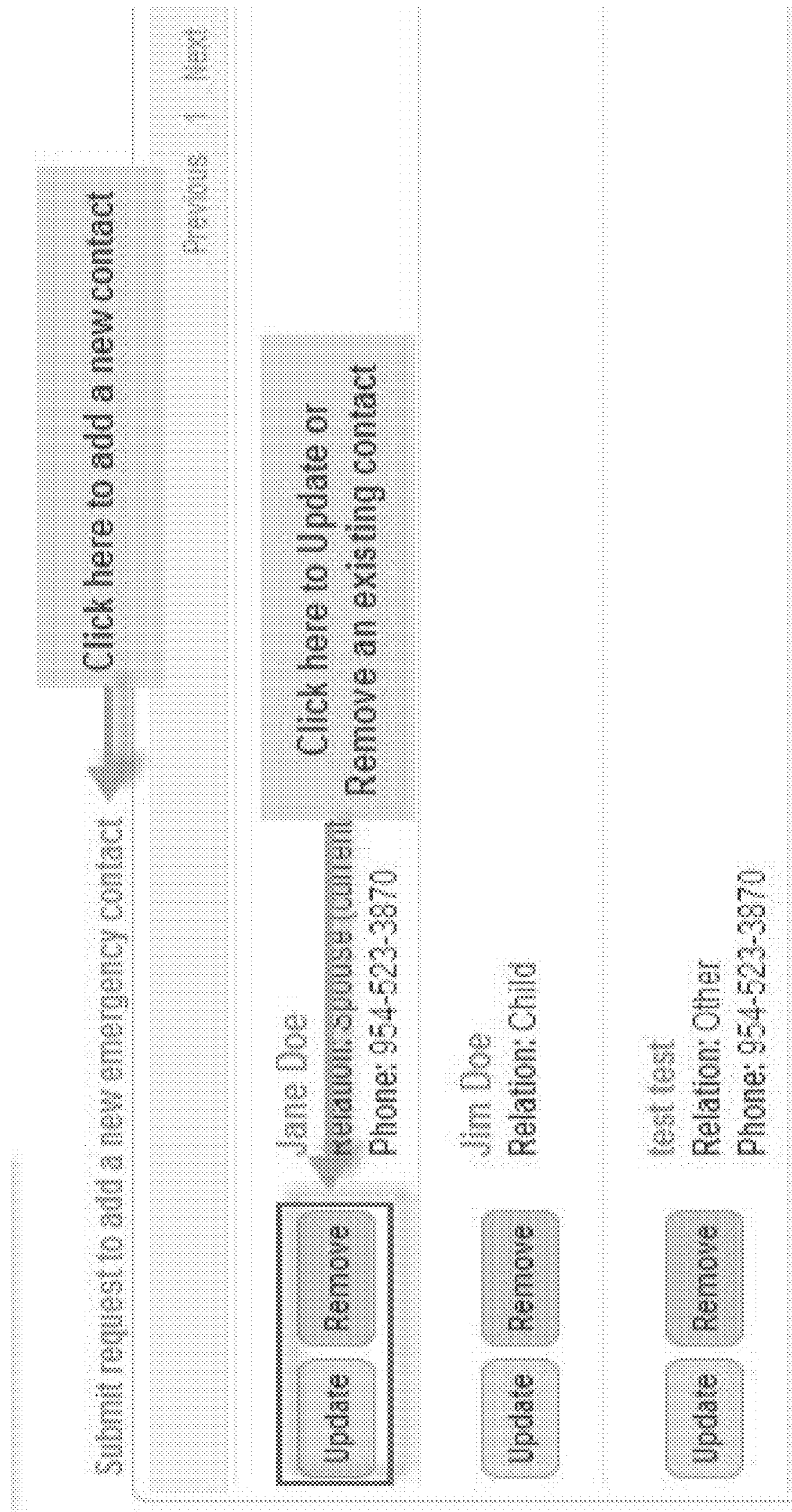

Submit request to add a new emergency contact
Click here to add a new contact
Previous 1 Next
Click here to Update or Remove an existing contact
Update
Remove
Jane Doe
Phone: 954-523-3870
Update
Remove
Jim Doe
Relation: Child
Update
Remove
test test
Relation: Other
Phone: 954-523-3870

Fig. 292b

Fig. 293

Client will complete all necessary fields and click Save

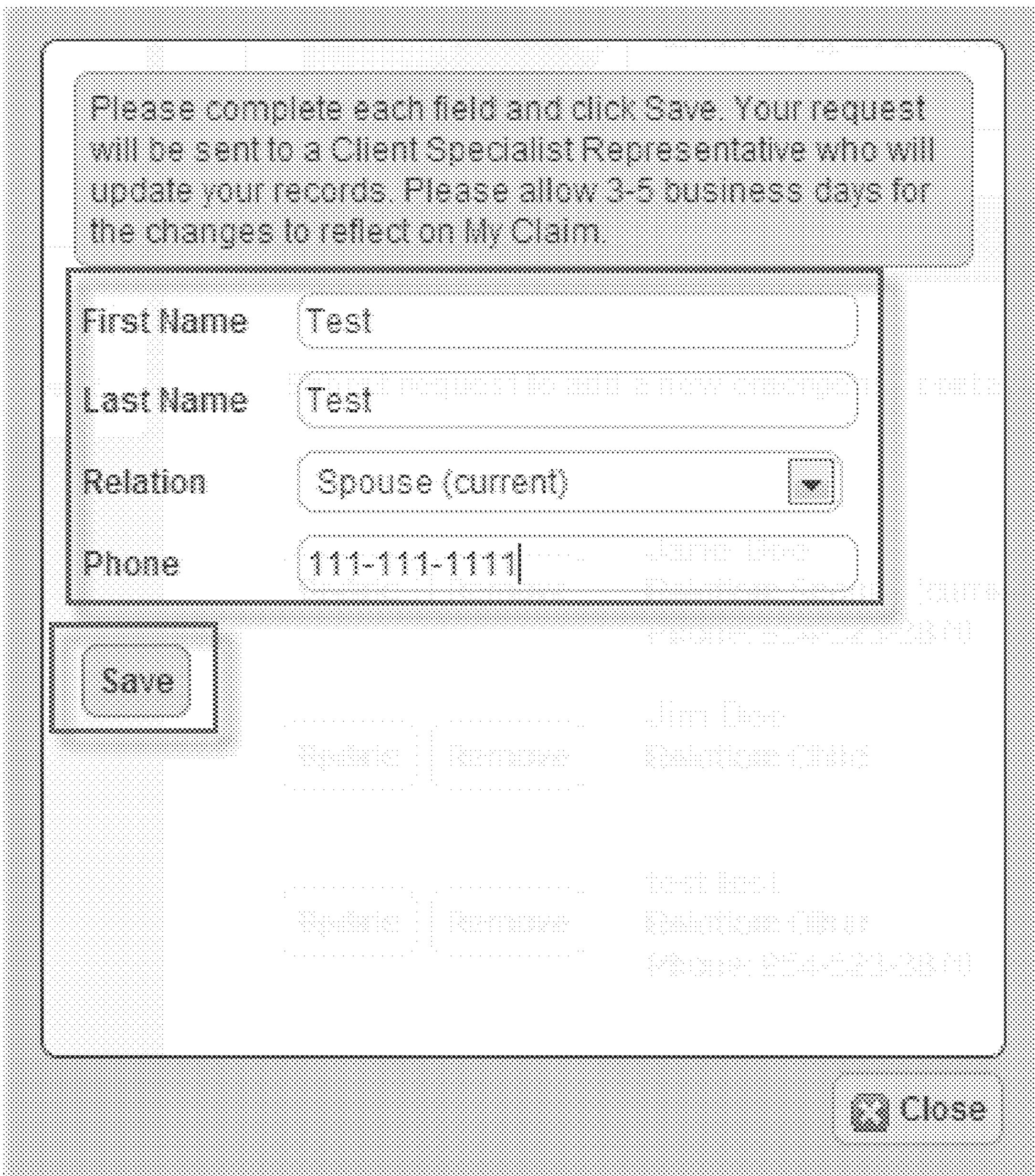


Fig. 294

Once they click Save they receive a notification that their request to add a contact has been received

