

CC-21(a)
CC-6

CITY COUNCIL MEETING
JANUARY 5, 1983

RETAINING OF
FIRM TO AUDIT
CITY'S SELF-INSURED
WORKERS COMPENSATION
AND LIABILITY
PROGRAMS
AUTHORIZED

Following introduction of the matter by Assistant City Manager Glenn, Council, on motion of Mayor Pro Tempore Murphy, Olson second, authorized the City Manager to enter into a Personal Services Contract with Barbara Y. Akk and Associates to audit the City's self-insured workers compensation and liability programs at a fee of \$9,250.00.

COUNCIL COMMUNICATION

TO: THE CITY COUNCIL

FROM: THE CITY MANAGER'S OFFICE

DATE

January 3, 1983

NO.

SUBJECT:

AUDIT OF SELF-INSURED PROGRAMS

RECOMMENDATIONS: The City Council authorize the City Manager to enter into a Personal Services Contract with Barbara Y. Akk & Associates, to audit the City's self-insured Workers Compensation and Liability programs.

BACKGROUND: The City has been self-insured for Workers Compensation since January 1, 1977. The City has contracted with Employers Self Insurance Service (ESIS, Inc.) to provide the day-to-day administration of that program. We have followed their lead and recommendations and are quite satisfied with the results of our program. This is said because our costs are less than they were when we were fully insured. However, we have no criteria to judge whether or not we are maximizing the benefits of being self-insured. We talked with the staff of the California Self-Insurers Association, an educational and lobbying organization to which the City belongs. Their recommendation is as a matter of good management, we should have our program evaluated by an independent auditor that specializes in self-insured program audits. They strongly recommended Barbara Y. Akk & Associates as being highly-qualified to perform such a task.

We do not have the expertise to do this work ourselves. The field of Workers Compensation is quite complex and is an entire body of law.

I have met with Ms. Akk and came away feeling that we would truly receive a professional's evaluation of our present claims administrator and our program.

We have likewise been partially self-insured in the area of liability since February 1977. We have contracted with R. L. Kautz & Company for administration services. There is no particular significance that we have separate administrators for Workers Compensation and Liability. It seems to staff that it is also appropriate for all of the same reasons to have an audit of our liability program performed at the same time as our Workers Compensation program.

Attached hereto is a proposal submitted by Barbara Y. Akk and Associates, to perform both the Workers Compensation and the Liability audits for a combined fee of \$9,250. The cost of these audits are appropriate charges to the Self-Insured Funds.


JERRY L. GLENN
Assistant City Manager

JLG:vc

att.



December 24, 1982

Mr. Jerry Glenn
Assistant City Manager
City of Lodi
221 W. Pine
Lodi, CA 95240

Dear Jerry:

RE: LIABILITY PROGRAM AUDIT
PROPOSAL

Following our discussions and a review of information provided, BARBARA Y. AKK & ASSOCIATES proposes to provide consulting services to the City of Lodi (City). These consulting services will consist of evaluating the current liability claims administrator, R. L. Kautz, and the City's liability claims program.

This program audit will include an analysis of excess costs or fees associated with the program, identification of possible deficiencies in the administration and potential redundancies or omissions in insurance coverages. The primary objective of this project will be to identify how the City's liability claims program is working and to make recommendations to strengthen the entire program.

The following proposal is an addendum to our workers' compensation program audit proposal dated December 16, 1982. Separate fees and a combined fee will be provided in the addendum.

SCOPE OF SERVICES

This engagement will include the following:

- A. Review of internal and external liability claims procedures such as:
1. incident reporting
 2. investigation
 3. determination of liability
 4. promptness of contact with claimants and settlement offers
 5. procedures for litigation and avoidance
 6. quality of settlement
 7. accuracy of computer reports
 8. adequacy of reserving practices and reserves established
 9. subrogation activities and first party recoveries
 10. technical claims competence and expertise

33 Sequoyah View Drive
Oakland, CA 94605
(415) 562-2087

- B. Review of approximately 20-25 closed and 20-25 open liability claims.
- C. Evaluate the existing liability insurance policies including:
 - 1. degree of insurance protection afforded or lacking
 - 2. financial strength of insurers
 - 3. efficiency of insurance market utilization
- D. Review the City activities which create risks of accidental third party losses. This will include both physical and contractual activities.
- E. Analysis of contract administration procedures, particularly with respect to insurance requirements and indemnity agreements
- F. Identify policy and procedures for both the City and R.L. Kautz.
- G. Comment on services provided by R. L. Kautz and recommendations for future action.

