

# Property Loss Management

Insurance Premium Discount Program

Property Schedule Review

# Property Claims Review Component:

This presentation is provided to assist your entity to complete the requirements of the Property Claims Review component of this program.

This presentation provides instructions to obtain the required claims report and directions for your review of the information.

3) By October 1, 2020, assemble a panel and review your property claims activity report identifying trends and common factors. This panel shall develop a basic plan to address the occurrence of property claims incorporating property loss management strategies. Submit reviewed property claims activity report and basic plan to Aric Curtiss, RMTD, by October 31, 2020.

**Notice of Election Form**

**FY 2021 Property Loss Management Insurance Premium Discount Program**  
**Risk Management & Tort Defense Division**  
**Department of Administration**

Purpose & General Provisions:

The Risk Management & Tort Defense Division (RMTDD) offers a property insurance premium discount of up to 10% to state agencies and universities that establish and maintain a comprehensive and effective Property Loss Management Program. The discount shall be applied against the participant's budgeted property insurance premiums in FY 2022.

Requirements and Documentation:

Premium discount of up to 10% will be based on participant's completion of the following during FY 2021:

1. **By June 15, 2020**, a Deputy Director, Vice President, Institutional Director, or person of equivalent position must sign this certificate in this program. The named contact will receive a Program Binder<sup>1</sup> by July 15, 2020.
2. **Prior to December 1, 2020**, assemble a panel to review your reported commercial property schedule. Upon review of this schedule the panel shall develop a strategic plan to ensure identifying property details are reported by January 15, 2021. This aligns the plan to Act 609, effective by October 31, 2020.
3. **Before June 1, 2020**, assemble a panel and review your commercial property schedule.

your contribution toward responding to recommendations contained in Property Loss Management letters issued by RMTD and/or to consultants. Responses must indicate that a reasonable effort to comply with recommendations is made.

\* *Reference Program Rider for additional details including required panel membership, directions to submit property schedule and claim activity report, program evaluation criteria, and other important information*

Contact Sam Corbin, RMTD, at 844-3466 or [SCorbin@rmtd.com](mailto:SCorbin@rmtd.com) with any questions or for additional information

**- Notice of Election -**

Loss Management Insurance Premium Discount Program

Our current person for this program is \_\_\_\_\_

(Individual Signature) (Name) (E-mail) (Phone Number) (Title)

Each participant will be notified of its eligibility for a discount by July 1, 2021 as indicated below:

Comments: ☐ Discount Approved ☐ RMTD USE ☐ Discount Disapproved

\_\_\_\_\_  
%  
\_\_\_\_\_

2020 RMTD Notice of Election Form

Feel free to contact RMTD loss prevention staff with any questions after you have reviewed this presentation.

# Key Dates:

By **October 1**, assemble a panel and review your property claims activity report identifying trends and common factors.



# Key Dates:

Prior to **October 31**, the panel develops a basic plan to address the occurrence of property claims incorporating property loss management strategies.

# Key Dates:

**Prior to October 31**, submit one copy of your reviewed claims report and your plan to RMTD.

Insert within your program binder a second copy of your reviewed claims report and your plan.

# Property Claims Activity Report

For this component you are to use your entity's standard pre-formatted property claims database activity report.

Your entity's Risk Management Committee representative has been provided instruction and credentials to access the secure site hosting claims reports. Coordinate with your Risk Management Committee representative.

To identify your entity's Risk Management Committee representative:

1. Visit RMTD's web site at [www.rmtd.mt.gov](http://www.rmtd.mt.gov)
2. Select "Advisory Groups"
3. Select "Members" under Risk Management Committee



# Step 1: Print Your Claims Report

Your entity's Risk Management Committee representative has been provided instruction and credentials to access the secure site hosting claims reports. Coordinate with your Risk Management Committee representative.

The Standard (not customized) report is to be used.

Users may need to be connected through the state or university network.

## Step 2: Organize a Panel

It is not expected that this review panel be the same as your property schedule review panel.

