Chapter 3: LGP Hearing Case

In Chapter 2 you were introduced to the Product Delivery case. In this chapter, you learn how to manage LGP pre-hearing activities and the hearing process.

Prerequisites

You should complete the following modules before beginning LGP Hearing Case:

- AMSO Overview
- Participant Management
- Case Management
- Hearing Case
- LGP Process Overview and Workflow
- LGP Forms
- LGP Product Delivery

Objectives

When you complete Hearing Case, you will be able to:

- Define Hearing Case as used in AMSO
- Manage the hearing process with AMSO
- Identify how to locate documents associated with a case
- Differentiate between tasks that AMSO handles automatically and those you must initiate
- Perform the AMSO manual tasks
- Manage hearing participants

Concepts and terms

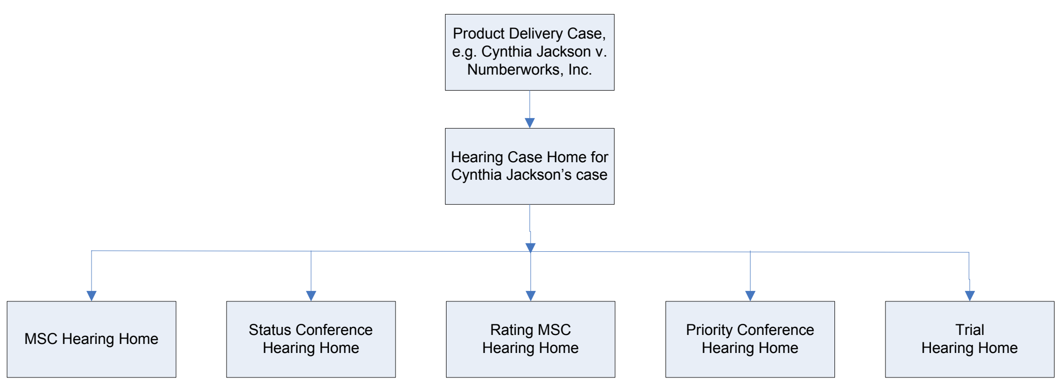
You learned most of the AMSO hearing concepts and terms in the Hearing Case overview module. You learned that filing an Application for Preliminary Pursuit (APP) automatically creates the product delivery case in AMSO and that the filing of a Declaration of Readiness (DOR) automatically creates a hearing case.

In the LGP Hearing Case you will learn about:

- Hearing Case Home and Hearing Home screens
- Related cases
- Hearing processes

Hearing Case Home and Hearing Home screens

The *Hearing Case Home* screen lists all hearings associated with a particular product delivery case. You can add or schedule a hearing from the Hearing Case Home screen. From there you can click the hearing reference number in the Hearings column to go to that *Hearing* home screen to view details about the hearing and manage the canceling, rescheduling, adjourning, and completing of the hearing. You can also add a witness, representative, interpreter, or attendee; and you can request a transcript.



Normally, hearings are automatically created and scheduled by AMSO based on the receipt of a DOR. Thereafter, however, a person—e.g., WCJ, clerk, participant—initiates activity by interacting with AMSO. For example, a WCJ might create an interim order, an SLT might close a case, a Transcript Officer might create a manual task for a court reporter, or an SLT might set up available calendar slots for a WCJ's hearings.

Related Cases

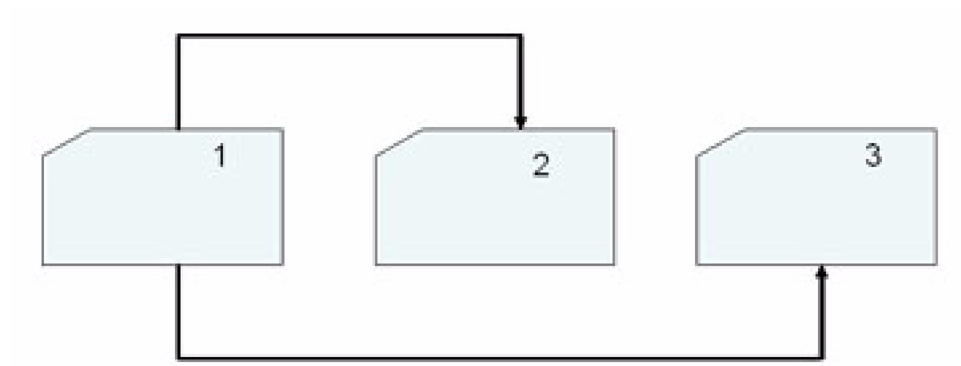
Cases sometimes should be related in AMSO. They may be *consolidated* or made *companions*. You may relate or associate cases for many reasons but primarily to:

- manage multiple cases for a single injured worker
- manage multiple workers injured in a single incident

Companion Cases When a DOR is received with multiple cases listed, AMSO will automatically relate all cases as *companion* cases and will make the first case listed the *driver* case. You can schedule, reschedule, cancel, complete, or adjourn a driver case, and all its companion cases will be similarly handled.

A DOR can list up to 15 related cases in addition to the driver case.