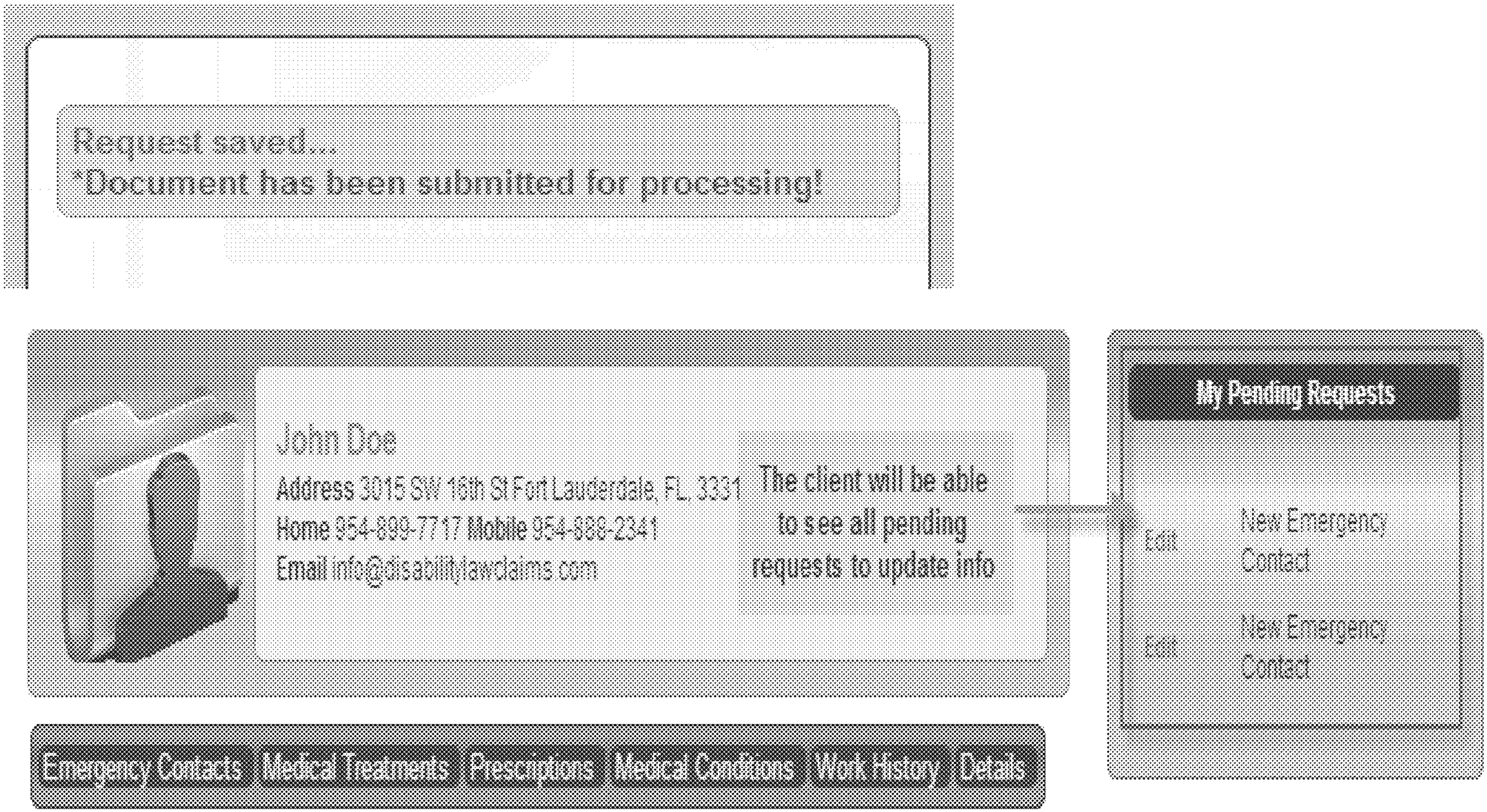


Fig. 295

Claim Status

The client will be able to view their Claim Status(es). A brief description is provided under the Claim Status so the client will have a clear definition of what status their claim is at. The client can also view their Claim Status Progression.

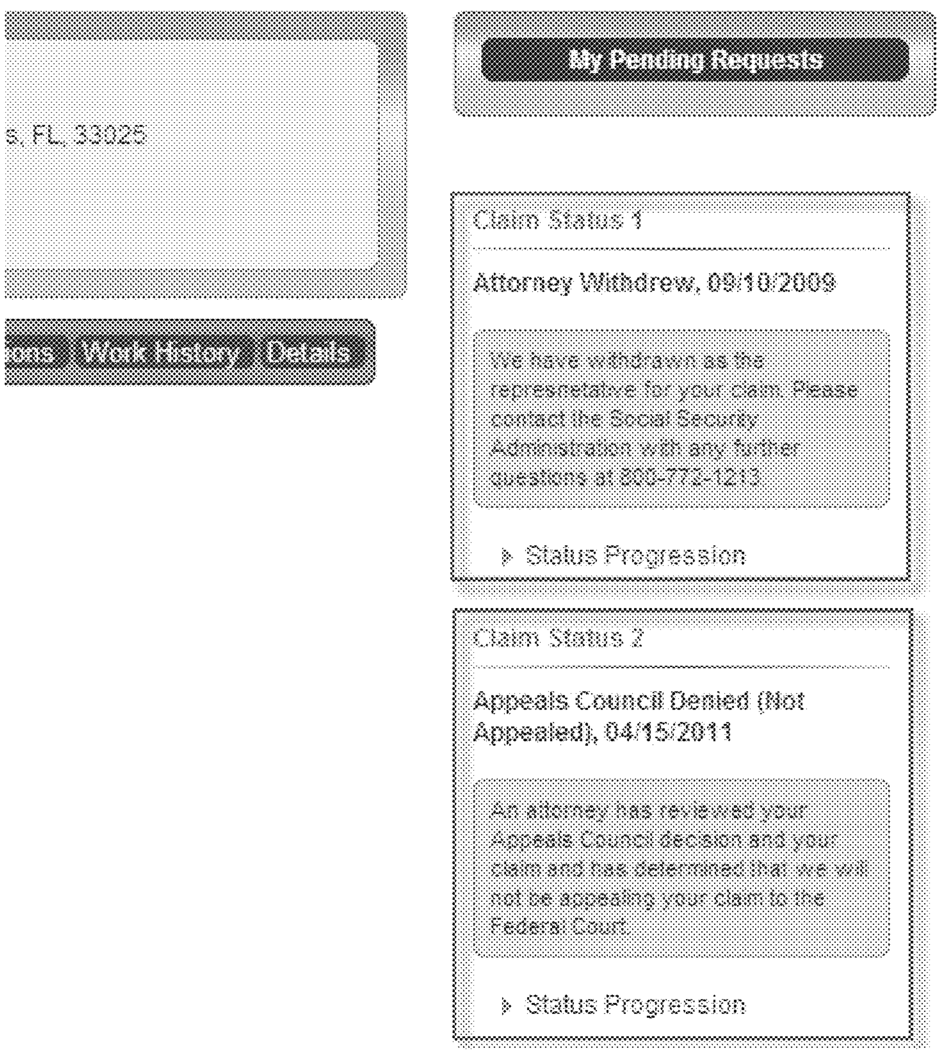


Fig. 296

Additional Comments

If the client needs to update, add, or remove information other than what is shown on the Portal they can enter the information in Additional Comments

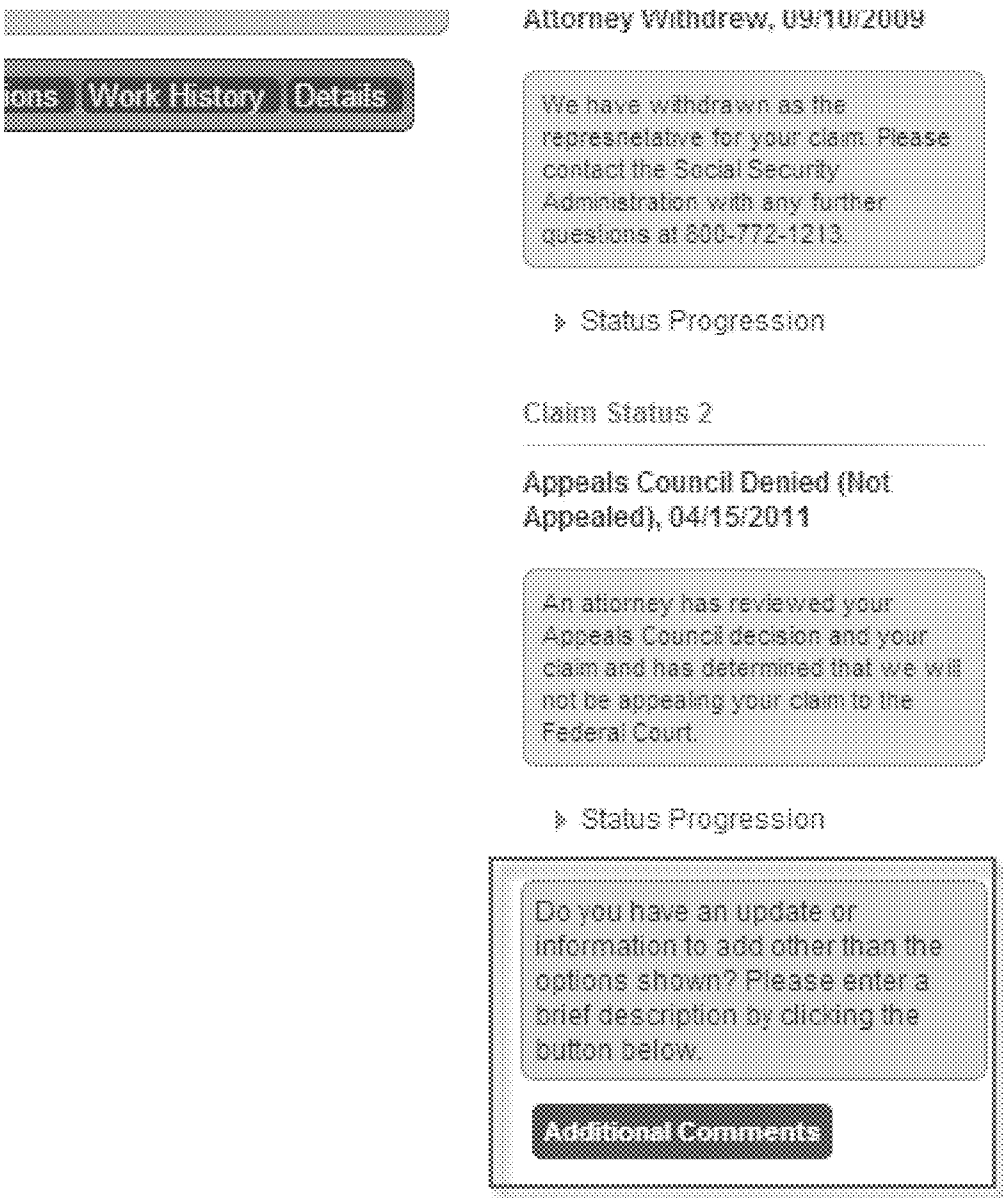


Fig. 297

Client Portal Admin Console

Each time a client enters a request to update, add, or remove information while logged into the Client Portal the request is sent to our Admin Console. A user checks the console daily and updates, adds, or removes, the information accordingly.

The user will log into the Admin Console from MyClaimGo.com.

Fig. 298

The User will assign pending requests to themselves to complete. That way more than one user can work in the Admin Console at the same time.

