



Health Claims for Auto Insurance

INSURER USER MANUAL

Chapter 9

Insurer Management

July 2012

OVERVIEW

Insurer Management involves the setup and maintenance of Insurer organization structures within the HCAI system.

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Insurer Management Structure

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 discussed in [Chapter 10: Insurer User Management Overview](#). Insurer organizations are structured using entities arranged in a hierarchical format:

Insurer (parent) > Insurer (child) > Branch(es) > Adjuster(s)

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

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. A child Insurer that can use only the Branches and Adjusters associated with its parent Insurer and does not have any Branches or Adjusters of its own is classified as a “virtual Insurer.”

A Branch is defined as a location entity or domain responsible for handling and adjusting claim information. Branches are subsets of Insurers; a Branch can belong to only one Insurer.

An Adjuster is defined as an individual, or a team / workgroup responsible for direct claim handling within HCAI. An Adjuster can either be created in HCAI as a single user or as a team to which any number of users are associated.

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 Insurer, Branch, and Adjuster entities.

General Business Rules

The following business rules apply to Insurer, Branch, and Adjuster management at all times:

- An Insurer can be associated with zero or more Branches.
- A single insurer must have at least one Branch.
- An Insurer can be specified as a parent or child Insurer.
- A child Insurer that uses only Branches and Adjusters associated with its parent Insurer, and does not have any Branches or Adjusters of its own, is categorized as a “virtual Insurer.”
- A Branch cannot be added to or associated with virtual Insurers.
- An Adjuster cannot be deactivated until all open Claimants are reassigned to another Adjuster.
- A Branch cannot be deactivated until all Adjusters belonging to the Branch are deactivated.
- An Insurer cannot be deactivated until all Branches belonging to the Insurer are deactivated.
- A deactivated Insurer, Branch, or Adjuster cannot be referenced in new plans and invoices created in HCAI.
- New plans and invoices can not be submitted to a deactivated Insurer and Branch.
- An Insurer must have a unique IBC reporting company number.
- All activated Branches belonging to an Insurer must have a unique Branch identifier.
- All activated Adjusters belonging to an Insurer must have a unique Adjuster identifier.

Insurer Branch Management

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

The Insurer Branch Management functionality is found in the Insurer Management module, which is accessible from the Manage tab on the Insurer home page. 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, at the top of the page you may see the "Select Insurer" drop-down list, which contains one or more Insurer companies. Selecting an Insurer from this list refreshes the Browse Branches section in the bottom of the screen to contain all Branches associated with a given Insurer.)

KOH Global Re

PLANS INVOICES CLAIMS SEARCH **MANAGE** ? - User Manual

Search for Claim Number in All Forms Exact Match **GO** Advanced **LOGOUT**

INSURER MANAGEMENT USER MANAGEMENT REPORTS Welcome, Rafs to HCAI 2011/03/03

Fill in the fields to add or edit an Insurer
NOTE : All fields with an asterisk (*) are required.

DEACTIVATE

Insurer Details

Insurer Status: Active

* Insurer Name: KOH Global Re

* IBC ID: KOH

* Address: 3 KOH Drive

* City: Milton

* Province: ON - Ontario

* Postal Code: L9T 2E4

* Phone: (416) 445-8912

Fax:

Contact One Name:

Contact One Phone:

Contact One E-mail: kohiggins@ibc.ca

Confirm Contact One E-mail: kohiggins@ibc.ca

Contact Two Name:

Contact Two Phone:

Contact Two E-mail:

Confirm Contact Two E-mail:

