

Norbell CRM

User Manual

for

Membership Services & Provider Relationship

Version 1.1

Dated 11th January, 2011

Index

Membership Services

Sr. No	Topics	Page No
1	<u>Admin Interface</u>	4
2	<u>Call Center</u>	5
3	<u>Member Area</u>	6

Provider Relationship

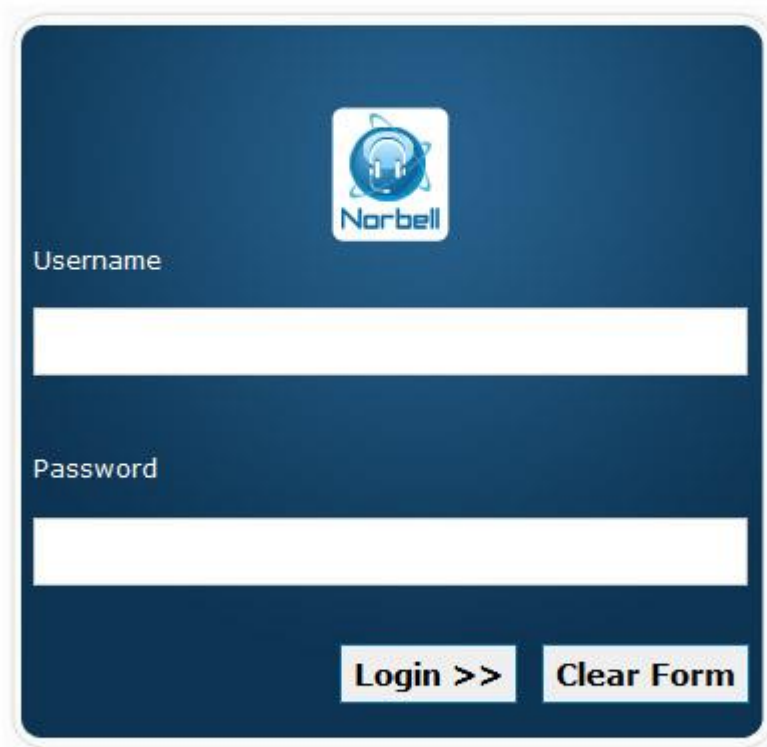
Sr. No	Topics	Page No
1	<u>Admin Interface</u>	8
2	<u>Member Area</u>	9
3	<u>Provider Area</u>	10
4	<u>Stats</u>	11

CRM Membership Services login Page

URL: www.onlinedemo.in/newcrm/

User: msadmin

Password: xxxxxx (password will be provided separately)