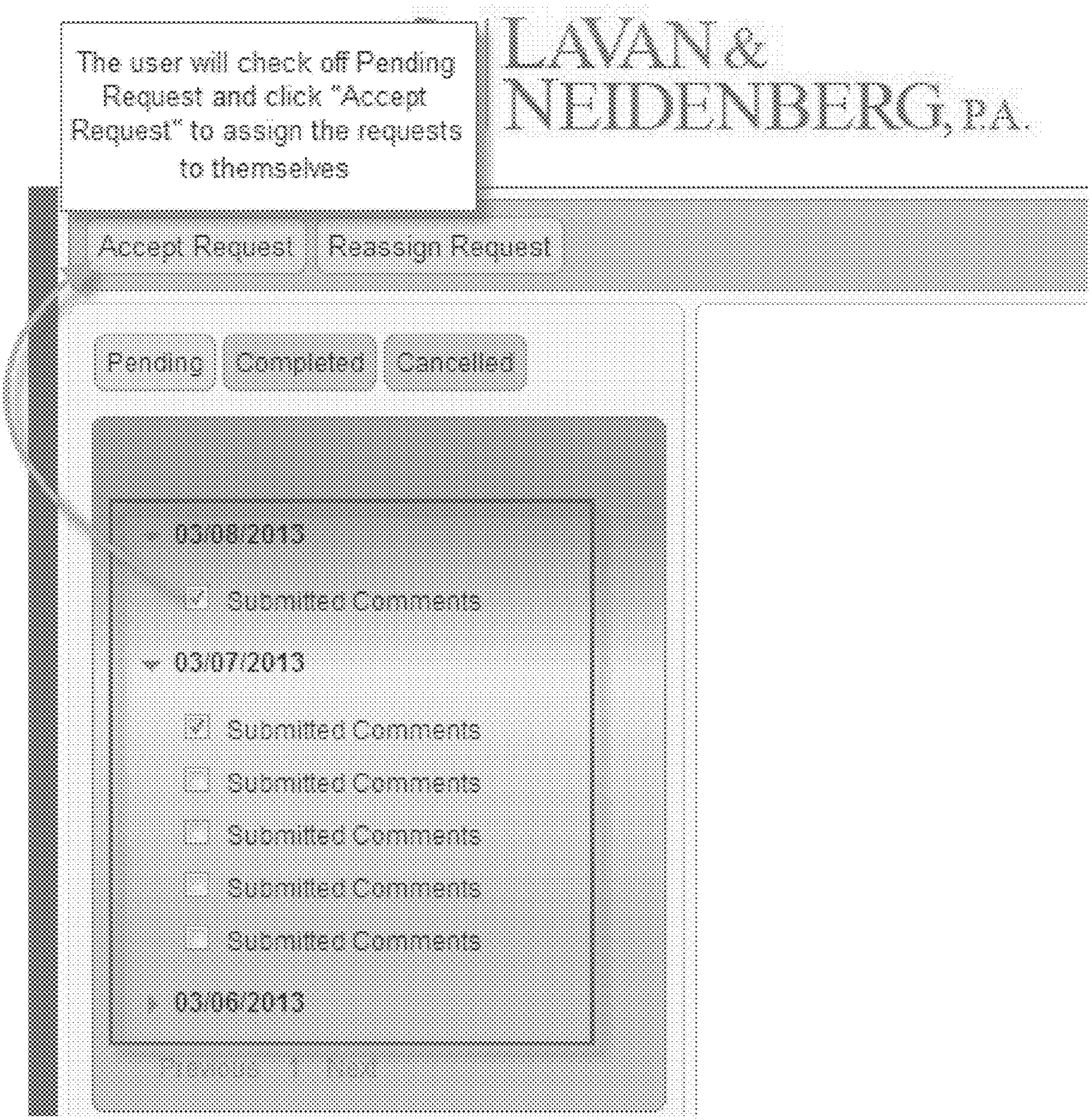


Fig. 299

The requests assigned to each user will appear in a panel called "Requests Assigned To Me". The user can click on Edit to view the request.

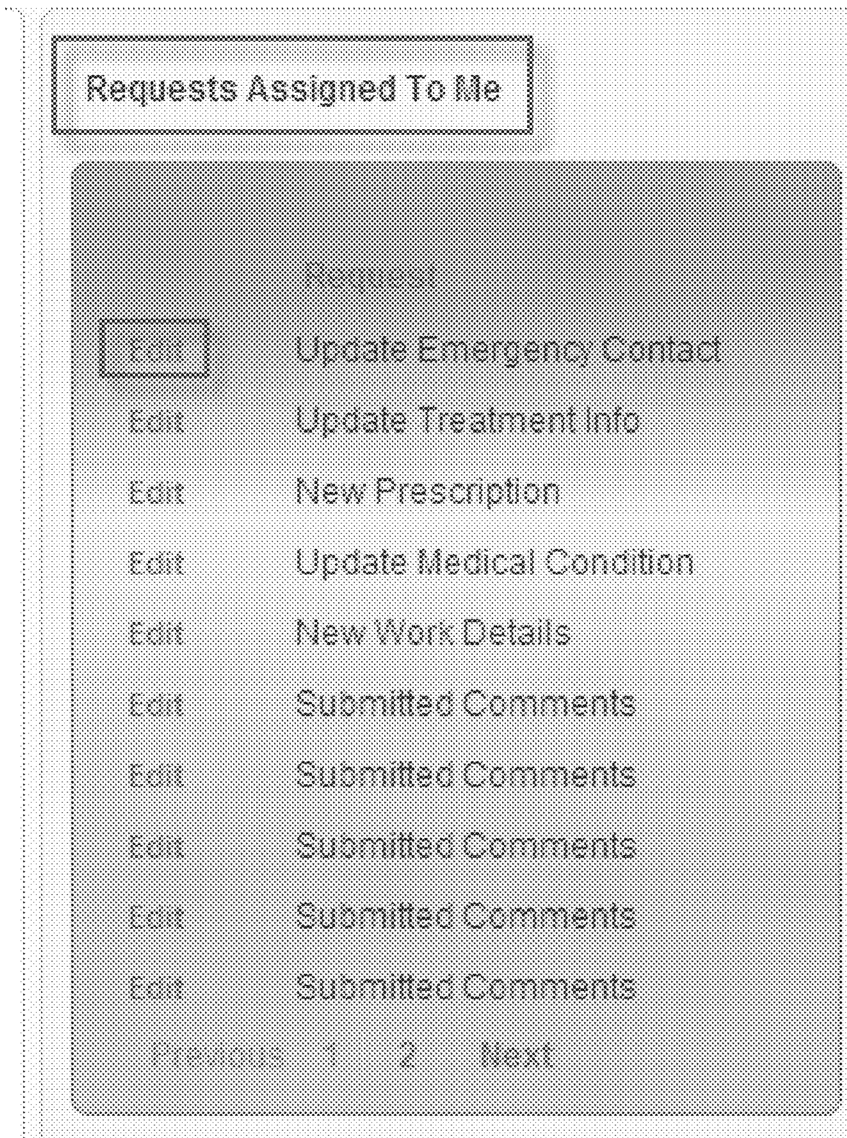


Fig. 300

The user will be able to view the clients request and determine if the information needs to be updated in Lotus. The user will then Complete or Cancel the request accordingly.

Fig. 301

Once the request is Completed or Cancelled the information is stored under the Completed or Cancelled tabs.

CLAIM AND PROGRESSION MANAGEMENT

PRIORITY CLAIM

[0001] In accordance with 37 C.F.R. 1.76, a claim of priority is included in an Application Data Sheet filed concurrently herewith. Accordingly, the present invention claims priority as a continuation of U.S. patent application Ser. No. 14/586,609 entitled "CLAIM AND PROGRESSION MANAGEMENT", filed on Dec. 30, 2014, which claims the benefit of U.S. patent application Ser. No. 13/843,743, entitled "CLAIM AND PROGRESSION MANAGEMENT", filed on Mar. 15, 2013, which claims the benefit of priority of U.S. Provisional Patent Application No. 61/619,049, entitled "SOCIAL SECURITY CLAIM AND PROGRESSION MANAGEMENT", filed on Apr. 2, 2012. The contents of which the above referenced application is incorporated herein by reference in its entirety.

FIELD OF THE INVENTION

[0002] The present invention relates to a system and method for submitting and processing benefit claims, such as Social Security claims. The present invention permits the user to make the initial application for benefits, respond to denials of benefits, if necessary, and appeal negative decisions.

BACKGROUND OF THE INVENTION

[0003] Government agencies have developed rules and regulations for applying for and receiving government benefits. These agencies also have developed rules and procedures for adjudication of disability requests. In particular, the Social Security Administration receives probably the most requests for retirement and disability benefits of all of the government agencies which pay out benefits. Medicare provides health insurance under Title XVIII of the Social Security act. Therefore, the Social Security Administration must process Medicare claims in addition to retirement claims. There is also the Social Security Disability Insurance program which handles disability claims and benefits for those individuals who qualify. Again, there are rules and procedures for the processing of these disability claims. There are businesses, in particular law firms that file for Social Security benefits on behalf of their clients. Currently, this is a very tedious, difficult, and time consuming process. This process becomes even more difficult when the conditions under which the initial benefit claim was made changes. For example, when a claim for a medical benefit has initially been made and there is a change in the medical condition of the claimant, different forms need to be completed and specific procedures need to be followed. Also, if a claim or claims for benefits have been denied, there are specific procedures that need to be followed to properly appeal the denial decision of the Social Security Administration or other government agencies.

[0004] Thus, what is needed in the art is a process for filing benefit claims with the Social Security Administration, or other government agencies, which can follow the proper claim procedures to assure the claimant receives the benefits that he/she is entitled to. Also a process that will enable filing of updated and/or changes in status of benefits. Further, a process that will assure a proper and correct filing of an appeal for denial of certain benefits.

DESCRIPTION OF THE PRIOR ART

[0005] U.S. Published Patent Application No. 2011/0077981 discloses a method and system for automated processing of medical data for insurance and disability determinations.

[0006] U.S. Published Patent Application No. 2003/0158750 discloses a computer implemented process and system for processing compensation requests.

[0007] U.S. Published Patent Application No. 2008/0059249 discloses a system and process for storing healthcare information, records, or history of an individual or healthcare provider.

[0008] U.S. Published Patent Application No. 2010/0145734 discloses a computer based automated loss verification system for evaluating the validity of claims filed under an insurance policy or debt protection contract.

[0009] U.S. Published Patent Application No. 2010/0185466 discloses a method for tracking health related spending for validation of disability benefits claims. The method includes tracking, by the Medicare Secondary Payer statute-compliance company, healthcare related expenditures by the recipient.

[0010] U.S. Published Patent Application No. 2003/0167220 discloses a computer aided method of computing coverage benefit costs for a retirement plan having respective accounts for individuals.

[0011] U.S. Published Patent Application No. 2002/0035488 discloses a system and method of administering, tracking, and managing claim processing.

