SIEBEL *e*HEALTHCARE GUIDE

VERSION 7.5, REV. A

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Introduction

This guide is intended for healthcare organizations so that they can manage, automate, and coordinate customer processes. The procedures detailed in this guide are intended to help administrators set up and maintain Siebel eHealthcare.

This guide will be useful primarily to people whose titles or job descriptions match one of the following:

Call Center Representatives	Persons responsible for customer service.
Call Center Administrators	Persons responsible for setting up and maintaining a call center; duties include designing and managing Computer Telephony Integration (CTI), SmartScripts, and message broadcasts.
Database Administrators	Persons who administer the database system, including data loading; system monitoring, backup, and recovery; space allocation and sizing; and user account management.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department; duties include designing and managing campaigns, product marketing information, and product distribution lists.
Sales Representatives	End users of the Siebel application, who may connect to the network through a dedicated or mobile connection.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.
Trainers	Persons responsible for training end users of the Siebel eHealthcare application.

Siebel eHealthcare Guide provides detailed descriptions of Siebel eHealthcare. Siebel eHealthcare is targeted at healthcare organizations; therefore, industry-specific terminology is used throughout. Readers should have a general understanding of the healthcare industry and its terminology.

How This Guide Is Organized

This guide covers the features that are specific to Siebel eHealthcare. With the exception of the preliminary chapters, each chapter in this guide addresses a set of end-user and administrator procedures that are performed using a particular screen in Siebel eHealthcare. These chapters are workflow-oriented, guiding you through an example sequence of procedures to illustrate the use of Siebel eHealthcare.

Additional Resources

This guide should be used in combination with other books in the Application Administration section of the *Siebel Bookshelf*. However, the information in this guide supersedes information about Siebel products provided in other documentation.

In addition, it is strongly recommended that you read *Fundamentals* so that you can make optimal use of your Siebel application, especially if you are new to Siebel software. *Fundamentals* provides detailed coverage of the Siebel user interface and how to use it; working with data; locating information with the query and find features; sharing information with other users; and so on. The features presented in *Fundamentals* appear throughout the Siebel application suite; they are introduced through procedures you can learn and use in your own Siebel application.

Revision History

Siebel eHealthcare Guide

Version 7.5, Rev. A

Table 1. Changes Made in Version 7.5, Rev. A

Topic	Revision
"Glossary"	The book's Glossary section has been removed. The glossary definitions have been added to the main *Glossary* book.

Overview 1

Siebel eHealthcare includes various modules that you can mix and match according to your business needs. The next section, "Siebel eHealthcare Functionality" on page 16, describes Siebel eHealthcare functionality.

Siebel eHealthcare is built upon the Siebel eBusiness Architecture, including Siebel Sales, Siebel Service, and Siebel Call Center applications. Like many other Siebel eBusiness Applications, Siebel eHealthcare uses the Siebel Proposal Generator, Siebel Data Model, the Siebel Object Architecture, and the Siebel Application Server Architecture.

Siebel eHealthcare Functionality

Siebel eHealthcare offers a solution for relationship management in the healthcare market that includes the health insurance, employee benefits, and care delivery sectors. Built on the strengths of Siebel's industry-leading eBusiness applications, Siebel eHealthcare allows organizations to successfully manage relationships throughout the entire customer lifecycle, across all stakeholder touchpoints. This provides a platform for identifying new opportunities and expanding upon existing business relationships. Recognizing that success comes from relationships with the expanded community of stakeholders, Siebel eHealthcare's suite of applications focus on the expanded healthcare ecosystem: insurance subscribers and members as well as employer accounts, independent brokers, direct sales channels and providers (health systems, physicians, hospitals, networks, ancillary providers).

By using Siebel's eBusiness applications, Siebel eHealthcare provides solutions to address the industry's most pressing business issues.

The Siebel eHealthcare solution sets include:

- **End-to-End Sales**
  - Manage Opportunity and Account Tracking for prospecting, renewal, and lost business analysis
  - Team based selling (including external team members such as brokers)
  - Sales Manager views to facilitate team management
  - Embedded Sales strategy tools such as Miller-Heiman Strategic Selling
  - Capture of information for rating and underwriting such as census and health risk assessment
  - Automation capabilities to make sure that quotes and installed cases move through the organization
- **Agent/Broker/Consultant Solutions**
  - Profiling capabilities to track licenses, appointments, errors & omissions coverage, agency affiliation
  - Ability to assign an agent or broker to an opportunity or account

    - Management tools to assess the relative value of various selling partners
    - Delegated administration to allow agencies to administer their own user names and passwords

- **Group Account Relationship Management**
    - Ability to communicate new product information and tailored messages about the plan consistently across every interface
    - Streamline the open and ad hoc enrollment processes. Employees can self-enroll online or administrators can submit enrollment by using the group portal
    - Manage service issues with analytics and reports. Employers can have visibility into aggregate claims data, physician networks and other relevant plan information
    - Promote online self-service as an avenue for quick resolution of billing issues

- **Agent Tools**
    - Support demand from web, fax, phone and email from a single interface
    - Address common inquiries with a dashboard of eligibility information, claims history, service history, and log of customer interactions
    - Use assignment manager and workflow products to allow agents to follow best-practice procedures
    - Allow new agents to get up to speed through the use of scripting tools and a common solution library

- **Health Management**
    - Use the Events module to track available health classes and clinics and enroll members and patients
    - Create Activity plans and use workflow tools to outline the appropriate activities and resources required to proactively manage care
    - Develop campaigns for managing enrollment of at-risk populations in care management programs

    - Provide information to educate members on critical life events, disease specific services, and available health classes
    - Use analytics capabilities to track and monitor the success of classes and programs

- **Provider Relationship Management**
    - Consolidate critical information from back office systems related to individual physicians and other providers. This supports effective responses to inquiries and proactive management of the contracting relationship
    - Track key information on individual physicians such as panel size and status, location, office hours and hospital admitting privileges
    - Search for providers and facilities in a geographic radius using Geocode searching capabilities
    - Access provider information online using a secure website
    - Generate provider reports by specialty, product, or state
    - Offer provider portal to promote self-service for common inquiries

2 Getting Started

This chapter lists the applications administration tasks that are specific to Siebel eHealthcare. Use this chapter in combination with *Siebel Applications Administration Guide*.

Siebel Applications Administration Guide covers the setup tasks that are common to all Siebel eBusiness Applications, such as using license keys, defining employees, and defining your company’s structure. It also provides the information you will need to implement, configure, and monitor the Siebel sales, service, and marketing products and to perform data administration and document administration tasks.

This guide assumes that you have already installed or completed the upgrade of Siebel eHealthcare. If you have not, go to the Installation/Upgrade section of the *Siebel Bookshelf* and click the links to the guides that are relevant to your company’s implementation.

The Siebel database server installation script creates a Siebel administrator account that can be used to perform the tasks described in this guide. For more information about this process, see the *Installation Guide* for your operating system.

CAUTION: Do not perform system administration functions on your local database using the Mobile Web Client. Although there is nothing to prevent you from doing this, it can have serious results, such as data conflicts, an overly large local database, or a large number of additional transactions to route.

Renaming Siebel Account Objects

In general, Siebel applications refer to companies as accounts. In the Financial Services industry the term *account* has typically been synonymous with financial accounts so historically the word *company* has been used in many places in Siebel eHealthcare. By default, Siebel eHealthcare installs using the term *accounts*. Users can change this term and use another description, such as *Companies*, *Clients*, or *Customers*. Users wishing to change this default need to rename all Siebel Account objects prior to deployment. For more information, see the *Upgrade Guide* for your operating system.

NOTE: All of the chapters is this guide are written assuming you have renamed Siebel Account objects to *Companies*.

Configuring Lists of Values

In Siebel eHealthcare, the List of Values (LOV) should be modified in accordance with the terminology used by your financial institution. For example, the list of transaction types used in Siebel eHealthcare should match those used by your financial institution. For more information on configuring a LOV, see *Siebel Applications Administration Guide*.

NOTE: This may impact certain forms and lists, which rely on the preconfigured values for correct operation.

Configuring Summary Views

In Siebel eHealthcare, summary views have been restructured. In the past, multiple summary views existed, typically one summary view for a particular type of user. For example, there were preconfigured summary views specifically for salespeople and customer service agents. This has been replaced by common summary views whose appearance can be configured by individual end users.

Users can change the way a list appears in a summary view using the controls in the top right corner of each list. These controls, described in Table 2, allow users to manage what appears on the summary view.

Table 2. Summary View Controls

Button	Description
Hide	Temporarily hides a list or form from view.
Collapse	Collapses the list of records. If the list cannot be collapsed, the expand button appears instead of the collapse button.
Expand	Expands the list of records. If the list cannot be expanded, the collapse button appears instead of the expand button.

Any changes made to a summary view layout are only visible to the current user and remain in effect until that user changes them again or reverts to the default layout. If users hide a list, they must click Edit Layout to restore it. For more information, see "Editing a Summary View Layout" on page 22.

Editing a Summary View Layout

Using the Edit Layout view, users can restore hidden lists, collapse or expand all lists, move lists or forms up or down on the page, or revert to the default layout. Using the edit layout buttons, described in Table 3, users can change the way a summary view appears and apply those changes to future sessions.

Table 3. Edit Layout Buttons

Button	Description
Collapse	Collapses the list or form.
Expand	Expands the list or form.
Move up	Moves the list or form up on the home page.
Move down	Moves the list or form down on the home page.
Show	Displays the list or form on the home page.
Hide	Hides the list or form from view on the home page.

For more information on available summary views, see “Viewing a Contact Summary” on page 82, “Viewing a Company Summary” on page 63, and “Viewing a Household Summary” on page 94.

Adding Products and Product Lines

Administrators must set up products, such as health insurance products, in Siebel eHealthcare. After setting up a product, administrators can specify that it be included in a product line. They can also specify which product lines your company contracts agencies to sell or which ones the state licenses agencies to sell.

Setting up products is discussed in detail in *Product Administration Guide*. However, this guide also explains some steps for adding products in the appropriate chapters. In those chapters, values for specific fields are given to help administrators set up products correctly.

NOTE: Only those users with the required administrative responsibilities, such as Siebel administrators, can add products and information about product lines.

Opportunities 3

An *opportunity* is a potential revenue-producing event related to one or more companies or individuals. An opportunity often has a close date, a win probability, and a sales team. It is typically related to contacts, products, decision issues, activities, and competitors.

In Siebel eHealthcare, opportunities help an organization to nurture and manage the entire life cycle of a revenue-generating opportunity, from creation to closing. Relationship managers and sales representatives, who are responsible for managing and generating revenue, use opportunity information on a regular basis. Top management also uses the opportunity analysis tools in Siebel eHealthcare to analyze pipeline performance and help manage overall business performance through well-planned strategic-selling activities.

Using the procedures given in this chapter, you will be able to perform the administrator tasks of adding an opportunity from the Data Administration screen, managing the sales team assigned to an opportunity, specifying primary sales team members, and configuring persistent filters.

End users use the Opportunities screens to add an opportunity, create an opportunity from an application, and review opportunity details.

This chapter describes opportunity functionality that is unique to Siebel eHealthcare. For more information on basic opportunity functionality, see *Siebel Call Center User Guide* and *Siebel Sales User Guide*.

Business Scenario

This scenario features sample tasks performed by sales representatives and their managers in the healthcare industry. Your company may follow a different workflow according to its business requirements.

Sales Representative Creates New Opportunity

In this scenario, the sales representative has a new lead. The company is already entered in Siebel eHealthcare, and the individual the representative is calling on is already a contact for that company.

The customer calls to let the sales representative know that she is interested in creating a better health insurance plan for her employees. She would like the sales representative to present a proposal. If that goes well, she will want to discuss the terms of the deal.

First, the sales representative creates a new opportunity record. Then, he schedules the meeting, records the associated activities on his to-do list, and enters the terms of the proposal.

As the sales process continues, the sales representative continues to gather information about the company, its contacts, and the opportunity. At any time, he can review a summary of the profile, sales team, contacts, and activities associated with this opportunity.

Every morning, the sales representative's manager reviews the opportunities created the previous day. The manager evaluates the new opportunities and determines if she should add more members to each opportunity's sales team to make sure it is covered sufficiently. In a few critical cases, she decides to change the primary team member from the sales representative to herself.

In this scenario, end users are sales representatives who manage opportunities in the field. They use the Opportunities screen to:

- Create new opportunities for new and existing accounts
- Update existing opportunities
- View information about an opportunity

Opportunities Sample Tasks

Figure 1 illustrates sample tasks that administrators and end users typically perform when managing opportunities.

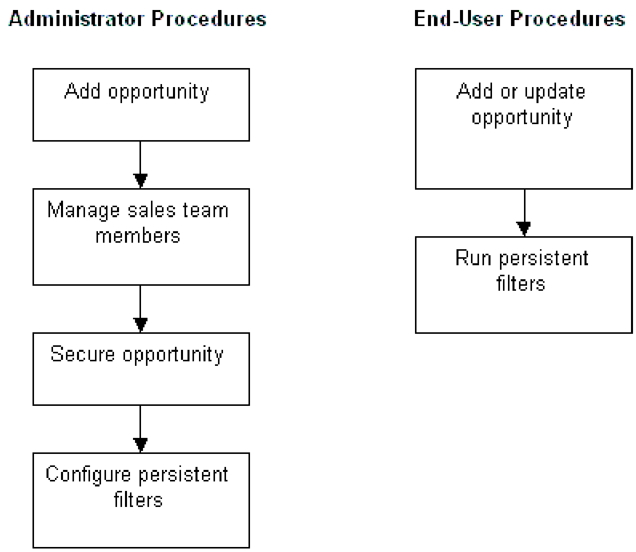

Figure 1. Opportunities Sample Tasks

Administrator Procedures

The following administrator procedures are described in this section:

- To add an opportunity from the Data Administration screen
- To add or delete members of the sales team for an opportunity on page 29
- To change the primary sales team member for an opportunity on page 29
- To secure an opportunity on page 30
- To add a field with a list of values to the Opportunities persistent filter on page 31
- To add a picklist field to the Opportunities persistent filter on page 32

Adding an Opportunity as an Administrator

Administrators can add, modify, and delete opportunities from the Data Administration screen, as well as the Opportunities screen.

To add an opportunity from the Data Administration screen

1. From the application-level menu, choose View > Site Map > Data Administration > Opportunities.
2. In the Opportunity form, add a record and complete the necessary fields.

NOTE: Deleting an opportunity completely removes the opportunity, as well as every activity related to the opportunity, from the system. If you are unsure whether the opportunity is still active (and therefore should not be deleted), you can remove yourself from the opportunity team instead of deleting the record.

Managing Opportunities

You may want to modify the members of the sales team for an opportunity or change the primary team member designation. When the existing primary is a direct report, a manager can change the primary team designate using the Opportunity Sales Team view. If you are logged in as an administrator, you can change the primary team designate for any opportunity in the Opportunity Administration view.

You can also secure an opportunity in order to restrict visibility in the All Opportunities view to just the members of the sales team. When the Secure field is checked, the opportunity is hidden from other users. A secured opportunity can only be viewed by members of the sales team from the All Opportunities or the My Opportunities view.

NOTE: The primary sales team member for an opportunity can also add and delete sales team members, and edit the Secure flag setting.

To add or delete members of the sales team for an opportunity

1. From the application-level menu, choose View > Site Map > Data Administration > Opportunities.
2. In the Opportunities list, select an opportunity.
3. In the Opportunity form, click the show more button to expand the form.
4. In the Sales Team field, click the select button.

   The Sales Team Members dialog box appears.
5. To add an employee to the sales team, click New and select the employee in the Add Employees dialog box.
6. To delete an employee from the sales team, select the employee in the Sales Team Members list and click Delete.

To change the primary sales team member for an opportunity

1. From the application-level menu, choose View > Site Map > Data Administration > Opportunities.

2. In the Opportunities list, select an opportunity.
3. In the Sales Team field, click the select button.

   The Sales Team Members dialog box appears.

4. Clear the current Primary sales team member.
5. Select a new Primary designate by clicking the check box in the Primary field.

To secure an opportunity

1. From the application-level menu, choose View > Site Map > Data Administration > Opportunities.
2. In the Opportunities list, select an opportunity that you want to secure (lock).
3. In the Opportunity form, click the Secure check box.

   Only the primary member of the sales team or the Siebel administrator can set the Secure check box. When an opportunity is marked Secure, only members of the sales team can view it in the All Opportunities view. Sales team members can also see a secure opportunity in their My Opportunities views.

Configuring Persistent Filters

Using Siebel Tools, administrators can modify the appearance of screens and views in Siebel eHealthcare. For more information see *Siebel Tools Reference*.

Siebel eHealthcare provides persistent filters for the Opportunities, Activities, Event Calendar, Sub-Events, and Sessions screens. By default, this filter does not appear on the Opportunities screen, but can be configured to appear on the Opportunities views. For more information on persistent filters for screens other than Opportunities, please see the relevant chapter.

The purpose of the Persistent Filter is to provide a mechanism that will allow quick filtering of records on selected fields without needing to enter query mode in a list. It is possible to modify the field selection of these filters using Siebel Tools. Administrators can add or remove fields from the existing persistent filters for the Opportunities, Activities, and Events screens.

NOTE: Creating new persistent filters is not recommended.

To add a field with a list of values to the Opportunities persistent filter

1. In Siebel Tools, locate the appropriate applet (for example, FINS Opportunity Filter Form Applet).
2. Lock the project.
3. In the Object Explorer, drill down under the Applet node and select Controls.
4. Add the desired field to the list, with the Name, Caption, Field, and Pick Applet fields populated with appropriate values.

   NOTE: You can use an existing control with an LOV in the filter applet, or the control on the base list or form, as a source of comparison.

   For example, Lead Quality was added with the following fields and values:

Field	Value
Name	Lead Quality
Caption	Lead Quality
Field	Quality
Pick Applet	Quality Pick Applet
HTML Display Mode	(null)
HTML Type	(null)

   The other fields were left at default values.

5. Save the record.
6. In the Object Explorer, drill down under the Applet Web Template node.
7. Select the Edit record only.

   NOTE: The Base mode is enabled for reference purposes only. Any modifications to the Base template will be ignored.

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8. Modify the Web template for the Edit record by right clicking and selecting Edit Web Layout.
9. Drag the new control to an appropriate placeholder.

   For example, drag the Lead Quality control from the Controls window onto an available placeholder in the template editor.

10. Save and close the new Web Layout.
11. Compile and test.

To add a picklist field to the Opportunities persistent filter

The following example shows how you could add the Address picklist to the filter.

1. In Siebel Tools, locate the appropriate applet (for example, FINS Opportunity Filter Form Applet).
2. Lock the project.
3. In the Object Explorer, drill down under the Applet node and select Controls.

4 Add the desired control to the list, with the Name, Caption, Field, Pick Applet, and Run Time fields populated with appropriate values.

NOTE: You can use an existing control with a picklist in the filter applet, or the control on the base list or form, as a source of comparison.

For example, Address was added with the following fields and values:

Field	Value
Name	Street Address
Caption	Address
Field	Street Address
Pick Applet	FINCORP Org Address
MVG Applet	True
Run Time	True

The other fields were left at default values.

5 Save the Record.

6 Drill down on the Applet's Business Component (for example, FINS Opportunity Filter).

7 Lock the Project for the business component.

8 Locate the field that you added to the applet. For example, locate Street Address.

9 Delete the field for this business component.

You will need to delete this field as often as the existing field is a duplicate of the base business component (for example, opportunity). The purpose of this exercise is to point the field to an empty column in a table for initial population when the filter is first rendered in the browser, and not to read and write to the business component. As a result, it is simpler to create the control from scratch and compare it to an existing picklist filter control.

10 Create the new record on the business component. The properties that need to be populated include:

- Name (for example, Street Address)
- Column (choose any column of the same data type—for example, DESC_TEXT)
- PickList (an appropriate picklist)

11 In the Object Explorer, drill down under the Applet Web Template node.

12 Select the Edit mode record only.

NOTE: The Base mode is active for reference purposes only. Any modifications to the Base template will be ignored.

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13 Modify the Web template for the Edit record by right-clicking and selecting Edit Web Layout.

14 Drag the new control to an appropriate placeholder. For example, drag the Street Address control from the Controls window onto an available placeholder in the template editor.

15 Return to the Applet and select Applet User Properties.

16 Add a record with the following fields: Name: MVG# (must be MVG and any number), and Field.

17 Save and close the new Web Layout.

18 Compile and test.

Limitations

With the exception of some specialized fields that appear preconfigured, there are currently no wildcard searches. It is recommended that only LOV's and picklists be used.

End-User Procedures

The following end-user procedures are described in this section:

- To add an opportunity
- To create an opportunity from an application on page 37
- To enter and run a persistent filter on page 38
- To save a persistent filter on page 39
- To delete a persistent filter on page 39

Adding an Opportunity

When end users identify a unique opportunity, they add a new opportunity record.

