

# SERVICE PROVIDER

## WEB SYSTEM (SWS)



**User Manual**  
• General •



You always get something out.

OUTurance is an authorised financial services provider.

## Table of Contents

1. Background	3
2. Login Procedure	4
3. Correspondence	7
4. Finance History	10
5. CSI Feedback	12
6. Maintenance	15

## Table of Figures

Figure 1: SWS Login - Temporary password e-mail	4
Figure 2: SWS Login - Landing page	5
Figure 3: Login page - Verification code	5
Figure 4: Password e-mail - Forgot your password link	6
Figure 5: Correspondence - Landing page	7
Figure 6: Correspondence - Reply screen	8
Figure 7: Correspondence - Acknowledgement	9
Figure 8: Correspondence - Archive screen	9
Figure 9: Correspondence - Reminder e-mail	9
Figure 10: Finance history - Remittance search I	10
Figure 11: Finance history - Remittance search II	10
Figure 12: Finance history - Remittance search results	11
Figure 13: CSI Feedback tab	12
Figure 14: CSI Minimum response logic	12
Figure 15: CSI Feedback - CSI graph	13
Figure 16: CSI Feedback - Search screen	13
Figure 17: CSI Feedback - Search results	14
Figure 18: CSI Feedback - How to comment on CSI	14
Figure 19: Maintenance tab	15
Figure 20: Maintenance - Notification changes	16
Figure 21: Maintenance - Add web user I	16
Figure 22: Maintenance - Add web user II	17
Figure 23: Maintenance - Add web user III	17
Figure 24: Login details for new web user	18
Figure 25: Data captured on new user	18

## 1. BACKGROUND

# Welcome WEB user!

You have been activated to use the new **Service Provider WEB System (SWS)** allowing the following functionality to your Service Provider (SP) profile:

- Track all claims via the system
- Submit payments via the system
- Monitor Customer Satisfaction Index (CSI) performance
- Provide feedback on negative CSI responses
- Receive documentation and communication from OUTsurance Procurement
- View and download the **SWS** manual

The basic **SWS** login and correspondence sections are included in this document for ease of reference for users not familiar with the **SWS**. If however users are familiar with these sections, proceed to section three on page eight for the explanation on the **Correspondence** tab.