[0012] U.S. Published Patent Application No. 2009/0222290 discloses a system for automated, predictive modeling of the outcome of benefits claims including a profile generator, an evaluation component, and a case management application.

[0013] U.S. Published Patent Application No. 2009/0192827 discloses a rules based system for information relating to health or retirement benefits. The information is stored in the form of statements or clauses relating to financial, medical, or personal characteristics relevant to certain statures or regulations.

[0014] U.S. Patent Application No. 2008/0010279 discloses a system and method of educational accountability reporting for Federal, State, and local initiatives such as the Federal No Child Left Behind (NCLB) program. The system also includes a detailed process for handling appeals and reconsiderations of disputed assessments or demographic data being utilized for the calculation of statistics.

[0015] U.S. Published Patent Application No. 2010/0318393 discloses a system and method for dispatching a workflow responsive request including a plurality of dispatch rules which may be defined based on a user's input.

[0016] U.S. Pat. No. 7,753,263 discloses a method and system for automatic case determination and assignment for a business transaction.

[0017] U.S. Published Patent Application No. 2003/0074277 discloses a method for processing an application from a user for a product using a first computer. The information is sent to a second computer for processing. The computers can be a client and a server respectively.

[0018] U.S. Pat. No. 7,600,252 discloses a system, method, and computer program for providing communication between different devices having similar or different characteristics and facilitating seamless operability between the devices.

[0019] U.S. Pat. No. 7,185,273 discloses a method for the completion of forms including receiving location information, retrieving user information, configuring the user information for merging with the form, and printing a form that contains at least some of the user information.

SUMMARY OF THE INVENTION

[0020] The present invention is a computer implemented method and system for gathering information from a user related to, filing for, and obtaining government benefits, such as Social Security benefits. The present invention also enables the user to track the benefit application approval process and reminders when certain data or responses are due. There is a feature which enables the user to modify the data submitted for the benefits when circumstances warrant. The system presents questions in a systematic method to reduce the time it takes to complete an intake. Based on answers provided, the intake wizards guides the user through appropriate questions to ask based on the previous answers provided. for example if the potential client is a veteran the intake will ask service related questions that can be evaluated for an SSA claim and/or VA claim. If an answer disqualifies the claimant from SSDI or SSI for a "technical" reason, the questionnaire is terminated so that the user can move on to the next intake quickly and efficiently. If an answer does not disqualify the claimant from the intake process, the intake moves onto the next sections of the questionnaire. The system assists the user in computing what stage in the process the claimant is currently at. For example, Needs to File an Application, Initial Application, Denied Initial Claim, Reconsideration, Denied Reconsideration, Hearing Filed, Ready to Schedule a Hearing, Hearing Scheduled, Awaiting Decision, Appeals Council, or Federal Claim (many claimants get confused and this is an important part of the application process). Questions are presented related to the claimant's medical history to determine if the user has a valid claim for benefits. The system may in certain instances medically approve the client for representation. When an intake is accepted, the intake wizard assigns the intake to a person responsible for getting the retainer signed, the intake system programmatically fills in SSA forms for the client to sign, emails the forms when appropriate, determines what SSA district office is assigned to the claimant, and then programmatically completes the three SSA Application forms when appropriate. There is also a decision appeal process feature.

[0021] Accordingly, it is an objective of the present invention to provide a computer implemented method and system for inputting data into a government benefits system.

[0022] It is a further objective of the present invention to provide an intake wizard which permits a user to automatically populate a form by input data related to obtaining government benefits, including medical conditions.

[0023] It is yet another objective of the present invention to provide an intake wizard which assists a user in responding to denial of government benefits.

[0024] It is a still further objective of the present invention to provide an import wizard which handles incoming mail, outgoing mail, workflow documents, medical records, document attachments, and collections.

[0025] It is a still further objective of the present invention to provide an application wizard which enables a user to correction complete an application form for government benefits.

[0026] It is a still further objective of the present invention to provide a computer implemented method and system which enables multiple individuals to file on behalf of multiple users for government benefits, maintain the records of these users and respond to different requests and/or information from a government agency regarding the application for the users' benefits requests.

[0027] Other objectives and advantages of this invention will become apparent from the following description taken in conjunction with any accompanying drawings wherein are set forth, by way of illustration and example, certain embodiments of this invention. Any drawings contained herein constitute a part of this specification and include exemplary embodiments of the present invention and illustrate various objects and features thereof.

BRIEF DESCRIPTION OF THE FIGURES

[0028] FIGS. **1A-1**F is a benefit claim progression flow chart;

[0029] FIG. **2** is a claim progression view;

[0030] FIG. **3** is a screen shot of a claim progression view;

[0031] FIG. **4** is a screen shot of a claim progression view;

[0032] FIG. **5** is workflow view;

[0033] FIG. **6** is a screen shot of a workflow view;

[0034] FIG. **7** is a screen shot of a workflow view;

[0035] FIG. **8** is a screen shot of a workflow view;

[0036] FIG. **9** is a screen shot of a workflow view;

[0037] FIG. **10** is a screen shot of a workflow view;

[0038] FIG. **11** is a screen shot of a workflow view;

[0039] FIG. **12** is a screen shot of a workflow view;

[0040] FIG. **13** is a screen shot of a workflow view;

[0041] FIG. **14** is a screen shot of a workflow view;

[0042] FIG. **15** is a screen shot of an Intake Wizard;

[0043] FIG. **16** is a screen shot of an Intake Wizard;

[0044] FIG. **17** is a screen shot of an Intake Wizard;

[0045] FIG. **18** is a screen shot of an Intake Wizard;

[0046] FIG. **19** is a screen shot of an Intake Wizard;

[0047] FIG. **20** is a screen shot of an Intake Wizard;

[0048] FIG. **21** is a screen shot of an Intake Wizard;

[0049] FIG. **22** is a screen shot of an Intake Wizard;

[0050] FIG. **23** is a screen shot of an Intake Wizard;

[0051] FIG. **24** is a screen shot of an Intake Wizard;

[0052] FIG. **25** is a screen shot of an Intake Wizard;

[0053] FIG. **26** is a screen shot of an Intake Wizard;

[0054] FIG. **27** is a screen shot of an Intake Wizard;

[0055] FIG. **28** is a screen shot to an Intake Wizard;

[0056] FIG. **29** is a screen shot of an Intake Wizard;

[0057] FIG. **30** is a screen shot of an Intake Wizard;

[0058] FIG. **31** is a screen shot of an Intake Wizard;

[0059] FIG. **32** is a screen shot of medical conditions on the Intake Wizard;

[0060] FIG. **33** is a screen shot of medical conditions on the Intake Wizard;

[0061] FIGS. **34***a*-**34***b* are charts explaining the termination reasons;

[0062] FIG. **35** is screen shot of termination reasons;

[0063] FIG. **36** is screen shot of termination reasons;

[0064] FIGS. **37***a*-**37***b* are a screen shot of termination reasons;

[0065] FIGS. **38***a*-**38***b* are a screen shot of termination reasons;

[0066] FIG. **39** is a screen shot of an Import Wizard;

[0067] FIG. **40** is a screen shot of an Import Wizard;

[0068] FIG. **41** is a screen shot of an Import Wizard;