Your entity's review panel should include individuals familiar with your entity's claims handling process and be empowered to develop and carry-out their plan addressing property claims. Your panel shall involve these individuals at a minimum:

- ✓ Your entity's Property Loss Management Program Contact Person
- ✓ Your entity's Risk Management Committee Representative
- ✓ Your entity's property claims processing person
- ✓ Your entity's head of maintenance/ facilities
- ✓ A high-level entity manager (i.e. Director, President, Deputy Director, Vice President, etc.)
- ✓ Any others

A single person may fill more than one role.



## Step 3: Convene a Meeting

By October 1st, convene a meeting of your entity's panel to review and discuss your entity's property claims.

Your panel does not need to meet as one body.

Your panel may work collaboratively from various locations noting that they are to identify trends and common factors contributing to the entity's property claims, and then develop a single basic plan to address the occurrence of property claims incorporating property loss management strategies.

The standard report required for this component includes claims which occurred during the current fiscal year as well as during several prior fiscal years. All included claims should be reviewed. In subsequent years a panel will review a particular claim several times as the claim matures until it ages off this report.

# Review Questions

Your panel should ask questions of every claim. Example questions include:

- Did policies and procedures exist at the time?
- Were policies and procedures adhered to?
- Do policies and procedures need revised?
- Were there (or should there have been) warnings?
- Have similar claims previously occurred?
- Were involved individuals fully trained?
- Did proper people review the claim?
- Have steps been taken to prevent reoccurrence?
- Are there other locations where a similar claim could occur?
- How could this claim have been less severe, costly, or inconvenient?

You may contact RMTD Claims staff to discuss any claim.

# Identify Trends

## Under “Claimant”

- Identify common properties, sub-agencies or operations.
- Identify common designs, equipment, etc.

## Under “Loss Date”

- Identify common dates or seasons (spring, winter, etc.).
- Is a loss date also a holiday or long weekend?
- Does a loss date coincide with a specific event or activity?

## Under “Loss”

- Identify common loss codes.

## Under “Claim Description”

- Evaluate each description noting common factors.



# What if our report shows no property claims?

The standard report used includes claims which occurred during the current fiscal year as well as during several prior years.

We congratulate your entity if no property claims are revealed for the time period covered by this report. This may be due to an effective property loss management program being developed and executed in the past.

In our ever-changing world, your program should be reviewed regularly and revised to ensure continued effectiveness. Your plan should also address what your entity will do in the event of a claim.

# What if our report shows no new property claims?

Program participants are to review all claims provided on their report. The standard report includes claims which occurred during the current fiscal year as well as during several prior years.

Program participants will review the same claim several times over the years until the claim ages off this report. Each year, data for any claim may change as the claim matures.

We congratulate your entity if no new property claims have occurred. This may be due to an effective property loss management program being developed and executed in the past.

Your past program should be reviewed and revised to ensure continued effectiveness.

## Step 4: Develop a Plan

After reviewing your entity's property claims, and by October 31st, your panel is to develop a basic plan to address the occurrence of property claims.

There is no specified format for your plan other than it should be no more than 1 to 2 pages.

Each review panel member should sign the plan with their name, title, and the date, signifying their concurrence and support of the plan.



# Developing a Plan

Your plan should:

- ✓ incorporate property loss management strategies;
- ✓ be realistic and feasible;
- ✓ have a goal of reducing the occurrence and/or severity of property claims and losses;
- ✓ be reviewed with all others who will play a roll in the plan;
- ✓ empower and enable individuals to execute the plan;
- ✓ comply with applicable statutes, codes, and standards;
- ✓ be approved by entity management and others as required

Actions called for through this plan should be evidenced throughout your entity's Property Loss Management Program.

## Step 5: Submit Materials

Each review panel member should sign the claims activity report and the plan with their name, title, and the date. This signifies their participation, concurrence and support of the review and plan.

Submit one copy of your signed claims activity report and your basic plan to Aric Curtiss, RMTD.

acurtiss@mt.gov

RMTD

PO Box 200124

1625 11<sup>th</sup> Avenue

Helena, MT 59620-0124

Fax: 406.444.2592

Insert a second copy of your signed claims activity report and your basic plan within your program binder to be submitted to RMTD by June 1.

## Step 6: Implement Your Plan

Your entity's plan to address claims should be executed and evident throughout your property loss management program.



