SERVICE PROVIDER

WEB SYSTEM (SWS)

User Manual
• General •

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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.
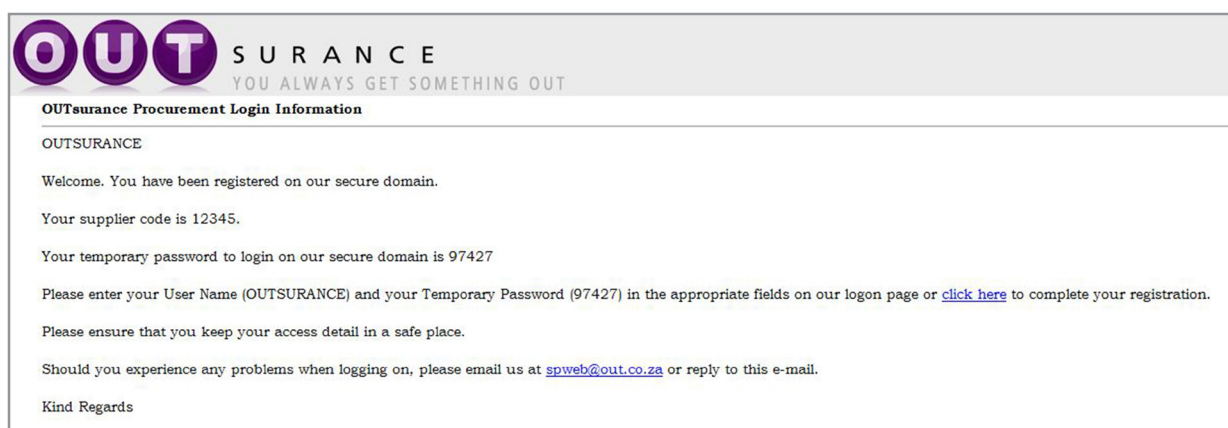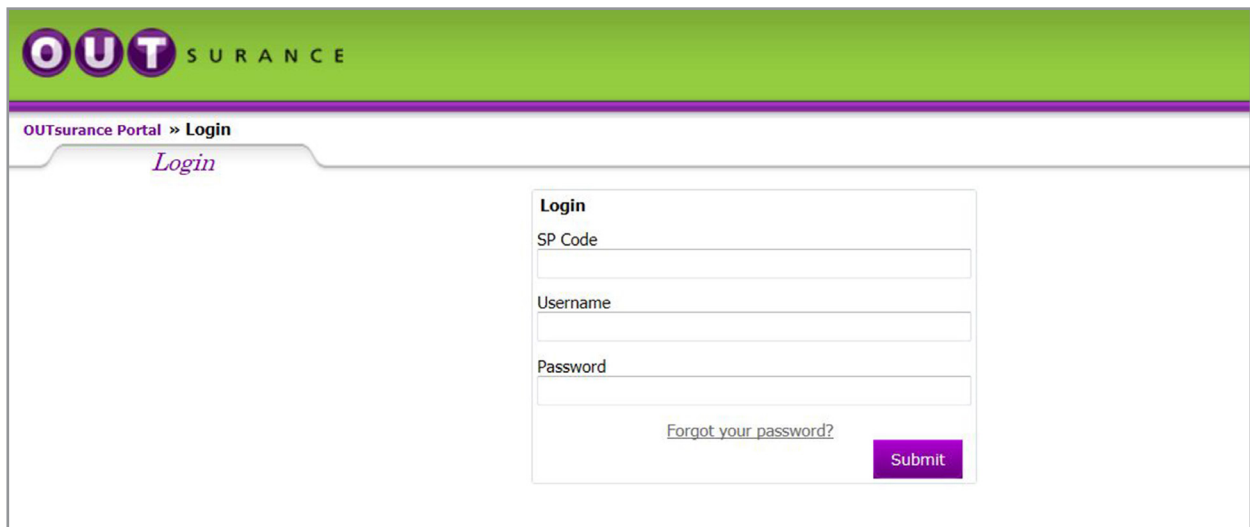
2. LOGIN PROCEDURE

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.

OUTSURANCE
YOU ALWAYS GET SOMETHING OUT

OUTsurance Procurement Login Information

OUTSURANCE

Welcome. You have been registered on our secure domain.

Your supplier code is 12345.

Your temporary password to login on our secure domain is 97427

Please enter your User Name (OUTSURANCE) and your Temporary Password (97427) 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 or reply to this e-mail.