Username

Password

Login >> Clear Form

Figure 1: Norbell CRM Membership Services Log in Page

Admin Interface – In this section you can Add/Edit & view User details

- **Add User**
- **View User**

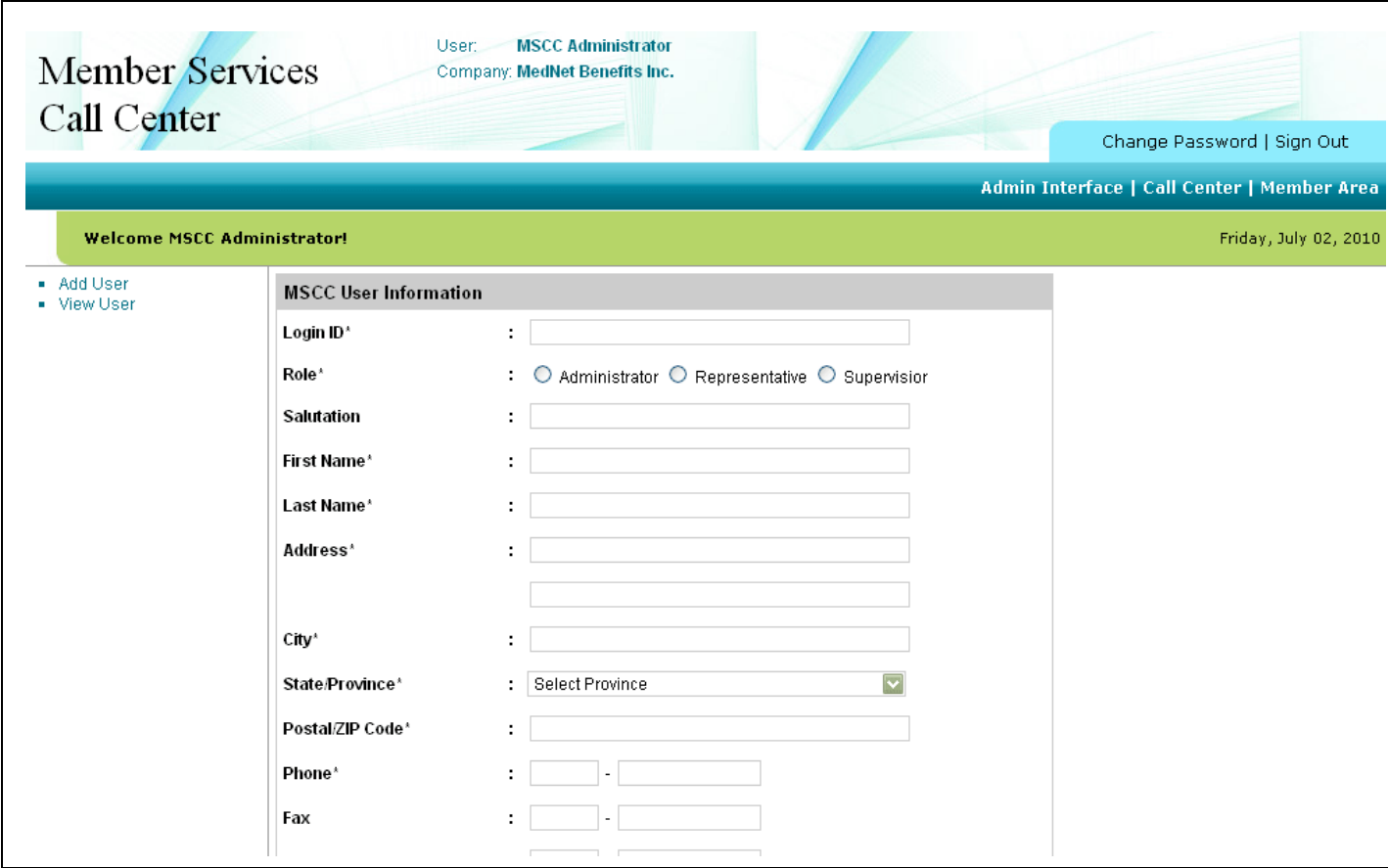


Figure 2: User Add

Call Center -

- Stats
- Home

The screenshot displays the 'Member Services Call Center' interface. At the top, it identifies the user as 'MSCC Administrator' for 'MedNet Benefits Inc.' and provides links for 'Change Password' and 'Sign Out'. A navigation bar includes 'Admin Interface | Call Center | Member Area'. A green banner welcomes the 'MSCC Administrator!' and shows the date 'Friday, July 02, 2010'. On the left, a sidebar contains 'Stats' and 'Home' links. The main content area is divided into four tables:

- Reps On Call**: A table with columns 'Rep', 'Call Type', and 'Length'.
- Idle Reps**: A table with columns 'Rep', 'Login Time', and 'Idle Time'.
- Reps On Current Tickets**: A table with columns 'Rep', 'Ticket Type', and 'Length'.
- Ticket Stats**: A table with columns 'Measure' and 'Value'. The 'Open Grievance Count' is highlighted in blue with a value of 3.

Reps On Call	
Rep	Call Type

Idle Reps	
Rep	Login Time

Reps On Current Tickets	
Rep	Ticket Type

Ticket Stats	
Measure	Value
On Hold Count	0
Open Declined Count	0
Open Grievance Count	3
Open Insurance Claim Count	0
Open Nomination Count	0
Open Request Count	0
Pending Cigna Count	0
Pending Declined Count	0
Pending Galaxy Count	0
Ready Callback Count	0
Urgent Count	0
Pending Count	0

Figure 3: Ticket Summary

Member Area – In this section you can Search Member after that select a member to view his Program Details, Member Info, Membership History, Referral History, Tickets, Notes and can also Add/Update notes.

The screenshot displays the 'Member Services Call Center' interface. At the top left, the user is identified as 'MSCC Administrator' from 'MedNet Benefits Inc.'. Navigation links include 'Change Password | Sign Out' and 'Admin Interface | Call Center | Member Area'. A green banner welcomes the 'MSCC Administrator!' and shows the date 'Friday, July 02, 2010'. On the left is a sidebar menu with items like 'Search', 'Member Search', 'Req(0)', 'Norms(0)', 'Griev(3)', 'Ins(0)', 'On Hold(0)', 'PendMedNet(0)', 'Pend Net(0)', 'Pend Dec(0)', 'Ready(0)', and 'Urgent(0)'. The main content area features a 'Member Search' form with fields for 'First Name', 'Last Name', 'Membership#', 'Alt Membership#', 'Phone', 'Zip Code', and 'Ticket#'. There is an 'Include dependents?' checkbox and a 'Search' button.