PLAN OF ACTION

The objectives of our engagement will be accomplished through a series of activities which include:

- A. Interviews with selected members of management to determine:
 - 1. types and extent of liability loss exposures
 - 2. operational procedures relating to liability loss control and claims management.
- B. A thorough study of existing liability insurance policies to include:
 - 1. an analysis to determine adequacy of coverage, conditions and limits to meet the existing exposures to loss.
 - 2. review of coverage redundancies or coverage omissions and methods of reducing any overlap or gaps.
 - 3. premium cost factors and cash flow considerations
- C. On-site meetings with claims administrator and related staff and/or vendors (e.g. investigators, attorneys) and include specific work such as:
 - 1. identify all costs for claims management
 - 2. interview management personnel of R. L. Kautz to determine types and extent of liability claims procedures.

- D. Prepare a report which will summarize findings and conclusions. This report will specifically address each item evaluated in the claims file audit.

MATERIALS TO BE SUPPLIED CONSULTANT

The following should be made available at the onset of this assignment:

- A. Copies of all forms, procedural manuals, administrative policies, resolutions, ordinances, budget for 1982-83, 83-84, and internal files related to liability program.
- B. Copies of service contract, excess insurance policy, claims statistics*, contracts with outside attorneys, investigator service, etc.
- C. List of City staff involved in the liability program
- D. List of R. L. Kautz personnel involved in the City's program.

* Copy of R.L. Kautz report dated Nov. 82, Nov. 81, Nov. 80, Nov. 79

Summary of all years claims

Key to R. L. Kautz computer run

List of attorneys, addresses, investigators, subrogation and recoveries made during the last five years.

Other information may be requested after the project commences.

COSTS AND TERMS

Professional fees will be accrued as time is expended at per diem rates (for 7½ hr work day) for consultants assigned to the project. The per diem rate is \$500 per day. Fee for the liability program audit including expenses will be \$5,750

If the workers' compensation program audit is also included and one report is generated, this liability proposal maximum fee will be \$5,250.

Both program audits will be a maximum fee of \$9,750.

SPECIFIC REFERENCES

A list of clients served is included in the Appendix of this proposal along with resumes for Mr. Jerry Frick, liability claims auditor. Also, we are going to use another auditor, Leo Heyenrath for the workers' compensation claims file audit and have included addition information.

CONTRACT FOR SERVICES

An order for services is attached to this letter proposal and represents the new contract covering either the workers' compensation, liability program audits or both.

Please sign and send the yellow copy to us to finalize the contract.

We look forward to working with you on this project. We are able to begin each of the audits as follows:

Workers' Compensation

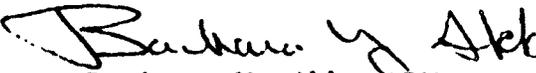
immediately and preferably during the week of January 3rd

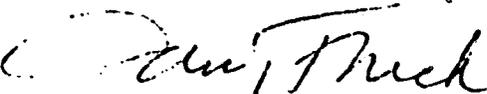
Liability

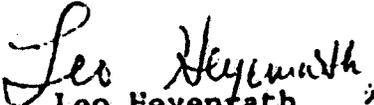
week of January 17th

We can deliver a report approximately 45 days later.

BARBARA Y. AKK & ASSOCIATES


Barbara Y. Akk, ARM
Project Manager


Jerry Frick¹³⁴
Liability Claims Auditor


Leo Heyenrath¹¹
Workers' Compensation Claims Auditor

PREV. REV. 12/16/82

ORDER FOR SERVICES

CLIENT SYMBOL CL
ORDER NO 52-3

LAST REV. _____

DATE 12/27/82

CLIENT NAME
CITY OF LODI

CLIENT NAME IN FULL
ORDER TITLE (IN FULL)
Liability Program and Workers' Compensation Program Audits

BILLING ADDRESS
Mr. Jerry Glenn, Assistant City Manager
City of Lodi
221 W. Pine
Lodi, CA 95240

DESCRIPTION OF SERVICES
Liability pgrm audit incl. claims administrator, R.L. Kautz and/or workers' compensation pgrm audit (as described in proposal dated December 16, 1982) incl. claims administrator, ESIS

ESTIMATED COST: Fee not to exceed: Separate Liability \$5,750
Workers' 4,500
TIME PERIOD: January - March 83 Together Total 9,250*
*\$500 discount for doing both at the same time

ACCEPTED BY:
CITY OF LODI **BARBARA AKK AND ASSOCIATES**
Division of Yurika International Limited

BY _____ Barbara Y. Akk
Barbara Y. Akk, ~~Principal~~ Principal

TITLE _____
DATE _____ 12/27/82 DATE _____

BILLING BASIS: APPLICABLE PER DIEM RATES (FOR NORMAL WORKDAY OF 7.5 HOURS) IN EFFECT FOR THE CLASSIFICATIONS OF PERSONNEL ENGAGED ON THE ABOVE WORK APPLIED TO THE ACTUAL TIME SUCH PERSONNEL ARE SPECIFICALLY SO ENGAGED PLUS REIMBURSEMENT AT COST FOR "OUT-OF-POCKET" EXPENSES.