Note: *A driver case is linked to its companions, but the companions are NOT linked to each other as illustrated below:*



The case that functions as the driver case changes when you select a companion case to schedule a hearing; then, that case temporarily becomes the *driver case*. If you need to reschedule the hearing for those companion cases, AMSO will automatically direct you to the driver case for that hearing in order to reschedule. Any companion case can be the driver case, but there can only be one driver case per hearing.

Companion cases are treated the same *only* for scheduling activities. Everything else done (such as creating orders and correspondence) must be repeated for each companion case. For example, when the WCJ issues a closing order on a driver case, you must perform the Create Order function for *each* companion case in order for UEF to be notified. Also, when you upload documents to fileNet, you must list *all* companion cases.

You can relate cases as companions at any time. Usually this happens when the

WCJ and the attorneys decide it would be advantageous. Refer to “Insert case relationships and view related cases” on page 26.

Companion and driver cases are exclusive to the LGP Hearing Case.

Consolidated Cases When a WCJ decides to consolidate multiple cases, one case is designated the *master case*. The master case then serves as a single case for all its related cases. Parties are instructed to take all action against only the master case. When a WCJ issues an order consolidating cases and the order is created in AMSO, an event is created to document the action. The case functioning as the master case will be marked in the Related Cases list. Refer to “Insert case relationships and view related cases” on page 26.

Note: *All relationships must be made from the Master case. (Like companion cases and their driver, consolidated cases are linked* only *to their master, not to each other.)*

Terms

New terms that you will use in Hearing Case are defined in the table below:.

Term	Definition
Adjourned hearing	A hearing that has occurred but ended without resolution. Another hearing will be conducted on the same matter.
Companion cases	Multiple cases for the multiple injury incidents for a single worker.
Completed hearing	A hearing recorded in AMSO which has been concluded. No further hearings will be scheduled for the same matter. However, different hearings may be scheduled for different matters. For example, an MSC may be completed and a trial subsequently scheduled.
Consolidated cases	Multiple cases for multiple workers injured in a single incident.
Driver case	A single case that has been selected to receive the action on behalf of its companion cases
Hearing	Any proceeding that is presided over by a WCJ
Hearing case home	The screen that lists all hearings associated with a product delivery case. From this screen, you can go to individual Hearing home screens
Hearing home	The screen that allows you to manage a single hearing’s details, such as rescheduling, adjourning, or completing the hearing

Term	Definition
Hearing official	The person hearing the case (e.g., WCJ or VOC consultant)
Hearing representative	Any non-DWC employee invited to a scheduled hearing.
Master case	One case may be designated the *master case* when cases are consolidated. The master case then serves as a single case for all its related cases.
Related cases	Multiple cases that have been associated in AMSO either as consolidated or companion cases
Rescheduled or continued hearing	A hearing that has not occurred is set to a different date and time.

Hearing Processes

An LGP case normally involves:

- Pre-hearing activities
- The hearing process
- Post-hearing activities

In this module you will learn the tasks involved with pre-hearing activities and the hearing process. In the Hearing Case Part II module, you will learn the tasks involved in post-hearing activities.

Below is a flowchart of the basic hearing process. Tasks performed by AMSO alone are marked with a computer icon;

Tasks performed by a person outside of AMSO are marked with a person icon;

and tasks which require a person to interact with AMSO are marked with both icons.;

These same icons will be used throughout this module.

Additionally, you will frequently need to generate a manual task using AMSO. Manual tasks will be represented by the following icon:

Therefore, when you are asked to create a manual task on AMSO, you will see:

Review of concepts and terms

Select the correct answer for the multiple-choice items below:

1. Before you can schedule a hearing, you must

a. schedule an MSC
b. create a hearing
c. create a slot in the calendar
d. schedule a pre-trial conference

a. Multiple cases linked together are called
a. companion cases
b. driver cases
c. conjoined cases
d. ad nauseam cases

2. From which of the following can you view a list of all hearings for a Product Delivery Case?

e. Hearing home screen
b. Hearing Case home screen
b. Product Delivery Home
b. Integrated case home

a. From which of the following can you view and manage details for a specific hearing?
a. Hearing home screen
b. Hearing Case home screen
c. Product Delivery Home
d. Integrated case home

3. Which of the following is true for companion LGP cases?

a. you may schedule a hearing for only one of the cases
b. you may identify two cases as drivers
c. whatever you schedule for the driver case will be scheduled for the companion cases

d. all companion cases must have the same owner

4. Which of the following is true for scheduling hearings?
   a. AMSO automatically schedules every hearing
   b. AMSO only schedules hearings automatically when a DOR is submitted via eForm
   c. Expedited hearings must be manually scheduled
   d. None of the above

Tasks and Practice Exercises

You will learn how to perform the following tasks in this module:

- Create a hearing case
- Schedule, reschedule (continue), or view a hearing
- Create or view and order
- Create and invite a hearing representative to a hearing
- Create, view, modify, and delete a lien
- Create a disposition
- Complete a hearing

Preparing for the hearing

Pre-trial hearings such as a Status Conference, Lien Conference, or Mandatory Settlement Conference (MSC) are generally the first hearing scheduled in a case. No evidence can be presented, but if the parties settle, the WCJ must approve the settlement, called a Compromise & Release (C&R). If parties cannot reach agreement, a trial will ultimately be scheduled.