To add an opportunity

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, select My Opportunities.
3. In the More Info form, click the show more button, add a record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Closure Summary	Summary comments about the closing of an opportunity. Used by financial institutions when closing deals to track the circumstances and success or failure of closing.
Commitments	A read-only monetary value representing sum of commitments made in a commercial loan opportunity. This value is entered on the Opportunity Detail, Commercial Loans view. For more information, see "Adding Opportunity Details" on page 37.

Field	Comments
Deposits	A read-only monetary value representing the sum of deposits made in a commercial loan opportunity. This value is entered through the Opportunity Detail, Commercial Loans view. For more information, see "Adding Opportunity Details" on page 37.
Industry	Automatically populates with the industry of the company associated with the opportunity.
Lead Quality	Estimate of the quality of the deal.
Loans	A read-only monetary value representing the total amount of loans made in a commercial loan opportunity. This value is entered through the Opportunity Detail, Commercial Loans view. For more information, see "Adding Opportunity Details" on page 37.
Probability %	The estimate of the likelihood that the opportunity will result in business, expressed as a percentage: ■ 0% means it is doubtful that business will result ■ 100% means it is certain that business will result
Product Line	Select the product line associated with the opportunity.
Revenue	Enter the amount of money you expect this opportunity to generate. When combined with the probability you assign to the opportunity, the Expected Value field is calculated.
Sales Cycle	Select the current cycle of the opportunity. The total number of opportunities in a specific cycle stage and the length of time that a particular opportunity has been in that cycle are important data for evaluating that opportunity.
Secure	Restricts visibility of an opportunity in the All Opportunities view to the members of the sales team. Clicking on this check box secures the record. Only the primary member of the sales team or the Siebel administrator can set the Secure field. To make the opportunity visible to every end user in the All Opportunities view, leave this field unchecked.
Start Date	Start date for the opportunity.

Adding Opportunity Details

End users can add details specific to commercial lending, equity, fixed income, advisory, and lending syndicate opportunities in the Opportunities Details view tab.

To add specific opportunity details

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select an opportunity.
3. Click the Opportunity Detail view tab.
4. From the Show drop-down list, select one of the following:
   - Commercial Loan
   - Equity
   - Fixed Income
   - Advisory
   - Lending Syndicate
5. In the appropriate lists, add a record and complete the necessary fields.

Creating an Opportunity from an Application

End users can also create opportunities when they create a financial application.

To create an opportunity from an application

1. Navigate to the Applications screen.
2. From the Show drop-down list, select My Applications.
3. In the Applications list, add a record and complete the necessary fields.

   The new application is saved and an opportunity is created.

Using Persistent Filters

Persistent list filters provide end users with the ability to filter data in a list based on a query-by-example paradigm, but the criteria of the filters are visible and editable in the filter even after the filter has been run.

NOTE: Persistent filters are available in selected views in the Opportunities, Activities, Event Calendar, Sub-Events, and Sessions views.

To enter and run a persistent filter

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, select All Opportunities.
3. In the Opportunities Filter, create a filter query by filling in the desired fields.

   Some fields are described in the following table.

Field	Comments
Company	Select a company from the Pick Company dialog box.
Expected Value	Enter a range. For example, entering > = 2000000 would return opportunities with an expected value greater than or equal to $2,000,000. This field supports query operator use.
Industry	Select an industry from the Pick Industry dialog box.
Probability	Enter a percentage value or range of values. For example, entering > = 50, would return opportunities with a 50% or greater probability. This field supports query operator use.
Revenue	Enter a range. For example, entering > = 2000000 would return opportunities with revenue greater than or equal to $2,000,000. This field supports query operator use.
Sales Cycle	Select a Sales Cycle stage from the drop-down list.

NOTE: The persistent filter fields are cumulative; opportunities must meet every criteria defined in the Opportunities filter.

4 To run the filter query, click Go in the Opportunities Filter.

In the Opportunities list, only those records meeting the persistent filter criteria appear. End users can continue to filter the results by making changes to the values in the filter fields.

To save a persistent filter

1 Create and run a persistent filter. For more information, see "To enter and run a persistent filter" on page 38.

2 Type an appropriate name in the Save Filter As field and click Save or Save as Default.

Clicking Save as Default saves a filter query to run as a default every time you go to the associated Opportunities view.

The filter name appears in the Select Filter drop-down list.

To delete a persistent filter

1 Navigate to the Opportunities view which contains the saved persistent filter.

2 In the Opportunities Filter, select the saved persistent filter you wish to delete from the Select Filter drop-down list and click Delete.

The filter is deleted and no longer appears in the Select Filter list.

Companies 4

Within Siebel eHealthcare, the term *companies* refers to entities that are typically referred to as *accounts* in other Siebel applications. A company represents the relationship between your organization and companies or organizational entities (or structures) with which you do business. Use the Companies screen and its associated views to view company information and interactions.

CAUTION: This chapter assumes you have renamed Siebel Account objects to *Companies*. By default, Siebel eHealthcare installs using the term *Accounts*. For more information on renaming Siebel Account objects, see the *Upgrade Guide* for your operating system.

Using the procedures given in this chapter, you will be able to perform the administrator tasks of controlling company information, generating company hierarchies, managing competitor information, verifying coverage team members, and managing custom-defined relationship types.

End users use the Companies views to add new companies, create company assessments, associate service requests with a company, update a company coverage team, define relationships to other companies, contacts, and households, and view company summary information.

You can save time and reduce keystrokes by using a workflow to automate steps that are repeatedly performed by end users. For more information, see *Siebel Business Process Designer Administration Guide for Financial Services*.

About Company Hierarchies

A company hierarchy is a group of companies that are organized by parent-child relationships. Siebel Industry Applications support displaying these company relationships in a hierarchical tree.

The hierarchical tree is a visual representation of company hierarchy data that allows end users to view the relationships between companies. By viewing a company roll-up, users can see aggregated company information, including contacts, coverage teams, activities, and opportunities.

When end users have access to a company, they can review the hierarchical structure for that company, its child divisions, and the contacts that work there. Company hierarchies are displayed in five subviews of the Companies screen—Relationship Hierarchy view, Activity Roll-up, Contact Roll-up, Opportunity Roll-up, and Coverage Team Roll-up.

Depending on your configuration, a company that does not have a parent-child relationship with another company may not appear in the roll-up views.

For more information on company hierarchies, see "Generating Company Hierarchies for Data Aggregation" on page 51 and "Viewing Company Hierarchies in Roll-up Views" on page 57.

Business Scenarios

These scenarios feature sample tasks performed by a sales representative in the insurance and healthcare industries. Your company may follow a different workflow according to its business requirements.

In this scenario, end users are the sales representatives who manage company information. They enter information to:

- Add new companies to the database and create company assessments
- Associate applications and service requests with a company
- Manage company coverage teams
- View company summary information
- View relationships in a graphical manner
- Add census information

Sales Representative Tracks Company Information

A sales representative uses the Companies screen to capture and manage profile information about her business customer, such as contacts, organizational structure, management, and financial information. In addition to viewing market statistics and D&B reports. Using Siebel eHealthcare, she can capture and track information about a company's:

- Relationship with her organization, such as the coverage team, contract terms, sales and service information
- Preferred delivery channels, at both summary and detailed levels

She can also view details of competitors and create and access marketing and sales presentations.

The sales representative can create a new company record or view and modify information about existing companies. For example, if the sales representative is preparing for a sales call, she can use the Companies screen to answer the following questions:

- What business is this company in?
- Who are the executives I should be calling on?
- What is this company's financial profile?
- What financial accounts and products does the company already own?
- What types of service issues has the company had?

Sales Representative Collects Census Data

A licensed sales representative for an insurance company is on the phone with a prospective customer who requests a quote for group insurance. In this case, the prospective customer is an insurance agent who calls on behalf of a large company that wants to offer insurance at group rates to its employees.

After the sales representative gathers information from the agent, he adds a policy record in the Group Policies screen. Then, he goes to the Census view to collect segmented and detailed census data in preparation for generating a policy proposal.

As he works with the agent, he navigates to a variety of views. He accesses the Plan Design view to specify the group plan design and the Proposals view to generate proposals. For more information on group policies, see Chapter 10, "Group Policies."

Companies Sample Tasks

Figure 2 illustrates sample tasks that administrators and end users typically perform when managing companies.

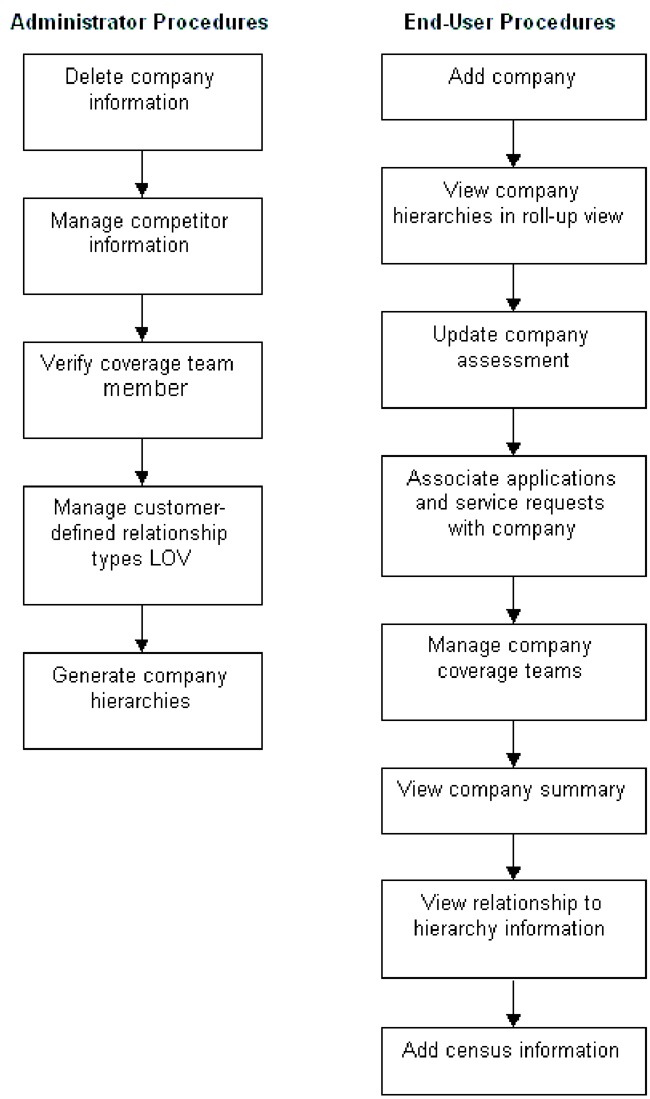

Figure 2. Companies Sample Tasks

Administrator Procedures

The following administrator procedures are described in this section:

- To make a company unavailable to all other users on page 46
- To indicate that a company is a competitor on page 47
- To search for a company without any coverage team members on page 49
- To add or delete members of the coverage team for a company on page 49
- To change the primary coverage team member for a company on page 49
- To add a custom-defined relationship type on page 50
- To generate a default company hierarchy on page 52
- To create a dynamic company hierarchy of selected companies on page 53

Deleting Company Information

Deleting a company completely removes the company, as well as all activities related to the company, from the system. Only delete a company record if you are certain that the company is no longer active. If end users are unsure whether or not a company is still active (and therefore should not be deleted), they have the option of removing themselves from the company team instead of deleting the record.

As the Siebel administrator, you can make a company unavailable to all other users. First, you can assign yourself as the primary team member. Second, you remove all other employees from the company's team.

To make a company unavailable to all other users

1. From the application-level menu, choose View > Site Map > Data Administration > Companies.
2. In the Company list, select a company.
3. In the Company form, click the select button in the Coverage Team field.

   The Coverage Team dialog box appears.

4. In the Coverage Team dialog box, locate the administrator and click in the Primary field.

   A check mark appears in the Primary field.

5. In the Coverage Team dialog box, delete all other coverage team members and click OK.

   Only those users with access to the All Companies and All Companies Across Organizations views will be able to see this company.

Managing Competitor Information

Effective sales and marketing requires that your employees have up-to-date and consistent information about the competition and their products. This section describes how to administer information about competitors and competitive products within the Companies screen.

To indicate that a company is a competitor

1. From the application-level menu, choose View > Site Map > Data Administration > Companies.
2. In the Company list, add or select a company.
3. In the Company form, click the show more button.
4. Select the Competitor check box to add the company to the Competitor's list.

   The company appears in the Competitor's list. The Competitor's list is available in the Competitors screen and related screens, such as Opportunities.

NOTE: Non-administrators can specify that a company is a competitor by selecting Competitor from the Type drop-down list. However, selecting Competitor from the Type drop-down list does not add the company to the Competitor's list as seen on the Competitor's screen or in the Pick Competitors dialog box, which is accessible on related screens, such as Opportunities.

When a company has been indicated as a competitor, you may want to add document files of comparative and competitive literature. For more information, see the chapter on literature administration in *Siebel Applications Administration Guide*.

Competitor Information

You cannot delete records that have been added to the Competitors list, since deleting them would also remove them from related screens, like Opportunities. For example, a company may have been a competitor for an opportunity last month. Even if the company is no longer a competitor, the competitor record should remain as part of the history of the opportunity.

If you no longer want a record to appear in the Competitor's list, uncheck the Competitor check box. This removes the record from the Competitors screen without affecting other screens.

Verifying Coverage Team Members

If you are logged on as a Siebel administrator, you can search for companies that do not have any coverage team members.

Managers can add or delete the members of a company's coverage team if they are the existing primary team member, or the primary team member is one of their direct reports. If you are logged in as an administrator, you can change the primary team designate for any company in the Company Administration view (From the application-level menu, choose View > Site Map > Data Administration > Companies).

The procedures that follow involve making selections in the Coverage Team field. If the Coverage Team field does not appear in your installation, you may need to reveal it using the Columns Displayed dialog box.

NOTE: Usually, Assignment Manager resolves problems with coverage teams and owner assignment automatically. For more information on Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

To search for a company without any coverage team members

1. From the application-level menu, choose View > Site Map > Data Administration > Companies.
2. In the Companies list, define a New Query where the Coverage Team field equals IS NULL.

   NOTE: If the Coverage Team field does not appear, you may need to reveal it using the Columns Displayed dialog box.

   ---

3. Execute the query.

   The query returns a list of all companies which do not have any coverage team members.

To add or delete members of the coverage team for a company

1. From the application-level menu, choose View > Site Map > Data Administration > Companies.
2. In the Companies list, select a company.
3. In the Company form, click the select button in the Coverage Team field.

   The Coverage Team dialog box appears.

4. To add or delete coverage team members:
   - To add a member to the coverage team, click New, select an employee in the Coverage Team dialog box, and click OK.
   - To delete an employee from the team, select the employee in the list and click Delete.

To change the primary coverage team member for a company

1. From the application-level menu, choose View > Site Map > Data Administration > Companies.
2. In the Companies list, select a company.

3 In the Company form, click the select button in the Coverage Team field.

The Coverage Team dialog box appears.

4 Select the Primary field for the new primary coverage team member and click OK.

Managing the Custom-Defined Relationship Types LOV

If you are logged in as the Siebel administrator, you can create and maintain a list of predefined custom-defined relationship types. A default list of values is provided with the application. These relationship types appear in the drop-down LOV for the Type field found on the Relationship Hierarchy views, in the Party Relationship applet.

To add a custom-defined relationship type

1 From the application-level menu, choose View > Site Map > Application Administration > List of Values.

2 In the List of Values list, create a New Query where Type equals PARTY_RELATIONSHIP_TYPE.

At least six records will be returned, showing the existing list of values for custom-defined relationship type.

3 In the List of Values list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Active	Determines whether the value is displayed to the end user in the Relationship drop-down list.
Display Value	Value as displayed in the Relationship drop-down list.
Language Independent Code	Code used internally by the Siebel application.
Language Name	Language used for the list of values Display Value field.

Field	Comments
Order	Numerical order in which a value is displayed within the Relationship drop-down list.
Parent LIC	Language-independent code of a parent list of values. It is used in hierarchical list of values.
Translate	When checked, indicates that the list of values is part of a multilingual list of values (MLOV).
Type	The type of list of values. For this procedure, select PARTY_RELATIONSHIP_TYPE.

NOTE: You cannot delete LOV table entries. Use the Active check box to deactivate an LOV entry and thereby remove it from the Relationship drop-down list.

Generating Company Hierarchies for Data Aggregation

Data aggregation is available by using the Roll-up views provided the administrator defines one or more hierarchies. The application administrator typically defines a default hierarchy by associating accounts with one another using the parent field on a company form, or the subaccount view for child accounts. Administrators can define Company hierarchies to display aggregated data—the activities, opportunities, contacts, and coverage teams—across organizational structures. For example, the top node of the hierarchy contains activities for the organization, the subsidiaries below the organization, the departments at the subsidiaries, and contacts working at any level of the tree. As the end users move up and down the tree, they see more or less data rolled up to the selected level.

The application administrator can define two types of hierarchies for data aggregation—a default hierarchy for all end users and specific hierarchies that are used only by certain end users.

Default Company Hierarchies

The application administrator sets up a default company hierarchy once, during the initial application setup. The default hierarchy is available to all end users who are not tied to a specific hierarchy and who have been granted view access to the companies represented in the hierarchy. It is the administrator's responsibility to give end users access to Company views. For more information, see *Siebel Applications Administration Guide*.

When new companies are added, they are automatically added to the default hierarchy tree and the contacts, coverage teams, activities, and opportunities that are associated with the company are automatically displayed in the roll-up views.

In the preconfigured application, using the Generate Hierarchy button adds only parent account and child companies to the hierarchy. Any company that does not have a child or parent is not displayed in the roll-up views. In Siebel Tools, you can change the DynHierarchy LoadAllAccounts user property to alter this behavior.

The DynHierarchy LoadAllAccounts user property on the Dynamic Hierarchy Direct Relationship business component can be set to N or Y. When it is set to N, only parent and children appear in the a generated hierarchy. When DynHierarchy LoadAllAccounts user property is set to Y, all companies are added to the generated hierarchy. For more information on setting user properties, see *Siebel Tools Reference*.

To generate a default company hierarchy

1. In the application-level menu, choose View > Site Map > Application Administration > Account Hierarchies.

2 In the Account Hierarchies list, click Generate Hierarchy.

The parent-child account relationships that have been defined in your application are registered for participation in the roll-up views. This process may take some time, depending on the quantity of account records that are in your existing environment.

When the company hierarchy has been generated, a new record appears in the Company Hierarchies list. The Hierarchy Name field of the record contains the user Id of the administrator who generated the hierarchy and the time it was generated. If it is the only hierarchy record, the Default field is automatically checked. The companies that have been added for participation in the roll-up views appear in the Company Relationships list.

NOTE: If no accounts are visible in the Company Relationships list, click the query button, step off the query, and click Go to refresh the view.

---

3 Optional. Rename the company hierarchy and, if necessary, check the Default field.

NOTE: If end users are using the application when you generate a hierarchy, they must log off and log on again to see the default hierarchy in the roll-up views.

Dynamic Company Hierarchies

In some cases, users work with particular companies within a large corporation, but not with others. In these instances, some end users do not need to or should not see aggregated data across the entire corporation. An administrator can define a custom hierarchical structure across which data can be aggregated. This defined structure, called a *dynamic hierarchy,* can be as simple or complex as needed and offers users the ability to aggregate data across the companies they are interested in seeing.

To create a dynamic company hierarchy of selected companies

1 In the application-level menu, choose View > Site Map > Application Administration > Company Hierarchies.

2 Create a new company hierarchy record.

3. Click the Add button in the Company Relationships list, select companies in the Add Company dialog box, and click OK.

   All the accounts in the Company Relationship list belong to the new account hierarchy.

4. To define parent and child relationships, select an company in the Company Relationship list that has no parent, click the select button in the Parent Company field, and select a parent company in the Pick Parent Company dialog box.

5. Repeat Step 4 for all companies that have no parents.

6. Associate the dynamic hierarchy with an organization.

End users can only see the hierarchy with which their current position's primary organization is tied. It is the administrator's responsibility to associate end users with positions, positions with organizations, and organizations with hierarchies. For more information, see *Siebel Applications Administration Guide*

End-User Procedures

The following end-user procedures are described in this section:

- Adding a Company
  - To add a company on page 56
- Viewing Company Hierarchies in Roll-up Views
  - To view aggregated activities for a company on page 57
  - To view the aggregated coverage team for a company on page 58
  - To view aggregated opportunities for a company on page 58
  - To view an aggregated list of contacts for a company on page 59
- Creating Assessments for a Company
  - To perform a company assessment on page 59
  - To view the results of a company value assessment on page 60
- Associating Applications with a Company
  - To associate an application with a company on page 61
- Associating a Service Request with a Company
  - To add a service request associated with a company on page 62
- Managing a Company Coverage Team
  - To add a member to a coverage team on page 63
- Viewing a Company Summary
  - To view company summary information on page 63
- Viewing a Company Relationship Hierarchy
  - To establish a natural parent-subsidiary relationship between two companies on page 65
  - To create a custom-defined relationship on page 65

- Adding Census Information
    - To add census information in the Companies screen on page 67

Adding a Company

When end users identify a possible lead, the lead can be added as a company. Users can then begin to add and track information about the company.

