WESTERN CONFERENCE OF TEAMSTERS LEGAL SERVICES TRUST FUND

P.O. Box 2340 | Stockton, CA 95201 | (209) 940-5250

November 25, 2015

To: Participating Panel Attorneys

Subject: Western Conference of Teamsters Legal Services Trust Fund
Updated SPD and Billing Errors

The Board of Trustees of the Western Conference of Teamsters Legal Services Trust Fund recently updated the Summary Plan Description (SPD). Enclosed with this letter is a copy of the SPD for your reference. If you would like an PDF version of the SPD, or a Spanish version, please send an email request to LST@deltafund.com.

The SPD outlines the benefit that is available to the participants. Section IV outlines the matters that are specifically excluded. Please take a moment to review this section.

Recently our office has come across some reoccurring issues in regards to invoices and obtaining claim numbers. In light of this, we would like to remind you of the following:

- Any billing statements which include a date of service that is more than five days before the claim was opened will be automatically denied. This will apply to the entire claim, not just the dates of service that occurred before the claim was opened. If the dates of service occur five days or less before the date the claim was opened, the Fund Office will issue payment along with a warning to the attorney. The Fund Office will track these warnings and inform the Board of Trustees once this becomes a reoccurring issue for any attorneys.

- Claim forms – All sections of the claim form must be completed. Claim forms are not needed for litigation, travel, or filing fee claim numbers. You do not need a signed claim form before you obtain a claim number. Once you obtain the claim number, you must get the form signed before you do any work. No payments can be issued on a claim without the claim form.

- Partnership Affidavit – **The only time** this form needs to be completed is when the person seeking the service is a domestic partner to the participant, or if the client is the domestic partner's child.

- Invoices – When you list the attorney initials next to each date of service on the invoices, please make sure they are printed clearly and easy to read. The attorney initials are for the auditor to determine which attorney performed the work, not for the attorney to verify they completed the work.

- Billing Participants – Attorneys are prohibited from billing members once a claim maximum has been reached. Panel Attorneys can only look to the Fund for payment and shall accept the amounts reflected in the Schedule as payment in full.

- Referrals to Another Attorney – If a participant contacts you and you are unable to assist them with their case, please do not refer them to another attorney unless you know that attorney is part of the Plan. Refer the participant back to our office and we will help them find a new attorney.

- Litigation Claims – There has been some confusion as to how litigation claims can be opened. All attorneys should have a copy of the Transaction Codes document which describes each benefit. The litigation benefit is described as:
  "If a live hearing with witnesses is required, and the fees for preparation and participation in the hearing exhaust the maximum benefit available, the Plan will pay a litigation benefit to help recoup some of the additional cost. The benefit will be paid at an hourly rate equal to 70% of the normal hourly rate. The Trust requires Panel Attorneys to maintain records confirming a live hearing with witnesses occurred."

If you have any questions or need another copy of the Transaction Codes and Fees document, please feel free to call us at the numbers listed below or send a request to LST@deltafund.com.

Sincerely,

Sarah Bagley
Account Manager
Delta Fund Administrators