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CHAPTER 3 - CONTROL PANEL FUNCTIONS

Administration management

The access to the **"Administration Management"** module is done via a specialized "control panel" interface which aims at ensuring that the operator will control each of the relevant administrative information.
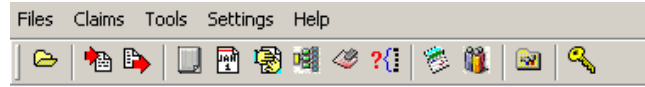
Preferences

The [icon] button will give the user the opportunity to set is personal preferences of operation. The reader is invited to browse through the various tabs as he will be able to define the work space to fit his needs.
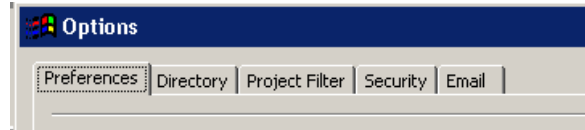
Company files

The open file [icon] button will provide you with a general viewing and access to your various files under management.
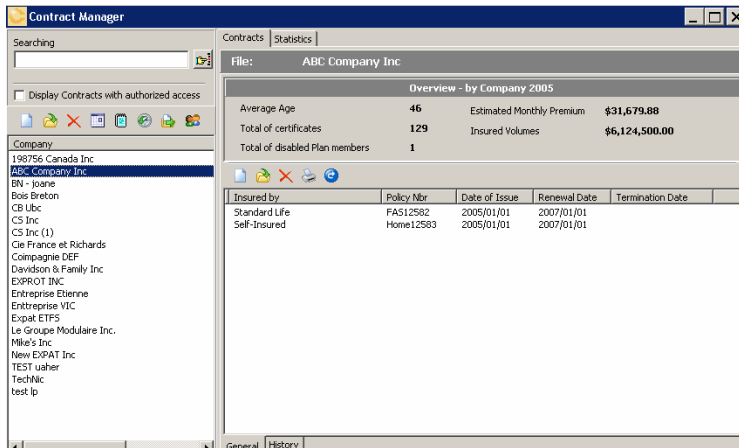
This information is created automatically from your daily activities.

It will thus be easy for you to consult the various panels and tabs to obtain or manage quickly and effectively your essential information.

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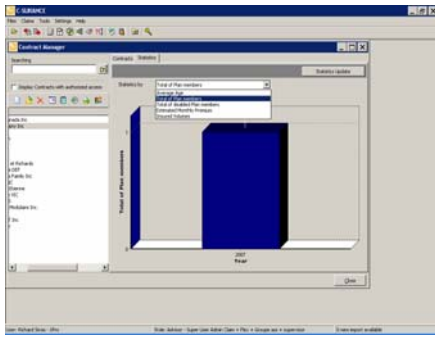
You can explore the various top and bottom tabs, as well as control buttons to appreciate the available information.
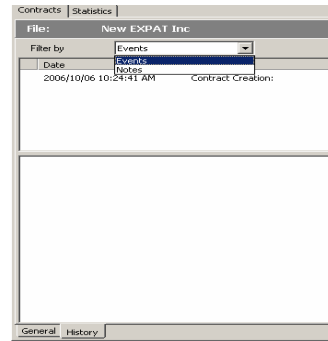
Company control buttons

The left portion of your screen provides access to each of your files under management as well as the various activities options.

You can search for your company using any portion of the name of the enterprise.
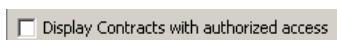
File can be defined as private or public. Checking the "Display Contracts with authorized access" will include the public contracts to your own personal files.
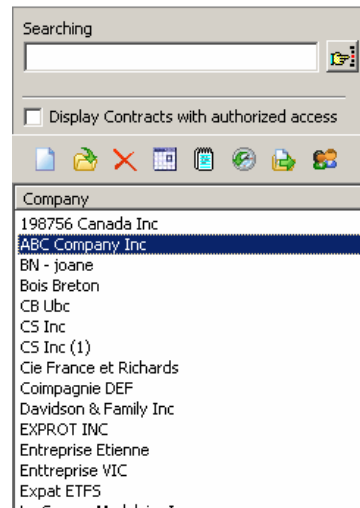
 New

  To create new companies file.

 Access a file

  To access a file you can either double click on the file name or use this open button

 Delete company file

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Delete company file will permanently remove the selected file from you data bank and cannot be retrieved. A warning will appear to remind you before you accept the deletion.

Add a reminder note

Add a reminder note and recall date to your C-surance.ca agenda. This reminder will be associated to the selected company file.

