

viaOne intake[®]

Web User Guide for Clients



Application Guide



sedgwick university

Client Edition

Version 1.7

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viaOne intake Training

Guide for Client Web Users: Logging onto viaOne intake and Starting a New Claim

Minimum System Requirements :

Installing viaOne intake requires minimal end-user desktop configuration. The environment is certified for use with **Microsoft's Internet Explorer 5.5 or 6.0 browser on Windows Operating Systems (98 and above)** and will require the installation of **Active X controls**. You may need help from your local Information Technology contact or administration rights to complete the install.

Website: Access the Main Login Screen of **viaOne intake** via the internet at: <https://sedgwickcms.claimcapture.com/>

Logging In: Your login/user id will be in all lowercase letters. Enter your login and password into the corresponding fields hit the **“Enter Key”** or click on the **“Log On”** button to start the claims intake process. Requests for login/user id information should be coordinated through your Sedgwick account manager or designated contact.

First Time Users Password: When you login for the first time your password should be **“PASSWORD”** in all upper case letters. You will then be prompted to change your password once you have logged in. Your new password will need to include both upper and lower case letters as well as numbers for security purposes and will need to include 8 characters minimum.

Forgotten Passwords: If you enter the wrong password an option to **“Request password”** will appear and your password will be sent to you by email if selected. You will have 3 attempts before you are potentially locked out. If you do get locked out of your account you can call the Help desk.

What if I need help with or technical support or passwords? You can call the **Help Desk at 888-290-0895** for further assistance. The Help Desk is staffed with live personnel from IFN (Innovation First Notice) from 8am to 5pm Mon-Friday CST and will be able to unlock your account or assist with any technical issues you may have.

Once you login and select **“Claim Entry”** on the **Home page** you will be brought to the **Start Call** frame. Fill in the requested information and select the **“File a New Claim”** button to start a new claim. Remember that **Bold text is Mandatory**. You will not be able to select the **“File a New Claim”** button or **Submit** a claim to **viaOne** unless each of the mandatory fields in the claim are filled in.

*Important Note: there is a **time out feature**. If you leave a new claim idle for 20 minutes the application will time out and the system will cancel the claim. It will be necessary to begin a new claim if this occurs.*

Welcome to Internet Reporting

Contract Number: 9999 Contract Name: GENERIC CLIENT

Reported by First Name: JOHN

Reported by Last Name: SMITH

Reported by: I - Internet

Line of Business: Select a LOB

Loss Date: / /

Loss Time: : : M

File a New Claim

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NAVIGATION

Abort

<< Prev | Next >>

Submit Claim

Pend this Claim

Navigation bar: Once in the claim if your Navigation section displays **<<Previous | Next >>** in the blue navigation bar you are in the **Call Flow** and can use the **“Tab”** button to navigate forward to the next frame. If it does not display **<<Previous | Next >>** the **“Tab”** button will not move you to the next frame. You can also use the **“Alt”** function keys to move to the **Previous** or the **Next** frame.

You can choose to **“Cancel”** a claim at any time during the claim entry process. To submit a claim, however, you will need to progress through the entire claim entry process and use the **“Close”** button on the final Closing Script frame before a claim can be submitted to viaOne.



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Guide for Client Web Users: Caller Information Frame and Lookup Functions

Instructions for using the Lookup functions on this frame will be found in the blue text above the “Employee Lookup” and “Location Lookup” buttons.

Note: The “Employee Lookup” will only appear if your company has provided Sedgwick with a Human Resources feed

The **Prompt** will display instructions and help based upon the field you in currently in. This will be the field highlighted in yellow throughout the entire intake process.

Searching in the Lookup features: Enter the search criteria in the corresponding field(s) and then initiate the search by selecting the **Search** feature by pressing “Alt+C”. The system will now perform a search filtering the results based on the criteria that was entered. *Hint: Make sure there are not any extra “spaces” after your search criteria since the function will recognize the space as a character to search by. Ex search by “John” not “John_” with a space after John.*

Wild Card Search “%” If you are not sure of the spelling of a name, address, or have only part of a unit name you can use the “%” sign to replace any character in the search field. This will search the database for *any* name with those characters in it, regardless of where they fall within the name. (“%union” will return results with “union” in any part of the field such as “123 Union St”, or “ABC Company Union Dist. Center.”) If you have a partial unit number such as “143” but the unit number is “00143” typing “%143” will pull up any unit with “143” in it.

