



What's New & What's Next with Insurable Risk

SPEAKER

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VP, Product Management | Riskonnect

CONNECTING RISKS THAT MATTER



Forward Looking Statement

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What's New | Key Enhancements & Improvements



1

Intelligent Claims Processing (ICP) AI: Claim Predict for WC, Notes Summarization, Agentic Intake

2

3

4

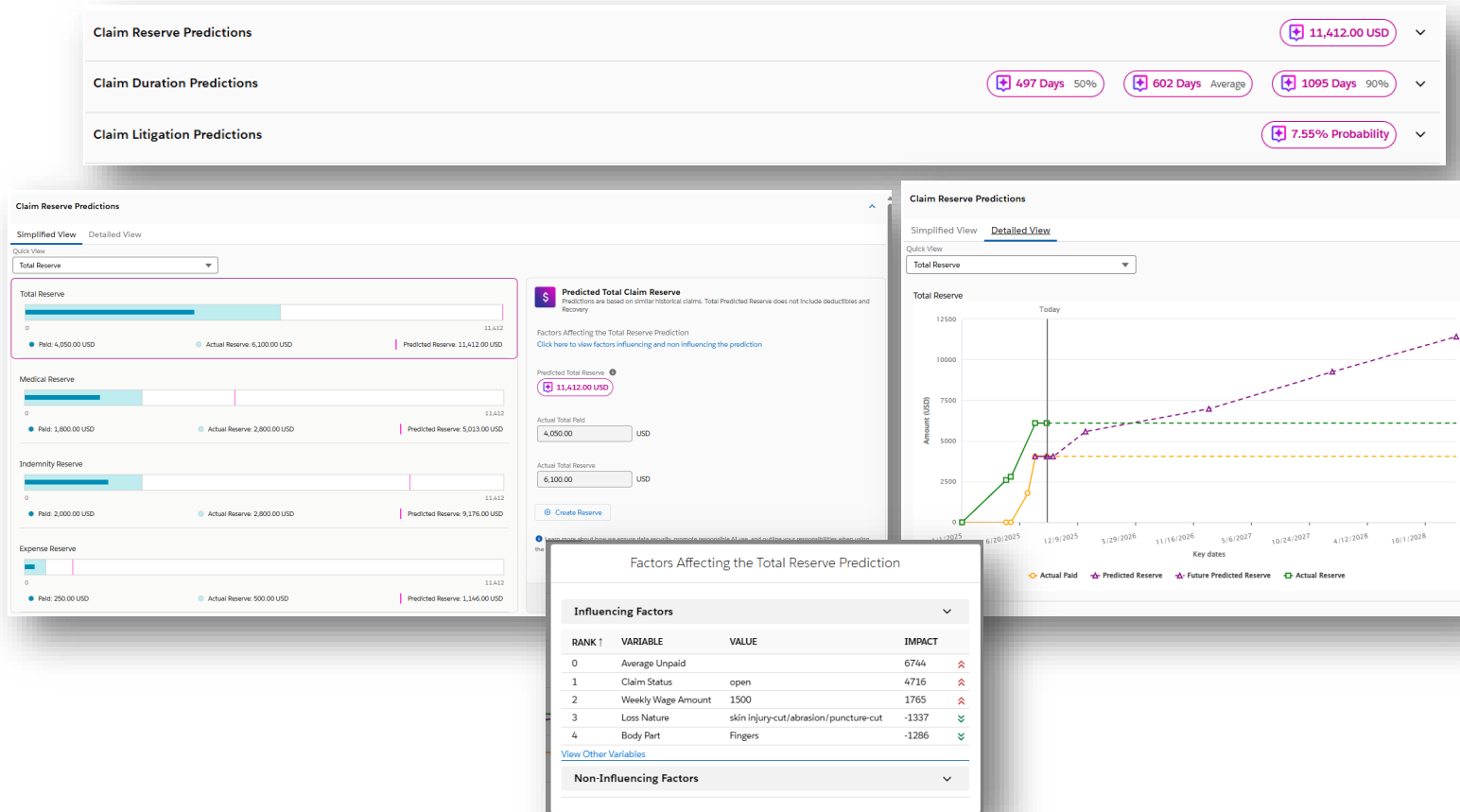
5





What's New

ICP AI: Claim Predict for Workers Compensation



Enable smarter decisions
for faster and more
efficient WC claims
handling and evaluation
with potential for
automation

INTEROPERABLE

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What's New

ICP AI: Notes Summarization for Claims



+ Generate Summary Notes

Summary

1. Summary:
The incident involves a worker's compensation claim due to an alleged slip and injury that occurred on June 11, 2022, at a store, where the claimant (clmt) reported slipping on a drink spill. The claimant has sought medical attention for injuries to both the left shoulder and ankle, including a shoulder surgery that requires follow-up physical therapy. There is significant uncertainty regarding the details of the incident, notably due to the absence of video evidence and incomplete medical information. The case has been reopened following communication from the claimant's attorney, and there is ongoing interest in gathering documentation related to the claimant's medical history and treatment plan.

2. Key Takeaway and Recommendations:

- **Video Evidence and Witness Statements:** Follow up with the store MOD or other employees to determine if any video footage exists that captures the incident and gather witness statements. This documentation is critical for establishing liability.
- **Engagement with Claimant's Attorney:** Maintain open communication with the claimant's attorney to gather comprehensive details regarding treatment, injuries, and medical documentation. Frame questions clearly to clarify any ongoing therapy and treatment expectations.
- **Documentation Submission:** Ensure the claimant is prompt in submitting the necessary medical records and any additional documentation, including photos of the incident and details of current treatment providers.
- **Assessing Reserve:** Given the potential cost of the shoulder surgery and ongoing treatment needs, continually adjust the case reserve. The reserve has been preliminarily set at \$20,000, but this should be revisited as more information is received.