To add a company

1. Navigate to the Companies screen.
2. From the Show drop-down list, select My Companies.
3. In the Companies form, click the show more button, add a record, and complete the necessary fields.

    United States law requires that financial institutions disclose their privacy policies regarding the sharing of non-public personal information with third parties and fair credit reporting that impacts the sharing of non-public personal information with affiliates. End users can specify a privacy level by making a selection from the Privacy Option field.

4. To specify a privacy level, scroll down to the Privacy Option field and select one of the following:
    - **Opt-In.** Sharing of non-public personal information is allowed without restrictions.
    - **Opt-Out - Affiliates.** Sharing of non-public personal information with affiliates is not allowed.
    - **Opt-Out - Third Party.** Sharing of non-public personal information with third parties is not allowed.

- **Opt-Out - All Parties.** Sharing of non-public personal information with any affiliate or third party is not allowed.

NOTE: If you have administrator privileges, you can also add companies from the application-level menu, by choosing View > Site Map > Data Administration > Companies.

Viewing Company Hierarchies in Roll-up Views

End users can review the company and its parent organization, subsidiaries, contacts, opportunities and relationships to other entities in the graphical relationship hierarchy tree control available in the roll-up views. By drilling down on hypertext links on the hierarchy tree, end users can navigate to related views.

NOTE: If the company has not been added to a hierarchy tied to the user's position's organization (either default hierarchy or dynamic hierarchy), the hierarchy tree is not visible to the end user. Instead they the following message: "The selected record is not included as part of your defined hierarchy. If you feel this is in error, please contact your system administrator." The administrator is responsible for associating positions with organizations and an organization with a hierarchy.

The Activities-Roll-up view shows all of the activities associated with the selected company and its children. End users can apply filters to the list to find specific activity records and save the filtered list.

To view aggregated activities for a company

1. Navigate to the Companies screen > My Companies.
2. Select a company and click the Activities-Roll-up view tab.

   The associated hierarchy appears on the right side of the screen. All activities associated with the company and all of its children appear in the Activities-Roll-up list.

   In the Activities-Roll-up List, you can:

- Drill down on an activity type to navigate to the Activities > Attachments view.
- Drill down on a company name to navigate to the Companies > Contacts view.

NOTE: If you create an activity in the Activities screen and do not set the Company field, the activity will not appear in the Activities-Roll-up list.

To view the aggregated coverage team for a company

1. Navigate to the Companies screen > My Companies.
2. Select a company and click the Coverage Team-Roll-up view tab.

   The associated hierarchy appears on the right side of the screen. All coverage team members associated with the company and all of its subsidiaries appear in the Coverage Team-Roll-up list.

   In the Coverage Team-Roll-up list, you can:

   - Drill down on a last name to navigate to the Employees screen.
   - Drill down on an email address to open a blank email message addressed to the team member who has that address.

To view aggregated opportunities for a company

1. Navigate to the Companies screen > My Companies.
2. Select a company and click the Opportunities-Roll-up view tab.

   The associated hierarchy appears on the right side of the screen. All opportunities associated with the company and all of its children appear in the Opportunities-Roll-up list.

   In the Opportunities-Roll-up list, you can:

   - Drill down on an opportunity name to navigate to the Opportunities screen.
   - Drill down on an company name to navigate to the Companies >Contacts view.

To view an aggregated list of contacts for a company

1. Navigate to the Companies screen > My Companies.
2. Select a company and click the Contact-Roll-up view tab.

   The associated hierarchy appears on the right side of the screen. All contacts associated with the company and all of its children appear in the Contacts-Roll-up list.

   In the Contacts-Roll-up list, you can:

   - Drill down on a last name to navigate to the Contacts screen.
   - Drill down on an company name to navigate to the Companies > Contacts view.
   - Drill down on an email address to open a blank email message addressed to the contact who has that address.

Creating Assessments for a Company

An *assessment* is a set of attributes used to assess the business potential or credit worthiness of a company. Company assessments can be used to compare companies to each other or against a model, or to learn about companies and sales situations. End users complete the company assessment by selecting the appropriate values for the different attributes.

To perform a company assessment

1. Navigate to the Companies screen.
2. From the Show drop-down list, select My Companies.
3. In the Companies list, select the company for which the assessment is being performed.
4. Click the Assessments view tab.
5. In the Assessments list, add a record.
6. In the Template Name field, click the select button.

   The Select Assessment Template dialog box appears.

7 In the dialog box, select the appropriate template and then click OK.

   Attribute records are automatically generated in the Assessment Attributes list.

8 In the Assessment Attributes list, make a selection in the Value field for each attribute and then click OK.

For more information viewing assessments, see "Viewing the Results of a Company Value Assessment" on page 60.

NOTE: Administrators must create the assessment templates. See *Siebel Applications Administration Guide* for more information on how to create assessment templates.

Viewing the Results of a Company Value Assessment

A company value assessment evaluates a company based on criteria defined by an end user's organization. The results of a company value assessment appear in the form of a Customer Value icon. This icon appears in the Company Summary and gives users an instant summary of the value of the company to the financial institution. Each star represents a quartile value. For example, one star means 1% to 25% and two stars mean 25% to 50%. This four-star system allows the user to determine the value of a company without having to perform complex research and analysis.

To view the results of a company value assessment

1 Navigate to the Companies screen.

2 From the Show drop-down list, select My Companies.

3 In the Companies list, select a company for which you want to view the results of a company value assessment.

4 Click the Summary view tab.

   The Company Summary view appears. Each star in the Customer Value icon represents a quartile value.

Associating Applications with a Company

Applications are used for companies that want to apply for offered services or products. For example, a small business wants to apply for a business checking account. The end user handling the inquiry finds the company in the All Companies view, navigates to the Applications view, and creates an application record for this business checking account application.

To associate an application with a company

1 Navigate to the Companies screen.

2 From the Show drop-down list, select All Companies.

3 In the Companies list, select the company to associate with an application.

4 Click the Applications view tab.

The applications associated with that company appear.

5 In the Applications list, add a record and complete the necessary fields.

NOTE: To enter more detailed application information, drill down on the Application Name hyperlink.

Associating a Service Request with a Company

A service request is a request from a company for information or assistance with a problem related to purchased products or services. When a customer calls about an existing service request, end users can find the service request and give status information to the caller in several ways. They can:

- Review the service request information
- Create an activity to record the customer's call
- Update the service request with additional information from the customer
- Resolve the service request
- Assign the service request

- Transfer the caller to another service representative

If a call requires that an end user create a new service request, she can create one. Siebel eHealthcare automatically assigns a unique service request (SR) number to track the new service request throughout the system.

To add a service request associated with a company

1. Navigate to the Companies screen.
2. From the Show drop-down list, select All Companies.
3. In the Companies list, select a company.
4. Click the Service Requests view tab.

   The service requests associated with that company appear.
5. In the Service Requests list, add a record and complete the necessary fields.

   The application automatically assigns a service request number (SR#).

Managing a Company Coverage Team

A coverage team is the group of employees that are assigned to manage the relationship with a given company. The coverage team for a company is defined as all users who have access to the company in the My Companies view.

NOTE: Similar coverage team functionality is also available for contacts. You can use the Contact Coverage Team view (Contacts > Coverage Team) to manage the contact coverage team.

End users can use the company coverage team functionality available in Siebel eHealthcare to:

- Record and display employees covering a company within a single company record
- Specify and review the nature of the employee's relationship with each covered company, defined as the Coverage Role and Attributes list

To add a member to a coverage team

1. Navigate to the Companies screen.
2. From the Show drop-down list, select My Companies.
3. In the Companies list, select a company.
4. Click the Coverage Team view tab.
5. In the Coverage Team list, add a record.
6. In the Add Employees dialog box, select an employee and click OK.
7. If known, select the employee's coverage role using the drop-down list in the Coverage Role field.

   NOTE: The Siebel administrator maintains the Coverage Role LOV in the List of Values screen under the Type field value type FINS_COVERAGE_ROLE_TYPE. To access the List of Values screen select View > Site Map > Application Administration > List of Values.

   ---

8. If desired, use the Categories and Securities list to select values defining the coverage relationship between the employee and the company; you can select one or more attributes.

   The application adds the employee to the coverage team with a defined relationship. The company will appear in the employee's My Companies view.

Viewing a Company Summary

The Company Summary view provides a comprehensive view of a company in an editable format. This view displays basic company information, financial accounts, call reports, logged alerts, and contacts associated with a company.

The Customer Value icon in the Company form indicates the company's value to the organization. For more information, see "Creating Assessments for a Company" on page 59.

To view company summary information

1. Navigate to the Companies screen.

2 From the Show drop-down list, select All Companies.

3 In the Companies list, select a company.

4 Click the Summary view tab.

For more information on editing summary view information, see "Configuring Summary Views" on page 21.

Viewing a Company Relationship Hierarchy

End users use the Company Relationship Hierarchy to identify and capture key relationships for a company. This view features a graphical tree that provides a visual representation of a company's relationships. The tree shows the natural hierarchy of a company's parent-child relationships to entities such as companies, subsidiaries, divisions, contacts, and coverage relationships with employees as well as custom-defined relationships.

Custom-defined relationships are ad-hoc associations between the company and any contact, organization, household, or employee. End users can record custom-defined relationships between any two entities in the adjacent Party Relationships list.

NOTE: The Relationship Hierarchy view is also available on the Contacts, Employee (read only) and Households screens. For more information, see "Viewing a Contact Relationship Hierarchy" on page 83 and "Viewing a Household Relationship Hierarchy" on page 95.

To establish a natural parent-subsidiary relationship between two companies

1. Navigate to the Companies screen.
2. From the Show drop-down list, select My Companies.
3. In the Companies list, select the company to be established as the subsidiary.
4. In the More Info form, click the show more button.
5. In the Parent field, click the select button.

   The Pick Company dialog box appears.
6. In the Pick Company dialog box, select the parent company and click OK.

   The name of the selected company appears in the Parent Organization field.
7. Repeat Step 3 through Step 6 to set up companies, subsidiaries, branches, and departments as needed for your deployment.
8. Click the Relationship Hierarchy view tab.

   The new parent-subsidiary relationship is shown in the Relationship Hierarchy explorer in the lower-left corner of the screen.

NOTE: An alternative approach would be to select the parent companies and select the Subaccount view to add children.

To create a custom-defined relationship

1. Navigate to the Companies screen.
2. From the Show drop-down list, select My Companies.
3. In the Companies list, select the company for which you want to create a custom-defined relationship.
4. Click the Relationship Hierarchy view tab.

5 In the Party Relationship list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Relationship	Categorizes the relationship between the company and another entity. Field has an LOV for custom-defined Relationship values. Predefined values include Reports To, Spouse, Child, Lawyer, Board Member, Primary Contact (Backup), Admin Assistant, Competitor, Referral, Service Provider, Investor, Wealth Management Rep, Related Subsidiary, Bank Attorney, Trustee Attorney, and Debtor Attorney. This LOV can be modified by the Siebel administrator. For more information, see "Managing the Custom-Defined Relationship Types LOV" on page 50.
Start Date End Date	If the custom-defined relationship falls between the Start and End Dates, it appears in the tree. If it falls outside the range, it does not appear to the user. The user can enter a start or end date, or both.
Type	Use this field to determine the type of entity with which you wish to establish a relationship. Defaults to Contact. Other values include Household, Organization, and Employee.
Value	The value in this field is based on the Type field. For example, if Type equals Contact, then clicking the select button in Value field displays the Select Contact dialog box.

The newly defined relationship appears in the Relationship Hierarchy explorer.

Adding Census Information

In addition to adding census information in the Group Policies screen, end users also add census information on the Companies screen for companies that request a quote or proposal for a group insurance policy.

To add census information, end users must:

- Add a policy in the Group Policies screen. For more information, see "Adding Policy Records" on page 139.

- Add census information using the instructions below, or by using the Group Policies, Census view tab. For more information, see "Adding Census Information in the Group Policies Screen" on page 140.
- Navigate to the Group Policies screen and associate the census with the policy. For more information, see "Associating a Census with a Policy" on page 141.

To add census information in the Companies screen

1. From the application-level menu, choose View > Site Map > Companies > My Companies.
2. In the Companies list, select a company.
3. Click the Census view tab.
4. In the Census list, from the Show drop-down list, select Segmented Census or Detailed Census.
   - **Segmented Census.** Allows you to add information for groups of employees.
   - **Detailed Census.** Allows you to add information for individual employees.

   NOTE: After adding one type of census information, you can select the other type from the Show drop-down list and add information for it.

   ---

5. In the Census list, click New.
6. In the new record, complete the fields.
7. Perform the appropriate task from the following list:
   - If you selected Segmented Census, scroll down to the Employee Count list.
     - In the Employee Count list, click New.
     - Complete the fields.
   - If you selected Detailed Census, scroll down to the Employee List list.
     - In the Employee List list, click New.
     - Complete the fields.

Contacts 5

Contacts are entities or individuals with whom the company does business or with whom it expects to do business in the future. Contacts can be employees of other companies, independent consultants, vendors, or personal acquaintances. Contacts can belong to only one company, but they can be part of many opportunities, including opportunities that do not involve their companies. Within Siebel eHealthcare, contacts are presented in a single view of the customer and your relationship with the customer.

CAUTION: This chapter assumes you have renamed Siebel Account objects to *Companies*. By default, Siebel eHealthcare installs using the term *Accounts*. For more information on renaming Siebel Account objects, see the *Upgrade Guide* for your operating system.

Using the procedures given in this chapter end users can enter and track information about contacts, including products bought, details of signed agreements or contracts, and products previously recommended to the customer. Users can also document marketing campaigns and details of each customer's response. Users can maintain a history of service requests, insurance claims, and product applications that the customer has made in the past. They can analyze a customer's financial health as well as a customer's needs.

The Contacts screen provides an alternative view of data that is available in other screens. Many tasks that can be performed in the Contacts views can also be performed in other screens. For example, users can create activities for a contact either in the Contact Activities view, or they can go to the My Activities view to enter a new activity, and then associate it with the contact.

For more information on basic contact functionality and administration, see *Siebel Call Center User Guide*, *Siebel Sales User Guide*, and *Siebel Applications Administration Guide*.

You can save time and reduce keystrokes by using a workflow to automate steps that are repeatedly performed by end users. For more information, see *Siebel Business Process Designer Administration Guide for Financial Services*.

Business Scenario

These scenarios feature sample tasks performed by a sales representative in the healthcare industry. Your company may follow a different workflow according to its business requirements.

Sales Representative Adds a New Contact

At conference a new account representative meets a potential customer. The potential customer gives the new account representative his business card and informs her that he had recently moved to the area and works for a medium sized software company.

The new account representative returns to her office and enters her new acquaintance into the Siebel eHealthcare as a new contact. She can also enter his company information and associate the company with the contact. In the Relationship Hierarchy view, she can enter the relationships for this contact, including all companies he is associated with, the contact's business partners, lawyer, his family members, and other influential relationships. As the creator of this new contact record, she is automatically added to the coverage team as the primary representative for the customer. If necessary, she can also add the small business manager and other product experts to the coverage team so they can see this new contact in their My Contacts view.

As the customer is looking for personal and business services, the account representative can create separate opportunity records in Siebel eHealthcare associated with the contact. In the opportunity records, she records the products and services the customer is interested in as well as other follow-up activities to serve the customer's needs.

In the scenario, end users are the new account representatives who manage company information in the field. They enter information to:

- Add a new contact and associate him/her with companies
- Use the Relationship view to enter all the contact's influential relationships
- Add other account representatives to the coverage team
- Create new opportunities associated with the contact

- Create follow-up activities and assign them to the right representatives to close the potential opportunities

Contacts Sample Tasks

This section details sample tasks often performed by end-users when working with contacts. Your company may follow a different workflow according to its business requirements.

End-User Procedures

The following list shows tasks end users typically perform when working with contacts. These tasks can be performed in any order.

- **Manage contact information.** For more information, see "Managing Contact Information" on page 75.
- **Create customer value assessment.** For more information, see "Creating a Customer Value Assessment" on page 81.
- **View a contact summary.** For more information, see "Viewing a Contact Summary" on page 82.
- **View relationship hierarchy information.** For more information, see "Viewing a Contact Relationship Hierarchy" on page 83.
- **Create and use a Book of Clients.** For more information, see "Creating and Using a Book of Clients" on page 85.

End-User Procedures

The following end-user procedures are described in this section:

- Managing Contact Information
  - To add a contact on page 75
  - To associate a contact with a company on page 76
  - To add a category to a contact on page 77
  - To create a note regarding a contact on page 78
  - To enter a referral received to or from a contact on page 79
  - To create a referral to a contact on page 80
- Creating a Customer Value Assessment
  - To create a customer value assessment on page 81
  - To view the results of a customer value assessment on page 82
- Viewing a Contact Summary
  - To view contact summary information on page 83
- Viewing a Contact Relationship Hierarchy
  - To view a contact’s relationship hierarchy on page 83
  - To define a relationship between contacts on page 84
- Creating and Using a Book of Clients
  - To create a book of clients on page 85
  - To evaluate a book of clients on page 85

Managing Contact Information

Contacts are entities or individuals with whom the company currently does business or with whom it expects to do business in the future. End users manage contact information by:

- Adding new contacts (See "Adding Contacts" on page 75)
- Creating contact categories and notes (See "Creating Categories for Contact Information" on page 77 and "Creating Notes About a Contact" on page 78)
- Managing contact referral information (See "Managing Contact Referral Information" on page 79)

Adding Contacts

When end users meet someone in the course of business, they add a contact record for that individual to track pertinent personal information and possible potential future business.

NOTE: The My Personal Contacts view is different from the other Contacts views because it is designed for contacts not associated with a company. Therefore, in the My Personal Contacts view, adding a company to a record does not also add it to the My Contacts view, All Contacts view, and so on. End users must add business contacts in the My Contacts view proper. They must create, review, and manage activities for their personal contacts only in the Activities view of the My Personal Contacts view, not in the other Contacts views.

To add a contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select All Contacts.

3 In the Contacts form, click the show more button, add a record, and complete the necessary fields.

United States law requires that financial institutions disclose their privacy policies regarding the sharing of non-public personal information with third parties and fair credit reporting that impacts the sharing of non-public personal information with affiliates. End users can specify a privacy level by making a selection from the Privacy Option field.

4 To specify a privacy level, scroll down to the Privacy Option field and select one of the following:

- **Opt-In.** Sharing of non-public personal information is allowed without restrictions.
- **Opt-Out - Affiliates.** Sharing of non-public personal information with affiliates is not allowed.
- **Opt-Out - Third Party.** Sharing of non-public personal information with third parties is not allowed.
- **Opt-Out - All Parties.** Sharing of non-public personal information with any affiliate or third party is not allowed.

To associate a contact with a company

1 Navigate to the Contacts screen.

2 From the Show drop-down list, select My Contacts.

3 In the Contacts list, select a contact.

4 In the More Info form, click the show more button.

5 In the Company field, click the select button.

6 In the Company dialog box, click New, select a record from the Add Companies list, and then click OK.

The application automatically associates the company with the contact and populates the address with the default company address information.

7 To enter an alternate address, click the select button in the Address Line field.

The Contact Addresses dialog box appears.

8. Click New, enter the new address, and then click Save.

   The Contact Addresses dialog box displays the new company address.

9. To specify an address as the contact's primary address, click the Primary field and click OK.

   NOTE: The last address highlighted in the Companies Addresses dialog box appears in the Address Line field.

10. In the Time Zone field, select the contact's time zone.

Creating Categories for Contact Information

If the default Contacts list and More Info form do not contain fields to track the type of information that end users need to track, they can add additional categories. A manager may have set up a list of values from which they can select.

To add a category to a contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select a contact.
4. Click the Categories view tab.
5. In the Categories list, add a record.
6. In the Category field, click the select button.

   The Pick Category dialog box appears.

7. Select a category from the list of values and click OK, or click New and create a new category.
8. Complete the necessary fields.
9. Create additional categories by repeating Step 5 through Step 8.

Creating Notes About a Contact

As end users work with contacts, they learn things they may want to remember. Often these tidbits of information are best stored as notes. Users can create notes that everyone with access to the contact record can see, or they can create notes that only they can see.

To create a note regarding a contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, either select the contact for whom you wish to create a note or create a new contact.

   NOTE: If the contact does not exist, add it. For more information, see "Adding Contacts" on page 75.

4. Click the Notes view tab.
5. From the Show drop-down list, select one of the following:
   - Public Notes—Notes that others can see.
   - Private Notes—Notes that only their creators can see.
6. In the Notes list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Created Date	Automatically populates with a date and time stamp.
Type	Default value is Note. Select alternate value to categorize the type of note.
Description	Text field for the content of the note.

