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Property Damage

Billing & Collection

Process Document

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INTRODUCTION

Objective

This document outlines the process for establishing and recovering a claim against a responsible party for causing damage to Eversource property.

Applicability

This process is applicable to all situations where our electrical system is damaged. The facilities can be below, on, or above ground.

References

This process is kept in the Property Damage Project/Process Documentation/Active Version/ Sharepoint site.

Discussion

This document was written to outline the overall process to be followed when pursuing a property damage claim starting with responding to an incident and finishing with recovering the company's costs to repair the damaged facilities back to normal configuration.

At the time of the incident, the company will always take the needed steps to make the situation safe and restore power. In some cases, additional "follow-up" work may need to be planned, scheduled and constructed to bring the system back to normal configuration.

Example

A vehicle hits and cracks a pole in the middle of the night. Power has not been loss. The pole is braced at the time of the incident. The replacement of the pole and transfer of facilities will be planned subsequently.

When the bill is submitted to Oracle as a receivable, it will also be reimbursed to the operational cost control center. The reimbursement is not contingent on the collection of the claim.

The two criterion to create a bill in the Work Management Billing System are (1) the work orders must be in the status of COMP or PCLOSE; and (2) the work type must be EM, CM, or CP.

The criteria to include a work order in the dashboard data simply requires at least one of the property damage specific prerequisites. Designers are currently instructed to use the property damage sub-work types, but on occasion and historically, Designers used other sub-work types.

The property damage prerequisites are used to manage the process from incident to billing the responsible party. It relies on the proper disposition of the prerequisites in the work management system at the appropriate time to process efficiently.

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Standard Prerequisites Number	Description	Type	Activation Status	Completion Status	Completed When	Completed By	Part of Report Criteria
PRE223	Work by Telephone Co.	JOINTUSE	DSINPRG	WTBS	Pole installed.	Operations	No
PRE237	PDB Police Report Contact & Damage Claim	DAMINV	DSINPRG	COMP	Police report ordered in Lexis Nexis portal.	Admin	Yes
PRE238	PDB Summary Report Package Complete	DAMINV	FCOMP	COMP	Bill generated and documentation attached.	Admin	Yes
PRE239	PDB Reviewed for Release to MX	DAMINV	FCOMP	COMP	Documentation and bill approved accurate and complete.	Admin	Yes
PRE240	PDB Claims Review/Send to Oracle	DAMINV	FCOMP	COMP	Bill sent to Oracle as a receivable.	Claims	Yes
PRE245	Variance Reconciliation	COMPCLOSE	FCOMP	FCOMP	Material variance is resolved.	Operations	No
PRE677	Need Invoiced	BILLING	FCOMP	COMP	All invoices attached and highlighted	Admin	Yes
PRE678	Police Report Received	BILLING	DSINPRG	COMP	Police report provided by Lexis Nexis and attached.	Admin	No
PRE689	Dig Up Docs Attached	BILLING	DSINPRG	COMP	Dig up documentation provided and attached.	Admin	Yes

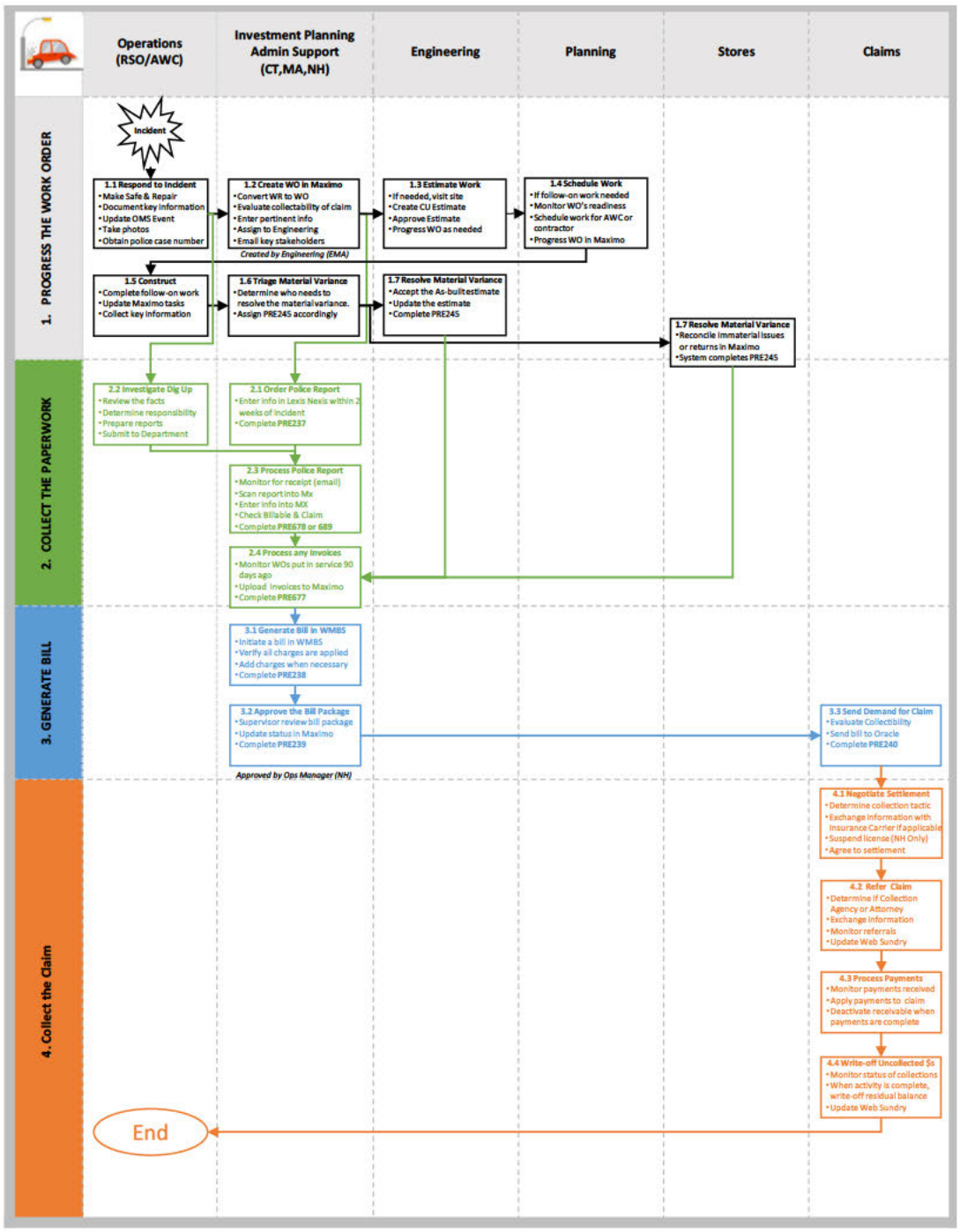
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High Level Electric Process Flow

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Instructions

The following instructions are aligned to the high-level process flow and are meant to provide detailed activities performed during the process steps. The level of detail assumes that a user is familiar with the navigation and functionality of the various applications, including Maximo Work Order and Invoices, Work Management Billing System (WMBS), Lexis Nexis Portal and Web Sundry.

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1. PROGRESS THE WORK ORDER

1.1 Respond to the incident.

Operations

Reference
Supervisor's Briefing Sheet SBS-14-008 revision 3 outlines first responder's responsibilities related to property damage incidents.

1.1.1 EVALUATE the situation and MAKE it safe.

1.1.2 When the incident is an underground dig up, DISPATCH the investigator to the scene.

1.1.3 DOCUMENT any information about the person/company responsible (i.e. City Garbage Truck took down service, City Plow knocked pad off of slab, ABC Construction dug up primary, Tree Company took down secondary)

1.1.4 TAKE photos of the scene to help clarify and support responsibility.

Example
Vehicle license plate, Company name/logo on vehicle or equipment, point of contact in relation to mark outs, etc.

1.1.5 FILL OUT a Trouble Ticket (electronically or paper) noting the following information:

- Street and Town
- Structure # (i.e. pole)
- Description of Work Completed
- Note if "Follow-Up Work" is Needed
- Materials Used
- Contractors Used or Copy of Timesheets (Check-off Box for Traffic Control)
- List all Eversource Employees On-Scene
- Police case number
- License Plate or VIN#

NOTE
The more information obtained and provided either from the scene of the accident or from the follow-up work, the quicker the property damage bills can be processed and the quicker the company can recover their costs, which results in a operational budget reimbursement.

1.1.6 When the incident is underground, RECORD the Dig Safe Ticket number on the trouble ticket.

1.1.7 While police are on scene, OBTAIN the summary report, police traffic duty slip, and police case number on the trouble ticket.