3. Timeline:

- **June 11, 2022:** Incident occurs; claimant reports slipping on spilled drink. Claims injury to left shoulder and ankle.
- **Subsequent Days:** Claimant visits doctors; multiple visits reported, however, specific details regarding the treating specialists remain vague due to a lack of provided names and comprehensive records.
- **June 2022:** Claims management communicates with the GM and lawyer's office.

Simplify and accelerate claim reviews into a clear summary with key actions, recommendations, and timeline.

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What's New

ICP AI: Intake Agent



Home

Please note we are using AI to extract information from descriptions.

Sahil

Chat started by Guest • 14:06

Hi! I'm Incident Intake Agent, an automated assistant. I'm looking forward to helping you today.

Sahil • 14:06

Please describe the incident in a sentence. The more descriptive you are, the less questions you will need to answer.

Sahil • 14:06

For Example: "Jordan Moore tripped over and badly hurt her knee today, her email is jordan.moore@example.com."

Sahil • 14:06

Incident Report

0% Complete

Reply to the Sahil

Skip This Step

Cancel

Review & Submit

Incident Description*

Incident Date*

Incident Time (12 Hr Format)

Incident Time (12 Hr Format)

Reported by First Name

Reported by Last Name

Reported by Phone

Location

Occur on Company Premises*

Select an Option

Incident Address

**AI guided intake
simplifying processes,
improving accuracy, and
accelerating action**

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New Values Collection Tool for RK RMIS

3

4

5



What's New Values Collection Tool for RK RMIS



The screenshot displays the 'Renewal Portal' interface. At the top, a blue header reads 'Renewal Portal'. Below it, a grey box says 'Welcome to the 2025 Insurance Renewal' and 'Select a task from the list to see the details that needs to be completed'. A section titled 'Important information regarding your Insurance Renewal' is followed by 'My Open Renewal Tasks'. A table lists two tasks: 'QR-000232' (Completed) and 'QR-000241' (In Progress). The 'In Progress' task is selected, showing a sidebar with categories like General Information, Revenue, Public/Product Liability, Employee, Property, Motor, Travel, and Professional Liability. The 'Property' category is expanded, showing a 'Property Register' table with columns for Property ID, Property Name, Address Line 1, Postal Code, Country, Construction Type, Currency Code, and Building Value. The table contains three rows of data.

*Property ID	*Property Name	*Address Line 1	Postal Code	Country	Construction Type	*Currency Code	Building Value
US0002	Amarillo	400 S Tyler S...	79101	United States	Steel Reinf...	USD	2,500,000
US0001	Atlanta HQ	980 Interstat...	30339	United States	Steel Reinf...	USD	10,000,000
US0003	DataCentre	Atlanta		United States	Unknown	USD	
UK0001	Widget Fact...	12 Long Street	LE16 7UJ	United Kingd...	Steel Reinf...	GBP	3,000,000

Simplified configuration
and intuitive
questionnaires in the
updated Values
Collection tool

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OCR for COIs Updates

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What's New

OCR For Certificates of Insurance Improvements

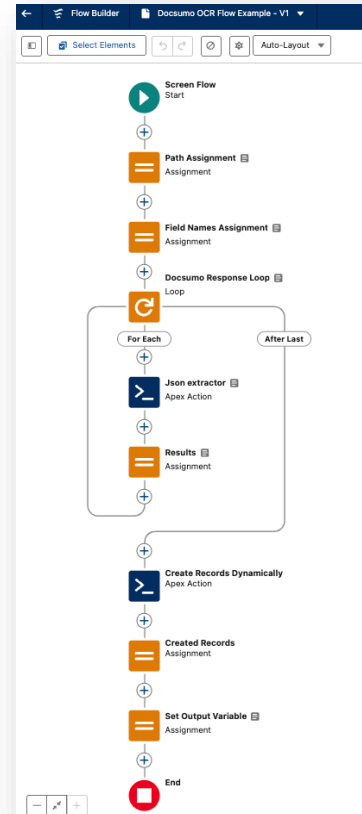
Upload

Select document type: Acord 25

Upload File
Upload Files Or drop files

	File Name	File Extension	File Type	Status
1	Acord 24 Insurance-Cert-Example	pdf	Acord24	
2	ACORD25 insurance-cert-example 2	pdf	Acord 25	