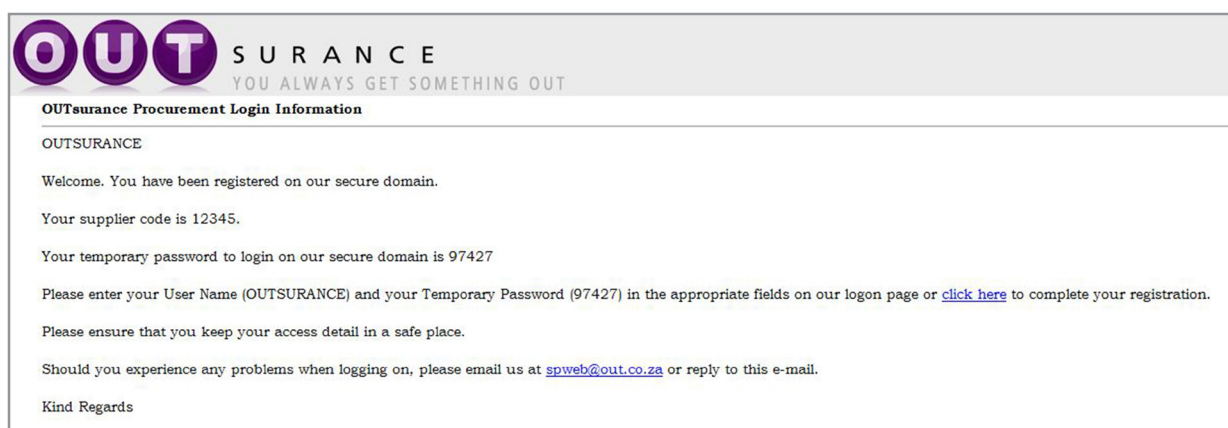


## 2. LOGIN PROCEDURE



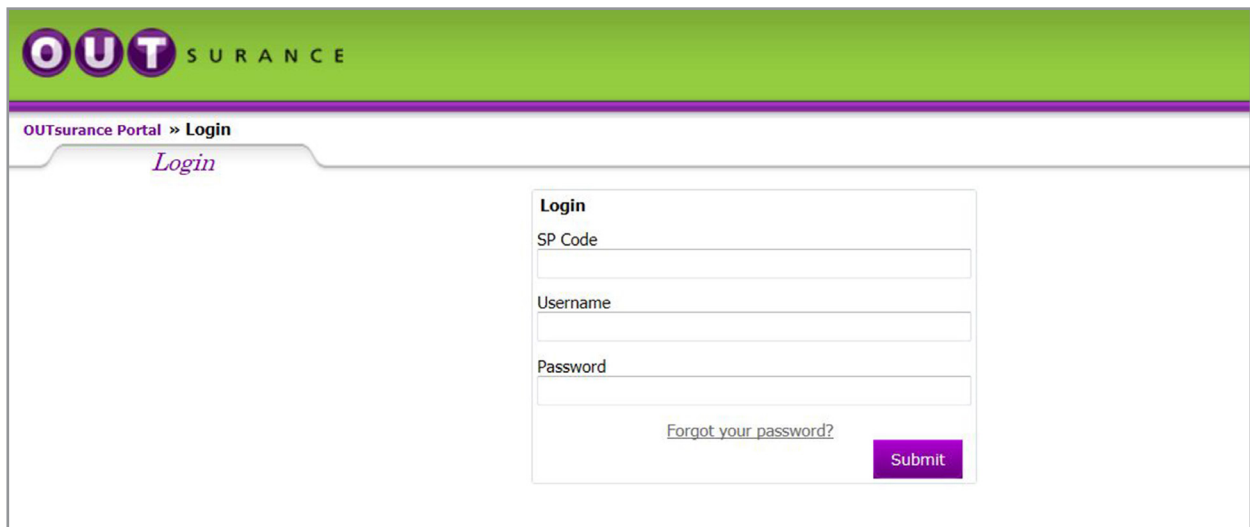
In order to start the login procedure, an e-mail notification from **OUTsurance** should have been received containing a **Service Provider (SP) code**, **username** and **temporary password**. Please note that **usernames** are unique for each user while the **SP code** is unique per company and not the individual.

A unique **temporary password** is created for each user to be used on the initial login. This password will only allow each specific user to login. It is important to note that each user required to gain access to the **SWS** have to login and request a temporary password. Users will be prompted to capture a new personal password following the initial login. The **SWS** can be accessed via [www.sias.co.za](http://www.sias.co.za).



*Figure 1: SWS Login - Temporary password e-mail*

Once the correct site is accessed the login screen will appear as per figure 2 below:



OUTSURANCE

OUTsurance Portal » Login

Login

Login

SP Code

Username

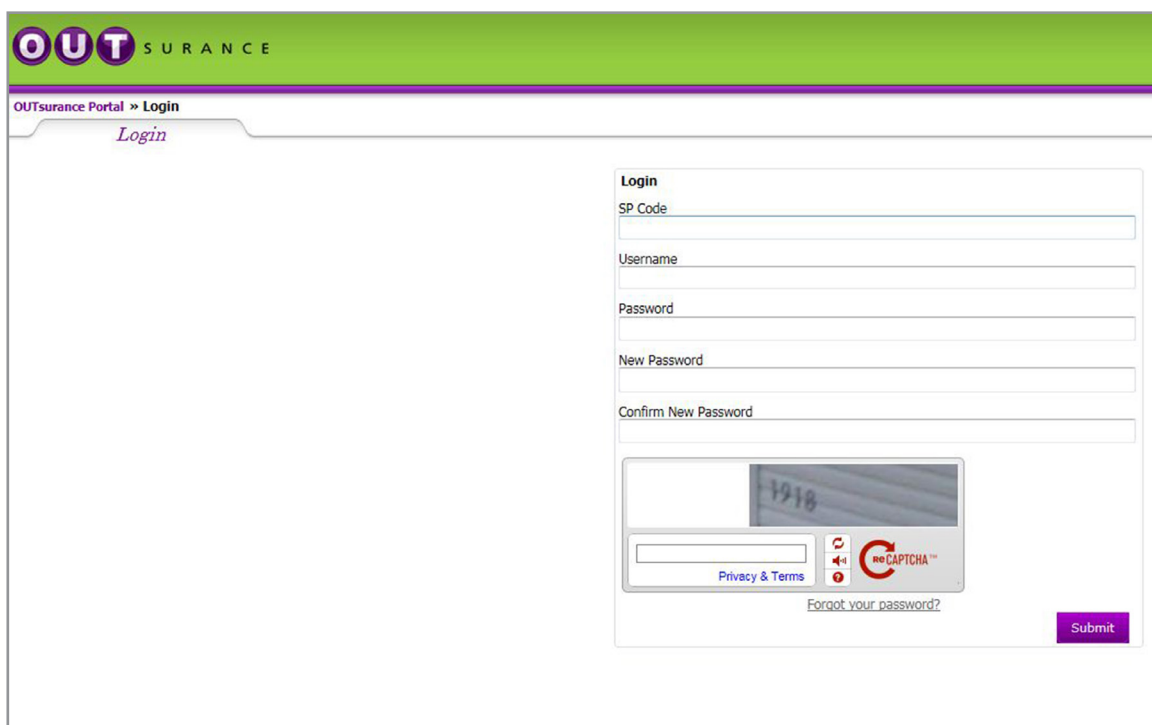
Password

[Forgot your password?](#)

Submit

Figure 2: SWS Login - Landing page

Enter the information from the temporary password e-mail in the specified fields. Click **Submit** once all fields are completed. The **SWS** will prompt users to capture a new password on the following screen:



OUTSURANCE

OUTsurance Portal » Login

Login

Login

SP Code

Username

Password

New Password

Confirm New Password

[Forgot your password?](#)

