Once for Wales Concerns Management System

Datix Cymru

CLAIMS MODULE

An adapted module for Claims Handlers within NHS Wales Health Bodies

Incorporating: Clinical Negligence Claims
Personal Injury Claims
Inquest Case Management

Functionality User Guide

V3.1 *Released 1st October 2021*
Expires 31st December 2021

The screenshots and examples used in this guide are drawn from test records within the All-Wales Demonstration system and do not include identifiable information.

Contents

Introduction

This document provides you with a guide on how to use the Claims functionality.

The Claims functionality helps you to deal effectively and efficiently with your legal caseload and to manage all aspects of legal claims and inquests including costs, timescales and Welsh Risk Pool information.

Claim records allow you to capture all details relating to the claim or inquest, as well as any actions and action plans that have been assigned.

You can review a full notification and message history for the record, information relating to claim, and also save attachments or reports with additional information. This information is used for reporting and analysis purposes, so it is vital that the data entered is accurate and useful.

Before you add a new claims record to the system you must do a full search using the contacts module to establish if the claimant/person affected is already a contact in the system. If an incident or complaint record is found which relates to the claim, you will need to click on the 'generate from' key to create a new record, this will also link the records together. More information on how to 'generate from' can be found under 'how to add a new claim record'.

Aspects of the Form

This icon indicates that a field is mandatory, and you are required to complete it before saving or submitting the form.

This icon indicates that the field you are completing is a dropdown list. Clicking this icon will allow you to select the appropriate option(s).

This icon indicates a date field. Clicking the icon will allow you to select a date from a calendar, or you can simply type the date in using the dd/mm/yyyy format.

Any field that shows this icon next to it indicates that there is additional information available to help you complete it correctly. Click the icon to view the additional guidance.

In a multi-select field, where you can choose more than one option from a dropdown, clicking this icon will remove the currently selected value(s).

Save button

How to access the system

You can record a claim record by clicking on the URL link.

If you are sent an email notifying you of the claim, the email will contain the URL link that will take you directly to the claim record once you login.

If you are an authorized user and need to login to the system you can do this by using your Active Directory account. This is the same login name and password you use to login to your PC.

If you encounter any issues, then please contact your Local System Lead.

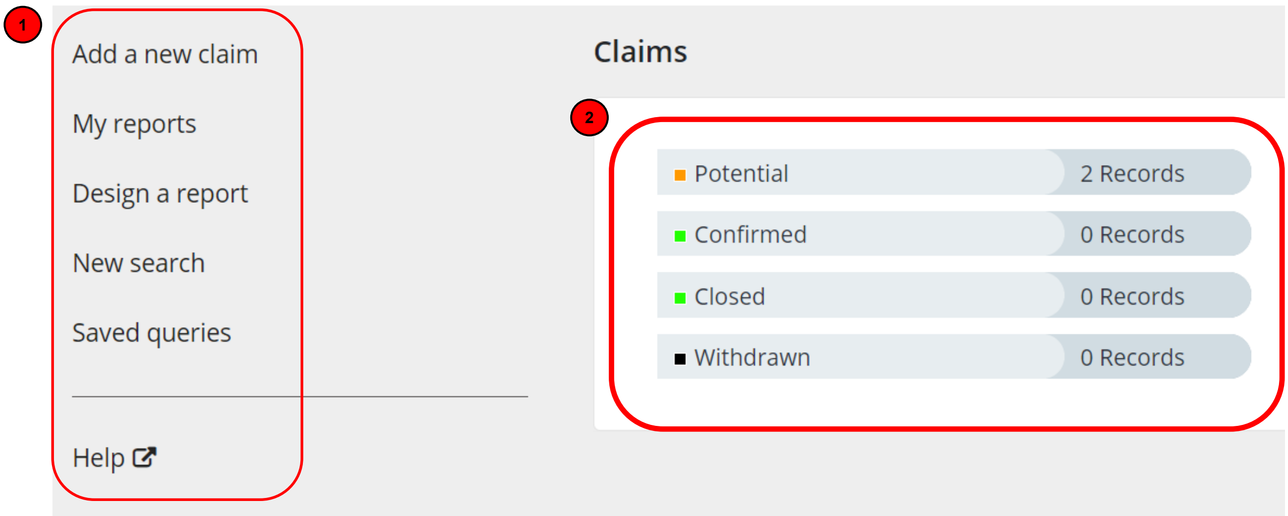
Landing Page

When you login to the Claims functionality you will be presented with the landing page below:

1. The left-hand navigation panel contains all the tools necessary to add or manage a new record and produce statistical and listing reports.

2. The status area records where the case record sits within the workflow.

3. ‘Pinned’ queries (not displayed) allows instant access to a maximum of ten most frequently used searches.



The below table provides the information that is displayed on the landing page:

	Field name	Explanation
Left -hand navigation panel	Add a new claim	Click on this to add a new claim form
	My reports	Click on this to run saved custom reports
	Design a report	Click on this to create a custom report
	New Search	Click on this to search for specific records
	Saved queries	Click on this to access saved queries
Statuses	Potential	This is a holding area. All new claim records automatically move into the holding area until they are withdrawn or confirmed
	Confirmed	Once the claim is confirmed, it moves into the 'confirmed' holding area whilst the case is being investigated
	Closed	Once claims / inquests have been processed and completed they can be moved into the Closed area
	Withdrawn	Cases found not to be valid, cannot be actioned or withdrawn can be moved into the Withdrawn area
Pinned Queries	Pinned Queries	Pinned queries allow instant access to the most frequently used searches. If you click on any of the pinned queries it will open the records within the query

