



Health Claims for Auto Insurance

User Access and Roles

Agenda



- 1) Question and Answer period concerning Organization structure
- 2) Power Point presentation of Access and Roles
- 3) Live demo of Insurer User set-up

User Administration

- User Administration describes the set of functionalities related to the creation and ongoing maintenance of User information
- In order to use the functionality offered by HCAI, a User must be created and assigned specific roles and access rights in the system

User Roles



- A set of tasks that a User can perform
- Each task represents a type of User interaction within the HCAI application

Access



- Specifies the location of the information that a particular User can access within HCAI (i.e., the scope of the actions relative to a particular User's role)

Roles: Insurer Level

- Insurer Level Roles receive the highest level of access in HCAI
- When given a role, a User at the Insurer level will be able to access information for the entire organization:
 - Parent
 - Child Insurers
 - All Branches

Organization Administrator

- This role is responsible for the creation and maintenance of the Insurer Organization, Branches and Adjusters
- Users with this role will be able to view the Management tab and all the details contained within this section
- ***HCAI Suggestion:*** role could be assigned to Management level Accident Benefits claims personnel or someone with corporate level IT functions

Insurer User Administrator

- The User Administrator* has the ability to view, create, update and search Users, and reset User passwords
- ***HCAI Suggestion:*** role should be assigned to the IT Helpdesk

**This role is not available at the Child Insurer level.*

Desktop View: Insurer Level

What level of access do you want to give to user?

Assign Roles & Responsibilities to the User

Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.

Management & Administrator Roles

Organization Administrator Insurer User Administrator Plan/Invoice Manager

Report Viewer

Support Roles

Plan/Invoice Support Claim/Claimant Administrator

Adjusting Roles

Plan/Invoice Adjuster

When Insurer level access is selected all roles are available for selection.

Organization Admin. and User Admin. are available for selection when Insurer Level access is selected.

Roles: Child Insurer Level

- Allows the User to see information pertaining to the entire Child organization
- Organization Administrator Role is available at the Child Insurer level
- User Administration role is not available – this role is only available at the Parent Insurer level

Desktop View: Child Insurer Level

What level of access do you want to give to user? Child Insurer ▼

Assign Roles & Responsibilities to the User

Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.

Management & Administrator Roles

Organization Administrator Insurer User Administrator Plan/Invoice Manager

Report Viewer

Support Roles

Plan/Invoice Support Claim/Claimant Administrator

Adjusting Roles

Plan/Invoice Adjuster

The role of Insurer User Administrator is not available at the Child Insurer level. All other roles are available.

Grant Access Rights to the User

Access rights allow the user to manage forms for the selected insurance companies. If the user requires access to one company only, select Branch or Adjuster level of access.

HCAI Direct

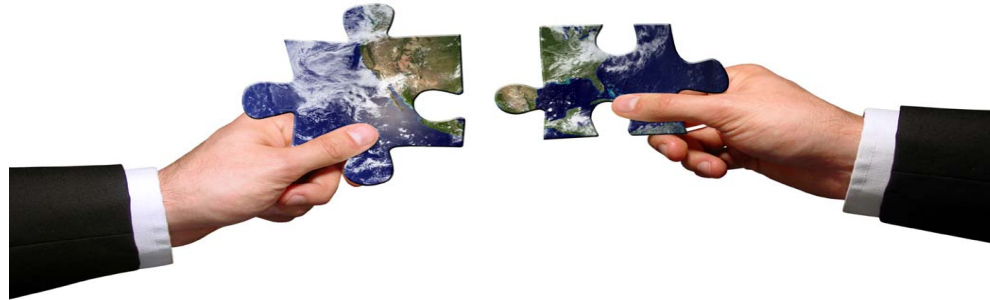
Access is limited to viewing only work related to the child insurer or other child insurers as selected. Access is not given to the Parent Insurer.