Records found in the database will appear in the **Records Found** field on the bottom half of the look-up frame. Use the **Up↑** or **Down↓** arrows on your keyboard to highlight the desired record. Enter “Alt+S” to **Select** that location. You will then be taken to the **Client/ Location Information** frame. If you cannot find you location you may try the **Reset Search** button and try searching again .

If you cannot find your location select “**Quit Without Selecting.**” and viaOne intake will ask you to “Temp” the claim. This means that the location information will need to be keyed manually. If the location needs to be added please contact your Sedgwick representative about having the location loaded in the application. **Important Note: If you do not select a location your client specific questions will not be enabled in the script and the claim will not disseminate to the assigned handling office.**

Account Name	Unit Number	Unit Name	Address	City	State	Zip
GENERIC ACCOUNT	1234	GENERIC UNIT	123 MAIN ST	MEMPHIS	TN	38118

Wild Card Search = “%” plus search criteria.



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Guide for Client Web Users:

Address Book, Comments/ Remarks and Summary Frames

How do I use the Address Book “Alt + B”

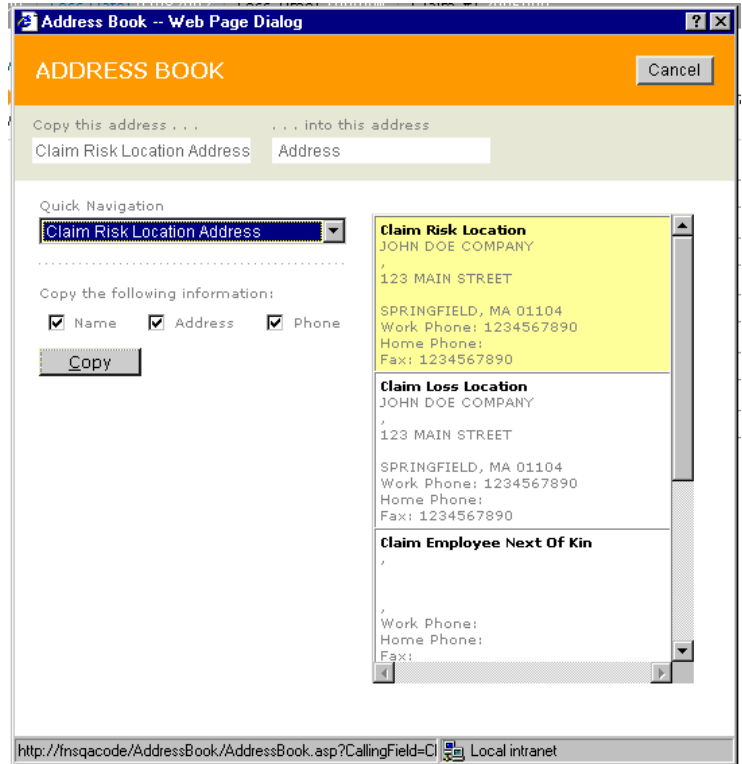
The address book can be accessed at any time throughout the call by using the “Alt+B” function. Once the **Name, Address, City, State Zip-Code** or **Phone Number** that you’re looking to copy is highlighted, simply copy the information into your current fields by using the “Alt+C” function.

In this example, we’ve chosen to copy the Claim Risk Location address information into the call from the address book. This field is highlighted in yellow. Additionally, the Name, Address, & Phone options are selected with a check mark.



The check mark in the box indicates the information will be copied. Press “Alt+C” to Copy the information into the **Call Flow** fields.

To copy only select parts of the address, remove the check from the appropriate box before pressing “Alt+C” to Copy.



How do I include a note to my examiner? “Alt+3” = Show Notes.

This function will take you directly to the notes at any time during the intake process, and “Alt+R” will return you to the exact spot in the **Call Flow** prior to navigating to the **Comment/Remarks** frame.

Comments/Remarks should include any notes that will be pertinent to the examiner. The information will be included as part of the permanent claim record when the claim is submitted.

Internal Comments will not be included the data sent to the examiner when the call is submitted. If you attempt to Cancel a claim the **Internal Comments** field will require a reason be entered.

Both comment fields will hold 2000 characters.

How do I use the Summary frames?

When navigating the **Call Flow** you will come across various **Summary frames**. If there is no information available for the involvement you may use “Tab” and it will take you forward to the next frame without requiring input of data into the **Summary Detail** frame. “Shift + Tab” will take you to the previous frame.


To add a new involvement for that frame use your mouse or the “Space bar” to select “New” and answer the questions that appear to create an involvement in the detail sub frame. To “Edit” an involvement in the **Summary frames** you must select the “Magnifying Glass” with your mouse, and to “Delete” an involvement you must select the red “X” button with your mouse.