Cancel Set



Multiple file uploads for faster processing and seamless digital workflows

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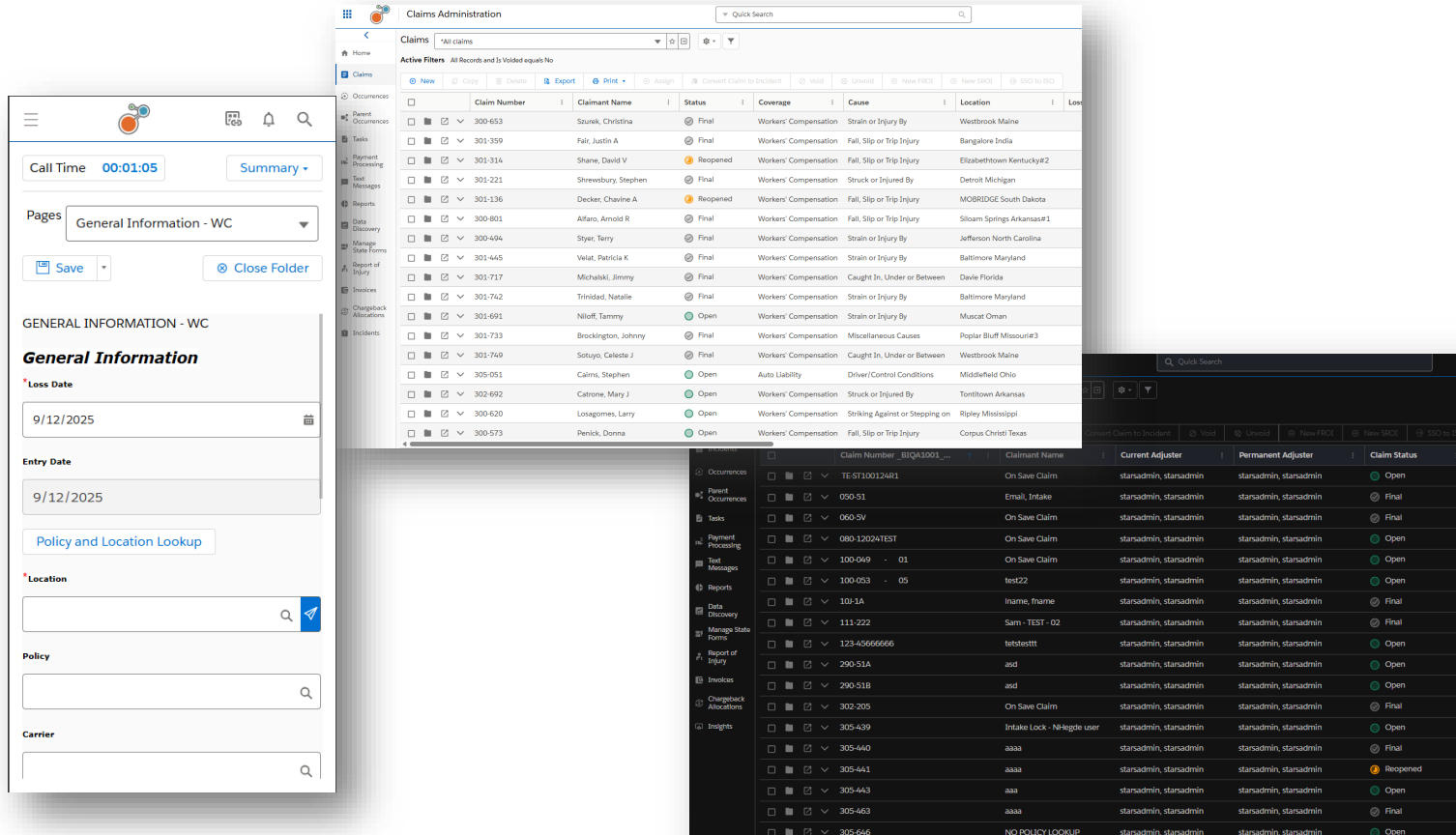
ClearSight UX / UI Modernization

5



What's New

ClearSight UI / UX Modernization



- Improved responsive design for small devices
- Modernized UI with icons and colors
- Personalization with font, dark mode, favorites

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ClearSight UX / UI Modernization

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EHS Standardized Content and Workflow Efficiency

- Don't forget to check out the release notes: [Customer Portal](#)



What's New

EHS Standardized Content and Workflow Efficiency



Industry Audits

Questionnaire Templates				
Search Templates				
Search Template Names <input type="text"/> Program Audit				
TEMPLATE NAME	DESCRIPTION	CATEGORY	ACCESS TYPE	PUBLISHED
Compliance - Respiratory Protection		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Powered Industrial Trucks		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Walking/Working Surfaces		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Electrical Wiring		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Portable Fire Extinguisher		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Electrical Protective Equipment		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Personal Protective Equipment (PPE)		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Hazard Communication (HazCom)		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Machine Guarding		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>
Compliance - Control of Hazardous Energy (LOTO)		Program Audit	All	<input type="checkbox"/> <input type="button" value="v"/>

Standard Checklists

Questionnaire Templates				
Search Templates				
Search Template Names <input type="text"/> Equipment Inspection				
TEMPLATE NAME	DESCRIPTION	CATEGORY	ACCESS TYPE	PUBLISHED
Weekly - Containers & Storage Areas		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Weekly - Emergency Equipment (Function Check)		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Pre-Use - Extension Cords & Panels		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Daily Pre-Operation - Cranes, Hoists & Slings		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Pre-Use - Respirators		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Pre-Shift - Scaffold Systems		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Monthly - Portable Fire Extinguishers		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Pre-Use - Harnesses & Anchor Points		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Pre-Use - Portable & Fixed Ladders		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>
Pre-Shift - Forklifts		Equipment Inspection	All	<input type="checkbox"/> <input type="button" value="v"/>

Reduced risk exposure,
streamlined compliance
alignment, and
strengthened safety
culture

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CONNECTING RISKS THAT MATTER





By the Numbers....



300+

new ideas
received

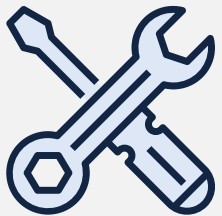
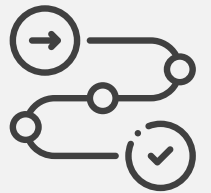


389

new features
delivered

67

% of
roadmap
based on
customer
ideas



250+

bugs resolved

26 # of releases



20+

performance
improvements

80

% of non-
maintenance
development



Insurable Risk: Force.com



INTEROPERABLE



Delivering a holistic view of risk through system integrations, data exchange, and semantic translation.

INTELLIGENT



Leveraging the power of AI to provide innovation in task automation, decision support, data aggregation, risk correlations, and content development.

