AIG CS

CSO-WC (Claims Systems Online – Workers Comp)

Training Needs Analysis

Prepared by:

Mike Swift, Director

Information Services Group
Technology Training & Educational Technologies

AIGCS is rolling out the new version of it workers compensation claims handling system, CSO-WC, within the several months. This system offers new functionality, improved performance, and tighter workflow controls specific to individual users and user groups. AIGCS is requesting a deployment over a two month time from with on-site classroom training and follow-up trainer support for several days after the training concludes.

The Audience

Almost 1,700 users will need to be trained. The user group is composed of 50 unique job titles. They are in 31 different locations/offices. Within the overall organizational structure there are specialty groups with unique needs. Like other claims groups that Training has worked with previously, they are busy professionals who want tight, focused training. They want to spend the least amount of time away from their work as possible. Training must be targeted to specific needs, convey what is new and different, and what the user needs to know to go back to their desk and use the new tool for their job.

Traditionally, claims offices want to schedule their own people into their training sessions. They take guidance from ISG Training as to what courses people should take and in what order but they prefer to slot their own people. Some offices try to organize by work unit. Others organize by job titles. This has some impact on schedules and sequences of classes. However the biggest impact is to make sure that courses are designed in discrete pieces that can be targeted to users in different ways.

Available Resources

A lead trainer is assigned to the current workers compensation system. Six other trainers have significant experience training on that system. One instructional designer worked on the last new system rollout.

There are training materials available for the existing system. Additionally, a large amount of intranet content has been accumulated that addresses training/usage issues and business/workflow issues. Existing training materials are available online.

Many of the artifacts from the last system rollout such as schedules, plans, workflow analysis, user profiles, etc. are available. These will be likely be leveraged during the rollout of the new system.

The latest development version of the new system is in the QA lab and business users have been testing the system for several months.

Instructional Analysis

In reviewing the business requirements and systems specifications it became apparent that a new "menu profile" setting is key to how the system will look to the user. The menu profile determines what functional components of the system are available. For example, the Investigative Services Group has unique tools. Their menu profiles will allow them to see those functions. Some other menu profiles provide limited access to them.

The menu profile also controls access to the features within the functions. For example both a unit manager and a division manager have access to financial functions. However, a division manager has much broader access and more functional authority than lower level manager.

This implies that training will need to be organized into segments that address different functions and also the depth of activities and tasks within those functions.

Preparation

Two instructional designers have been assigned to this project. Several months ago the lead trainer for the current system spent extensive time with them going through the old system. This included a review of existing training and support materials as well as a detailed review of various user roles and how they use the system.

Screen captures of the existing system have been collected and documented. They have been cataloged by function and users so they can be mapped to the new system.

A lead business analysts for the new system also walked the lead trainer and instructional designers through the new system changes and assisted in a mapping of existing functions to new functions.

System Review

After the instructional design team was prepared, they began sitting with business users brought into the QA lab to assist in testing and validation. The team tried to sit with at least two or three users in each job title. They have been documenting how the users in each job title use the system as well as their perceptions of how the system has changed from the current version. Any new functionality was noted. They also created maps of the old screens the users worked with to the new system screens.

Not all of the 50 different job titles have been into the QA lab. In some cases the team was able to get the usage information from a person who is a manager of one of those job titles. In these cases the information was confirmed through more than one manager.

Results

The team has been able to confirm the functional usage by job title and identify where training in a particular function must to be targeted to meet the needs of a specific job title or group.

Ten functional course topics were identified:

- Getting Started
- Case Creation
- File Inquiry
- File Transfer
- Financials
- Tools
- Litigation
- Customer Service Goals (CSG)
- Investigation
- NIFS (National Inventory File System)

Several of these topics need to be focused for specific user groups.

- Case Creation needs two courses; a full Case Creation course and a shorter more specific course for Litigation, Investigation, and Medical units.
- File Transfer is basically the same for all users except adjusters. They have lesser needs in this area and will require about half the training. Since there are almost 600 users with adjuster in

their job title it makes sense to have a course for adjustors and one for all other users. This will save about 450-750 man hours of classroom training.