Add a note to a file

Add a note to a file. Once this note is created it cannot be deleted or edited.
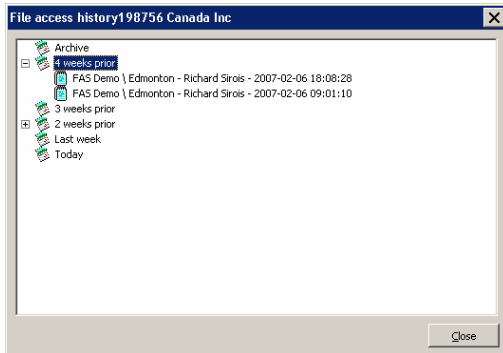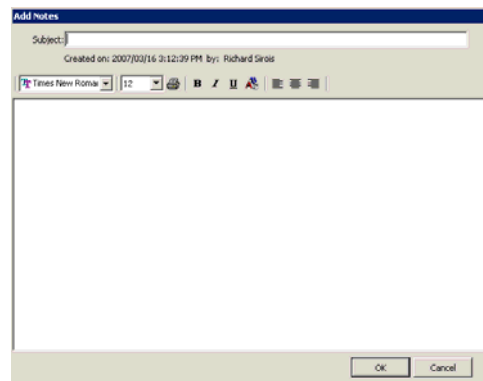
Log

The access log button will provide information on recently accessed files.

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Convert a contract into a project

This button [icon] will allow to you to easily convert a contract into a project. Once selected you will be guided in a step by step procedure to insure that all the needed information will be transferred to the sales module.

You will first need to identify the specific contract that needs to be converted.
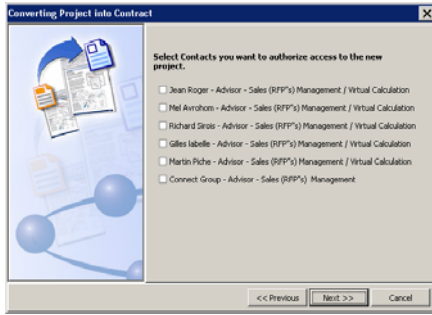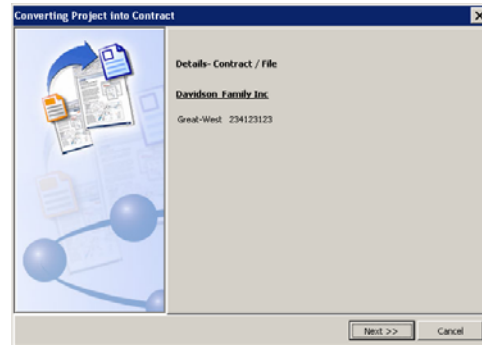
You will then be invited to select the dedicated user that will take over the market evaluation processes and finally define the needed dates.
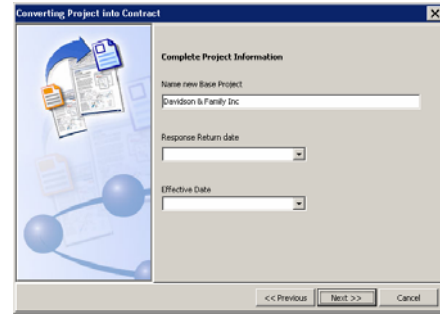
Create internet accounts

C-surance.ca provides an easy tool to create internet accounts for the individual member. This option will provide an easy process to manage each of these accesses.

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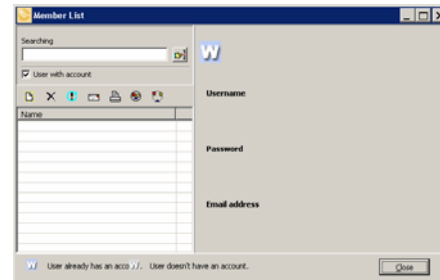
Contract information
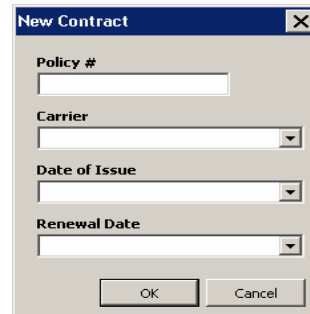
For each file, you can create or manage one or more distinct contracts.