Submit

1918

Privacy & Terms

Figure 3: Login page - Verification code

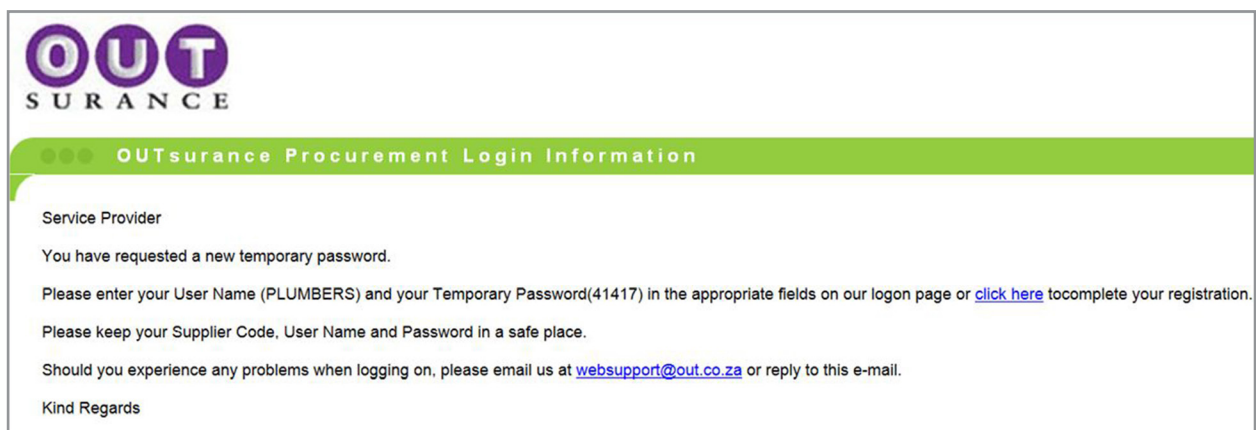
To finalise the login, complete the **SP Code**, **Username** and **Password** (referring to the temporary password submitted via e-mail) fields. On the **New Password** field choose a new password at least **six characters** long and containing one or more of each of the following:

- A capital letter
- A numeric letter
- A special character (e.g. !@#\$%^&\*)

**Sample passwords are illustrated below:**

- Name!1
- Plumbers!321
- Out@2015

The last step is to click on **Submit**. When clicking on the **'Forgot your password'** link the system will submit a **new password** to your user e-mail address as per the example below:




**Figure 4: Password e-mail - Forgot your password link**

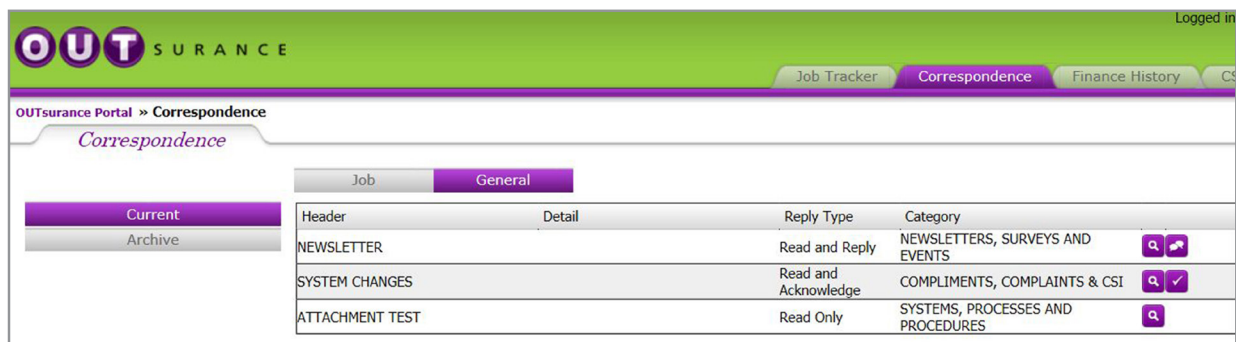
Once logged in, the **Correspondence** tab will appear first. This page contains all communication from OUTsurance. If no new communication was sent, the Job Tracker will open by default. On the **Job Tracker**, all new claims will reflect where completion of each task is required per claim.

### 3. CORRESPONDENCE



The **Correspondence** tab contains all communication sent by OUTsurance Procurement. The tab has two sub-sections to the left: **Current** and **Archive**. Current contains general communication, compliments, complaints, B-BBEE correspondence and newsletters that is **New** and requires action.




If OUTsurance has sent new communication requiring action the **SWS** will default to the **Correspondence tab** upon successful login until the action is complete. It is important to note that not all correspondence require action. Examples of actions include a reply, acknowledge or acknowledge and reply. New correspondence that does not require action will be marked with a  **View** icon.