- Financials is one of the more complex modules. The Litigation and Investigation users have a least needs in this area so there should be a course specifically for those users. Other users of this module include adjusters, managers, analysts, and support staff. The analysts and support staff have a few more functions. Training them together would add about 30 minutes of classroom time for almost a thousand users (adjusters and managers) so it makes sense to break this module into two more courses.
- The Tools module is also extensive. Litigation and Investigation users have fewer needs in this module so they should have their own course. All other users will follow the same curriculum.
- All users of the Litigation functions have similar training needs with the exception of the Medical unit staff. They use about one third of the functionality. There are less than 150 users but having a specific course may provide opportunities to group all Medical Unit staff together for joint training sessions. Breaking this module into two courses will provide more flexibility in actual scheduling classes.
- The Investigation function is similar to Litigation. The Medical unit has less required training and less than 150 users but having an Investigation course just for Medical will provide more flexibility in course scheduling.
- The NIFS functions are so minor they should simply be covered in a course that all users attend such as a Getting Started course. It could also be covered as part of File Inquiry.

Course Offerings

The following table summarized the 10 Functional Course Topics and 17 proposed Course Titles:

Functional Course Topic	**Course Title**	**Course Hours**
Getting Started	• All Users	1.0 hours
Case Creation	• Full case creation • Case creation for Litigation, Investigation, and Medical Units	5.5 hours 1.0 hours
File Inquiry	• All users	1.5 hours
File Transfer	• File transfer for Adjusters • File transfer for all other users	1.0 hours 2.0 hours
Financials	• Financials for Litigation and Investigation Units • Financials for Adjusters / Managers • Financials for Analysts and Support Staff	1.0 hours 5.5 hours 6.0 hours
Tools	• Tools for Litigation and Investigation Units • Tools for all other users	1.5 hours 4.0 hours
Litigation	• Litigation for Medical Unit • Litigations for all other users	1.0 hours 3.0 hours
Customer Service Goals (CSG)	• Managers, Supervisors, and Directors	1.0 hours
Investigation	• Investigation for Medical Unit • Investigation for all other users	1.0 hours 5.5 hours
NIFS (National Inventory File System)	• Integrate into Getting Started	Only a few minutes

Training Tracks

With 50 job titles and 17 course titles it would appear that there are a vast number of enrollment combinations. However, analysis of the job titles mapped to the course topics determined that there are actually only 10 “training tracks”. These tracks are listed below and are indicative of the ways that trainees with similar job titles could be grouped into common classes.

Job Titles	Training Track Course Titles	Job Titles	Training Track Course Titles
Support Staff	Getting Started Case Creation-Full File Inquiry File Transfer Financials Investigation Litigation Tools	Medical Management Unit / Consultant Medical Management Unit / ERTW Specialist Medical Management Unit / Nurse Reviewer Medical Management Unit / Staff	Getting Started Case Creation-Lit/Inv/Med File Inquiry File Transfer Investigation-MMU Litigation-MMU Tools-ISD/Lit
Support Manager	Getting Started Case Creation-Full File Inquiry File Transfer Financials-Adj Investigation Litigation Tools CGS	Compensability Unit - Lost Time / Staff Compensability Unit - Medical Only / Staff Critical Claim Unit / Staff Disability Management Unit / Staff Office / Staff Resolution Unit / Staff	Getting Started File Inquiry File Transfer Financials-Adj-Mgr Investigation Litigation Tools
Investigative Services Division / Admin. Asst. Investigative Services Division / Claims Investigator Investigative Services Division / Fraud Investigator Investigative Services Division / Investigation Supervisor Litigation Unit / Hearing Representative Litigation Unit / Staff	Getting Started Case Creation-Lit/Inv/Med File Inquiry File Transfer Financials-ISD/Lit Investigation Litigation Tools-ISD/Lit	Medical Management Unit / Manager Medical Management Unit / Case Manager	Getting Started Case Creation-Lit/Inv/Med File Inquiry File Transfer Financials-Adj Investigation-MMU Litigation-MMU Tools CSG
Investigative Services Division / Investigation Manager	Getting Started Case Creation-Lit/Inv/Med File Inquiry File Transfer Financials-ISD/Lit Investigation Litigation Tools-ISD/Lit CSG	AIGRM / Supervisor AIGRM / Manager AIGRM / Director Compensability Unit - Medical Only / Manager Compensability Unit - Lost Time / Manager Critical Claim Unit - Employers Liability / Manager Critical Claim Unit / Manager Disability Management Unit / Manager Home Office / Manager Office / Manager Region / Manager Resolution Unit / Manager	Getting Started File Inquiry File Transfer Financials-Adj-Mgr Investigation Litigation Tools CGS
Medical Management Unit / PBA Analyst	Getting Started Case Creation-Lit/Inv/Med File Inquiry File Transfer Financials-Inv/MMU Litigation-MMU Tools	AIGRM / Admin. Asst. AIGRM / Analyst AIGRM / Staff Home Office / Examiner Home Office / Staff Office / Administrative Assistant Region / Staff	Getting Started File Inquiry File Transfer Investigation Litigation Tools

