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Chapter 10: Insurer User Management

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User Management involves the set up and maintenance of individual users within HCAI. Users are assigned roles and domains within HCAI that define what a user can do and where they can do it. This chapter outlines the user management functionality in HCAI.

In HCAI, roles are defined as a set of tasks that a user can perform. Each task represents a user’s interaction with the HCAI web application. Domains specify where the task is performed or, more simply, the place within an insurer organization where the claim information is located. For more information on the structure of insurer organizations within HCAI, please see Chapter 9: Insurer Management.

The user administrator role is the only role allowed to access the user management module in HCAI. The User Administrator can create users, assign roles and grant domain access for organizations that he/she is allowed to manage. Once a user has been successfully created in HCAI, and e-mail will be sent to the user providing his or her user ID and temporary password (if the e-mail address has been provided). The user administrator must notify the user manually regarding his/her user name and password if no e-mail address is available.

Adding a user

Only those users assigned the user administrator role are able to view the user management tab and access the add user functionality.
1. Click the Manage tab on the HCAI home page
2. Select the User Management tab—the User Search screen opens
3. In the Add a New User section of this screen, click the **Add New User** button—the Add/Edit User screen appears
4. Fill out the form provided in this screen—fields marked with asterisks are mandatory

5. Enter the user’s last and first names in the respective fields
6. Enter the title of the user in the ‘Title’ field
7. Specify a user name for the user—once the submit button is pressed, this name cannot be edited. After this, it is read-only for the lifetime of the account
8. Enter Employee ID—this is assigned by the insurer
9. Enter the user’s phone number and e-mail address in the respective fields
10. Specify the level of access to be assigned to the user
Level of Access

There are four levels of access that can be assigned:

- **Insurer**: A user with the Insurer (parent) level access will be able to view details of all companies within the group—this level of access is usually assigned to users who are performing user administration, organization administration and plan/invoice manager roles
- **Child Insurer**: A user with child insurer level access will be able to view details for the selected companies—this access is normally assigned to users who perform the plan/invoice role
- **Branch**: A user with branch level access will be able to view details for the selected branches—this access is normally given to users who perform tasks for a number of branches
- **Adjuster**: A user with adjuster level access will be able to view details for selected adjusters

Once the level of access is determined, the roles and responsibilities sections will display the selections available and the grant access rights box will display the appropriate selections.
Assigning roles and responsibilities

Once you have selected the level of access, the screen will refresh with the available roles and responsibilities. The roles available for selection will coincide with the level of access chosen.

A list of insurer roles available within HCAI, along with a description of the tasks associated with each role is provided in the following table:

<table>
<thead>
<tr>
<th>Role</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurer User Administrator</td>
<td>View, create, update and search for users</td>
</tr>
<tr>
<td></td>
<td>Reset passwords</td>
</tr>
<tr>
<td></td>
<td>View the Manage tab and User Management sub-tab</td>
</tr>
<tr>
<td></td>
<td>Deactivate/activate users</td>
</tr>
<tr>
<td>Organization Administrator</td>
<td>View and update insurer</td>
</tr>
<tr>
<td></td>
<td>View, create and update branches</td>
</tr>
<tr>
<td></td>
<td>View, create and update adjuster profiles</td>
</tr>
<tr>
<td></td>
<td>View the Insurer Management tab</td>
</tr>
<tr>
<td></td>
<td>Deactivate/activate insurers, branches and adjusters</td>
</tr>
<tr>
<td>Role</td>
<td>Permissions and Tasks</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Plan/invoice manager        | View plans, invoices and EOBs  
Search for documents  
View work lists  
View the Plan, Invoice, Search, Claim, Manage tabs  
Reassign documents to a different branch  
View, create, search and update a claim  
View, create, search and update a claimant  
Unlink and match a claimant from a document  
View claimant reports |
| Report viewer               | View and print insurer reports  
View Manage tab and Reports sub-tab |
| Plan/Invoice support        | View plans and invoices  
Save work in progress for plans and invoices  
View EOB  
Search for documents  
View work lists  
View the Plan, Invoice and Search tabs  
View claimant reports |
| Claim-Claimant administrator| View, create, search and update claims  
View, create, search and update claimants  
View plans and invoices  
Search for documents  
View the Claims, Search and Manage tabs  
View claimant reports |
| Plan/Invoice adjuster       | View and submit responses to a plan or invoice  
Take and release document ownership  
Match claimant (if permitted by user’s level of access)  
View, create, delete and update the EOB  
Search documents  
View the Plan, Invoice, Search and Manage tabs  
Initiate ‘Need to Discuss’ functionality  
Respond to a ‘Need to Discuss’  
Withdraw a response on a plan or invoice  
View claimant reports |
| Claim-Claimant editor       | Search for and browse claim records  
Search for and browse claimant records (including viewing the ‘Associated Documents’ that display on the claimant details page)  
Edit claim and claimant records, except the ‘Adjuster’ assignment drop-down menu  
Deactivate and reactivate claim or claimant records  
Update the claimant details directly from a document |
Users can be assigned one role or multiple roles. The variety of roles available and the ability to assign multiple roles to a user provides insurers with the flexibility to narrowly restrict the tasks that some users are permitted to perform, while granting other users broad access to functions within HCAI.