Header	Detail	Reply Type	Category
NEWSLETTER		Read and Reply	NEWSLETTERS, SURVEYS AND EVENTS
SYSTEM CHANGES		Read and Acknowledge	COMPLIMENTS, COMPLAINTS & CSI
ATTACHMENT TEST		Read Only	SYSTEMS, PROCESSES AND PROCEDURES

Figure 5: Correspondence - Landing page

Hovering over the icons with the mouse cursor indicates the action required:

Icon	Action
	View only
	View and reply
	View and acknowledge

On correspondence that requires a reply, click on the  **Reply to correspondence** icon. A screen will appear to capture and submit a reply. Refer to figure 6 below:

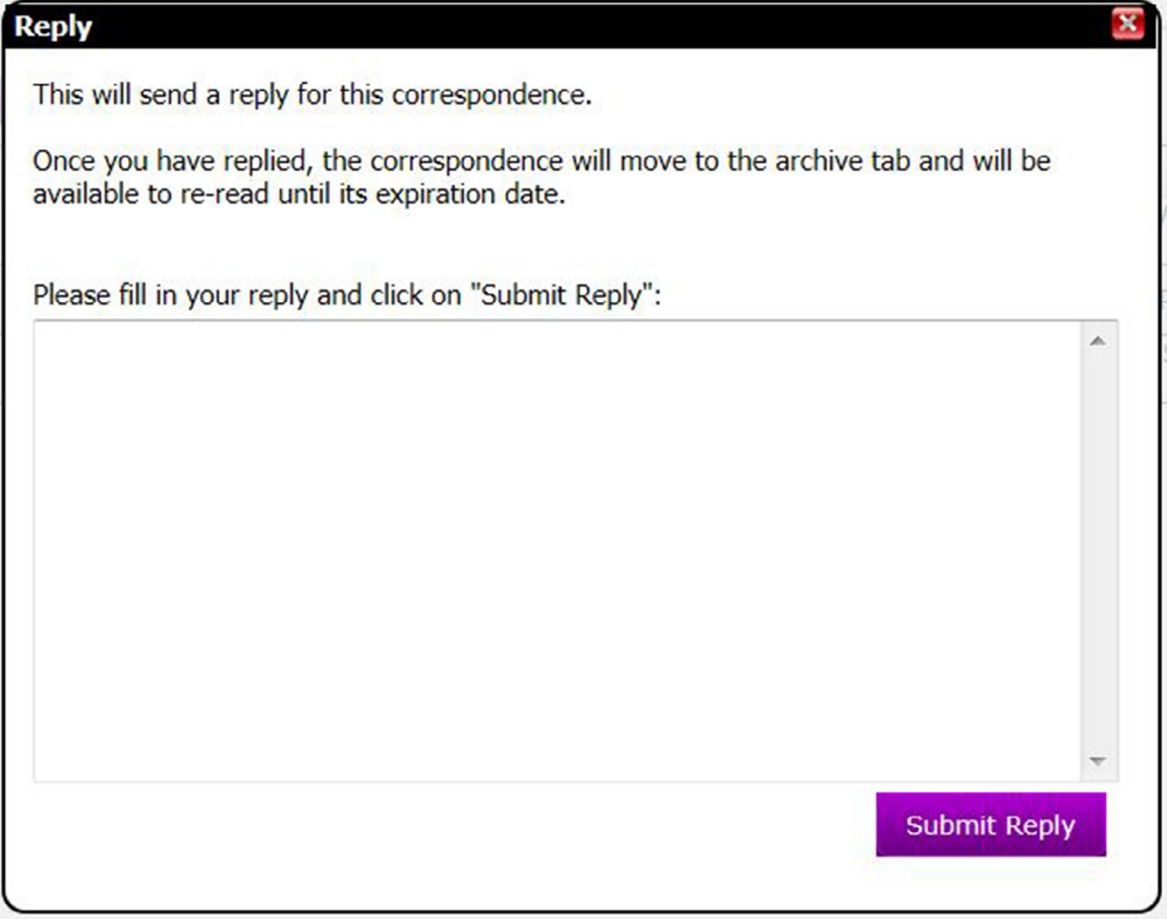



Figure 6: Correspondence - Reply screen

On correspondence that requires acknowledgement, click on the  **Acknowledge correspondence** icon. The following box will appear to acknowledge receipt:



Reply

This will send an acknowledgement that the correspondence has been read.

Once the correspondence has been acknowledged, it will move it to the archive tab and will be available for re-read until its expiration date.

In order to acknowledge receipt of the correspondence, please click on the "Acknowledge" button.

Acknowledge

Figure 7: Correspondence - Acknowledgement

All correspondence is stored on the **Archive Tab** for ease of reference.

OUTSURANCE

Job Tracker

Correspondence

Finance History

CSI

OUTsurance Portal » Correspondence

Correspondence

Current

Archive

Job

General

Category

Header	Detail	Reply Type	Category
NEWSLETTER		Read and Reply	NEWSLETTERS, SURVEYS AND EVENTS
SYSTEM CHANGES		Read and Acknowledge	COMPLIMENTS, COMPLAINTS & CSI

Figure 8: Correspondence - Archive screen

An automated e-mail is sent to the user replicating all communication sent to the **SWS** as per the example below. The e-mail is purely a reminder that **ALL** communication need to be attended to on the **SWS** as per the above examples.

Send

To...

OUTsurance@out.co.za

Cc...