Selecting the “Additional” button will cause an identical frame to appear on the screen where an unlimited number of involvements can be created. Once you have completed each involvement be sure to the select “Return to Call Flow” button.



Additional Witness?

Return to Call Flow



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Guide for Client Web Users:

Web User Quick Key Functions and Field Guide

viaOne intake Quick Keys Guide

TAB = FIELD FORWARD
SHIFT+TAB = FIELD BACKWARD
SPACE BAR = CLICK ON THE BUTTON
◀**Backspace** button = ERASE FIELD
ALT + 3 = NOTES
ALT + B = ADDRESS **B**OOK
ALT + C = SEARCH, CANCEL, COPY
ALT + L = **L**OCATION LOOKUP (POLICY LOOKUP)
ALT + N = **N**EXT FRAME, **N**ON-DUPLICATE
ALT + D = **D**UPLICATE
ALT + P = **P**REVIOUS FRAME
ALT + Q = QUIT (WITHOUT SELECTING)
ALT + R = **R**ETURN TO CALL FLOW
ALT + S = **S**ELECT
% = WILD CARD SEARCH LOOKUP FUNCTION
F8 = ZIP CODE LOOKUP
WINDOWS KEY + D = MINIMIZE
ALT + TAB = SWITCH TO ANOTHER APPLICATION

viaOne intake Field Guide

- **Mandatory Fields are in bold**
- Text fields with unknown information should have “Unknown” typed in them.
- Numeric fields (non-mandatory) should be left blank if the information is unknown.
- **Numeric fields (mandatory)** should be populated with all “9”s if the information is unknown.
- **Date fields (mandatory)** should be populated with the date of report if the date is unknown and a note entered into the “**Comments Remarks**” field of the **Notes** Frame.
- **Zip Code (mandatory)** use the first zip code in the city of the incident if unknown.
- Gray fields cannot be changed. These fields will/may become active based upon certain answers to questions throughout the Call Flow.
- Pull/Drop Down Fields: selections on the dropdowns can be chosen using any of these four methods: 1) Entering the first few letters to the left of the description (i.e. “Fall” to view all of the “Slip and Fall” options, or “Y” for yes or “N” for No), 2) The up and down arrows on the keyboard, 3) Entering the code number. 4) Using the mouse.

What if I don't know the answer to a question: Information Fields tags that are *not* in bold text can be left blank. It is recommended, however, that you type “unknown” into any fields that contain text or alpha-numeric numbers to let the claims examiner know that you did not have the information at the time of report.

What if the Tab function is not working and will not advance to the next frame/screen?

Using your mouse in the **Call Flow** Section of the **Navigation** bar to navigate to the different frames will remove you from the **Call Flow** and keep the “**Tab**” button from progressing to the next frame. Look in the **Navigation** bar in the top left to see if it reads “**Return to the Call Flow.**” To correct you should click on the “**Return to Call Flow**” button . If you have navigated away from the Call Flow multiple times, you may need to select the button multiple times until the navigation bar displays <<**Previous** | **Next** >> again.

How do I cancel a claim I have started?

You may select “**Abort**” or “**Cancel.**” If you cancel a claim it will require a note be placed in the “**Internal Comments**” field.

How do I submit a claim to viaOne?

You will not be allowed to submit the claim until you have accessed and viewed the **Closing frame**. Once you have completed entering your claim information into viaOne intake, continue in the **Call Flow** until you come to the final **Closing frame**. It will display the next step instructions and the information for the assigned handling office. On the **Closing frame** choose the “**Close**” button. You will then be prompted “**Are you sure you wish to submit this claim?**” When you select “**OK**” in the prompt, the claim will be submitted to viaOne and the assigned Sedgwick handling office. Upon a successful transmission you will receive a confirmation prompt letting you know the claim has successfully submitted.

*Important Note: If you have left a mandatory field blank or entered data into an information field that does not match the proper format of that field you will be unable to “Close” the claim. The frame containing the error will be indicated by a red dot in the **Call Flow** section of the **Navigation bar**. If you attempt to **Submit** the claim with the error, viaOne intake will take you to the field containing the error and require that the error is resolved before the claim can be submitted.*

*Important Note: Once submitted, the claim information uploads into viaOne and cannot be updated in viaOne intake. The current claim information can only be viewed by those with access to **viaOne view**. Any changes to an existing claim will need to be updated by contacting a customer service agent or the examiner of record at the handling office.*