Responsibility for Services:
In the performance of its services hereunder, AKK AND ASSOCIATES shall exercise the degree of skill and care required by customarily accepted good professional practice. If AKK AND ASSOCIATES fails to meet these standards, its obligation and liability to Client shall be discharged by and limited to AKK AND ASSOCIATES' reperformance, at its own cost and without reimbursement, of any services which do not meet these standards.

AKK AND ASSOCIATES shall not be liable, in contract or tort or otherwise, for any special, indirect or consequential damages, including but not limited to loss of anticipated profits, loss of use, loss of revenue, cost of capital, loss of goodwill, claims of customers, or similar damages, arising out of the performance of AKK AND ASSOCIATES services hereunder. All provisions of this Order providing for limitation of liability shall apply to the full extent permitted by law and regardless of fault.

In the course of performance of its services, AKK AND ASSOCIATES may rely upon information supplied by Client or information available from generally acceptable reputable sources without independent verification.

Delays
Neither party shall be considered in default in the performance of its obligations hereunder to the extent that the performance of such obligations is prevented or delayed by any cause beyond the reasonable control of the affected party, and the time for performance of either party hereunder shall in such event be extended for a period equal to any time lost as contemplated above.

Entire Agreement
This document contains the entire agreement between the parties as to the services rendered hereunder and supersedes all previous or contemporaneous agreements, representations, warranties, promises and conditions.



December 16, 1982

Mr. Jerry Glenn
Assistant City Manager
City of Lodi
Lodi, CA

Dear Jerry:

RE: WORKERS' COMPENSATION PROGRAM AUDIT

Thank you for opportunity to assist the City of Lodi in evaluating the current workers' compensation claims administrator, ESIS, and the City's workers' compensation program.

The audit will include an analysis of current procedures and activities of the City relative to handling workers' compensation claims. The primary objectives of this project will be to identify how the City's workers' compensation program is working and to make recommendations to strengthen the entire program.

SCOPE OF SERVICES

This engagement will include the following:

- A. Review of internal and external workers' compensation claims handling procedures such as:
 1. incident reporting
 2. employee contact and communications
 3. action taken in the first 30, 60, 90 days of a claim
 4. investigation, medical, disability and vocational rehabilitation management
 5. subrogation and financial recovery of losses
 6. notification of excess insurance and State agencies
 7. settlement procedures
 8. litigation procedures
 9. integration of claims and personnel activities (e.g. pre-placement, physical examinations, industrial disability retirement)
- B. Identify policy and procedures for both the City and ESIS.
- C. Assist in identifying statistics, retrievable files and loss records for documentation of claims.
- D. Comment on services provided by ESIS and recommendations for future action.

33 Sequoyah View Drive
Oakland, CA 94605
[415] 562-2087

PLAN OF ACTION

The objectives of our engagement will be accomplished through a series of activities which include:

- A. A planning meeting with the Assistant City Manager. As part of this meeting, specific departments and personnel will be identified that should be involved in the interviewing process.

Additional questionnaires, work sheets and work effort will be identified. This meeting will serve as a basis for directing all of the individuals and work effort. A flow chart from the Culver City Loss Preventional Manual attached illustrates how personnel activities are related.

- B. On site meetings will include specific work such as:
 1. Interviews with the outside claims administrator, ESIS, and possibly, related services (e.g. attorneys, physicians, investigators, voc. rehab. counselors), City staff, and a few injured employees, relative to processing and handling workers' compensation claims.
 2. Review a limited number of claims files, 10-15, to obtain an overview of the claims handling procedures and condition of the file.

MATERIALS TO BE SUPPLIED CONSULTANT

The following should be made available at the onset of this assignment:

- A. Copies of all forms, procedural manuals, administrative policies, resolutions, ordinances and internal files related to the workers' compensation program.
- B. Copies of the service contract, excess insurance policy, claims statistics*, report to the Self-Insurance State Agency, SB 90 Recovery report, contracts with outside attorneys, physicians, etc.
- C. A list of City staff involved in the workers' compensation program and their functions.
- D. A list of ESIS personnel involved with the City's program.