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Administrative (CT, WMA, NH) and [redacted]

1.2 Create the work order in Maximo

1.2.1 NAVIGATE to the Maximo portlet for work requests

1.2.2 CONVERT work request to a work order.

1.2.3 EVALUATE criterion of Cancellation Matrix (Attachment 1) in the Work Order Creation section and PERFORM actions outlined if appropriate.

1.2.4 CHECK "Responsible Party Unknown?" on the Billing Tab in Maximo and then SAVE, if appropriate.

[redacted]

NOTE

Attachment 4 - State Requirements to Notice Municipals Regarding Claim describes the requirements:

- Connecticut requires notice within 6 months and action within 2 years of incident.
- [redacted]

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- [redacted]

Claims

1.2.7 PLACE the Agency on written notice of the claim within the state's required timeframe using the department's form letter.

1.2.8 UPDATE Maximo damage notes when Notice of Claim is sent and acknowledged.

1.2.9 ATTACH Notice of Claim and Agency Acknowledgement to Maximo work order tab.

Administrative (CT, WMA, NH) and [redacted]

1.2.10 If the work order is labor only, ADVANCE the work order to COMP in Maximo.

[redacted]

Planner

1.4 Schedule the follow-up work to be completed.

1.4.1 MONITOR the work order's readiness to be scheduled.

1.4.2 SCHEDULE the work for the Area Work Center (AWC) personnel or Outside Contractors.

1.4.3 PROGRESS work order in Maximo, as appropriate.

Operations

1.5 Construct the Facilities

1.5.1 GATHER and RECORD with material to perform the repair.

1.5.2 COMPLETE the permanent repair in the field.

1.5.3 UPDATE the Maximo task statuses.

1.5.4 DOCUMENT key information including if work was built as designed.

Admin

1.6 Triage the material variance when the system creates a prerequisite 245.

1.6.1 DETERMINE who needs to resolve the material variance.

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NOTE
Quantity Planned is the Material the Designers Planned for the job. **Net Issues** is what the Storeroom issued to job. **Quantity As-built** is the material that was used for the job. **Quantity Variance** is the difference between the Net Issues and Quantity As-built.

a. When all planned quantities are 0 (zero), REASSIGN the PRE245 to Field Engineering to update the asbuilt estimate to align with what was issued to the field.

b. When all as-built quantities are 0 (zero), REASSIGN the PRE245 to Field Engineering to perform as-built acceptance.

c. When planned quantities and net issues match, but as-built quantities do not, REASSIGN to Field Engineering to perform as-built acceptance.

d. When planned quantity and as-built quantity match, but net issues do not, REASSIGN the PRE245 to the Storeroom to charge out material.

e. When more than 1 condition exists, SEND to Field Engineering first.

1.6.2 REASSIGN the PRE245 to the appropriate party in Maximo in CT, WMA & NH.

1.6.3 EMAIL the appropriate party in EMA.

Operations

1.7 Resolve the Material Variance.

NOTE
The steps below are not sequential.

Admin or Designer

1.7.1 PERFORM as-built acceptance.

Designer

1.7.2 REWRITE the asbuilt estimate to align with material used in the field.

STORES

1.7.3 ADJUST the net issues or returns to align with the estimate and material used in the field

Admin, Designer, or System

1.7.4 COMPLETE the PRE245 in Maximo.

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2. COLLECT THE PAPERWORK NEEDED TO SUPPORT THE CLAIM

NOTE
These steps do not occur sequentially after progressing the work order but will happen in parallel at the appropriate point.

Admin

2.1 Order the police report within 2 weeks after creating the work order, when appropriate.

2.1.1 SUBMIT request for police report in the Lexis Nexis portal, by entering the following information:

a. Agency Name

b. Date of Loss (DOL)

c. Claim # - begin with the Maximo work order followed by a hyphen then any characters can be added subsequently to help identify the claim (FWO, AWC, etc).

d. Police Case Number under report, if provided

e. Eversource as Last Name of Party 1

f. Address in Street of Loss

g. City and State

h. Vehicle Identification Number (VIN), if provided

i. Vehicle License Plate (Tag), if provided.

j. General Description under Additional Info

2.1.2 COMPLETE PRE237 in Maximo

Designated Investigator

2.2 Investigate the dig up when appropriate.

2.2.1 COORDINATE with the Utility Locator investigation, when applicable.

2.2.2 REVIEW all the relevant facts for accuracy.

2.2.3 DETERMINE the responsible party of the incident.

2.2.4 SUBMIT required documentation to the regulatory agency.

2.2.5 RETAIN the reports and supporting documentation per retention guidelines.

Admin

2.3 Process the police or damage report.

2.3.1 FOLLOW the Actions outlined in the Lexis Nexis Response Actions attachment to guide next steps.

2.3.2 EVALUATE criterion of Cancellation Matrix (Attachment 1) in the *Police Report or Dig Up Documentation Resolution* section and PERFORM actions outlined if appropriate.

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2.3.3 If claim is still viable, CHECK both the "Billable?" Box and "Claim?" box in the Billing Tab in Maximo.

2.3.4 CHECK "Responsible Party Unknown?" on the Billing Tab in Maximo, if appropriate.

2.3.5 EXPORT the police report from the Lexis Nexis portal and ATTACH it to the work order in Maximo.

2.3.6 VALIDATE the Incident Date is accurate in the Damage Claims section of the Billing Tab. It will drive the Billing Deadline and Statute of Limitations.

2.3.7 FILL-OUT any other pertinent information available in the Damage Claims section of the Billing Tab.

2.3.8 SAVE your updates to the Billing Tab in Maximo.

2.3.9 VALIDATE or CHECK "Fatality?" on the Billing Tab in Maximo, if appropriate.

a. EMAIL pdclaims@eversource.com the work order to notify of fatality.

Claims

b. REVIEW the attached police report to the work order.

c. CONTACT the insurance company for the claim information.

d. CREATE a contact type of "Insurance" with the highlighted information shown below.



e. If no insurance is listed on the police report, DETERMINE if appropriate and who to bill.

f. CREATE a contact to reflect who should be billed, if appropriate.

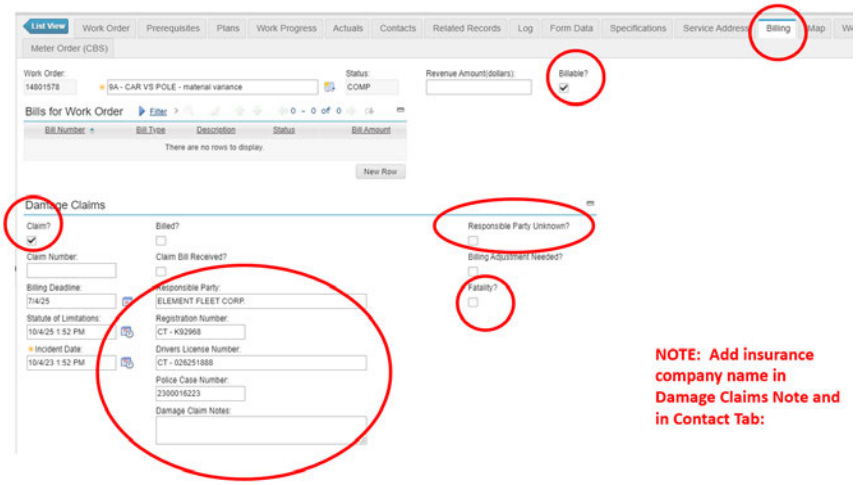
g. ADVISE Admin of determination.

Admin

h. PROCEED with billing or cancellation as appropriate.

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2.3.10 NAVIGATE to the Contacts Tab in Maximo and ADD contacts.

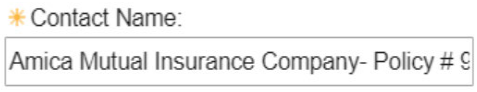
a. CLICK on New Row button all the way to the right in the External Contacts section.

b. ENTER required fields for a Contact Type of Vehicle Owner in the Details section that pops up.

c. SAVE the contact you added.

d. REPEAT steps a - c for a Contact Type of Operator, even if the same asVehicle Owner.

e. REPEAT steps a – c for a Contact Type of Insurance using the Insurance Company Name and Policy Number as the contact name.



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NOTE
All External Contacts must be entered before you Calculate & Save the bill in WMBS even if the information is the same.

2.3.11 COMPLETE or CANCEL PRE678 (police report) or PRE689 (damage report) as guided in Lexis Nexis Response Actions or Cancellation Matrix.