Configuration Management

* Virtual Insurer? : No Yes

* Outbound Payment Feed? : No Yes

* Inbound Claim / Claimant Feed? : No Yes

* Outbound Insurer Extraction? : No Yes

* Privacy Consent? : No Yes

Browse Branches **ADD NEW BRANCH**

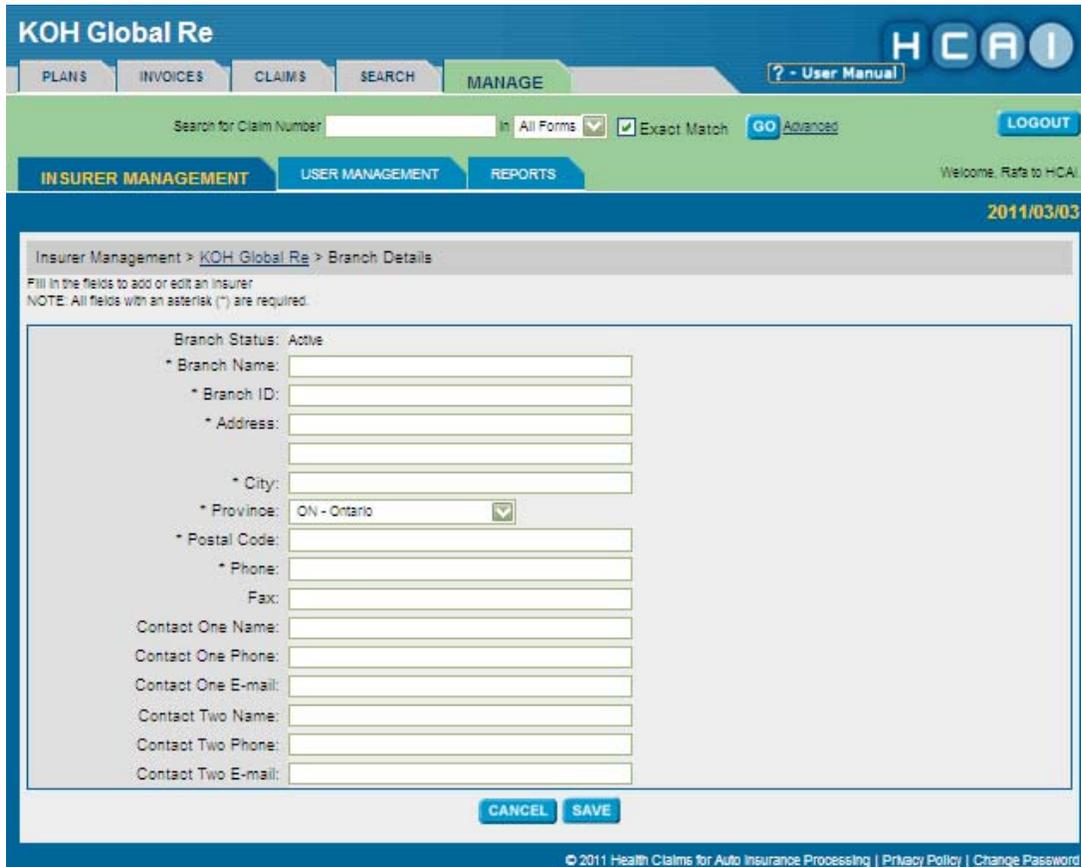
Branch Name	City	Status	
Acton	Acton	Active	DEACTIVATE
Dudko	Milton	Active	DEACTIVATE
Moffat	Moffat	Active	DEACTIVATE
Rockwood	Rockwood	Active	DEACTIVATE

CANCEL **SAVE**

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Adding a Branch

The **ADD NEW BRANCH** button located in the Browse Branches section of the *Insurer Management* screen and is available only when the Insurer details have been previously completed and validated through the HCAI Helpdesk:



The screenshot shows the HCAI web application interface. At the top, there's a navigation bar with tabs for 'PLANS', 'INVOICES', 'CLAIMS', 'SEARCH', and 'MANAGE'. The 'MANAGE' tab is active. Below this is a search bar for claim numbers and a 'LOGOUT' button. The main content area is titled 'INSURER MANAGEMENT' and shows the 'Branch Details' form for 'KOH Global Re'. The form includes fields for Branch Name, Branch ID, Address, City, Province (a dropdown menu currently showing 'ON - Ontario'), Postal Code, Phone, Fax, and contact information for two contacts. A 'Branch Status' field is set to 'Active'. At the bottom of the form are 'CANCEL' and 'SAVE' buttons. The footer contains copyright information and links for 'Privacy Policy' and 'Change Password'.