"New" button

The "**New**" button will make it possible to create new contract to be added to an exiting file.
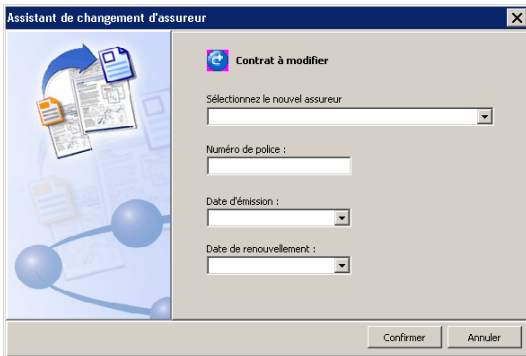
Carrier change

The « Carrier change » button will insure an easy method for replacing an existing carrier. The wizard will allow you to define the new carrier name, policy number as well as the effective dates. The current carrier policy will be terminated on the effective date of the new contract.

Image a changer pour anglaise, dido pour la suivante avec les noms des assureurs en anglais

The new contract will inherit all of the previous benefit information, rates and premiums. The user will be responsible to update these information to reflect the terms and condition of the new contract and new carrier.

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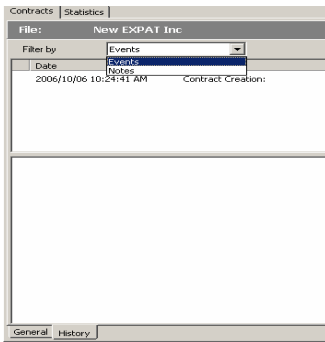
History of events

Two TABs are located at the bottom of the main screen to provide access to:

1. General information which also includes the contract status
2. The history of events which are split into two options:
    a. Events
    b. Notes

Events:

Events are automatically created by the system to keep track of the various activities that were taken by the daily operation.

Notes:

Notes are created by using the [icon] button. Once created these notes are read only.

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Command line Buttons

Files Claims Tools Settings Help

Some of the next described icons are available only as options. Consult your adviser **MDI** to obtain more information.

Open files - Screen gives access to the list of your personal contracts as well as the public contracts when the selected option is activated.

Import Export options - These buttons allow for import and export of files from the Allegroupe private network module.

Billing process manager – This option provides all the needed tools to follow up on billing activities.

Payroll deduction - This option provides all the needed tools to follow up on employer/employee management activities.

Renewal manager - This option provides all the needed tools to follow up on renewal activities.

Claims manager - This option provides a direct access to the adjudication module.

Change request manager - This option provides all the needed tools to follow up on request for changes that are made by supervised users. This is available to SUPERVISOR only.

Electronic agenda to insure follow up of all C-surance.ca activities. This is a private agenda to the owner of the various files.

User Hierarchy – gives access to a management screen allowing full control over the list of all lower level users, the names of their files, their projects, the effective dates as well as their status.

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Role Change (if applicable) allow for switching between assigned roles.

Usage Statistics – provides a quick access to the monthly usage information for each user including the number of access and minutes. A sub-menu makes it possible to select previous years for comparative purpose.

Preferences – Allows defining your operating preference:

- Posting of the public files
- Posting of all authorized projects
- Selecting the Font style and size
- Selecting language of operation.

Hierarchy management

This option is designed for larger operators who will need to manage various levels of users. Using this tool a user can control the access of any files that are managed by lower levels. A user cannot access files of equivalent or superior level unless the files are assigned as "**public**".
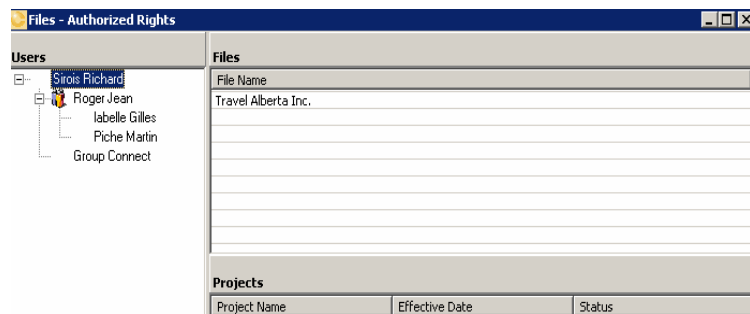
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Billing process manager –

This option provides all the needed tools to follow up on billing activities.

Various selection types are available to address your specific needs or method of work.

"Today's date" as well as "Week" will automatically keep the current files to be billed available on your screen, while the "Period" option will provide you with a effective date selection. Once these dates are selected you must click on the process button to get your needed list.

Payroll deduction -

This option provides all the needed tools to follow up on employer/employee management activities.