Kind Regards

Figure 1: SWS Login - Temporary password e-mail

Once the correct site is accessed the login screen will appear as per figure 2 below:
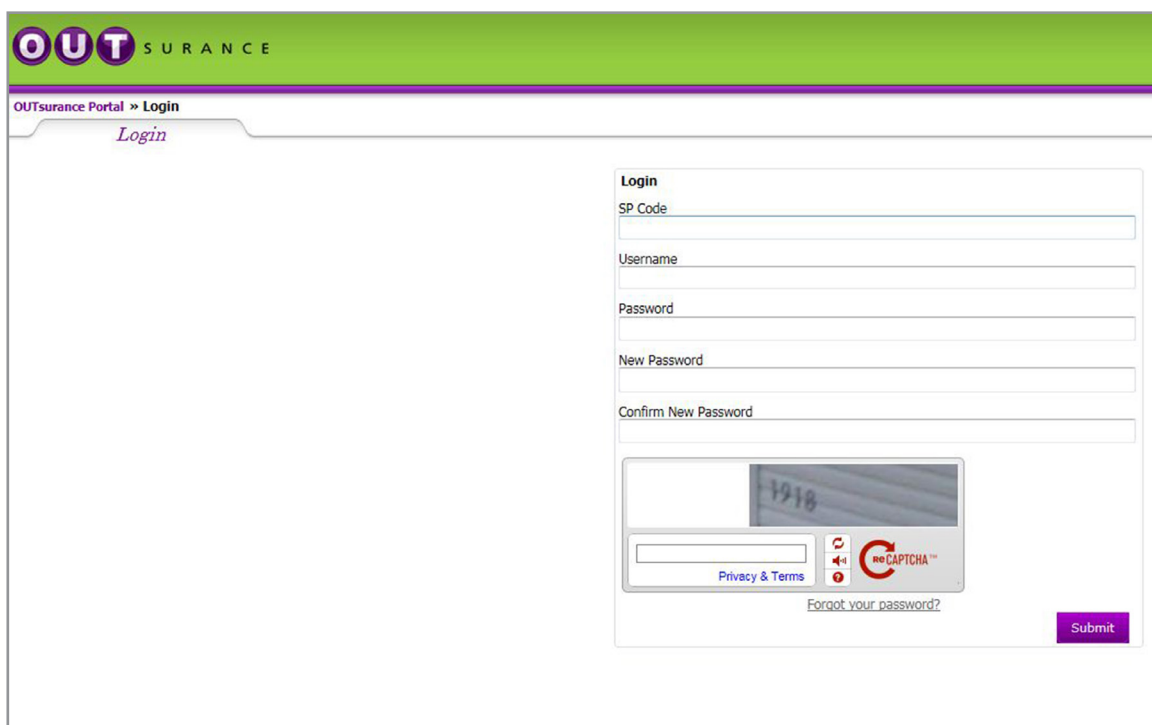
Figure 2: SWS Login - Landing page

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:

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:
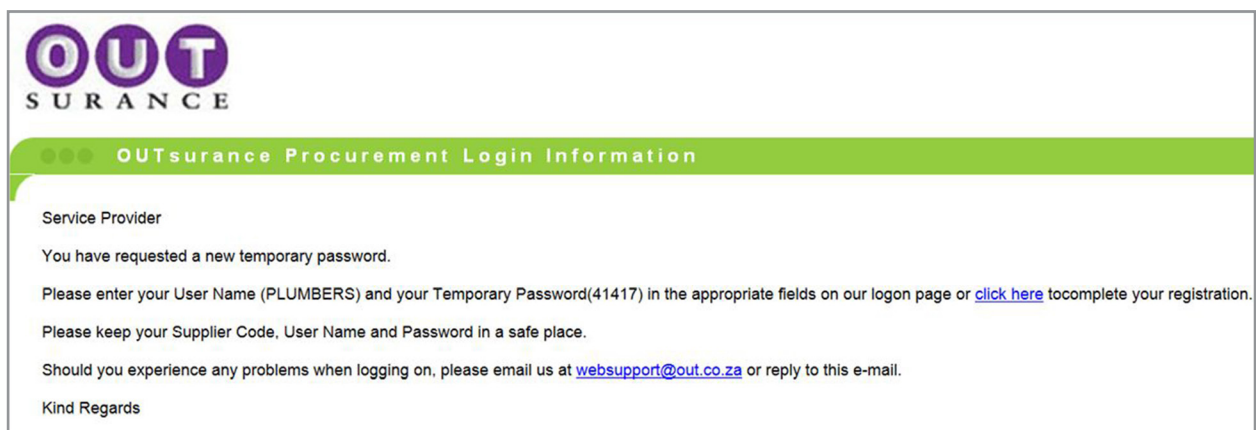
Figure 4: Password e-mail - Forgot your password link
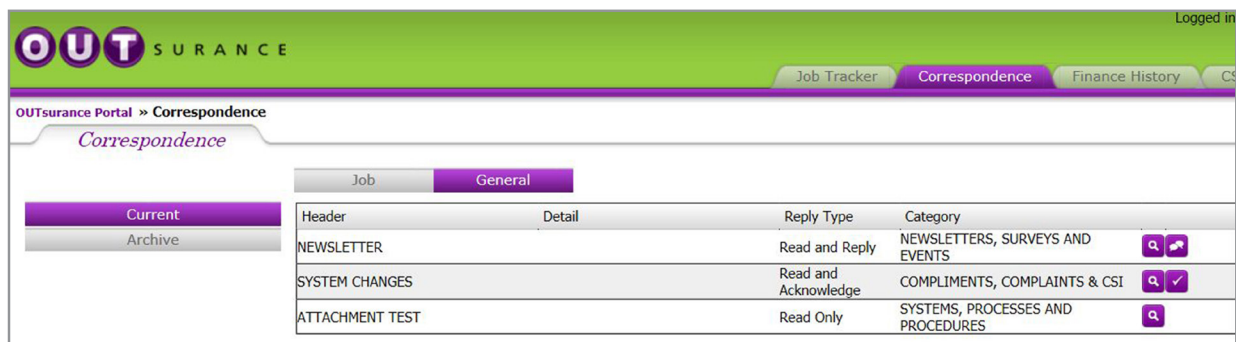
Once logged in, the *Correspondence* tab will appear first. This page contains all communication from OUTsurance. If no new communication was sent, the Job Tracker will open by default. On the *Job Tracker*, all new claims will reflect where completion of each task is required per claim.

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 [icon] **View** icon.

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:

Reply

This will send a reply for this correspondence.

Once you have replied, the correspondence will move to the archive tab and will be available to re-read until its expiration date.

Please fill in your reply and click on "Submit Reply":

Submit Reply
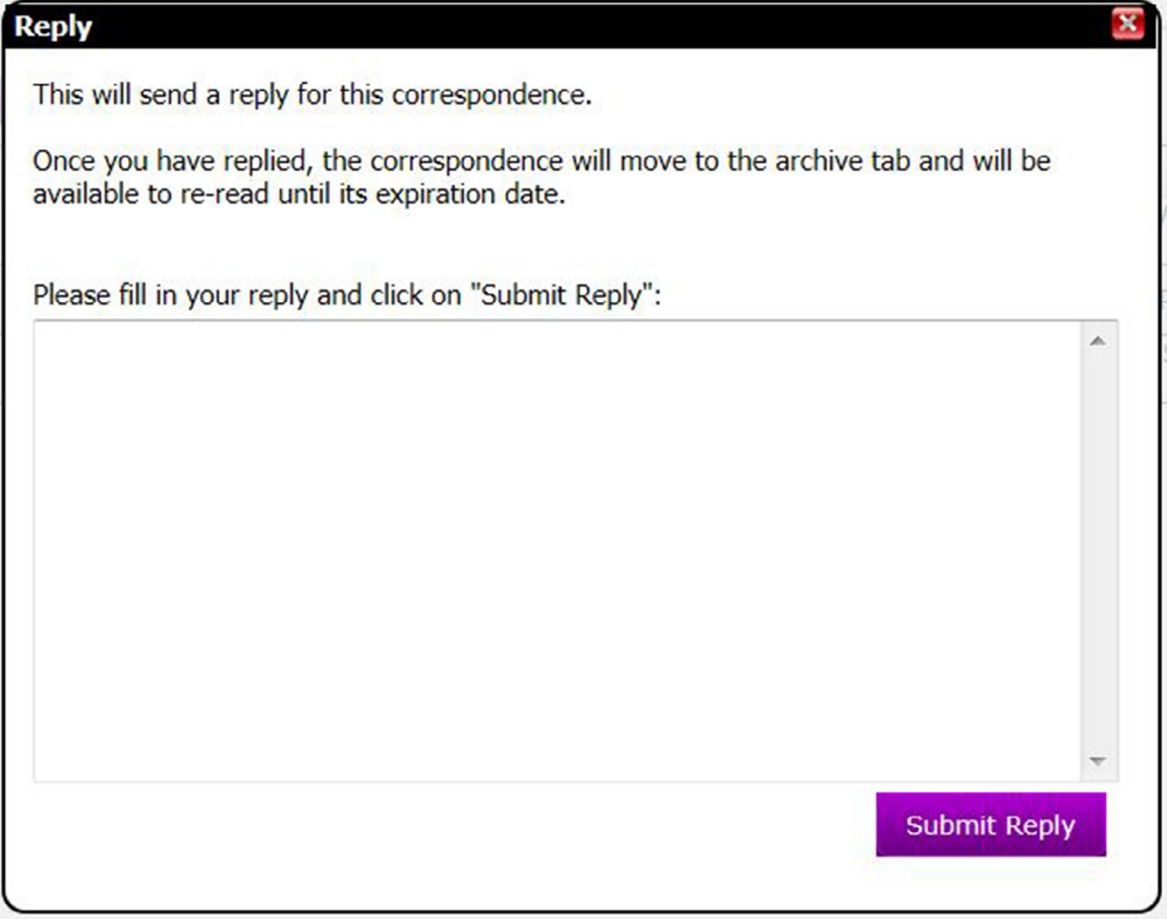
Figure 6: Correspondence - Reply screen