Admin

2.4 Attach invoices to the work order within 90 to 120 days after going in service.

2.4.1 MONITOR for work orders that have been in service for 90 days.

2.4.2 REVIEW that work order is written and all charges have hit the work order (labor, outside services, materials, overheads and loaders).

a. NAVIGATE to the Actuals Tab

b. VALIDATE time has been charged on the Labor sub-tab.

c. VALIDATE no materials are checked as Out of Balance on the Material Variance sub-tab and there is no active PRE245.

d. VALIDATE outside services have been charged on the Services sub-tab.

NOTE
You must wait until Day 2 of the monthly close of the latest charge to ensure all overheads and loaders have been applied.

2.4.3 DETERMINE if contractor charges hit Outside Service.

a. GOTO CU Estimating (T&D) – Electric by clicking on the chevron next to Estimate Request on the Actuals Tab



b. NAVIGATE to the Summary Tab.

c. OBSERVE if contractor was added to the work order.

2.4.4 When work order contains contractor costs, LOCATE the contractor invoices in Maximo.

a. NAVIGATE to the Invoice Module in Maximo.

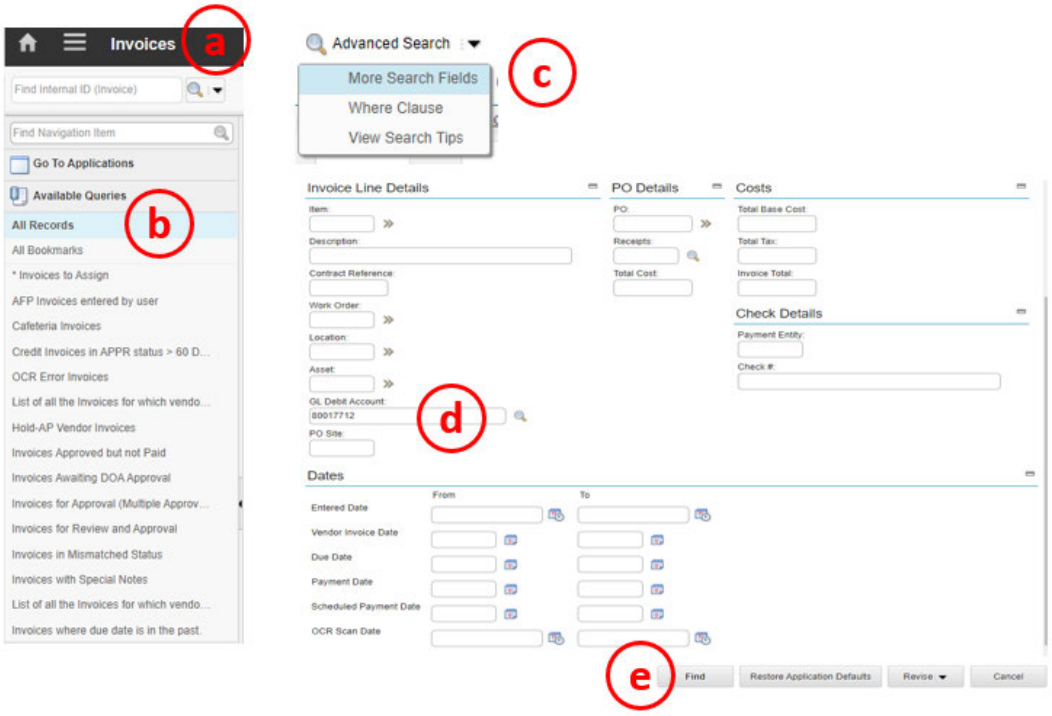
b. CLICK All Records.

c. CLICK Advance Search and then CLICK More Search Fields.

d. ENTER Maximo FWO in GL Debit Account.

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e. CLICK Find.



NOTE
Entity, CCC, and Cost Element are not required for the search. All invoices associated with the work order will populate.

2.4.5 EXPORT and HIGHLIGHT all applicable contractor charges to the work order.

2.4.6 ATTACH all marked up documents to the work order in Maximo.

2.4.7 COMPLETE PRE677.

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3. GENERATE A BILL TO SUMMARIZE THE COSTS OF THE CLAIM

NOTE
Both Steps 1 and 2 must be complete before generating the bill in WMBS.

Admin

3.1 Create bill in the Work Management Billing System (WMBS) within 2 weeks.

- all prerequisites are done, meaning a status of blank, COMP, CAN, & CLOSE;
- work order was placed in service more than 90 days ago;
- work order status is COMP or PCLOSE; and
- work order does not meet any cancellation criterion.

NOTE
Supervisor should review with the Claims Manager any large claim (> $10,000) with clear responsibility and insurance past the Billing Deadline but at least 30 days before Statute of Limitations before cancelling claim. The Billing Deadline is 90 days before the Statute of Limitations)

3.1.1 INITIATE or UPDATE a bill to support a property damage claim.

a. NAVIGATE to the Work Management Billing System (WMBS) http://wms.nu.com/apps/wmbs/.

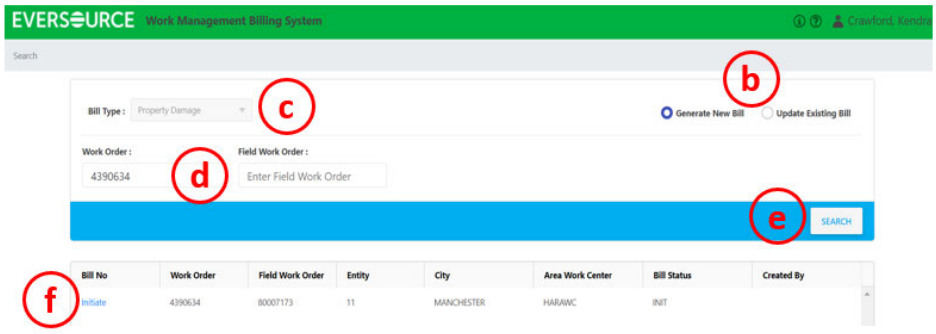
b. CLICK Update Existing Bill if you already started a bill; otherwise Generate New Bill will already be highlighted.

c. SELECT Property Damage for the Bill Type, if not preselected.

d. ENTER the Work Order and Field Work Order

e. CLICK SEARCH.

f. CLICK Initiate to generate a bill. The WMBS status will be INIT.



3.1.2 VERIFY the Work Order Details and CONTACT match Maximo information.

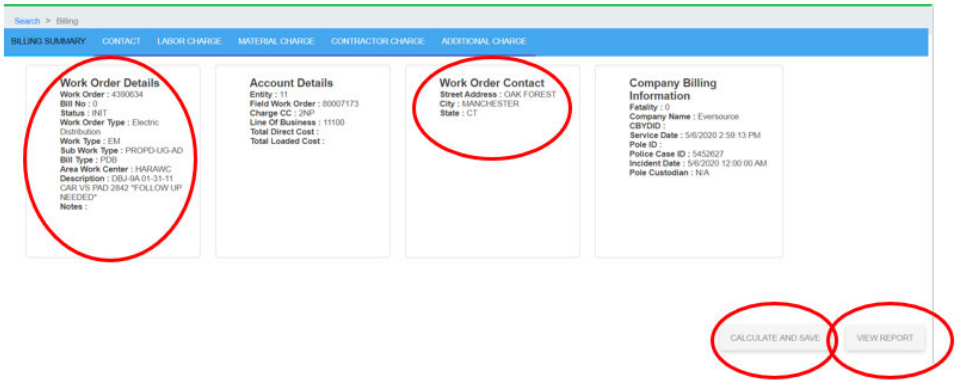
a. OPEN the Maximo Work Order Tab in a second window.

b. COMPARE information in Work Order details with Work Order Tab in Maximo.

c. CONFIRM Description says 9A-Car vs Pole or 9A-Dig-up.

3.1.3 CALCULATE and SAVE the bill in WMBS after you made all adjustments to the Actuals from the Labor Charge tab. The WMBS status will change to INPRG.

3.1.4 CLICK on View Report to see the results of the bill calculation.



3.1.5 VALIDATE all direct charges have been applied to the work order.

a. CONFIRM appropriate Transformer charges are present.

b. REFER to Appendix to compare the Hyperion Detail of Charges query results with WMBS report, when needed. Hyperion Detail of Charges reflects charges posted to Power Plan.

NOTE

The rows that are displayed in the Labor Charge and Material Charge tabs of WMBS are actuals. The system does not allow users to adjust those rows. You must add a manual row. You are allowed to edit a manual row that you added.