Normally, the AMSO process proceeds as follows:

1. A participant submits a DOR via an eForm (refer to the Forms module);
2. AMSO creates a hearing and schedules it;
3. AMSO randomly assigns a WCJ as case owner and notifies the WCJ and SLT; and

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Note: *If a new case is a companion case, AMSO assigns makes the case owner of the new case the same as the owner of the driver case.*

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4. If the case is an exception case—such as a request for an expedited trial or hearing—or if no WCJ is available to hear the case, then a task will automatically be created and assigned to the appropriate work queue or person.

Sometimes, however—due to an emergency walk through or a scanning failure—a hearing will need to be manually created and manually scheduled.

In any case, once a WCJ has been assigned a case, AMSO can be used to:

- review the case
- read associated documents
- possibly read related cases
- possibly add a note (refer to Case Management)
- possibly issue an order (refer to“Create or view an order” on page 13)

A Senior Legal Typist (SLT) may use AMSO to

- create correspondence and/or print and mail it (refer to Correspondence)
- create hearing representatives and attendees (refer to “Create and invite a hearing representative to a hearing” on page 16)

The Management Services Technician (MST) may use AMSO to:

- query the AMSO calendar
- schedule or reschedule hearings (refer to “Schedule or reschedule a hearing” on page 10), below.

Create a hearing case

Remember, AMSO automatically creates the hearing case upon receipt of a DOR. DORs for expedited hearings or trials are an exception; these hearings must be manually created. Additionally, if the DOR cannot be scanned or is brought in as a walk through, a hearing case must also be manually created. A hearing case bears an APP prefix.

Note: *A WCJ may Reject a DOR from the Manage section of the LGP product delivery home screen. However, if a hearing case has already been scheduled in response to the DOR the WCJ rejects, the scheduled hearing must be cancelled. You can include comments on the hearing home to indicate why the hearing is being cancelled.*

Follow these steps to create a hearing case:

1. Select **Hearing Cases** from the left-hand navigation links of the Product Delivery home screen. The Appeals home screen opens.

2. Click **Create Hearing Case**. The Create Hearing Case screen opens.

3. Enter the date the DOR was received in the Date Received field.

4. Enter text in the Comments field if desired.

Note: *These comments will automatically be included in the Notice of Hearing served on all parties.*

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5. Click **Save**. The LGP Hearing Case Home screen opens.

Practice Exercises

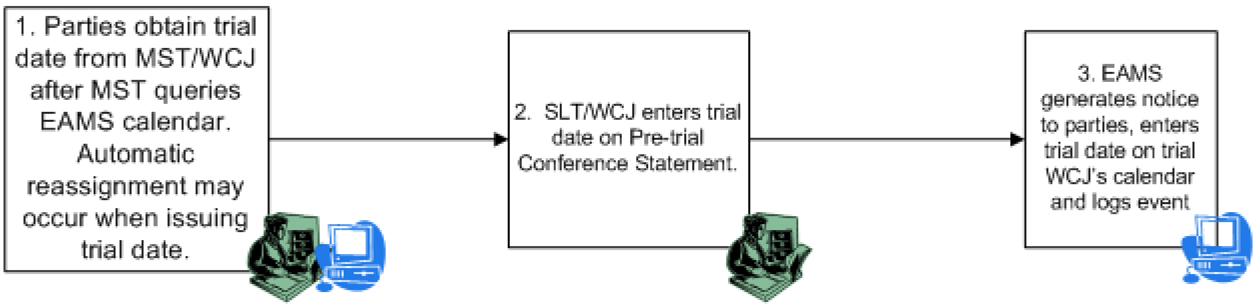
Complete the scenarios listed below using the information on your case data sheet. Typically, the hearing case would have already been scheduled when the DOR is submitted via eForm. However, for practice purposes, you will create the hearing case manually.

- **Cynthia Jackson -** Cynthia Jackson’s attorney submits a DOR for an expedited hearing. The PJ receives a task regarding the OR and determines that an MSC should be scheduled. You, the PJ, create a manual high priority task for the MST asking that the MST schedule the Expedited Hearing. Now, as MST, reserve the task. Before you can schedule the hearing, you must create a Hearing Case for Cynthia Jackson's injury. (Refer to Case Data Sheet #LGP-H1-2.1)
- **Ann Perry -** Create the hearing case for Ann Perry’s injury. (Refer to Case Data Sheet #LGP-H1-2.2)
- **Jose Ortega -** The Ortega DOR accompanied his ADD that could not be scanned and was given to you, the Calendaring Clerk, to create the product delivery case. The DOR was given to you at the same time. You want to immediately schedule the hearing on the first case, so rather than return the DOR to the scanning group, you manually create the hearing as well. (Refer to Case Data Sheet #LGP-H1-2.3)
- **Tsu Sing -** A DOR requesting a settlement conference for Tsu Sing's case was faxed, but the fax machine jammed, wrinkling the paper so it can not be scanned. The scanning group sends the barely readable fax to you, the Calendaring Clerk, to manually create a hearing case. (Refer to Case Data Sheet #LGP-H1-2.4)