Roles: Branch Level

- Allows the User to view information at the Branch level*
- Users can have access to one or more Branches depending on the structure of their organization
- Access is restricted to the selection of Branches assigned to a particular User

**Branch level access does not allow the roles of User Administrator or Organization Administrator to be selected.*

Plan/Invoice Manager



- Able to view all Plans and Invoices for the Branch, reassign documents to another Branch
- View, search and update a Claim or Claimant, unlink or match a Claimant from a document
- ***HCAI Suggestion:*** role is suitable for Supervisors, Managers and persons assigned to monitor unmatched and unassigned Claims for selected Branches

Claim/Claimant Administrator

- View, create, search and update Claims and Claimants
- View all the Plans and Invoices submitted to the Branch to which s/he has access
- Search for documents
- ***HCAI Suggestion:*** assign this role to persons who manually create and manage Claim and Claimant information within HCAI

Desktop View: Branch Level

What level of access do you want to give to user? Branch

Assign Roles & Responsibilities to the User

Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.

Management & Administrator Roles

Organization Administrator Insurer User Administrator Plan/Invoice Manager

Report Viewer

Support Roles

Plan/Invoice Support Claim/Claimant Administrator

Adjusting Roles

Plan/Invoice Adjuster

Branch level access does not allow for the selection of Insurer level roles such as Org. Admin. and User Admin. These roles are greyed out and not available for selection.

Grant Access Rights to the User

Access rights allow the user to manage forms for the selected branches of a company. If the user requires access to multiple companies or selected adjusters, select Insurer or Adjuster level of access.

XYZ Insurance

Scarborough Toronto Markham

A User at branch level can access between one or more branches available. They receive access to all worklists for the branch.

CANCEL **SUBMIT**

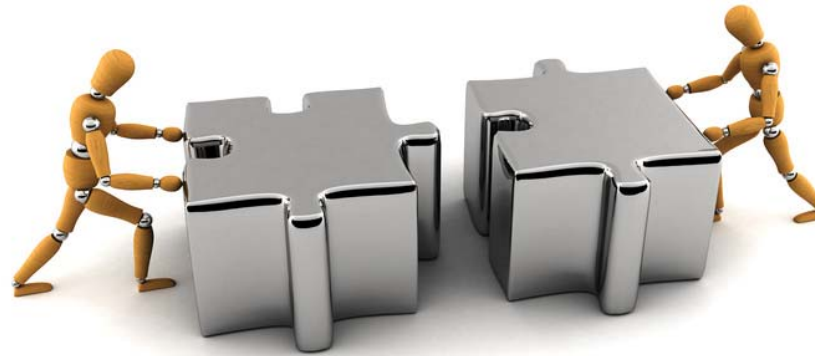
Roles: Adjuster Level

- Allows the User to either make the adjudication decision or support the adjudication decision
- Allows the User to view his/her own worklist and any other Adjuster's worklist that is selected
 - When a User is granted access to more than one Adjuster's worklist, s/he has the added ability to filter the worklist by the Adjuster s/he wishes to view

Plan/Invoice Adjuster

- User may view and submit response to a Plan or Invoice
- Save work in progress
- View, create and update the OCF 9 - Explanation of Benefits
- Initiate Need to Discuss, Respond to Need to Discuss, Request Amend Plan functionalities
- Withdraw Plan/Invoice Response, Place Plan/Invoice in Pending
- View Claimant Reports

Plan/Invoice Support



- The Support role allows Users to view the Plans and Invoices for the Adjusters to which they have been assigned
- Users can save work in progress, and they may view an OCF-9 (EOB), search for a document, or view Claimant Reports

Desktop View: Adjuster level

What level of access do you want to give to user?

Assign Roles & Responsibilities to the User

Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.

Management & Administrator Roles

Organization Administrator Insurer User Administrator Plan/Invoice Manager

Report Viewer

Support Roles

Plan/Invoice Support Claim/Claimant Administrator

Adjusting Roles

Plan/Invoice Adjuster

Adjuster level access only allows for the selection of Plan/Invoice adjuster and Plan/Invoice support.

Grant Access Rights to the User

Access rights allow the user to manage forms for the selected adjusters of a company. If user requires access to more companies or branches, select Insurer or Branch level access.

XYZ Insurance

Available Adjusters

- (Scarborough) Capon, Lisa
- (Scarborough) Earl, Liz
- (Scarborough) McPhee, Lenny
- (Scarborough) Reisling, Whitey
- (Scarborough) Shannon, Ryan
- (Scarborough) Shore, Marty
- (Toronto) Maybe, Donald

Selected Adjusters

Selected adjusters field allows the User Access to one or more adjuster's worklists. By moving the adjuster name to the Selected Adjuster box access is given to that worklist. Access can be given to one up until a maximum of all adjusters listed.



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Questions?