Figure 4: Member Area

CRM Provider Relationship login Page

URL: www.onlinedemo.in/newcrm/

User: pradmin

Password: xxxxxx (password will be provided separately)

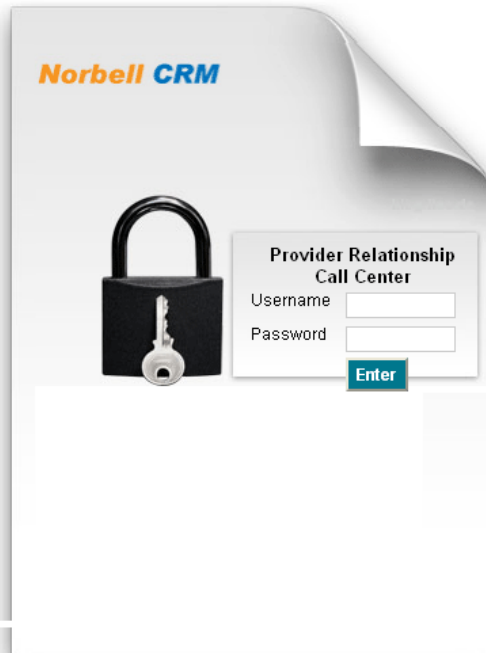


Figure 1: Provider Relationship Login Page

Admin Interface – In this section you can Add/Edit & view User details

- **Add User**
- **View User**
- **My Profile**

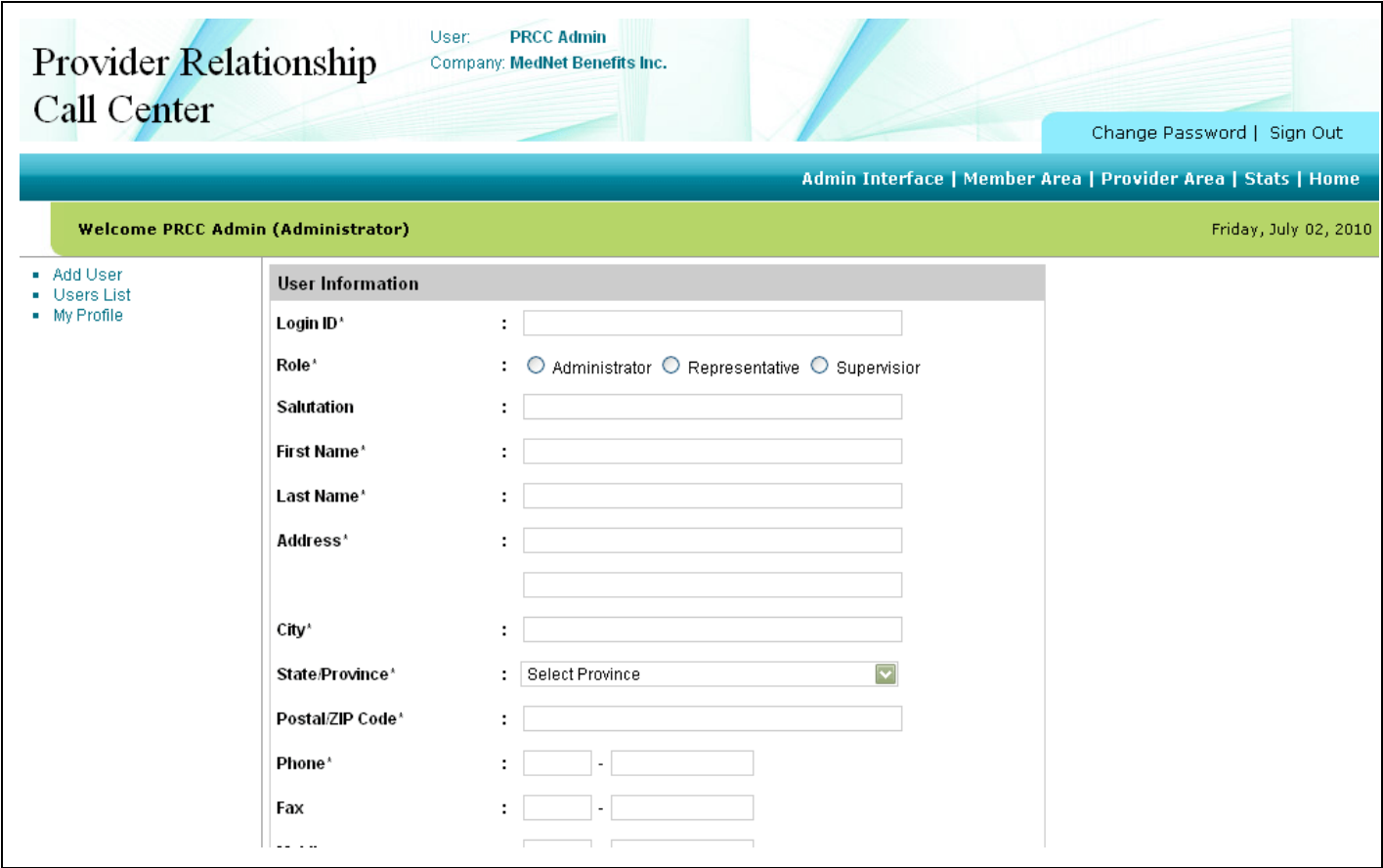


Figure 2: Add User

Member Area – In this section you can Search Member after that select a member to view his Program Details, Member Info, Membership History, Referral History, Tickets, Notes, and can also Add/Update notes.