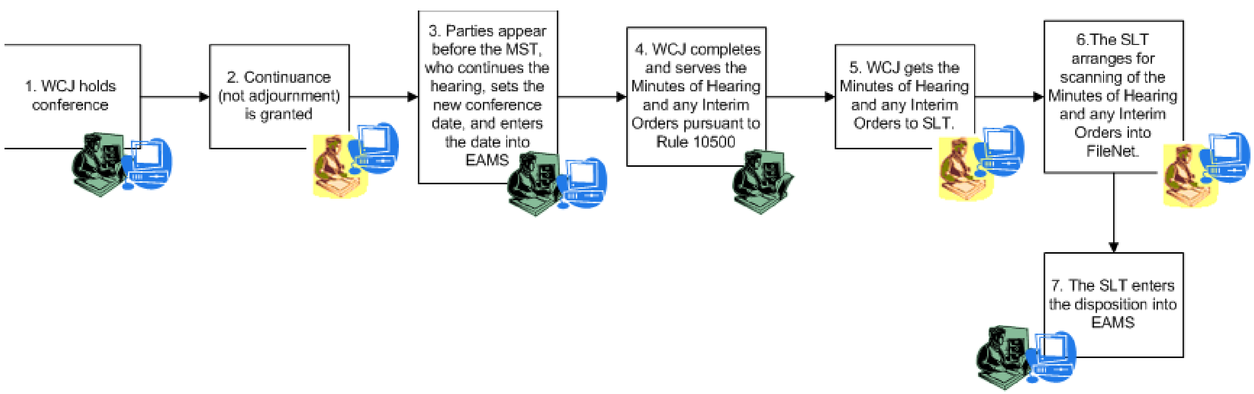
Schedule or reschedule a hearing

AMSO will generally automatically schedule most hearings because they are initiated by the filing of a DOR. Frequently, however, the MST will make manual adjustments at a WCJ's request. Additionally, all trials and walk throughs are manually scheduled.

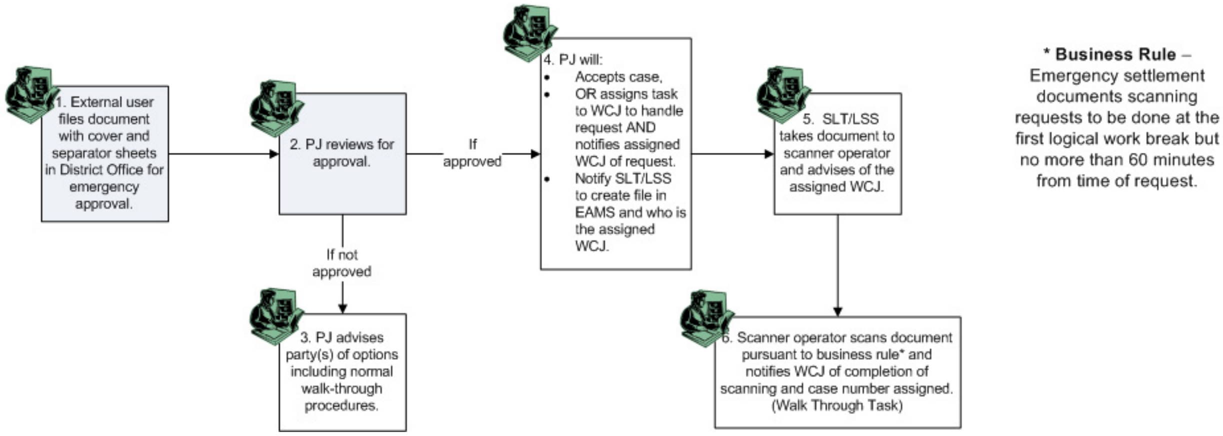
The diagram below shows how a trial date is set:



The MST will also reschedule (continue) a hearing when it is postponed to another date. The diagram below shows this process:



The PJ approves requests for expedited hearings and assigns a WCJ as follows:



Follow these steps to schedule a hearing in AMSO:

1. Click the **Schedule Hearing** link in the Manage section of the LGP Hearing Case Home screen. The Schedule Hearing screen opens.

2. Enter the earliest date that should be considered for scheduling this hearing in the Start Date field.

3. Enter the latest date to be considered for scheduling this hearing in the End Date field.

4. Click the **Magnifying Glass** adjacent to the Location field to select the District Office where the hearing is to be held.

5. Click **Select** in the Action column adjacent to the location desired. The Schedule Hearing screen reopens.

6. Select the desired type of hearing in the Type of Hearing drop-down menu. Refer to Appendix C for a comprehensive list of hearing types.

7. Leave the Hearing Official field blank to let the system find an available official, or click the **Magnifying Glass**, and enter search criteria to search by name, organization, or job function.

8. Click **Search**. User schedules will be displayed.

9. Click **Select** in the Action column adjacent to the desired slot for the hearing (or click **Reset** to enter new criteria for a fresh search). The Confirm Location Hearing screen opens.

Note: *Recall that a slot is a period of time in the calendar of an WSJ. The User Schedules list shows available dates and time periods for WCJs at the location you selected. Refer to LGP Process Overview and Workflow.*

Note: *Remember, the hearing must be set at least 16 days in the future if a Notice of Hearing is to be sent to all parties.*

10. Enter fields as desired.

11. Click **Save**. The Hearing Home screen opens. (A Hearing Home screen will not exist until the hearing is scheduled.)