FUTURE PROOF



Prioritizing user-centric design to deliver performant, scalable solutions that deliver exceptional value.

Near Term – 6 months



Enhanced Intake/ Agentic AI



Improved Standard Values Collection Tool



AI Driven Capabilities



Standardize Additional EHS Content



Enhanced Safety Capability

Mid Term – 6 –12 months



Enhanced Premium Allocation Module



AI Driven Capabilities



Riskconnect Insights Update



Enhanced Integration



Enhance Workflows / UX Experience

Long Term – 12+ months



Further Enhance EHS Evaluations



Continued Carrier Standard Integrations



Investigate Standardized Intake Approach Across Platforms



Insurable Risk: ClearSight



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Delivering a holistic view of risk through system integrations, data exchange, and semantic translation.

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Near Term – 6 months



Intelligent Claims Processing



UX Update for ClearSight



Supplemental Information (SIM) Enhancements



ClearSight Insights Roll Out



Contact Maintenance Improvement

Mid Term – 6 –12 months



Intelligent Claims Processing



Agentic Intake



UX Update for ClearSight



Accessibility compatibility with WCAG AA



Advanced MBRIP Integrations

Long Term – 12+ months



Intelligent Claims Processing



Ventiv Benchmarking Integration



Investigate Standard Intake Approach Across Platforms



Natural Language Querying



Insurable Risk: Ventiv Admin



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Near Term – 6 months



Automatic Dashboard Data Analysis (Policy)



Automate Submission of WCPOLS and WCSTAT reporting to NCCI (Policy)



Automatic Renewal Updates (Policy)



Implement Intelligent Claims Processing (ICP) AI (CE)



Switch from Rabbit MQ to API Integration (Policy & Billing)

Mid Term – 6 –12 months



Claims Administration AI Extended Capabilities (CE)



AI Workflow Implementation (Policy)



Natural Language Querying (CE)



Jasper 9 Upgrade (CE)



Combining Sticky Note and Document Image Tab (CE)

Long Term – 12+ months



Integrations with RK Systems (ALL)



Single FROI-SROI Compliance (CE)



Modify Dynamic Rating Engine (Policy)



Automate Policy Renewals (Policy)



Multi-Currency Payment Processor (Billing)



TPA Billing (Billing)



Insurable Risk: Ventiv Risk and Intake



INTEROPERABLE



Delivering a holistic view of risk through system integrations, data exchange, and semantic translation.

INTELLIGENT



Leveraging the power of AI to provide innovation in task automation, decision support, data aggregation, risk correlations, and content development.

FUTURE PROOF



Prioritizing user-centric design to deliver performant, scalable solutions that deliver exceptional value.

Near Term – 6 months



Dashboards and Analytics



Natural Language Querying



Enhanced Workflow/Document Handling



Enhance Security/Accessibility/Admin

Mid Term – 6 –12 months



Benchmark/Predict



New Chart Options for Advance Query



Enhanced Workflow/Document Handling



Standard Report & Dashboards



Geospatial Analytics

Long Term – 12+ months



Investigate Standardized Intake Approach Across Platforms



Continued Insurer Standard Integrations



Enhanced Insights



Expanding Intelligent Claims Processing for RMIS Needs



What's Next

ICP AI: Intelligent Document Processing



Size	AI Suggested Description
526 B	Mrs. Anita Sharma filed a health insurance claim for gallbladder surgery at Apollo Hospital, with expenses of INR 1,80,000 pending approval and awaiting medical verification.
2.2 KB (2253 bytes)	The documents detail various insurance claims including baggage loss, hospitalization, surgery, and vehicle accident, all currently under review, with pending approvals and ongoing verification processes.
2.67 MB (2798393 ...)	
672 B	The claim involves Mr. Ramesh Kumar's hospitalization for angioplasty with expenses of INR 3,20,000, currently under review due to pending verification of documents.
15.02 KB (15381 byt...	Apple Inc. is a leading technology company known for its innovative consumer electronics, software, and services, and has become the world's most valuable company with a broad product lineup and global influence.
291.28 KB (298274 ...)	India has a diverse sports scene, with cricket, kabaddi, and field hockey as major favorites, alongside traditional games like Kho-Kho and Mallakhamb, reflecting the country's rich sporting

Attachment Summary

The document details a health insurance claim filed by Mrs. Anita Sharma for gallbladder surgery performed at Apollo Hospital on September 2, 2025. The hospitalization lasted three days, with total expenses of INR 1,80,000. The claimed amount is INR 1,80,000, but approval is pending further review. The submitted documents include the discharge summary, operation notes, and billing receipts. The claim is currently awaiting verification from the medical team.