Bcc...

Subject:

G000090 NEWSLETTER, SURVEYS AND EVENTS

Dear Service Provider

Attached, please find the correspondence to review and reply.

OUTsurance

Figure 9: Correspondence - Reminder e-mail


## 4. FINANCE HISTORY



The **Finance History** tab contains all remittances and copies of invoices paid.

A screenshot of the OUTSURANCE web portal. The top navigation bar is green with the OUTSURANCE logo and tabs for Job Tracker, Correspondence, Finance History, and CSI. The main content area is titled "OUTsurance Portal » Finance History" and "Finance History". Under "Financial History Search Options", there are input fields for "From Date", "To Date", "Policy / Facility Number", and "Claim Number". There are also checkboxes for "Invoiced" and "Paid", and a "Search" button. Below the search options, there is a section for "Financial History Search Results" which currently displays "No results found for the specified search criteria".

Figure 10: Finance history - Remittance search I

Click on the  **Calendar** icon to select date ranges "From" and "To" to retrieve required information.

A screenshot of the OUTSURANCE web portal, similar to Figure 10, but with a calendar open for the "From Date" field. The calendar is for August 2015, showing days from Sunday to Saturday. The date 18 is highlighted. The "To Date" field is also visible. The "Search" button and the "No results found" message are still present.

Figure 11: Finance history - Remittance search II

Refine the search by entering a claim number, invoice number, policy number or by searching on the status (Invoiced or Paid). Search results are displayed below the search block. Please refer to figure 12 below.

Logged in as OUT

[Job Tracker](#)
[Correspondence](#)
[Finance History](#)
[CS](#)

OUTsurance Portal » Finance History

### Finance History

**Financial History Search Options**

From Date: 17 Aug 2015 To Date: 18 Aug 2015

Policy / Facility Number:  Claim Number:

Invoice Number:  Invoiced ☐ Paid ☐

**Financial History Search Results**

Invoice No	Your Reference	Status	Claim No	Invoice Date	Invoice Amount	Payment Date	Paid Amount	Remittance Advice	Invoice
11136822	61035	Paid	128049682	17 Aug 2015	8,388.11	17 Aug 2015	8,388.11		
11136849	60974	Paid	127558467	17 Aug 2015	17,551.83	17 Aug 2015	17,551.83		
11136889	60919	Paid	127539672	17 Aug 2015	30,781.40	17 Aug 2015	30,781.40		
11136921	60837	Paid	127148442	17 Aug 2015	8,982.35	17 Aug 2015	8,982.35		
11138852	61143	Paid	128146854	17 Aug 2015	2,034.88	17 Aug 2015	2,034.88		

Figure 12: Finance history - Remittance search III

## 5. CSI FEEDBACK



The **CSI Feedback** tab contains service ratings from clients upon completion of all paid claims. This metric is very important to monitor as it indicates how your business is performing pertaining to service. Keep in mind that allocated claim volumes are directly linked to CSI scores. The **CSI Feedback** tab enables SPs to compare their CSI scores against industry levels as well as responding to negative feedback (complaints) from clients.

A screenshot of the OUTSurance web portal. The top navigation bar is green with the OUTSurance logo and tabs for Job Tracker, Correspondence, Finance History, and CSI Feedback. The CSI Feedback tab is active. Below the navigation bar, there's a search section with 'Search Scores' and 'Feedback' tabs. The 'Search Scores' tab is selected. It includes a 'From Date' field set to '01 Jul 2015', a 'To Date' field set to '31 Aug 2015', and a 'Search' button.

Figure 13: CSI Feedback tab

The screen has two tabs, **Scores** and **Feedback**. The Scores tab displays CSI scores relative to that of the industry. Currently a minimum of **10** CSI responses are used to calculate and compare scores to the industry. If the minimum required responses cannot be found in the last month another month's responses will be added. This process will continue to add additional months' data until the minimum number of responses are more than the minimum requirement. Please note that the number of minimum responses may vary per service type. Change the dates to find specific scores as deemed necessary.

Service Provider	Jan	Feb	March	April	June	Months used for CSI	Total Responses
Service Provider 1	3	1	4	2	1	5	11
Service Provider 2	11	9	7	9	8	2	17
Service Provider 3	13	15	17	18	13	1	13