Practice Exercises

Complete the scenarios listed below using the information on your case data sheet. As with other functions, typically AMSO will automatically schedule the hearing when the party submits the DOR via eForm. However, for practice purposes, today you will schedule hearings manually.

- **Cynthia Jackson -** You, the MST, schedule a Mandatory Settlement Conference (MSC) for the Cynthia Jackson case on the next available slot for the next available WCJ. Notice of the MSC is automatically sent to appropriate parties. (Refer to Case Data Sheet #LGP-H1-3.1)
- **Ann Perry -** You, the PJ, have received an AMSO-generated task informing you that an expedited hearing has been requested and asking you to review the request. You decide to grant the request and so create a task for the MST asking that the hearing be set. You, now the MST, schedule an Expedited Hearing for the Ann Perry case on the next available slot for the WCJ. Since the UEF is a party to the case, AMSO will find the first slot where both the WCJ and OD Legal are available. (Refer to Case Data Sheet #LGP-H1-3.2)
- **Jose Ortega -** You, the MST, schedule an MSC for the Ortega case in the next available slot of the WCJ. (Refer to Case Data Sheet #LGP-H1-3.3)
- **Tsu Sing -** You, the MST, schedule an Expedited Hearing for the Tsu Sing case on the next available slot for the WCJ. (Refer to Case Data Sheet #LGP-H1-3.4)

Other scheduling activities

You can perform additional scheduling activities from the Hearing Home screen.

- You can reschedule the hearing. Click the **Reschedule Hearing** link in the Manage Section, and follow the steps above. When a hearing is rescheduled, AMSO automatically generates notifications to all parties.
- You can view scheduling history. Click **Scheduling History** from the left-hand navigation links. From there you can view details about any

scheduling activity (canceling, adjourning, continuing, etc.) on the case including comments, reasons, and results.

- You can schedule or view special resources. Click **Special Resources** from the left-hand navigation links. From there you can view previously scheduled resources or schedule a new resource needed for the hearing. You can, for example, arrange for a CHP officer to attend the hearing.

Hearing Home administrative support functions

The following links are available in the left-hand navigation links section of Hearing Home:

- Court Reporters—A place to record information regarding MOH or transcripts. This information does *NOT* interact with AMSO in any way.
- Phones—A handy place to record phone numbers of hearing participants

Create or view an order

In AMSO interim and closing orders may be added to a product delivery case.

Note: *Normally, any time you create an order, penalty, petition, or lien in AMSO, you will also produce a physical document using the Create MS Word function the Communications link in AMSO or via FileNet (see Document Management).*

Follow these steps to create or view an order:

1. Click **Orders** from the left-hand navigation links of the Product Delivery home screen. The Order List screen opens.

2.

If you want to…	**then…**
view an order,	a. click **View** in the Action column adjacent to the order you wish to view, and the View Order Details screen opens; b. click **Close** when finished, and the Order List screen reopens.
else if you want to…	

create an order,	a. click **New Order**, and the Order Details screen opens; b. select an order from either the Closing Order or the Interim Order drop-down menu; c. enter text in the Information box; click **Save**, and the Order List screen reopens.

Note: *File (create) an* Order Amending Decision *to amend an existing order or an* Order Rescinding Decision *to rescind an existing order*

Practice Exercises

Complete the scenarios listed below using your case data sheet.

- **Cynthia Jackson -** Cynthia's employer files a Petition for Discovery asking for certain records. Numberworks, Inc., represented by Crane, Poole, and Schmidt, submits the petition to AMSO. As the WCJ, you receive a Review Petition task. You review the petition, determine that the fees should be assessed, and dictate your order to your secretary. (Refer to Case Data Sheet #LGP-H1-4.1)
- **Ann Perry -** Ann Perry’s employer, Finn Construction, represented by Rosato & Associates, files a Petition for Discovery asking for certain records. You, the SLT, receive a task asking that the petition be reviewed. The WCJ decides the petition is valid and asks you to create the order. (Refer to Case Data Sheet #LGP-H1-4.2)
- **Jose Ortega -** McDougal Chicken, represented by Bendini, Lambert & Locke, files a Petition for Discovery and submits the petition to AMSO. You, the WCJ, view the petition, determine that the fees should be assessed, and dictate your order to your SLT. Then you, now the SLT, create the order in AMSO. (Refer to Case Data Sheet #LGP-H1-4.3)
- **Tsu Sing -** The attorney for Middlefield Oil Ltd., represented by Gage Whitney Pace, defendant in Tsu Sing’s case, files a Petition for Discovery asking for certain records. You, the case owner, receive a task asking you to view the petition. You decide the petition is valid and then create an order granting the petition. (Refer to Case Data Sheet #LGP-H1-4.4)

Change the owner of a Product Delivery case

The owner of a product delivery case is ‘system’ until the first hearing is scheduled. Then the WCJ scheduled to hear the case is assigned as case owner. Thereafter, LGP cases will be sometimes be reassigned. Reasons may include, but are not limited to: challenge, WCJ recusal, WCJ unavailable, WCJ disqualified, or change of venue.