Managing Contact Referral Information

The Referrals view tab allows end users to enter referral information associated with contacts. Referrals are potential opportunities.

In the Referrals tab view, end users can record both referrals they give to their contacts as well as referrals received from a contact.

To enter a referral received to or from a contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select the contact for whom you wish to log a referral.
4. Click the Referrals view tab.
5. From the drop-down list, select Referrals From This Contact.
6. In the list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Company	Select an existing company or create a new one. The company selected represents the potential opportunity for your organization.
Last Name	Select a contact to associate with the referral company as selected in the Company field; if you entered a Company, the list of Contacts is restricted to those associated with the selected company. To create a new company for a referral: **1** On the Contacts screen, create contacts for the company. For more information, see “To add a contact” on page 75. **2** Associate those contacts with the new company. For more information, see “To associate a contact with a company” on page 76. **3** On Referrals view tab, select the Contact from the Pick Contact dialog box associated with this field.
Referred By	Select the employee who made the referral.

To create a referral to a contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select the contact for whom you wish to create a referral.
4. Click the Referrals view tab.
5. Scroll down to Referrals to This Contact list.
6. In the list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Disposition	The status of the referral.
Company	Select an existing company or create a new one. The company selected represents the potential opportunity for your service provider.
Last Name	Select a contact to associate with the referral company as selected in the Company field; if you entered a Company, the list of Contacts is restricted to those associated with the selected company. To create a new company for a referral: **1** On the Contacts screen, create contacts for the company. For more information, see "To add a contact" on page 75. **2** Associate those contacts with the new company. For more information, see "To associate a contact with a company" on page 76. **3** On Referrals view tab, select the Contact from the Pick Contact dialog box associated with this field.
Referred By	Select the employee from your organization who made the referral.

Creating a Customer Value Assessment

The Contacts Assessments view can help end users qualify contacts and verify resource allocation. Contact assessments are created in the Contacts Assessments view and the results are presented in the Contacts Summary view.

NOTE: A similar assessment functionality is available for companies. For more information, see "Creating Assessments for a Company" on page 59.

A customer value assessment evaluates a contact based on defined criteria. Each assessment template has a group of assessment attributes that make up the different measurement points of the assessment. A Siebel administrator can create new templates and add or modify assessment attributes. For more information on assessment templates and how to define and manage them, see *Siebel Applications Administration Guide*.

NOTE: Siebel administrators who wish to modify the Customer Value assessment template must name the template *Customer Value*. If they do not use this name, the Customer Value icon will not display the appropriate information.

To create a customer value assessment

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select the contact for whom the assessment will be added.
4. Click the Assessments view tab.
5. In the Assessments list, add a record.
6. In the Template Name field, click the select button.
7. In the Select Assessment Template dialog box, select a Template Name and click OK.

   Assessment attributes, as defined for the Customer Value template, are automatically created in the Assessment Attributes list.

8. In the Assessment Attributes list, where possible, select a value for each attribute by clicking the select button in the Value field.

Viewing the Results of a Customer Value Assessment

A customer value assessment evaluates a customer based on criteria defined by an end user's organization. The results of a customer value assessment appear in the form of a Customer Value icon. This icon appears in the Contact Summary and gives users an instant summary of the value of the customer to the financial institution. Each star represents a quartile value. For example, one star means 1% to 25% and two stars mean 25% to 50%. This four-star system allows the user to determine the value of a specific contact without having to perform complex research and analysis.

To view the results of a customer value assessment

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select the contact for whom you want to view the results of a customer value assessment.
4. Click the Summary view tab.

   The Contact Summary view appears. Each star in the Customer Value icon represents a quartile value.

NOTE: When multiple customer value assessments exist, only the data from the last customer value assessment completed is displayed.

Viewing a Contact Summary

The Contact Summary view provides a comprehensive view of a contact's relationship with an end user's organization in an editable format. This view displays the customer's contact information, financial accounts, applications, alerts, campaigns targeted at the customer, and service requests and opportunities associated with the customer.

The Customer Value icon in the Contact form indicates the customer's value to the organization. For more information, see "Creating a Customer Value Assessment" on page 81 and "Viewing the Results of a Customer Value Assessment" on page 82.

To view contact summary information

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select a contact.
4. Click the Summary view tab.

For more information on editing summary view information, see "Configuring Summary Views" on page 21.

Viewing a Contact Relationship Hierarchy

A contact's relationships are those of influence. End users may have a contact who relies heavily on the opinions of others when making purchasing or other decisions. If so, they may want to keep track of the relationships between a contact having purchasing authority and those who might influence his purchasing decisions.

End users use the Contacts Relationship Hierarchy view to identify and capture key relationships for a contact. This view features a graphical tree that provides a visual representation of a contact's relationships. The tree displays both the natural hierarchy of a contact's parent-child relationships to entities such as companies and households, as well as custom-defined relationships.

Custom-defined relationships are ad-hoc associations between the contact and any other contact, organization, or household. End users can record custom-defined relationships between any two entities in the adjacent Party Relationships list.

NOTE: The Relationship Hierarchy view is also available on the Companies and Households screens. For more information, see "Viewing a Company Relationship Hierarchy" on page 64 and "Viewing a Household Relationship Hierarchy" on page 95.

To view a contact's relationship hierarchy

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.

3 In the Contacts list, select the contact for whom you want to view a relationship hierarchy.

4 Click the Relationship Hierarchy view tab.

The Contacts Relationship Hierarchy view appears.

To define a relationship between contacts

1 Navigate to the Contacts screen.

2 From the Show drop-down list, select My Contacts.

3 In the Contacts list, select the contact for whom you want to describe relationships; if the contact does not exist, add it.

For more information on adding contacts, see "Adding Contacts" on page 75.

4 Click the Relationship Hierarchy view tab.

5 In the Party Relationship list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Relationship	Categorizes the relationship between the contacts. Field has an LOV for Custom Defined Relationship values. Pre-defined values include Reports To, Spouse, Child, Lawyer, Board Member, Primary Contact (Backup), Admin Assistant, Competitor, Referral, Service Provider, Investor, Wealth Management Rep, Related Subsidiary, Bank Attorney, Trustee Attorney, and Debtor Attorney.
Type	Defaults to Contact. Other values include Household, Organization, and Employee.
Value	Select a value from a dialog box based on the Type field selection. For example, if Type equals Contact, then clicking the select button displays the Select Contact dialog box.

The newly defined relationship is expressed in the Relationship Hierarchy explorer.

Creating and Using a Book of Clients

The Book of Clients view allows end users to create, review, delete, and modify logical groupings of contacts. After contacts are grouped together in a book, end users can conduct analyses on their book as well as graphically display performance over a period of time.

To create a book of clients

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select Book of Clients.
3. In the Book of Clients list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Book of Clients	Enter a name for the book of clients.
Team	Defaults to a value based on the login ID.
Comments	A text description of the Book of Clients.

4. In the lower Book of Clients list, add a record.

   The Add Contact dialog box appears.

5. Select a contact to add to the current Book of Clients, and click OK.

NOTE: You can add multiple contacts at once by holding down the CTRL key and clicking on each record to be added. Click OK only after you have selected all of the records to add to the Book of Clients.

The contacts appear in the lower Book of Clients list.

To evaluate a book of clients

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select Book of Clients.

3 In the Book of Clients list, select a book to evaluate.

4 In the lower Book of Clients list, select one of the Show drop-down list options described in the following table.

Show	Comments
Book of Clients	Create and view the contacts in a book of clients.
Book of Clients Performance	Display key metrics for assessing an entire book of clients' performance.
Book of Clients Summary	Displays summary information for each contact in a book of clients, including opportunities, financial accounts, service requests, alerts, affiliations, and customer value.

Households 6

A *household* is a group of contacts generally sharing a common link or association. Households provide valuable segmentation information on the household as a whole, as well as a summary of information about the household member contacts. Users can use the Households screen for identifying and capturing demographic information about a household. They can also use the Households screen to review customer’s financial accounts, products, and contact information associated with that household. This information allows them to assess customers’ data.

CAUTION: This chapter assumes you have renamed Siebel Account objects to *Companies*. By default, Siebel eHealthcare installs using the term *Accounts*. For more information on renaming Siebel Account objects, see the *Upgrade Guide* for your operating system.

Grouping all of a customer’s accounts by household allows a service provider to identify a client’s real value to the organization and seek opportunities to cross-sell and up-sell additional products and services to them, such as homeowners insurance and loans for children’s education. In addition, the ability to view all of a customer's financial accounts and related portfolio information by household allows an organization to view the household’s overall financial position.

By following the procedures described in this chapter, users can enter, manage, and review information about household members (contacts), accounts, policies, underwriting reports, claims, opportunities, activities, service requests, and relationship hierarchies.

NOTE: Many of the views are read-only, as they provide a summary of information about household contacts. The only editable views are More Info and Contacts.

The Households screen and associated views that appear in Siebel eHealthcare share much of the functionality found in Siebel eBusiness Applications. This chapter focuses on the household functionality that is unique to Siebel eHealthcare. For more information on basic household functionality, see *Siebel Call Center User Guide*.

Business Scenario

These scenarios are examples of workflows performed by sales representatives and their managers in the insurance and healthcare industries. Your company may follow a different workflow according to its business requirements.

Household information supports sales and service decisions for segmentation and cross-selling. It also provides background information for the finance and insurance industries about a household and all of its contacts.

A sales representative in the banking industry uses the Household screen for identifying and capturing demographic and relationship information about the household and for reviewing accounts and products associated with that household. From the Households screen, the sales representative creates a new household for a new customer. He then adds contacts to the household.

Next, using the Relationship Hierarchy view, the sales representative reviews the various parties related to the household.

Some weeks later, the sales representative wants to review household information. He navigates to the My Households view and then selects the Insurance Summary view to review a list of contacts, service requests, policies and quotes, and claims associated with a household.

NOTE: In the wealth management industry, a relationship manager, retail broker, or wealth manager has access to view the household's aggregated holdings within their financial accounts, the performance on these accounts, cash flows expected for the household for a specified period, and the household's current versus model portfolio allocations by sector and by asset class. For more information, see "Viewing and Evaluating Household Portfolios" on page 96.

In this scenario, end users are the sales representatives who manage household information in the field. They enter and review information to:

- Add a household
- Add a contact to a household
- View household summary information

- View household relationships
- View household financial account, performance, cash flow, and portfolio allocation details

Households Sample Tasks

Figure 3 illustrates sample tasks that end users typically perform when managing households.

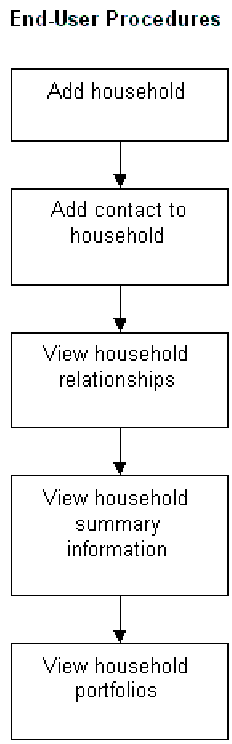

Figure 3. Households Sample Tasks

End-User Procedures

The following end-user procedures are described in this section:

- To add a household
- To add a contact to a household on page 93
- To view household summary information on page 94
- To create a custom-defined relationship on page 95
- To select a financial account associated with a household on page 97
- To view aggregated holdings for a financial account on page 97
- To compare account holdings against a portfolio model on page 97
- To view the selected account holdings by sector on page 98
- To view expected future cash flows for selected accounts on page 98
- To view selected accounts' past performance on page 98

Adding a Household

End users can collect and manage information about a customer's household.

To add a household

1. Navigate to the Households screen.
2. From the Show drop-down list, select My Households.

3 In the Households form, click the show more button, add a record, and complete the necessary fields.

The application automatically assigns the household an ID number in the Household # field.

United States law requires that financial institutions disclose their privacy policies regarding the sharing of non-public personal information with third parties and fair credit reporting that impacts the sharing of non-public personal information with affiliates. End users can specify a privacy level by making a selection from the Privacy Option field.

4 To specify a privacy level, scroll down to the Privacy Option field and select one of the following:

- **Opt-In.** Sharing of non-public personal information is allowed without restrictions.
- **Opt-Out - Affiliates.** Sharing of non-public personal information with affiliates is not allowed.
- **Opt-Out - Third Party.** Sharing of non-public personal information with third parties is not allowed.
- **Opt-Out - All Parties.** Sharing of non-public personal information with any affiliate or third party is not allowed.

Adding a Contact to a Household

Contacts are persons associated with a household. End users can specify one person in the household as the head of household and then identify the others as spouse, child, or dependent parent.

To add a contact to a household

1 Navigate to the Households screen.

2 From the Show drop-down list, select My Households.

3 In the Households list, select the household to which the contacts will be added.

4 Click the Contacts view tab.

5. In the Contacts list, add a record.

   The Add Contacts dialog box appears.

6. In the Add Contacts dialog box, you can do one of the following:

   - Select an existing contact and click OK.
   - Perform a query to choose an existing contact.
   - Select New to add a new contact.

   The contact is associated with the household.

NOTE: In the Households screen, a contact's address is his or her residential or personal address. In the Contact's screen, a contact's address is his or her work address. Household addresses can only be selected from among residential addresses.

Viewing a Household Summary

The Household Summary view provides a comprehensive view of the household's relationship with an end user's organization in an editable format. This view displays basic information about the household, contacts, financial accounts, and past or pending service requests.

To view household summary information

1. Navigate to the Households screen.
2. From the Show drop-down list, select My Households.
3. Click the Summary view tab.

For more information on editing summary view information, see "Configuring Summary Views" on page 21.

Viewing a Household Relationship Hierarchy

End users use the Household Relationship Hierarchy view to identify and capture key relationships for a household. This view features a graphical tree that provides a visual representation of a household's relationships. Users can create custom-defined relationships between a household and any contact or organization. End users can record custom-defined relationships between any two entities in the adjacent Party Relationships list.

NOTE: The Relationship Hierarchy view is also available on the Contacts and Companies screens. For more information, see "Viewing a Contact Relationship Hierarchy" on page 83 and "Viewing a Company Relationship Hierarchy" on page 64.

To create a custom-defined relationship

1. Navigate to the Households screen.
2. From the Show drop-down list, select My Households.
3. Click the Relationship Hierarchy view tab.
4. In the Party Relationship list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Relationship	Categorizes the relationship between the household and the other entity. Field has an LOV for custom-defined Relationship values. Pre-defined values include Reports To, Spouse, Child, Lawyer, Board Member, Primary Contact (Backup), Admin Assistant, Competitor, Referral, Service Provider, Investor, Wealth Management Rep, Related Subsidiary, Bank Attorney, Trustee Attorney, and Debtor Attorney.

Field	Comments
Type	Use this field to determine the type of entity with which you wish to establish a relationship. Defaults to Contact. Other values include Household, Organization, and Employee.
Value	The value in this field is based on the Type field. For example, if Type equals Contact, then clicking the select button in Value field displays the Select Contact dialog box.

The newly defined relationship appears in the Relationship Hierarchy explorer.

Viewing and Evaluating Household Portfolios

End users can use the Financial Accounts view tab to view a household's portfolio information from a number of different perspectives:

- **Financial Accounts list.** Displays financial accounts associated with contacts in the selected household. For more information, see "To select a financial account associated with a household" on page 97.
- **Aggregated Holdings List.** Displays holdings within the selected accounts by asset class, such as securities, mutual funds, or bonds. For more information, see "To view aggregated holdings for a financial account" on page 97.
- **Class Allocation List.** Displays a comparison of the selected account holdings against a portfolio model. For more information, see "To compare account holdings against a portfolio model" on page 97.
- **Sector Allocation List.** Displays the selected account holdings by sector, enabling the user to view the degree of portfolio diversification. For more information, see "To view the selected account holdings by sector" on page 98.
- **Cash Flow List.** Displays future cash flows for the selected financial accounts. This view allows users to estimate the amount of cash that may be available for future investments. For more information, see "To view expected future cash flows for selected accounts" on page 98.
- **Performance List.** Displays how the selected accounts have performed over time. For more information, see "To view selected accounts' past performance" on page 98.

To select a financial account associated with a household

1. Navigate to the Households screen.
2. From the Show drop-down list, select My Households.
3. In the Households list, select a household.
4. Click the Financial Accounts view tab.
5. In the Financial Accounts list, select the Aggregated Select field for the accounts you want to select.

   NOTE: You can also click Select All to select all accounts, or click Select None to clear all accounts.

To view aggregated holdings for a financial account

1. Select the financial accounts. (See "To select a financial account associated with a household" on page 97.)
2. In the Financial Accounts list, click Generate Holdings.

   The Aggregated Holdings list appears, displaying all holdings in the selected account by asset class, such as securities, mutual funds, or bonds. Selecting a specific asset class in the Aggregated Holdings displays the individual positions in the Holdings subview.

To compare account holdings against a portfolio model

1. Select the financial accounts. (See "To select a financial account associated with a household" on page 97.)
2. Click the Class Allocation subview tab.
3. In the Financial Accounts list, select a portfolio model from the drop-down list and click Go.

   The Class Allocation list and model and actual holdings charts appear.

To view the selected account holdings by sector

1 Select the financial accounts. (See "To select a financial account associated with a household" on page 97.)

2 Click the Sector Allocation subview tab.

3 In the Financial Accounts list, select a sector from the drop-down list and click Go.

 The Sector Allocation list appears, displaying the account holdings by sector, enabling the user to view the degree of portfolio diversification versus the selected model portfolio.

To view expected future cash flows for selected accounts

1 Select the financial accounts. (See "To select a financial account associated with a household" on page 97.)

2 Click the Cash Flow subview tab.

3 In the Financial Accounts list, click Generate Cash Flow.

4 In the period filter, select the period for which you want to view cash flows and click Go.

 The Cash Flow subview displays an estimate of the amount of cash that may be available for future investments.

To view selected accounts' past performance

1 Select the financial accounts. (See "To select a financial account associated with a household" on page 97.)

2 Click the Performance subview tab.

3 In the period filter, select the period for which you wish to view an account's performance and click Go.

 The Cash Flow list appears, displaying how the account performed over time.

7 Call Reports

Call reports are records of meetings and other conversations with clients, organizations, and individuals. Call reports are often required of employees for the following reasons:

- Call reports are a means for new relationship managers to learn about the client and its history with the organization.
- Call reports allow senior managers and product specialists associated with a certain client to keep up with the developments in the client relationship, even if they do not meet with the client on a regular basis.
- Call reports provide a record of important and informal agreements. In the event that a failed financing transaction results in legal proceedings, these reports are an important component of the legal process.

Using the procedures given in this chapter, you will be able to perform the administrator tasks of viewing a chart of call reports and how to manage call report templates. End users use the Call Reports screen to add a new call report, create a call report distribution list, designate a report as private, and email or print call reports.

Siebel eHealthcare can provide notification of new call reports to designated individuals. For more information, see *Siebel Business Process Designer Administration Guide for Financial Services*.

Business Scenario

This scenario features sample tasks performed by a sales representative at a healthcare company and his manager. The scenario outlined in this section is based on the business requirements of the healthcare industry. Your company may follow a different workflow according to its business requirements.

After returning to the office following a successful meeting with the client, a sales representative for the Large Group Division of a healthcare company loads Siebel eHealthcare to complete his call report. The representative navigates to his calendar and marks the meeting as Done. He then navigates to the Call Reports screen and enters a new call report to document the meeting. In the Report Detail view, he types a brief log of the meeting and adds the names of contacts and employees who participated.

Upon completing his report, the sales representative turns to the action items that resulted from the meeting. First, he needs to send an email to a fellow employee to tell her about the meeting. He uses the Email Report button on the Call Report form to accomplish this task.

Next, he remembers that he promised to include the client on the invitation list for the upcoming Charity Ball, so he adds an action item on the Call Reports Action Items view tab. He does this by clicking Add Action Items on the Call Report form. After he enters his action item, along with several others, he assigns them to members of his team for follow-up.

The sales representative's boss is also a member of the client team. When she arrives in the office the next day and loads Siebel eHealthcare, she reviews the new call reports on the Call Reports screen, reading about the meeting details and notes.

In this scenario, managers or Siebel administrators can view graphical representations of their call reports call, volume analysis of their own calls, their team's calls, or all call reports in Siebel eHealthcare.

The end users are sales representatives who create call reports to record their meetings and activities. They enter information to:

- Create new call reports
- Create call report distribution lists

- Create call report action items
- Attach related documents
- Specify a call report as private
- Review and add additional notes or comments
- Email or print call reports

Call Reports Sample Tasks

Figure 4 illustrates sample tasks that administrators and end users typically perform when managing call reports.