[0069] FIG. **42** is a screen shot of an Import Wizard;
[0070] FIG. **43** is a screen shot of an Import Wizard;
[0071] FIG. **44** is a screen shot of an Import Wizard;
[0072] FIG. **45** is a screen shot of an Import Wizard;
[0073] FIG. **46** is a screen shot of an Import Wizard;
[0074] FIG. **47** is a screen shot of an Import Wizard;
[0075] FIG. **48** is a screen shot of an Import Wizard;
[0076] FIG. **49** is a screen shot of an Import Wizard;
[0077] FIG. **50** is a screen shot of an Import Wizard;
[0078] FIG. **51** is a screen shot of an Import Wizard;
[0079] FIG. **52** is a screen shot of an Import Wizard;
[0080] FIG. **53** is a screen shot of an Import Wizard;
[0081] FIG. **54** is a screen shot of an Import Wizard;
[0082] FIGS. **55***a*-**55***b* are a screen shot of an Import Wizard;
[0083] FIG. **56** is a screen shot of an Import Wizard;
[0084] FIG. **57** is a screen shot of an Import Wizard;
[0085] FIG. **58** is a screen shot of an Import Wizard;
[0086] FIG. **59** is a screen shot of an Import Wizard;
[0087] FIG. **60** is a screen shot of an Import Wizard;
[0088] FIG. **61** is a screen shot of an Import Wizard;
[0089] FIG. **62** is a screen shot of an Import Wizard;
[0090] FIG. **63** is a screen shot of an Import Wizard;
[0091] FIG. **64** is a screen shot of an Import Wizard;
[0092] FIG. **65** is a screen shot of an Import Wizard;
[0093] FIG. **66** is a screen shot of an Import Wizard;
[0094] FIGS. **67***a*-**67***b* are a screen shot of an Import Wizard;
[0095] FIG. **68** is a screen shot of an Import Wizard;
[0096] FIG. **69** is a screen shot of an Import Wizard;
[0097] FIGS. **70***a*-**70***b* are a screen shot of an Import Wizard;
[0098] FIG. **71** is a screen shot of an Import Wizard;
[0099] FIG. **72** is a screen shot of an Import Wizard;
[0100] FIG. **73** is a screen shot of an Import Wizard;
[0101] FIG. **74** is a screen shot of an Import Wizard;
[0102] FIG. **75** is a screen shot of an Import Wizard;
[0103] FIGS. **76***a*-**76***b* are a screen shot of an Import Wizard;
[0104] FIG. **77** is a screen shot of an Import Wizard;
[0105] FIG. **78** is a screen shot of an Import Wizard;
[0106] FIG. **79** is a screen shot of an Import Wizard;
[0107] FIG. **80** is a screen shot of an Import Wizard;
[0108] FIG. **81** is a screen shot of an Import Wizard;
[0109] FIG. **82** is a screen shot of an Import Wizard;
[0110] FIG. **83** is a screen shot of an Import Wizard;
[0111] FIG. **84** is a screen shot of an Import Wizard;
[0112] FIG. **85** is a screen shot of an Import Wizard;
[0113] FIG. **86** is a screen shot of an Import Wizard;
[0114] FIG. **87** is a screen shot of an Import Wizard;
[0115] FIG. **88** is a screen shot of an Import Wizard;
[0116] FIG. **89** is a screen shot of an Import Wizard;
[0117] FIG. **90** is a screen shot of an Import Wizard;
[0118] FIG. **91** is a screen shot of an Import Wizard;
[0119] FIG. **92** is a screen shot of an Import Wizard;
[0120] FIGS. **93***a*-**93***b* are a screen shot of an Import Wizard;
[0121] FIG. **94** is a screen shot of an Import Wizard;
[0122] FIG. **95** is a screen shot of an Import Wizard;
[0123] FIG. **96** is a screen shot of an Import Wizard;
[0124] FIG. **97** is a screen shot of an Import Wizard;
[0125] FIG. **98** is a screen shot of an Import Wizard;
[0126] FIG. **99** is a screen shot of an Import Wizard;
[0127] FIG. **100** is a screen shot of an Import Wizard;
[0128] FIG. **101** is a screen shot of an Import Wizard;
[0129] FIG. **102** is a screen shot of an Import Wizard;
[0130] FIG. **103** is a screen shot of an Import Wizard;
[0131] FIG. **104** is a screen shot of an Import Wizard;
[0132] FIG. **105** is a screen shot of an Import Wizard;
[0133] FIG. **106** is a screen shot of an Import Wizard;
[0134] FIG. **107** is a screen shot of an Import Wizard;
[0135] FIG. **108** is a screen shot of a locator module;
[0136] FIG. **109** is a screen shot of a locator module;
[0137] FIG. **110** is a screen shot of a locator module;
[0138] FIG. **111** is a screen shot of a locator module;
[0139] FIG. **112** is a screen shot of a locator module;
[0140] FIG. **113** is a screen shot of a locator module;
[0141] FIG. **114** is a screen shot of a locator module;
[0142] FIG. **115** is a screen shot of a locator module;
[0143] FIG. **116** is a screen shot of a locator module;
[0144] FIG. **117** is a screen shot of a locator module;
[0145] FIG. **118** is a screen shot of a locator module;
[0146] FIG. **119** is a screen shot of a locator module;
[0147] FIG. **120** is a screen shot of a locator module;
[0148] FIG. **121** is a screen shot of a locator module;
[0149] FIG. **122** is a screen shot of an Application Wizard;
[0150] FIG. **123** is a screen shot of an Application Wizard;
[0151] FIG. **124** is a screen shot of an Application Wizard;
[0152] FIG. **125** is a screen shot of an Application Wizard;
[0153] FIG. **126** is a screen shot of an Application Wizard;
[0154] FIG. **127** is a screen shot of an Application Wizard;
[0155] FIG. **128** is a screen shot of an Application Wizard;
[0156] FIG. **129** is a screen shot of an Application Wizard;
[0157] FIG. **130** is a screen shot of an Application Wizard;
[0158] FIG. **131** is a screen shot of an Application Wizard;
[0159] FIG. **132** is a screen shot of an Application Wizard;
[0160] FIG. **133** is a screen shot of an Application Wizard;
[0161] FIG. **134** is a screen shot of an Application Wizard;
[0162] FIG. **135** is a screen shot of an Application Wizard;
[0163] FIG. **136** is a screen shot of an Application Wizard;
[0164] FIG. **137** is a screen shot of an Application Wizard;
[0165] FIG. **138** is a screen shot of an Application Wizard;
[0166] FIG. **139** is a screen shot of a CD Landing Page;
[0167] FIGS. **140***a*-**140***c* are a screen shot of a CD Landing Page;
[0168] FIG. **141** is a screen shot of a CD Landing Page;
[0169] FIG. **142** is a screen shot of a CD Landing Page;
[0170] FIG. **143** is a screen shot of a CD Landing Page;
[0171] FIG. **144** is a screen shot of a CD Landing Page;
[0172] FIG. **145** is a screen shot of a CD Landing Page;
[0173] FIG. **146** is a screen shot of a CD Landing Page;
[0174] FIG. **147** is a screen shot of a CD Landing Page;
[0175] FIG. **148** is a screen shot of a CD Landing Page;
[0176] FIG. **149** is a screen shot of a CD Landing Page;
[0177] FIG. **150** is a screen shot of a CD Landing Page;
[0178] FIG. **151** is a screen shot of a CD Landing Page;
[0179] FIGS. **152***a*-**152***b* are a screen shot of a CD Landing Page;
[0180] FIG. **153** is a screen shot of a CD Landing Page;
[0181] FIG. **154** is a screen shot of a CD Landing Page;
[0182] FIG. **155** is a screen shot of a CD Landing Page;
[0183] FIGS. **156***a*-**156***c* are a screen shot of a CD Landing Page;
[0184] FIGS. **157***a*-**157***b* are a screen shot of a CD Landing Page;
[0185] FIG. **158** is a screen shot of a CD Landing Page;
[0186] FIG. **159** is a screen shot of a CD Landing Page;
[0187] FIG. **160** is a screen shot of a CD Landing Page;

[0188] FIG. **161** is a screen shot of a CD Landing Page;
[0189] FIG. **162** is a screen shot of a CD Landing Page;
[0190] FIG. **163** is a screen shot of a CD Landing Page;
[0191] FIGS. **164***a*-**164***b* are a screen shot of a CD Landing Page;
[0192] FIG. **165** is a screen shot of a CD Landing Page;
[0193] FIGS. **166***a*-**166***b* are a screen shot of a CD Landing Page;
[0194] FIGS. **167***a*-**167***b* are a screen shot of a CD Landing Page;
[0195] FIGS. **168***a*-**168***b* are a screen shot of a CD Landing Page;
[0196] FIG. **169** is a screen shot of a CD Landing Page;
[0197] FIGS. **170***a*-**170***c* are a screen shot of a CD Landing Page;
[0198] FIGS. **171***a*-**171***c* are a screen shot of a CD Landing Page;
[0199] FIGS. **172***a*-**172***c* are a screen shot of a CD Landing Page;
[0200] FIGS. **173***a*-**173***b* are a screen shot of a CD Landing Page;
[0201] FIGS. **174***a*-**174***b* are a screen shot of a CD Landing Page;
[0202] FIG. **175** is a screen shot of a CD Landing Page;
[0203] FIGS. **176***a*-**176***b* are a screen shot of a CD Landing Page;
[0204] FIGS. **177***a*-**177***b* are a screen shot of a CD Landing Page;
[0205] FIG. **178** is a screen shot of a CD Landing Page;
[0206] FIG. **179** is a screen shot of a CD Landing Page;
[0207] FIG. **180** is a screen shot of a CD Landing Page;
[0208] FIG. **181** is a screen shot of a CD Landing Page;
[0209] FIG. **182** is a screen shot of a CD Landing Page;
[0210] FIG. **183** is a screen shot of a CD Landing Page;
[0211] FIG. **184** is a screen shot of a CD Landing Page;
[0212] FIGS. **185***a*-**185***b* are a screen shot of a CD Landing Page;
[0213] FIGS. **186***a*-**186***c* are a screen shot of a CD Landing Page;
[0214] FIG. **187** is a screen shot of a CSR Landing Page;
[0215] FIGS. **188***a*-**188***b* are a screen shot of a CSR Landing Page;
[0216] FIGS. **189***a*-**189***b* are a screen shot of a CSR Landing Page;
[0217] FIG. **190** is a screen shot of a CSR Landing Page;
[0218] FIGS. **191***a*-**191***d* are a screen shot of a VA Landing Page;
[0219] FIGS. **192***a*-**192***b* are a screen shot of Calls and Notes Pages;
[0220] FIGS. **193***a*-**193***b* are a screen shot of Calls and Notes pages;
[0221] FIGS. **194***a*-**194***c* are a screen shot of Calls and Notes pages;
[0222] FIGS. **195***a*-**195***c* are a screen shot of Calls and Notes pages;
[0223] FIG. **196** is a screen shot of Audit History pages;
[0224] FIGS. **197***a*-**197***b* are a screen shot of Audit History pages;
[0225] FIG. **198** is a screen shot of Audit History pages;
[0226] FIGS. **199***a*-**199***b* are a screen shot of a File Directory;
[0227] FIG. **200** is a screen shot of a File Directory;
[0228] FIG. **201** is a screen shot of a File Directory;
[0229] FIGS. **202***a*-**202***b* are a screen shot of the Domino Directory;
[0230] FIGS. **203***a*-**203***b* are a screen shot of the Bulletin Board IM;
[0231] FIGS. **204***a*-**204***b* are a screen shot of the Bulletin Board IM;
[0232] FIGS. **205***a*-**205***b* are a screen shot of the LA Field;
[0233] FIG. **206** is a screen shot of the LA Field;
[0234] FIGS. **207***a*-**207***b* are a screen shot of Symphony Templates and Bookmarks;
[0235] FIGS. **208***a*-**208***b* are a screen shot of Symphony Templates and Bookmarks;
[0236] FIGS. **209***a*-**209***b* are a screen shot of Symphony Templates and Bookmarks;
[0237] FIGS. **210***a*-**210***b* are a screen shot of Symphony Templates and Bookmarks;
[0238] FIGS. **211***a*-**211***c* are a screen shot of Symphony Templates and Bookmarks;
[0239] FIGS. **212***a*-**212***b* are a screen shot of Symphony Templates and Bookmarks;
[0240] FIG. **213** is a screen shot of Mail Description pages;
[0241] FIGS. **214***a*-**214***b* are a screen shot of Mail Descriptions pages;
[0242] FIGS. **215***a*-**215***c* are a screen shot of Mail Descriptions pages;
[0243] FIG. **216** is a screen shot of Mail Descriptions pages;
[0244] FIG. **217** is a screen shot of Reminder pages;
[0245] FIG. **218** is a screen shot of Reminder pages;
[0246] FIGS. **219***a*-**219***d* are a screen shot of Reminder pages;
[0247] FIGS. **220***a*-**220***b* are a screen shot of Reminder pages;
[0248] FIGS. **221***a*-**221***b* are a screen shot of Reminder pages;
[0249] FIGS. **222***a*-**222***b* are a screen shot of Reminder pages;
[0250] FIG. **223** is a screen shot of Initial Call Questionnaire pages;
[0251] FIGS. **224***a*-**224***b* are a screen shot of Initial Call Questionnaire pages;
[0252] FIGS. **225***a*-**225***b* are a screen shot of Initial Call Questionnaire pages;
[0253] FIG. **226** is a screen shot of Initial Call Questionnaire pages;
[0254] FIGS. **227***a*-**227***b* are a screen shot of Initial Call Questionnaire pages;
[0255] FIG. **228** is a screen shot of Initial Call Questionnaire pages;
[0256] FIGS. **229***a*-**229***b* are a screen shot of Initial Call Questionnaire pages;
[0257] FIGS. **230***a*-**230***c* are a screen shot of Initial Call Questionnaire pages;
[0258] FIG. **231** is a screen shot of Initial Call Questionnaire pages;
[0259] FIG. **232** is a screen shot of Initial Call Questionnaire pages;
[0260] FIGS. **233***a*-**233***b* are a screen shot of Initial Call Questionnaire pages;
[0261] FIG. **234** is a screen shot of Initial Call Questionnaire pages;
[0262] FIGS. **235***a*-**235***b* are a screen shot of Initial Call Questionnaire pages;