To add a new branch:

1. Click **ADD NEW BRANCH**. The *Branch Details* screen appears with empty fields waiting to be filled with Branch details. The Branch Status value is “Active.”
2. Type in the Branch name as assigned by the Insurer. The name is to contain no more than 50 characters.
3. Specify the Branch ID. The ID is the unique Branch identifier provided by the Insurer.
4. Enter the address of the Branch, 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.

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

If the Branch information is validated, you are returned to the form with a message, indicating the successful creation of the Branch entity.

To clear the form and reload the *Branch Details* screen, click **CANCEL**.

After you have created and saved a new Branch, the **ADD BRANCH** button appears at the top of the *Branch Details* screen:

KOH Global Re HCAI

PLANS INVOICES CLAIMS SEARCH **MANAGE** ? - User Manual

Search for Claim Number in All Forms Exact Match **GO** [Advanced](#) **LOGOUT**

INSURER MANAGEMENT **USER MANAGEMENT** **REPORTS** Welcome, Rafa to HCAI.

2011/03/03

Insurer Management > KOH Global Re > Branch Details

Fill in the fields to add or edit an Insurer
NOTE: All fields with an asterisk (*) are required.

Add / Edit / View Details of "GeFilte" **DEACTIVATE** **ADD BRANCH**

New Branch created.

Branch Status: Active

* Branch Name:

* Branch ID:

* Address:

* City:

* Province:

* Postal Code:

* Phone:

Fax:

Contact One Name:

Contact One Phone:

Contact One E-mail:

Contact Two Name:

Contact Two Phone:

Contact Two E-mail:

CANCEL **SAVE**

Associated Adjusters **ADD NEW ADJUSTER**

Adjuster ID	Adjuster Name	Status

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To add another branch:

- Click **ADD BRANCH** to add another Branch. This clears the form and you can enter information required to create another Branch entity, as described above.

Searching for a Branch in the Insurer Management screen:

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

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

- To sort by the Branch name, click the “Branch 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’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.

KOH Global Re **HCAI** [? - User Manual](#) [LOGOUT](#)

PLANS INVOICES CLAIMS SEARCH **MANAGE**

Search for Claim Number in All Forms Exact Match [GO](#) [Advanced](#)

INSURER MANAGEMENT USER MANAGEMENT REPORTS Welcome: Rafta to HCAI

2011/03/03

Fill in the fields to add or edit an insurer
NOTE: All fields with an asterisk (*) are required.

Insurer Details [DEACTIVATE](#)

Insurer Status: Active

* Insurer Name: KOH Global Re

* IBC ID: KOH

* Address: 3 KOH Drive

* City: Milton

* Province: ON - Ontario

* Postal Code: L9T 2E4

* Phone: (416) 445-5912

Fax:

Contact One Name:

Contact One Phone:

Contact One E-mail: kohlggins@ibc.ca

Confirm Contact One E-mail: kohlggins@ibc.ca

Contact Two Name:

Contact Two Phone:

Contact Two E-mail:

Confirm Contact Two E-mail:

Configuration Management

* Virtual Insurer?: No Yes

* Outbound Payment Feed?: No Yes

* Inbound Claim / Claimant Feed?: No Yes

* Outbound Insurer Extraction?: No Yes

* Privacy Consent?: No Yes

Browse Branches [ADD NEW BRANCH](#)

▲ Branch Name	► City	Status	
Acton	Acton	Active	DEACTIVATE
Dudko	Milton	Active	DEACTIVATE
Moffat	Moffat	Active	DEACTIVATE
Rockwood	Rockwood	Active	DEACTIVATE

[CANCEL](#) [SAVE](#)

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Updating a Branch

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

Deactivating/Reactivating a Branch

1. Select a required Branch from the list in the Browse Branches section of the *Insurer Management* screen.
2. Click the **DEACTIVATE** button next to the Branch to deactivate. This Branch is successfully deactivated if all of the Adjusters associated with the Branch have been deactivated and there are no outstanding plans or invoices that require approval. Upon successful deactivation of the Branch, the **DEACTIVATE** button is replaced by the **ACTIVATE** button.