Job Titles	Training Track Course Titles	Job Titles	Training Track Course Titles
Compensability Unit - Lost Time / Adjuster Compensability Unit Medical Only / Adjuster Critical Claim Unit / Adjuster Disability Management Unit/ Adjuster Resolution Unit / Adjuster	Getting Started File Inquiry File Transfer-Adjusters Financials-Adj-Mgr Investigation Litigation Tools		

Training Support Materials

There is little interest in creating user manuals for the new system. Claims management has expressed their preference for online support tools and quick reference cards. Both of these can be easily updated and reposted online with the latest information. Additionally, the material can be augmented with business and workflow topics that are critical in specific portions of the system.

The training team would like to create a few PowerPoint slides to use in specific portions of the training that deal with conceptual points and/or high-level views of topics. The training team would also like instructor notes for each course. These will be posted on the training intranet site and updated throughout the deployment so each trainer or training team has the latest notes available.

The instructional design team and the trainers who have been involved in reviewing the new system have extensive notes that cover the system as a whole and each individual module. These notes are extremely valuable for two purposes.

First, the instructional designers and trainers worked with many business users in the QA lab who were new to the system. They observed first hand the places where users had questions or issues. These observations and notes will be useful in determining quick reference card content and also for instructor notes.

Secondly, many of the business users were toggling between the old system and the new system during testing to compare results. The notes collected through observation and discussions will be used for instructor notes to assist in explaining transition issues and new features.

The instructional design team has the material they need to begin creating the instructional support materials. Quick reference cards will be created for each module. Total time required to create these will be less than four weeks but they will need to be reviewed and possibly updated when the deployment version of the system is finalized.

The instructional design team will also begin creating the new system intranet site and populating it with draft content as it is available. This will include any content provided from claims business training, the project team, and AIGCS management.

The instructional design team will also assist the trainers in compiling instructor notes, PowerPoint slides, and any other training aids they determine are necessary.

Sample Two-sided Quick Reference Card for Getting Started Course

CSO Getting Started

Logging on to CSO

1. Double-click the CSO icon on your windows desktop. This will open the Log On CSO window.
2. Type your application user ID in the **User ID** field.
3. Type your password in the **Password** field.
4. (Optional) Type your DynaComm (mainframe) password in the **M/F Password** field.
5. Click the **Log On** button. The CSO Main Menu displays.

Note: Not all users will have access to the same menu items. For example, if you do not have access to the Litigation module, you will not see **Litigation** on the main menu

Function Key Shortcuts

F1 Press TAB to select a field or button. Press F1 to open Help regarding the selected field or button.

F2 From within an ellipses date field, press F2 to delete a previously entered date.

F3 From within an ellipses date field, press F3 to fill a date field with the current date.

F4 From within an ellipses date field, press F4 to open the pop-up calendar. From within a list box, click F4 to display the list of items.

Tips and Tricks

- If you need to use any other system in DynaComm, you must open CSO first and then DynaComm.
- To exit the Sprint (screen print software) window, click **OK**. Do not click **Cancel** or ☒. If you do, you will not be able to print CSO windows!
- On any window allowing you to perform a search, you can initiate the search by pressing ENTER. You do not need to use the mouse to click **Search**.
- To maximize system performance, minimize windows you are not using.

Claim Status Codes

Code	Meaning
B	Subro Reserve Open
C	All Reserves Closed
M	Mistake
N	Notice Only
O	At Least One Reserve Open
R	Recovery Reserve Open
S	Symbol Abstracted, No Financials
U	No Claim: Closed Without Payment
V	Symbol Verified
Y	Symbol Partially Abstracted

Important Buttons

Address File: Click to enter, update or view name and address information. Displayed when no names have ever been added to the Address File or when two or more names have been added.