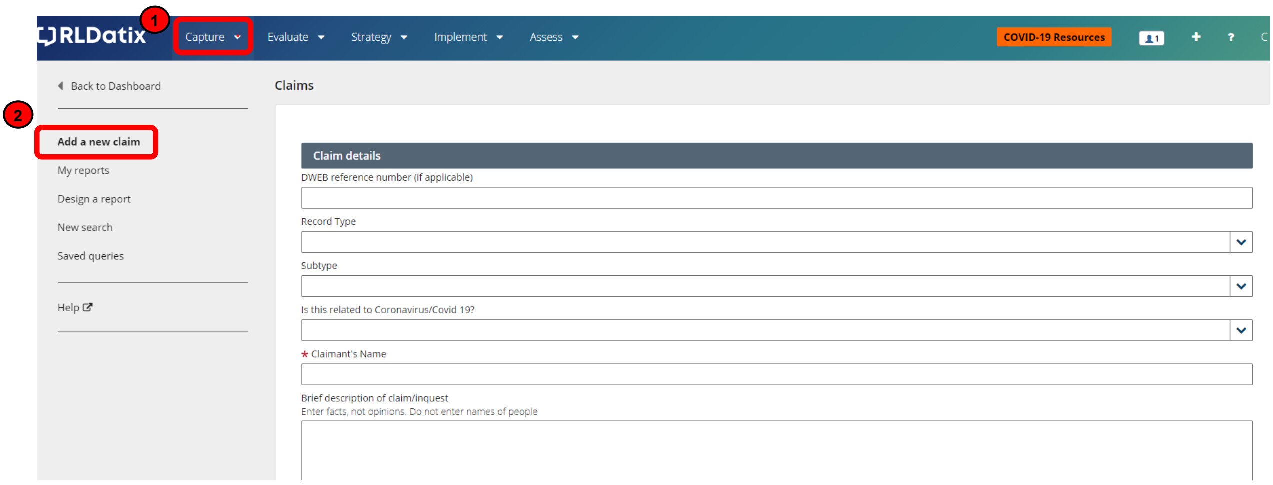
If you Click on any of the status areas, it will take you to a listing page.

The records displayed can be sorted by clicking on any column heading. Select the record you wish to view by clicking on any of the numbers/words.

How to add a new claim record

To add a new case record

1. Click Capture > Claims in the top application menu.
2. Click Add new claim in the left-hand navigation menu.



Enter the information for the record ensuring all mandatory fields are completed.

The fields that you are required to complete to add a new record are described in the table below, this includes the section names, field names, descriptors and what type of feedback will display what fields within the reporting form:

Reporting Form			
Section Header	**Field name**	**Description**	**Type of case record**
Case details	DWEB reference number	Reference number relating to corresponding record in DatixWeb (if applicable). This should only be used if the record has been transferred from DatixWeb	All records
	Record Type	This is the type of legal case being recorded: • Court of Protection • Clinical Negligence • General Enquiry • HRA Claim • Judicial Review • Inquest • Personal Injury • Property Damage	All records
	Subtype	Additional information relating to the case	All records
	Is this related to Coronavirus/ Covid 19?	If the case is related to Covid 19 then please select yes, this will enable you to identify any feedback related to Covid19	All records
	Claimant's Name	Claimants name is entered here with additional details being captured in 'persons involved'	All records
	Brief Description of claim/inquest	Enter details of the case ensuring no identifiable information e.g. names, specific locations, are entered in this field.	All records
	Is this case linked to an incident or complaint?	If 'yes' please ensure relevant records are linked (see linked records)	All records
	Incident date / Concern received date	This is the date recorded for the incident related to the case or the date a concern was first received by the organization (format = dd/mm/yyyy)	All records
	Is this case linked to a Serious Incident reported to the Delivery Unit?	You will need to select 'yes' if the case is linked to a serious incident	All records

	SI ref	You will need to add the reference number of the Serious Incident in this field	If 'yes' selected to above
Legal and Risk Services	Has Legal & Risk been instructed?	If 'yes' is selected, further fields relating to L&R instruction are triggered:	All records
	Date L&R instructed	Date L&R were instructed (format = dd/mm/yyyy)	If 'yes' selected to above
	Legal & Risk Reference	Reference number provided by Legal & Risk	If 'yes' selected to above
Locations	Location	You will need to record the primary location relating to case	All records
Services	Service	You will need to record the primary service relating to case	All records
Inquest details	Inquest opened date	Date inquest opened	Inquest only
	Coroner's Court	Select Coroner's Court from drop down list	Inquest only
	Coroner's Officer	Free type name of Coroner's Officer	Inquest only
	Can the Investigation Report / Concern Response be disclosed to HM Coroner?	Select Yes / No	Inquest only
	Date statements requested	Date statements requested by Coroner's Officer (format = dd/mm/yyyy)	Inquest only
	Date statements due for inquest?	Date statements due for Inquest (format = dd/mm/yyyy)	Inquest only
	Date of Publication	Date of Publication (format = dd/mm/yyyy)	Inquest only
	Inquest hearing date	Date given for inquest hearing (format = dd/mm/yyyy)	Inquest only
	INQ_Reason for RAG Grading	Brief outline of reason for RAG Grading	Inquest only
	Any Article 2 issues?	If 'yes' selected, further questions triggered:	Inquest only
	Is this a Jury Inquest?	Select yes or no	Inquest only
	Key Article 2 issues?	Free type text box to capture key issues raised	Inquest only
	Is there a Claim linked to this inquest	Select yes or no	Inquest only
	Have witnesses been called	If 'yes' selected, further questions triggered:	Inquest only

	Witness summons received date	Entered at Witness summons received (format = dd/mm/yyyy)	Inquest only
	Outcome of Inquest	Select outcome from drop down box. If 'Narrative' selected, further questions are triggered:	Inquest only
	Additional information regarding Narrative from HMC	Free type text box to enter information regarding narrative from HMC	Inquest only
	Was a Regulation 28 Report issues?	If 'yes' selected, further questions triggered:	Inquest only
	Brief overview of Regulation 28 Report	Free type text box to enter information regarding Reg 28 Report	Inquest only
	Date Regulation 28 Report received	Enter date Reg 28 Report received (format = dd/mm/yyyy)	Inquest only
	Reg 28 response due by	Enter date Reg 28 Response due (format = dd/mm/yyyy)	Inquest only
	Reg 28 response sent to HMC	Enter date Reg 28 Response sent (format = dd/mm/yyyy)	Inquest only
	'Record of Inquest' received	Enter date 'Record of Inquest' was received (format = dd/mm/yyyy)	Inquest only
Claim Details	Letter of Claim date	Date on Letter of Claim (format = dd/mm/yyyy)	Claim only
	Case received date	Date case received (format = dd/mm/yyyy)	Claim only
	Probability	Initial probability of claim	Claim only
	Losses and Special Payments Reference (LASPAR)	LASPAR reference number	Claim only
	Limitation Date	Time limit for case (format = dd/mm/yyyy)	Claim only
	Est settlement	Estimated Year of settlement (format = dd/mm/yyyy)	Claim only
Details of Claimant - Type	Contact Type	Identifies if the claimant is a patient, relative, Coroner's office etc. If the contact type is 'patient' a search using the patients NHS Number should be undertaken. If the person submitting the claim is not a patient, contact information will be required under 'Claimant'	All records
	Is patient claimant?	Yes/No field	All records
	Sub Type	Service user to be selected	All records
	Claimant	Enter forename and surname of claimant and search for existing contact information. If no record exists, enter contact details manually: Email:	All records

