



Managing an Organisation

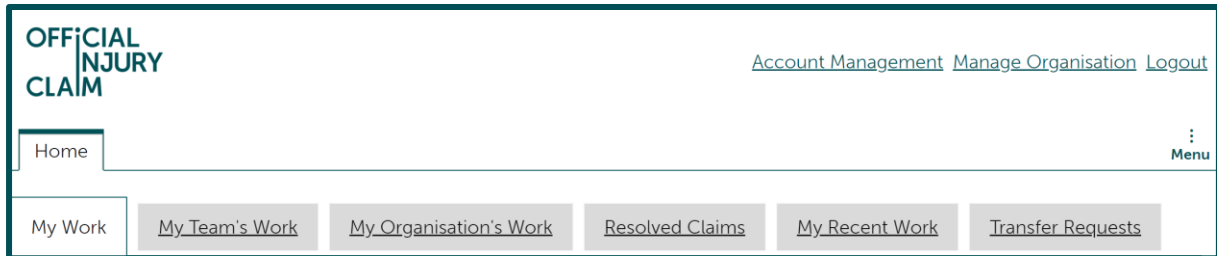
OFFICIAL
INJURY
CLAIM

Contents

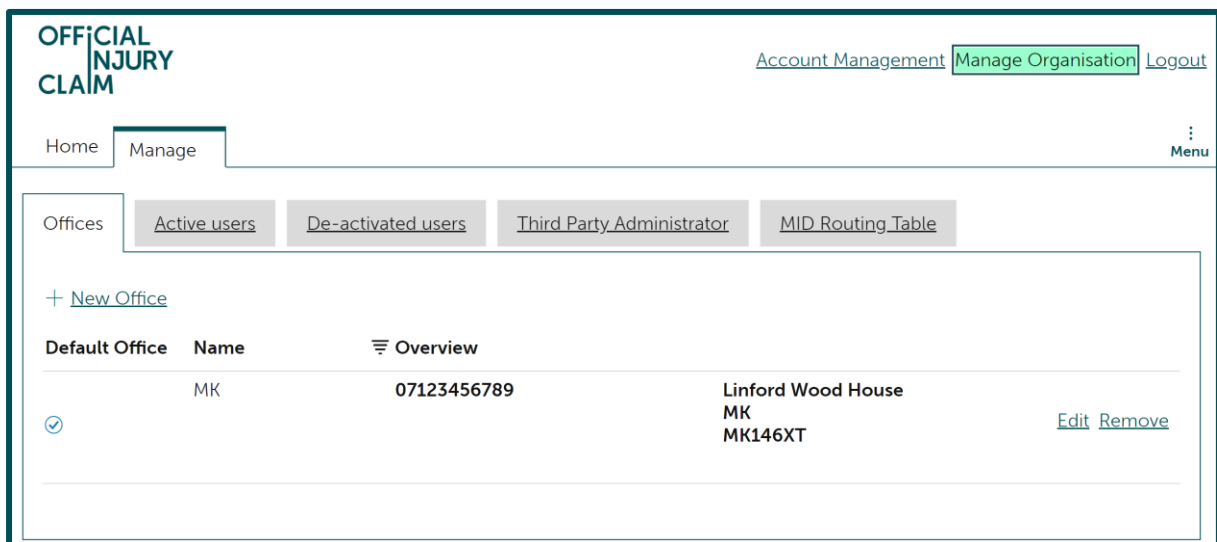
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Creating Offices

Organisation administrators will have the below link to the 'Manage Organisation' section, to begin to manage the offices, select this.



Upon clicking 'Manage Organisation' the below screen will show with any current offices registered to your organisation. To add a new office, select 'New Office' as shown below.



Upon clicking 'New Office' the below screen will appear. Here you can add the necessary details.

Create new office ✕

Office name *

Phone number *

Postcode *
or [Enter address manually](#)

Office is isolated

If you require the users within this office to only see claims assigned here, you can select the office to be isolated.

Office is isolated

By Isolating this office all users within this office will only see work assigned to this office and no other users will be able to search or find these claims.

You will be asked if you wish for this office to be the default office of the organisation. Default offices can be changed at any time in the 'Manage Organisation' section under the 'Office' tab.

Should the new office be the Default Office of the Organisation?

Yes No

The new office will then show in the 'Offices' tab.

