Insurer User Manual

Chapter 13:
Roles and Tasks

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The user structure in HCAI closely resembles the way the organization is structured. This clear structure ensures submitted forms are routed correctly.

The tables in this Chapter list the available roles and associated tasks for Insurer Users.

Level of Access

When setting up a new user, you will be prompted to answer the question 'What level of access do you want to give to this user?'

Depending on how your organization is set up, you will select one of the following levels of access from the drop down menu: Insurer, Child Insurer, or Branch/Claim Group. These selections correspond to the level of access permitted to that user.

The selection you make will determine what Roles and Responsibilities can be assigned to that user.

Roles and Responsibilities

Role	Task
Insurer User Administrator	➢ View, create, update and search User ➢ Reset passwords ➢ View the *Manage* tab and *User Management* and Team Management sub-tabs
Organization Administrator	➢ View and update Insurer ➢ View, create and update branches/claim groups ➢ View *Manage* tab and *Insurer Management* sub-tab

Team Administrator	➢ View, create, update and remove teams ➢ Search, add, update and remove users within a team ➢ Grant or revoke Team Editor permission within a team ➢ Grant or revoke Team Dashboard access within a team ➢ View Manage tab and *Team Management* sub-tab
Form Manager	➢ View Plan/Invoices ➢ View EOB ➢ Search for a document ➢ View Worklist ➢ View Unmatched and Needs Assignment worklist filters ➢ View *Plans*, *Invoices*, *Claims*, *Search*, *Reports* and *Manage* tabs ➢ Transfer unmatched documents between Parent and Child insurers ➢ Reassign claim branch/claim group ➢ View, create, search and update Claim ➢ View, create, search and update Claimant ➢ Unlink and match Claimant from a document ➢ View Claimant reports
Report Viewer	➢ View *Manage* tab and *Reports* sub-tab ➢ View and print insurer reports
Executive Report Viewer	➢ View *Manage* tab and *Reports* sub-tab ➢ View Executive-level reports only
Audit Report Viewer	➢ View *Manage* tab and *Reports* sub-tab ➢ View the User Activity Report only ➢ Available to users with Insurer level of access
Manager Dashboard Viewer	➢ Available to users with Insurer, Child Insurer and Branch/Claim Group level of access ➢ Access to the dashboard tab
Form Support	➢ View Plans and invoices ➢ View EOB ➢ Search for a document ➢ View a worklist ➢ View *Plans*, *Invoices* and *Search* tabs ➢ Claimant Reports
Claim-Claimant Administrator	➢ View, create, search and update Claims ➢ View, create, search and update Claimants ➢ View Forms ➢ Search for Documents ➢ View Claims and Search Tabs ➢ View Claims and Claimant sub-tab ➢ View Claimant reports

Form Adjuster	➢ Ability to take ownership of claimant files (with Claimant File Owner role assigned) ➢ View and submit response to Forms ➢ Save work in progress for Forms ➢ View, create and update EOBs ➢ Search for a Document ➢ View Plan, Invoice, Claims, Claimants and Search Tab ➢ Search for and view claim records in read-only mode ➢ Search for and view claimant records in read-only mode ➢ Initiate Need to Discuss ➢ Withdraw Plan/Invoice Response ➢ Match claimant (for users with Insurer, Child Insurer or Branch/Claim Group level of access) ➢ View Claimant reports
Claim-Claimant Editor	➢ Search for and browse claim records ➢ Search for and browse claimant records ➢ Edit claim and claimant records (except the 'File Owner' assignment drop down menu) ➢ Deactivate and reactivate claim or claimant records ➢ Update claimant details directly on a document ➢ View Claimant reports
Claimant Search Results	➢ Able to use the "Download Report" button on the Claimant Search Results page
Document Search Results	➢ Able to use the "Download Report" button on the Document Search Results page