		Address Line 1 Address Line 2 Address Line 3 Postcode Primary Contact number Secondary Contact number	
	Was the person injured in the incident?	If tick box is selected, information regarding injury is requested:	All records
Injury details	Injury	Select injury from Drop down box	
	Body part	Select area of body where injury occurred	
	Treatment	Select treatment of injury	
	Is the Claimant a litigant in person	If 'no' selected, further information regarding person affected by the claim is triggered	
	Is the Claimant also the person affected?	If 'no' selected, further information regarding person affected by the claim is triggered	
Details of person affected by the claim - Type	Contact Role	Auto populated with person affected	
	Contact Type	Identifies if the claimant is a patient, relative, Coroner's office etc. If the contact type is 'patient' a search using the patients NHS Number should be used. If the person submitting the claim is not a patient, contact information will be required under ''Person'	
	Person	Enter forename and surname of claimant and search for existing contact information. If no record exists, enter contact details manually: Email: Address Line 1 Address Line 2 Address Line 3 Postcode Primary Contact number Secondary Contact number	
	Was the person injured in the incident?	If 'yes' is selected, information regarding injury is requested:	
	Injury	Select injury from Drop down box	
	Body part	Select area of body where injury occurred	
	Treatment	Select treatment of injury	
Details of Legal Representative	Reference	Reference number provided	
	Role		
	Name of organization	Enter name of organisation representing the	

	representing the Claimant	Claimant and ‘search’. If matching organization does not exist, enter contact details manually: Address Postcode Main Office number Main Office email	
Details of Legal Representative Contact Information	Representative's Record Reference	Reference number provided	
	Representative's Handler Name	Enter handler’s details	
	Representative's Handler Contact Phone Number	Enter handler’s contact number	
	Representative's Handler Contact Email	Enter handler’s email	
	Are there any other contacts involved in the claim?	If ‘yes’ is selected, a ‘contact’ section is triggered	All records
	Do you want to attach documents to this record?	If ‘yes’ is selected, the Documents Section is triggered allowing the user to add documents to the record	All records
	Secondary Telephone number	Enter secondary telephone number	
Details of person reporting the feedback	Reporter	If you are logged in your details will automatically populate.	

Note: For any sections which have a ‘search’ function, you can clear the information that may be automatically populated by clicking ‘Clear section’, within the section.

Claim records can also be generated from other records. You will need to be logged in to generate a record. By generating a claim record from another module, you can automatically populate the claim record with basic information, this will also link the records together.

To generate a record (left hand side panel)

1. Click Capture in the top application menu.
2. Select the module you want to generate a record from.
3. Find and select the appropriate record.
4. Click Generate from in the left-hand navigation menu.
5. Select Claims in the Module to generate record in drop-down field.
6. Select the desired workflow status in the Approval status drop-down field.
7. Select the appropriate checkboxes as needed:
    - Copy links to contacts?
    - Copy documents?
    - Copy casual factors?
    - Copy respondents?
    - Link generated record to master record?
8. Click Generate. The new feedback record is generated and linked to the existing record.

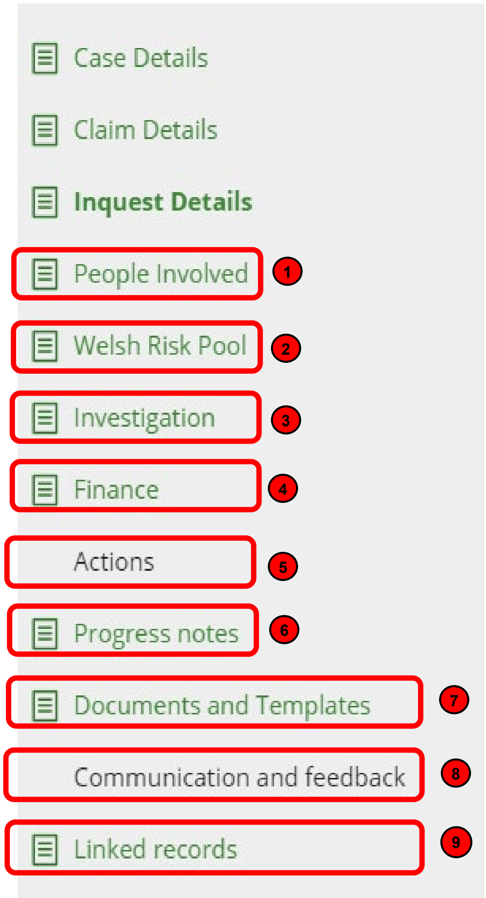
Managing a case record

When the details of the claim record have been entered into the system it is the case handler's responsibility to check that the case details have been completed accurately.

The case handler is also required to ensure that the Claim Details or Inquest Details sections (left hand panel) have been correctly completed.

To add a Stage to a Claim Record, in the claim record select the required stage from the drop down list under 'Current Stage' and click save. This will amend the current stage and update the Stage History. A list of Stages is shown in Appendix One.

Additional sections in the left hand side panel



People Involved

It is important that anyone that is involved in the Case is linked as a contact. To add any other contacts to a record, click as appropriate one of the following links:

- Create a new Claimant Link
- For other people affected, click on Create a new Person link
- For Legal Representative, click on Create a new 'organisation' or 'Organisation respondent link
- Create a new Employee link
- Create a new Other contact link for all witness' who receive a summons and include the information regarding the summons in their record.

Complete all mandatory fields and click Check for Matching Contacts to ensure that the contact does not already exist. If a record exists, click Choose and complete any incident specific information as appropriate.

If a record does not exist, click Cancel and complete the Contact Details and any Link Details and Employee Details as appropriate. Click Create New Link > Save.

Contact Matching

The system not only integrates with the Master Patient Index but also contains a large contact database in the background which provides you with incredibly useful information. This will enable you to search on how many times an individual has been involved in an incident, complaint etc. If you need to manually enter a contact then the person responsible for managing the record will need to perform an "approval" process on each contact submitted to ensure that duplicate contact records are not created, the new contact will initially be marked as 'unapproved' and they will need to approve or reject them.

