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Passport® Claims Defense

Passport Claims Defense is an e-billing and matter management software solution for P&C insurers. It helps transparently manage claims litigation and control legal spend while providing its users with data to drive better decisions and produce better claims outcomes. Passport Claims Defense is comprised of two components - one for the claims organization and one for staff counsel. Both are designed with end-user needs in mind, providing claims professionals and staff attorneys an easy-to-use experience. In addition, Passport integrates with the solutions already in use in a claims organization – AP, claims management, document assembly and management, Microsoft Outlook and Office – to take full advantage of your technology investments.

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For Claims Organizations

Passport for Claims Professionals aligns litigation management and analytics to help insurers assign the right cases to the right counsel at the right cost. By pairing data transparency with user-centric functionality, Passport helps claims professionals collaborate with outside counsel, efficiently manage matters, and enforce billing compliance. It provides executives with visibility into litigation, firm, and organizational performance, giving them the intelligence they need to make more strategic decisions about staffing, counsel relationships, and legal spending.

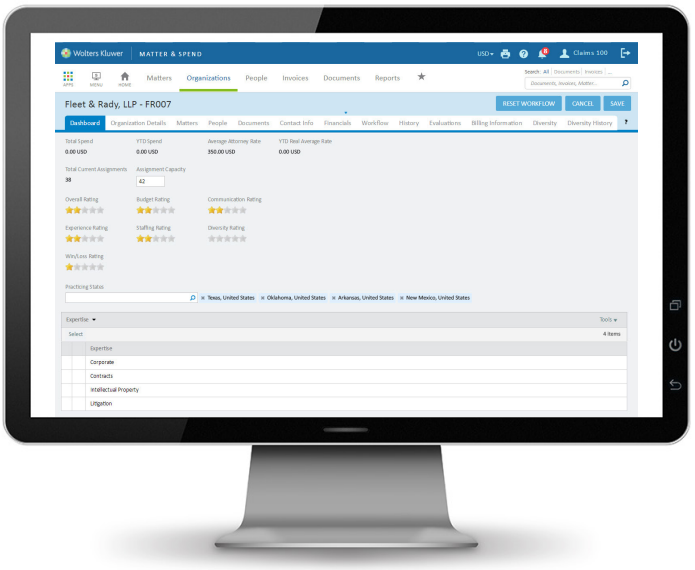
Passport Claims Defense provides:

Intelligence In Action – data, reports, and dashboards reveal performance and uncover opportunities for improvement, supported by:

- Key claims defense reports
- Data analytics
- Dashboards
- Firm/timekeeper score carding
- LegalVIEW Industry benchmark data

Legal Cost Control – sophisticated e-billing functions deliver transparency, compliance, and control of legal costs and activities, supported by:

- Automatic billing guideline enforcement
- Alternate Fee Arrangement (AFA) definition and enforcement
- Paperless billing
- Budget collaboration
- Invoice appeals and partial pay
- Reporting and analytics
- Legal bill review services
- LegalVIEW benchmark rate data



Efficient Case Management – functionality, processes, data, and mobility enable efficient day-to-day case management and law firm collaboration, supported by:

- Law Firm Smart Select
- Dynamic case assignment workflow
- Office Companion
- Panel management
- Conflict checking
- Law firm collaboration
- Mobility

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For Staff Counsel

Passport for Staff Counsel aligns litigation management and analytics to enable staff counsel to effectively and efficiently manage their cases while maintaining the tripartite relationship with claims professionals and clients. By pairing attorney-focused capabilities with user-centric functionality, Passport helps staff attorneys efficiently manage cases, communicate with claims professionals, and track their time. It is designed to help attorneys work faster and smarter while giving them all they data they need, when and where they need it. Passport allows the staff counsel organization to consistently demonstrate their value to the carrier through reporting and analytics. It makes an "apples to apples" comparison between performance, cost, and outcome between staff and outside counsel possible.

Passport Claims Defense provides:

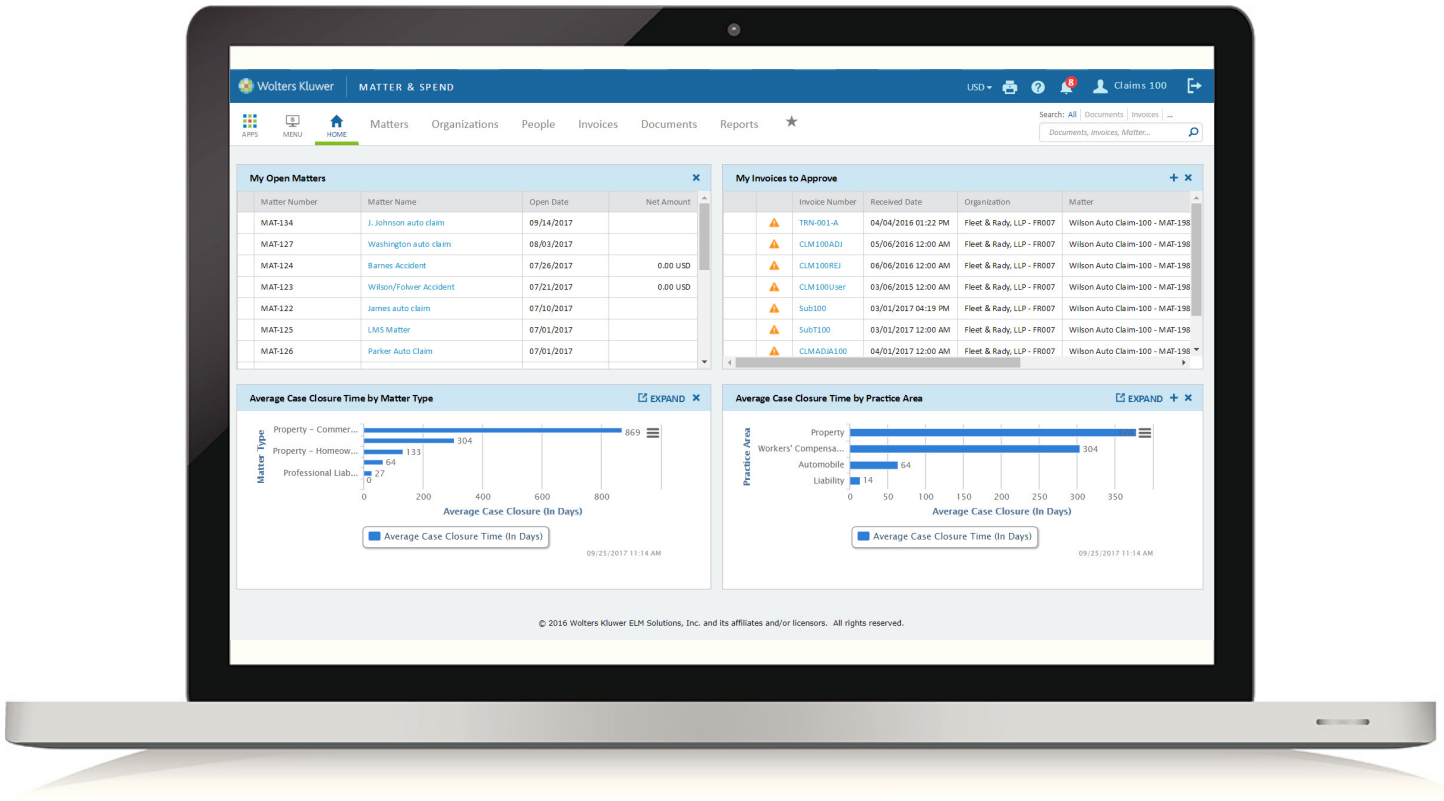
Efficient Case Management – functionality, processes, data, and mobility support efficient day-to-day case management and collaboration with claims, supported by:

- Key date generation (e-docketing)
- Conflict checking
- Mobility
- Outlook calendar synchronization
- Office Companion
- Collaboration with claims professionals
- Automatic document generation

Intelligence In Action – data, reports, and dashboards reveal performance, demonstrate value to claims, and uncover opportunities for improvement, supported by:

- Reporting and analytics
- Dashboards

Passport® Claims Defense



Use Passport Claims Defense to:

- Gain more control and transparency over legal costs
- Ensure billing guideline compliance
- Evaluate firm and attorney performance, including staff counsel
- Compare outside and staff counsel performance and outcomes
- Communicate and collaborate more effectively with outside legal service providers
- Manage firms and panels more strategically to strengthen relationships and align goals
- Manage cases and inventory faster and more efficiently
- Identify areas of improvement using data analytics
- Leverage your technology investment through integration capabilities

Passport® Claims Defense

Law Firm Smart Select

Assign the Right Firm to the Right Case at the Right Cost

Law Firm Smart Select is a set of functionality and data that helps claims professionals efficiently pick the right counsel – whether that be an outside firm or staff counsel – based on:

- Your organization's Key Performance Indicators (KPIs)
- Firm and attorney performance ratings and panel inclusion
- LegalVIEW rate benchmarking utilizing $100+ billion in real legal spend data

All the data your people need to assign the right firm to the right case at the right cost is available during the case assignment process. Decision-making is driven by gathered intelligence, your claims organization's priorities, firm relationships, and industry benchmarking. At the end of each case, Passport asks your claims professionals to score the firm and attorney, and that feedback is cycled back into the case assignment process. Better data drives better decisions for better outcomes.

Office Companion and Mobility

Work How You Work, Where You Work

Passport Claims Defense allows claims professionals and staff attorneys to work how they want to work, where they want to work. By giving them the case management capabilities they need within popular Microsoft Office tools like Outlook, Word, and Excel, they can manage their litigated claims in the software they're most comfortable working with. For Passport users who are handling claims out of the office or in court, Passport Mobility gives them all the functionality and data they need on their mobile devices.

Legal Bill Review

Total Cost Control with LegalVIEW Bill Analyzer

Wolters Kluwer provides insurers with comprehensive legal cost control by combining our Passport products with our LegalVIEW BillAnalyzer service. Passport has the ability to intake invoices, automatically enforce billing guidelines, kick off appeals with the firm, and partially pay invoices. LegalVIEW BillAnalyzer uses a combination of sophisticated machine learning to analyze millions of line items and look for hidden patterns, an expansive database to benchmark invoices against, and a team of experienced legal professionals to perform reviews and handle the appeals process. Wolters Kluwer works with each client to determine the best mix of software and services to address their e-billing and invoice review needs.

Working With Your Firms

Law Firm Support and Collaboration

Wolters Kluwer is a firm's first point of contact when they need help. From onboarding to multi-lingual global support 24x7, we provide all the technical assistance firms require so your organization does not need to dedicate time or resources to customer support. We know firms are important partners to your success and strive for high first call resolution rates. We work hard to support your firms in their use of Passport to submit invoices and give them tools to collaborate with your claims professionals to ensure you have updated budgets, matter narratives, and timekeeper rates.

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