3.1.6 DELETE charges in WMBS, if not appropriate.

- Design Contractor Invoices

3.1.7 ADD or ADJUST manual charges in WMBS, if needed.

a. NAVIGATE to the Bill Summary page in WMBS.

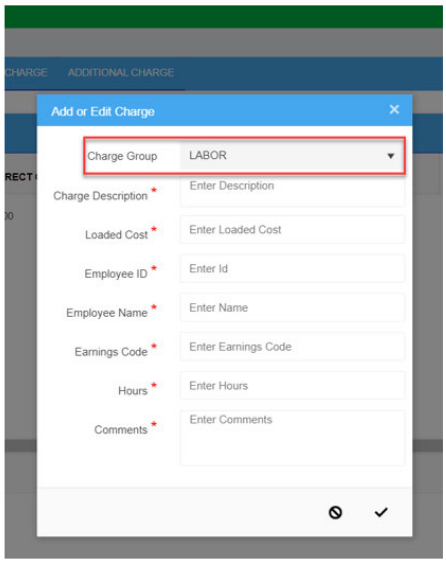
b. SELECT New Charge button on the appropriate charge tab.

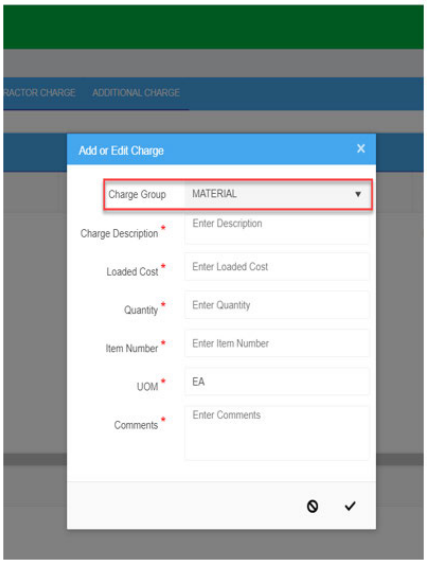
c. ENTER the requested information.

d. SAVE your edits by clicking the check mark.

e. CLICK the pencil to edit the charge.

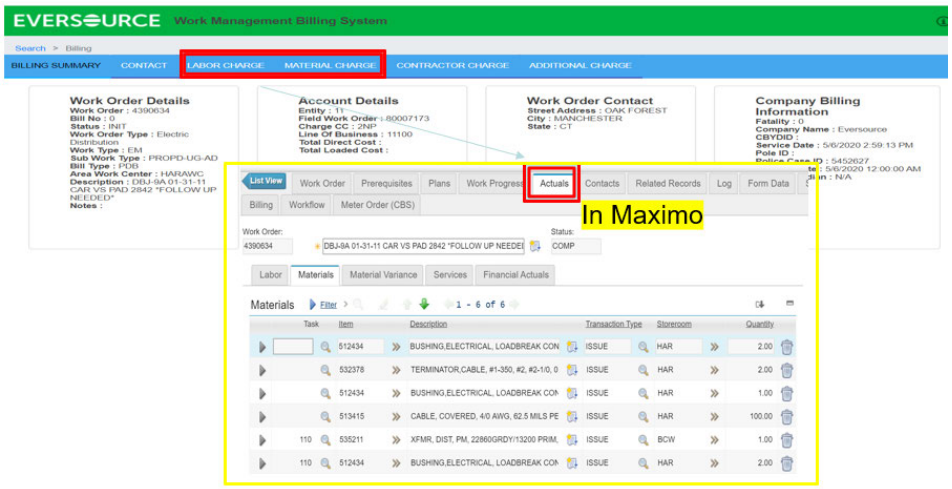
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f. CALCULATE and SAVE the changes.

g. VALIDATE entered charges are correctly reflected.



3.1.8 ATTACH page 3 of the WMBS bill report to the work order in Maximo.

3.1.9 CONFIRM property damage claim is still viable and all supporting documents have been attached to work order in Maximo to create an electronic bill package.

- Trouble Ticket (CT, WMA & NH) or Keep Cost Report (EMA)
- Pictures
- Police Report or Dig Up Documentation
- WMBS Billing Report (page 3)

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NOTE
When the standard Police Report or Dig up Documentation are not available, any documentation from a third party that identifies the responsible party, date of the incident, location, insurance, and description of the incident can be substituted.

NOTE
Although Timesheets will not be required as part of the package initially, Claims may request them if needed in the future. The Material Summary and Hyperion Detail of Charges have been removed from the package intentionally.

3.1.10 [redacted]

3.1.11 RELEASE TO MAXIMO by clicking the button at bottom right of Billing Summary page in WMBS. The WMBS status will change to COMPL

3.1.12 COMPLETE PRE238

3.2 Approve the bill package is appropriate, complete and accurate within 2 weeks.

Admin Supervisor (CT & MA)

3.2.1 PULL UP the work order in both WMBS and Maximo .

a. NAVIGATE to Bill Summary page in the Work Management Billing System (WMBS) http://wms.nu.com/apps/wmbs/.

b. CLICK the View Report button on the bottom right side of the page.

Admin Supervisor (CT & MA), Ops Manager (NH)

3.2.2 VALIDATE claim is still viable.

3.2.3 EVALUATE criterion of Cancellation Matrix (Attachment 1) in the *Prio to Finalizing the Bill* section and PERFORM actions outlined if appropriate.

3.2.4 COMPLETE the following steps when claim is not viable.

a. EVALUATE criterion of Cancellation Matrix (Attachment 1) in the *Work Order Creation* section and PERFORM actions outlined as appropriate.

b. CANCEL the bill in Maximo and WMBS outlined in step 3.4.

c. CANCEL all remaining Property Damage specific prerequisites.

3.2.5 VERIFY the charges are accurate and complete.

3.2.6 COMPARE the WMBS billing report to Bill Line Details in the Billing Tab in Maximo.

3.2.7 VERIFY the supporting documentation referenced in step 3.1.9 is complete and attached to the work order .

3.2.8 RESOLVE any discrepancies found.

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Admin Supervisor (CT & MA), Admin (NH)

3.2.9 COMPLETE the PRE239.

3.2.10 In CT & MA, EMAIL Claims the bill is ready.

NOTE
As of the writing of this process, the Maximo portlet for Claims is not functioning properly. The email is needed to ensure no claims are missed. The dashboard correctly tracks all claims updated in the Maximo.

Claims

3.3 Send bill from Maximo to Oracle to record the receivable.

3.3.1 VALIDATE the bill package is complete, accurate, and viable.

a. EVALUATE criterion of Cancellation Matrix (Attachment 1) in the *Claims Review of Package* section and PERFORM actions outlined if appropriate.

b. CONFIRM the actual bill in Maximo aligns with the supporting documentation of package.

c. ENSURE the police or damage report clearly identify the responsible party being billed.

d. Verify that all invoices are included and link to charges on the bill.

e. REVIEW Trouble tickets information is aligned with supporting information.

3.3.2 WORK with bill preparer to resolve any minor quick (within 1 business day) fixes needed.

3.3.3 RETURN to bill preparer for larger fixes that will likely take more than a day.

a. EMAIL bill preparer and COPY supervisor describing the discrepancy and action needed.

b. ADD new PRE239 to work order in Maximo.

3.3.4 SELECT the correct contact by expanding the bill under Bills for Work Order section of the Maximo Billing Tab.

NOTE
There are currently two instances of Oracle. The instance used by CT, [redacted] is automated between Oracle and Maximo. [redacted].

3.3.5 For CT [redacted] CLICK the Send to Oracle button in the expanded section [redacted]

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[redacted]

3.3.7 COMPLETE PRE240.

3.3.8 For CT, WMA, or NH, VALIDATE the Oracle Customer Number populated 2 business days after sending.

[redacted]

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3.4 Delete or Cancel Maximo bill or line items or WMBS bill.

NOTE

The steps needed to delete or cancel a bill or bill lines are determined based on the status of the of the bill in WMBS and Maximo. The following table outlines the actions needed. Where there are Maximo and WMBS steps, Maximo actions must be completed first.