Figure 14: CSI Minimum response logic

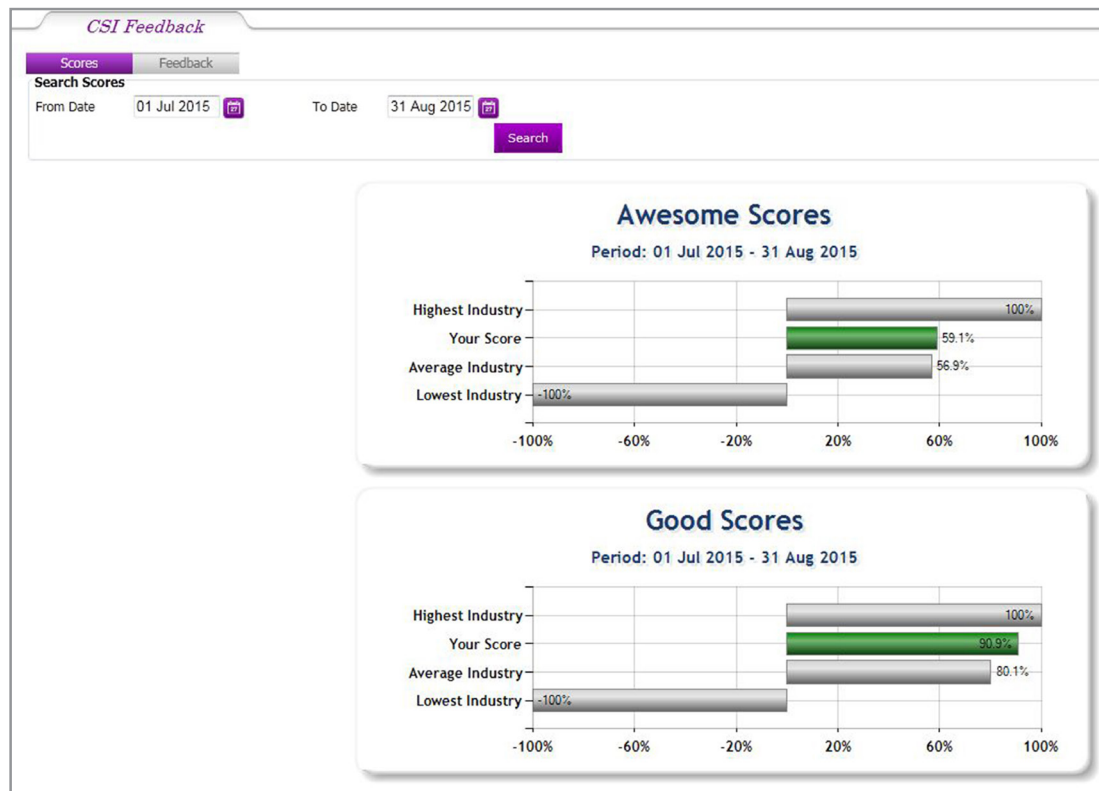



Figure 15: CSI Feedback - CSI graph

The **Feedback** tab displays detailed responses received from clients. Specific responses can be searched for by completing one or more search criteria fields. Search results will appear below the search block.  depicted in figure 17.