Offices			
Active users			
De-activated users			
Third Party Administrator			
MID Routing Table			
+ New Office			
Default Office	Name	Overview	
<input type="radio"/>	OIC	00000000	OIC Linford Wood Linford Wood MK Bucks MK146XT Edit Remove
<input checked="" type="radio"/>	MK	07123456789	Linford Wood House MK MK146XT Edit Remove

Editing an office

To edit an office, you will need to select the 'Edit' link on the right side of the table.

The screenshot shows a web interface for managing offices. At the top, there are tabs for 'Offices', 'Active users', 'De-activated users', and 'Claims transfer'. Below the tabs, a message states 'Office has been successfully created'. There is a '+ New Office' link. A table lists two offices:

Default Office	Name	Overview	
<input checked="" type="radio"/>	Milton keynes	07783691714 1234/67	24 Church End Road Shenley Brook End MILTON KEYNES Buckinghamshire MK57AB Edit Remove
<input type="radio"/>	Rooksley	012345678 1234	Office Line 2 Line 3 Town County MK557FD Edit Remove

This will open a pop-up which will allow you to edit the office number and address, you are unable to edit the Office Name or SRA / Law Society Number (applicable to pro-users only). If this needs to be amended, you will need to add a new office.

The 'Edit office details' pop-up form contains the following fields and controls:

- Office Name:** Milton keynes
- Phone number*:** 07783691714
- SRA / Law Society Number:** 1234/67
- Postcode*:** MK57AB
- Find address:** A button to search for the address based on the postcode.
- or Enter address manually:** A link to manually enter the address.
- Default Office:** A checked checkbox.
- Submit:** A yellow button to save changes.
- Cancel:** A grey button to close the form.

Please note the system will use the address for the default office to populate documents. For compensators, the default office details will be presented to the claimant for contact information.

To amend the default office, you will need to edit the desired default office and check the 'Default Office' checkbox. If the office selected is the default office, this box will be checked.

Edit office details ✕

Office Name
Milton keynes

Phone number*

SRA / Law Society Number
1234/67

Postcode*

or [Enter address manually.](#)

Default Office

Adding a new User

In the Manage Organisation section, you can manage users under the 'Active users' tab. This function is available to Organisation Administrators and Office Administrators. To edit a user, you can select the pencil icon on the right of the user, to deactivate the user, you will need to select the bin icon.

The screenshot shows the 'Manage Organisation' interface. At the top, there are navigation links: 'Account Management', 'Manage Organisation', and 'Logout'. Below this, there are tabs: 'Home', 'Manage', and a 'Menu' icon. Under the 'Manage' tab, there are sub-tabs: 'Offices', 'Active users', 'De-activated users', 'Third Party Administrator', and 'MID Routing Table'. The 'Active users' tab is selected, showing a table with columns: Name, Office, Status, and Role. There are three rows of users, each with a checkbox on the left and edit/delete icons on the right. A '+ Add new user' button is located at the top left of the table area, and a 'Transfer users' link is at the top right.

<input type="checkbox"/>	Name	Office	Status	Role	
<input type="checkbox"/>	Model Compensator API MK		Active		
<input type="checkbox"/>	Test Test	MK	Active	Organisation Administrator	
<input type="checkbox"/>	Test Test	MK	Active	Claim Handler	

To add a user, you can select 'Add new user' which will bring up the below screen.

The 'Add new user' form is a modal window with a close button (X) in the top right corner. It contains the following fields:

- First name * (text input)
- Last name * (text input)
- Email * (text input)
- Role * (dropdown menu with 'Select' as the current value)
- Office * (dropdown menu with 'Select' as the current value)

At the bottom of the form, there are two buttons: a yellow 'Submit' button and a grey 'Cancel' button.

Here you can select their role and which office you would like to assign the user to. The dropdown will show any offices that have been added to the organisation.

Role *

Select ▾

Select

Organisation Administrator

Office Administrator

Claim Handler

Office *

Select ▾

Select

MK

OIC

Editing a User

Editing the user works similarly to the above. You can amend the first and last name of the user as well as change the office in which a user is assigned to and amend their role. You cannot change the email address assigned to a user.