WMBS Status	Maximo Bill Status	What's happening?	Action in Maximo (Must be done first)	Action in WMBS
INIT	NA	WMBS pulled Bill Summary header information from Maximo	None	• Cancel Bill • Or to Update Bill - Reinitiate a new bill
INPRG	NA	WMBS pulled charge details from PowerPlan and created billing report	None	• CANCEL Bill • Or to Update Bill - CALCULATE and SAVE
COMPLT	INIT	WMBS released the summary bill details and Maximo created bill and bill lines	• Delete Bill or bill lines	• Make bill UNBILLABLE • CANCEL Bill • Or to Update Bill – Reinitiate and CALCULATE and SAVE
	SENT	Maximo sent bill lines to Oracle and updated status. Oracle returned the Oracle Customer Number tied to receivable	• Cancel Bill	• Make bill UNBILLABLE • CANCEL Bill • Or to Update Bill – Reinitiate a new bill • Inform Claims and Sundry Billing
	MANUAL	Maximo changed status to recognize bill manually sent to Oracle. Bill lines emailed to Sundry Billing, who returns Custom Number tied to receivable.		
	PAID	Oracle updated the status in Maximo to reflect the receivable was paid in full.	Bill cannot be deleted or cancelled	• Bill cannot be deleted or cancelled

3.4.1 Delete a Maximo bill or bill lines in INIT status.

a. NAVIGATE to Billing Tab in Maximo.

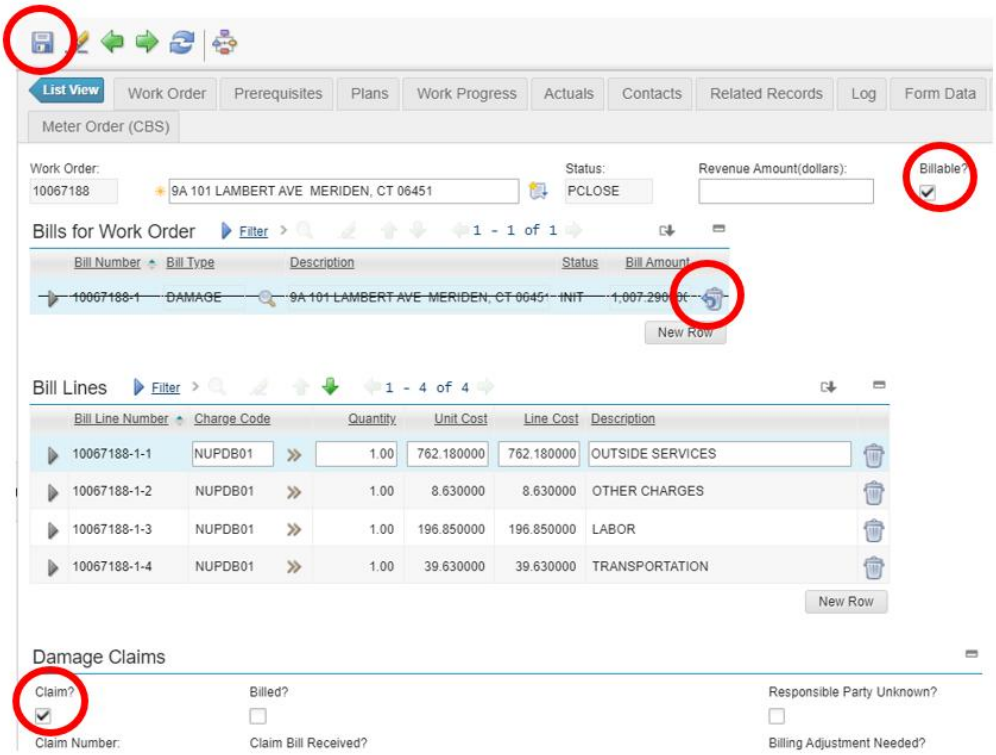
b. CLICK the trash barrel to the right of the bill in the Bills for Work Order section. All billing lines will be deleted once saved.

c. If no longer billable, UNCHECK Billable and Claim? and ADD reason code from the Cancellation Matrix in the Damage Claim Notes.

d. CLICK the disk in top left corner to save the changes.

e. CANCEL all remaining property damage prerequisites.

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3.4.2 CANCEL a Maximo bill in SENT or Manual status.

a. NAVIGATE to Billing Tab in Maximo.

b. CLICK on the Cancel button after expanding the bill line.

c. If no longer billable, UNCHECK Billable and Claim? and ADD reason code from the Cancellation Matrix in the Damage Claim Notes.

d. CLICK the disk in top left corner to save the changes.

e. CANCEL all remaining property damage prerequisites.

f. INFORM AcctSundryBilling AcctSundryBilling@eversource.com the bill is being canceled and the receivable should be reversed.

3.4.3 Cancel a WMBS bill in INIT or INPRG status.

a. NAVIGATE to the Bill Summary in WMBS.

b. CLICK the CANCEL BILL button in the bottom right hand corner.

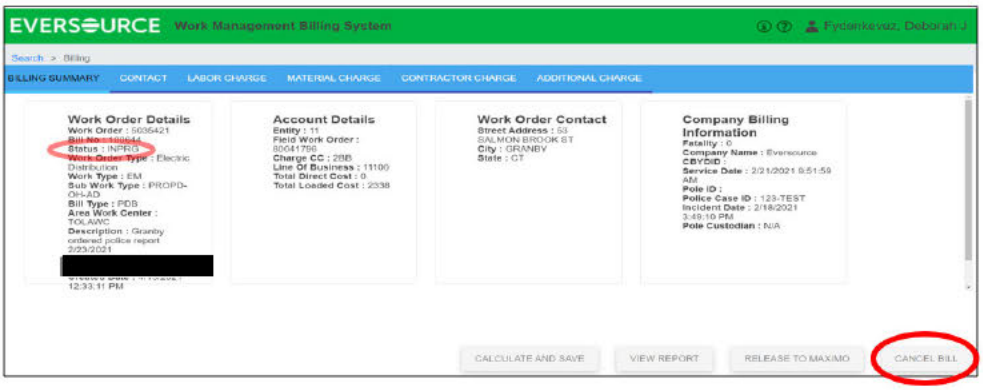
c. SELECT a cancel reason in the pop-up window.

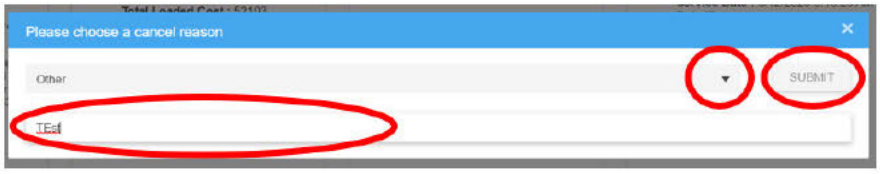
d. ENTER a descriptive reason if other is selected.

e. SUBMIT cancel reason.

f. If needed, REINITIATE a new bill and GOTO step 3.1.

REDACTED





3.4.4 Cancel a WMBS bill in COMPLT status.

a. DELETE Maximo bill and GOTO step 3.4 based on the Maximo bill status.

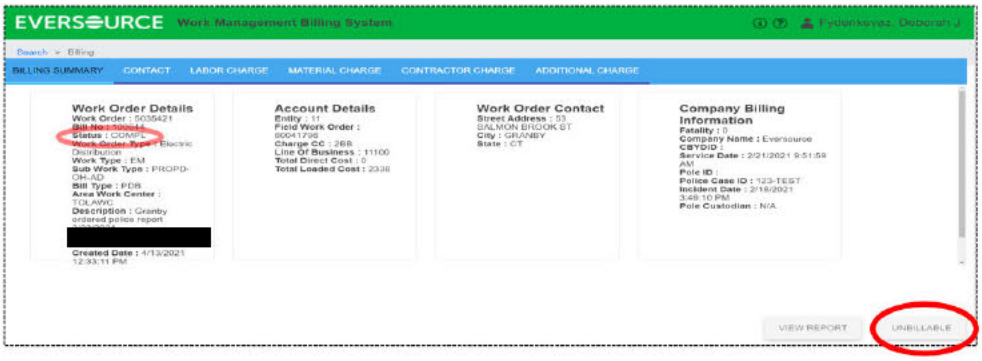
b. NAVIGATE to the Bill Summary in WMBS.

c. CLICK the UNBILLABLE button in the bottom right hand corner.

d. SELECT a cancel reason in the pop-up window.

e. ENTER a descriptive reason if other is selected.

f. SUBMIT cancel reason.



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4. COLLECT THE RECEIVABLE FROM THE RESPONSIBLE PARTY

Claims

NOTE

The negotiation is an iterative process with the insurance company or responsible party. Each communication, agreement and action should be noted in Web Sundry, as well as adding a reminder for future actions.