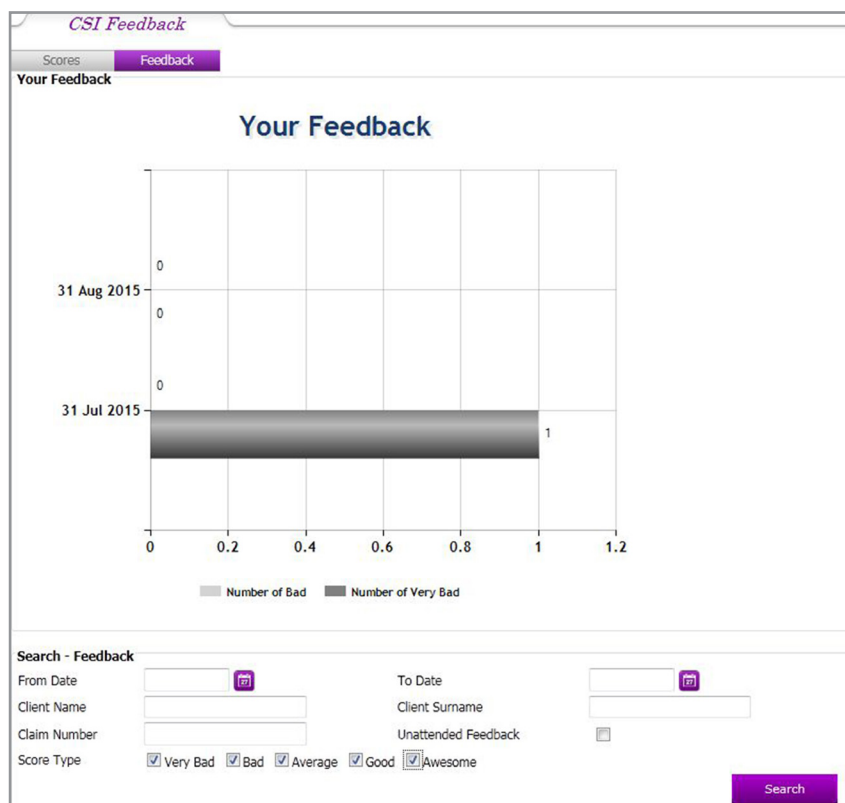


Figure 16: CSI Feedback - Search screen

Search - Feedback

From Date

26 Jul 2015

To Date

18 Aug 2015

Client Name

Client Surname

Claim Number

Unattended Feedback

☐

Score Type

☒ Very Bad
☒ Bad
☒ Average
☒ Good
☒ Awesome

Search

Search Results - Feedback

Feedback ID	Load Date	Claim Number	Title	Name	Surname	Response
2261457	26 Jul 2015	127219591	MRS	ELAINE	SOCHER	Good
2262098	27 Jul 2015	126584742	MRS	CAROL	PATTISON	Good
2262258	27 Jul 2015	126601173	MR	JAMIE	NAYLOR	Very Bad
2272153	03 Aug 2015	127321443	MRS	ELIZABETH	SHERRATT	Good
2274613	04 Aug 2015	127523873	MR	JONAS M	MAKWAQWA	Awesome
2283415	12 Aug 2015	127195666	DR	DANA PETA	GAMPEL	Good
2282432	12 Aug 2015	127220650	MRS	CHRISTINA	CAMERON	Awesome
2286662	14 Aug 2015	127464891	MS	CRISTEEN	DE VOS	Good
2285429	14 Aug 2015	127298758	MISS	ARLENE	LUBBE	Awesome
2287473	17 Aug 2015	127558467	REV	BRENT	CHALMERS	Good

Figure 17: CSI Feedback - Search results

Comments have to be made on all negative (Bad & Very Bad) and Average responses received. To add a comment click on the comment section next to the claim, capture a response and click on **Submit**.

Comments

Date

29 JUL 2015

Comment

This is not a negative against us in any way whatsoever. Client most unhappy that damage to rear bumper was not repaired - this was not given to us by Outsurance at all. We have since received authorization & asked client to return vehicle for 2 days for this repair. PLEASE reverse this.

Please enter your response here:

Figure 18: CSI Feedback - How to comment on CSI

## 6. MAINTENANCE



The **Maintenance** tab contains information about web users.

A screenshot of the OUTSurance web application's 'Maintenance' tab. The header shows the 'OUTSurance' logo and a navigation bar with links for 'Job Tracker', 'Correspondence', 'Finance History', 'CSI Feedback', and 'Maintenance'. The 'Maintenance' tab is active. Below the header, there's a sub-header 'OUTSurance Portal » Maintenance' and a 'Maintenance' title. A tab selector shows 'Service Provider' and 'User', with 'User' selected. Under 'Notification Options', there are two sections: 'Would you like to be Notified?' with 'Yes' selected, and 'Select Notification Type' with 'SMS' and 'E-Mail' checkboxes. A third section, 'Tick information for update Notification.', has checkboxes for 'BANKING DETAIL' and 'CONTACT DETAIL'. A 'Submit' button is at the bottom right.

**Figure 19: Maintenance tab**

This function enables the following:

- Select notification type
- Notify OUTsurance Procurement of changes to contact and/or bank details to be made
- Add additional users



**OUT** SURANCE

OUTsurance Portal » Maintenance

*Maintenance*

Service Provider User

**Notification Options**

Would you like to be Notified? ☒ Yes ☐ No

Select Notification Type ☐ SMS ☒ E-Mail

**Tick information for update Notification.**

☐ BANKING DETAIL  
☐ CONTACT DETAIL

Submit

Figure 20: Maintenance - Notification changes

Once the selection is made click on **Submit** to send a notification to OUTsurance Procurement. To add **additional users** on the **SWS**, click on **User** and then on **Add User**.

**OUT** SURANCE

OUTsurance Portal » Maintenance

*Maintenance*

Service Provider User

Key	User Name	Name	E-Mail	Tel Code	Tel No	
4700	OUTSURANCE	OUTSURANCE	Out1@Outsurance.co.za	012	673 3155	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Refresh"/>

Add User

Figure 21: Maintenance - Add web user I



The following screen opens:

**Add User**

**User Detail**

Full Name

User Name

E-Mail Address

Contact Number (  )

Additional Options ☐ CHANGE USER DETAILS

**Add User**

**User Detail**

Full Name

User Name

E-Mail Address

Contact Number ( 012 )

Additional Options ☐ CHANGE USER DETAILS

Figure 22: Maintenance - Add web user II

All fields are compulsory. Capture all information (except the e-mail address) in capital letters. Once all information is captured, click **Submit**. An e-mail will be sent to the newly provided e-mail address to confirm the user name and supply a temporary password. The newly created user can then follow the login procedure as described in the first section of this document.

