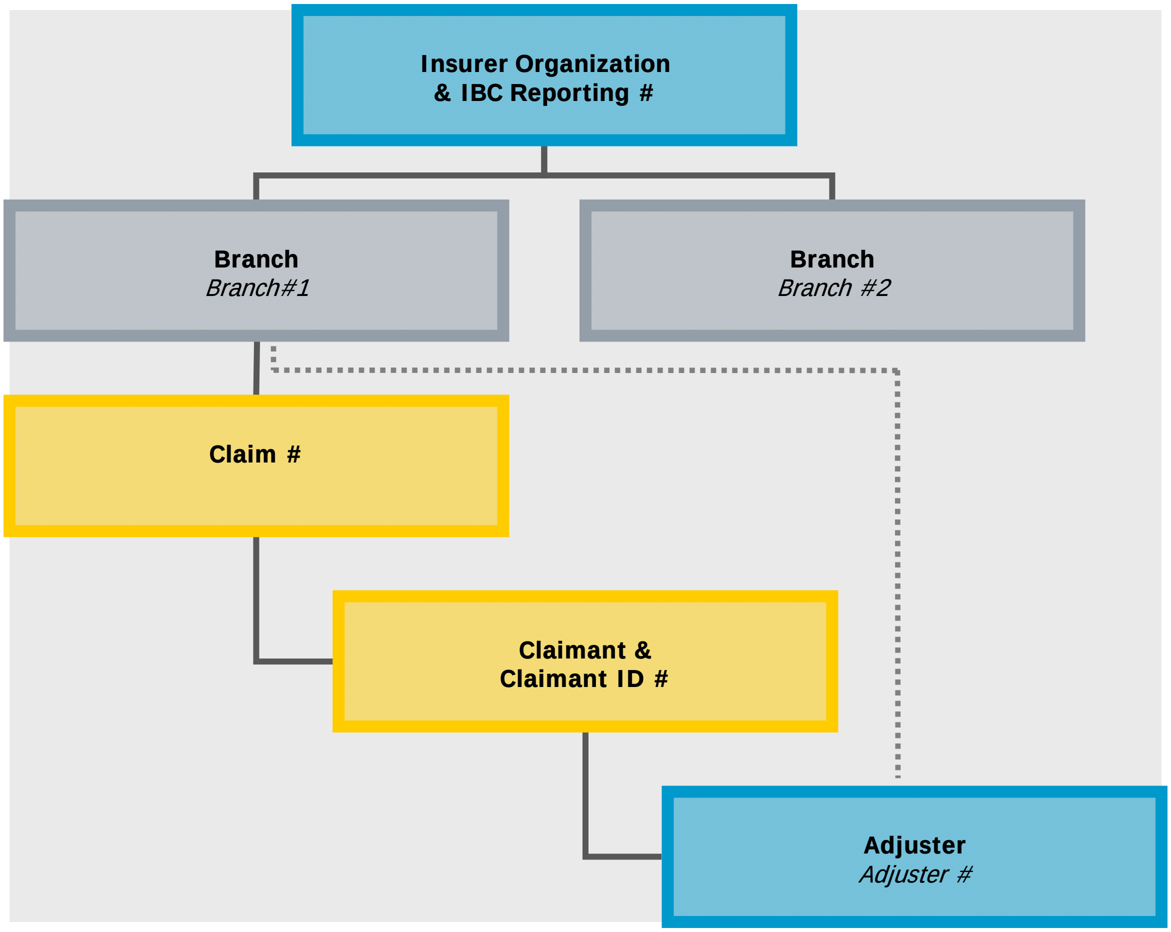
Did you know?

Transferring Claims and Claimants within the HCAI system

The HCAI system was built so that claims and claimants are associated with a specific Branch of the Insurance Organization.

Conceptually, the flow of information from the business perspective looks like this:



Once a claim has been created within a Branch, the claimants will be assigned to adjusters associated with the Branch.