4.1 Negotiate a settlement with the responsible party.

4.1.1 CONTACT insurance company and/or responsible party to make them aware of the claim and exchange information.

4.1.2 ENTER the receivable pertinent data and documentation in Web Sundry.

a. FILL IN the Account section with the OAR Number, Entity, Name, Address, and Incident Date.

b. DETERMINE the Credit Status based on the initial collection tactic by following the decision process (Attachment 3).

c. FILL IN the Summary section with the Credit Status, Original Bill Date, Original Bill Amount in.

d. FILL IN the Damage Information section with Location, Event Date and Work Request # (aka Maximo Work Order Number)

e. FILL IN the Insurance Company section, Insurance Claim #, Adjuster Name, Phone Numbers, and Email Addresses in the Insurance Information Section.

f. ATTACH the aggregated billing documentation (BD) into a single file using the following naming convention "Work Order Number-INT-BD".

g. GENERATE letter if appropriate,

Letter	Purpose
14 Day Final Notice	This letter is utilized after the negligent party fails to respond to our "First Letter Request for Insurance information.
Arrangement with Promissory	This is a contract document with the negligent party agreeing to make monthly payments to resolve the legal debt.
Broken Payment Arrangement	This letter is utilized to communicate to the negligent party that they have failed honor the "Arrangement with Promissory" contract and our now delinquent. Subsequently, it advises them we will resume collection action.
Collection Agency	This letter is utilized when all attempts by an Eversource claims analyst to recover from the negligent party have failed. We now advise them that this matter will be pursued by our collection agency.
Conditional Release of License Cover Letter	This letter is utilized as a contract with the negligent party agreeing to payment installments to collect the legal debt. In exchange the negligent party's license will be restored by the DMV.

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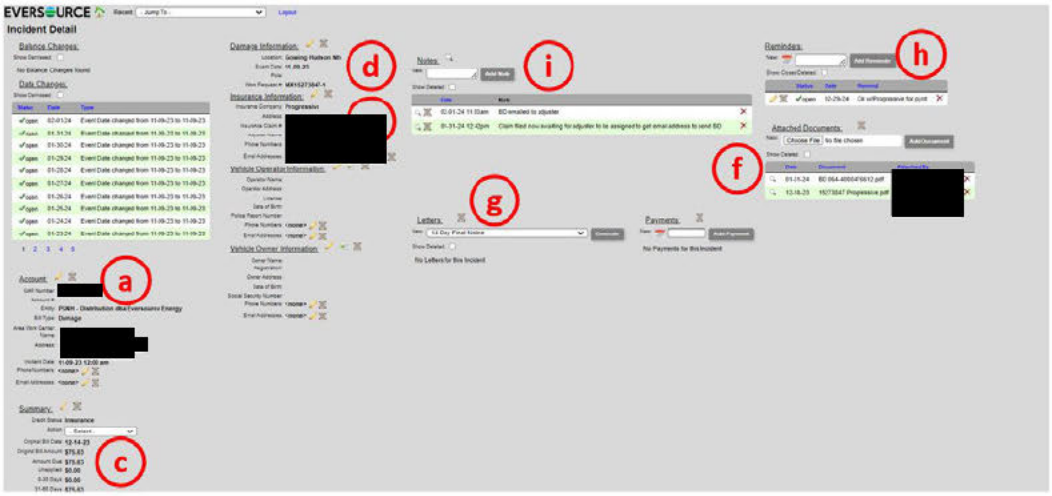
Customer Notification of Possible License Suspension	This letter is utilized to advise the negligent party that their failure to respond to this legal debt will now result in our request to the jurisdictional DMV for license suspension.
Dig Up Letter	This letter is utilized as first notice to the negligent excavator to respond to Eversource's request for insurance information relevant to the occurrence.
First Letter Request for Insurance Information	This letter is utilized to place a negligent party that damaged our above ground facilities on notice and request insurance information.
Halt Revocation	Notice to jurisdictional state DMV to cease the process of revoking the negligent party's driver's license.
Notice to City	Notice of claim sent to Municipality of intent to pursue a negligence claim.
Paid in Full (DMV Release)	This letter is used to communicate to the jurisdictional DMV that the negligent party has satisfied its legal debt and their driver's license can be restored.
Request Revocation Broken Arrangement	This letter is utilized to communicate to the jurisdictional DMV and request a license suspension of the negligent party.
Second Letter	This letter is the second request for insurance information from the negligent party which damaged our above ground facilities.

[redacted]

h. ADD a Reminder when appropriate.

- Municipal Notice Deadline
- [redacted]
- Payment Expected
- Follow-up after GL Team
- Placing claim into collections
- Write-offs

i. ADD note to reflect update.



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4.1.3 CONFIRM the insurance company and/or responsible party accepts responsibility.

4.1.4 ADDRESS any questions or challenges regarding responsibility or demand amount.

4.1.5 FINALIZE settlement, demand amount and payment terms.

4.1.6 RECORD transactions and payment terms in Web Sundry.

4.1.7 INPUT a reminder in Web Sundry.

4.1.8 ADD note to reflect update.

4.1.9 DECIDE next step if a reasonable settlement is NOT reached or communications break down.

Claims

4.2 Refer claim as outlined in Attachment 3-Collection Tactic Decision Process.

4.2.1 [redacted]

4.2.2 In CT and MA, FOLLOW the following steps.

a. WRITE-OFF any claim less than $500.

b. FORWARD claim to a collection agency when value is between $500 and $10,000.

1) MONITOR status of collection referrals.

2) REVIEW to see if there is still activity.

3) WRITEOFF any collections where there has been no activity or communication for 6 months

4.2.3 For all states, RETAIN attorney (internal or external) for claims greater than $10,000 with preference to internal versus external counsel.

a. MONITOR status of attorney referrals.

b. ANSWER interrogatories associated with the case.

c. CONFER with attorneys regarding any settlement offers.

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d. FINALIZE settlement with responsible party and court.

e. UPDATE and STATUS Web Sundry throughout the course of litigation.

4.2.4 UPDATE and NOTE Web Sundry claim status.

4.2.5 PROVIDE Collection Agency or Attorney all the supporting documentation for the claim.

4.2.6 DEACTIVATE Oracle monthly billing of receivable.

Claims

4.3 Process payments made against claims.

4.3.1 MONITOR payments made.

4.3.2 IDENTIFY account payment is associated.

4.3.3 UPDATE Web Sundry of payment.

4.3.4 When all payments are complete, CLOSE the receivable.

a. DEACTIVATE Oracle monthly billing of receivable.

b. ENTER completion status in Web Sundry as outlined in Attachment 3.

c. WRITEOFF any residual balance.

Claims

4.4 Write-off uncollectible portion of claim.

4.4.1 PROVIDE list of any writeoffs from claims by the ## of the month.

4.4.2 PROVIDE writeoff balance to AcctSundryBilling AcctSundryBilling@eversource.com.

4.4.3 UPDATE status in Web Sundry.

4.4.4 [redacted]

---------- End of Instruction ----------

Summary of changes

July 2024 Published

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Attachment 1 - Claim Cancellation Matrix

(Sheet 1 of 1)

