Panel management is an essential practice for insurance carriers to ensure the right firm is assigned to each claims case. Insurers often rely on a large number of law firms to handle their substantial claims litigation caseloads and are constantly looking for ways to not only control their legal spend, but strengthen their relationships with their preferred outside counsel.

While all insurers practice some form of panel management, those that rely on technology to provide effective ways to capture key firm data points, delineate and organize their panels, and associate their panels to the correct matters have a clear advantage.

The data and functionality available in the Passport® Panel Management Module gives panel managers and claims executives the ability to create and manage panels and associate matters to those panels for case assignment. The module, available for Passport Claims Defense, impacts day-to-day case litigation management activities by supplying claims professionals with point-of-decision data and processes to ensure the right firm is paired with the right case at the right cost.

Because the Panel Management Module is part of the Passport ecosystem, all matter details, firm ratings, case outcomes, timekeeper rates, invoices and more are available within one system. Litigation and claims professionals can depend on Passport to provide the data and reporting necessary to make better decisions that affect the bottom line.
Passport® Panel Management Module

Key features of the Passport Panel Management Module include:

- Robust and intuitive panel management capabilities – create and manage panel criteria and member law firms
- Customizable panel attributes – Passport includes the default criteria of matter type, location, and/or practice area, and provides the ability for organizations to define their own panel attributes
- Panel(s) associated to matters – panels can be associated to matters that match the panel’s criteria, presenting claims professionals with a list of member firms to choose from for quick case assignment
- Automated firm approval workflow for non-panel firms – assigning a non-panel firm to a matter initiates an approval workflow, routing the firm through an approval process before they can be assigned to a case
- Timekeeper rate definition and billing rules enforcement – users are able to assign panel timekeeper rates by role and Passport automatically enforces panel billing guidelines during invoice review

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Create and manage panels using the Passport Panel Management Module administration utility

Assign matters to panel firms using the Passport Panel Management Module with law firm smart select ratings

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