Follow these steps to change the owner of a Product Delivery Case:

1. Select the **Change** Link displayed next to the name of the current owner of the case shown on Product Delivery Case Home. The Set Case Owner screen will open.
2. Click the **magnifying glass icon**. The User Search screen opens.
3. Enter as much search criteria as possible.
4. Click **Search.** The User Search screen will open.
5. Click **Select** from the Action column adjacent to the desired new owner. The Set Case Owner Details screen opens.
6. Select the **reason** for the change from the Reason drop-down menu. See Appendix B for a complete list of reasons.
7. Enter text in the Comments box if desired.
8. Click **Save**. The case home screen reopens.

Practice Exercises

Complete the scenarios listed below using your case data sheet.

- **Cynthia Jackson -** A new case owner will be assigned because the venue has changed. Sacramento's PJ decides to assign the case to WCJ Muriel Evans. You, the PJ's secretary, change the case owner to Muriel Evans. (Refer to Case Data Sheet #LGP-PD-5.1)
- **Ann Perry -** Amelia Peabody has moved to Hawaii and can no longer function as the owner of Ann Perry’s case. Reassign the Ann Perry case to WCJ Muriel Evans. (Refer to Case Data Sheet #LGP-PD-5.2)
- **Jose Ortega -** A new case owner must be assigned to the Ortega case since Mr. Ramirez now lives in Fresno and his change of venue has been approved. Change the case owner to WCJ Miles Martin. (Refer to Case Data Sheet #LGP-PD-5.3)
- **Tsu Sing -** A walk-through settlement document arrives for the Tsu Sing case. The document is processed in AMSO and a task is sent to the PJ for case assignment. The PJ determines the appropriate WCJ for the case is Paula Gonzalez and assigns the case to her. You, the LGP Clerk, add WCJ Gonzalez as the owner of the case. (Refer to Case Data Sheet #LGP-PD-5.4)

Create and invite a hearing representative to a hearing

AMSO automatically invites all participants to all hearings. However, if an additional hearing representative is identified *after* the hearing has been set, you can use the Add Representative function to invite the person. A representative is a case participant who attends a hearing on behalf of the appellant. An example is an attorney hired to represent the appellant's interests at the hearing. They are organized by type—e.g., lawyer, family member, union representative. You must create and register all hearing representatives for a case *before* the hearing and allow enough time for the invitation to be delivered.

Follow these steps to create a hearing representative:

1. Click **Add Representative** in the Manage section of the Hearing Home screen. The Create Hearing Representative screen opens. (Alternatively, you can click **Representatives** in the left-hand navigation links and then **New**.)

2. Select the representative from the Hearing Representative drop-down menu.

3. Enter a dollar figure in the Fee field if appropriate.

4. Click **Save.** The Hearing Home screen reopens.

Note: *The new hearing representatives will appear on the Hearing Representatives list. You can access this list by clicking **Representatives** in the left-hand navigation links.*

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5. Decide if the person is a participant or non-participant.

If...	**then...**
the person is a participant,	select **the participant name** in the Hearing Representative drop-down menu.
else if...	
the person is *not* a participant,	fill in the requested information in the Details section.

6. Select the appropriate category for the representative in the Type drop-down menu, *if desired.* This is not a required field.

7. Click **Save & New** to add another representative or **Save** to exit the task

Practice Exercises

Complete the scenarios listed below using your case data sheet. Now that you've scheduled hearings for the above cases, you must add each participant as a hearing representative on the case. Typically, this will also be done automatically, but for practice purposes please add each participant as a hearing representative.

- **Cynthia Jackson -** Add hearing representatives to the Cynthia Jackson upcoming hearing. (Refer to Case Data Sheet #LGP-H1-5.1)
- **Ann Perry -** Add hearing representatives to Ann Perry's upcoming hearing. (Refer to Case Data Sheet #LGP-H1-5.2)
- **Jose Ortega -** Add hearing representatives to Jose Ortega's upcoming hearing. (Refer to Case Data Sheet #LGP-H1-5.3)
- **Tsu Sing -** Add hearing representatives to Tsu Sing's upcoming hearing. (Refer to Case Data Sheet #LGP-H1-5.4)

View, create, modify, or delete a lien

Parties to the case, such as medical practitioners, attorneys, or the Employment Development Department (EDD), may create liens to ensure they receive payment. They generally file an eForm from which AMSO automatically creates a lien. However, at times a clerk will be asked to create the lien.

Note: *You cannot add a lien until the lien claimant has been added as a participant.*

Follow these steps to view, add, modify, or delete a lien:

1. Select the **Liens** link from the left-hand navigation links of the Hearing Case Home screen. The View Lien List screen opens.

2. Add, view, modify, or delete a lien as follows:.

If you want to...	then...

add a lien	a. click **New Lien**, and the Create Lien screen opens; b. select the Lien Claimant from the Lien Claimant drop-down menu; c. enter a dollar amount in the Weekly Rate Amount field; d. click the **calendar icon**, and fill the Date Filed field; e. click the **calendar icon**, and fill the Opening Lien Commencing Date field; f. click the **calendar icon**, and fill the Original File Date field; g. select a reason from the Reason drop-down menu (refer to Appendix B for a complete list of reasons); and h. click **Save**.
else if you want to...	
view a lien	a. click **View** in the Action column adjacent to the Lien Claimant Name, and the View Lien screen opens; b. click **Close** when finished viewing.
else if you want to...	
modify a lien,	a. click **View** in the Action column adjacent to the Lien Claimant Name, and the Modify Lien screen opens; b. click **Edit**; make the desired changes; and c. click **Save**.
else if you want to...	
delete a lien,	a. click **View** in the Action column adjacent to the Lien Claimant Name, and the View Lien screen opens; b. click **Delete**, and the Delete Lien screen opens; c. click **Yes** to confirm.