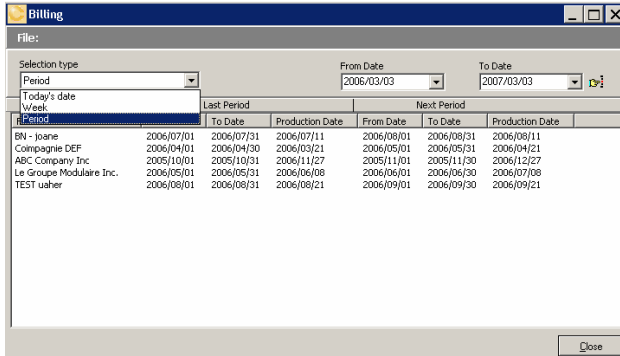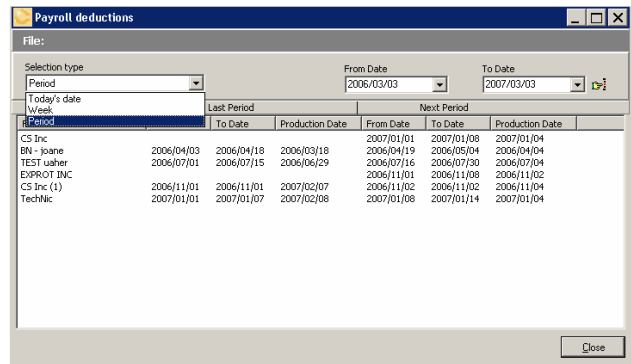Various selection types are available to address your specific needs or method of work.

"Today's date" as well as "Week" will automatically keep the current files to be billed available on your screen, while the "Period" option will provide you with a effective dates selection. Once these dates are selected you must click on the process button to get your needed list.
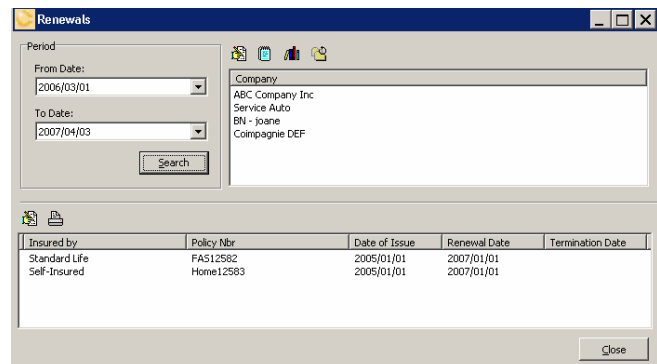
Renewal manager –

This option provides all the needed tools to follow up on renewal activities.

You need to select the period dates and then click on "Search".

You can then access the individual company file by clicking on the company name or any of their contracts by clicking on the actual contract.

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?{: Change request manager -

This option provides all the needed tools to follow up on request for changes that are made by supervised users. This is available to SUPERVISOR only. Please explore the "Supervised Change request" documentation to view the supervised options and interfaces.
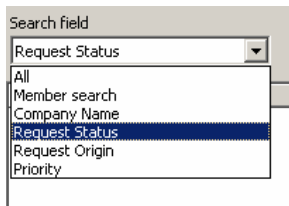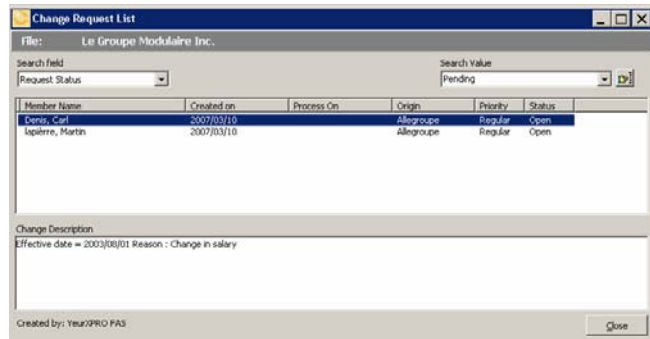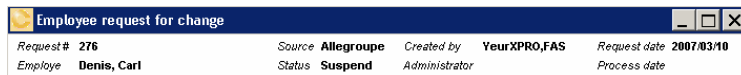

