

**VENUE SETTLEMENT**  
**WALKTHROUGH CHECKLIST**

## **Anaheim WCAB**

### Requirements:

- Completed walkthrough cover sheet
- Wait for clerk (1<sup>st</sup> floor) to check documents
- Proof of service
- Settlement documents
- Proposed Order Approving C&R or Award for Stipulations
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### Notes:

- If no case number, then settlement documents must be filed 24 hours prior to the walkthrough
- Clerk will assign the walkthrough judge
- Likely need a wage statement if applicant is less than a maximum earner

## **Long Beach WCAB**

### Requirements:

- Service of settlement documents on all parties prior to walking through
- Proof of service showing settlement documents served on all parties prior to walkthrough
- Settlement documents
- Proposed Order Approving C&R or Award for Stipulations
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### Notes:

- Likely need a wage statement if applicant is less than a maximum earner

## **Los Angeles WCAB**

### Requirements:

- Walkthrough documents shall be filed and served at least two weeks in advance of walkthrough
- Executed settlement agreement
- Medical record to support the settlement
- Proof that Applicant was provided notice of right to attend Panel QME (English and Spanish)
- Benefit print out
- Wage statement
- Benefit notices re: temporary disability, permanent disability, and supplemental job displacement benefits
- DEU rating (if available)
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### Notes:

- Depending on the WCJ, a *pro per* applicant must first see the Information and Assistance Officer who must acknowledge that the applicant understands the settlement
- Ability to select from four judges for walkthrough, rather than have clerk assign, per walkthrough day
- Likely need a wage statement if applicant is less than a maximum earner

## **Pomona WCAB**

### Requirements:

- Complete Walkthrough form given by clerk at window
- Original form and original C&R are given to clerk at window who then returns to DA
- Proof of service showing that settlement documents were served on all lien claimants prior to walkthrough
- Completion of a lien affidavit
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### Notes:

- Clerk assigns WCJ
- Typically will not approve a C&R until the EDD lien is resolved
- Likely need a wage statement if applicant is less than a maximum earner

## **San Bernardino WCAB**

### Requirements:

- Completed walkthrough cover sheet
- Submission of walkthrough cover sheet to window clerk
- Settlement documents
- Proposed Order Approving C&R or Award for Stipulations
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### Notes:

- If no case number, then settlement documents must be filed 24 hours prior to the walkthrough
- Likely need a wage statement if applicant is less than a maximum earner

## San Diego WCAB

### Requirements:

- EAMS Cover Sheet (with the box for walkthrough checked)
- Separator Sheet for each document (including proof of service, Minutes of Hearing, medicals, etc.)
- Proof of Service indicating everyone on EAMS to be served with walkthrough documents
- Completed EDD clearance form
- Completed San Diego County Child Support clearance form (can be located in EDD)
- Settlement documents
- Proposed Order Approving C&R or Award for Stipulations
- Medical report that settlement is based on
- Time stamp all documents (cover page, each separator sheet, and first page of each document under the separator sheet)
- Window 2 for request clearance for walkthrough and to select walkthrough judge
- Clerk will provide special walkthrough Minutes of Hearing
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### Notes:

- San Diego WCAB can issue an ADJ number on the same day of the hearing
- For *pro per* walkthroughs, WCJs prefer that Applicant has seen the Information and Assistance Officer or at least spoken to them over the phone, with some notation by the Information and Assistance Officer that the Applicant is sufficiently aware of settlement
- Utilize correct UANs on settlement documents or it will be kicked back
- Likely need a wage statement if applicant is less than a maximum earner





## **Santa Ana WCAB**

### **Requirements:**

- Completed walkthrough cover sheet
- Settlement documents
- Proposed Order Approving C&R or Award for Stipulations
- Place walkthrough packet in settlement document bin
- When completed, clerk will return walkthrough packet to bin and assign walkthrough WCJ
- Notice of right of PQME waiver, if settlement based on PTP, in English and Spanish (if applicable), if Applicant is *pro per*

### **Notes:**

- Likely need a wage statement if applicant is less than a maximum earner