The View Lien List screen reopens

Practice Exercises

Complete the scenarios listed below using your case data sheet.

- **Cynthia Jackson -** Cynthia's primary physician, Dr. Samia Mir, has not been paid for her treatment and has filed a lien against Cynthia's case.

In most cases, the Request for Allowance of Lien will be automatically created through an eForm, but in this rare instance, Dr. Mir sends in the form, and it cannot be scanned because her writing is readable but not legible enough. The LGP Clerk creates that request for allowance of lien in AMSO.

The WCJ reviews the Request for Allowance of Lien in Cynthia's case, determines that it is a valid lien, and issues an Order Allowing Lien specifying that the lien claimant and defendant, Numberworks, represented by Crane, Poole, and Schmidt, settled the lien. You, the WCJ's secretary, log that the order has been sent out.

After the lien is filed, Dr. Samia Mir provides additional services for Cynthia Jackson, so she files an amended handwritten lien. Usually amended liens are handled automatically in AMSO through the submission of an eForm; however, as Dr. Mir's handwritten lien could not be scanned, you must modify the lien in AMSO manually. (Refer to Case Data Sheet #LGP-H1-6.1)

- **Ann Perry -** Ann Perry's primary physician, Dr. Catherine Steinborn, has filed a lien against Ann's case. You, the WCJ, issue an Order Allowing Lien and task your SLT to produce and upload a lien document with the WCJ's eSignature. You, the SLT, perform the task but, while viewing it in AMSO, realize that you entered $2,000 instead of $200. Correct the lien in AMSO and in MS Word. (Refer to Case Data Sheet #LGP-H1-6.2)
- **Jose Ortega -** Highland Hospital faxed a lien for their emergency treatment of Jose Ortega, but the fax was not legible. The scanning department asks you to manually create the lien.

  Turns out that because Highland Hospital was unable to successfully fax their lien for the emergency treatment of Jose Ortega, they tried filing via eForm for the first time. Because the eForm successfully generated a lien, there are now two liens for Ortega's emergency treatment. Delete one of the liens. (Refer to Case Data Sheet #LGP-H1-6.3)
- **Tsu Sing -** The helicopter that brought Tsu Sing to the hospital filed a lien against his case. The helicopter company, Hermanos Gomez, is based in Mexico, and their handwritten lien could not be scanned. The scanning department asks you to manually create the lien. (Refer to Case Data Sheet #LGP-H1-6.4)

Create a disposition

In AMSO you will record dispositions on a separate screen. You will include the type of disposition, the date, penalty amount if appropriate, and the reason for the disposition.

Note: *A hearing must be scheduled before a disposition can be created.*

Follow these steps to create a disposition in AMSO:

1. Click **Dispositions** in the left-hand navigation links of the Hearing Home screen. The View Disposition List screen opens.

2. Click **New Disposition.** The Create Disposition screen opens.

3. Select a disposition type from the Disposition drop-down menu. Allowable dispositions are:
   -- Hearing not held (No Show)
   -- Hearing not held (other)
   -- Adjourned
   -- Application Dismissed
   -- Pending Submission
   -- Submitted
   -- Continue
   -- OTOC
   -- Penalty Award Issued
   -- Penalty Award Disallowed

4. Click the **Calendar icon** to select a date to fill the Date field.

5. Enter information in the Penalty Amount and Penalty Issue Date fields only if appropriate.

6. Enter appropriate text in the Reason field.

7. Click **Save**. The View Disposition List screen reopens

Practice Exercises

Complete the scenarios listed below using your case data sheet.

- **Cynthia Jackson -** At the MSC, you, the WCJ, create a 5-page Pretrial Conference Statement. You then send the parties to the MST to schedule a trial. The attorneys agree on a date for the trial. Now you, the MST, schedule the trial. A notice of the trial is sent automatically to all parties. You, the SLT, enter the disposition into AMSO as *submitted.* (Refer to Case Data Sheet #LGP-H1-7.1)
- **Ann Perry -** During a hearing, you, the presiding judge, create a disposition taking Ann Perry's case off calendar. He provided documentation showing that her condition is worsening and wants to wait before proceeding. (Refer to Case Data Sheet #LGP-H1-7.2)

- **Joe Ortega -** During a hearing, you, the presiding judge, create a disposition awarding a penalty to the applicant in the Jose Ortega case. (Refer to Case Data Sheet #LGP-H1-7.3)
- **Tsu Sing -** During the scheduled hearing, you the WCJ, create a disposition for Hearing Not Held - No Show because the defendant did not appear. (Refer to Case Data Sheet #LGP-H1-7.4)

Complete a hearing

A hearing is recorded as *completed* in AMSO when it is held and is not adjourned to another date. That is, a decision can now be made on the case. AMSO will task the WCJ to create a decision

Follow these steps to complete a hearing in AMSO:

1. Click the **Complete Hearing** link in the Manage section of the Hearing Home screen.
2. Enter the time the hearing started in the Actual Start Time field.