# Your Claims Report

## Claim ID

The Claim ID is an identifier assigned by RMTD. Property claims begin with "P".

Reference the Claim ID if contacting RMTD regarding a claim.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

Classification	Coverage Code	Report Order	Expense Limits	Query Date							
ALL	P	Claimant	No Limits	Payment Date from 07/01/2016 to 07/16/2020							
CLAIM ID	CLAIMANT	SUBROGATED	LOSS DATE	RESOLVED DATE	LAE	INDEMNITY	LOSS	CLAIM DESCRIPTION			
Agency: DEPARTMENT OF ADMINISTRATION											
Division: DEPARTMENT OF ADMINISTRATION											
P-26986	ADMIN - GSD - SCOTT HART		06/13/2017	06/14/2018		\$134,908.36	FLOOD	RAIN WATER ENTERED BASEMENT			
P-26987	ADMIN - WALT SULLIVAN		06/09/2017	12/20/2018		\$50,279.25	WATER DAMAGE	STEEL PLUMBING FIXTURE DETERIORATED			
P-29158	ADMINISTRATION		10/09/2019	04/06/2020		\$33,110.35	FREEZING	HEATING PIPE BROKE CAUSING FLOODING			
P-29191	ADMINISTRATION		10/09/2019	01/21/2020		\$2,680.14	FREEZING	ROOF DRAIN LEAKING AND RUNNING INTO CEILING			
P-26626	ADMINISTRATION - CAPITOL		01/08/2017	12/20/2018		\$7,347.30	WATER DAMAGE	WATERLINE RUPTURED OFFICES AND BASEMENT FLOODED			
P-26567	ADMINISTRATION - GSD		11/28/2016	12/22/2016		\$4,139.00	LEAKAGE	WATER LINE CRACKED			
P-28460	ADMINISTRATION - GSD		03/25/2019	10/23/2019		\$17,812.00	FREEZING	SNOW/ICE BUILDUP ON ROOF			
P-28598	ADMINISTRATION - GSD, COGSWELL BUILDING		05/20/2019	08/26/2019		\$833.25	WATER DAMAGE	PIPE PLUG CORRODED FITTING			
P-28532	ADMINISTRATION - GSD, EXECUTIVE RESIDENCE	Yes	03/13/2019	05/30/2019			STRUCK BY VEHICLE	COUNTY VEHICLE STRUCK LIGHT POLE			
P-27264	ADMINISTRATION - GSD, SECRETARY OF STATE		07/06/2017	02/14/2018		\$8,956.60	EARTHQUAKE	EARTHQUAKE CAUSED SHELVING UNITS TO TOPPLE AND BEND			
P-28503	ADMINISTRATION, EXECUTIVE RESIDENCE		03/25/2019	08/10/2019		\$1,754.00	FREEZING	SIGNIFICANT BUILDUP OF WATER AND ICE			
P-26259	ADMINISTRATION, GENERAL SERVICES		07/11/2016	11/28/2016		\$2,050.00	WATER DAMAGE	LEAK FROM ROOF OR PIPE			
P-28279	ADMINISTRATION, HEALTH CARE BENEFITS		12/24/2018	02/25/2020		\$11,577.35	ELECTRICAL	VACCINE FRIDGE FAILED			

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Activity

Note: (1) Loss adjustment expenses equal legal fees, court costs, adjuster fees, and other miscellaneous expenses.  
(2) Indemnity equals expenditures for judgments and settlements.  
(3) For Claimant ID: A=Automobile Liability, B=Boiler/Machinery, C=Foster Care Liability, G=General Care Liability, H=Helicopter, I=Inland Marine, M=Fine Art, P=Property Insurance, R=Comp/Collision Vehicle, S=Aircraft/Airport, L=Liquor Loss, F=Fidelity Bond.

# Your Claims Report

## Claimant

This is the party who experienced the loss and will be your entity or a division, bureau, unit, or location of your entity.  
This is a limited field and may be abbreviated.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

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# Your Claims Report

## Subrogated

A “Yes” in this column indicates RMTD has found another party responsible for the state’s losses. RMTD has presented the claim to this party.