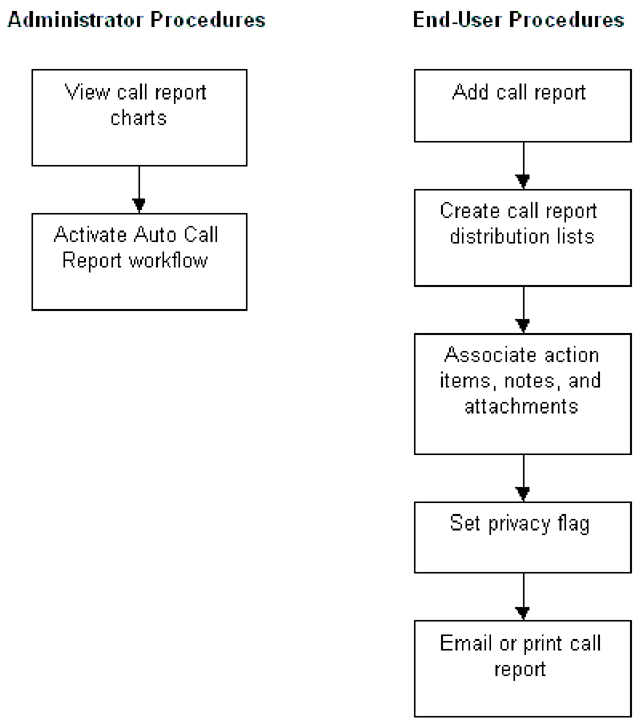

Figure 4. Call Reports Sample Tasks

Administrator Procedures

The following administrator procedures are described in this section:

- To view a chart for your call reports
- To activate the Auto Call Report Workflow on page 104

Viewing Call Report Charts

As a manager or Siebel administrator, you can use the Call Report Charts view for call volume analysis of your own calls, your team's calls, or all call reports in Siebel eHealthcare. Using this view, you can analyze call volume and call types by employee and by customer to determine which clients are receiving the most service.

To view a chart for your call reports

1. Navigate to the Call Reports screen.
2. From the Show drop-down list, select one of the following:
   - My Call Reports
   - My Team's Call Reports
   - All Call Reports

   The view selected returns an appropriate set of call report records to be analyzed.
3. Click the Charts view tab.

   The chart reflects only those call report records which are currently selected; that is, those records listed in the Call Reports list above the chart.

4 From the lower Show drop-down list, select one of the following chart types:

Chart	Comments
Call Type Analysis	A breakdown of all selected call reports by Call Type.
Call Volume Analysis	Charts the number of calls per month, quarter, or year.
Call Volume by Employee	Charts the number of calls per month, quarter, or year, per employee.
Company Calling Analysis	Charts the number of calls per company.
Employee Calling Analysis	Charts the number of calls per company, by employee.

NOTE: Place your cursor over any chart segment to reveal additional information about that segment. Click a segment to drill down and refocus on just the call reports in that segment.

Activating the Auto Call Report Workflow

When activated, the Auto Call Report Workflow allows end users to create call report records automatically from the Contacts, Companies, Activities, and Call Reports screens. After the administrator activates the Auto Call Report Workflow, end users will see the Auto Call Report icon in the upper left corner of those screens.

To activate the Auto Call Report Workflow

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Workflow Processes list, select the New Call Report Workflow record.
3. Click the Activate button at the top of the list to activate this workflow process.
4. Reload personalization rules in Runtime Event Administration. For more information, see *Personalization Administration Guide*.

To use the Auto Call Report feature once activated, end users can either click the icon, can choose File > Auto > Call Report from the application-level menu, or can use the short cut key Alt + P.

NOTE: The Auto Call Report Workflow uses the Data Transfer Utility business service to transfer fields from one view to another. To modify the Auto Call Report Workflow so that it is available from more screens or to populate more fields when moving from one screen to the next, see the Data Transfer Utility section in *Siebel Business Process Designer Administration Guide*. The current Data Map Objects used for the Auto Call Report in the Data Transfer Utility business service include: Auto Call Report - Account, Auto Call Report - Activity, Auto Call Report - Contact, and Auto Call Report - Opportunity.

End-User Procedures

The following end-user procedures are described in this section:

- To add a call report
- To create a distribution list on page 108
- To associate action items, notes, and attachments on page 109
- To set a privacy flag on page 109
- To email or print a call report on page 110

Managing Call Reports

Managing Call Reports entails adding, modifying, and deleting call reports. After a call report is added, end users can associate it with action items, notes, and attachments.

NOTE: Call report attachments, like the attachments for other activities, are stored in the S_ACTIVITY_ATT table.

To add a call report

1. Navigate to the Call Reports screen.
2. From the Show drop-down list, select My Call Reports.

3 In the More Info form, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Associated Activity	The activity that is the subject of the call report; each call report can have only one associated activity. Selection of the associated activity is governed by the following constraints if those fields are populated: ■ Same Company ID ■ Same Primary Opportunity ID ■ Same Primary Contact ID
Contacts	Enter the participating contacts who were at the meeting. Designate a primary contact if desired, otherwise the first contact selected will be defaulted as the primary. Entries appear in the Report Detail view and on the printed Call Report.
Description	A summary description of the call report; enter a more detailed report in the Report Detail view.
Distribution	List additional employees from your organization who should receive the Call Report, but should not appear on the list of participants. The call report creator and all Employee Participants are automatically placed on the distribution list.
Employees	List employees from your organization who participated in the call. Entries appear in the Report Detail view and on the printed Call Report. The call report creator is automatically listed as a participant.
Opportunity	Associate an opportunity with the call report. You can view all call reports associated with any given opportunity from the Opportunities screen.
Type	The LOV type for this field is FINCORP_CALLRPT_CONTACT_TYPE.

NOTE: In the Call Reports list, the New flag is a calculated field and appears checked for five days after the creation of a call report. Your systems administrator can change this setting.

4 In the Call Reports list, drill down on the Description hyperlink to navigate to the Report Detail view.

The Call Report form appears.

5 In the Call Report form, enter detailed information about the call. Information you enter here appears in emailed or printed call reports.

Creating a Distribution List

A distribution list is the list of contacts who need to know what is happening with a particular client. Usually, it is the coverage team for the client, plus any additional employee participants. The application automatically places the call report creator and each employee participant on the distribution list. For other employees, such as the coverage team, to receive a call report, end users must manually add them to the distribution list.

When end users use the call report Email Report feature, the distribution list controls who receives the report. The call report Print Report function and the Send Email function, both available through the application-level File menu (F9), are not affected by the distribution list.

To create a distribution list

1 Navigate to the Call Reports screen.

2 From the Show drop-down list, select My Call Reports.

3 In the Call Reports list, select the call report for which you want to create a distribution list.

4 In the Distribution field, click the select button.

5 In the Employees dialog box, click New.

6 In the Add Positions dialog box, select one or more employees to add to the distribution list and click OK.

The Employees dialog box reappears with the selected name or names added to the distribution list.

7 Click OK.

Associating Action Items, Notes, and Attachments

After an end user has added a call report, they can associate it with action items, notes, and attachments.

To associate action items, notes, and attachments

1. Navigate to the Call Reports screen.
2. From the Show drop-down list, select My Call Reports.
3. In the Call Reports list, select a call report.
4. Click the Report Detail view tab.
5. In the Employee Participants and Contact Participants lists, add a new record as appropriate to capture report detail information.
6. To add notes or action items to the call report, click the appropriate button in the Call Report form:
   - **Add Notes.** To add notes or comments.
   - **Add Action Items.** To add an action item.
7. To attach external documents to a call report, click the Attachments view tab.
8. In the appropriate list, add a record and complete the necessary fields.

Setting the Privacy Flag

Certain call reports may contain highly sensitive or confidential information about a given company or opportunity. Users can designate certain calls as private by clicking the Private check box in the form or list of the call report. After a call report is marked private, only those on the distribution list have access to it. For more information on the distribution list, see "Creating a Distribution List" on page 108.

To set a privacy flag

1. Navigate to the Call Reports screen.
2. From the Show drop-down list, select My Call Reports.

3 In the Call Reports list, select the call report that you want to mark as private and click the Private field.

   The call report is now categorized as private. Only the employees on the distribution list can access it.

Emailing and Printing a Call Report

Call reports can be emailed or printed for distribution and record keeping.

To email or print a call report

1. Navigate to the Call Reports screen.
2. From the Show drop-down list, select My Call Reports.
3. In the Call Reports list, select the call report that you want to email or print.
4. Click the Report Detail view tab.
5. In the Call Report form, do one of the following:
   - To email the report, click Email Report.

     The report is automatically emailed to everyone on the distribution list.
   - To print the report, click Print Report.

     In the Reports dialog box, select Summary or Detail and click Run.

Facilities 8

Facilities are healthcare organizations that are paid by or file claims with your health plan or health insurance company. Examples of facilities are hospitals, clinics, and pharmacies. Facilities are also referred to as provider organizations.

Using the procedures given in this chapter, you will be able to perform the administrator tasks of adding facilities to Facility Locator. End users use the Facilities screens to associate providers, facilities, and contacts with a facility, add a facility contract, add a facility payment, and add a facility claim.

Business Scenario

This scenario features sample tasks performed by a contracting specialist. Your company may follow a different workflow according to its business requirements.

In this scenario, a contracting specialist for a health plan is responsible for managing information about the healthcare facilities, such as hospitals and healthcare networks, with which your company does business. She just established a contract with a single facility.

She adds the new facility to the Siebel database. Next, she adds information about the facility's business hours and specialties. Then, she associates the facility with individual providers and with other facilities. Next, she adds information about contracts the facility holds with your company along with the facility's payment preferences.

In this scenario, the end users are contracting specialists for a health plan. They enter information to:

- Add new facilities
- Associate providers, facilities, and contacts with a facility
- Add facility contracts, facility payments, or facility claims

Facilities Sample Tasks

Figure 5 illustrates sample tasks that administrators and end users typically perform when managing facilities.

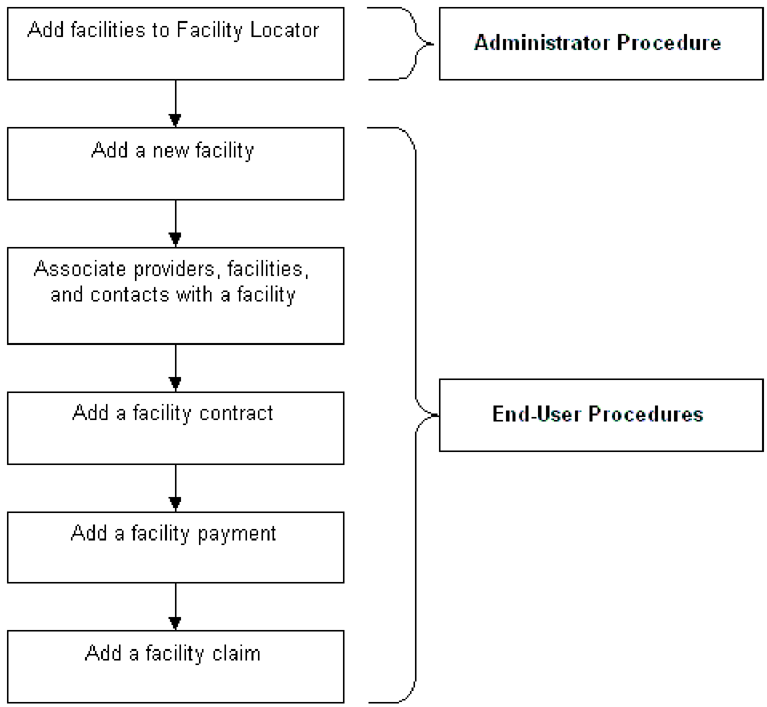

Figure 5. Facilities Sample Tasks

Administrator Procedures

The following administrator procedure is described in this section:

- To add a facility to the facility locator

Adding Facilities to the Facility Locator

As an administrator, you can add facilities to the facility locator. The facility locator searches for facilities using latitude and longitude. If you do not know the latitude and longitude, leave those fields blank. If the City, State, Zip Code, and Country fields are correct, the latitude and longitude values will automatically generate when you save the facility.

NOTE: The latitude and longitude values will not generate if any one value in the City, State, Zip Code, or Country fields is incorrect. For example, if the ZIP Code is incorrect, you will receive an error message. To correct this problem, navigate to the Application Administration, ZIP Code Administration view and make sure the Geo values for that city, state, and ZIP Code combination has been loaded. For more information, see *Siebel eService Administration Guide*.

To add a facility to the facility locator

1. From the application-level menu, choose Site Map > Application Administration > Branch/Facility Locator Administration.
2. In the Branch/Facility Locations list, add a record.
3. In the Branch/Facility Locations list, complete the necessary fields.

End-User Procedures

The following end-user procedures are described in this section:

- To add a facility
- To associate a provider, facility, or contact with a facility on page 116
- To add a facility contract on page 117
- To add a facility payment on page 117
- To add a facility claim on page 118

Adding Facilities

End users can add or change healthcare facility records. After users add facility records in the Facilities screen, they can view them in both the Facilities screen and the Companies screen. In the Companies screen, a check mark appears in the Facility field of the record, indicating that the company is a facility.

NOTE: If users add healthcare facility records in the Companies screen, they will not appear in the Facilities screen.

To add a facility

1. Navigate to the Facilities screen.
2. In the Facilities list, add a record and complete the necessary fields.

NOTE: Records in the Facilities list contain a few of the most frequently used facility fields. You can add text into additional fields, such as Main Office, in the More Info form.

Associating Providers, Facilities, and Contacts with a Facility

Facilities usually have affiliations with providers, other facilities, or contacts. For example, a hospital may be affiliated with a clinic.

To associate a provider, facility, or contact with a facility

1 Navigate to the Facilities screen.

2 In the Facilities list, select the facility with which you want to associate a provider, facility, or contact.

3 Click the appropriate view tab:

- **Summary.** To associate a contact with a facility, use the Contacts list on this view tab.
- **Affiliated Providers.** To associate a provider with a facility.
- **Facility Affiliations.** To associate a facility with another facility.

4 If the provider, facility, or contact you want to choose is in the selected list, select the record and click OK.

5 If the record does not appear in the list:

a In the selected list, click New.

b In the dialog box, add a record and complete the fields or select an existing record.

Adding Facility Contracts

A company may have contracts with a facility or provider organization, in addition to contracts with individual providers. For example, they may have a contract with a pharmacy or clinic. Each contract may have different terms, payment preferences, and payment methods.

End users can set up payment preferences and payment methods for facilities. Their company may have more than one contract with a facility. They can set up different payment arrangements and methods for each contract.

To add a facility contract

1. Navigate to the Facilities screen.
2. In the Facilities list, select a facility.
3. Click the Contracts view tab.
4. In the Contracts list, add a record and complete the necessary fields.
5. If payments will be made by EFT or check, scroll down to the Payment Preferences - Check form and select one of the following from the drop-down list:
   - **Payment Preferences - Check.** To add information for check payments.
   - **Payment Preferences - EFT.** To add information for electronic funds transfer payments.
6. Complete the necessary fields.

Adding Facility Payments

End users can add information about payments their company makes to facilities. Payment information can include payment amount, payment date, payment adjustments, and reason for payment.

Facility payments may be imported from a bill payment engine by using Siebel eBusiness Application Integration. For more information, see "Integration" on page 191 and *Overview: Siebel eBusiness Application Integration Volume I*.

To add a facility payment

1. Navigate to the Facilities screen.
2. In the Facilities list, select a facility.
3. Click the Payments view tab.

4 In the Payment list, add a record and complete the necessary fields.

NOTE: Records in the Payments list contain a few of the most frequently used payment fields. To add text into additional fields, such as Check #, scroll down to the Payment Details form.

Adding Facility Claims

A contract with a facility may specify that the facility should be paid each time it provides a service to a member. If so, the facility or member may contact a company to initiate claims for payment.

Facility claims may be imported from a claims processing engine, by using Siebel eBusiness Application Integration. For more information, see "Integration" on page 191 and *Overview: Siebel eBusiness Application Integration Volume I*.

To add a facility claim

1. Navigate to the Facilities screen.
2. In the Facilities list, select a facility.
3. Click the Claims view tab.
4. In the Claims list, add a record.
5. In the Add Claims dialog box, perform the appropriate task:
   - To choose an existing record, select a record and click OK.
   - To add a new record, click New and complete the fields.

NOTE: Records in the Claims list contain a few of the most frequently used claims fields. To add text into additional fields, scroll down to the Claims form.

Individual Health Policies 9

Individual health policies are insurance policies issued to individuals for themselves and their family members or dependents. Each individual health policy includes one primary member and may include additional members.

Each individual health policy offers one or more products, called policy coverages. Examples of individual health insurance products are HMO, PPO, dental, and vision coverage.

The Individual Health Policies screen allows end users to manage individual health insurance policies. Using the procedures given in this chapter, end users can generate quotes, accept applications, handling service requests, and process claims.

NOTE: In order to generate quotes from the Individual Health Policies screen, you must purchase the Siebel Proposals & Presentations module.

For more information on views common to all policy screens, see "Common Policy Views" on page 132.

Business Scenario

This scenario features sample tasks performed by a licensed sales representative. Your company may follow a different workflow according to its business requirements.

In this scenario, a licensed sales representative for an insurance company is on the phone with a prospective customer who has called to request a quote for individual health insurance.

The sales representative adds information about the prospect and the prospect's dependents (including coordination of benefits). The prospect requests a quote for PPO coverage, dental insurance, and vision insurance. The sales representative adds the products and reviews the product attributes. Next, he asks the prospect for enough information to provide an initial premium quote to the prospect. He gives the prospect a verbal quote and ends the conversation.

One week later, he receives an email message that the prospect has called back and would like to purchase a policy. In Siebel eHealthcare, he adds information about coverages for each applicant according to the needs of the prospect. In this case, one of the dependents will receive both dental and vision coverage. Another will receive vision coverage only. Therefore, he associates the first dependent with both vision and dental, and the second dependent with vision only. Next, he schedules an activity as a reminder to call the prospect back with the revised premium information.

During the second call, he gathers information from the prospect in order to process the application. First, he performs a health risk assessment for each applicant. Then he adds billing and payment arrangements. Finally, he follows the procedures implemented by his company to submit the policy for issuance and billing.

In this scenario, end users are a sales representatives who manages customer requests. They enter information to:

- Generate customer quotes
- Add an applicant
- Perform a health risk assessment
- Convert a quote to an active policy

- Associate a policy coverage with an applicant
- Add a service request
- Set up a payment plan
- Add detailed payment information for a payment plan

Individual Health Policies Sample Tasks

This section details sample tasks often performed by administrators and end-users when managing individual health policies. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to manage individual health policies.

- **Define products and specify product line types.** For more information, see "Adding Products and Product Lines" on page 123.
- **Add rate band information such as deductibles, premiums, and payroll deductions for each insurance product.** For more information, see "Adding Rate Bands" on page 124.

End-User Procedures

The following list shows tasks end users typically perform when managing individual health policies.

- **Provide quotes.** For more information, see "Providing Quotes" on page 125.
- **Accept applications by adding applicants, performing health risk assessments, and associating policy coverages with each applicant.** For more information, see "Accepting Applications" on page 127.
- **Add service requests.** For more information, see "Adding Service Requests" on page 129.
- **Set up payment plans.** For more information, see "Setting Up Pay Plans" on page 130.

Administrator Procedures

The following administrator procedures are described in this section:

- To add an insurance product
- To specify product line type on page 123
- To add a rate band on page 124

NOTE: Only those with Siebel administrator responsibilities can change entries in the Insurance Administration and Product Administration screens.

Adding Products and Product Lines

As an administrator, you can add products to the Siebel database. This section describes the procedure for setting up products and product lines in general terms.

You can also specify that a product line is one that your company contracts agencies to sell, or that the state licenses agencies to sell, or both.

To add an insurance product

1. Set up the product class structure, including product class attributes.

   For more information about adding product classes, see *Applications Administration Guide*.

2. Add the products to the Siebel database and associate them with the appropriate class.
3. In the Category field in the Products list, select Individual Health Insurance.
4. Include the product in a product line.

To specify product line type

1. From the application-level menu, choose View > Site Map > Application Administration > Product Lines.
2. In the Product Line list, select one or both of the following fields:

- **Contracting.** To specify that the product line is one that your company contracts agencies to sell.

  This product line will appear to end-users as a choice in the Lines of Business dialog box in the Partners screen > Contracts view tab.

- **Licensing.** To specify that the product line is one that agencies can be granted a state license to sell.

  This product line will appear to end-users as a choice in the Lines of Business dialog box in the Partners screen > Licenses & Appointments view tab.

A check box appears in the middle of the field.

3. To specify a product line as contracted or licensed, click the appropriate column.

   For more information about adding products and product lines, see *Product Administration Guide.*

Adding Rate Bands

After you add a product in the Product Administration screen, you can use the Insurance Administration screen to associate a rate band with the product. A rate band is pricing information about the deductible, the premium, and the payroll deduction for each insurance product.

To add a rate band

1. From the application-level menu, choose View > Site Map > Insurance Administration > Health and Group Products.
2. In the Products list, select a product.
3. In the Rate Bands list, add a record and complete the necessary fields.