Browse Branches			ADD NEW BRANCH
Branch Name	City	Status	
Acton	Acton	Active	DEACTIVATE
Dudko	Milton	Deactivated	ACTIVATE
Moffat	Moffat	Active	DEACTIVATE
Rockwood	Rockwood	Active	DEACTIVATE

If the Branch cannot be deactivated by this process because there are associated Adjusters in an active state, click on the name of the Branch and proceed to the *Branch Details* screen.

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PLANS | INVOICES | CLAIMS | SEARCH | **MANAGE** ? - User Manual

Search for Claim Number: In: All Forms Exact Match

INSURER MANAGEMENT | USER MANAGEMENT | REPORTS Welcome, Rafa to HCAI

2011/03/03

Fill in the fields to add or edit an Insurer
NOTE: All fields with an asterisk (*) are required.

Insurer Details

Insurer Status: Active

* Insurer Name:

* IBC ID:

* Address:

* City:

* Province:

* Postal Code:

* Phone:

Fax:

Contact One Name:

Contact One Phone:

Contact One E-mail:

Confirm Contact One E-mail:

Contact Two Name:

Contact Two Phone:

Contact Two E-mail:

Confirm Contact Two E-mail:

Configuration Management

* Virtual Insurer?: No Yes

* Outbound Payment Feed?: No Yes

* Inbound Claim / Claimant Feed?: No Yes

* Outbound Insurer Extraction?: No Yes

* Privacy Consent?: No Yes

Browse Branches

Branch Name	City	Status	
Acton	Acton	Active	<input type="button" value="DEACTIVATE"/>
Dudko	Milton	Active	<input type="button" value="DEACTIVATE"/>
Moffat	Moffat	Active	<input type="button" value="DEACTIVATE"/>
Rockwood	Rockwood	Active	<input type="button" value="DEACTIVATE"/>

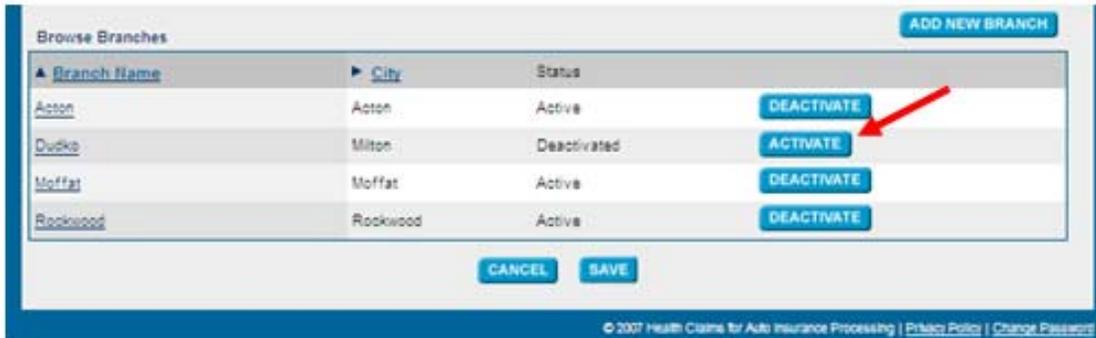
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To deactivate from the *Branch Details* screen:

1. Go to the Associated Adjusters table at the bottom of this screen and review the status of all Adjusters associated with the Branch.
2. Deactivate any remaining Adjusters by selecting the button. Deactivating Adjusters is only possible if all of the Claimants associated with all the Adjusters are deactivated and there are no outstanding plans or invoices that require approval.
3. After you have deactivated all Adjusters, click the button at the top of the *Branch Details* screen.
4. Click <OK> in the confirmation dialog box that appears. The Branch is deactivated.

To reactivate a deactivated Branch:

1. Select the desired Branch from the list in the Browse Branches section of the *Branch Details* screen.
2. Perform one of the following actions:
 - Click **ACTIVATE** next to the selected Branch. Upon successful activation of the Branch, the **ACTIVATE** button is replaced by the **DEACTIVATE** button.



OR,

- Click on the name of the Branch to proceed to the *Branch Details* screen and activate the Branch.

⚠ Note: Activating a deactivated Branch does not activate any Adjusters associated with the Branch. Each Adjuster must be activated individually.