* Copy of ESIS report dated Nov. 82, Nov. 81, Nov. 80;
Copy of report listing employees in alphabetical order,
date of injury, current status of claim and medical/indemnity

costs for the last three years. Sample:

Adams, Mary	1/5/80	C	\$
Adams, Mary	5/4/81	O	\$
Addens, Peter	2/4/80	C	\$

Copy of litigated claims by contract year, total litigated expenses per year

List of attorneys, physicians (panel) investigators and vocational rehabilitation counselors that the City uses and their fees.

Key to the ESIS computer runs.

Other information may be requested after the project commences.

COSTS AND TERMS

Professional fees will be accrued as time is expended at per diem rates (for a 7½ hr work day) for consultants assigned to the project. The per diem rate is \$500 per day. Out-of-pocket expenses for report production, travel costs, toll calls will be added at cost. Invoices will be presented twice a month. The total estimated professional fees and expenses will be \$4,500.

Not listed

ADDITIONAL SERVICES

During the project, any additional services the City may request will be billed separately at per diem rates. Any difficulties arising out of the project requiring attention will be identified. Any related costs to pursue the project will be presented.

SPECIFIC REFERENCES

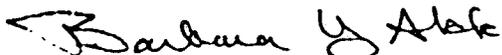
Specific information, resumes and references for Barbara Y. Akk and Gerald M. Surfus are attached.

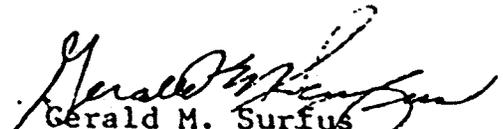
CONTRACT FOR SERVICES

An order for services is attached to this letter proposal and represents the contract. Please sign and send the yellow copy to us to finalize the contract.

We look forward to working with you on this project. We are able to begin preliminary interviews during the week of December 27th and can deliver a report by the end of January, 1983.

BARBARA Y. AKK & ASSOCIATES


Barbara Y. Akk, ARM
Project Manager


Gerald M. Surfus
Principal Consultant

CC 2A

F-4
1/15/83

CITY COUNCIL

FRED M. REID, Mayor
ROBERT G. MURPHY,
Mayor Pro Tempore
EVELYN M. OLSON
JAMES W. PINKERTON, Jr.
JOHN R. (Randy) SNIDER

CITY OF LODI

CITY HALL, 221 WEST PINE STREET
POST OFFICE BOX 320
LODI, CALIFORNIA 95241
(209) 334-5634

HENRY A. CLAVES, Jr.
City Manager
ALICE M. REIMCHE
City Clerk
RONALD M. STEIN
City Attorney

ok
miss B got
1/15/83 + get
cc # + then
file

January _____

Barbara Y. Akk and Associates
33 Sequoyah View Drive
Oakland, CA 94605

Dear Ms. Akk:

Enclosed herewith please find a fully executed duplicate copy of order for services for a Liability Program Audit and Workers Compensation Program Audit as described in your letters of December 16, 1982 and December 27, 1982 which was approved by the Lodi City Council at its regular meeting of January 5, 1983.

The maximum fee for both audits will be \$9,250.00.

Very truly yours,

Alice M. Reimche
Alice M. Reimche
City Clerk

AMR:jj

PREV. REV. 12/5/82

ORDER FOR SERVICES

CLIENT SYMBOL CL

ORDER NO. 52-3

LAST REV. _____

DATE 12/27/82

CLIENT NAME

CITY OF LODI

CLIENT NAME IN FULL

ORDER TITLE (IN FULL)

Liability Program and Workers' Compensation Program Audits

BILLING ADDRESS

Mr. Jerry Glenn, Assistant City Manager
City of Lodi
221 W. Pine
Lodi, CA 95240

DESCRIPTION OF SERVICES

Liability prgm audit incl. claims administrator, R.L. Kautz and/or workers' compensation prgm audit (as described in proposal dated December 16, 1982) incl. claims administrator, ESIS

ESTIMATED COST: Fee not to exceed: Separate Liability \$5,750
Workers' 4,500

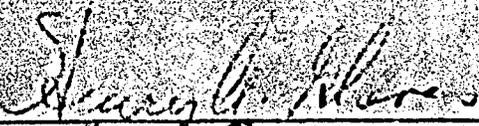
TIME PERIOD: January - March 83 Together Total 9,250*

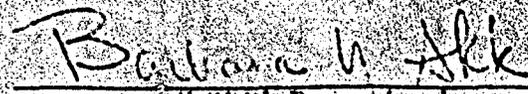
*\$500 discount for doing both at the same time

ACCEPTED BY:

CITY OF LODI

BARBARA AKK AND ASSOCIATES
Division of Yurko International Limited





Henry A. Graves
City Manager

Barbara Y. Akk, *Principal* Principal

TITLE

DATE 1/5/83

DATE 12/27/82

BILLING BASIS: APPLICABLE PER DIEM RATES (FOR NORMAL WORKDAY OF 7.5 HOURS) IN EFFECT FOR THE CLASSIFICATIONS OF PERSONNEL ENGAGED ON THE ABOVE WORK APPLIED TO THE ACTUAL TIME SUCH PERSONNEL ARE SPECIFICALLY SO ENGAGED PLUS REIMBURSEMENT AT COST FOR "OUT-OF-POCKET" EXPENSES.