End-User Procedures

The following end-user procedures are described in this section:

- To provide a quote
- To add an applicant on page 127
- To perform a health risk assessment on page 128
- To convert a quote to an active policy on page 128
- To associate policy coverages with an applicant on page 129
- To add a service request on page 129
- To set up a pay plan for an individual health policy on page 130
- To add detailed billing information for a pay plan on page 130

Providing Quotes

In Siebel eHealthcare, a quote is a policy that has not been issued. End users can provide a quote for a new policy or make changes to an existing quote. The following procedure shows how to provide a quote for a new policy. The Individual Health Policies screen captures the information necessary to generate a quote. If a plan has predefined rates for individuals, Siebel eHealthcare can access this information in two ways:

- Using Siebel Pricer. For information, see *Pricing Administration Guide*.
- Using an external table that your company has integrated with Siebel eHealthcare.

To provide a quote

1. Navigate to the Individual Health Policies screen.
2. In the Individual Health Policies list, add a record and complete the necessary fields.
3. To add a new applicant:
   a. Click the Applicants view tab.

- **b** Scroll down to the Applicants form and add a record.
- **c** In the Add Applicants dialog box, select an existing applicant or click New to add a new applicant.

  If you select an existing contact who is not a member, the Coordination of Benefits field will not be hyperlinked to the Members > Applicants view.
- **d** Repeat Step 3 for each new applicant that you want to add to this quote.

4 To select an existing contact:

- **a** Click the Applicants view tab.
- **b** Scroll down to the Applicants form and click the Show More button.
- **c** In the Applicants form, add a record.
- **d** In the Add Applicants dialog box, select a record and click OK.

NOTE: If you select an existing contact who is not a member, the Coordination of Benefits field will not be hyperlinked to the Members > Applicants view.

- **e** To specify a contact as a member, select the Members check box.

  After you save the record, the Coordination of Benefits value is hyperlinked to the Members > Applicants view.
- **f** If you plan to add records to the Coordination of Benefits field, select the Coordination of Benefits check box.

  After you save the record, the Coordination of Benefits field changes to Yes.
- **g** Repeat Step 4 for each existing contact that you want to add to this quote.

NOTE: For information about Coordination of Benefits, see "Adding a Member's Additional Benefits Coverage" on page 156.

---

5 In the Applicants list, select the record for the primary applicant for this quote and click the Primary field.

A check mark appears, indicating that this applicant is the primary applicant.

NOTE: If you do not select the primary field for one of the applicants, you will not be able to successfully add a product in the Policy Coverages view.

---

6 Click the Policy Coverages view tab.

7 In the Policy Coverages product list, add a record and complete the necessary fields.

8 Repeat Step 6 and Step 7 for each product you would like to add for this applicant.

After end users generate the quote, the Primary field is automatically added. The quote for this applicant appears in the Premium Totals field in the Policy Coverages list.

Accepting Applications

Accepting applications requires adding applicants, performing health risk assessments for each applicant, and associating policy coverages with each applicant. If end users have already provided a quote for an application, they can begin by performing a health risk assessment for each applicant listed in the quote.

To add an applicant

1 Navigate to the Individual Health Policies screen.

2 Click the Applicants view tab.

3 In the Applicants list, add a record.

4 In the Add Applicants dialog box, perform the appropriate task:

- To choose an existing record, select a record and click OK.

- To add a new record, click New and complete the fields.

NOTE: The Primary field is filled automatically after you generate a quote.

---

5. Repeat Step 3 and Step 4 for each applicant you would like to add.
6. In the Applicants list, select the record for the primary applicant for this quote and click the Primary field.

   A check box appears in the Primary field.
7. If the check box is empty, select it.

   A check mark appears, indicating that the selected applicant is the primary applicant.

After end users add an applicant, they need to perform a health risk assessment for each one.

To perform a health risk assessment

1. Navigate to the Individual Health Policies screen.
2. In the Individual Health Policies list, select a record.
3. Click the Health Risk Assessments view tab.

   The Health Risk Assessments form appears, showing the selected record.
4. Scroll down to the Risk Assessment form, add a record, and complete the necessary fields
5. Repeat Step 4 for each applicant.

After end users complete the risk assessment, they can convert the quote to an active policy.

To convert a quote to an active policy

1. Navigate to the Individual Health Policies screen.
2. In the Individual Health Policies list, select a record.

3 Click the Applicants view tab and scroll up to the Individual Health Policies form.

4 In the Individual Health Policies, More Info form, change the following fields:

   a In the Status field, select Inforce.

   b In the Effective Date field, add the date that the policy will go into effect.

After end users convert the quote to an active policy, they can associate policy coverages with an applicant.

To associate policy coverages with an applicant

1 Navigate to the Individual Health Policies screen.

2 Select the record in the Individual Health Policies list for which you would like to set up policy coverages.

3 Click the Member Coverages view tab.

4 In the Member Coverages product list, add a record, and complete the necessary fields.

5 Repeat Step 4 for each additional applicant.

NOTE: You can also use the Member Coverage Matrix view to select applicant and dependent coverages. However, the Member Coverage view should be used to associate a primary care provider. For additional information, see “Changing a PCP or a Primary Network or IPA for Members” on page 155.

Adding Service Requests

End users can add service requests for individual health policies. Examples of service requests are a change of primary care provider, a request for literature, or a question about an insurance claim.

To add a service request

1 Navigate to the Individual Health Policies screen.

2 In the Individual Health Policies list, select a policy.

3 Click the Service Requests view tab.

4 In the Service Requests list, add a record and complete the necessary fields.

Setting Up Pay Plans

End users can use the Pay Plans view tab to set up pay plans for individual health insurance policies and to add details about payment methods and due dates.

To set up a pay plan for an individual health policy

1 Navigate to the Individual Health Policies screen.

2 In the Individual Health Policies list, select a policy, and click the Bill To view tab.

3 In the Pay Plan list, add a record and complete the necessary fields.

4 Scroll down to the Bill To Address form.

5 In the Bill To Address form, in the Last Name field, click the select button.

6 In the Pick Contact dialog box, select a contact and click OK.

After end users complete the Bill To Address form, they can add pay plan information.

To add detailed billing information for a pay plan

1 Click the Pay Plans view tab.

2 In the Pay Plans list, add a record and complete the necessary fields.

Group Policies 10

Group policies are insurance policies sold to a group on behalf of its members. The group is the insured party and can be an employer purchasing insurance for its employees, a group of employers who are purchasing insurance together, or an association or club purchasing insurance for its members.

Each group policy can offer many products. Group insurance products include group life, supplemental group life, group disability, group health, vision, and dental.

Some group policies, especially those for larger groups, offer different products to different employee classes of group members. Examples of employee classes are salaried employees and hourly employees.

Group members have the option to accept coverage that is available for their class. Group members who accept coverage are enrolled in the policy and are considered the primary member of the policy. Enrolled members are usually referred to as members (for health insurance) or policyholders (for other kinds of insurance).

Primary members can choose products for themselves and for family members or dependents. Usually, different products are available for primary members and for other policy members.

The Group Policies screen allows users to manage group insurance. Specifically, it allows end users to generate proposals, create policies and quotes, add employee classes, design plans, enroll members, and provide service for the policy.

NOTE: In order to generate proposals from the Group Policies screen, you must purchase the Siebel Proposals & Presentations module.

Common Policy Views

Table 4 describes views common to all policy screens.

Table 4. Common Policy Screen Views

View Tab	Description
Summary	Displays a summary of key data associated with a policy in a single view.
Claims	Displays claims recorded for an individual policy.
Proposals	Allows for the creation and retrieval of quotes prepared for a customer associated with an individual quote or policy. Proposals would normally show up in the quote process, but not later.
Underwriting Reports	Allows users to collect and manage underwriting information associated with an application. These reports are sometimes ordered during the application process and sometimes after an application is submitted.
Documents	Allows users to collect and manage documents associated with an application.

For more information on other healthcare policy views, see "Individual Health Policies" on page 119.

Business Scenario

This scenario features sample tasks performed by a licensed sales representative. Your company may follow a different workflow according to its business requirements.

In this scenario, a licensed sales representative for an insurance company is on the phone with an insurance agent. The insurance agent has called on behalf of a prospective customer who wants to offer insurance to its employees at group rates.

In Siebel eHealthcare, the sales representative adds a policy record for the company, which automatically assigns a unique policy number to the company. Then he adds census information for the company, sets up employee classes, and adds a plan design by adding (or configuring) products for the policy. The plan design information and census data can be sent to the insurance company's rating engine to generate a quote for this policy.

Next, he uses a template to generate a proposal, which he then sends to the prospect.

Two weeks later, he receives an email message from the agent indicating that the prospect has called back and will probably purchase a policy, but requires a revised proposal. He selects a static group insurance plan (or creates a dynamic group insurance plan using Siebel eConfigurator) according to the needs of the prospect. Next, he schedules an activity as a reminder to return the call with the revised premium information.

The prospect accepts the revised proposal. Now the sales representative needs to complete the procedures necessary to issue a policy. This includes collecting information about group members and about billing and payment preferences. He follows the procedures implemented by his company to submit the policy for issuance and billing.

Group Policies Sample Tasks

This section details sample tasks often performed by administrators and end users when managing group policy information. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows procedures administrators typically perform to administer group policy information.

- **Add products, product lines, and coverage options.** For more information, see "Adding Products and Product Lines" on page 136.
- **Add rate bands.** For more information, see "Adding Rate Bands" on page 137.
- **Define activity plan templates.** For more information, see "Defining Activity Plan Templates" on page 138.

End-User Procedures

The following list shows tasks end users typically perform when managing group insurance policy information.

- **Add a policy record.** For more information, see "Adding Policy Records" on page 139.
- **Add census information and associate a census with a policy.** For more information, see "Adding Census Information in the Group Policies Screen" on page 140 and "Associating a Census with a Policy" on page 141.
- **Add an employee class.** For more information, see "Adding Employee Classes" on page 142.
- **Create a plan design and reconfigure customization products in a plan design.** For more information, see "Designing Plans for Group Policies" on page 142 and "Reconfiguring Customizable Products in Plan Design" on page 146.
- **Create a proposal.** For more information, see "Generating Proposals" on page 146.

- **Collect and manage underwriting information.** For more information, see "Managing Underwriting Information" on page 147.
- **Add an eligible member.** For more information, see "Adding Eligible Members" on page 148.
- **Enroll a member.** For more information, see "Enrolling Members" on page 148.
- **Add a beneficiary.** For more information, see "Adding Beneficiaries" on page 150.
- **Set up a payment plan.** For more information, see "Setting Up Payment Plans" on page 150.

Administrator Procedures

The following administrator procedures are described in this section:

- To add a group insurance product
- To add a rate band on page 137
- To create an activity plan template on page 138
- To create activities for the template on page 138

NOTE: Only those with Siebel administrator responsibilities can change entries in the Insurance Administration and Product Administration screens.

Adding Products and Product Lines

As an administrator, you can add products to the Siebel database. This section describes the procedure for setting up products and product lines in general terms.

You can also specify that a product line is one that your company contracts agencies to sell, or that the state licenses agencies to sell, or both.

To add a group insurance product

1. Set up the product class structure, including product class attributes.

   For more information about adding product classes, see *Siebel Applications Administration Guide*.

2. Add the products in the Product Administration screen and associate them with the appropriate class.
3. In the Category field in the Products form, select Group Insurance.
4. Include the product in a product line.

5 Specify a product line type:

   a From the application-level menu, choose View > Site Map > Application Administration > Product Lines.

   b In the Product Line list, select one or both of the following fields:

      - **Contracting.** To specify that the product line is one that your company contracts agencies to sell. This product line will appear to end users as a choice in the Lines of Business dialog box in the Partners, Contracts view tab.

      - **Licensing.** To specify that the product line is one that agencies can be granted a state license to sell. This product line will appear to end users as a choice in the Lines of Business dialog box in the Partners, Licenses & Appointments view tab.

   A check box appears in the middle of the field.

   c Click in a blank check box to select the product line type or click the X in a check box to clear it.

   For more information about adding products and product lines, see *Product Administration Guide*.

6 Set up the Customization Product by defining configuration rules and specifying the user interface.

   For more information, see the section on creating customizable products in *Product Administration Guide*.

Adding Rate Bands

After you add a product in the Product Administration screen, you can use the Insurance Administration screen to associate a rate band with a product. A rate band is pricing information about the deductible, the premium, and the payroll deduction for each insurance product.

To add a rate band

1 From the application-level menu, choose View > Site Map > Insurance Administration > Health and Group Products.

2 In the Products list, select a product.

3 In the Rate Bands list, add a record and complete the necessary fields.

Defining Activity Plan Templates

Activity Plan Templates allow you to create and manage activities related to group policies. You define templates using the Application Administration screen Activity Templates and Activity Template Details views.

To create an activity plan template

1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.

2 In the Activity Plan Templates list, add a record.

3 In the Name field, type a name for the template.

4 In the Type field, choose FINS Group Policy.

5 Complete the remaining necessary fields.

For more information, see *Siebel Applications Administration Guide*.

To create activities for the template

1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.

2 In the Activity Plan Templates list, select a template.

3 Click the Activity Template Details view tab.

4 In the Activity Template Details list, add a record.

5 Complete the necessary fields for each activity assigned to the template.

6 From the drop-down list, choose an activity type.

NOTE: Repeat Step 2 through Step 6 to add activities to the template.

7 Save the activity.

End-User Procedures

The following end-user procedures are described in this section:

- To add a policy record on page 139
- To add census information on page 140
- To associate a census with a policy on page 141
- To add an employee class on page 142
- To add a plan design on page 143
- To dynamically reconfigure customizable products in plan design on page 146
- To generate a proposal on page 146
- To add underwriting information on page 147
- To view historical underwriting information on page 147
- To add an eligible member on page 148
- To enroll a member on page 149
- To add a beneficiary on page 150
- To set up a payment plan for a group policy on page 150

Adding Policy Records

Adding a group policy record is the first step in generating a policy proposal or issuing a group policy. After end users add a policy record, they must set up employee classes, add a policy plan design, and generate a policy proposal. If the customer accepts the proposal, they add eligible members, enroll members who elect coverage under the plan, and set up policy payment plans.

To add a policy record

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, add a record and complete the necessary fields.

Adding Census Information in the Group Policies Screen

End users can add census information for companies that request a quote or proposal for a group insurance policy. To add census information, end users must:

- Add a policy in the Group Policies screen
- Add census information using the instructions in the "To add census information" procedure
- Associate the census with the policy

NOTE: After users add the census information, they can associate the census with the policy. For more information, see "Associating a Census with a Policy" on page 141.

To add census information

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Census view tab.
4. In the Census list, from the Show drop-down list, select Segmented Census or Detailed Census.
   - **Segmented Census.** Allows you to add information for groups of employees.
   - **Detailed Census.** Allows you to add information for individual employees.

   NOTE: Usually, you will add detailed or segmented information for a single census. However, you can add information for both.

   ---

5. In the Census list, add a record and complete the necessary fields.
6. If you selected Segmented Census:
   - Scroll down to the Employee Count list.
   - In the Employee Count list, add a record and complete the necessary fields.

7 If you selected Detailed Census:

- Scroll down to the Employee List list.
- In the Employee List list, add a record and complete the necessary fields.

To add attachments associated with a group policy

1. Navigate to the Group Policies screen.
2. Click the Attachments view tab.
3. In the Attachments list, add a record.
4. In the Attachment Name field, click the select button.
5. In the Add Attachment dialog box, do one of the following:
   - Click Browse, and select the file to be added as an attachment.
   - In the URL field, type a URL to the file to be added as an attachment.
6. Click Add.

Associating a Census with a Policy

After end users add the census information, they can associate the census with the policy.

To associate a census with a policy

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. In the Policy Census field of the Policies/Quotes form, click the select button.

   NOTE: If this field does not display, click the menu button and choose Columns Displayed. After you move Policy Census to the Selected Columns list and click Save, the Policy Census field will appear.

   The Pick Group Census dialog box appears, showing each census available for that policy.

4 In the Pick Group Census dialog box, select a census and click OK.

Adding Employee Classes

Some group policies, especially those for larger groups, offer different products to different employee classes of group members. Examples of employee classes are salaried employees and hourly employees. Each employee class offers a unique combination of products, product options, and product rates. Users can use the Classes view to add or make changes to employee classes.

To add an employee class

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Classes view tab.
4. In the Classes list, add a record and complete the necessary fields.

Designing Plans for Group Policies

End users can design plans for group polices by adding information about products, product classes, and rate bands. A rate band is pricing information about the deductible, the premium, and the payroll deduction for each insurance product. The following lists are available in the Plan Design view:

- **Product Attributes.** This view contains the Plan Design Product list and the Attributes list. Use the Plan Design Product list to associate a product with the policy that appears in the Group Policy form. Use the Attributes list to view attribute information and change attribute values.
- **Product Classes.** This view contains the Plan Design Product list and the Classes list. Use the Classes list to select employee classes that you want to associate with the selected product.
- **Product Class Matrix.** This view contains the Plan Design Product Class Matrix list. In this list, you associate an employee class with the selected product.
- **Product Class Rate Bands.** This view contains the Plan Design Product Class Rate Band list. Use this list to associate a rate band with the selected product/class.

To add a plan design

1. From the application-level menu, choose View > Site Map > Group Policies > My Policies/Quotes.
2. In the Policies/Quotes list, select a group policy and click the Plan Design view tab.

   The Plan Design Products list appears, showing the selected policy.

   NOTE: If you need to add a product, in the Plan Design Products list, click New and complete the fields.

   ---

3. From the Show drop-down list, select Product Attributes and scroll down to the Attributes list.
4. In the Attributes list, change the appropriate information.
5. From the Show drop-down list, select Product Classes and scroll down to the Classes list.
   a. In the Classes list, click New to associate an employee class with the selected product.
   b. In the Class Name field, click the select button.
   c. In the Pick Class dialog box, select an employee class from the Class Name field and click OK.

   NOTE: Only employee classes available for the selected product appear in the Pick Class dialog box. You can add employee classes to the list in this dialog box by using "Adding Employee Classes" on page 142.

   ---

6. From the Show drop-down list, select Product Class Matrix.

  a In the Product Class Matrix list, click the appropriate product column for each class.

  A check mark appears to indicate your selection.

  NOTE: To delete a check mark, click it.

7 From the Show drop-down list, select Product Class Rate Bands.

  a In the Product Class list, select a record with the appropriate product and class and scroll down to the Rate Bands list.

  b In the Rate Bands list, click New to associate a rate band with the selected product and class.

  c In the Rate Bands field, click the select button.

  d In the Pick Product Rate Bands dialog box, select a Rate Band and click OK.

NOTE: Only available rate bands for the selected product appear in the Pick Product Rate Bands dialog box. Rate Bands are created in the Insurance Administration > Health and Group Products view. For more information about how to add Rate Bands, see "Adding Rate Bands" on page 137.

NOTE: To generate a proposal for this plan, see "Generating Proposals" on page 146.

How Enrollment Waiting Periods Impact the Start of Coverage

You can control how Siebel eHealthcare calculates the start of coverage by defining the enrollment waiting period in the Group Policies screen. When you add a Plan Design, you define Product Classes that you then associate with a specific product. In the Classes list you can specify the Waiting Period, that is the number of days that must pass prior to the start of coverage. The actual start of coverage appears in the Effective Date field in the Group Policies, Enrollment view. The Waiting Period you specify in the Plan Design, Classes list directly impacts this Effective Date.

By default, Siebel eHealthcare has the following defined rules:

- If a Waiting Period is specified, the Effective Date is set to the number of waiting days from today's date.
- If a Waiting Period is not specified, the application checks today's date. If that date is before the 15th of the month, the Effective Date is set to the first of the month. If that date is after the 15th of the month, the Effective Date is set to the first of the following month.

When a user enrolls a new member in the Group Policy, Enrollment view, the Effective Date field defaults to a value based on these two rules and the application sets the Status field to Waiting.

The FINS Member Enrollment Rules Workflow enforces these rules. Users can invoke this workflow by submitting a Repeating Component Request that repeats every 24 hours in batch mode. It will check the Effective Date of existing enrollment records and update the Status from Waiting to Active if:

- The Effective Date of a record is less than or equal to today's date
- The Status is still set to Waiting

For more information, see *Siebel Server Administration Guide*.

To view the FINS Group Policy Member Benefits business component

1. In Siebel Tools, lock the appropriate project.
2. In the Object Explorer, click the Business Component folder to expand the hierarchical tree.
3. Search for FINS Group Policy Member Benefits.
4. In the Object Explorer, click the Fields folder.
5. Locate the following fields:
   - **Effective Date Cal.** This field calculates the Waiting Period.
   - **Effective Date Cal Date.** This field determines when coverage begins based on the values in Effective Date Cal field.

For more information, see *Developing and Deploying Siebel eBusiness Applications* and *Siebel Tools Reference*.

