Insurer User Manual

Chapter 9:
Insurer Management

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Insurer Management is used to create an organizational structure, or domains, within HCAI that are closely linked with and support the roles assigned to individual users. Insurer organizations are structured using entities arranged in a hierarchical format:

Insurer (parent) > Insurer (child) > Branch(es)/Claim Groups

This Chapter outlines the setup and maintenance of Insurer organization structures within the HCAI system.

A clearly expressed organizational structure in HCAI ensures that Plans and Invoices submitted by Facilities are routed and assigned to the correct Insurer and Branch/Claim Group.

An Insurer is defined within HCAI as an entity that insures the policyholder and owns any claim information generated by the policy. A parent Insurer is one that is comprised of several subsidiary organizations (child insurers), each of which functions as a distinct insuring entity. Each Insurer can be associated with one or multiple Branches/Claim Groups. A child Insurer that can use only the Branches/Claim Groups associated with its parent Insurer, and does not have any Branches/Claim Groups of its own, is classified as a "virtual Insurer."

A Branch/Claim Group is a way for insurers to group all claims with the same access restrictions. Once this grouping is done, it becomes easier to manage users' access to claims by either granting or restricting each user's access to the claim group, if required. Branches/Claim Groups are subsets of Insurers; a Branch/Claim Group can belong to only one Insurer.

Only a user with the role of Insurer Administrator has access to the Insurer Management module of HCAI. HCAI provides the functionality to create, view, update, deactivate, and reactivate Insurers and Branches/Claim Groups.

General Business Rules

The following business rules apply to Insurer and Branch/Claim Group management at all times:

- An Insurer can be associated with zero or more Branches/Claim Groups
- A single Insurer must have at least one Branch/Claim Group
- An Insurer can be specified as a parent or child Insurer
- A child Insurer that uses only Branches/Claim Groups associated with its parent Insurer, and does not have any Branches/Claim Groups of its own, is categorized as a "virtual Insurer"
- A Branch/Claim Group cannot be added to or associated with virtual Insurers
- A Branch/Claim Group cannot be deactivated until all claims are deactivated or transferred into a different claim group
- An Insurer cannot be deactivated until all Branches/Claim Groups belonging to the Insurer are deactivated
- A deactivated Insurer or Branch/Claim Group cannot be referenced in new Plans and Invoices created in HCAI
- Plans and Invoices cannot be submitted to a deactivated Insurer and Branch/Claim Group
- An Insurer must have a unique IBC reporting company number
- All activated Branches/Claim Groups belonging to an Insurer must have a unique Branch/Claim Group identifier

Insurer Branch/Claim Group Management

This section describes how to search, add, update, deactivate and reactivate Branches/Claim Groups of an Insurer.

The Insurer Branch/Claim Group Management functionality is found in the Insurer Management subtab, which is accessible from the Manage tab. Click on the Manage tab. If the Insurer Management sub tab is not the resulting default selection, select it. Depending on either on your organization type or your role and corresponding access privileges, you may see the "Select Insurer" drop-down list, which contains one or more Insurer companies at the top of the page. Selecting an Insurer from this list refreshes the Browse Branches/Claim Groups section in the bottom of the screen to contain all Branches/Claim Groups associated with a given Insurer.

Adding a Branch/Claim Group

The **ADD NEW BRANCH/CLAIM GROUP** button located in the Browse Branches/Claim Groups section of the *Insurer Management* screen is available only when the Insurer details have been previously completed and validated through HCAI's insurer support channel.

Clicking the **Add New Branch/Claim Group** button will prompt you to create a new Branch/Claim Group

Branch/Claim Group names are hyperlinked here—click them to edit Branch/Claim Group Details

To add a new branch/claim group:

1. Click **ADD NEW BRANCH/CLAIM GROUP**. The *Branch/Claim Group Details* screen appears with empty fields waiting to be filled with Branch/Claim Group details. The Branch/Claim Group Status value is "Active."
2. Type in the Branch/Claim Group name as assigned by the Insurer. The name is to contain no more than 50 characters.
3. Specify the Branch/Claim Group ID. The ID is the unique Branch/Claim Group identifier provided by the Insurer.
4. Enter the address of the Branch/Claim Group, selecting the province from the drop-down list.
5. Enter the first and last name, phone number and email address of Contact 1 in the respective fields.
6. Enter similar information for Contact 2 (if any) in the respective fields.
7. Click **SAVE** to save the new Branch/Claim Group.

If this information is incomplete, or invalid, you are returned to the *Branch/Claim Group Details* screen with an error message at the top identifying the field name(s) that is(are) either incomplete or invalid. You must correct the information and save the Branch/Claim Group information again.

Once the Branch/Claim Group information is validated, you are returned to the *Branch/Claim Group Details* screen with a message, indicating the successful creation of the Branch/Claim Group entity.

To clear the information and reload the *Branch/Claim Group Details* screen, click **CANCEL**.

After you have created and saved a new Branch/Claim Group, the **ADD NEW BRANCH/CLAIM GROUP** button appears at the top of the *Branch/Claim Group Details* screen.

The "New Branch/Claim Group Created" message, shown here, indicates that the new Branch/Claim Group was successfully created

To add another branch/claim group, click the **Add Branch/Claim Group** button

Add another Branch/Claim Group

Click the Add Branch/Claim Group button to add another Branch/Claim Group. This clears the fields onscreen and you can enter information required to create another Branch/Claim Group entity, as described above.