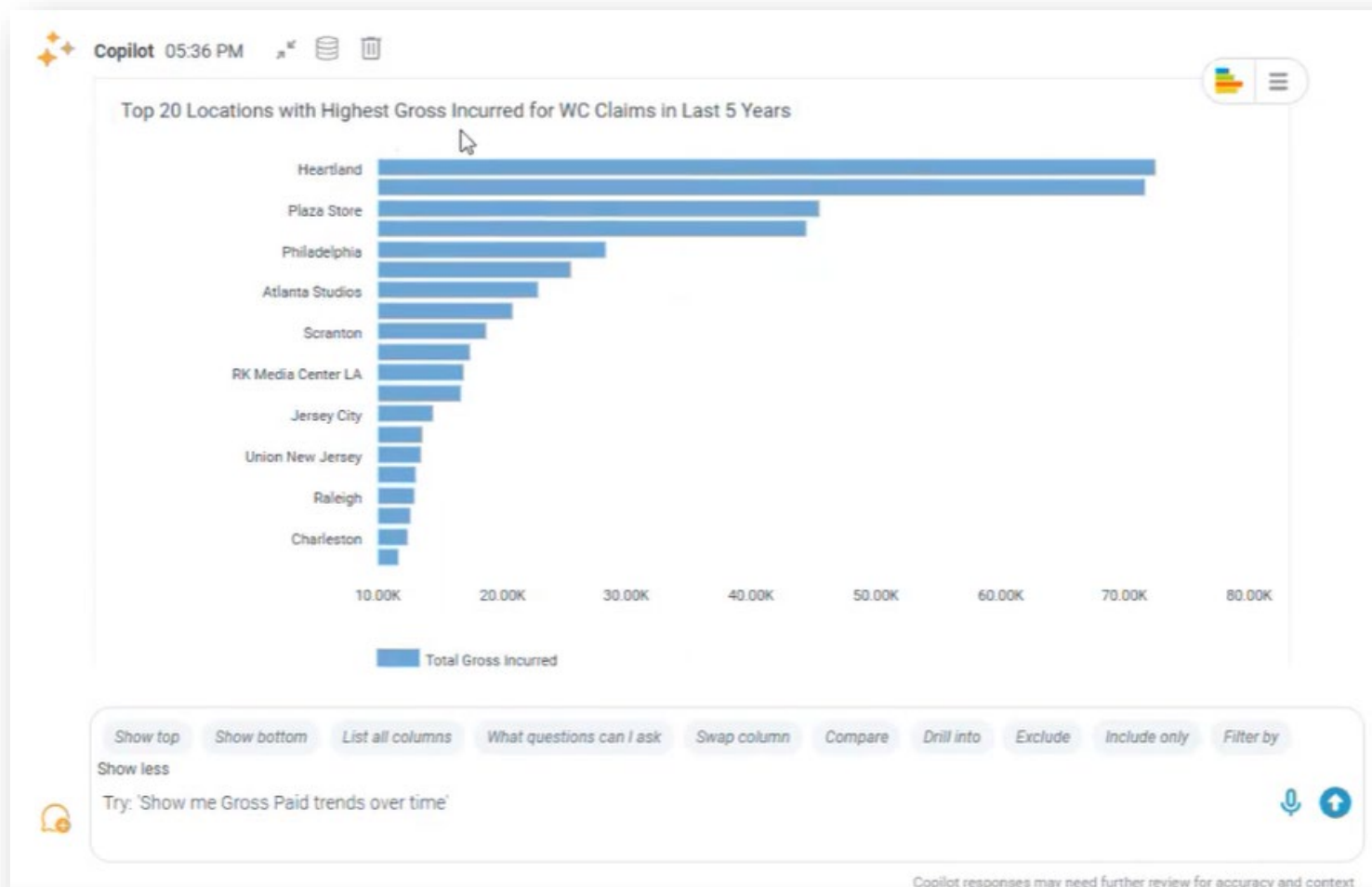
Key Points:

- Claim ID is CLM100001, filed by Mrs. Anita Sharma under policy number HLT20231234.
- The claim pertains to gallbladder surgery conducted at Apollo Hospital on 02-Sep-2025.
- Hospitalization duration was three days, with total expenses of INR 1,80,000.
- The amount claimed is INR 1,80,000, pending review and approval.
- Supporting documents attached include discharge summary, operation notes, and bills.
- The claim is awaiting verification from the medical team.

[Learn more about how we ensure data security, promote responsible AI use, and outline your responsibilities when using the generate attachment summary feature.](#)

What's Next

New AI: Natural Language Querying



What's Next

EHS: Bowtie and Additional Standardized Content



Visualize risk. Strengthen safety.