It is extremely important that you always search for contacts before creating any new contact records. If new contacts are created the person responsible for handling/managing the record must ensure they follow the correct process when they approve the contact. **It is extremely important that we do not create duplicate contacts in RLDatix wherever possible.**

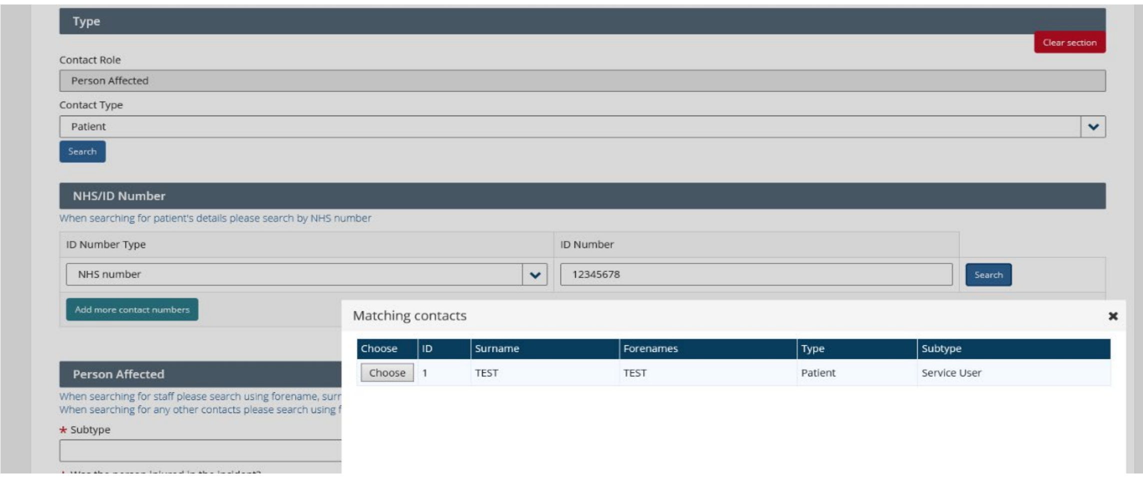
In the contact type field, you must select the Type of Contact that you are searching for.

For Patients

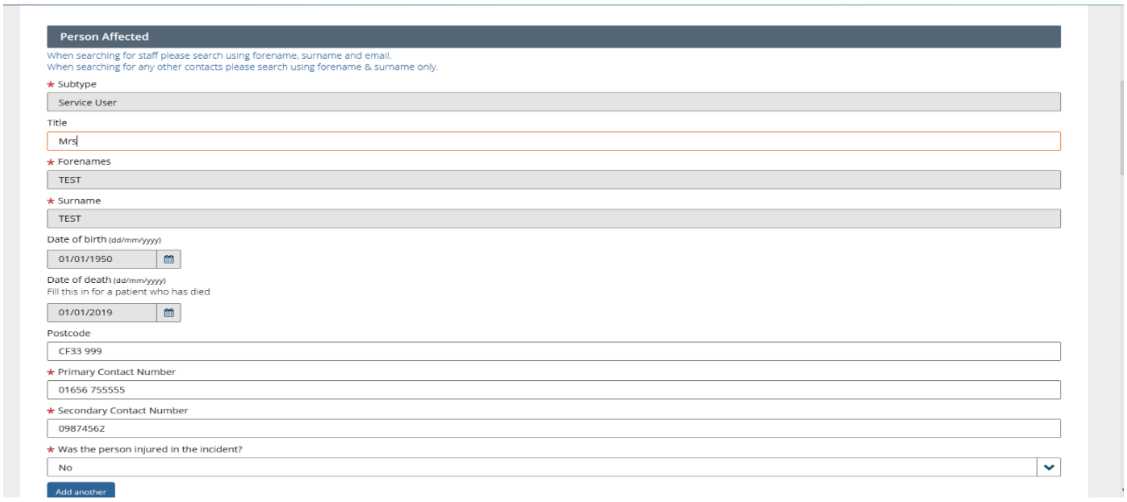
When the Contact Type of Patient is selected you will need to select NHS number in the ID number Type field, in the ID number field enter the patients NHS number and select search, the system is integrated with the Master Patient Index and will pull the demographic details of the Patient into the system.

If you do not have the NHS number and the Patient's contact information is already in the database, you can also search using Hospital number. If you do not have the Patient's NHS number, you will need to look this information up in your Patient Information system (e.g. Myrddin).

Once you confirm this is the correct Patient, select choose, if it is not please click clear section. A further search will need to be carried out or manually add the patient's details in.



Basic demographic information will be returned at this point, however additional patient demographic information will be available in the contacts database. If any data is missing from visible fields and you have this information, then please add it to the record e.g. e-mail address. The data that has been populated will be greyed out and read only on the form.



For Employee/Member of Staff

For best search results when searching for staff then please add in the forename, surname and email address. If you do not select all of these fields prior to searching you may be presented with a large number of contacts on your list to choose. If the employee/member of staff is not presented to you then you can manually input the staff details, however, this will then need to be checked and approved by the person responsible for managing the record.

Any Other Contacts

When searching for any other contacts please search using forename & surname only. If the contact is not presented to you then you can manually input the staff details, however, this will then need to be checked and approved by the person responsible for managing the record.

*Please note the search button is currently in the Type section of the form – we are working with RLDatix to relocate this field to more suitable place on the form.

Approval of Contacts

The person responsible for a managing the record will need to check all contacts are approved:

- Click 'People Involved' to confirm their contact details. This brings up a list of staff/people involved
- If the contact shows as unapproved (red) in the approval status – click on the name to confirm the contact details

People Affected

ID	Type	ID Number Type	ID Numbers	Subtype	Surname	Forenames	Date of birth	Age	Language	Tel 1	Approval status
8344	Patient		12345678	Service User	Buckland	Christine					Unapproved

