


The following matrix shows the various roles associated with the level of access:

LEVEL OF ACCESS AVAILABLE FOR EACH INSURER ROLE				
	INSURER (PARENT) LEVEL	CHILD LEVEL	BRANCH LEVEL	ADJUSTER LEVEL
Organization Administrator	Yes	Yes		
Insurer User Administrator	Yes			
Plan/Invoice Manager	Yes	Yes	Yes	
Report Viewer	Yes	Yes	Yes	
Claim-Claimant Administrator	Yes	Yes	Yes	
Plan/Invoice Support	Yes	Yes	Yes	Yes
Plan/Invoice Adjuster	Yes	Yes	Yes	Yes

The following matrix shows the various tasks that are associated with each Insurer role:

INSURER ROLE MATRIX			
LEGEND	Management & Administrator Roles	Support Roles	Adjusting Role
ROLE	TASKS	NOTES	
<b>Organization Administrator</b>	View Insurer Management Update Insurer Update Insurer Status View Branch Create Branch Update Branch Update Branch Status View Adjuster Create Adjuster Update Adjuster Update Adjuster Status	The Organization Administrator is responsible for the setup and maintenance of the Insurer's organizational structure within HCAI.  This role can create and modify the Branch and Adjuster Team structure. It could be assigned to the same individual who performs the role of User Administrator.  An Organization Administrator cannot create new Insurers. Only the Help Desk can create new Insurers.	
<b>User Administrator</b>	View User Create User Update User Search for User Update User Status Reset Password	This role should be assigned to the individual who will be responsible for the setup and ongoing management of users in HCAI. It could be assigned to the same individual who performs the role of Organization Administrator, as domain assignments are part of the User Management functionality. Alternately, your organization may wish to segregate this duty from the Claims Department and have it reside within your corporate IT Help Desk operations.	
<b>Plan/Invoice Manager</b>	View Plan/Invoice Save work in progress for Plan/Invoice Review Plan/Invoice View Plan/Invoice EOB Search Document View Worklist View Plan/Invoice Tab View Search Tab Reassign Document Branch Search Claimant Unlink Claimant from a document Claimant Matching View Unmatched and Unassigned Documents in Worklist View Insurer Claimant Report Create and update Claim and Claimant Assign Adjuster from within a document or Claimant	The Plan/Invoice Manager role includes all tasks associated with the Plan/Invoice Support role.  Additional tasks supported by this role are: <ul style="list-style-type: none"> <li>• Reassign Document Branch</li> <li>• Unlink Claimant from a document</li> <li>• Claimant Matching</li> <li>• Assign Claimant to an Adjuster</li> <li>• Search for claimant</li> </ul>	

<b>Report Viewer</b>	View and print Insurer reports (Claimant and non-claimant report)	This role should be reserved for supervisors or managers as it allows “Adjuster” level (which could be individual) performance metrics to be viewed.
<b>Plan/Invoice Support</b>	View Plan/Invoice Save work in progress for Plan/Invoice View Plan/Invoice EOB Search Document View Worklist View Draft View Reports (Claimant Report only) Unlink and Match Claimant Reassign Branch	A support role for Plan/Invoice Adjusters.  It does not allow decisions to be recorded by the user.
<b>Claim-Claimant Administrator</b>	View Claim Create Claim Update Claim Search for Claim Deactivate Claim Activate Claim View Claimant Create Claimant Update Claimant Search for Claimant View Plan/Invoice Search for Document View Claims Tab View Search Tab View Claims Sub Tab View Claimants Sub Tab View Insurer Claimant Report Assign Adjuster	This role allows the user to manually create and manage claim and claimant information within HCAI  They may also view and print Plans and Invoices.
<b>Plan/Invoice Adjuster</b>	View Plan/Invoice Save work in progress for Plan/Invoice Review Plan/Invoice (To be deleted – same as View Plan/Invoice) View Plan/Invoice EOB Search Document View Worklist View Search Tab Initiate Need To Discuss Respond to Need to Discuss Request Amend Plan Withdraw Plan/Invoice Response Submit Pending Plan/Invoice Submit Plan/invoice Decision Update Plan/Invoice EOB View Insurer Reports. (Claimant Report only)	Plan/Invoice Adjuster includes all tasks associated with the Plan Support role.  It is the primary role required to be able to render decisions on the submitted OCF 18, 21, 22, 23 Forms.  Additional tasks supported by this role are:  <ol style="list-style-type: none"> <li>1. Initiate Need To Discuss</li> <li>2. Respond to Need to Discuss</li> <li>3. Request Amend Plan</li> <li>4. Withdraw Plan/Invoice Response</li> <li>5. Submit Pending Plan/invoice</li> <li>6. Submit Plan/Invoice Decision</li> <li>7. Update Plan/Invoice EOB</li> </ol>

 **Note:** Access is restricted to the organization structure. For example, an Adjuster who belongs to a Child Insurer may have access to his/her particular Child Insurer and other Child Insurers only if permission has been granted by the Parent Insurer.