Process Step	Reason	Reason Code	Dollar Amount	Action
Work Order Creation *Actions by Bill Preparer*	**Hit and Run** and therefore no responsible party.	*HNR*	Any	1. Cancel all claim prerequisites. 2. Enter "Not Billable" followed by reason code to work order description. 3. Uncheck "Billable" and "Claim?" on Billing Tab.
	The total charges are **Below Threshold** and there is no follow-up work required.	*BT*	CT & MA - $200 [redacted]	
	Internal description or police report identifies **Low Hanging Wires**. High vehicles contacting wires do not qualify.	*LOW1*	< $50,000	
		LOW2	≥ $50,000	4. Supervisor will validate with Manger as well as Operations and Claims that cancelling claim is only course of action left. 5. Note billing tab once supervisor approves 6. Complete steps for < $50,000.
Police Report Resolution *Actions by Bill Preparer*	**No Police Report** or police report does not identify responsible party.	*NPR1*	< $10,000 considering actual and pending charges	1. If too early to reasonably evaluate charges, place PRE678 INPRG. 2. Once work order status is "COMP", follow steps based on costs. 3. Cancel all remaining claim prerequisites. 4. Enter "Not Billable" followed by reason code in work order description. 5. Uncheck "Billable" and "Claim?" on Billing Tab.
		NPR2	≥ $10,000	6. Send Freedom of Information Letter (FOIA) to the agency to obtain police report or any other documentation they may have. 7. If responsible party identified, follow steps based on costs. 8. If responsible party NOT identified, review with Supervisor and then Complete steps for <$10,000.
		NPR3	≥ $50,000	9. Supervisor will validate with Manger as well as Operations and Claims that cancelling claim is only course of action left. 10. Note billing tab once supervisor approves 11. Complete steps for < $10,000.
	Low Hanging Wires	*LOW1*	< $50,000	See instructions above in Work Order Creation.
		LOW2	≥ $50,000	
Dig Up Documentation Resolution *Actions by Bill Preparer*	There is **No Dig up Documentation** or the documentation does not identify responsible party	*NDUP1*	< $50,000 considering actual and pending charges	1. If too early to reasonably evaluate charges, place PRE689 INPRG. 2. Once work order status is "COMP", follow steps based on costs. 3. Cancel all remaining claim prerequisites. 4. Enter "Not Billable" followed by reason code in work order description. 5. Uncheck "Billable" and "Claim?" on Billing Tab.
		NDUP2	≥ $50,000	6. Supervisor will validate with Manger as well as Operations and Claims that cancelling claim is only course of action left. 7. Note billing tab once supervisor approves. 8. Complete steps for < $50,000.
Prior to Finalizing the Bill *Actions by Bill Preparer*	The bill has not been completed and date is **beyond** the Billing Deadline, or 90 days prior to the **Statute of Limitation** (SOL).	*SOL*	Any	1. Review with supervisor, once approved go on to next step. 2. Cancel all remaining claim prerequisites and bill (if created). 3. Enter "Not Billable" followed by reason code and then brief explanation to work order description.
Claims Review of Package *Actions by Claims Analyst*	The package is complete and appropriate but the **Claim** is determined **unbillable**.	*CLAIM1*	< $10,000	1. Cancel all remaining claim prerequisites and bill. 2. Enter "Not Billable" followed by reason code and then brief explanation to work order description. 3. Uncheck "Billable" and "Claim?" on Billing Tab.
		CLAIM2	≥ $10,000	4. Manger will validate with Operations and Claims that cancelling claim is only course of action left. 5. Note billing tab once approved. 6. Complete steps for < $10,000

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Attachment 2 - Lexis Nexis Response Actions

(Sheet 1 of 1)

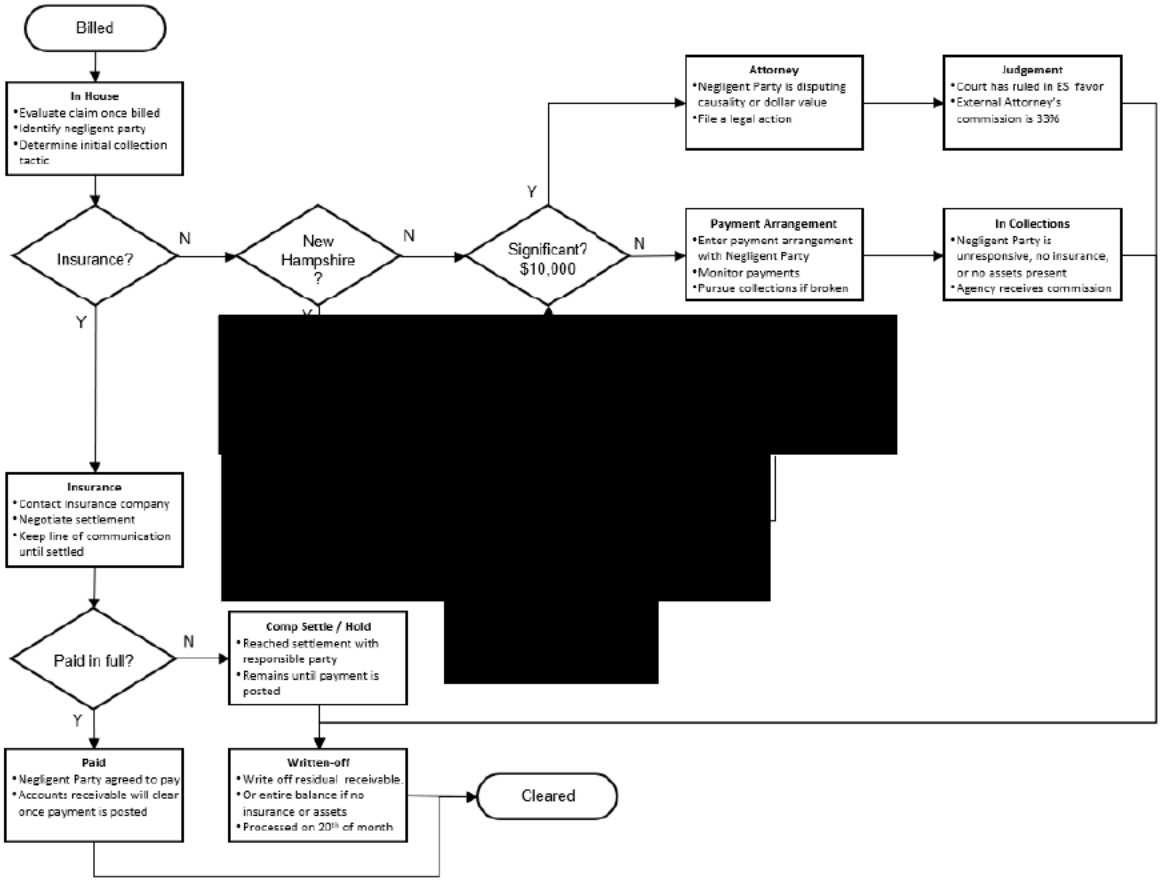
CODE		Reason	Description	ACTIONS
COMPLETED Lexis Nexis Code	PRAC	Police Report Attached	A report was found by police records and forwarded to you by LexisNexis.	Process police report in Maximo and complete prerequisite (678).
	NRFN	No Report Found	The report could not be found with the info provided. Suggestions are made as to what information would help.	Follow instructions in Property Damage Claim Cancellation Matrix.
	NRWN	No Report Written	Some police do not write a report for losses on private property of if the loss is under a certain value. We deliver the notification to you describing the outcome.	
	MISC	Miscellaneous-Not Found	When a report cannot be found for reasons out of the ordinary, you are sent a No Report Found notice with notes of explanation. This could be a situation where the officers responded, no log call was generated and **no report was written**, or it could be the agency just cannot find a report.	
	ARIN	Police Agency failed to respond	If a report request is distressed, two or more calls are made, and second requests are submitted if allowed. When we have been promised the report, but it still has not been received. The request is terminated, and we would forward any response once it is received.	
	RNRN	Report Released to Insured Only	A few agencies will not release a report to anyone other than a party involved. This is a notification to let you know we are unable to obtain this report.	Send Freedom of Information Act (FOIA) letter to obtain report.
	SIOI	Report Not Releasable	This code indicates the report was not releasable. If the release of the report is expected in the future, the notification describes the situation.	
	DURI	Duplicate Request	If you have an active request in our system and you generate another request, you are sent a notice of the duplicate and the report is not re-ordered. No charge applies.	Validate first request was submitted and acted upon accordingly.
PENDING Lexis Nexis Code	CRII	Conflicting Information on Request	Your report request had information in one section that conflicted with another section. Example: Order report from "CA HP" but the state of loss shows "NJ". No charge applies.	Resubmit request for police report with appropriate information.
	IISI	Insufficient Info to Order	This report cannot be ordered due to missing some critical information. A notice is generated telling you what info you need. No charge applies.	
	WPJR	Wrong Jurisdiction-More Info Required	Your request specified an agency, but they advised LexisNexis it was not theirs. There was insufficient info to determine the correct jurisdiction.	
	SRRI	Signed Release Required	Some police agencies require a party involved to sign a release allowing us to get a copy of the report. The notice contains instructions on how to get the release to us and also to re-order the report. No charge applies.	Bring to Supervisor.
	PDFR	Agency Failed to Respond- Reorder	If an agency states they did not receive the request, we reorder the report on your behalf. No further action is required by your adjuster. No charge applies.	No action required.
	RCAC	Agency Address Change	If your report was requested from an agency that has moved and comes back to us as 'No Forwarding Address', we obtain the correct address and reorder the report. No further action is required by your adjuster. No charge applies.	
	RCCC	Agency Requirements Change	If your report was requested from an agency that has changed their requirements since our last contact, we send you a notice and reorder the report. No further action is required by your adjuster. No charge applies.	
	RCER	Agency Error- Reorder	Sometimes an agency will make a mistake and requires corrective action. We coordinate the corrective action and reorder the report for you. No further action is required by your adjuster. No charge applies.	
	RNNF	Report Number Needed	If an agency requires a report number to do a search and it is missing from your request, we will contact the agency to obtain the report number on your behalf. If we are unable to obtain the report number, we will terminate the order with notes of explanation. No charge applies.	
	ROTH	Wrong Info Submitted from Client	This is the same as a NRFN, except the information submitted was not correct and the agency could not locate the report. We correct the information and resubmit the order and notification explaining the problem is delivered to the adjuster. No further action is required by your adjuster.	
	RRSC	LN Error	Once in a while we will make a mistake. We take corrective action, reorder your report and send you a notice advising you of the situation. No further action is required by your adjuster. No charge applies.	
	WJRR	Wrong Jurisdiction-Reroute	Your request specified an agency, but they advised LexisNexis it was handled by another jurisdiction. We reroute the request to the correct jurisdiction. No further action is required by your adjuster.	