Reconfiguring Customizable Products in Plan Design

End users can dynamically reconfigure customizable products by using the ReConfig button in the Product Attributes list. The ReConfig button is only available if Siebel eConfigurator was installed and the selected product was created as a customizable product in Siebel eConfigurator. For more information, see the chapters about customizable products in the *Product Administration Guide*.

To dynamically reconfigure customizable products in plan design

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a group policy.
3. Click the Plan Design view tab.
4. In the Product Attributes list, click ReConfig.

   A configuration session launches and a selection page appears. For information about customizable product selection pages, see *Product Administration Guide*.

Generating Proposals

A proposal is a written quote for a policy. Before generating a proposal, end users must add the policy, set up classes, and add the policy plan design. Usually, the last step in adding the plan design is to activate the software program your company uses to rate policies. For more information, see "Designing Plans for Group Policies" on page 142.

To generate a proposal

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Proposals view tab.
4. In the Proposals list, add a record.
5. In the new record, select the appropriate template and complete the contact information and the remaining fields.
6. Click Generate Draft.

Managing Underwriting Information

End users can use the Underwriting and Underwriting Reports view tabs on the Group Policies screen to collect and manage underwriting information.

To add underwriting information

1. Navigate to the Group Policies screen.
2. Click the Underwriting Reports view tab.
3. In the Underwriting Reports list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Type	Type of underwriting report or information being requested.
Status	Status of the current report. Valid options include: ■ Requested ■ Received ■ Submitted
Ordered	Date automatically generated by the application when a new record is created.
Received	Date the underwriting report was received.
Attachments	The document containing the requested information. To add an attachment: 1 Click the select button. 2 In the Add Attachment dialog box, select the file or type the URL linking to the appropriate file. 3 Click Add. Once a file is attached, users can drill down on the attachment hyperlink to view the attached document.

To view historical underwriting information

1. Navigate to the Group Policies screen.

2. Click the Underwriting view tab.
3. From the Show drop-down list in the Underwriting list, select a type of underwriting information:
   - Rates
   - Prior Insurance History
   - Premium/Claim History
   - Large Claimant History

Adding Eligible Members

After a customer accepts a group policy plan, end users can add or make changes to eligible members. Eligible members can accept or decline group policy coverages. Members who accept coverage can be enrolled in the plan.

To add an eligible member

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Eligible Members view tab.
4. In the Primary Members list, add a record.
5. In the Add Members dialog box, select an existing record, or add a record and complete the necessary fields.

NOTE: During implementation, you will import the eligible members from the final census.

Enrolling Members

Group members who accept coverage are enrolled in the policy and are considered the primary member of the policy. End users use the Enrollment view to enroll eligible members, including the primary member and dependents, who accept coverage in the plan.

To enroll a member

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Enrollment view tab.
4. In the Primary Members list, select the primary member whom you want to enroll and scroll down to the Member Products list.
   - **a** In the Member Products list, add a record and complete the necessary fields.
   - **b** Repeat Step 4 for each product you would like to add for this primary member.

   All the products related to this primary member's enrollment are added.
5. Scroll down to the Insured Members list.
   - **a** In the Insured Members list, click New to enroll the primary member and the dependents.
   - **b** In the Last Name field, click the select button.
   - **c** In the Pick Contacts dialog box, select the primary member that you would like to associate with the selected product and click OK.
   - **d** In the Insured Members list, complete the remaining fields.

   NOTE: Add dependent members in the Pick Contacts dialog box by clicking on the New button and completing the fields.
6. Repeat Step 4 and Step 5 for each member you would like to enroll.

When you finish, all enrolled members, including the primary member, appear in the Insured Members list.

Adding Beneficiaries

Some group policies, such as group life insurance policies, require that members designate one or more policy beneficiaries. End users can use the Member Beneficiary view to add or make changes to group policy beneficiaries.

To add a beneficiary

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Member Beneficiary view tab.
4. In the Member Life Products list, select a primary member record.
5. Scroll down to the Insured Members list and select a member for whom you would like to add a beneficiary.
6. In the Beneficiary list, add a record and complete the necessary fields.

Setting Up Payment Plans

End users can set up payment plans, including details about payment methods, for group insurance policies.

To set up a payment plan for a group policy

1. Navigate to the Group Policies screen.
2. In the Policies/Quotes list, select a policy.
3. Click the Bill To view tab.
4. In the Pay Plans list, add a record and complete the necessary fields.
5. Scroll down to the Bill To Address form.
6. In the Last Name field, click the select button.
7. In the Pick Contact dialog box, select a name and click OK.

Members 11

Members are individuals who are insured by an organization. In some cases, members are also known as policyholders, subscribers, or insureds.

The Members screen allows user to manage insurance policy members. It allows end users to add and track information about members with whom they do business, such as enrolling them in health programs; changing a member's member's primary care provider, primary network, or independent practice association (IPA); or adding service requests or activities for members.

Business Scenario

This scenario features sample tasks performed by a call center representative. Your company may follow a different workflow according to its business requirements.

In this scenario, a call center representative for a health plan or an insurance company is handling multiple calls each day from insurance agents and members.

Typically, members call to ask questions regarding their insurance coverage. The call center representative accesses this information in the Members screen, Summary view. To enroll members in a health program, she uses the Health Programs view. To handle a request for a change of primary care provider (PCP) or a primary network or independent practice association (IPA), she goes to the Benefits view. To look at the member's provider history, she uses the Primary Care Provider History view.

NOTE: Do not add member records in the Members screen. Use the Group Policies screen or the Individual Health Policies screen to add member records. For more information, see "Individual Health Policies" on page 119 or "Group Policies" on page 131.

Members often call to request information about providers. After the representative adds provider records in the Providers screen, she can view them in both the Providers screen and the Members screen. In the Members screen, a check mark appears in the Provider field of the record, indicating that the member is a provider.

NOTE: Do not add healthcare provider records in the Members screen. Use the Providers screen to add provider records. For more information, see "Providers" on page 173.

In this scenario, end users are the call center representatives. They enter information to:

- Enroll a member in a health program
- Charge a PCP, primary network, or IPA for members
- Add additional benefits coverage

Members Sample Tasks

Figure 6 illustrates sample tasks that end users typically perform when managing members.

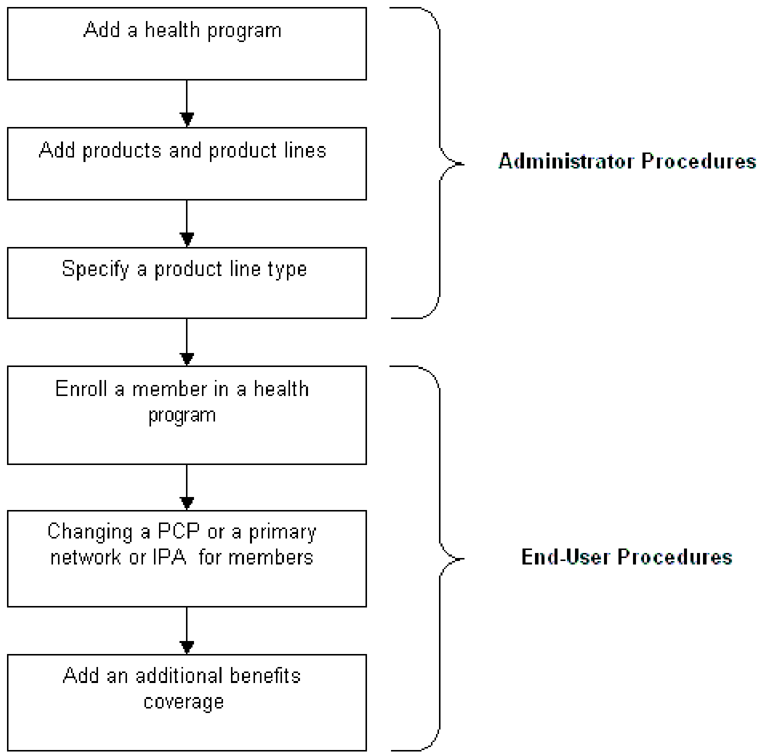

Figure 6. Members Sample Tasks

Administrator Procedures

The following administrator procedure is described in this section:

- To add a health program

NOTE: Only those with the required administrative responsibilities, such as Siebel administrators, can change entries in the Insurance Administration screen.

Adding Health Programs

Health programs are medical programs designed to maintain a member's health or to prevent disease. Health programs include those that offer maternity care or infant care, diet and exercise programs, and chronic-illness management programs. You can add health programs.

To add a health program

1. From the application-level menu, choose Site Map > Insurance Administration > Health Programs.
2. In the Health Programs list, add a record and complete the necessary fields.

End-User Procedures

The following end-user procedures are described in this section:

- To enroll a member in a health program
- To make changes to member information on page 155
- To add an additional benefits coverage on page 156

Enrolling Members in Health Programs

Health Programs are medical programs designed to maintain a member's health or to prevent disease. Health programs include those that offer maternity care or infant care, diet and exercise programs, and chronic-illness management programs. After you add a member, you can enroll the member in a health program.

To enroll a member in a health program

1. Navigate to the Members screen.
2. In the Members list, select the member whom you would like to enroll in a health program.
3. Click the Health Programs view tab.
4. In the Health Programs list, add a record and complete the necessary fields.

Changing a PCP or a Primary Network or IPA for Members

If a member changes primary care provider (PCP), primary network, or independent practice association (IPA), end users can update Siebel eHealthcare to reflect the change.

To make changes to member information

1. Navigate to the Members screen.
2. In the Members list, select a member.
3. Click the Benefits view tab.

4 In the Benefits list, select the appropriate field and enter the new information as follows:

- **Primary Care Provider Last Name.** Select a new primary care physician.
- **Primary Network/IPA.** Select a new primary network or IPA.

Adding a Member's Additional Benefits Coverage

Additional benefits are called coordination of benefits. Two examples are:

- When the spouse of a member has the same coverage as the member.
- When a member has medicare as secondary coverage.

To add an additional benefits coverage

1. Navigate to the Members screen.
2. In the Members list, select a member.
3. Click the Coordination of Benefits view tab.
4. In the Coordination of Benefits list, add a record.
5. In the Add Coordination of Benefits dialog box, perform the appropriate task:
   - Select a record and click OK.
   - Click New to add a new record.
6. In the Coordination of Benefits list, complete the necessary fields.

Partners and Agents 12

Siebel eHealthcare allows you to manage partners and agencies. *Partners* include service providers, aggregators, and insurance agencies. *Agencies* are organizations that act on behalf of insurance companies to sell insurance policies. Agents and brokers are the licensed sales representatives who sell the insurance policies. For many insurance companies, agencies are often the most important type of partner.

Tracking partner information is important since for many healthcare companies, partners such as banks, agencies, and brokerages often function as a primary revenue channel.

NOTE: Adding partners on the Partner screen only allows you to track and monitor partner information. If you want to share data with a partner, the partner should be upgraded to a Siebel Organization. To perform this and other Partner administration tasks, you use the Partners Administration screen. For more information, see *Siebel Partner Relationship Management Administration Guide*.

End users use the Agents screen for healthcare-related procedures such as:

- Adding agents
- Viewing agent information
- Creating service requests or activities for agents
- Tracking information about contracts, licenses, appointments, registration, errors and omissions, policies, and quotes

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NOTE: Under the Party Model, where contacts include all persons, individuals added in the Agents business component are also members of the Contacts business component. Agents are a special subset of contacts who are engaged in the sales of Financial Services products.

Business Scenario

These scenarios feature sample tasks performed by a health plan company employees. Your company may follow a different workflow according to its business requirements.

In these scenarios, the end users are company employees who manage information in the field. They enter information to:

- Create a partner
- Add a contact that represents an agency
- Add new agents
- View information about existing agents
- Track agent information about contracts, licenses, appointments, registration status, errors and omissions, policies, and quotes
- Create service requests or activities for agents

Employee Adds a New Agency

In this scenario, an insurance company uses independent agencies as one of the channels for distribution of its insurance products. An employee for this insurance company needs to add a newly appointed agency to represent his company's products to consumers.

His company has verified the qualifications of the agency, so he adds information about the agent. Then, he adds a new Partners record and adds information about the agency's errors and omissions coverage.

Next, he navigates to the License & Appointments view to record information about the agency's license. Finally, he adds a contact with the agency.

Company Signs New Agent

An healthcare company signs a new agent. A licensing and contracting coordinator for the company receives an interoffice mail containing the required paperwork. She enters the agent's contact, license, appointment, and contract information into Siebel eHealthcare.

Six months later, the agent moves to a new office. He forwards his new address and phone number to the sales representative who is his main contact at the healthcare company. The sales representative locates the agent in Siebel eHealthcare and updates his address and phone number.

Partners Sample Tasks

Figure 7 illustrates sample tasks that end users typically perform when managing partners and agents.

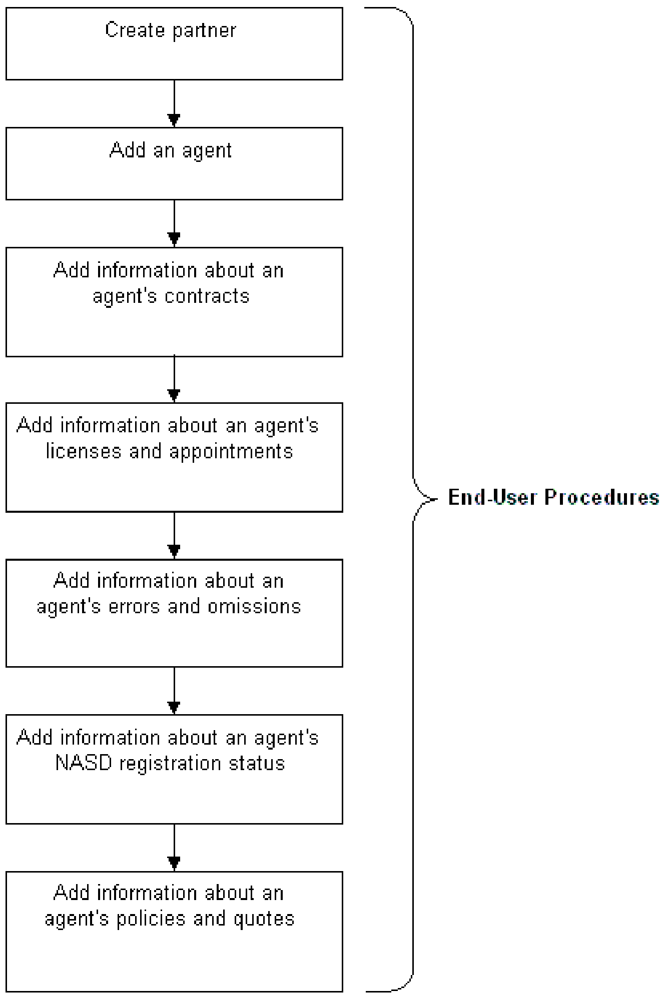

Figure 7. Partners and Agents Sample Tasks

End-User Procedures

The following end-user procedures are described in this section:

- To create a partner
- To add an agent on page 161
- To add additional information about an agent on page 163

Adding New Partners

End users can create new partner records and make changes to existing service provider information.

To create a partner

1. Navigate to the Partners screen.
2. In the Partners form, click the show more button, add a record, and complete the necessary fields.
3. In the Partner Type field, select the appropriate type. If this partner is a service provider, select Service Provider.

Adding an Agent

Agents are the licensed sales representatives who sell insurance policies. Adding an agent is the first step in managing procedures related to the agent.

To add an agent

1. Navigate to the Agents screen.
2. In the Agents list, add a record and complete the necessary fields.
   a. In the Partner field, click the select button.
   b. In the Partners dialog box, select a record and click OK, or click New to add a new partner.

c If adding a new partner, complete the fields.

NOTE: Records in the Agents list contain a few of the most frequently-used Agents' fields. You can add text into additional fields, such as email address, in the More Info form. In addition, you can add or change the columns displayed in the list, by clicking the list's menu button and choosing Columns Displayed.

Adding Information Associated with a Agent

Using the view tabs on the Agents screen, you can track additional information related to agents including information about contracts, licenses and appointments, errors and omissions, National Association of Securities Dealers (NASD) registration, and policies and quotes.

To add additional information about an agent

1. Navigate to the Agents screen.
2. In the Agents list, select an agent and click the appropriate view tab from the following list:
   - **Contracts.** To add information about the agent's contracts.
   - **Licenses and Appointments.** To add information about licenses the agent holds.
   - **Errors and Omissions.** To add information about the agent's errors and omissions.
   - **Registration.** To add information about the agent's registration status.
   - **Policies/Quotes.** To view policies and quotes for the agent you selected.
3. In the selected view list, add a record and complete the necessary fields.

Referrals and Authorization 13

Siebel eHealthcare allows you to track referrals to other providers and authorizations of specific healthcare services. Service agents use the Referrals\Authorizations screen to collect the information required for referral and authorization approval, validate the fields, initiate workflow, and track the status on behalf of a provider, member, or other inquiring party. This information can then be integrated with back office systems using a prebuilt referral and authorization ASI. For more information, see "Integration" on page 191.

Business Scenario

The following business scenario features sample tasks performed by a call center representative for health plan company. Your company may follow a different workflow according to its business requirements.

A healthcare provider calls a health plan's call center in order to refer a patient to an orthopedic surgeon. A call center representative receives the call from the provider. The call center representative first authenticates the provider and then looks up the member on the Members screen. By looking at the Member Summary view, she verifies the member's basic eligibility and coverages. She then navigates to the Referrals/Authorizations screen. She creates a new referral and completes the necessary fields. Once she finishes entering the necessary data, she changes the value in the Status field to Open and sets the Sub-status field to Submitted.

Referrals and Authorization Sample Tasks

This section details sample tasks often performed by administrators and end users when managing referral and authorization approval information. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows procedures administrators typically perform to administer referrals and authorizations.

- **Create activity plan templates.** For more information, see "To create an activity plan template" on page 168.
- **Create activities for an activity plan template.** For more information, see "To create activities for the template" on page 168.

End-User Procedures

The following list shows tasks end users typically perform when creating referrals and authorizations.

- **Create a referral or authorization.** For more information, see "To create a referral or authorization" on page 169.
- **Record actions related to referrals or authorizations.** For more information, see "To record referral or authorization actions" on page 170.
- **Associate a referral or authorization with a provider, department, clinic, drug, lab, test, or type of medical equipment.** For more information, see "To record referral or authorization decisions" on page 171.
- **Add attachments related to referrals or authorizations.** For more information, see "To add attachments related to referrals and authorizations" on page 172.

Administrator Procedures

The following administrator procedures are described in this section:

- To create an activity plan template
- To create activities for the template

Activity Plan Templates allow you to create and manage activities related to referrals and authorizations. You define templates using the Application Administration screen's Activity Templates and Activity Template Details views.

To create an activity plan template

1. From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
2. In the Activity Plan Templates list, add a record.
3. In the Name field, type a name for the template.
4. In the Type field, choose FINS Referrals Authorizations.
5. Complete the remaining necessary fields.

For more information, see *Applications Administration Guide*.

To create activities for the template

1. From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
2. In the Activity Plan Templates list, select a template.
3. Click the Activity Template Details view tab.
4. In the Activity Template Details list, add a record.
5. Complete the necessary fields for each activity assigned to the template.
6. From the drop-down list, choose an activity type.

NOTE: Repeat Step 2 through Step 6 to add activities to the template.

---

7. Save the activity.

End-User Procedures

The following end-user procedures are described in this section:

- To create a referral or authorization
- To record referral or authorization actions on page 170
- To record referral or authorization decisions on page 171
- To add attachments related to referrals and authorizations on page 172

Managing Referrals or Authorizations

End users use the Referrals/Authorization view to record the necessary information for processing a referral or authorization. Using the Referrals/Authorization form and More Info view tab, users can verify they have recorded all the required information, check on member eligibility, and track the status of referrals and authorizations.

To create a referral or authorization

1. Navigate to the Referrals/Authorization screen.
2. In the More Info form, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Referral/ Authorization #	Automatically generated by the application.
Type	Determines whether the record is a referral or authorization.
Last Name	Last name of the member. The application automatically populates the First Name field. For more information on adding members, see "Adding Eligible Members" on page 148.

Field	Comments
Status	Status of this referral or authorization. Valid options include: ■ Open ■ Pending ■ Closed ■ Cancelled ■ Exception Handling
Requestor Last Name	Last name of provider. The application automatically populates the Requestor First Name field. For more information on adding providers, see "Adding Providers" on page 178.
Diagnosis Codes	Diagnosis code for this referral or authorization. For more information on adding codes, see the discussion on modifying the List of Values (LOV) in *Applications Administration Guide*.
Maximum Visit #	Maximum number of visits for this referral or authorization.
Procedure Codes	Procedure code for this referral or authorization. For more information on adding codes, see the discussion on modifying the List of Values (LOV) in *Applications Administration Guide*.
Benefits Amount	The maximum dollar amount for the specified benefit.