To assign roles and responsibilities to the user, click on the box beside the role to be assigned.

**Grant Access Rights to User**

The appropriate selections will be available based on the level of access you have chosen for the user.

- **Insurer**: the user will have access to all information for the group of companies and no further input is necessary
- **Child Insurer**: Select the appropriate companies by clicking on the box beside the company name (this will only appear if the organization is set up as part of a group of companies with a child insurer)
- **Branches**: Select the appropriate branches by clicking on the box beside the branch
- **Adjuster**: You have two options for granting adjusters’ access:
  - Branch View: allows you to edit access to adjuster records by individual branch.
  - Email View: allows you to edit access to adjuster records consolidated by email address. If you choose this option, you will be prompted to search by adjuster name.

You can retain your above preference for next time by checking the ‘Remember my preference’ field.

Select the appropriate adjusters from the list—to select more than one adjuster, press the shift key and click on each Adjuster. Click the \( \rightarrow \) button to add the adjusters to the list. To select all adjusters, click the \( \rightarrow \rightarrow \) button.

To remove an Adjuster, select the name from the list and click the \( \leftarrow \) button. To remove all adjusters, use the \( \ll \) button.
Saving a New User

Click the **Submit** button at the bottom of the Edit User screen to save the user and his/her associated role and domain access in HCAI. A confirmation screen will appear. Review the assigned access and click **Submit**.

Once the user set up is confirmed, you are returned to the form with a confirmation message that states you have successfully added a new user and provides you with the user’s password. If the e-mail address is provided during user set up, the password is sent directly to the user.

If the data is invalid or incomplete, you won’t be able to save the user. If this happens, you will be returned to the form with an error message displaying the field name and the type of error.

Searching for a user

The User Search functionality is found in the User Management tab, which is accessible from the Manage tab on the insurer home page. Click the Manage tab. If the User Management tab is not the default selection, select it. The User Search screen displays.

In the search for users section, use any of the following search criteria:

- **User status**: Select one of the two boxes: ‘Active’ or ‘Deactivated’—if you know the status of the user you are searching for
- **Last name**: Enter at least one character in this field (when searching by first name, the user must specify the last name)
- **First name**: Enter at least one character in this field (when searching by first name, the user must specify the last name)
- **Employee ID**: If known, this search criterion returns the direct result
Click SEARCH. If there are any errors, an error message appears. Otherwise, HCAI will take you to the search results screen.

**Note:** All searches are performed with a forward wildcard. Thus, searching for “A” is effectively “A*”

### Viewing Search Results

The search results screen shows a list of users determined by your search criteria and associated with your organization.

The default sort order of users is alphanumeric ascending by Employee ID. If there are multiple search results, they are divided into several pages with the default number of line items displayed on each page restricted to 10.