[0263] FIG. **236** is a screen shot of Initial Call Questionnaire pages;
[0264] FIG. **237** is a screen shot of Initial Call Questionnaire pages;
[0265] FIGS. **238***a*-**238***b* are a screen shot of Initial Call Questionnaire pages;
[0266] FIG. **239** is a screen shot of Initial Call Questionnaire pages;
[0267] FIG. **240** is a screen shot of Initial Call Questionnaire pages;
[0268] FIGS. **241***a*-**241***b* are a screen shot of Initial Call Questionnaire pages;
[0269] FIGS. **242***a*-**242***b* are a screen shot of Initial Call Questionnaire pages;
[0270] FIG. **243** is a screen shot of Initial Call Questionnaire pages;
[0271] FIG. **244** is a screen shot of Initial Call Questionnaire pages;
[0272] FIG. **245** is a screen shot of Initial Call Questionnaire pages;
[0273] FIGS. **246***a*-**246***b* are a screen shot of SSA Hearing Views pages;
[0274] FIG. **247** is a screen shot of SSA Hearing Views pages;
[0275] FIG. **248** is a screen shot of SSA Hearing Views pages;
[0276] FIG. **249** is a screen shot of SSA Hearing Views pages;
[0277] FIG. **250** is a screen shot of SSA Hearing Views pages;
[0278] FIG. **251** is a screen shot of SSA Hearing Views pages;
[0279] FIG. **252** is a screen shot of SSA Hearing Views pages;
[0280] FIG. **253** is a screen shot of SSA Hearing Views pages;
[0281] FIG. **254** is a screen shot of SSA Hearing Views pages;
[0282] FIGS. **255***a*-**255***b* are a screen shot of SSA Hearing Views pages;
[0283] FIG. **256** is a screen shot of SSA Hearing Views pages;
[0284] FIG. **257** is a screen shot of SSA Hearing Views pages;
[0285] FIG. **258** is a screen shot of SSA Hearing Views pages;
[0286] FIGS. **259***a*-**259***b* are a screen shot of SSA Hearing Views pages;
[0287] FIG. **260** is a screen shot of SSA Hearing Views pages;
[0288] FIGS. **261***a*-**261***b* are a screen shot of SSA Hearing Views pages;
[0289] FIGS. **262***a*-**262***b* are a screen shot of SSA Hearing Views pages;
[0290] FIGS. **263***a*-**263***b* are a screen shot of SSA Hearing Views pages;
[0291] FIG. **264** is a screen shot of SSA Hearing Views pages;
[0292] FIG. **265** is a screen shot of SSA Hearing Views pages;
[0293] FIG. **266** is a screen shot of SSA Hearing Views pages;
[0294] FIG. **267** is a screen shot of SSA Hearing Views pages;
[0295] FIG. **268** is a screen shot of SSA Hearing Views pages;
[0296] FIG. **269** is a screen shot of SSA Hearing Views pages;
[0297] FIGS. **270***a*-**270***b* are a screen shot of SSA Hearing Views pages;
[0298] FIGS. **271***a*-**271***b* are a screen shot of SSA Hearing Views pages;
[0299] FIGS. **272***a*-**272***c* are a screen shot of SSA Hearing Views pages;
[0300] FIGS. **273***a*-**273***c* are a screen shot of SSA Hearing Views pages;
[0301] FIG. **274** is a screen shot of SSA Hearing Views pages;
[0302] FIGS. **275***a*-**275***b* are a screen shot of SSA Hearing Views pages;
[0303] FIG. **276** is a screen shot of SSA Hearing Views pages;
[0304] FIG. **277** is a screen shot of SSA Hearing Views pages;
[0305] FIGS. **278***a*-**278***b* are a screen shot of SSA Hearing Views pages;
[0306] FIGS. **279***a*-**279***e* are a screen shot of SSA Hearing Views pages;
[0307] FIGS. **280***a*-**280***b* are a screen shot of SSA Hearing Views pages;
[0308] FIGS. **281***a*-**281***b* are a screen shot of SSA Hearing Views pages;
[0309] FIG. **282** is a screen shot of SSA Hearing Views pages;
[0310] FIGS. **283***a*-**283***c* are a description of auto-fax instructions;
[0311] FIG. **284** is a description of auto-fax instructions;
[0312] FIG. **285** is a screen shot of the client portal;
[0313] FIG. **286** is a screen shot of the client portal;
[0314] FIG. **287** is a screen shot of the client portal;
[0315] FIGS. **288***a*-**288***b* are a screen shot of the client portal;
[0316] FIG. **289** is a screen shot of the client portal;
[0317] FIG. **290** is a screen shot of the client portal;
[0318] FIG. **291** is a screen shot of the client portal;
[0319] FIGS. **292***a*-**292***b* are a screen shot of the client portal;
[0320] FIG. **293** is a screen shot of the client portal;
[0321] FIG. **294** is a screen shot of the client portal;
[0322] FIG. **295** is a screen shot of the client portal;
[0323] FIG. **296** is a screen shot of the client portal;
[0324] FIG. **297** is a screen shot of the client portal;
[0325] FIG. **298** is a screen shot of the client portal;
[0326] FIG. **299** is a screen shot of the client portal;
[0327] FIG. **300** is a screen shot of the client portal;
[0328] FIG. **301** is a screen shot of the client portal.

DETAILED DESCRIPTION OF THE INVENTION

[0329] While the present invention is susceptible of embodiment in various forms, there is shown in the drawings and will hereinafter be described a presently preferred, albeit not limiting, embodiment with the understanding that the present disclosure is to be considered an exemplification of the present invention and is not intended to limit the invention to the specific embodiments illustrated.

[0330] FIGS. **1-282**, which are now referenced, illustrate the present invention and the manner in which it is performed.

[0331] Referring to FIGS. **1**A-**1**F is shown a general method of claim progression relating to social security disability. The instant invention is portable across other areas of law and also to other industries. For example, this method of claim progression is useful for insurance benefit claims and other administrative proceedings.

[0332] The claim process administration begins at step **100**, which defines a process by which client leads are generated. The client leads are generated through traditional and modern means including television, internet and social networking advertising and marketing. The client leads are received into a software suite. The flow charts FIGS. **1**A and **1**B illustrate the path that a claim for a benefit from a government agency will take according to the present invention. In a preferred embodiment a claim for a benefit from the Social Security Administration is described. It should be noted that other claims for other benefits and services from other that the government can also be obtained utilizing the present invention.

[0333] A determination is made at step **102** if an individual needs to file a claim for a benefit. At step **104** the response triggers a work flow for the initial application for benefits. At step **106** the initial application work flow is complete and the application is produced and/or the application data is filled in/populated automatically. This procedure depends on the manner in which the system is set up and the specific software that the system is utilizing. The application is then filed with the specific government agency, in the preferred embodiment, the Social Security Administration. At step **108** a determination is made to accept or reject the benefit claim at the government agency. If the benefit claim is accepted at step **110** a letter indicating this acceptance is sent to the individual or firm who submitted the benefit claim application. At step **112** the status that the claim has been approved is indicated.

[0334] Should the claim be denied, an AOD appeal is initiated at step **118**. Additionally, a reconsideration request is initiated at step **122**. At step **126** the reconsideration of the claim denial is filed. Next, the process goes to step **138** where it is joined with another type of claim denial appeal prior to filing for a hearing at step **142**.

[0335] If there is a letter from the government administration, such as the Social Security Administration, denying the benefits from the initial filing of the application for benefits, then a letter is mailed at step **114**. This letter can trigger specific work flows relating to the denial at step **116**. Alternatively, there is a procedure relating to the denial that occurs at step **120**. Subsequent to steps **120** and **116** the work flow is complete at step **124**. If the individual and/or law firm decides to go back to the agency for reconsideration of the agency's denial of benefits, the process then proceeds to step **128**. Here the reconsideration process and work flow related to the reconsideration process begins.

[0336] Next, there will be a letter from the Social Security Administration approving the reconsideration request **130** or denying the reconsideration request **134**. When the reconsideration request is approved the process moves to **132** where the reconsideration takes place. If the reconsideration is denied, an AOD appeal is next at **138**. The hearing for the AOD appeal takes place at **142**.

[0337] After receiving the reconsideration request denial letter from the Social Security Administration a specific work flow is triggered at **136** regarding the denial. Alternatively, the denial proceeds to step **140** then onto step **144** where the work flow is complete. Also, from **136** the process proceeds to step **144**. Next, a hearing is filed at **146**. There can be three results of the filing. First, the hearing is fully favorable to the individual/law firm and a letter is sent to the individual/law firm from the Social Security Administration (SSA). The process ends with a fully favorable reconsideration of the benefit request at **152**. Second, a letter is send from the SSA approving an OTR at **148**. The process ends here with a fully favorable reconsideration of the benefit request at **154**. Finally, a letter form the SSA is mailed with an RTS notice at **158**.