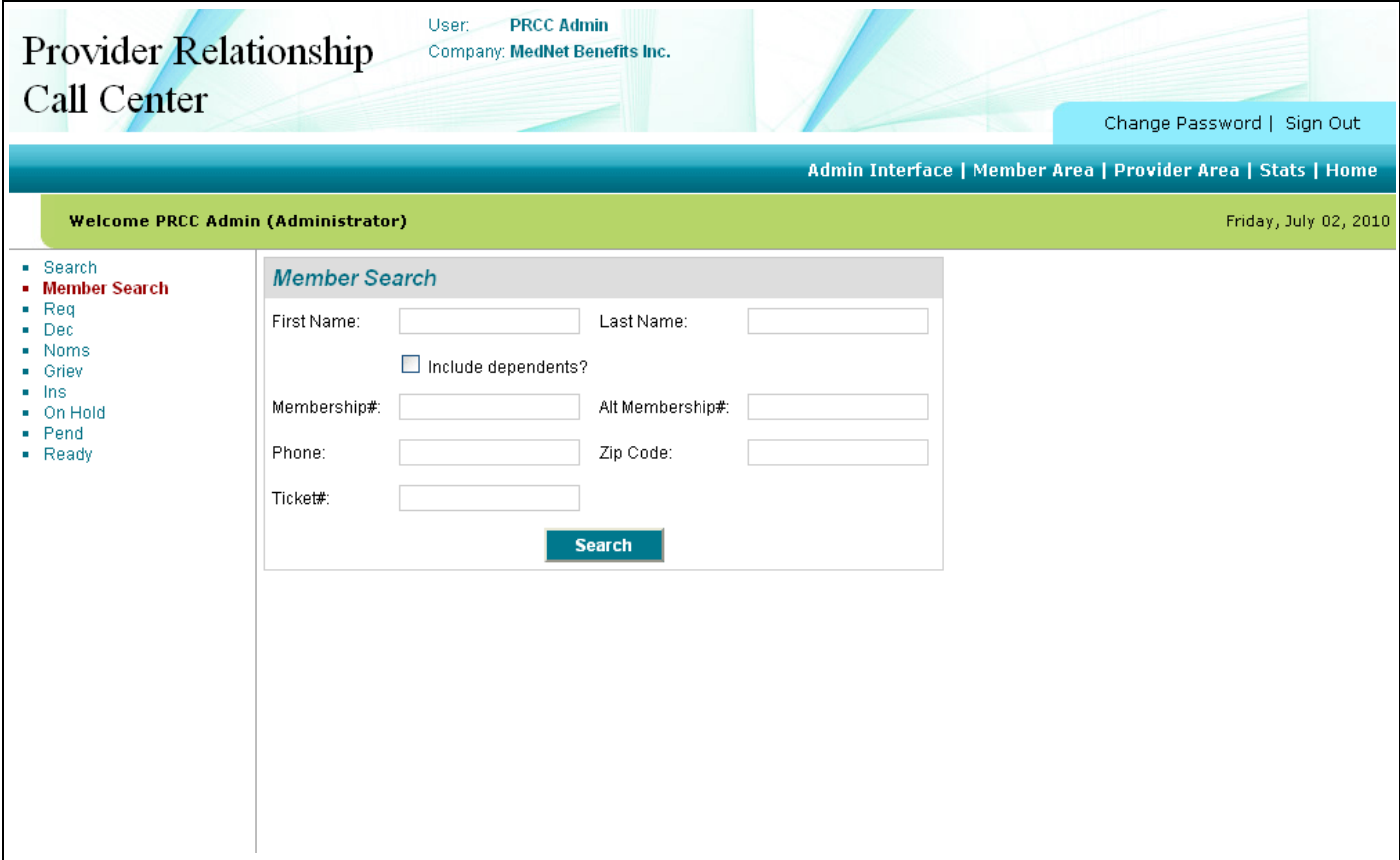


Figure 3: Member Search

Provider Area – In this section you can Add/Edit/View User, Add/Edit/View Provider, View Dental/Vision Pricing List and Search Dental/Vision Pricing List.

Provider Relationship Call Center

User: PRCC Admin
Company: MedNet Benefits Inc.

Change Password | Sign Out

Admin Interface | Member Area | **Provider Area** | Stats | Home

Welcome PRCC Admin (Administrator) Friday, July 02, 2010

- Add User
- Users List
- My Profile
- Add Provider
- Providers List
- Dental Pricing List
- Vision Pricing List
- Search Provider
- Search Dental Pricing
- Search Vision Pricing

Provider Relationship Call Center Users

Name	City	Email	Phone	Role	Modify
PRCC Representative	New York	prrep@yahoo.com	203-5987312	PRCC Representative	
PRCC Supervisor	New York	prsup@yahoo.com	416-1234567	PRCC Supervisor	

Figure 4: Provider Area

Stats – In this section you can View Ticket Summary

Provider Relationship Call Center

User: **PRCC Admin**
Company: **MedNet Benefits Inc.**

[Change Password](#) | [Sign Out](#)

[Admin Interface](#) | [Member Area](#) | [Provider Area](#) | **Stats** | [Home](#)

Welcome **PRCC Admin (Administrator)** Friday, July 02, 2010

[Tickets](#) | [Providers](#) | [Referrals](#) | [Total Tickets](#) | [Network](#)

Ticket Stats	
Measure	Value
On Hold Count	0
Open Declined Count	0
Open Grievance Count	3
Open Insurance Claim Count	0
Open Nomination Count	0
Open Request Count	0
Pending Cigna Count	0
Pending Declined Count	0
Pending Galaxy Count	0
Ready Callback Count	0
Urgent Count	0
Pending Count	0