Entities should review all claims, including subrogated claims.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

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# Your Claims Report

## Loss Date

This is the date the loss occurred.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

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# Your Claims Report

## Resolved Date

If a date is entered in this column, this is the date RMTD Resolved (closed) the claim.

If no date is entered in this column, the claim remains active and open. Details of this claim may change as it matures.

Assorted factors influence the timeliness of claim resolution.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

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# Your Claims Report

## LAE

LAE = Loss Adjustment Expenses.

This is the amount paid by RMTD to investigate, evaluate and/or defend the claim up to the date this report is generated.

Many property claims will have no LAE.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

Classification

Coverage Code

Report Order

Expense Limits

Query Date

ALL

P

Claimant

No Limits

Payment Date from  
07/01/2016 to  
07/16/2020

CLAIM ID	CLAIMANT	SUBROGATED	LOSS DATE	RESOLVED DATE	LAE	INDEMNITY	LOSS	CLAIM DESCRIPTION
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Agency: DEPARTMENT OF ADMINISTRATION

Division: DEPARTMENT OF ADMINISTRATION

P-26986	ADMIN - GSD - SCOTT HART		06/13/2017	06/14/2018		\$134,908.36	FLOOD	RAIN WATER ENTERED BASEMENT
P-26987	ADMIN - WALT SULLIVAN		06/09/2017	12/20/2018		\$50,279.25	WATER DAMAGE	STEEL PLUMBING FIXTURE DETERIORATED
P-29158	ADMINISTRATION		10/09/2019	04/06/2020		\$33,110.35	FREEZING	HEATING PIPE BROKE CAUSING FLOODING
P-29191	ADMINISTRATION		10/09/2019	01/21/2020		\$2,680.14	FREEZING	ROOF DRAIN LEAKING AND RUNNING INTO CEILING
P-26626	ADMINISTRATION - CAPITOL		01/08/2017	12/20/2018		\$7,347.30	WATER DAMAGE	WATERLINE RUPTURED OFFICES AND BASEMENT FLOODED
P-26567	ADMINISTRATION - GSD		11/28/2016	12/22/2016		\$4,139.00	LEAKAGE	WATER LINE CRACKED
P-28460	ADMINISTRATION - GSD		03/25/2019	10/23/2019		\$17,812.00	FREEZING	SNOW/ICE BUILDUP ON ROOF
P-28598	ADMINISTRATION - GSD, COGSWELL BUILDING		05/20/2019	08/26/2019		\$833.25	WATER DAMAGE	PIPE PLUG CORRODED FITTING
P-28532	ADMINISTRATION - GSD, EXECUTIVE RESIDENCE	Yes	03/13/2019	05/30/2019			STRUCK BY VEHICLE	COUNTY VEHICLE STRUCK LIGHT POLE
P-27264	ADMINISTRATION - GSD, SECRETARY OF STATE		07/06/2017	02/14/2018		\$8,956.60	EARTHQUAKE	EARTHQUAKE CAUSED SHELVING UNITS TO TOPPLE AND BEND
P-28503	ADMINISTRATION, EXECUTIVE RESIDENCE		03/25/2019	08/10/2019		\$1,754.00	FREEZING	SIGNIFICANT BUILDUP OF WATER AND ICE
P-26259	ADMINISTRATION, GENERAL SERVICES		07/11/2016	11/28/2016		\$2,050.00	WATER DAMAGE	LEAK FROM ROOF OR PIPE
P-28279	ADMINISTRATION, HEALTH CARE BENEFITS		12/24/2018	02/25/2020		\$11,577.35	ELECTRICAL	VACCINE FRIDGE FAILED

Printed 07/16/2020

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Note: (1) Loss adjustment expenses equal legal fees, court costs, adjuster fees, and other miscellaneous expenses.  
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Activity

# Your Claims Report

## Indemnity

This is the amount paid by RMTD for settlement and/or judgments of the claim.

Values of unresolved claims may change up to the point RMTD resolves the claim.