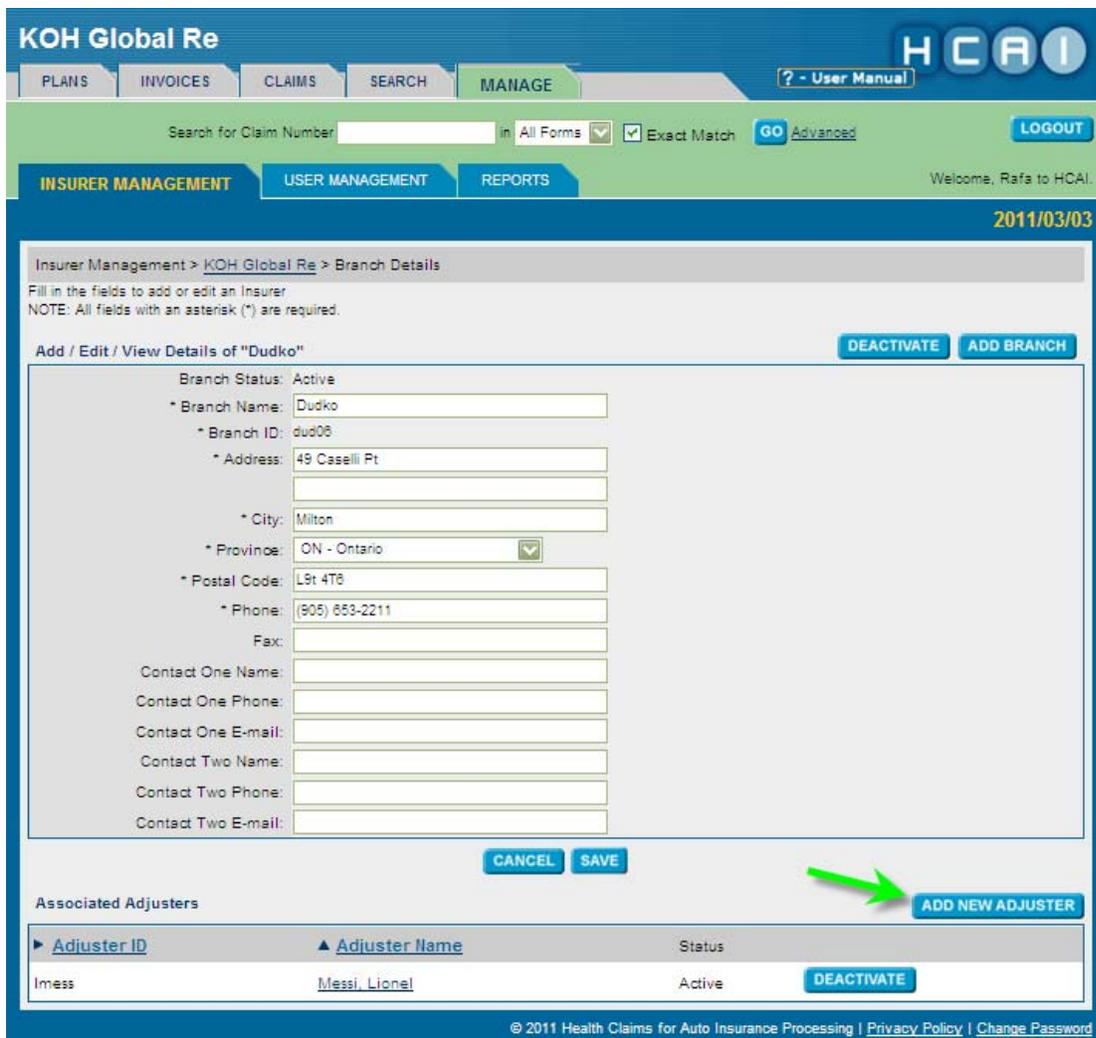
Insurer Adjuster Management

This section describes how to search, add, update, deactivate and reactivate an Adjuster in HCAI.