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

Figure 7: Correspondence - Acknowledgement

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

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.

Figure 9: Correspondence - Reminder e-mail

4. FINANCE HISTORY

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

Figure 10: Finance history - Remittance search I

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

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.

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.

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

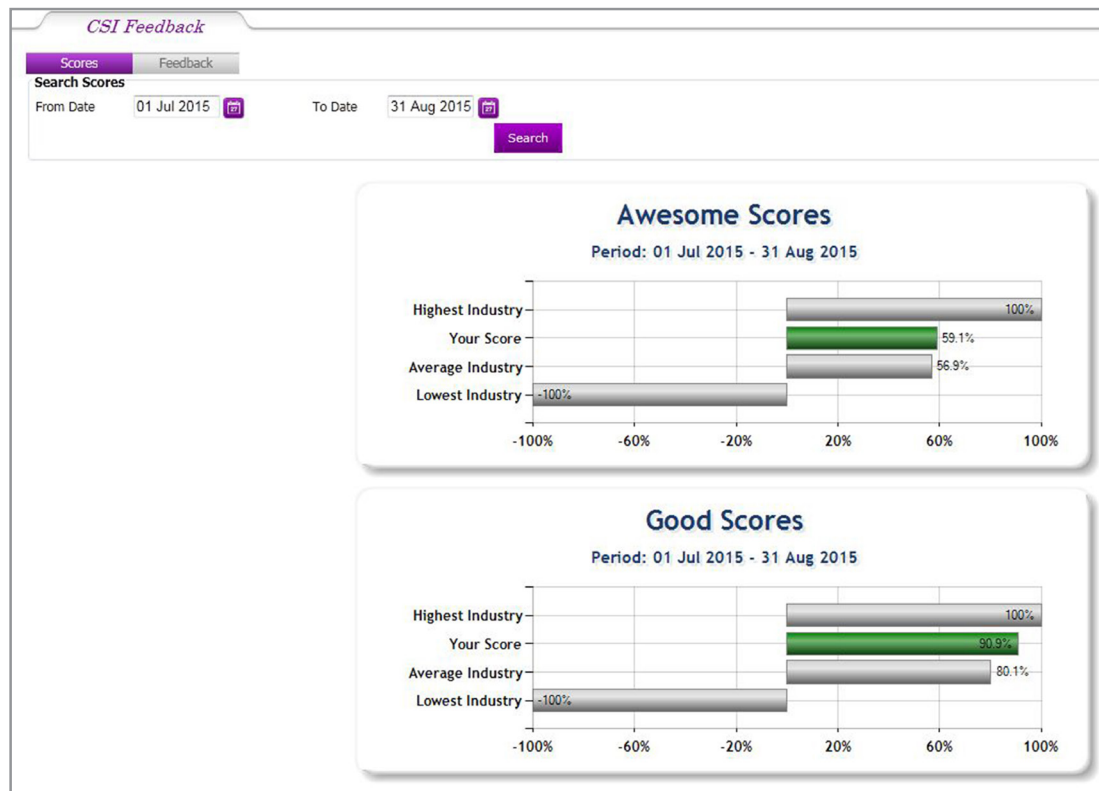*Figure 14: CSI Minimum response logic*

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. As depicted in figure 17.
