

# Insurer Quick Start Guide for Administrators

## Manage Your Organization, Branches, Adjusters and other HCAI users

### MANAGE TAB

All changes to your company and user profiles are made in this tab.

### SECONDARY TABS

#### Insurer Management

- Company and branch Information
- Extracts and feeds
- Adjuster Information

#### User Management

- Set up new users
- Determine access levels for all users
- Reset passwords

#### Reports

Select and print detailed management reports:

- Outstanding and Pending Plans and Invoices
- Denied vs. Approved Plans
- Adjuster Summary

### OTHER INFORMATION

Click the [? - User Manual](#) button to access the HCAI Insurer User Manual.

Use the  in    feature to search quickly for all OCF forms associated with a specific claim.

The screenshot shows the HCAI Insurer Management interface for Crewe Alexandra Group. The top navigation bar includes tabs for PLANS, INVOICES, CLAIMS, SEARCH, and MANAGE. A search bar is present with a dropdown for 'All Forms' and a 'GO' button. A 'User Manual' link is also visible. The main content area is titled 'INSURER MANAGEMENT' and includes sub-tabs for 'INSURER MANAGEMENT', 'USER MANAGEMENT', and 'REPORTS'. A 'DEACTIVATE' button is prominently displayed. Below this, there is a section for 'Insurer Details' with a 'DEACTIVATE' button. The details form includes fields for Insurer Name (Crewe Alexandra Group), IBC ID (CAG\_01), Address (8 Sarah Street), City (Bruce Mines), Province (ON - Ontario), Postal Code (R0R 1C0), and Phone (705) 787-8488. There are also fields for Contact 1 and Contact 2 names, phone numbers, and email addresses. A 'Configuration Management' section follows, with radio buttons for various settings: Virtual Insurer?, Outbound Payment Feed?, Inbound Claim / Claimant Feed?, Outbound Insurer Extraction?, and Privacy Consent?. At the bottom, there is a 'Browse Branches' section with a table showing a branch named 'Riverdale' in 'Toronto' with an 'Active' status. A 'DEACTIVATE' button is next to the branch name. 'CANCEL' and 'SAVE' buttons are at the bottom of the interface.



## SETTING UP YOUR ORGANIZATION

Once you have gotten a username and password from the helpdesk, follow these steps to set up your organization in HCAI.

### ORGANIZATION

In the **Insurer Management** sub-tab:

4. Confirm your company's contact information.
5. Indicate which feeds and extracts your company is using.

### ADDING BRANCHES

In the **Insurer Management** sub-tab:

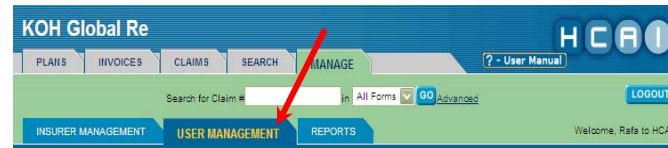
1. Click ADD NEW BRANCH.
2. Complete all relevant information for the branch.
3. Click SAVE.

All branches you set up will be listed at the bottom of the Insurer Management sub-tab.

### ADDING ADJUSTERS

In the **Insurer Management** sub-tab:

1. Click the name of the branch to which you want to add an adjuster or team of adjusters.
2. Complete all relevant information for the adjuster or team.



## SETTING UP USERS

In the User Management sub-tab, click on <ADD NEW USER>. (Existing users can be modified by clicking on their username.)

### LEVEL OF ACCESS

Select a level of access for the user:

#### Insurer...

Access to entire company, including branch information and child insurer information

#### Child Insurer...

Access to child insurer, including child insurers branches.

#### Branch...

Access only to user's own branch information

#### Adjuster...

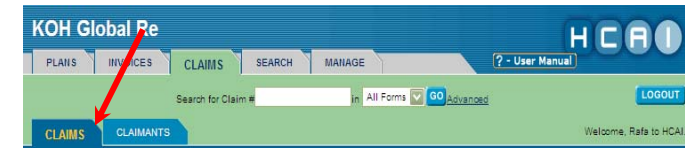
Access only to specific adjuster's or team's worklist

### ROLE

Select a role for the user.

<input type="checkbox"/> Claim/Claimant Administrator	<input type="checkbox"/> Plan/Invoice Manager
<input type="checkbox"/> Insurer User Administrator	<input type="checkbox"/> Plan/Invoice Support
<input type="checkbox"/> Organization Administrator	<input type="checkbox"/> Report Viewer
<input type="checkbox"/> Plan/Invoice Adjuster	

This will determine what functions the user is able to perform in HCAI. (Please see *Insurer Role Matrix* for more information).



## SETTING UP CLAIMS AND CLAIMANTS

This is the only administrative function that does not take place in the MANAGE tab.

### CREATING A CLAIM

1. Click **ADD CLAIM**.
2. Complete all relevant information for the claim.
3. Click **SAVE**.

Once a claim has been created, click **ADD CLAIMANT** to add claimants to the claim.

The screenshot shows the 'CLAIMS' sub-tab with the following sections:

- General Notification:** The following items need your attention. No records were found.
- Add a New Claim:** To add a claim into HCAI, click "Add Claim".
- Search for Claims:** Enter your search criteria and click "Search".
  - Claim #: [Text Field]
  - Policy #: [Text Field]
  - Date of Accident: [Dropdown Menu]
  - Policy Holder Last Name: [Text Field]  Exact Match
  - Policy Holder First Name: [Text Field]
  - Insurer: [Dropdown Menu]
  - Branch: [Dropdown Menu]
  - Claim Status:  Active  Deactivated