

HCAI – User Set-Up

There are certain key organization and user set-up criteria that all organizations require regardless of their size and structure.

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1. Organization and User Administrator

- 1.1. Every Organization requires a user with the User and Organization Administrator roles. A user with these roles is the first user created in the HCAI system. This user is created by the HCAI administrator in response to the submission of your enrolment forms.
- 1.2. A user with the User and Organization Administrator roles has the ability to create (and update) the insurer's organization structure, including company contact information, branches, and adjusters as well as setting up other HCAI users.
 - 1.2.1.1. The person with User and Organization Administrator role should always create a back-up User Administrator (UA) who can be called upon if the original primary UA suspends his or her password. A UA can reset every HCAI users' password when they become suspended except for their own--therefore the need for creating a back-up UA.
- 1.3. For Insurers with smaller structures, the Claims Manager or Accident Benefits Supervisor could be the person assigned to the User and Organization Administrator roles. It should be someone who has an overall view of the project and is overseeing the management of the HCAI program.
- 1.4. The User and Organization Administrator will be responsible for setting-up the organization and users in the HCAI system. As User and Organization Administrators will likely want to supplement the roles with which they are originally provided, the HCAI system allows a User Administrator to add additional roles to his/her profile. When User Administrators adds additional roles to their profiles, however, they will need to log-out of the system so the changes take effect.
- 1.5. Some additional roles that may be helpful to a User and Organization Administrator could be:
 - Plan/Invoice Manager
 - Report Viewer
 - Claim/Claimant Administrator
 - Plan/Invoice Adjuster
- 1.5.1. These additional roles would enable the Claims Manager, for example, to have a view of the entire organization and to assist staff with escalated operational support.

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1.5.2. Back-up User Administrator

- 1.5.2.1. The Claims Manager / Supervisor would be supported by an administrative person who could serve as a back-up to create new users and re-set passwords.
- 1.5.2.2. The person who is identified as the back-up User Administrator should be someone who is in the office daily. In a small organization this role may be assigned to a secretary or receptionist who is expected to remain at their desk during business hours. The consistent availability of this individual is required for the resetting of suspended passwords.

2. Claim/Claimant Administrator

- 2.1. The Claim/ Claimant Administrator is a key role for the entry of active Claim and Claimants information, and their corresponding assignment to Accident Benefits adjusters.
- 2.2. This role can be paired with the Plan/Invoice Manager role, which would allow the assigned user to also manage any unmatched forms that may enter the company branch. When a match cannot be found for a submitted form, the HCAI system places the form in an “unmatched” state until someone reviews the details, ensures the claim/claimant is owned by the insurer, and matches the form to a claimant then the form will appear on the adjuster’s worklist.

3. Plan/Invoice Manager - Report Viewer – Plan/Invoice Adjuster

- 3.1. The combination of the above roles is appropriate for a Supervisor or Specialist who oversees staff. The above roles will allow the user to monitor the branch bucket for response times to individual forms. In addition, s/he will have the ability to review specific adjuster reports. If a problem is escalated to his or her attention, the Plan/Invoice Adjuster role will allow the user to make adjudication decisions on particular forms.

4. Plan/Invoice Adjuster

- 4.1. Adjusters making decisions on forms must be assigned the Plan/Invoice Adjuster role. This role allows an adjuster to filter forms in their branch according to a particular worklist. Adjusters would usually be set-up to view their own worklist and perhaps that of a buddy.
- 4.2. Typically, an adjuster would not be given branch level access as this would not only expose the adjuster to all forms submitted to the branch but also not allow the adjuster to use the filter option to isolate his or her own forms. Branch level access for adjusters would only be appropriate for very small organization structures where claims are in turn handled by a very small team. If this is the case, there may not be anyone else available to set-up claim and claimants. In such circumstances the adjuster would be set up at Branch level with the following roles: Claim/Claimant Administrator and Plan Invoice Adjuster.

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5. Independent Adjusters

5.1. Independent Adjusters are viewed in the HCAI system as an extension of your in-house claims staff. If you outsource claims handling to Independent Adjusters, they should be added to your existing branches as an adjuster. Independent Adjusters should be assigned the Plan/Invoice Adjuster role. This role will allow Independent Adjusters to view and adjudicate forms for their claimants.

5.2. If an Insurer has a relationship with an Independent Adjusting firm such that they are responsible for the set-up and assigning of claim/claimants, there should be someone within the Independent Adjusting firm who is assigned Branch Level roles for the entering and assigning of Claim/Claimant data.

6. Insurer User Titles & the HCAI System

User Title	Level of Access	Roles & Responsibilities	Access Rights
Claims Manager	Insurer	Org. and User Admin. Plan/Invoice Manager Report Viewer Claim/Claimant Admin. Plan/Invoice Adjuster	No selection required (entire organization)
Management Support	Insurer	User Admin.	No selection req.
Claims Supervisor	Branch	Plan/Invoice Manager Claim/Claimant Admin. Plan/Invoice Adjuster	Branch must be selected
Claim Support	Branch	Plan/Invoice Manager Claim/Claimant Admin.	Branch must be selected
AB Adjuster	Adjuster	Plan/Invoice Adjuster	Adjuster Worklist must be selected and possibly a buddy worklist
Independent Adjuster	Adjuster	Plan/Invoice Adjuster	Access to their own worklist

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7. All claims adjudicated by an Independent Adjusting firm

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Claims Manager	Insurer	Org. and User Admin. Plan/Invoice Manager Report Viewer Claim/Claimant Admin. Plan/Invoice Adjuster	No selection required (entire organization)
Management Support	Insurer	User Admin. Plan/Invoice manager Claim/Claimant Admin.	No selection req.
Independent Adjuster	Adjuster	Plan/Invoice Adjuster	Access to their own worklist
Independent Adjuster	Adjuster	Plan/Invoice Adjuster	Access to their own worklist