Create a new Person Affected link

Employees

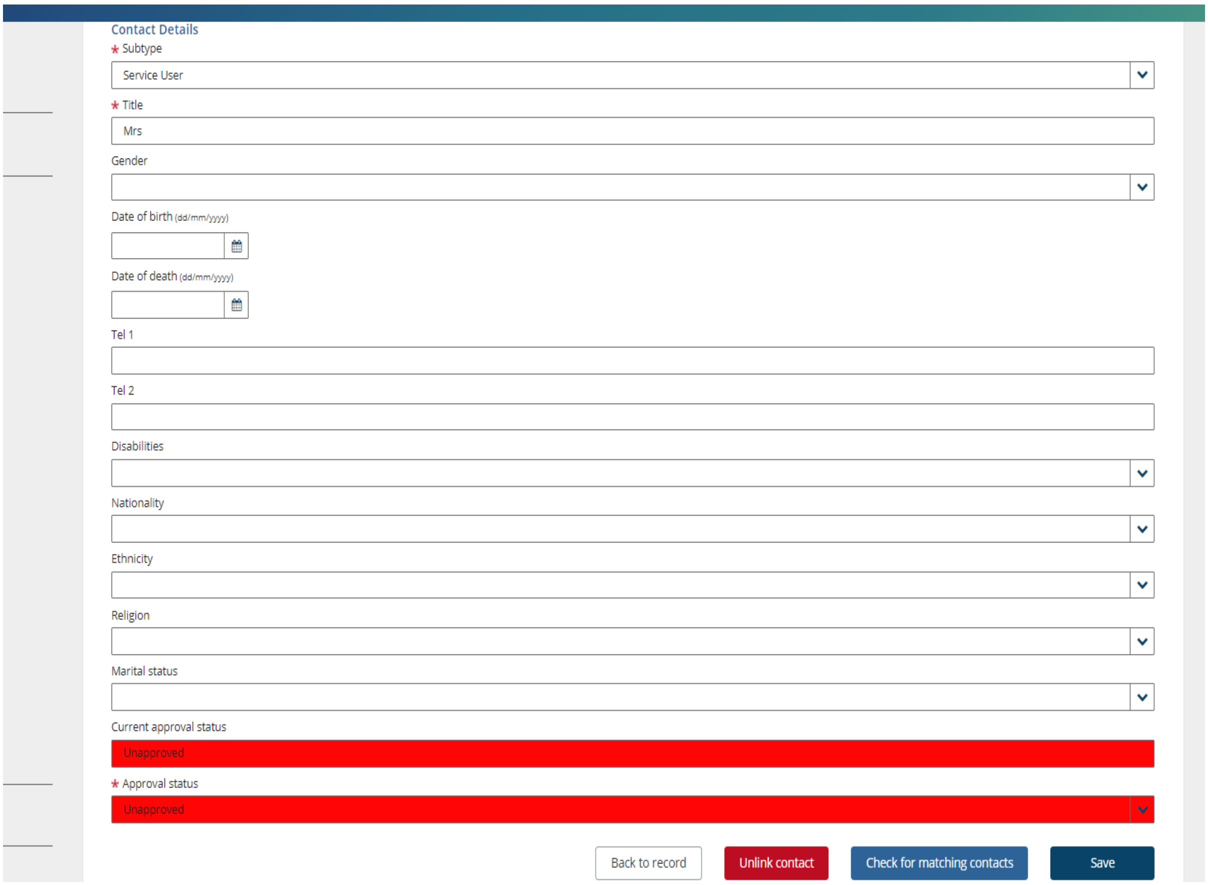
No Employees

Create a new Employee link

Other contacts

ID	Type	Surname	Forenames	Role	Email	Tel 1	Approval status
8345	Employee/Member of Staff	Roberts	Lisa	Reporter	Lisa.Roberts@wales.nhs.uk		Approved

Check the contact details are correct and add any additional information you may have - At the bottom of form Click on the 'Check for matching contacts' button to confirm if there is already an approved contact for the contact.



If you find the correct contact, please select choose. This contact record will then replace the contact record of the unapproved contact.

If no matching contacts are found the user needs to amend the 'Approval status' field. This is done by clicking on the drop down arrow at the side of the field – the user should then select 'Approved' from the drop down list.

The 'Approval status' field will then be updated. The user then needs to click the 'save' button – this will link the record to the user.

The contacts that have been searched for correctly and are available in the system will automatically be approved.

Welsh Risk Pool (WRP)

All information relevant to WRP is recorded in this section. The fields that you are required to complete for WRP are described in the table below.

Field name	**Description**
Is LFE Triggered	If yes is selected, the following additional questions are triggered:
Welsh Risk Pool Ref No	WRP Reference number
Status of Learning	Select Status of Learning from drop down box
LFE Trigger Date	LFE Trigger date (format = dd/mm/yyyy)
LFE Due date (60 days)	LFE Due date (format = dd/mm/yyyy)
Learning Requested	Date Learning Requested (format = dd/mm/yyyy)
Learning Received	Date Learning Received (format = dd/mm/yyyy)
LFE Submitted	Date LFE Submitted (format = dd/mm/yyyy)
LFE Approved	Date LFE Approved (format = dd/mm/yyyy)
Is this Case over £25k	Select Yes or No
Potential to exceed £1m	If case has potential to exceed £1million, select 'yes' and additional question is triggered: WG approval received (format = dd/mm/yyyy)
WG approval received	Date Welsh Government approval received
CMR Trigger Date	CMR Trigger Date (format = dd/mm/yyyy)
Date Case Management Report (CMR) Due	Date CMR Due (format = dd/mm/yyyy)
Case Management Report (CMR) Sent	Date CMR Sent (format = dd/mm/yyyy)

Investigation

All cases require an Investigation the case handler must add the Investigator/s details and the start date of the Investigation as soon as the investigator is identified.

Once the Investigation is complete, the investigator is required to complete the Investigation Outcome panel. The fields required to be completed are:

Investigation Outcome	Date completed	Date investigation completed (dd/mm/yyyy)
	Outcome of review / investigation (PTR Grading Framework)	No issues/Failures (Grade 1 – None)
		No issues/Failures but some learning points (Grade 1 – None)
		Issues/Failures causing NO HARM > Lessons or Learning points identified (Grade 1 – none)
		Issues/Failures causing MINOR > Lessons or Learning points identified (Grade 2 – low)
		Issues/Failures causing MODERATE > Lessons or Learning points identified (Grade 3 – moderate)
		Issues/Failures causing SIGNIFICANT harm > Lessons or Learning points identified (Grade 4 – Severe)
		Issues/Failures causing DEATH > Lessons or Learning points identified (Grade 5 – Death)
	Lessons Code	This is where any issues/failings are to be identified
	Sub-Failings	This provides further detail of the issues/failings which were identified
	Lessons learned	Free type text box for additional information relating to lessons learned

Note: The investigation screen must be fully completed before the case can be closed

Finance

To add any payments to the record, click ‘Add a new payment’. The fields needed to add payments to a Claims Record are described in the table below:

Field	Description
ID	Auto-populated entry
Module	Auto-populated entry
Linked record ID	Auto-populated entry
Date of payment	Date of the payment (dd/mm/yyyy)
Type	Select if type of payment
Sub-type	The reason for the payment
Payment Description	Details of the payment
Payee	The person who will receive the payment – selected from the drop down list
Representative	Details of any representatives involved
Net Amount	The amount of the payment excluding VAT. The ‘£’ symbol is not required.
VAT rate (%)	The Value Added Tax (VAT) rate percentage. The ‘%’ sign is not required.
VAT Amount	The Value Added Tax (VAT) amount which is auto-populated
Total	The total payment including Value Added Tax (VAT) which is auto-populated