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CITY OF LODI
WORKERS' COMPENSATION PROGRAM
AUDIT PROPOSAL



BARBARA Y. AKK & ASSOCIATES

A Management Consulting Firm

CITY OF LODI
WORKERS' COMPENSATION PROGRAM
AUDIT PROPOSAL

33 Sequoyah View Drive
Oakland, CA 94605
(415) 562-2087



BARBARA Y. AKK & ASSOCIATES

A Management Consulting Firm

December 16, 1982

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Assistant City Manager
City of Lodi
Lodi, CA

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not read.

ADDITIONAL SERVICES

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SPECIFIC REFERENCES

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CONTRACT FOR SERVICES

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We look forward to working with you on this project. We are able to begin preliminary interviews during the week of December 27th and can deliver a report by the end of January, 1983.

BARBARA Y. AKK & ASSOCIATES

Barbara Y Akk
Barbara Y. Akk, ARM
Project Manager

Gerald M. Surfus
Gerald M. Surfus
Principal Consultant

CLIENT SYMBOL CL

PREV. REV. _____

ORDER FOR SERVICES

ORDER NO. 52-2

LAST REV. _____

DATE 12/16/82

CLIENT NAME

CITY OF LODI

CLIENT NAME IN FULL

ORDER TITLE (IN FULL)

WORKERS' COMPENSATION PROGRAM AUDIT

BILLING ADDRESS

Mr. Jerry Glenn, Ass't City Manager
City of Lodi
Lodi, CA

DESCRIPTION OF SERVICES

workers' compensation program audit of ESIS and City of Lodi
as described in letter proposal dated 12/16/82

ESTIMATED COST:

TIME PERIOD: December 27th, 1982 - February 27, 1983

ACCEPTED BY:

**BARBARA Y. AKK & ASSOCIATES, a division of
YURIKO INTERNATIONAL LIMITED**

BY _____

Barbara Y. Akk
Barbara Y. Akk, President

TITLE _____

President

DATE _____

DATE 12/16/82

BILLING BASIS: APPLICABLE PER DIEM RATES (FOR NORMAL WORKDAY OF 7.5 HOURS) IN EFFECT FOR THE CLASSIFICATIONS OF PERSONNEL ENGAGED ON THE ABOVE WORK APPLIED TO THE ACTUAL TIME SUCH PERSONNEL ARE SPECIFICALLY SO ENGAGED PLUS REIMBURSEMENT AT COST FOR "OUT-OF-POCKET" EXPENSES.

Responsibility for Services:

In the performance of its services hereunder, YURIKO shall exercise the degree of skill and care required by customarily accepted good professional practice. If YURIKO fails to meet these standards, its obligation and liability to Client shall be discharged by and limited to YURIKO reperformance, at its own cost and without reimbursement, of any services which do not meet these standards.

YURIKO shall not be liable, in contract or tort or otherwise, for any special, indirect or consequential damages, including but not limited to loss of anticipated profits, loss of use, loss of revenue, cost of capital, loss of goodwill, claims of customers, or similar damages, arising out of the performance of YURIKO's services hereunder. All provisions of this Order providing for limitation of liability shall apply to the full extent permitted by law and regardless of fault.

In the course of performance of its services, YURIKO may rely upon information supplied by Client or information available from generally acceptable reputable sources without independent verification.

Delays

Neither party shall be considered in default in the performance of its obligations hereunder to the extent that the performance of such obligations is prevented or delayed by any cause beyond the reasonable control of the affected party, and the time for performance of either party hereunder shall in such event be extended for a period equal to any time lost as contemplated above.

Entire Agreement

This document contains the entire agreement between the parties as to the services rendered hereunder and supersedes all previous or contemporaneous agreements, representations, warranties, processes and conditions.

GERALD M. SURFUS
33 Sequoyah View Drive
Oakland, California 94605

Office: (415) 562-2087
Home: (415) 632-2213

EXPERIENCE/ACCOMPLISHMENTS

BARBARA Y. AKK & ASSOCIATES, Oakland, California

1981 to Present

Principal Consultant

Responsible for assisting corporate and governmental clients in administering risk management programs. Duties include developing and auditing procedures to manage specialty risks (e.g. product liability, medical malpractice and international insurance programs), and negotiating with excess insurance markets and other providers of service. Conduct educational workshops and teach the Associate in Risk Management Certification Program for the Insurance Education Association.