The Adjuster Management functionality is found in the Insurer Management module, which is accessible from the Manage tab on the Insurer home page. Click on the Manage tab. If the Insurer Management sub tab is not the resulting default selection, select it. At the top of the page, the "Select Insurer" drop-down list contains one or more Insurer companies, depending on your role in HCAI. Selecting an Insurer from the list refreshes the Browse Branches section in the bottom of the screen to contain all Branches associated with the selected Insurer. Selecting a Branch from the list displays the Branch information and a list of associated Adjusters.

Adding an Adjuster

The **ADD NEW ADJUSTER** button located in the Associated Adjusters section of the *Branch Details* screen is available only when the Branch details have previously been provided and validated.



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PLANS INVOICES CLAIMS SEARCH **MANAGE** ? - User Manual

Search for Claim Number: in All Forms Exact Match

INSURER MANAGEMENT USER MANAGEMENT REPORTS Welcome, Rafa to HCAI.

2011/03/03

Insurer Management > KOH Global Re > Branch Details

Fill in the fields to add or edit an Insurer
NOTE: All fields with an asterisk (*) are required.

Add / Edit / View Details of "Dudko"

Branch Status: Active

* Branch Name:

* Branch ID:

* Address:

* City:

* Province:

* Postal Code:

* Phone:

Fax:

Contact One Name:

Contact One Phone:

Contact One E-mail:

Contact Two Name:

Contact Two Phone:

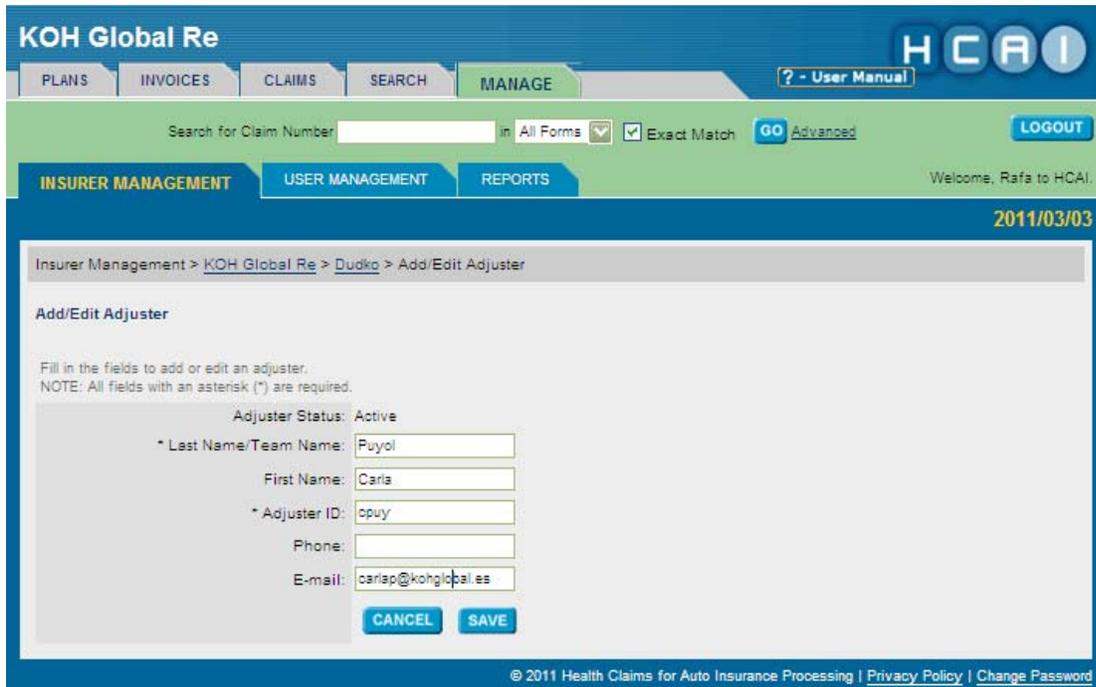
Contact Two E-mail:

Associated Adjusters

Adjuster ID	Adjuster Name	Status	
Iness	Messi, Lionel	Active	<input type="button" value="DEACTIVATE"/>

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Click **ADD NEW ADJUSTER**. The *Add/Edit Adjuster* screen appears for you to fill in Adjuster details. Because you are creating a new Adjuster, the Adjuster status is “Active” by default.