Address File Card: Click to enter, update, or view name and address information. Displayed when only one name has been added to the Address File.

Notebook: Click to add comments, activity notes, etc. to a claim.

Visual Speller: Click to check the spelling of text entered in various windows throughout the system.

Pick List: Click to choose from a list of standard information from the corresponding field.

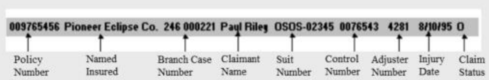
Drop-Down List: Click to choose from a list of standard information from the corresponding field.

Ellipses Date Field: Click to open the calendar window.

Next Page Arrow: Click to move to the next window to be completed.

The Status Bar

This bar displays at the bottom of the window when the CSO Workers Compensation system is running:



Refer frequently to the Status Bar. Be sure you are working on the proper claim or suit!

ISG Client Services

http://access4.aig.com/isg/
help desk: 1-800-HELP-HLP

ISG Client Services

CSO Getting Started: Working With Claims

Loading a Claim to the Status Bar

To Load a Claim via Claim Search:

1. From the **File** menu, select **Claim Search**. The Claim Search window opens.
2. Choose the method by which you want to search:

   Option A: Type the claimant's last name in the **Last Name** field (or part of the name). Enter information in any or all of the following fields to further narrow the search: **First Name**, **Date of Birth**, **Date of Injury**, **Handling Office**. Go to Step 3

   Option B: Type the branch-case number in the **Branch-Case** field. Go to Step 3.

   Option C: Type the social security number in the **SSN** field. Go to Step 3.
3. Click **Search**. The list box in the Claim Search window fills with a list of claims resulting from the search criteria entered.
4. Click the claim you wish to load to the Status Bar.
5. Click **Done**. The selected claim loads to the Status Bar.

To Load a Claim via Get Claim:

- On certain windows, the Get Claim option is available for changing the claim on the status bar.
- To change the claim, enter the branch and case number in the **Branch-Case** field and click the **Get Claim** button.

To Load a Claim via Insured Policy Index:

1. From the **File** menu, select **Insured Policy Index**. The Insured Policy Index window opens.
2. Locate the policy you wish to load.
3. Double-click the policy or click **View Claims** to view all claims attached to that policy.
4. Select the desired claim in the claim list box and click **Done**.

Activity Notes

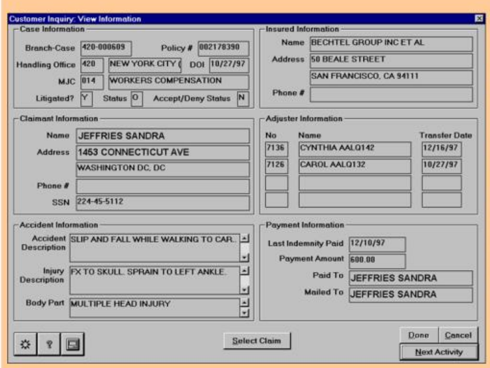
- Use the Activity Notes window when you want to view adjuster notes but do not want to load the file to the Status Bar. You can view Activity Notes for any claim even if you already have a claim loaded to the Status Bar.

Customer Inquiry

When you need quick access to basic information on a claim, use the Customer Inquiry function.

1. From the **File** menu, select **Customer Inquiry**. The Customer Inquiry: Claim Select window opens.
2. In the Customer Inquiry: Claim Select window, enter search criteria (claimant name, SSN, or branch case).
3. From the search results, select the claim you want to view (double-click or highlight and click **Select**).
4. The Customer Inquiry: View Information window opens (shown below).

- If you wish to search for a new claim, click **Next Activity**.
- If you wish to load the claim to your Status Bar, click **Select Claim**.
  Note: Only WC claims can be loaded to the Status Bar.
- This feature is especially useful when indexing claims.
- Note that the claimant's address displayed in the Claimant Information area on this window is the *current* address and not necessarily the address where the last indemnity payment was mailed. To determine the address at the time the last indemnity payment was made, you must look up the payment in the Check Review window of the Payment History.



- In the **Accept/Deny Status** field, Y indicates the claim is denied; N indicates it is accepted; blank indicates the compensable decision has not yet been made.
- The Adjuster Information section displays the history of adjusters for a claim in descending order. The adjuster listed in the top row is the current adjuster for the claim.