Note: *Start and End Time* must *be entered. Any time a court reporter is present, these times must be accurate because they are used for court reporter statistics. When a court reporter is NOT present at a hearing, the times are less important because nothing is done with them.*

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3. Enter the time the hearing ended in the Actual End Time field.
4. Click the **Hearing Attendance** selection box adjacent to any hearing attendees who were present at the hearing.
5. Click **Save**. The Hearing Home screen reopens.

Note: A hearing will be *adjourned* instead of completed if it needs to be continued. For example, the hearing official can adjourn a hearing while in session in order to provide the appellant with more time to gather evidence. AMSO automatically creates tasks to ensure that the hearing case can proceed. It sends a scheduling task because another hearing must be scheduled before the case can proceed. It sends a reminder to the case owner if transcript requests exist for the case. Finally, it updates the attendance record for all attendees—witnesses, participants, appellant, third parties, interpreters, service suppliers, hearing representatives. The steps to adjourn a hearing are the same as to complete one except that you will click the **Adjourn Hearing** link in the Manage section.

Practice Exercises

Complete the scenarios listed below using your case data sheet.

- **Cynthia Jackson -** Now that the MSC is finished, you, the SLT, mark all attendees as present at the hearing, complete the hearing, prepare the Pretrial Conference Statement, and serve it on the parties. (Refer to Case Data Sheet #LGP-H1-8.1)
- **Ann Perry -** During the hearing, the WCJ took Ann Perry's case off calendar. Now you, the SLT, cancel the hearing, and then create the TOC disposition and serve it on the parties. (Refer to Case Data Sheet #LGP-H1-8.2)

Note: *Normally, notice goes out to all parties when a hearing is cancelled. You can waive this notification.*

- **Jose Ortega -** During a hearing, you, the presiding judge, create a disposition awarding a penalty to the applicant in the Jose Ortega case. You, the SLT, mark all attendees as present at the hearing, complete the hearing, and then create the disposition and serve it on the parties. (Refer to Case Data Sheet #LGP-H1-8.3)
- **Tsu Sing -** The WCJ is ready to issue an Order on Findings and Award in the Tsu Sing case and tasks you, the SLT, to complete the case in AMSO. Mark all attendees as present at the hearing, complete the hearing, and then create the disposition and serve it on the parties. (Refer to Case Data Sheet #LGP-H1-8.4)

Summary of LGP Hearing Case

The concepts presented in this module were:

- Hearing Case Home and Hearing Home screens
- Master and related cases
- Driver and companion Cases

The new tasks practiced in this module were:

- How to create a hearing case
- How to schedule, reschedule (continue), or view a hearing
- How to create or view and order
- How to create and invite a hearing representative to a hearing
- How to create, view, modify, and delete a lien
- How to create a disposition
- How to complete a hearing

Test your knowledge of LGP Hearing Case

Select the correct answer for the multiple-choice items below:

1. Which of the following must be done *before* scheduling a hearing?
   a. create a hearing case
   b. link WCJs to their location
   c. set up slots
   d. all of the above

2. Which of the following are part of completing a hearing?
   a. marking attendance
   b. making a transcript request
   c. setting up a task for the Hearing Reporter
   d. releasing any resources used during the hearing

3. When a hearing that was not held needs to be continued, you need to:
   a. reschedule it
   b. complete it
   c. adjourn it
   d. end it

4. You should identify a case as a Master Case when
   a. several cases deal with the same type of injury
   b. an injured worker has multiple cases with the same employer
   c. several workers have cases for the same incident
   d. any of the above

5. Hearing representatives
   a. can only be WCAB employees
   b. must be registered before they are invited to a hearing
   c. must pay their own fees
   d. may not participate in pre-trial conferences

6. During a hearing
   a. a WCJ can add notes to the case in AMSO
   b. a hearing representative cannot access reports attached to the integrated case
   c. a WCJ can schedule a conference
   d. a court reporter enters notes into AMSO

Appendix A: LGP hearing types

- Expedited hearing

- Lien Conference
- MSC
- Priority Conference
- Ratings Conference
- Status Conference
- Trial
- Vocational Rehabilitation Conference

Appendix B: LGP create lien reasons

- Attorney Fees
- Copy Service
- EDD
- Family Support
- Interpreter
- Living Expense
- Medical
- Medical-Legal
- Other
- Transport
- Wage Replace

Appendix C: Manual events (excluding Recon)

- Request to Withdraw Recon logged by <user name>
- Report & Recommendation for Disqualification logged by <user name>
- Report & Recommendation for Recon logged by <user name>
- Report & Recommendation for Removal logged by <user name>
- Order Granting Disqualification logged by <user name>
- Order Denying Disqualification logged by <user name>
- Withdrawal of Removal Accepted by Judge logged by <user name>
- Writ Filed logged by <user name>
- Notice of Intention logged by <user name>
- Formal Rating Request logged by <user name>
- Refund request denied logged by <user name>

Note: *Refer to Case Management for a discussion of manual events.*