- Enter the last name of the Adjuster or the name of the Adjuster team / unit / workgroup in the “Last Name/Team Name” field.
- Enter the first name of the Adjuster in the respective field Specify the Adjuster ID. The ID is the unique Adjuster identifier provided by the Insurer.
- Enter the phone number and email address of the Adjuster in the respective fields, if desired.
- Click **SAVE** to save the Adjuster information.

If this information is incomplete or invalid, you are returned to the *Add/Edit Adjuster* screen, with an error message at the top identifying the field name(s) that are not complete or valid. You must correct the information and save the Adjuster information again.

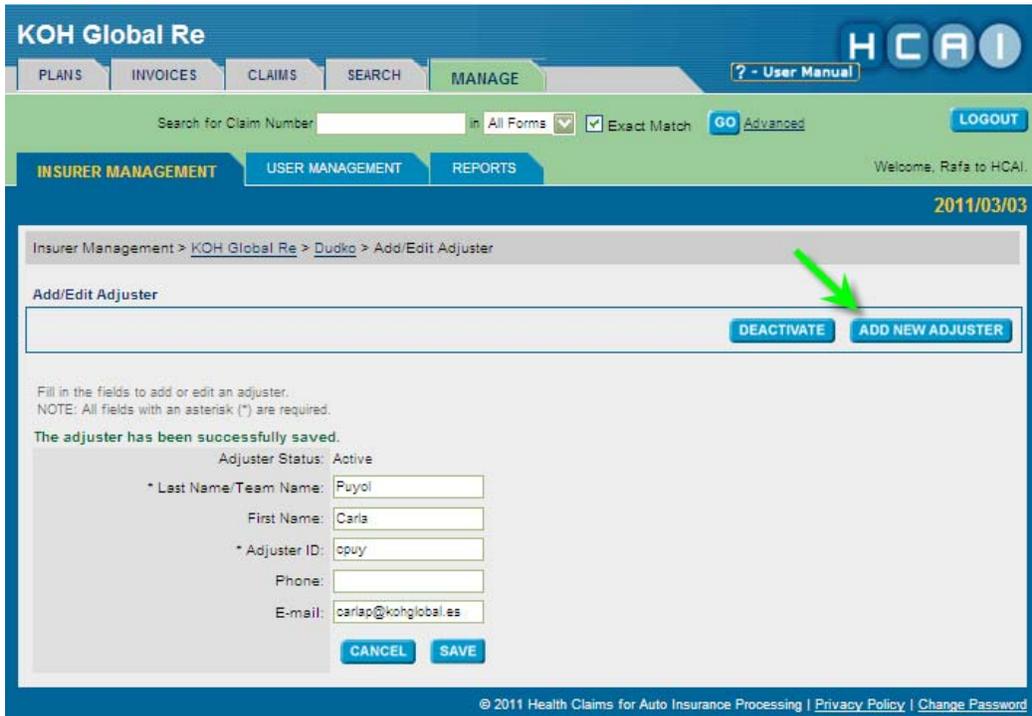
If the Adjuster information is validated, you are returned to the *Add/Edit Adjuster* screen with an inline message, indicating the successful creation of the entity.

To reload the *Add/Edit Adjuster* screen, click **CANCEL**.

1. After you have created and saved a new Adjuster, the **ADD NEW ADJUSTER** button appears at the top of the *Add/Edit Adjuster* screen:

To add another Adjuster:

- Click **ADD NEW ADJUSTER**. This clears the form and you can enter the information required to create another Adjuster entity, as described above.



Searching for an Adjuster

In the *Add/Edit Branch* screen:

- Go to the Associated Adjusters section. This section contains a list of Adjusters associated with a given Branch.



You can sort the Associated Adjuster list to facilitate the search:

- To search by the Adjuster ID, click the “Adjuster ID” column header. This sorts the Adjuster entries in ascending alphanumerical order. Click it again to sort the list in descending order.
- To search by the Adjuster name, click the “Adjuster Name” column header. This sorts the names in ascending alphabetical order. Click it again to sort the list in descending order.