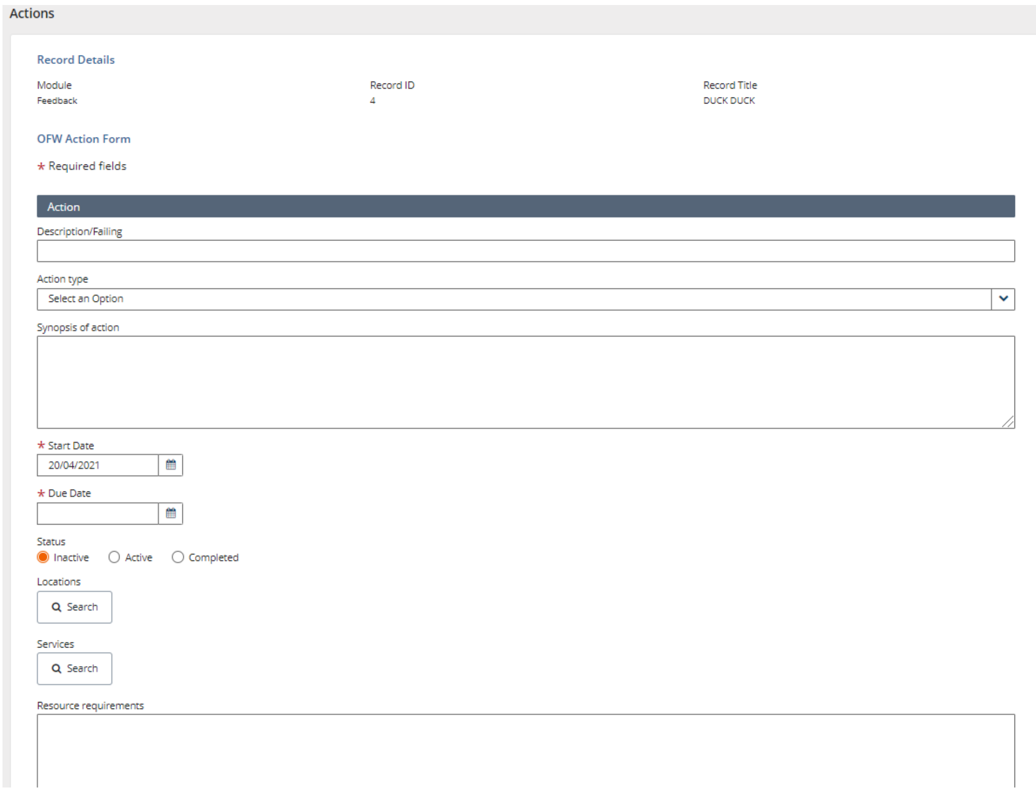
Actions

The Actions module will need to be completed where any issues/failures have been identified. All actions must be added to the record separately. Example of two actions have been identified

- The need to update a policy
- The need to deliver training

You will need to add these actions in one at a time and ensure you assign the correct staff member responsible for managing the action through to the completion against the record. You can do this by:

1. Click Create a new action.
2. Complete all the required fields.
3. In the Assigned To section, click Search.
4. In the Forename and Surname fields, enter a name.
5. Click Search.
6. Select a contact. You can add multiple contacts.
7. Click Save Action



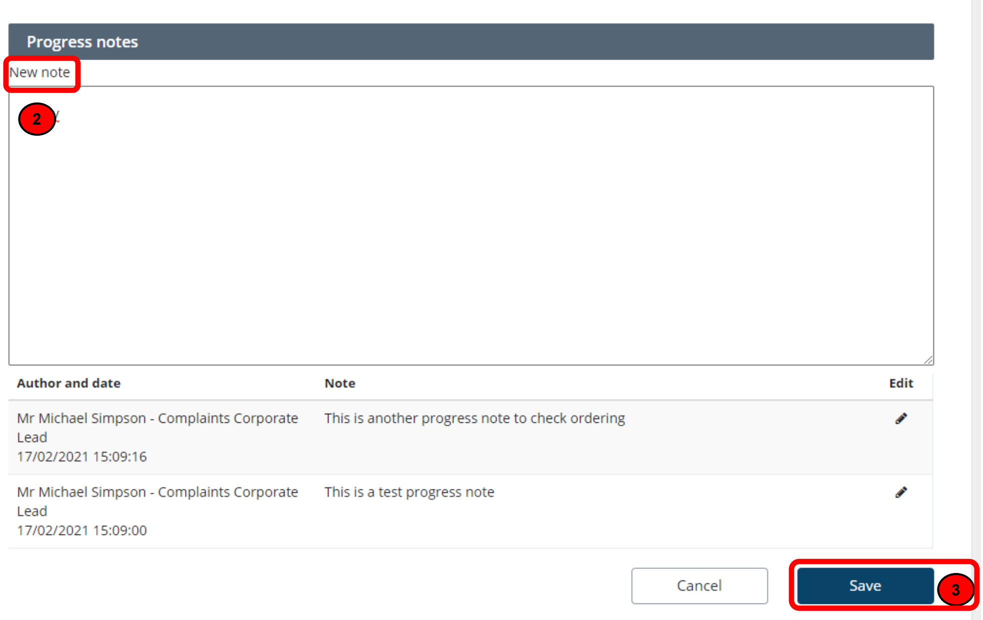
The action assignee receives an automatic email notifying them that they have been assigned an action. They are also notified if you update the action.

Action plans can be created from the actions attached to your feedback record.

Progress Notes

Progress notes are a way of adding notes to records that will be given a time stamp. Users can be given rights to edit all progress notes or just their own by the administrator.