[0338] The following steps are found in FIG. **1**B. Next, a letter from the SSA is mailed regarding the hearing notice at **160**. From here either there is a scheduled hearing at **162** or a scheduled hearing at **170**. From both **162** and **170** there is a post hearing at **174**. The next step is awaiting a decision at **176**. There can be three results from the decision. First, a letter from the SSA is mailed which is fully favorable at **178**. Then at step **180** the fully favorable decision is recorded. Next, at **172**, there is a letter from the SSA indicating a remand where the A/C overturns the FF. From here there is a fully favorable decision at **168** and a letter from the SSA is mailed at **166**. The process then proceeds to **164** where there is a RTS, the A/C overturns the FF. The process then proceeds back to step **160**. Second, there is a letter from the SSA indicating a partially favorable decision from the hearing at **186**. This letter triggers certain work flow at **188** and then proceeds to **196** where the work flow regarding a partially favorable decision is complete. From step **186** there is a partially favorable hearing at **192**. Then the process proceeds to step **196**. Finally, there is a letter from the SSA indicating that the decision is unfavorable at **184**. This letter triggers specific work flow at **182** and this workflow proceeds to an assessment of the unfavorable decision at **194**. From **184** the process can proceed to **190** where assessment of the unfavorable decision starts.

[0339] From step **194** there can be three results. First, at **198** a new application is filed. Second, at **202** a decision is made to not pursue any further action at **202**. Finally, at **200** a decision is made to appeal the unfavorable decision. The next step is the appeals council at **214**. From step **196** there can be two results. First, there is no appeal of the partially favorable decision at **206**. Second, a decision is made to appeal the partially favorable decision at **204**. After the decision at **204** the process proceeds to the appeal council at **214**.

[0340] From the decision of appeal council the process can proceed in one of **4** different ways. First, at **208** there is a letter from the SSA that the appeal was successful at **208** and the process concludes at **220**. Second, there is a letter from the SSA remanding the appeal at **210**. The process proceeds to step **222** and then to step **230** where a letter from the SSA contains a RTS notice. Next, at step **234** there is a letter from the SSA containing the hearing notice. Then the hearing is scheduled at **236** and the process returns to step **170**. Third, there is a letter from the SSA dismissing the appeal at **218**. This letter triggers work flow at **212** which concludes at **244** where the dismissal can proceed in one of two ways. After step **218** the process can proceed to step **224** where the A/C is dismissed. Fourth, there is a letter from the SSA denying the appeal at **220**. As a result of this letter, the process can proceed to either of steps **216** or **228**.

[0341] At step **216** there are triggers for work flow to come to a final decision that there will be no further appeal. At step **228** there are triggers for work flow to come to a decision that there will be a further appeal. At step **246** there is assessment to see if the work flow is complete. From step **246** there can be a denial decision at **248** at the Federal level. There can also be a denial decision at step **250**. From step **248** the process proceeds to step **252** which is the Federal level. From here there are two outcomes. First, there is a letter from the SSA denying the appeal at step **254**. Second, there is a letter from the SSA granting the benefit and this decision is published as a final order at **256**.

[0342] There can also be a remand of the decision at the Federal level at step **262**. From here the process proceeds to step **238** where a letter from the SSA indicates a RTS notice. Next, there is a RTS (Federal Remand) step **240**. Then, at step **242** there is a letter from the SSA containing a notice of the hearing. The hearing is scheduled at step **260** and the process proceeds back to step **170**.

[0343] Referring to FIG. **1**C, a simplified flow chart is provided depicting the computer driven systematic method of populating social security claim forms comprising the steps of:

[0344] providing a series of on-line contact information questions to a claimant **280** where the claimant enters contact information. The answers provide by the claimant are compared against a database **282** to determine a service track for the claimant by determining which government benefit programs the claimant is eligible for. The method determines if the claimant has a valid claim for Social Security Disability Insurance (SSDI) **284**, Supplemental Security Income (SSI) **286**, or veterans disability **288** based upon questions selected from said service track. The claimant is then directed through appropriate through appropriate questions and sequences based on answers and valid claim **290** and provides the appropriate questions to determine medical qualifies **292**, financial qualifiers **294** and claim status qualifiers **296**. A determination is then made if the claimant can be evaluated for a Disability claim **298** wherein the claimant is directed to a processing stage **300** and an inquiry is made to determine if the intake review is complete **302**. If the intake review is incomplete the intake is denied **304**, if the intake review is complete the intake is accepted **306** based on the claimant's medical history and determining that the claimant has a valid claim for benefits. The documents are generated for a mobile representative or mailed upon assigning **308** a Social Security District Office by zip code. Representation forms are populated for the claimant to sign **310** and the forms are submitted to the assigned Social Security District Office when appropriate **312**. If the claim status fails, the claim does not need to be filed. A further review of the intake review is performed and status still indicates fail, the intake is denied. If the further review of the intake review is performed and status indicates accepted **306'**, the claimant is passed to document preparation **308'**.

[0345] FIGS. **2-284** are screen shots of the above noted process. The screen shot indicate different possible selections and decisions at various steps in the above noted process.

[0346] The Import Wizard allows users to attach documents directly to client's files. Wizard is a trademark of the applicant. The wizard connects to a network folder called a Source folder where scanned documents are stored in PDF format. The user can see the selected document in a preview window within the Wizard to easily identify the document and the specific client. The user can select from **6** different import options depending on the type of documents they are importing.

[0347] Incoming Mail

[0348] Outgoing Mail

[0349] Collections

[0350] Medical Records

[0351] Pickups

[0352] Work-flow Documents

[0353] When a specific client is searched and found their contact and claim information will appear in right side panel. The user will have the option to import the current document in the preview window, skip the current document in the preview window, or pick from a list of all documents in the network folder.

[0354] Once the document is imported it is automatically moved into a Target folder.

[0355] Importing Pickups: The Pickups Import Wizard is used to import the initial representation paperwork signed by a client.

[0356] The user will click Import to attach the document to the specific clients file.

[0357] After clicking Import a dialog will appear showing the three different categories the signed paperwork will go into: Pickup Package, 1696 & FA, and L&N Release.

[0358] After one the categories is imported it is indicated on the right panel under "Imported Subjects". To complete a pickup all three categories need to be imported.

[0359] Incoming Mail: This section of the import wizard is used to import incoming mail documents relating to the clients claim. The user will select from a list of predetermined letter titles depending on what they are importing. The user can assign each imported document to another user if needed.

[0360] The user will click Import to attach the document to the specific clients file.

[0361] After clicking import an Import Window dialog will appear. The user will be able to update multiple data fields relating to the document they are importing. The data fields that are updated in the import window will be updated on the clients claim page.

[0362] Outgoing Mail: This section of the import wizard is used to upload outgoing mail documents.

[0363] The user will click Import to attach the document to the specific clients file.

[0364] The user will select from a list of pre-determined letter titles depending on what they are importing.

[0365] Workflow documents: Several workflows have been created to require a document to be attached to EZ claim as part of the workflow.

[0366] The user will click Import to attach the document to the specific clients file.

[0367] Claims have multiple workflows pending at any given time so a dialog will appear to ensure the user is importing the document to complete the correct one.

[0368] The workflow must be on the "Import" step (most workflows have multiple steps, Import being the last).

[0369] The workflow will appear in yellow in the right side panel which indicates it is on the Import step (it will be white if it's on any other step of the workflow).

[0370] Medical Records: This section of the Import Wizard is used to import Medical Records relating to the clients claim.

[0371] In addition to the clients contact and claim information, their treating sources will also appear in the right panel.

[0372] An "Add doctor/facility" button will also appear on the right panel which will allow the user to add a new doctor or facility if needed.

[0373] The user will click Import to attach the document to the specific clients file.

[0374] A dialog will appear giving the options Client, Facility, or ODAR. The user will select one of these options depending on where the record was received from.

[0375] If the user selects the Client option they must then determine whether the document they are importing is a "Medical Record" from a Doctor/Facility or if it would be categorized as "Other" which is anything that does not fall into the Medical Record category.

[0376] If the user selects Medical Record they will then need to select whether the Record was "Requested" or "Unrequested".

[0377] The "Requested" option means our office has already requested the records being imported and allows the user to match the received records to the records requested.

[0378] The "Unrequested" option means our office has not requested the records and the user must assign such records to a Doctor/Facility.

[0379] If the Unrequested option is selected the user will select the doctor or facility of the medical records received by the client.

[0380] Once the doctor/facility is selected the doctor/facility contact information appears in the Import window.

[0381] The user must then select from a pre-determined list the type of record that has been received.

[0382] The user must also select from a pre-determined list the way the records were received into the office.

[0383] There is a Comments box available for the user to write additional notes to describe the record that was received.

[0384] The user can assign the additional notes to another user with the record attached in PDF format.

[0385] The user can select "Reminders" within the import window. By selecting the Reminders tab a view will appear with pending Reminders found within the clients claim. The user can place a check mark on existing Reminders to remove them.

[0386] The user can add new Reminders by clicking Add. This will bring up a dialog box that will allow the user to add a new Reminder.

[0387] If the user selects the option "Other" they will need to determine whether or not the record was Requested or Unrequested.

[0388] If the user selects Unrequested they will choose the type of record from a pre-determined list.

[0389] If the user selects "Facility" as the source where the Medical Record was received from they will then select "Medical Record" or "Invoice" as the type of record to attach.

[0390] If the user selects "Medical Record", the user will select whether the record was Requested or Unrequested.

[0391] If the user selects requested, the will also need to select the Facility from which the records were received. Once the facility is selected it will show the date range of the requested records.

[0392] The user will have the option to select Close in order to document when records are not received or when the request needs to be consolidated.

[0393] The user will select the option which best describes the reason no records were received: Need to Request, Not seen since, Not relevant. If needed the user can write in the comments area any further details regarding the reason for closing the request.

[0394] When the user clicks Save with one of the options described it will close the request.

[0395] To Consolidate a record the user must select which record needs to be consolidated.

[0396] The user must then select the Consolidate option and a Resulting Record box will appear.

[0397] The Resulting record box shows a list of open requests for facilities which the selected request can be consolidated into.

[0398] Once the user has selected which facility the records need to be consolidated and imported under, a Receive Information box appears for the user to select then to enter the record information to be imported.

[0399] If the user selects "Invoice" they will choose the Doctor/Facility from which the Invoice was received.

[0400] An Invoice can only be imported if there is an open or satisfied request in the system. Otherwise there will be no Doctors/Facilities to choose from and the system will not allow anything to be imported.