COUNTY OF LOS ANGELES, Los Angeles, California

Chief, Risk Management

Established a new function to identify, measure and control accidental exposure for a county with a population of 8 million, a government of 87,000 employees, and an annual budget of \$5 billion.

Administered auto, aviation, marine and general liability insurance and self-insurance programs. Solved medical malpractice exposure by establishing a self-insured program which has saved \$8 million annually since 1975. Hired staff and contract services to administer claims control and adjustment. Stabilized budget at \$7.0 million annually for over 5 years. Reorganized politically-appointed insurance committee into a multi-disciplined risk management group.

CITY OF MADISON, Madison, Wisconsin

Risk Manager

Responsible for the risk management function and cash management of over \$15 million of long- and short-term investment portfolio. Earned interest income 100% greater than previous efforts. Also coordinated city bond prospectus publishing.

Guided the development of a local government contingency plan to respond to catastrophic emergency.

UNIVERSITY OF WISCONSIN, Madison, Wisconsin

Risk Manager

PROFESSIONAL AFFILIATIONS

Risk and Insurance Management Society, Inc., since 1968

- . President, Rock River Chapter, 1973
- . President, Los Angeles Chapter, 1978
- . Board Member, San Francisco Chapter, 1981

EDUCATION

B.B.A., Risk Management, University of Wisconsin, 1967

BARBARA Y. AKK, ARM
PRINCIPAL

SCOPE OF DUTIES

Ms. Akk is responsible for inaugurating and developing risk management programs for corporate and governmental clients. Her duties include developing and auditing processes to manage casualty, property and employee benefits programs, conducting comprehensive risk analysis surveys, feasibility studies, training programs and implementing loss prevention activities.

Ms. Akk's experience includes diversified experience in risk management problems in both private and public industry, including implementation of self-insured programs, decentralized management approach for handling risk exposures, and experience in managing risk programs in the U.S., Canada, Europe and Mexico.

EXPERIENCE RECORD

Enasco Risk Management Consultants, Inc.	-Senior Consultant -Consultant
County of San Diego	-Risk Manager
The Marmor Group	-Assistant Risk Manager -Loss Control and Loss Prevention Coordinator
McGivney and Co.	-Financial Consultant

ACADEMIC BACKGROUND

Elmhurst College - Marketing
Factory Mutual - Fire Protection Course
Insurance Institute of America - Associate in Risk Management (ARM)
Northern Illinois University - Bachelor of Science in Education (BSE)
Performax - Certified Trainer
Response & Associates, Inc. - Women in Management