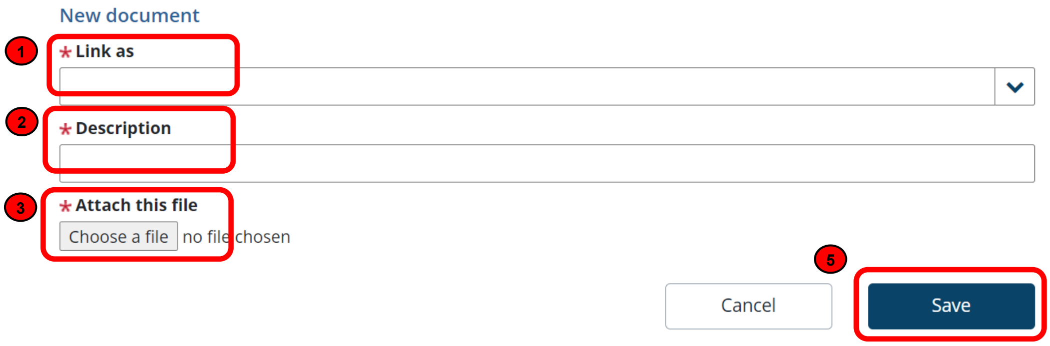
1. Click Progress notes in the left-hand navigation menu.
2. Type into the Notepad field
3. Click Save.



Documents and Templates

To add a new document, click 'Attach A New Document'

1. Select a format from the Link As drop-down list.
2. Type a description of the document in the Description field.
3. Click Browse from the Attach This File field and navigate to the file on your computer.
4. Select the file and click Open
5. Click Save.



To add a new template

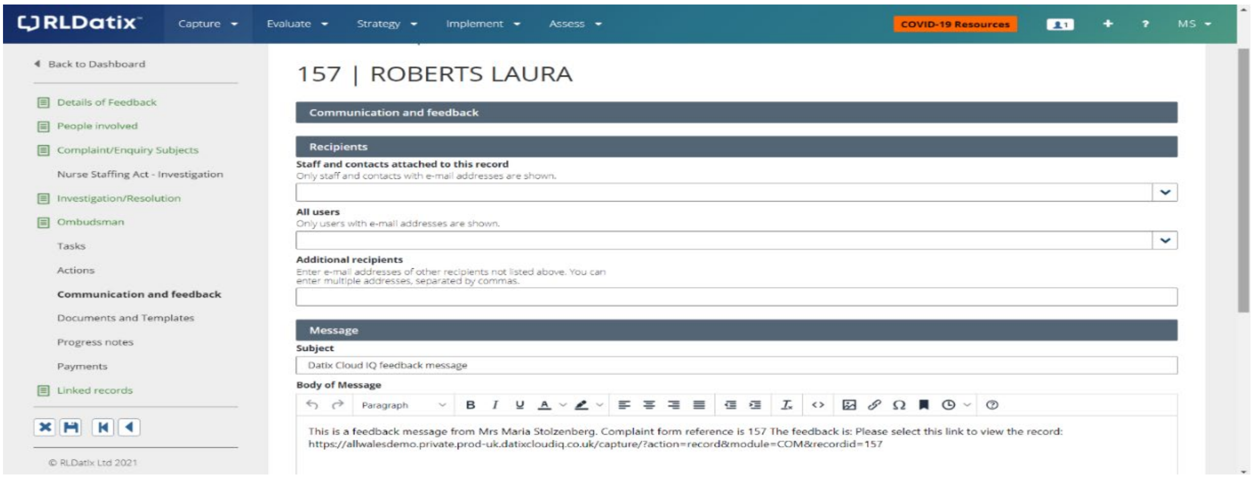
- Select the document template you want to merge from the Word Document drop-down list.
- Click Merge into a template. The relevant field values from the feedback record are merged into the document template

Communication and Feedback

The Communication and Feedback section is used to send emails directly from DatixCloudIQ.

When you send an email from DatixCloudIQ, the system logs the email directly in the record as message history. Responses to the email will be sent to the sender's usual email account and will need to be added to the record as a document.

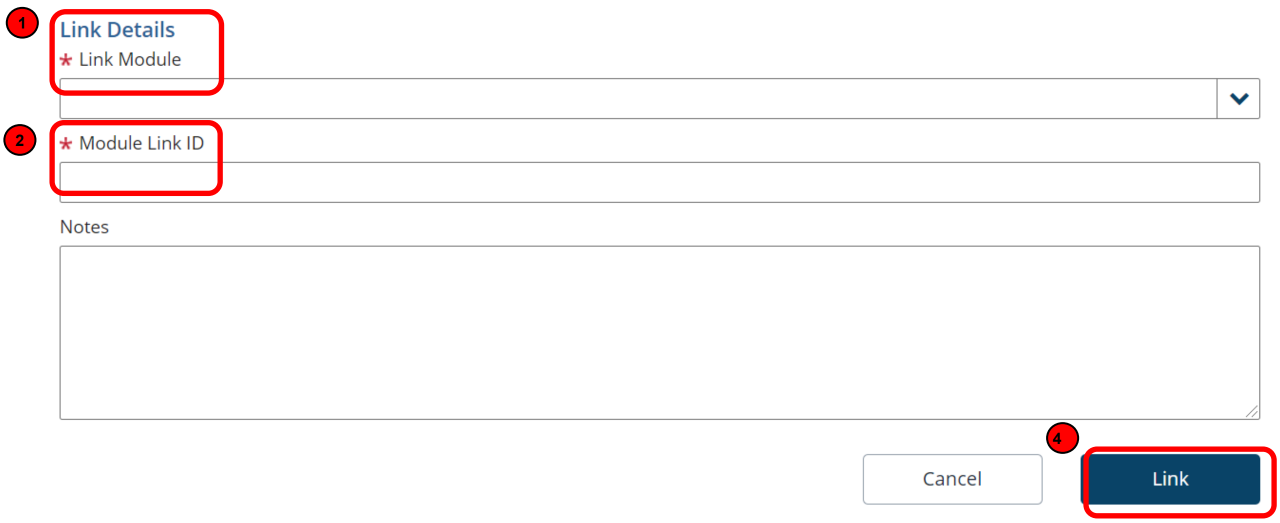
In addition to sending an email, you can include a document that has already been saved to the record. To do this, please select a document (or multiple documents if necessary) from the drop-down list in the **'Communication & Feedback Document Attachment'** of the Communication and Feedback section, amend the title and body of the email message as appropriate and click send.



Linked Records

This gives you the ability to link records together, e.g. where an incident record is linked to a claim. Make a note of the Function (Module) and Record ID number you want to link to the record.

1. Click 'Link another record'
2. In the Link Module drop-down list, select the module.
3. In the Module Link ID enter the Record ID to link to this feedback record.
4. Clink Link.
5. Click Save.