[0401] The user must select to either import as an invoice or pre-bill. Once it is imported the bill goes onto the SSA Hearing—Medical Record—Invoices—To Pay list. If the pre-bill option is selected the bill goes to the top of the "To Pay" list to be paid first regardless if other invoices were received before it.

[0402] The user must select whether the bill can be paid by check, online, or by phone. Depending upon the option selected is where the bill will appear on the "To Pay" list. If online or phone is selected the Check Name and Check Address will appear.

[0403] If an Invoice/Pre-Bill was not invoiced correctly the user can select to Dispute it. Once Dispute is selected a new dialog box will appear to place the amount we are being incorrectly charged.

[0404] The user must select the action needed on the Invoice/Pre-Bill. Based upon the option selected the bill will go to the appropriate section on the "To Pay" list. If CD approval is selected a new dialog box will appear "Assigned" to assign the bill to a person to determine whether it will be paid or cancelled.

[0405] If the user selects "ODAR" as the source where the record was received from they will then need to select "Requested" or "Unrequested".

[0406] If the user selects Unrequested they will choose the type of record from a pre-determined list.

[0407] Importing Collections: This section of the Import Wizard is used to import any payment mail relating to a clients claim.

[0408] The user will click Import to attach the document to the specific clients file.

[0409] A dialog will appear giving the options New Fee Request, New Fee Mail, Existing Fee Request, and Existing

Fee Mail. The user will select one of these options depending on what they are importing.

[0410] If the user selects "New Fee Request" they will select Received or Requested. If the user selects Received the date will automatically populate in the Check Received field.

[0411] The user will also select the Type to categorize the type of payment received, and Issued By to specify who issued the payment.

[0412] The user will then select the Fee Type from a pre-determined list.

[0413] The user will select the Attorney's name that appears on the check from a pre-determined list, the amount received, and a note if needed.

[0414] The user will select the AR Status from a pre-determined list and enter the date. This information will be reflected on the clients claim for tracking purposes.

[0415] The user will also have the option to update the clients claim status if necessary.

[0416] As described in #58, if the user selects New Fee Mail they will select the Subject and Fee Type from pre-determined lists.

[0417] The user will enter the Fee Amounts into each field accordingly and can add notes if needed.

[0418] If the user selects Existing Fee Request they will choose from a list of all Fee Requests imported under "New Fee Request" in order to edit the information.

[0419] If the user selects Existing Fee Mail they will choose from a list of all Fee Mail imported under "New Fee Mail" in order to edit the information.

[0420] The Application Wizard is an extension of the Intake Wizard. Once the Intake Wizard is completed the user is redirected to the Application Wizard for completion.

[0421] The user will be automatically redirected based on the clients claim status. The Intake Wizard predicts whether or not an Application needs to be completed based on a series of questions that are asked.

[0422] If the Intake Wizard predicts the client needs to file an application the user will redirected to the Application Wizard to begin.

[0423] All of the information gathered on the Intake Wizard is automatically populated into the Application Wizard to avoid retrieving duplicate information.

[0424] As each question is answered it allows more questions to appear. If a question does not apply due to previous answers the question will stay hidden.

[0425] If the user clicks Add Spouse a dialog will open and they will enter the all of the appropriate information which, upon saving, will populate in a summary box.

[0426] By clicking on any of the buttons on the Application Wizard a dialog will appear so that the user can enter the corresponding information. The information is then displayed in a summary box.

[0427] Once the Application Wizard is completed the client will appear on the Application Wizard View. On this view each application is categorized by the status of the Application Wizard and then sub-categorized by the user assigned to the application.

[0428] By double clicking on the client from the Application Wizard view that specific clients completed Application Wizard will open to be reviewed.

[0429] The Reviewer can add any revisions for the user to make once the Application Wizard is returned to them.

[0430] After reviewing the Application Wizard the user will click Return to Submitter and then from a dialog box they will select Revise and Return, Revise and OK to Submit, or OK to Submit.

[0431] Once the Application Wizard is under the category OK to Submit the user will click the Submit to SSA button.

[0432] The Social Security Application for Disability Benefits is a series of three (3) extensive forms. The Application Wizard has grouped the questions from these forms together to drastically shorten the completion time and to avoid gathering duplicate information.

[0433] Once all of the information is gathered using the Application Wizard the user can generate all three (3) Social Security forms by clicking the Submit to SSA button. Each application will open one at a time and the information gathered on the Application Wizard is populated into the corresponding fields on the SSA Application forms.

[0434] Now referring to FIGS. **285-301**, disclosed is MyClaimGo, a client portal, the client will go to www.myclaim.com. They can also access the portal from our website, www.disabilitylawclaims.com by clicking on the MyClaim link. MyClaim and MyClaimGo are trademarks of the Applicant. To Register the client will click on Register to use the site.

[0435] The client will enter their personal information and create a username and password.

[0436] Once the client registers, their information will be linked directly to their claim in Lotus using their Last Name, Date of Birth, and the Last four digits of their Social Security Number.

[0437] Once the client registers and logs in they will have access to their claim status information, contact information, emergency contact information, medical treatment information, prescription information, medical conditions, and work history.

[0438] If the client clicks on Emergency Contacts they will be able to view, Edit, or Remove all existing contacts. They will also have the ability to add New contacts.

[0439] If the client requests to add, edit, or remove a contact the request will appear in their Pending Requests window.

[0440] All client requests to add, edit, or remove information is sent our Admin Console which a user is checking daily.

[0441] If the client clicks on Medical Treatment they will be able to view, Edit, or Remove all existing Medical Treating sources. They will also have the ability to add new Treating Sources.

[0442] If the client requests to add, edit, or remove a medical treating source the request will appear in their Pending Requests window.

[0443] If the client clicks on Prescriptions they will be able to view, Edit, or Remove all existing Prescriptions. They will also have the ability to add new Prescriptions.

[0444] If the client requests to add, edit, or remove a prescription the request will appear in their Pending Requests window.

[0445] As described in #5<---this doesn't make sense here because my numbers are not included, if the client clicks on Medical Conditions they will be able to view, Edit, or Remove all existing Medical Conditions. They will also have the ability to add new Conditions.

[0446] If the client requests to add, edit, or remove a medical condition the request will appear in their Pending Requests window.

[0447] If the client clicks on Work History they will be able to view, Edit, or Remove all existing Work History. They will also have the ability to add new Work History.

[0448] If the client requests to add, edit, or remove a Work History the request will appear in their Pending Requests window.

[0449] The client can also click on Additional Comments to enter any information or request they'd like to be reviewed by the firm.

[0450] All client requests submitted to the Admin Console are reviewed daily and will be updated in the clients claim that will reflect on MyClaimGo.com in real time.

[0451] All patents and publications mentioned in this specification are indicative of the levels of those skilled in the art to which the invention pertains. All patents and publications are herein incorporated by reference to the same extent as if each individual publication was specifically and individually indicated to be incorporated by reference.

[0452] It is to be understood that while a certain form of the invention is illustrated, it is not to be limited to the specific form or arrangement herein described and shown. It will be apparent to those skilled in the art that various changes may be made without departing from the scope of the invention and the invention is not to be considered limited to what is shown and described in the specification and any drawings/figures included herein.

[0453] One skilled in the art will readily appreciate that the present invention is well adapted to carry out the objectives and obtain the ends and advantages mentioned, as well as those inherent therein. The embodiments, methods, procedures and techniques described herein are presently representative of the preferred embodiments, are intended to be exemplary and are not intended as limitations on the scope. Changes therein and other uses will occur to those skilled in the art which are encompassed within the spirit of the invention and are defined by the scope of the appended claims. Although the invention has been described in connection with specific preferred embodiments, it should be understood that the invention as claimed should not be unduly limited to such specific embodiments. Indeed, various modifications of the described modes for carrying out the invention which are obvious to those skilled in the art are intended to be within the scope of the following claims.

What is claimed is:

1. A computer driven systematic method for filtering data regarding Social Security disability, Veteran's Disability Compensation, or Workers Compensation claims, the method comprising the steps of:

providing on-line accessible data fields via a questionnaire whereby data is entered on a computer device coupled to the Internet;

providing a database that stores pre-configured rules in order to compare the data received via the questionnaire against such rules;

receiving data that is entered into the questionnaire, by a computer device coupled to the internet, said computer device having a processor configured to execute a computer application to compare the data that is entered in the questionnaire against rules that are stored in said database;

analyzing the data that has been entered into the questionnaire to determine how to filter the data regarding Social Security disability, Veteran's Disability Compensation, or Workers Compensation claims;

comparing answers received against a shared database with pre-configured data, by the computer device to determine how to proceed with the data received on the questionnaire; and

filtering at least a portion of the answers into a database within the computer based on rules programmed in the computer application or defined in the shared database.

2. The systematic method of claim **1** including the step of determining whether a specialized representative or law firm should assist a claimant in applying for benefits by to receive Social Security disability benefits, Veteran's Disability Compensation benefits, or Workers Compensation claims benefits.

3. The systematic method of claim **1** wherein said questionnaire includes assessing medical, financial, educational, work, and personal history to a processing stage to verify medical, financial and claim status qualifiers.

4. The systematic method of claim **1** including the step of machine learning through identification of filtered information data for automatically updating said database in real time, subject to user confirmation, with adjusted filtered conditions.

5. The systematic method of claim **1** including the step of populating representation forms based on the type of case, pending claim status, claim progression, client location, work flow, medical conditions, prescriptions, age, date last insured, onset date, work history, military occupational specialty and financial information.

6. The systematic method of claim **1** wherein said questionnaire includes the service track for a veteran, the veteran's military service, military occupational specialty, and medals.

7. The systematic method of claim **6** wherein the gathering of information to determine eligibility for Veterans Disability includes the military branch in which the claimant served, dates of service, the position held while in service, whether or not the claimant was discharged honorably, medals received, military pension, and determining whether the claimant needs to file an application or appeal.

8. The systematic method of claim **1** including the step of determining, by the application executing on the processor of the computer device, whether the claimant's children appear to be eligible for receiving benefits.

9. The systematic method of claim **1** including the step of predicting, by the application executing on the processor of the computer device, whether an application or appeal for the claimant is required, or whether the claimant has ever filed an application.

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