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Attachment 3 - Collection Tactic Decision Process

(Sheet 1 of 1)



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Attachment 4 – State Requirements to Notice Municipals Regarding Claim

(Sheet 1 of 1)

STATE	LEGAL AUTHORITY	NOTICE DEADLINES	CLAIMS/ACTIONS ALLOWED	COMMENTS/EXCEPTIONS	DAMAGE CAPS
CONNECTICUT	**Liability of Political Subdivisions.** C.G.S.A. § 52-557n. (codified qualified immunity established by common law). Connecticut in minority of states that still make distinction between *governmental* acts (qualified immunity from discretionary acts requiring judgment or discretion) and *proprietary* functions (no immunity for *ministerial* acts performed in a prescribed manner without judgment or discretion). Exceptions to qualified immunity: (1) failure to act leads to imminent harm; (2) statute provides for cause of action; and (3) intentional act.	Written notice must be filed with the clerk of such municipality within six (6) months after such cause of action has accrued. Statute of Limitation: An action against municipality must be commenced within two (2) years after the cause of action. C.G.S.A. § 7-101a(d). Claims for injuries resulting from defective highways, sidewalks, roads, or bridges must be brought within two (2) years and notice within ninety (90) days. C.G.S.A. §§ 13a-149, 13a-144. Section 13a-149 has savings clause that forgives inaccuracy in notice if no intent to mislead.	Municipalities generally are liable for damages to persons or property caused by: (1) Negligent acts by employees within the scope of their employment or official duties; (2) Negligence in operation of enterprise for "special corporate benefit or pecuniary profit" (*e.g.*, water supply, sewer, municipal parking garage, or golf course); and (3) Creation or participation in the creation of a nuisance. C.G.S.A. § 52-557n(a)(1). However, this liability is significantly limited by several exceptions. Suits can be brought against state or municipality for defective or poorly maintained roads and bridges. C.G.S.A. § 13a-149. For additional liability statutes, see C.G.S.A. §§ 13a-144 to 13a-153e.	No liability for acts which require the exercise of judgment or discretion as an official function of authority granted by law. C.G.S.A. § 52-557n(a)(2). Other statutory exceptions covering particular activities or conditions are set forth in C.G.S.A § 52-557n(b). No immunity when performing following *governmental* functions: (1) maintenance of a park system; (2) construction of storm water sewers (a governmental function because it is a duty imposed by the state on municipalities to maintain highways within its limits); (3) use of municipal property as a public park; and (4) traditional governmental functions such as the operation of jails, public libraries, and city garbage services.	None

[redacted]

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APPENDIX

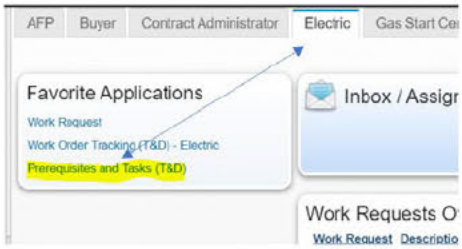
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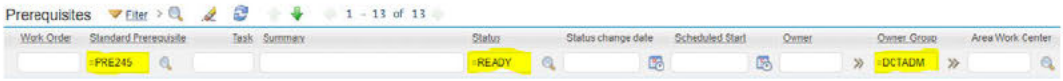
1. ALTERNATE TO PRE245-VARIANCE PORTLET

NOTE
If Maximo portlets are not working properly and provides a list of active PRE245-Variance Reconciliation, SKIP to step 2.6.4.

1.1.1 NAVIGATE to Prerequisites and Tasks (T&D) module in Maximo.



1.1.2 FILTER to active PRE245 – Variance Reconciliation for your owner group.



Territory	Owner Group
Connecticut Electric	DCTADM
[redacted]	

1.1.3 EXPORT the list of work orders to excel by clicking on the symbol all the way over on the top righthand side just above the filters.

1.1.4 Using the exported file as a work list, NAVIGATE to the Material Variance sub-tab in the Actuals tab in Maximo for each work order and perform the following:

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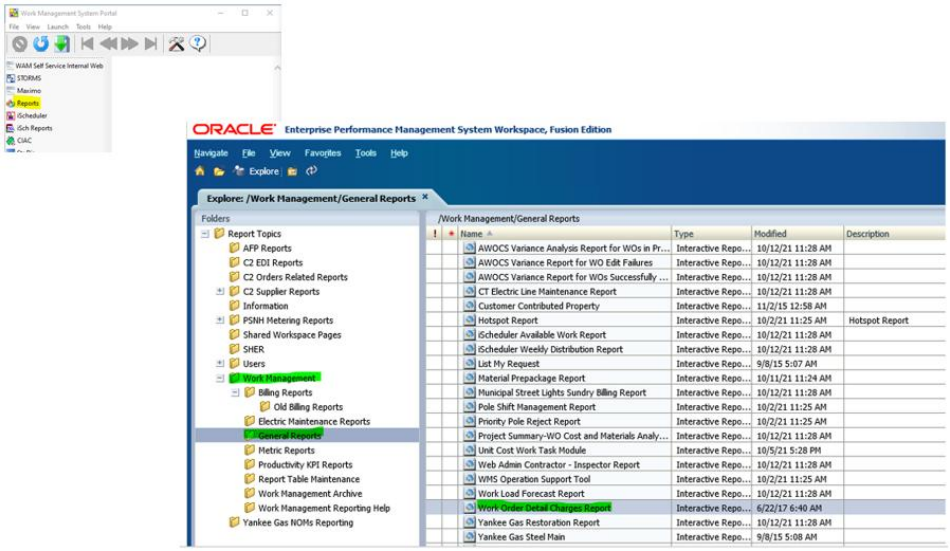
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2. USING HYPERION DETAIL OF CHARGES TO COMPARE WITH WMBS BILL.

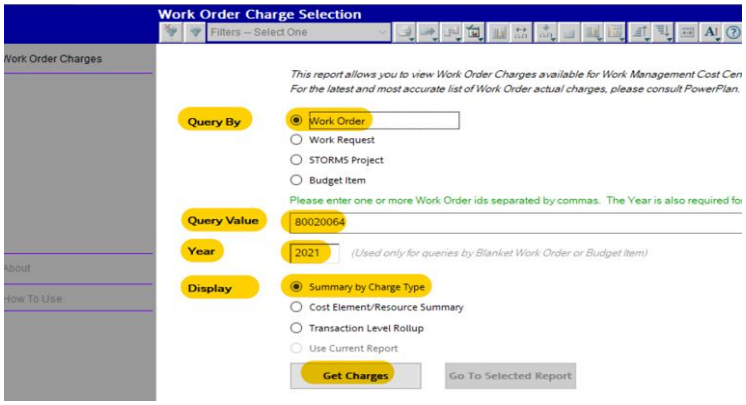
2.1.1 VALIDATE all charges in the Hyperion Detail of Charges have been applied to the work order.

a. NAVIGATE to Reports in the Work Management Portal.

b. EXPAND Work Management Folder then OPEN General reports and finally CLICK on Work Order Detail Charges Report.



c. ENTER the criterion for the query and CLICK Get Charges button where Query Value is the FWO and Year is the date of the incident.



NOTE
The AFUDC charge does not get included in any totals.

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Work Order Charges

Home

Quick Picks | 2.1 Summary by Charge Type and Sub Type

Hyperion Report

Charge Type	Sub Type	Quantity	Hours	Mib Direct Amount	Amount
Loaders	AFUDC				
	AS&E				
	Other				
NU Equipment	Construction				
NU Labor	Construction				
	Design				
Other Costs					

WMBS Report

Charge Group	Charge Description	Hours	Amount
LABOR	BASE RATE		
	Sub Total		
OTHER CHARGES	ADMINISTRATIVE SERVICES AND EXPENSES		
	Sub Total		
TRANSPORTATION	Vehicles		
	Sub Total		
Total			

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