Final Check list before closing down a Claim record

- All fields have been completed accurately
- The Investigation panel has been completed and reflects the outcome of the investigation
- All actions that have been identified from the Investigation have been added to the record and closed if possible (if this is recorded against the incident or complaint record please ensure the records are linked)
- All relevant documentation has been uploaded
- Any Unapproved Contacts highlighted in RED will need to be approved or updated
- All staff involved will need to be added as a contact, including the completion of their role they undertook within the Claim / Inquest i.e., witness, provided comments, etc

Basic Search and Reporting

When performing a search, you will be shown a copy of your claim form. You can select any values from a field in order to search for them. For example, if you wanted to see a specific claim record and you had the ID number you could enter this into the ID field and Click on Search. If it is relating to a particular type and location, you would simply select that type of claim and the location in the drop down and Click Search.

Below are some handy hints for searching:

Symbol	Explanation
*	Wildcard searches are particularly useful for searching within text boxes. For example, to show all complaints where the word "Needle" appears in the description, you would search for*needle*. This would locate the word where any text can come before it, or after it.
=	Searches for all records where a particular field has no value recorded in it. For example, an = sign in the "Closed Date" field would return all records where there is no recorded closed date.
==	Searches for all records where a particular field has a value recorded in it, regardless of what it is. For example, == in the "Closed Date" field would return all records where a closed date has been recorded.

For additional information on features such as reporting and other functionality common across the Capture module, a separate guide will be produced. Alternatively, please contact your Local System Lead.

Appendix One - Stages

CODE	DESCRIPTION
ADBR	Liability - Breach of Duty admitted
ADMBC	Liability - Breach of Duty and Causation admitted
AUTREC	Authorisation received
AUTREQ	Authorisation requested
AWARTL	Liability - Awaiting response to liability
AWASOP	Awaiting service of proceedings
BOD	Liability - Breach of Duty admitted, Causation denied
CLA1	Case Conference scheduled
CLA2	Case Conference held
CLA3	RTM Scheduled
CLA4	RTM Held
CLA5	Executive Board Briefing
CLA6	Executive Board/Team approval requested
CLA7	List of documents signed
CLA8	Liability - Split on liability with another defendant
CLAD	Claim Discontinued
CLAW	Claim Withdrawn
CLINC	Clinician / Clinical comments sought
CONNEG	Liability - Admitted, Contributory Negligence Alleged
COPLIS	COP hearing listed
COSTA	Costs Agreed
COSTP	Costs POD or Appeal
COSTPA	Costs Payment on Account Made
COSTUN	Costs Under Negotiation
COUPI	Court Proceedings Issued
COUPR	Court Proceedings Received
COURAD	Court Approval Declined
CRU1	CRU - Benefits challenged
CRU2	CRU - Review Successful
DEFS	Defence Served
DEN	Liability - Denied
DENC	Denial/Causation
DIS	Disclosure of Records
DOR12	Dormant over 12 months
DRAPP	Draft Response approved internally
DRESE	Draft Response to Executives
EXCHER	Experts - Exchange of Expert Reports
EXCHWR	Exchange of Witness Statements
EXPO	Expert Report on Liability/Causation to be Obtained
EXPR	Expert Report on Liability/Causation Received
EXRO	Expert Report on Condition/Prognosis to be Obtained
EXRR	Expert Report on Condition/Prognosis Received
FRM	Service of Claim Form/Particulars of Claim
FRREQ	Final Reimbursement Requested from WRP

IHCOM	Obtaining In-house Comments/Views Received
INQLIS	Inquest listed
INQPRE	Pre-Inquest Hearing listed
INRREC	Interim reimbursement received from WRP
INRREQ	Interim reimbursement requested from WRP
INTER	Interim Payment Agreed/Payment into Court
JOINT	Experts - Joint Meeting of Experts
LET	Letter of Claim
LETON	Letter of Notification
LFEAPP	LFE Report approved by WRP
LORADM	Letter of Response Served - making admissions
LORDEN	Letter of Response Served - denying liability
LTRACT	Letter before Action
MEDRPT	Outstanding Claimant Medical Report
NHSCHG	CRU-NHS charges challenged
P36AC	Part 36 Offer Accepted by Claimant
P36AT	Part 36 Offer Accepted by Health Body
P36DC	Part 36 Offer Declined by Claimant
P36DT	Part 36 Offer Declined by Health Body
P36MC	Part 36 Offer Made by Claimant
P36T	Part 36 Offer Made by Health Body
PAR	Particulars of Claim
PAYAG	Damaged Payment on Account Agreed
PAYM	Damages Payment on Account Made
RADDIS	Radiology Disclosed
REFLAR	Referred to Legal & Risk Services
REQU	Request for Medical Records
SCHDS	Schedule of Special Damages Served
SETT	Settled before Proceedings
SETTCA	Settled Subject to Court Approval
SETTLR	Settled for Litigation Risk
SETTOC	Settled out of Court
SETTWA	Settled without Admissions
SSAGR	Structured Settlement Agreed
TFRPTR	Transfer from PTR / Redress
THIRP	Third Party Liability Identified
TRIAF	Trial - Appeal filed
TRIAL	Trial - Appeal lost
TRIAW	Trial - Appeal won
TRIDAT	Trial - Defended at Trial
TRIJ	Trial - Judgement found against the Trust
TRISD	Trial - Set-down for Trial
WGAREC	WG approval received
WGAREQ	WG approval required
WRPAPP	Final Reimbursement from WRP received

Appendix Two – Payment Types

CODE	DESCRIPTION
CLACST	Claimant's Costs
DAMAGE	Damages
DEFCST	Defence Costs
GENADV	General Advice
RECPTS	Receipts

Appendix Three – Payment Sub Types

CODE	DESCRIPTION
CC003	Application Costs
CC0001	Interim Payment of Claimant's Costs
CC0002	Settlement of Claimant's Costs
DG0004	Court Funds Office Payment
DC0001	Copy Records
DC0002	Costs Draftsman
DC0003	Counsel Fees
DC0004	Court Fees
DC0005	Defence Solicitor Fees
DC0006	Expert Advice
DC0007	PADA
DC0008	Travelling Expenses - Claimant
DC0009	Travelling Expenses - Defendant
DG0001	CRU Payment
DG0002	Interim Payment of Damages
DG0003	Settlement of Damages
GA0001	Legal Advice
GG0002	Expert Advice
DC0010	Mediation Fees
RC0001	Miscellaneous Receipt / Reimbursement
RC0002	Reimbursement of Claimant's Costs
RC0003	Reimbursement of CRU
RC0004	Reimbursement of Damages
RC0005	Reimbursement of Defence Costs
RC0006	Reimbursement of General Advice
RC0007	WRP Reimbursement