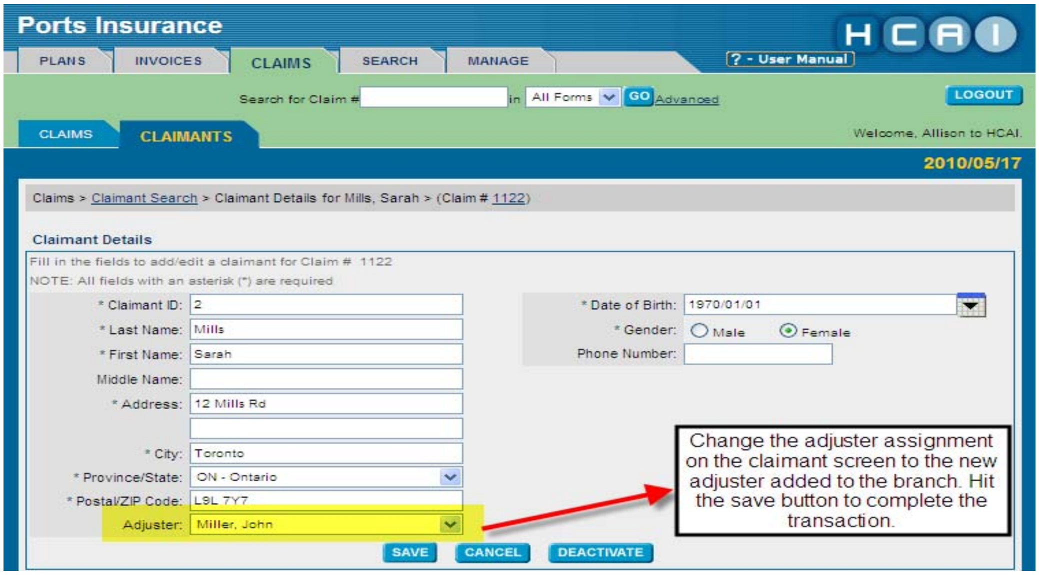
Claims and Claimants cannot be transferred from one Branch to another.

There may be times when Insurers need to have claims and claimants handled by an adjuster outside of the Branch to which the claim has been assigned.

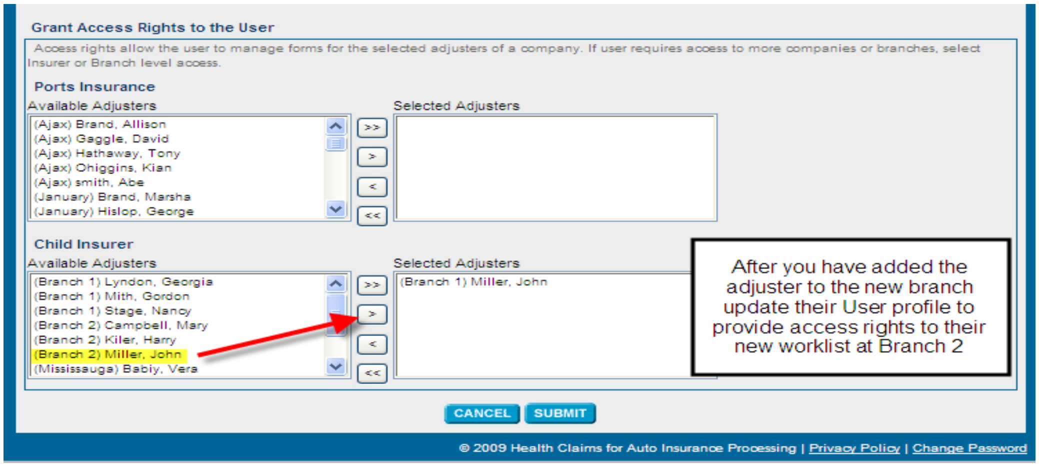
There are a several ways this can be accommodated in HCAI. The following pages describe three possible options.

Recommendation 1:

1. If Adjuster A from Branch 1 will be assisting in the handling of claims and claimants in Branch 2, you can add the Adjuster A to the list of adjusters available within Branch 2.
2. Once Adjuster A has been added as an adjuster to Branch 2, the claim can be reassigned to this adjuster via the *Claimant Details* screen.



3. Once the adjuster has been added to the Branch, s/he needs to be provided access to any claims and claimants to which s/he is assigned in Branch 2.
   a. Open the Adjuster A's user profile in HCAI – the user profile should show the adjuster with access to their own worklist in Branch 1.
4. To provide Adjuster A with access to Branch 2, you will modify Adjuster A's access to include his/her worklist in Branch 2.



5. Once Adjuster A logs into HCAI, s/he will be able to view his/her worklist for Branch 1 or Branch 2, or s/he may select the option that permits all plans and invoices for all Branches to be viewed.