To change the number of line items per page, select the number of items from the “View” drop down list.
To navigate in the multi-page search results:

- Click ‘Previous’ or ‘Next’ to move forward or backward through all the pages of the Search Results set.
- Use the page number links to move to a particular page of the search results

To refine your search:

- Click the “Refine Search text link—this returns you to the User Search screen
- Modify the data as required and click ‘Search’

To change the sort order of the search results list:

- Click on the “Employee ID” column header—this toggles the sort order from the default alphanumeric ascending to descending
- Click on the “Name” column header to sort the results in ascending order by the User’s name—click again to switch to descending order—the secondary sort order is alphanumeric ascending by employee ID
- Click on the ‘Status’ header to sort the results in ascending order by the status of the user—click again to switch to descending order

To view user details:

- Click on the user name link in the ‘Name’ column to proceed to the Add/Edit User screen
Download Search Report

This report enables a user to download results from the User Search > Search Results screen to an excel-friendly spreadsheet. The spreadsheet is a more detailed report than the web view of the search results and includes more information, such as the user name, email address, phone number and date of deactivation for each user appearing in the search results.

Updating a user

Search for a user as described in the Searching for a User section. In the search results list, click on the user name in the “Name” column. This brings up the Add/Edit user screen.

In this screen, you can edit the user details in the editable fields. You cannot edit the user name; it is only editable on the creation of the user account. After that, the user name is read-only for the life of the account.
To edit the level of access and roles:

1. Input the desired changes and press the submit button
2. The confirmation screen will display, review the changes
3. Press submit again-- a message will display that the user has been successfully updated

**Resetting user passwords**

When a user is suspended from HCAI, the User Administrator for the insurer can reset the user’s password by:

1. Click on the Manage > User Management tab
2. Search for the user and click on his/her hyperlinked name
3. Once the user is located, click on his or her name to open the profile
4. Hit the reset button located in the user’s profile
5. If the user’s e-mail is entered into their profile, the user will receive a temporary password via e-mail automatically—if no e-mail address has been provided, the user administrator must provide the user with the temporary password
Deactivating or reactivating a user

The deactivate/reactivate user functionality is found in the User Management sub-tab.

To deactivate a user:

1. Click on the Manage > User Management tab—the User Search screen will appear
2. Search for the user you wish to deactivate
3. In the Search Results screen, click on the user you wish to deactivate—the Add/Edit User Details screen will appear
4. Click the **DEACTIVATE** button to deactivate the user
5. The screen will refresh—the message ‘User Deactivated” appears and the **DEACTIVATE** is replaced with an **ACTIVATE** button
6. The user will no longer have access to HCAI—the user name cannot be reused in HCAI
If an Adjuster account has active claims/claimants attached to his or her profile, the user administrator should not deactivate the user. Active claims/claimants must either be deactivated or transferred to another adjuster before the user administrator can deactivate the user.

When a user administrator deactivates an adjuster by clicking the **Deactivate** button in the Add/Edit user screen of the User Management sub-tab, the User’s profile in the Associated Adjuster section of the Branch Details screen must also be deactivated.

Likewise, when an adjuster is deactivated by clicking the **Deactivate** button located in the branch details screen of the insurer management sub-tab, the user administrator must also deactivate the user in the add/edit user screen of the user management sub-tab.

To deactivate an adjuster from the Insurer Management sub-tab:
1. Ensure all claimants have been deactivated or reassigned to another adjuster in HCAI—adjuster profiles cannot be deactivated if they have active claims assigned to them
2. Click on the Manage > Insurer Management tab—the Insurer Details screen will appear
3. Click on the branch the adjuster is associated with—the Branch Details screen will appear
4. Scroll to the Associated Adjuster section at the bottom of the page and locate the adjuster you wish to deactivate
5. Press the **Deactivate** button next to the adjuster’s name
6. The adjuster profile has now been deactivated in this branch
7. Repeat this process for any branch the adjuster was associated with

To reactivate an adjuster in the Insurer Management sub tab:

1. Scroll to the Browse Branches section and click on the branch the adjuster is associated with—the Branch Details screen appears—set the ‘filter by’ to “All”
2. Locate the deactivated adjuster in the Associated Adjuster section
3. Click the **Activate** button located on the same line of the adjuster you wish to reactivate (next to the status column in the ‘Associated Adjusters’ section)
4. The screen refreshes and the Adjuster profile is now active
To reactivate a user in the User Management sub tab:

1. Search for the user you wish to reactivate
2. Click on the user’s hyperlinked name. This bring up the ‘Add/Edit User’ screen
3. Click the **ACTIVATE** button to reactivate the user. The screen will automatically refresh and a message indicating that the user has been reactivated appears—the **DEACTIVATE** button is replaced with the **ACTIVATE** button
4. The user will now have access to HCAI