

Claim-Claimant Management Quick Start Guide

UPDATING, ACTIVATING & DEACTIVATING CLAIMS

Above is what you will see when you first click on the Claims tab. The default setting is *Claims* tab, *Claims Search* sub tab. A claim can be created without a claimant, however a claimant must be created to match and adjudicate a form.

To add a claim:

1. Click on the "ADD CLAIM" button (The date of accident for a claim cannot be in the future).
2. The combination of Insurer (based on company ID), policy number, claim number, and date of accident must be unique.
3. Insurer and branch details of a claim cannot be modified once the claim has been created.

- A new version of the claim is created when the claim is updated, activated or deactivated.
- A claim can only exist in the inactive state if all the claimants associated with the claim are also in the inactive state.

As a consequence:

- A claim can not be deactivated unless all the claimants associated with it are FIRST deactivated.
- A claim must first be activated before any associated claimants are activated.

Claimant Name	Claimant #	D.O.B	Adjuster	Branch	In Dispute	Status
Kolbe, Maximilian	Max98	1918/11/30		Acton		Active

CREATING, UPDATING, ACTIVATING & DEACTIVATING

- To create a claimant associated with a claim, once the claim is created scroll past the Activity log and click on the "ADD CLAIMANT" button.
- The Claimant ID of a claimant is unique within a claim.
- Only an active adjuster can be assigned to a claimant.
- When a claimant is added or updated in HCAI, a check is performed against all unmatched documents (except those explicitly marked "Cannot be Matched") to try to match the document with the new claimant.
- A claimant can be deactivated only if all the documents associated with the claimant have been responded to (Approved, Partially Approved or Declined) by the adjuster.
- When a plan or invoice is matched to a deactivated claimant, the claim & claimant will be auto-activated.
- When an adjudication decision of a matched OCF is withdrawn, its associated claimant and claim will be auto-activated if it is in a deactivated state.

MATCHING – PERFECT MATCH

A **perfect match** between an applicant & a claimant occurs when *all four* of the following criteria are met:

1. The Date of Accident of the applicant matches the Date of Accident of the claim.
2. The Gender of the applicant matches the Gender of the claimant.
3. The Date of Birth of the applicant matches the Date of Birth of the claimant.
4. The Insurer on document identifying the applicant matches any of the following:
 - the insurer of the claimant;
 - the virtual child insurer of the insurer corresponding to the claimant;
 - the non-virtual child insurer of the insurer corresponding to the claimant;
 - the parent insurer of the insurer corresponding to the claimant;
 - the sibling insurer of insurer corresponding to the claimant.

AND, if one of any of the following criteria is met:

1. The Policy # of the applicant matches the Policy # of the claimant & the Claim # of the applicant matches the Claim # of the claimant.
2. The Applicant's Policy # matches the claimant's Policy # & the applicant's Claim # is blank.
3. The applicant's Claim # matches the claimant's Claim # & the applicant's Policy # is blank.
4. The applicant's Policy # matches the claimant's Policy # & the applicant's Claim # is not blank, and the applicant's Claim # does not match the claimant's Claim #.
5. The applicant's Claim # matches the claimant's Claim # & the applicant's Policy # is not blank, & the applicants Policy # does not match the claimant's Policy #.
6. The applicant's Claim # matches the claimant's Policy #.
7. The applicant's Policy # of the applicant matches claimant's Claim #.

Submitted Applicant

Last Name : Lampard
 First Name : Frank
 Middle Name :
 Gender : Female
 Date of Birth : 1978/06/20
 Address : 21 Hammers Way,
 City : Scarborough
 Province : ON
 Postal Code : M4W 1W1
 Claim Number : 777
 Policy Holder
 First Name :
 Policy Holder
 Last Name :
 Policy Number : CFF07
 Date Of Accident : 2009/09/08

Possible Match

There is no associated claim. [CREATE CLAIM](#)

Applicant cannot be matched with any claimant. Forward for adjudication [CANNOT BE MATCHED](#)

Last Name : Lampard [MATCH](#)
 First Name : Frank
 Middle Name :
 Gender : Female
 Date of Birth : 1978/06/19
 Address : 21 Hammers Way
 City : Scarborough
 Province : ON
 Postal Code : M4W 1W1
 Claim Number : 776
 Policy Holder
 First Name : Frank
 Policy Holder
 Last Name : Lampard
 Policy Number : CFF07
 Date Of Accident : 2009/09/08

[CANCEL](#)

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MATCHING – POSSIBLE MATCH

Submitted Applicant

Last Name : Lampard
 First Name : Frank
 Middle Name :
 Gender : Male
 Date of Birth : 1978/06/20
 Address : 21 Hammers Way,
 City : Scarborough
 Province : ON
 Postal Code : M4W 1W1
 Claim Number : 777
 Policy Holder
 First Name :
 Policy Holder
 Last Name :
 Policy Number : CFF07
 Date Of Accident : 2009/09/09

Possible Match

There is no associated claim. [CREATE CLAIM](#)

Applicant cannot be matched with any claimant. Forward for adjudication [CANNOT BE MATCHED](#)

[CANCEL](#)

When no perfect match is found for an applicant, either a single **possible match** or a list of **possible matches** is displayed. A claimant appears in the "Possible Match" list if **both** of the following two criteria are met:

- I. The insurer of the claimant is within the same insurer organization as the insurer on the document identifying the applicant **AND**,
- II. The claimant record matches the applicant record on at least three of the following four criteria:
 - (1) Gender;
 - (2) Date of Birth;
 - (3) Date of Accident;
 - (4) Either the Policy # or the Claim #.

Insurer users are then able to review the possible matches and select the claimant to which the applicant should be matched. If no possible matches are displayed in the "Possible Match" list, this indicates that there is no claimant record within the insurer organization that matches the applicant on at least three of the four numbered criteria mentioned above.