Updating an Adjuster

1. Search for the desired Adjuster in the associated Adjuster list.
2. Click on the name of the Adjuster in the “Adjuster Name” column (which is a link) to proceed to the *Add/Edit Adjuster* screen.

Associated Adjusters			ADD NEW ADJUSTER
Adjuster ID	Adjuster Name	Status	
JBen	Beneer, Jill	Deactivated	ACTIVATE

3. In this screen, update the Adjuster details as required.

HCAI

? - User Manual

LOGOUT

Welcome, Raul to HCAI

2009/09/03

INSURER MANAGEMENT USER MANAGEMENT

Insurer Management > Gainsborough Trinity P&C > Speyside > Add/Edit Adjuster

Add/Edit Adjuster

DEACTIVATE ADD NEW ADJUSTER

Fill in the fields to add or edit an adjuster.
NOTE: All fields with an asterisk (*) are required.

The adjuster has been successfully saved.

Adjuster Status: Active

* Last Name/Team Name:

First Name:

* Adjuster ID:

Phone:

Email:

CANCEL SAVE

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4. To validate and save the details, click **SAVE**. If any of the fields are incomplete or contain invalid information, your changes are not saved and you are returned to the *Add/Edit Adjuster* screen.
5. To exit the form, click **CANCEL**.

Deactivating/Reactivating an Adjuster

Search for the desired Adjuster in the associated Adjusters list.

Click the **DEACTIVATE** button next to the Adjuster to deactivate. Upon the successful deactivation of the Adjuster, the **DEACTIVATE** button is disabled.

To activate a deactivated Adjuster:

- Search for the desired Adjuster in the associated Adjusters list.
- Select the desired Adjuster from the list in the Associated Adjusters section of the *Add/Edit Adjuster* of Branch screen.
- Click **ACTIVATE** next to this Adjuster in the list. On the successful activation of the Adjuster, the **ACTIVATE** button is replaced by the **DEACTIVATE** button.

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PLANS INVOICES CLAIMS SEARCH **MANAGE** [? - User Manual](#)

Search for Claim Number: in All Forms Exact Match [Advanced](#)

INSURER MANAGEMENT USER MANAGEMENT REPORTS Welcome, Rafa to HCAI.

2011/03/03

Insurer Management > KOH Global Re > Branch Details

Fill in the fields to add or edit an Insurer
NOTE: All fields with an asterisk (*) are required.

Add / Edit / View Details of "Acton"

Branch Status:	Active
* Branch Name:	<input type="text" value="Acton"/>
* Branch ID:	<input type="text" value="Acton_ON"/>
* Address:	<input type="text" value="2 Speyside Way"/>
* City:	<input type="text" value="Acton"/>
* Province:	ON - Ontario
* Postal Code:	<input type="text" value="L2P 6p2"/>
* Phone:	<input type="text" value="(905) 331-3239"/>
Fax:	<input type="text"/>
Contact One Name:	<input type="text"/>
Contact One Phone:	<input type="text"/>
Contact One E-mail:	<input type="text"/>
Contact Two Name:	<input type="text"/>
Contact Two Phone:	<input type="text"/>
Contact Two E-mail:	<input type="text"/>

Associated Adjusters

Adjuster ID	Adjuster Name	Status	
JBen	Beneer, Jill	Deactivated	<input type="button" value="ACTIVATE"/>
ADeg	Deas, Alberto	Active	<input type="button" value="DEACTIVATE"/>
MEID	DeGut, Melanie	Active	<input type="button" value="DEACTIVATE"/>
JEet	Eet, Johnny	Active	<input type="button" value="DEACTIVATE"/>
MOli	Olivier, Marco	Deactivated	<input type="button" value="ACTIVATE"/>
PThor	Thornbury, Pamela	Deactivated	<input type="button" value="ACTIVATE"/>

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OR,

- Click on the Adjuster name link to proceed to the *Add/Edit Adjuster* screen.
- Click the button at the top of the *Add/Edit Adjuster* screen to reactivate the Adjuster. The button becomes disabled.

 **Note:** Activating a deactivated Adjuster does not activate any Claimants associated with the Adjuster. Each active claim should be reassigned to another Adjuster or deactivated before deactivating an Adjuster.