Expanding audit coverage



Identify hazards earlier

Strengthening BSA/JSA processes



Communicate risks more clearly

Richer visual risk assessments



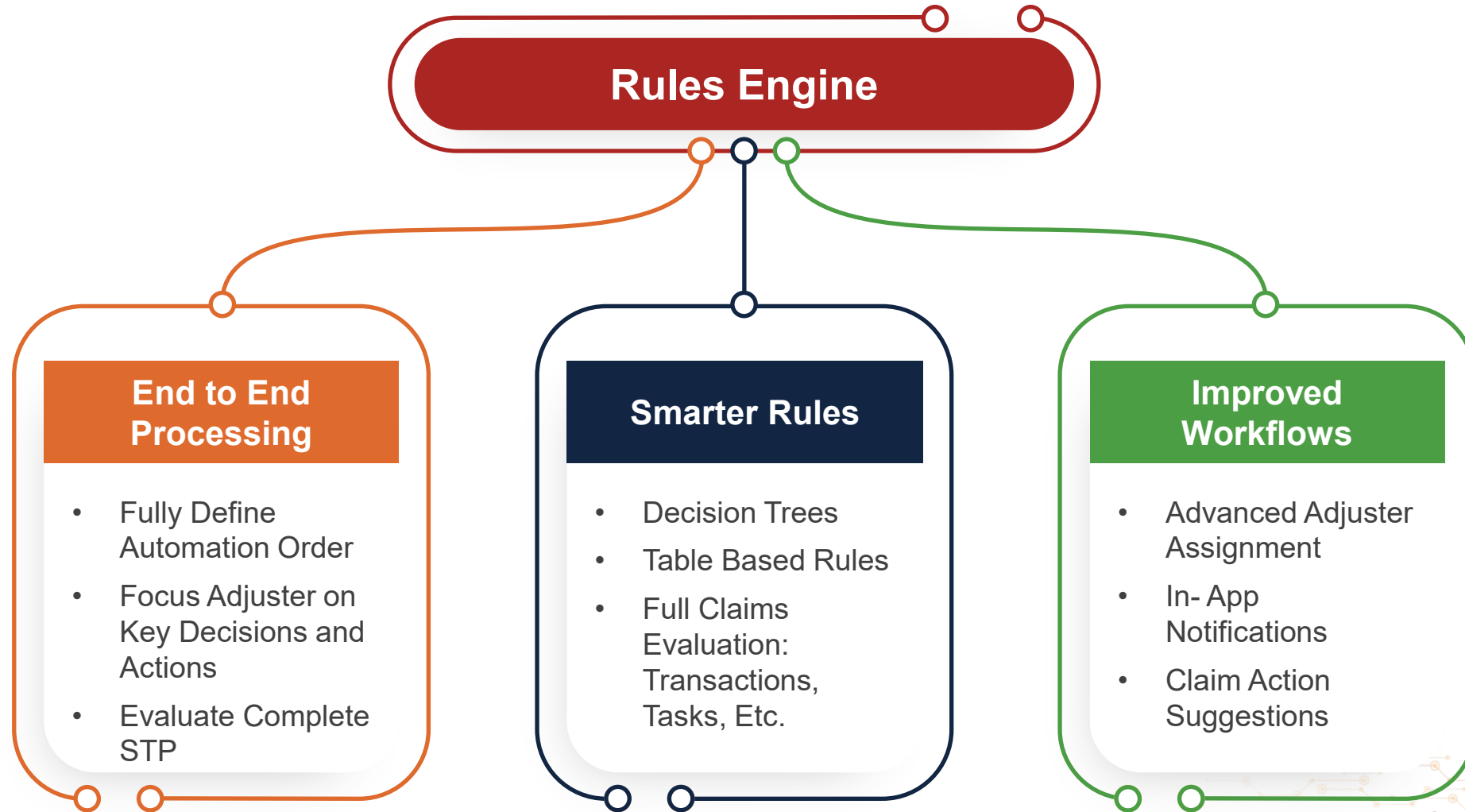
Drive proactive safety
decisions with confidence





What's Next

ClearSight ICP: Advanced Rules Engine



What's Next

ClearSight ICP: Advanced Workflow Visualizations



Claim Checklist
Lorem ipsum Lorem ipsum Lorem ipsum

Contact the Insured
2 of 2 Tasks Completed

Claim Details
3 of 3 Tasks Completed

Loss Date, Location & time ⓘ [Update](#)
Completed by John Dove on 07/11/2024 at 10:15 am

Insured policy and coverage details ⓘ [Update](#)
Completed by John Dove on 07/11/2024 at 10:15 am

Review claim information ⓘ
Completed by John Dove on 08/11/2024 at 09:15 am

Claim Investigation
0 of 4 Tasks Completed

Claim Financials
0 of 2 Tasks Completed

Claim Settlement
0 of 2 Tasks Completed

Notifications
09 Items

Notifications (5)

Updates (4)

Viewing

Sort By

All

Newest

New Claim Prediction | Claim: 202-354456-98555
New prediction is available for the claim. Look at the new prediction and take necessary action if needed.
5 min ago

Add Document | Claim - CMS-10245 (Gargery, Joseph P)
Add required document to complete the intake process with in 24 hrs.
[Upload Document](#)
5 min ago

New Critical Task | Claim: 125-354856-985
Establish initial reserve within next 48 hours.
5 min ago

New Adjuster Assigned | Claim: 142-854586-555
Ben White ([benwhite@riskconnect.com](#)) has been assigned as adjuster for this claim.
5 min ago

Add Document | Claim - CMS-10246 (Gargery, Joseph P)
Add required document to complete the intake process with in 24 hrs.
[Upload Document](#)
5 min ago

Add Document | Claim - CMS-10246 (Gargery, Joseph P)
Claim Info
Add required document to complete the intake process with in 24 hrs. Please find the list of documents required.
Required Documents

- [Document 1](#)
- [Document 2](#)
- [Document 3](#)

Action Center
Lorem ipsum Lorem ipsum Lorem ipsum

Action Center

Close folder

Tasks

Checklist

Today's To-Do

Time Left - 11:59:59

All Tasks

Document date, time and location.
Completed by Jhon Dove on 07/11/2024 at 10:15 am
[Update](#)

Insured Policy and Coverage Details
Completed by Jhon Dove on 08/11/2024 at 10:15 am
[Update](#)

☐

Upload driver license
⌚ To be completed in 11:59:59
[Upload](#)

☐

Set financial reserve for the claim
[Update](#)