The lists are available based on various search fields or search values that adapt to the various needs of users.
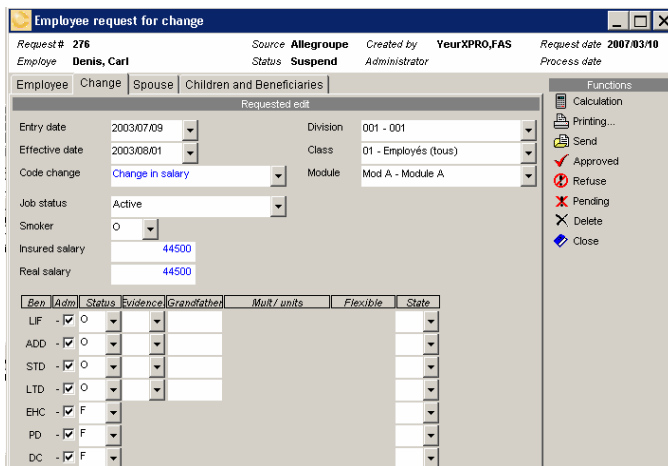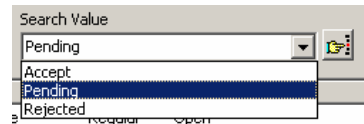
Once you have selected an item, the system will display that information in the same format as the supervised user created the request for change.

The light bleu color will highlight the changes that where requested.

The top banner includes very important information on the displayed transaction. The transaction number, the source, the involved users as well as the dates of process are available to insure tracking of activities.
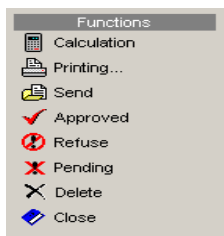
The supervisor will have a list of various actions that can be taken on each request for changes. Including Approval, Refusal, keep pending, delete, calculate or print.
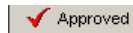
 Once "approved" the change will become active in real time and will be added to the employee list of movement.

The object of this tool is to overview every request for changes that were made by supervised users.

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Supervised Change request

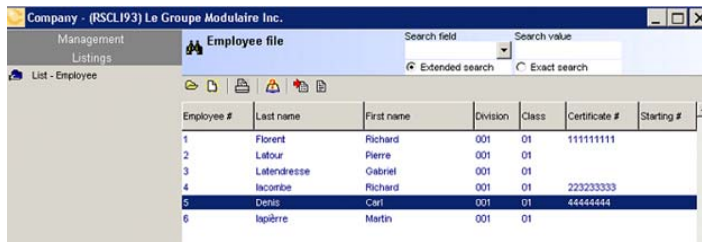## Supervised Change request

An authorized user can make request for changes that will be supervised.

In order to ease the processes for the supervised user, C-surance.ca will provide a simplified interface.

For one the user will get a subset of the **◄ ► ✚   ▼** standard available change and management options.

These will limit his activities to:

- Viewing history event by using the **<** and **>** arrows

- **To creation of a request for change when clicking on the ✚ instead of making a change**.

.
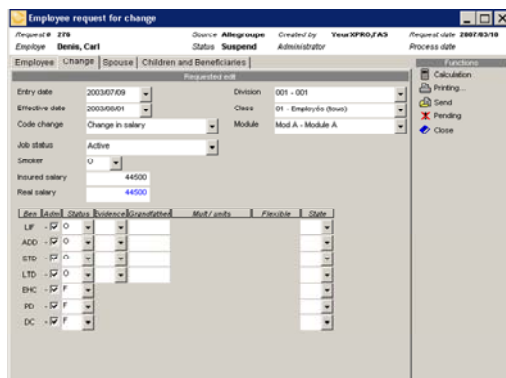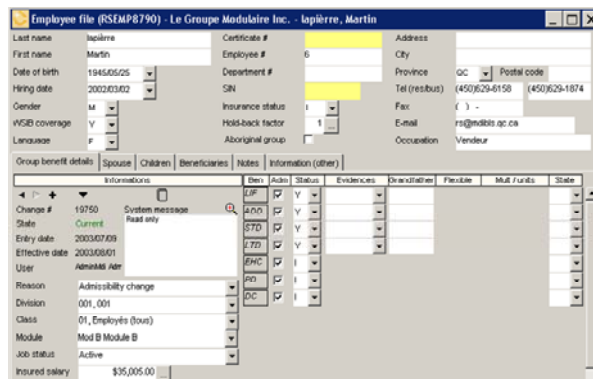
Clicking on the **✚** button will display a new simplified screen with 4 tabs options.

Each of these tab options will provide the user with the opportunity to make any required changes.

The user will also be presented with 5 available functions. The first will allow for a quick Calculation of the displayed file. This is can be useful to get before and after scenarios or to create "what if" scenarios.

Once calculated the printing option will provide with an individual member real time report.

Once the task is completed the user can select to either:
- "Send" the request for change to the supervisor
- Leave the transaction "pending" for further awaiting for further instruction from the member or
- "Close" the transaction ignoring all requested changes.

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