Figure 5: Stats

Provider Search – We can search a Provider from here. We also have the ability to find the exact location of the Provider by looking at the Google Map.

The screenshot displays the 'Provider Relationship Call Center' interface. At the top left, the user is identified as 'PRCC Admin' from 'MedNet Benefits Inc.'. Navigation links include 'Change Password | Sign Out', 'Admin Interface | Member Area | Provider Area | Stats | Home', and a welcome message for 'PRCC Admin (Administrator)' dated 'Friday, July 02, 2010'. A sidebar on the left lists menu items such as 'Add User', 'Users List', 'My Profile', 'Add Provider', 'Providers List', 'Dental Pricing List', 'Vision Pricing List', 'Search Provider', 'Search Dental Pricing', and 'Search Vision Pricing'. The main content area features a 'Search Provider' form with the following fields: 'Provider ID #' and 'Fax Ref#' (text boxes); 'Name (Last, First)' (text box); 'Facility Name' (text box); 'Specialty' (dropdown menu set to 'All'); 'Language' (checkboxes for English, Spanish, Farsi, Korean); 'Gender' (dropdown menu set to 'All'); 'City' and 'State' (text boxes and dropdown menu set to 'All'); 'Zip Code (First 3 Digits)' (text box); 'Distance' (text box followed by 'Miles'); 'Phone no' (two text boxes); 'Tax ID' (text box); 'Status' (dropdown menu set to '-- All --'); a checked checkbox for 'Confirmable Only'; 'Flags' (checkboxes for Callback, Duplicate, Grievance, Wrong Info); and 'Referral Method' (dropdown menu set to '-- All --'). A 'Search' button is located at the bottom of the form.

Figure 6: Provider Search