☐

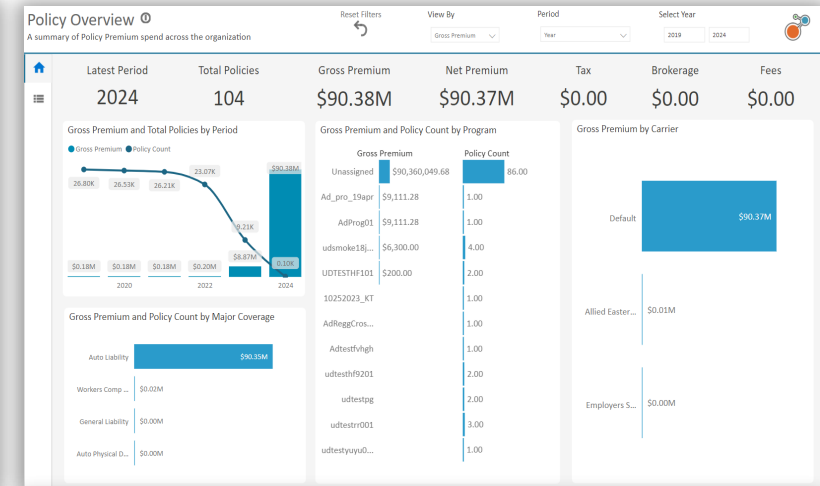
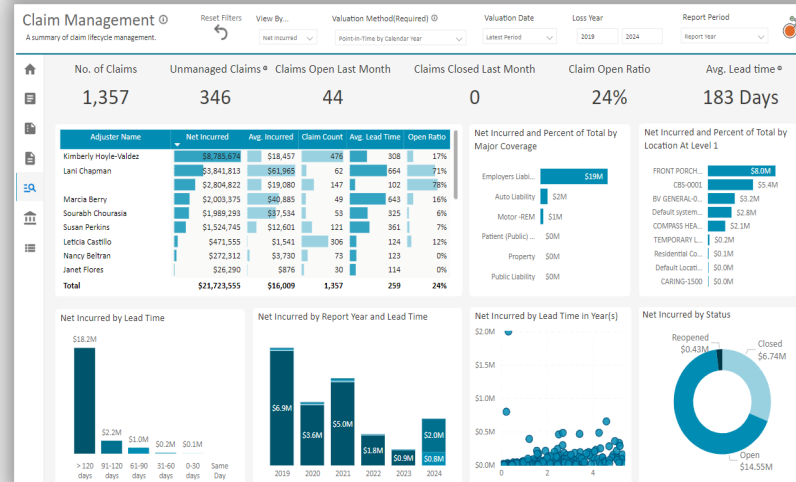
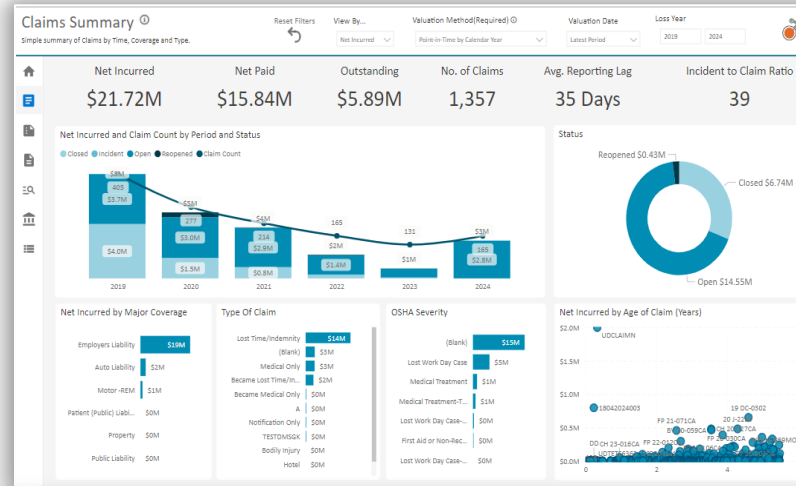
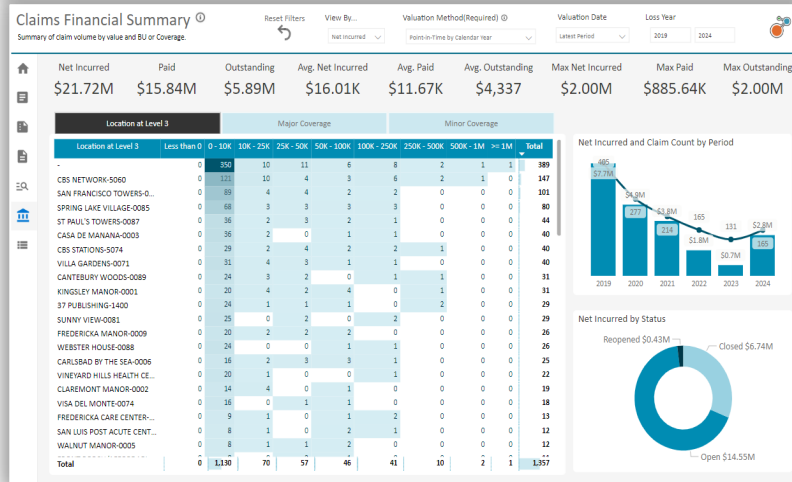
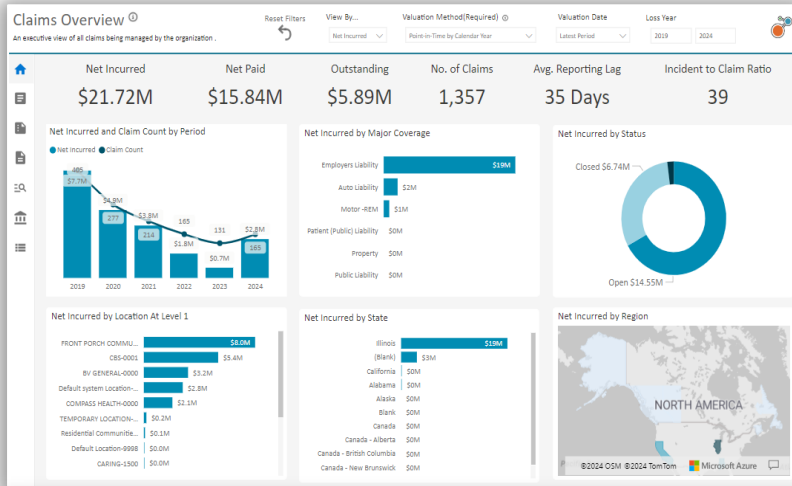
Upload medical bills
[Upload](#)

☐

Review claim prediction ⓘ
[Remove Task](#) [Review](#)