**OUTSURANCE**

OUTsurance Portal » Maintenance


*Maintenance*



Service Provider User

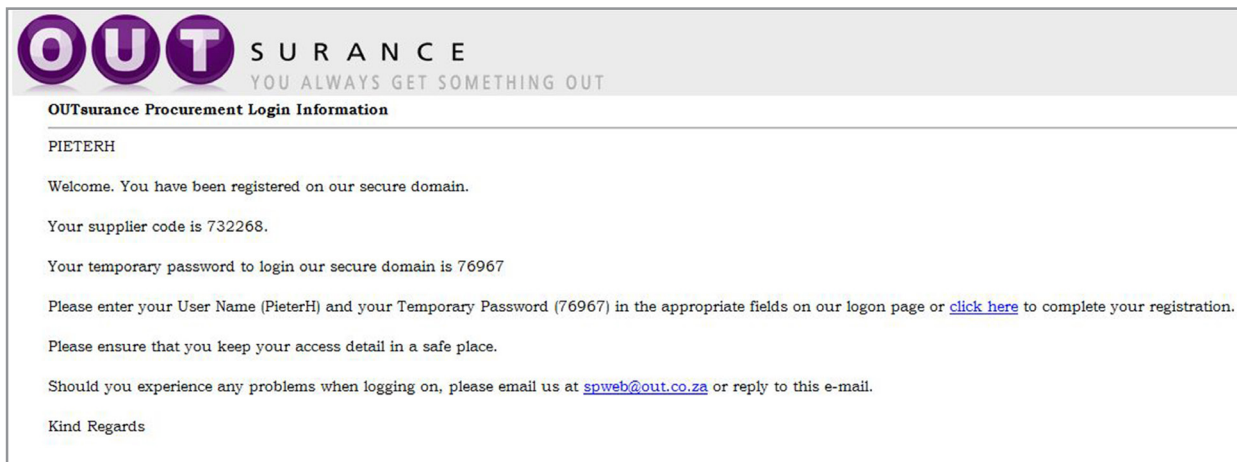
Key	User Name	Name	E-Mail	Tel Code	Tel No	
114	PieterH	Pieter Hefer	Out2@Outsurance.co.za	012	673 3166	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>
4700	OUTSURANCE	OUTSURANCE	Out1@Outsurance.co.za	012	673 3155	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>

Figure 23: Maintenance - Add web user III

Once the user is added the profile can be edited, deleted and refreshed (reset) by using the buttons below.

- The  **edit** icon enables editing of a user profile. Clicking this icon opens the dialogue box containing information pertaining to this user. Make the required changes and click **Submit**.

- The  **delete** icon deletes previously loaded users. This action should be performed when specific users has resigned or no longer work on the SWS.
- The  **refresh** icon resets a user's current profile. Clicking on this image sends an e-mail to the user with new login credentials. Only the admin user has administration rights to reset the user's login details.



**OUTSURANCE**  
YOU ALWAYS GET SOMETHING OUT

**OUTsurance Procurement Login Information**

PIETERH

Welcome. You have been registered on our secure domain.

Your supplier code is 732268.

Your temporary password to login our secure domain is 76967

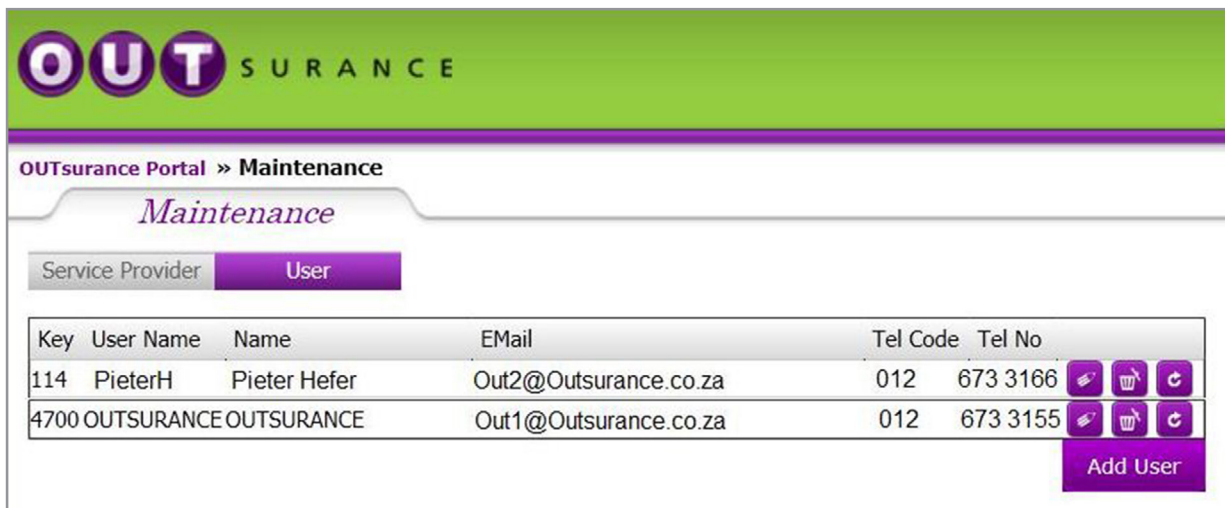
Please enter your User Name (PieterH) and your Temporary Password (76967) in the appropriate fields on our logon page or [click here](#) to complete your registration.

Please ensure that you keep your access detail in a safe place.

Should you experience any problems when logging on, please email us at [spweb@out.co.za](mailto:spweb@out.co.za) or reply to this e-mail.

Kind Regards

**Figure 24: Login details for new web user**






**OUTSURANCE**

**OUTsurance Portal » Maintenance**

*Maintenance*

Service Provider User

Key	User Name	Name	EMail	Tel Code	Tel No	
114	PieterH	Pieter Hefer	Out2@Outsurance.co.za	012	673 3166	  
4700	OUTSURANCE	OUTSURANCE	Out1@Outsurance.co.za	012	673 3155	  

**Add User**

**Figure 25: Data captured on new user**