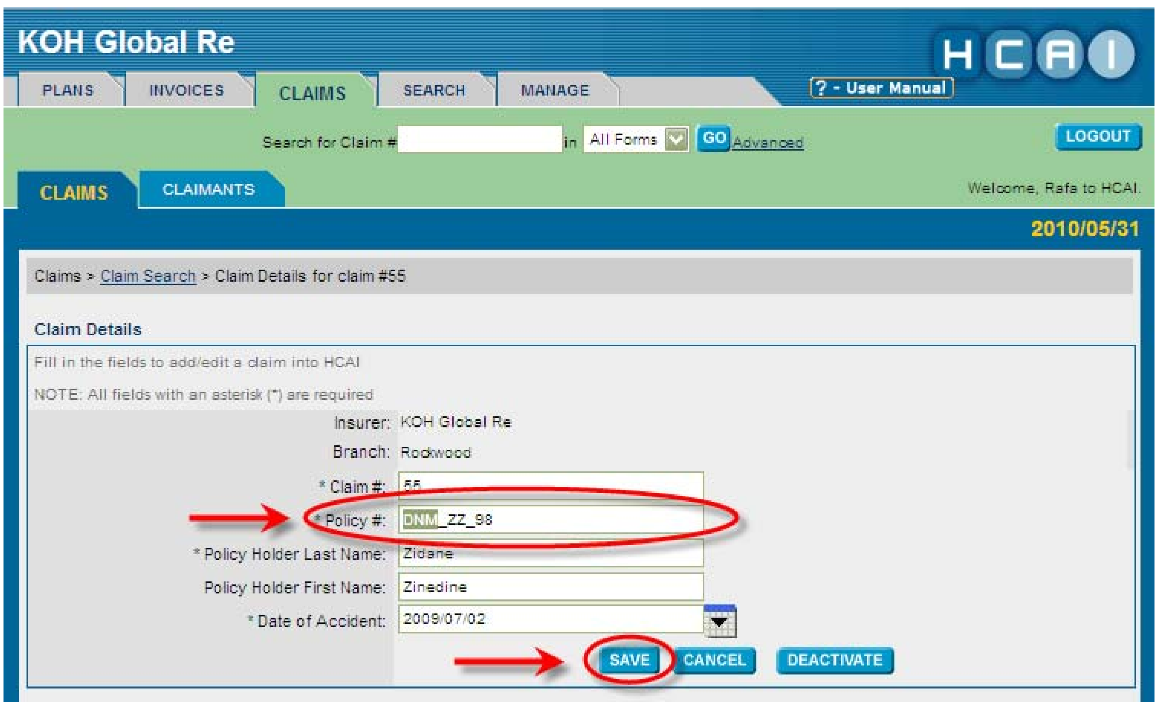
Recommendation 2:

Existing claims cannot be transferred from one Branch to another in HCAI as this functionality does not exist within the system. Existing claims also cannot be set-up again in a different Branch, as HCAI will recognize the details when a user attempts to save the claim and will then identify a duplicate claim error.

One work-around currently available is to modify the existing claim number.

1. An Insurer may choose to change the original number with a label or tag agreed upon in consultation with their IT department.

2. When modifying a claim using the HCAI web application, the User will change the claim number and then click the <Save> button. \



3. Once modified, the claim can now be set- up in the correct Branch without the duplicate claim error message being indentified by HCAI.

4. All forms associated with the original claim should be adjudicated and the claim and claimants should be deactivated from the originating Branch.

5. The new claim set-up in the new Branch will not carry any of the history (previously adjudicated forms) associated with the originating claim.

Recommendation 3:

The third recommendation would cause considerable work in the short term but if claims transfer between Branches are an unavoidable business flow, this recommendation may want to be considered.

The process involves the creation of a larger Branch structure to include the Branches that (may) regularly transfer information between themselves.

1. Choose the largest of the existing Branches; rename the Branch to signify the new grouping of Branches.

    a. For example, rename the Branch as a geographical region instead of a city Branch.
        i. To do this, go into the Insurer Management sub-tab;
        ii. Click on the largest Branch to open the Branch details;
        iii. Change the name and click the <Save> button.

2. Once the new Branch is created, you can add the adjusters from the other Branches into this Branch.

3. All forms outstanding should be adjudicated so that no outstanding forms in the old Branches exist.

4. All claims created in those Branches would need to be modified as per ***Recommendation 2*** so that the claims can be set-up in the newly created Branch.

5. The modified claims and claimants will all need to be deactivated.

6. Once all forms have been adjudicated and claim/claimant deactivated, then all adjusters within the old Branch(es) should be deactivated

7. When all the adjusters in the Branch are deactivated, the Branch can be deactivated.

8. All the adjusters from the deactivated Branches will need their user profiles updated.

    a. Search for each adjuster-user via the "Search for Users" section on the *User Search* screen found at Manage > User Management sub-tab.
    b. Once you have located the correct adjuster-user, click on his/her name.
    c. You are now at the *Add/Edit User* screen
        i. Scroll down the page to the "Grant Access Right s to the User Section"
        ii. Remove the adjuster-user's access to the deactivated Branch
        iii. Provide the adjuster-user with access to his/her worklist in the new Branch.