CONNECTING RISKS THAT MATTER

What's Next New Insights



Policy Listing

A listing of policies and associated details

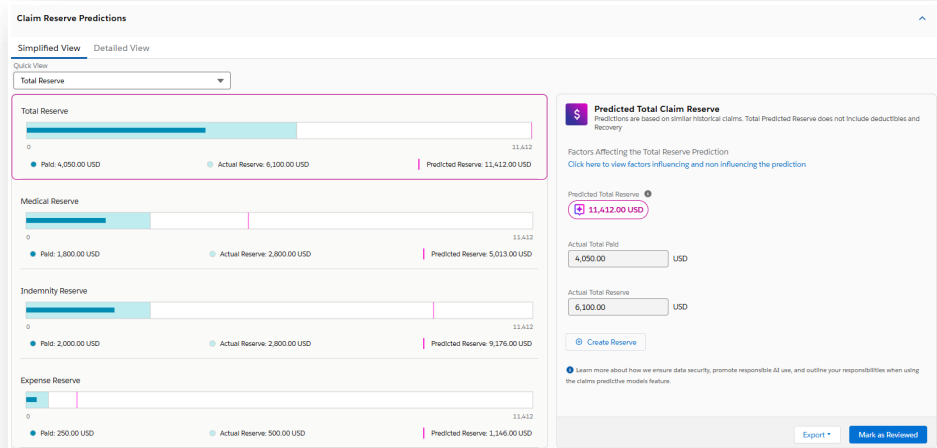
Policy Code	Policy Number	Policy Description	Program	Carrier	Effective Date	Expiry Date	Policy Status	Budgeted	Invoice	Paid
202002	POL_18		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000007		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000008		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000009		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000010		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000011		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000012		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000013		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000014		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000015		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000016		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000017		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000018		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000019		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000020		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000021		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000022		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
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202002	adp0000030		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
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202002	adp0000035		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000036		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000037		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
202002	adp0000038		Unassigned	Default	2024-02-29	2024-02-29	Inactive	\$0	\$0	\$0
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What's Next

Claims Enterprise: AI Features Coming Soon!



WC Claim Predict



Document Summarization

Attachment Summary

The document details a health insurance claim filed by Mrs. Anita Sharma for gallbladder surgery performed at Apollo Hospital on September 2, 2025. The hospitalization lasted three days, with total expenses of INR 1,80,000. The claimed amount is INR 1,80,000, but approval is pending further review. The submitted documents include the discharge summary, operation notes, and billing receipts. The claim is currently awaiting verification from the medical team.

Key Points:

- Claim ID is CLM100001, filed by Mrs. Anita Sharma under policy number HLT20231234.
- The claim pertains to gallbladder surgery conducted at Apollo Hospital on 02-Sep-2025.
- Hospitalization duration was three days, with total expenses of INR 1,80,000.
- The amount claimed is INR 1,80,000, pending review and approval.

Supporting documents attached include discharge summary, operation notes, and bills.

The claim is awaiting verification from the medical team.

[Learn more about how we ensure data security, promote responsible AI use, and outline your responsibilities when using the generate attachment summary feature.](#)

Notes Summarization

Latest Summary Notes

1. ****Summary:****

Scott Stapp, a forklift operator at SwiftFreight Logistics, reported a workplace injury on January 14, 2025, while unloading a shipment, resulting in a lumbar strain and a mild herniated disc. Following the injury, he was evaluated by medical professionals and received temporary disability benefits calculated at 66.67% of his Average Weekly Wage (AWW). He has been placed on modified duty that aligns with his medical restrictions and will continue to receive treatment, including physical therapy and potential steroid injections, as he recovers. A follow-up assessment is planned in 30 days based on further medical evaluations.

2. ****Key Takeaway and Recommendations:****

The key takeaway from Scott Stapp's situation is the importance of adhering to medical advice regarding work restrictions and the potential for progressive recovery through appropriate treatment methods. It is recommended that:

- SwiftFreight Logistics closely monitor Scott's recovery and compliance with the treatment plan.
- Regular communication with Scott should be maintained to ensure he is updated on his work status and monitored for any changes in his condition.
- A prompt follow-up with the spine specialist should occur, and any new medical reports should be evaluated to assess the need for further benefits or adjustments in duties.
- Continued collaboration with healthcare providers will be essential to facilitate a safe return to full-duty work.

3. ****Timeline:****

- ****January 14, 2025:**** Date of loss; Scott Stapp reported a workplace injury while unloading a shipment.
- ****Initial Evaluation:**** Scott was immediately assessed by on-site medical staff and later transported to urgent care, where he was diagnosed with a lumbar strain and possible herniated disc.
- ****Treatment Initiation:**** Work restrictions were implemented, and Scott was prescribed medications, advised to follow up in two weeks, and recommended light-duty work only.
- ****Temporary Disability Benefits Approved:**** Scott was approved for temporary disability benefits compensating 66.67% of AWW, effective while he is unable to perform full job duties.
- ****Medical Follow-Up:**** An MRI was ordered for further assessment, which later confirmed a mild herniated disc.
- ****Modified Duty Transition:**** Scott transitioned to a temporary inventory tracking and administrative support role within medical restrictions.
- ****Ongoing Monitoring:**** Follow-up confirmed adherence to the treatment plan with report of slight improvement; scheduled to begin physical therapy next week.
- ****Future Review:**** Claim to be reassessed in 30 days based on additional medical evaluations.

This structured timeline helps ensure that all parties are aware of Scott's progress and any necessary adjustments to his treatment or work role.





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- **Set up** a roadmap stewardship session
- **Sign up** for the product council
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Questions?

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Thank You!

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