End users can use the Actions view tab to record activities related to a referral or authorization. For more information on creating activity plan templates, see "To create an activity plan template" on page 168.

To record referral or authorization actions

1. Navigate to the Referrals/Authorization screen.
2. Click the Actions view tab.
3. In the Actions list, add a new record and complete the necessary fields.

4 To add a new activity, add a new record in the Activities list and complete the necessary fields.

End users can use the Decision History view tab to associate a referral or authorization with a provider, department, clinic, drug, lab, test or medical supplies.

To record referral or authorization decisions

1 Navigate to the Referrals/Authorization screen.

2 Click the Decision History view tab.

3 In the Approved Actions form, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	The type of referral or authorization decision. Valid options include: ■ **Lab** - Lab referral or authorization. ■ **Test** - Medical test referral or authorization. ■ **DME** - Authorization for durable medical equipment, for example, wheelchair. ■ **Rx** - Specified drug treatment.
Description	Description of this referral or authorization.
Equipment #	Equipment identification number.
Rx Drug	The specific drug treatment requested by the provider. If the provider requests a unauthorized drug, then they must indicate the quantity, dosage, and expected treatment before submitting the request.
Rx Dosage	The specific dosage of the requested drug treatment. If the provider requests a unauthorized drug, then they must indicate the quantity, dosage, and expected treatment before submitting the request.

4. In the Approved Providers and Facilities list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Provider Last Name	Last name of the provider. The application automatically populates the Provider First Name and ID#. For more information on adding providers, see "Adding Providers" on page 178.
First Name	First name of the member. For more information on adding members, see "Enrolling Members in Health Programs" on page 155.
Facility	The facility where the treatment will be performed. The application automatically populates the remaining fields. For more information on adding facilities, see "Adding Facilities" on page 115.

To add attachments related to referrals and authorizations

1. Navigate to the Referrals/Authorization screen.
2. Click the Attachments view tab.
3. In the Attachments list, add a record.
4. In the Attachment Name field, click the select button.
5. In the Add Attachment dialog box, do one of the following:
   - Click Browse, and select the file to be added as an attachment.
   - In the URL field, type a URL to the file to be added as an attachment.
6. Click Add.

   The remaining fields are automatically updated using the selected file's properties.

Providers 14

Providers are healthcare professionals who are paid by, or file claims with, your health plan or health insurance company. Examples of providers are physicians, nurse practitioners, dentists, and pharmacists.

The Providers screen allows end users to manage information about providers. Specifically, it allows end users to add and track information about providers and contracts, locate providers, associate facilities with a provider, indicate a provider's specialties, add profile information (such as provider skills, background, and business locations and hours), add some provider claims (such as, an out-of-service-area claim), view payment information, and print a Provider report.

Business Scenario

This scenario features sample tasks performed by a contracting specialist, a provider relations representative, and a member service representative. Your company may follow a different workflow according to its business requirements.

In this scenario, a contracting specialist for a health plan is responsible for managing information about the healthcare providers with which her company does business. She just established a contract with a single provider.

She adds the new provider and then adds information about the provider's area of specialization. Next, she adds information about the provider's primary location (for example, a medical group or pharmacy), affiliations (such as hospitals or health networks), and whether or not hospital affiliations include admitting privileges. After that, she adds information about the provider's skills, background, and clinic locations and hours. Then she adds information about contracts the provider holds with her company and adds the provider's payment preferences.

A provider relations representative provides service for the provider. He uses the:

- Encounters view and the Claims view to refer to reports regarding patient visits and claims
- Payments view to refer to payments made to the provider
- Service Requests view to add service requests such as referral inquiries
- Alerts view to add important notes about this provider

A member service representative uses Siebel eHealthcare to answer questions about contracted providers. Using the Provider Locator, she searches for providers by city, state, or ZIP Code. She views and prints Provider reports based on the product and speciality. Also, she can view some of the information the contracting specialist adds in the Providers screen and the Products screen. For example, the Products screen displays information about providers in the Primary Providers view and the Contracted Providers view.

In this scenario, end users are health plan contracting specialists, provider relations representatives, and member service representatives. They use Siebel eHealthcare to:

- Add a new providers and provider addresses

- Associate a facility with a provider
- Associate a specialty with a provider and add profile information
- Add a provider contract
- View provider payments
- Add a provider claim
- View and print provider reports

Providers Sample Tasks

Figure 8 illustrates sample tasks that end users typically perform when managing providers.

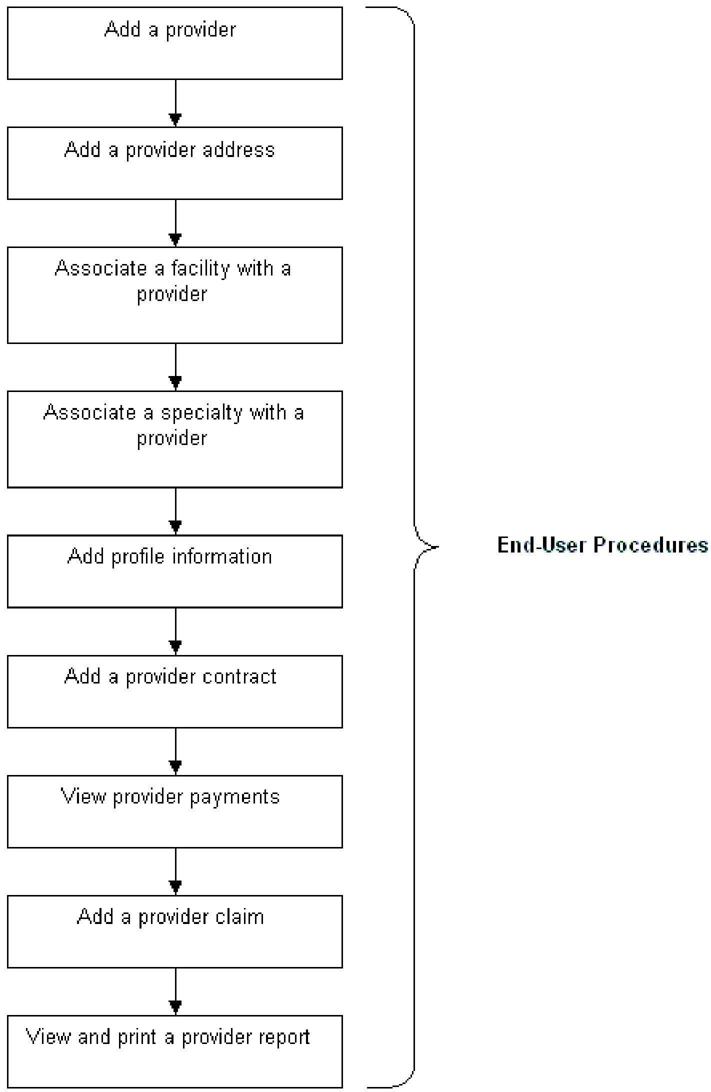

Figure 8. Providers Sample Tasks

End-User Procedures

The following end-user procedures are described in this section:

- To add a provider
- To add a provider address on page 179
- To associate a facility with a provider on page 179
- To associate a specialty with a provider on page 180
- To add profile information on page 181
- To add a provider contract on page 181
- To view a provider payment on page 182
- To add payments manually on page 182
- To add a provider claim on page 183
- To view a report on page 183

Adding Providers

End users use the Providers screen to add or make changes to healthcare provider records. After they add provider records in the Providers screen, users can view them in the Providers and the Contacts screen. In the Contacts screen, a check mark appears in the Provider field of the record, indicating that the contact is a provider.

NOTE: End users can add healthcare provider records in the Contacts screen. However, they will not appear in the Providers screen unless they check the Providers check box on the More Info view tab.

To add a provider

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. In the Providers list, add a record and complete the necessary fields.

Adding Addresses for the Provider Locator

Users must add provider addresses if they want to use the Provider Locator feature.

To add a provider address

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. In the Providers list, select a provider and click the Addresses view tab.
4. In the Addresses list, add a record.
5. In the Add Address dialog box, perform the appropriate task:
   - To choose an existing record, select a record and click OK.
   - To add a new record, click New and complete the fields.
6. In the Addresses list, click Update Geo Code.

NOTE: The latitude and longitude values will not generate if any one value in the City, State, Zip Code, or Country fields is incorrect. For example, if the ZIP Code is incorrect, you will receive an error message. To correct this problem, navigate to the Application Administration, ZIP Code Administration view and make sure the Geo values for that city, state, and ZIP Code combination has been loaded. For more information, see *Siebel eService Administration Guide*.

Associating Facilities with Providers

A provider may be affiliated with one or more facilities. For example, a provider may work at both a clinic and a hospital. End users can use the Affiliations view to associate facilities, such as clinics, hospitals, or pharmacies, with providers.

To associate a facility with a provider

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. In the Providers list, select a provider.

4 Click the Affiliations view tab.

5 In the Affiliations list, add a new record.

6 In the Facilities dialog box, perform the appropriate task:

- To choose an existing record, select a record and click OK.
- To add a new record, click New and complete the fields.

Associating Specialties with Providers

Many providers have an area of medical specialization. End users can use the Specialties view to indicate a provider's area of medical specialization by associating specialities with providers.

To associate a specialty with a provider

1 Navigate to the Providers screen.

2 From the Show drop-down list, select My Providers.

3 In the Providers list, select a provider.

4 Click the Specialties view tab.

5 In the Specialties list, add a record and complete the necessary fields.

NOTE: To add a new Specialty, you must add a new value to the List of Values (LOV) by specifying the Type as FINS_AGDESG_HLTHSPEC_MLOV. For more information, see *Applications Administration Guide*.

Adding Profile Information

End users can use the Profile view to add profile information for providers. Profile information includes provider skills, background, business hours, and business locations.

To add profile information

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. In the Providers list, select a provider.
4. Click the Profile view tab.
5. In the Skills and Background form, complete the necessary fields.
6. Scroll down to the Hours & Locations list.
7. In the Hours & Locations list, add a record and complete the necessary fields.

Adding Provider Contracts

A company may have one or more contracts with each provider with whom they do business. Each contract may have different terms, payment preferences, and payment methods. End users can use the Contracts view to add contracts with providers.

End users can set up different payment arrangements and methods for each provider contract.

To add a provider contract

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. In the Providers list, select a provider.
4. Click the Contracts view tab.

5 In the Contracts list, add a record and complete the necessary fields.

   The contract is added for the provider.

6 Scroll down to the Payment Preferences form.

7 In the Payment Preferences form, from the drop-down list, select one of the following:

   - **Payment Preferences - Check.** To pay using a check.
   - **Payment Preferences - EFT.** To pay using an electronic funds transfer.

8 In the selected Payment Preferences form, complete the necessary fields.

Viewing Provider Payments and Adding Payments Manually

End users can use the Payments view to review information about payments their company makes to providers. Payment information can include payment amount, payment date, payment adjustments, and reason for payment.

To view a provider payment

1 Navigate to the Providers screen.

2 From the Show drop-down list, select My Providers.

3 In the Providers list, select a provider.

4 Click the Payments view tab.

Provider payments are usually imported from an external billing system. You can add payments manually in the Providers list.

To add payments manually

1 Navigate to the Providers screen.

2 From the Show drop-down list, select My Providers.

3 In the Providers list, select a provider.

4 Click the Payments view tab.

5 In the Payments list, add a record and complete the necessary fields.

NOTE: You can scroll down to the Payment Details form to see additional fields.

Adding Provider Claims

A contract with a provider may specify that the provider is paid for each member visit or service. If so, providers or members may contact your company to initiate claims for payment. End users can use the Claims view to add claims for providers.

To add a provider claim

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. In the Providers list, select a provider.
4. Click the Claims view tab.
5. In the Claims list, add a record.
6. In the Add Claims dialog box, perform the appropriate task:
   - To choose an existing record, select a record and click OK.
   - To add a new record, click New and complete the fields.

   NOTE: You can scroll down to the Claims form and complete additional fields.

Viewing and Printing a Provider Report

Provider reports can be viewed and printed by product and speciality.

To view a report

1. Navigate to the Providers screen.
2. From the Show drop-down list, select My Providers.
3. From the application-level menu, choose View > Reports.

4 In the Providers dialog box, in the Select a Report drop-down list, select one of the following and click Run:

- **Provider by Speciality.** Lists all the providers and their general information, sorted by their specialities (such as dermatology and pediatrics)
- **Provider by Product.** Lists all the providers with general information in the order of products (such as HMO Plus and PPO) with which they are contracted.

The Provider report appears in the Siebel Report Viewer.

5 To print the report, in the Siebel Report Viewer window, click the print button.

6 To return to the Providers list, in the Siebel Report Viewer window, click the close button.

Billing Accounts 15

To handle the payment of policy premiums, insurance companies use something called a billing account. A *billing account* is a construct that is used to handle the billing and payment activities associated with one or many insurance policies. The policy premiums are billed and collected through the billing account. This allows insurance companies to give users the flexibility to pay their premiums through a single bill, even though they may have several policies.

Siebel eHealthcare provides flexibility for companies to handle billing-oriented transactions in various ways. Although billing accounts are a popular method within the industry, many companies handle billing on a single policy basis and many use a blend of billing account and single policy billing.

Using the procedures given in this chapter, end users will be able to use the Billing Accounts screen to add a billing account, associate a billing account with a policy, contact, or company, and add a service request to a billing account.

Business Scenario

This scenario features sample tasks performed by an insurance agent. Your company may follow a different workflow according to its business requirements.

An insurance agent creates a new billing account to manage the various policies held by one of her customers. First, she associates the policies and certain contacts with the billing account. In this context, a *contact* can be someone who is responsible for paying the bills associated with an account or someone associated with the billing account, such as the secondary insured on a policy.

Later, the insurance agent receives a call from one of her contacts. The contact has a problem with his latest bill. The insurance agent logs a service request against the customer's billing account.

Billing Accounts Sample Tasks

This section details sample tasks often performed by end users when working with billing accounts. Your company may follow a different workflow according to its business requirements.

End-User Procedures

The following list shows tasks end users typically perform when working with billing accounts.

- **Create new billing accounts.** For more information, see "To add a billing account" on page 188.
- **Associate a billing account with a policy, contact, or company.** For more information, see "To associate a billing account with a policy" on page 189 and "To associate a billing account with a contact or a company" on page 190.
- **Add a service request to a billing account.** For more information, see "To add a service request to a billing account" on page 190.

End-User Procedures

The following end-user procedures are described in this section:

- To add a billing account
- To associate a billing account with a policy on page 189
- To associate a billing account with a contact or a company on page 190
- To add a service request to a billing account on page 190

Creating a Billing Account Record

End users can add a new billing account record from any Billing Accounts view, including the Contacts screen, the Companies screen, the Service Requests screen, or the Billing Accounts screen.

To add a billing account

1. Navigate to the Billing Accounts screen.
2. In the More Info form, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Account #	Automatically generated by the application. You can configure Siebel eHealthcareto assign a billing account number based on your company's standards and conventions.
Effective Date	Set to the current date.
Status	Set to New.
Type	The type of billing account. Select: ■ Single Policy if you will associate only one policy with the billing account. ■ Multiple Policy if you will associate more than one policy with the billing account.

Associating Billing Accounts with Other Records

Billing accounts can be associated with policies, contacts, companies, service requests, and households. End users can make the associations directly from the Billing Accounts screen, the Contacts Billing Accounts view, or the Companies Billing Accounts views.

Billing accounts can only be associated with households through an implicit relationship with a contact. That is, a billing account must be associated with a contact who is a member of a household in order for the billing account to be associated with the household. This relationship is then visible in the Households Billing Accounts view.

To associate a billing account with a policy

1. Navigate to the Billing Accounts screen.
2. In the Billing Account list, select the billing account for which you want to associate a policy.
3. Click the Policies view tab.
4. In the Policies list, add a record.

   The Add Policy dialog box appears.
5. Do one of the following:
   - If the policy already exists, select the policy in the Add Policy dialog box.
   - If the policy does not yet exist, click New to create a new policy.

   The Add Policy dialog box closes and a record is added to the Policies list.
6. Complete the necessary fields.

   The policy is now associated with the billing account.

NOTE: The billing account type determines how many policies should be associated. If the type is Single Policy, then only one policy should be associated.

To associate a billing account with a contact or a company

1 Navigate to the Billing Accounts screen.

2 In the Billing Account list, select a billing account with which you want to associate a contact or a company.

3 Click the Contacts view tab.

4 Do one of the following:

- In the Contacts list, click New and either select or add a contact in the Add Contact dialog box.

- In the Organizations list, click New and either select or add a company in the Add Companies dialog box.

The selected contact or company is now associated with the billing account.

To add a service request to a billing account

1 Navigate to the Billing Accounts screen.

2 In the Billing Account list, select a billing account that you want to associate a service request.

3 Click the Service Requests view tab.

4 In the Service Requests list, add a record and complete the necessary fields.

A new service request record appears, with an automatically generated SR #.

Integration 16

The Siebel Financial Services eBusiness platform combines a set of tools, technologies, and prebuilt functional integration components to facilitate application integration. This set of products are referred to as Siebel Financial Services eBusiness Application Integration (eAI). Siebel Financial Services eAI is an EAI solution built on top of Siebel eAI offered by Siebel Systems. Siebel Financial Services eAI provides an integration solution using industry XML standards. These standards have been adopted by the industry and extended by middleware companies such as IBM MQSFSE.

Siebel Financial Services eAI is designed as a set of interfaces that interact with each other and with other components within the Siebel application. These interfaces:

- Allow configurable messages within Siebel Tools for exchanging information using the various industry XML standards.
- Expose internal Siebel Objects to external applications.
- Take advantage of prebuilt adapters and enterprise connectors, and are compatible with third-party adapters and connectors.
- Allow prebuilt XML connectors for Siebel applications.
- Allow for comprehensive data transformation.
- Allow extension for customized XML connectors by providing the Siebel Industry XML Connector Factory API.

For more information on Siebel eAI, see *Siebel Financial Services eBusiness Application Integration Guide* and *Overview: Siebel eBusiness Application Integration Volume I*.

Siebel eHealthcare Integration Messages

Siebel eHealthcare includes a number of integration messages designed to support key business processes for the healthcare industry. Table 5 describes these messages by defining the message type, the message purpose, the target application, and where you can find more information about it.

Table 5. Siebel eHealthcare Integration Messages

Type	Message	Target Application	Description
ASI	Request Add/Cancel Group Policy Member	Policy Administration System	A message to add or cancel a group policy member. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Response Add/Cancel Individual Policy Member	Policy Administration System	A message to add or cancel an individual policy member. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Request Authorization	Referrals and Authorizations System	A message to search for appropriate providers. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Request Benefit Detail	Benefits System	A message to submit information required for determining eligibility. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.

Table 5. Siebel eHealthcare Integration Messages

Type	Message	Target Application	Description
ASI	Request Member Details Update	Membership System	A message to update demographic and contact details for a member. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Request Preliminary Rating	Rating Engine	A message to request a preliminary rate based on census and plan information. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Request Providers	Provider System	A message requesting benefit detail. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Request Referral	Referrals and Authorizations System	A message to submit authorization request. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
ASI	Update Provider Details	Provider System	A message to update the demographic and contact details for a provider. For information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.
VCML	Request Claim Status Date Request	Claim Administration System	A request message for claim status and date.
VCML	Request Claim Status Date Response	Claim Administration System	The response message to a request message for claim status and date.

Table 5. Siebel eHealthcare Integration Messages

Type	Message	Target Application	Description
VCML	Request Claims Adjudication Request	Claim Administration System	A message submitting claims detail to request for adjudication.
VCML	Request Claims Adjudication Response	Claim Administration System	The response message to an adjudication request. It may contain advice of amount payable and Explanation of Benefits.

Siebel eHealthcare Reports A

Table 6 lists the Actuate reports that are specific to the Siebel eHealthcare. For more information about Actuate reports, including how to customize, enhance, and create Siebel reports, see *Siebel Reports Administration Guide.*

Table 6. Siebel eHealthcare Reports

Report Name and Description	Navigation Path	Report Selection
FINS Call Report Detail Displays call report details, participating contacts and employees, action items, and notes of a single call report.	Call Reports > My Call Reports	Detail
FINS Call Report Summary Displays the company profile of commercial banking clients including a corporate summary, financial profile, subsidiaries, contacts, and activities.	Call Reports > My Call Reports	Summary
FINS Contact Profile Displays contact profile information such as name, address, date of birth, interests, experience, and activities.	Contacts > My Contacts	Profile
FINS Demo Health Providers by Product - Healthcare Displays lists of healthcare providers, grouped by health insurance product, with their contact and location information.	Providers > My Providers	Provider by Product

Table 6. Siebel eHealthcare Reports

Report Name and Description	Navigation Path	Report Selection
FINS Demo Health Providers by Specialty - Healthcare Displays lists of healthcare providers, grouped by their specialty, with their contact and location information.	Providers > My Providers	Provider by Specialty
Opportunities - By Product Line	Opportunities > My Opportunities	By Product Line

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