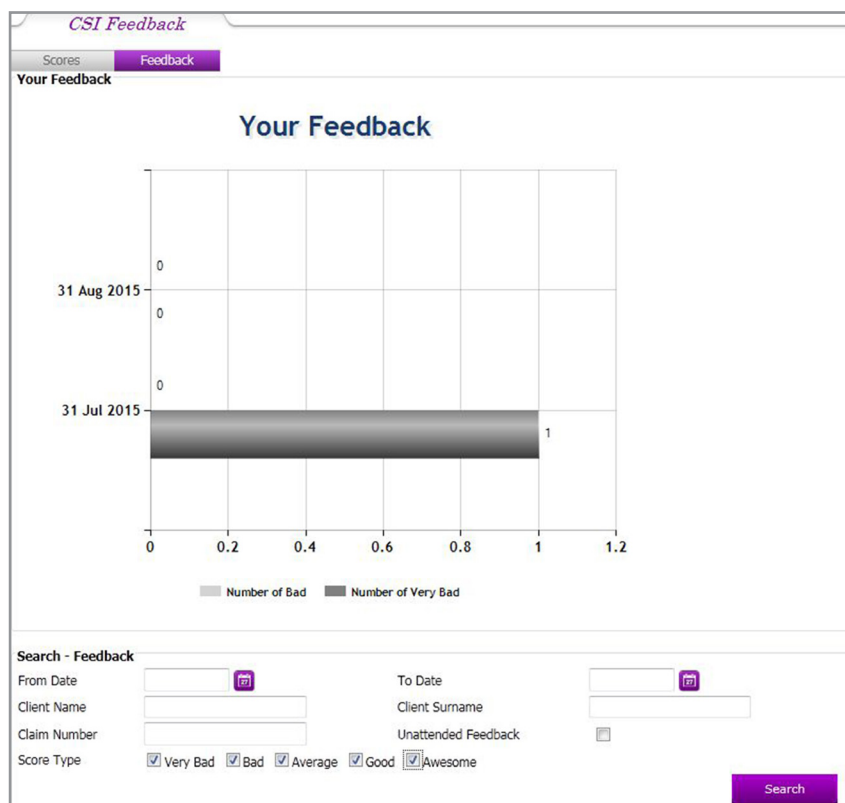

Figure 16: CSI Feedback - Search screen

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*.

Figure 18: CSI Feedback - How to comment on CSI

6. MAINTENANCE

The *Maintenance* tab contains information about web users.

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

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**.

Figure 21: Maintenance - Add web user I

The following screen opens:

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.
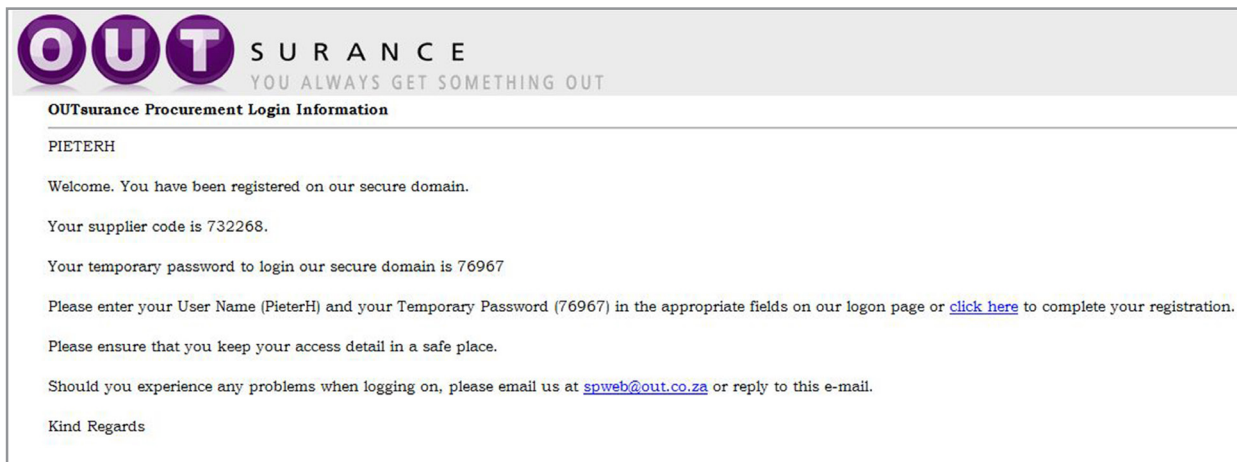
Figure 23: Maintenance - Add web user III

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

- The [edit icon] **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.

Figure 24: Login details for new web user

Figure 25: Data captured on new user