This amount does not include insurance deductibles or other expenses paid by your entity.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

Classification	Coverage Code	Report Order	Expense Limits	Query Date
ALL	P	Claimant	No Limits	Payment Date from 07/01/2016 to 07/16/2020

CLAIM ID	CLAIMANT	SUBROGATED	LOSS DATE	RESOLVED DATE	LAE	INDEMNITY	LOSS	CLAIM DESCRIPTION
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P-28503	ADMINISTRATION, EXECUTIVE RESIDENCE		03/25/2019	08/10/2019		\$1,754.00	FREEZING	SIGNIFICANT BUILDUP OF WATER AND ICE
P-26259	ADMINISTRATION, GENERAL SERVICES		07/11/2016	11/28/2016		\$2,050.00	WATER DAMAGE	LEAK FROM ROOF OR PIPE
P-28279	ADMINISTRATION, HEALTH CARE BENEFITS		12/24/2018	02/25/2020		\$11,577.35	ELECTRICAL	VACCINE FRIDGE FAILED

Printed 07/16/2020

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Activity

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# Your Claims Report

## Loss

Loss Codes are standardized brief descriptors selected by RMTD for classification of the claim.

See Loss Codes on next slide.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

Classification	Coverage Code	Report Order	Expense Limits	Query Date				
ALL	P	Claimant	No Limits	Payment Date from 07/01/2016 to 07/16/2020				
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P-29191	ADMINISTRATION		10/09/2019	01/21/2020		\$2,680.14	FREEZING	ROOF DRAIN LEAKING AND RUNNING INTO CEILING
P-26626	ADMINISTRATION - CAPITOL		01/08/2017	12/20/2018		\$7,347.30	WATER DAMAGE	WATERLINE RUPTURED OFFICES AND BASEMENT FLOODED
P-26567	ADMINISTRATION - GSD		11/28/2016	12/22/2016		\$4,139.00	LEAKAGE	WATER LINE CRACKED
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P-27264	ADMINISTRATION - GSD, SECRETARY OF STATE		07/06/2017	02/14/2018		\$8,956.60	EARTHQUAKE	EARTHQUAKE CAUSED SHELVING UNITS TO TOPPLE AND BEND
P-28503	ADMINISTRATION, EXECUTIVE RESIDENCE		03/25/2019	08/10/2019		\$1,754.00	FREEZING	SIGNIFICANT BUILDUP OF WATER AND ICE
P-26259	ADMINISTRATION, GENERAL SERVICES		07/11/2016	11/28/2016		\$2,050.00	WATER DAMAGE	LEAK FROM ROOF OR PIPE
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Printed 07/16/2020

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Activity

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# RMTD Loss Codes:

Theft- Theft of state owned or rented/leased vehicle.

Arson- Fire caused by a human.

Burglary- Theft, not missing property.

Collapse- Collapse of a state building, roof, wall, etc.

Earthquake- Damage as a direct result of an earthquake.

Electrical- Damage caused by electrical.

Explosion- Damage as a result of an explosion.

Fire- Damage as a result of a fire, non-arson.

Flood- Damage as a result of flooding.

Foster Care-Child- Damage as the result of an intentional act by a foster child.

Fraud- Damage as a result of a fraudulent act.

Freezing- Damage as a result of freezing.

Hail- Damage as a result of hail.

Leakage- Damage due to leakage.

Lightning- Damage caused by lightning.

Pollution- Damage caused by pollution.

Smoke Without Fire- Damage caused by smoke, not fire.

Sprinkler Leakage- Damage caused by sprinkler leakage.

Transit or Moving- Damage occurring during transit/moving.

Vandalism- Damage or destruction to property by vandals.

Water Damage- Damage caused by water other than flood/sprinkler.

Wave or Wave Crash- Damage caused by wave.

Wind or Windstorm- Damage caused by wind or windstorm.

Aircraft Accident- Damage to aircraft and/or property caused by airplane use.

Missing Property- Damages stemming from property of the state or its employees.

# Your Claims Report

## Claim Description

This is a brief description of the claim entered by RMTD. This is a very limited field.

RMTD Claims staff can be contacted for further details.

STATE OF MONTANA  
Risk Management & Tort Defense Division  
Database Activity

REPORT PARAMETERS

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Please feel free to contact  
Risk Management & Tort Defense  
with any questions or concerns  
or for assistance with this program.