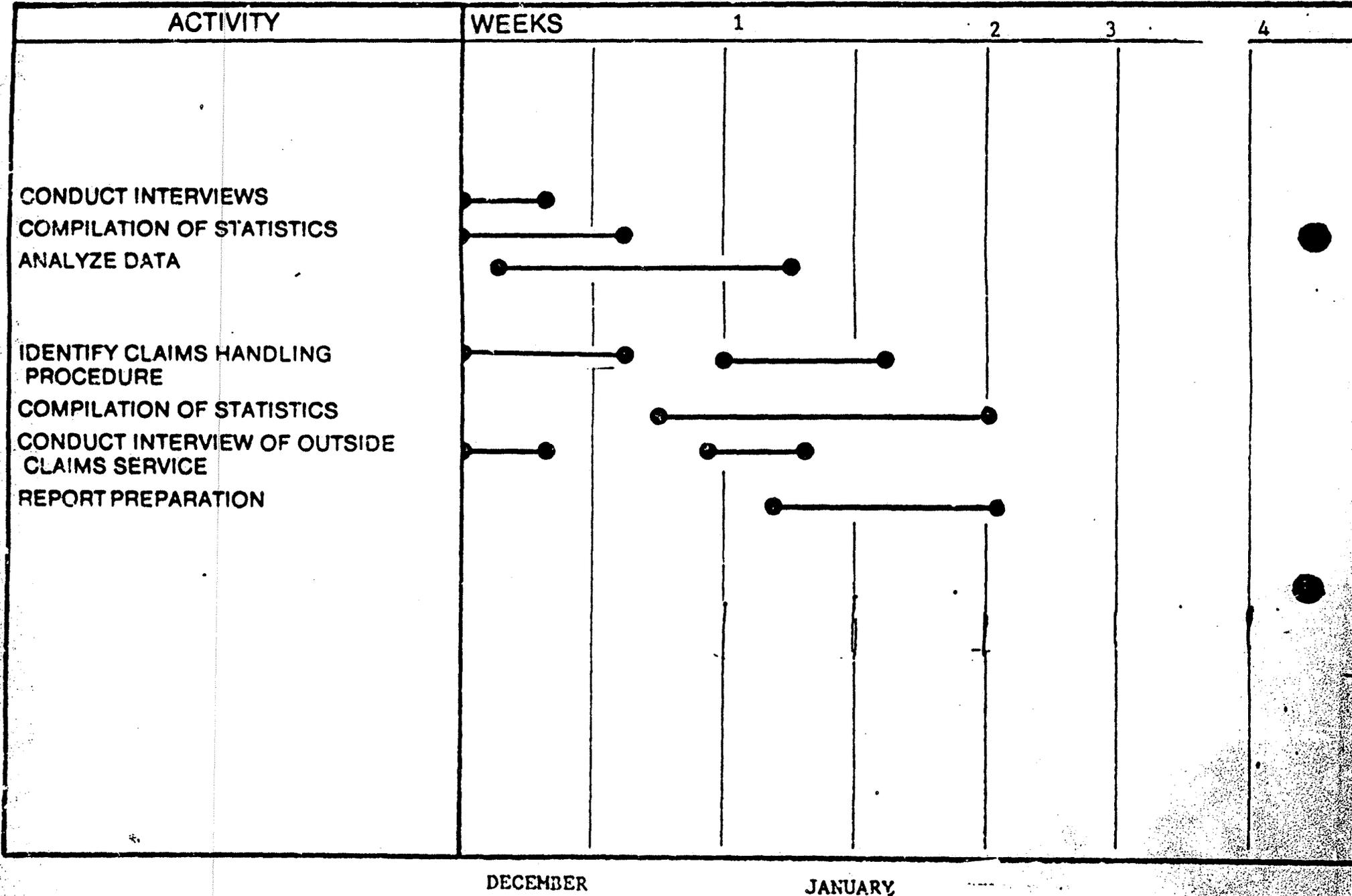
SEMINAR AND LECTURE EXPERIENCE

American Management Association - Workers' Compensation Self-Insurance Course
Leader
California Coalition For Insurance Reform for Nonprofit Agencies - Risk Management
Workshops
City of Santa Monica - Loss Prevention and Supervisory Workshop
Public Risk and Insurance Management Association (PRIMA) - National Conferences
Risk and Insurance Management Society (RIMS) - Western Region Conference
Stanford University - Balance Family and Work (Employee Seminar)
United Way of California Risk Management Workshop
University of Arizona - Governmental Risk Management Seminar

PROFESSIONAL ASSOCIATION

American Management Association
American Society for Training and Development
National Association of Security Dealers
Public Agency Risk Management Association (Past Member)
Risk and Insurance Management Society (RIMS) - Past Secretary/Treasurer