Searching for a Branch/Claim Group in the Insurer Management screen

Go to the Browse Branches/Claim Groups section. This section contains a list of Branches/Claim Groups associated with a given Insurer.

If an Insurer has multiple Branches/Claim Groups, you can sort the list to facilitate the search:

- To search by the Branch/Claim Group name, click the "Branch/Claim Group Name" column header. This sorts the names in ascending alphabetical order. Click it again to sort the list in descending order.
- To sort by the Branch/Claim Group's city of residence, click the "City" column header. This sorts the city list in ascending alphabetical order. Click it again to sort the list in descending order.

Click on the arrow at the top of the column, shown here, to sort by Branch/Claim Group Name or City

Updating a Branch/Claim Group

1. Select the Branch/Claim Group from the Browse Branch/Claim Group section on the screen
2. In this screen, update the Branch/Claim Group details as required
3. To validate and save the details, click **SAVE** — if any of the fields are incomplete or contain invalid information, the changes are not saved and you are returned to the Branch/Claim Group Details page; HCAI highlights the fields needing attention with the ! symbol
4. To exit, click **CANCEL**

Turn on/off document Submission to a Branch/Claim Group

Insurers can control whether a facility can select a particular branch/claim group from the submission drop-down menu at the time of document submission. Ultimately, however, the form will be directed to the branch/claim group the associated claimant has been set up in. For this reason, if you have a branch/claim group with active claims, you should continue to manage user access to that branch until all claims are run down and are deactivated.

To turn off facility submission to a branch/claim group, you must have the **Organization Administrator** role.

1. Go to Manage tab and the Insurer Management sub-tab.
2. If your organization has child insurers, locate the "Select Insurer" dropdown at the top of the page and select the insurer whose claim group you'd like to edit.
3. Scroll down to the bottom of the screen and locate the 'Browse Branches/Claim Groups' section.
4. Click the name of the branch/claim group you would like to edit.
5. In the 'Branch/Claim Group Management' section, it asks "Allow facilities to submit documents to this branch/claim group?" Select 'No' to hide the claim group from facilities or 'Yes" to make the claim group visible.
6. Click "Save".

Turn on/off New Claimant Set Up in a Branch/Claim Group

If you have a branch/claim group you would like to wind down, you may wish to prevent new claim-claimant records from being set up in it. Insurers can control whether new claim-claimant records can be set up in a branch/claim group in the Branch/Claim Group Management section. This setting will also prevent claims from being transferred into this branch/claim group.

If you integrate your claims software with HCAI, you should first speak with your technical team to ensure that claim/claimant records are not being automatically routed to that branch. Otherwise, you may encounter issues with your integration feed.

To turn off new claim/claimants set up in a branch, you must have the **Organization Administrator** role.

1. Go to Manage tab and the Insurer Management sub-tab.
2. If your organization has child insurers, locate the "Select Insurer" dropdown at the top of the page and select the insurer whose branch/claim group you'd like to edit.
3. Scroll down to the bottom of the screen and locate the 'Browse Branches/Claim Groups' section.
4. Click the name of the branch/claim group you would like to edit.
5. In the 'Branch/Claim Group Management' section, it asks "Allow claim-claimants to be set up in this branch/claim group?" Select 'No' to prevent claim-claimants being set up or select 'Yes" to allow it.
6. Click "Save".

Control whether you want a branch/claim group to allow document submission to it and also whether new claim-claimant records can be set up in this settings panel

Deactivating a Branch/Claim Group

1. Select a required Branch/Claim Group from the list in the Browse Branches/Claim Groups section of the *Insurer Management* screen
2. Click the **DEACTIVATE** button next to the Branch/Claim Group to deactivate—this branch/Claim Group is successfully deactivated if there are no active claims associated to the Branch/Claim Group
3. Upon successful deactivation of the Branch/Claim Group, the **DEACTIVATE** button is replaced by the **ACTIVATE** button

If the Deactivation is successful, the button will change to Activate, shown here
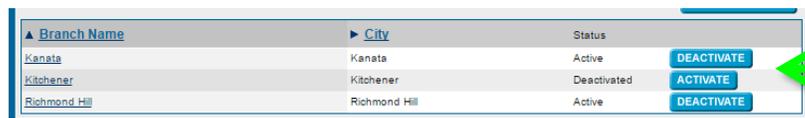
▲ Branch Name	▶ City	Status	
Kanata	Kanata	Active	DEACTIVATE
Kitchener	Kitchener	Deactivated	ACTIVATE
Richmond Hill	Richmond Hill	Active	DEACTIVATE

Deactivating from the *Branch/Claim Group Details* screen

1. You may also deactivate a Branch/Claim Group from inside the *Branch//Claim Group Details* screen. Click on the name of the Branch/Claim Group to open the Branch/Claim Group Details screen.
2. Click the **DEACTIVATE** button at the top of the *Branch/Claim Group Details* screen
3. Click <OK> in the confirmation dialog box that appears—the Branch/Claim Group is now deactivated

Reactivating a Deactivated Branch/Claim Group

1. Select the desired Branch/Claim Group from the list in the Browse Branches/Claim Groups section of the *Branch/Claim Group Details* screen
2. Perform one of the following actions:
   a. Click **ACTIVATE** next to the selected Branch/Claim Group; upon successful activation of the Branch/Claim Group, the **ACTIVATE** is replaced with a **DEACTIVATE** button **OR**
   b. Click on the name of the Branch/Claim Group to proceed to the *Branch/Claim Group Details* screen and activate the Branch/Claim Group.