OVERVIEW OF ESTIMATED PROJECT SCHEDULE

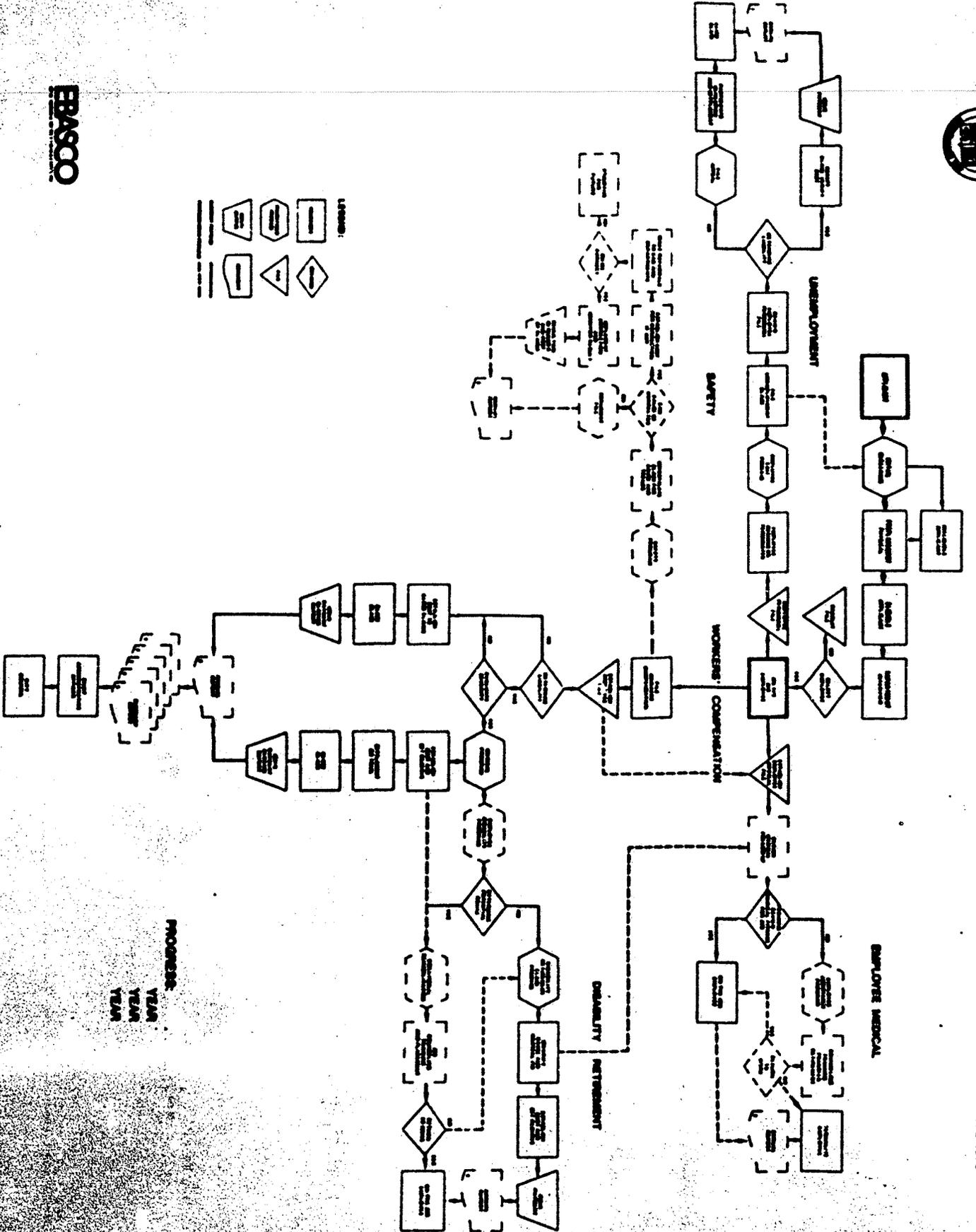


DECEMBER

JANUARY

COLEEN CITY CLAIMS MANAGEMENT FLOW CHART

APRIL 1978



EBASCO

WORKERS' COMPENSATION PROGRAM

CLAIMS REVIEW

This form is used to obtain data which will identify and record the activities of the Claims Administrator.

Name	D/I	Date Report Received	Date of Employee Contact	# Days until Contact	Date of First TD Check	Date of Acceptance/Denial of Claim	# Days until Claim Accepted/Denied

Date Reserve Estimated	Date Reserve Reviewed	# Days until Reserve Reviewed	Comments regarding Reserving Practices

Date of First Doctor's Visit	Date of Doctor's First Report	Date Doctor's First Report Rec'd	Date Follow-up Initiated	Description of Follow-up to Doctor's First Report by Claims Staff

Date of First Notice of WCAB Filing	Type of Notice Received	Date Notice of WCAB Filing Received	Date Follow-up Initiated	Date Employer Notified	Description of Follow-up to Receipt of WCAB Filing

OTHER COMMENTS:

1. Medical bills waited prior to payment?

2. General response time to attorney requests?

WORKERS' COMPENSATION WORKSHEET

Claimant _____ Claim Date _____

Injury _____

Part of Body, _____

MEDICAL CONTROL:

Date of Treatment _____ Facility _____

Time of day of treatment _____ Treater- _____

Assigned to Physician _____ Referred _____

Medical Reports: Documented _____ Timely _____

Quality of Treatment:

Use of Medical Consultants

Prior Medical History

Prior Medical Records

Prescribe treatment:

Approximate cost for treatment

Alternative treatment and cost:

COMMENTS:

SERVICES PROVIDED

Performance reports: Design, compile, edit and work with staff to produce an annual performance report.

Retention programs: Analyze insured and self-insured programs.

Organization & development: Assist in selection of personnel. Develop training programs and integrate risk management activities.

Goals/objectives: Target for results, assist in writing program, policy and procedures.

Risk management programs: Organize, develop and implement risk management programs for public and private organizations.

Administration audits: Of claims, safety, risk management programs.

Management training programs: In-house training programs for staff and employees in areas related to supervisory safety, claims and risk identification, financing and management.

Barbara Y. Akk & Associates uses a **PROGRAM** approach to all projects. We are an independent management consulting firm. This firm is not a broker or vendor of claims, safety or engineering services. Compensation is provided as a fee for services.

We are dedicated to producing results through better management of all resources.

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