Edit existing user
✕

First name*

Last name*

Email

prouser1@mib.co

Role*

Select
▾

Office*

Milton keynes
▾

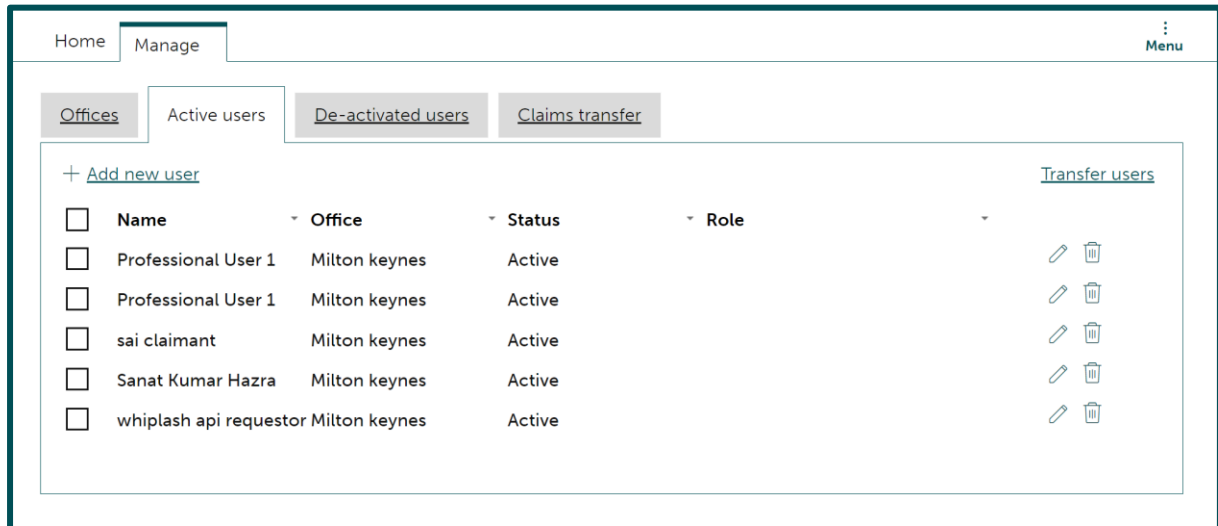
Submit

Cancel

Should the email address need to be amended for a user, a new user entry will need to be added with the correct email address.

Deactivating/Reactivating a User

Where a user needs to be deactivated, for example if they have left the business. You can remove a users ability to access the service within your organisation by deactivating them. To do this the bin icon on the far right should be selected.



Once

Transferring Users between Offices

You can also do this as a bulk action by checking the tickbox of the users you wish to transfer and selecting 'Transfer users'.

+ Add new user					Transfer users
<input type="checkbox"/>	Name	Office	Status	Role	
<input type="checkbox"/>	Model Compensator API	MK	Active		
<input type="checkbox"/>	Test Test	MK	Active	Organisation Administrator	
<input type="checkbox"/>	Test Test	MK	Active	Claim Handler	

You will then see the below screen which will show the users selected and allows you to select the office you wish to transfer them to.

Transfer users ✕

[Review users to be transferred](#)

Name	Current office
Test Test	MK

New office *

Select... ▾

Select...

OIC

MK

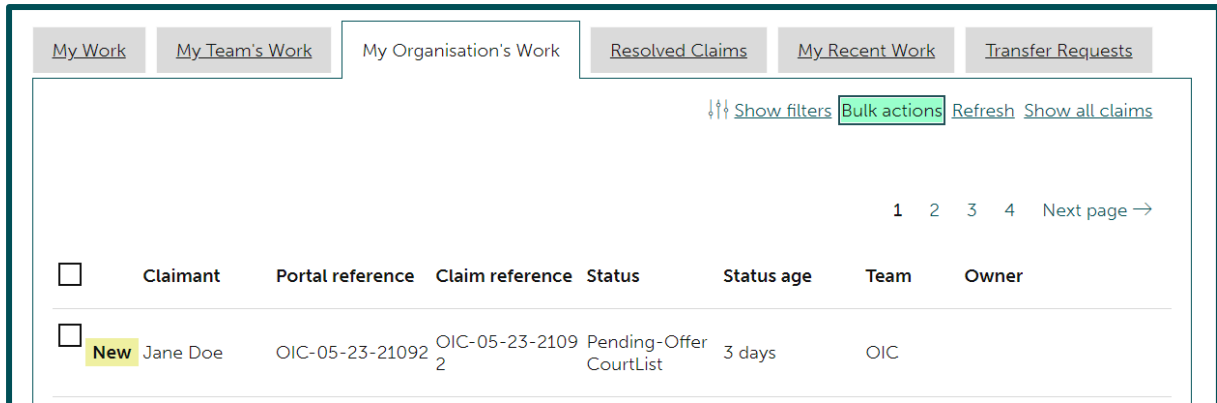
Cancel

Once they have been transferred the office column will show which office the user is currently assigned to.

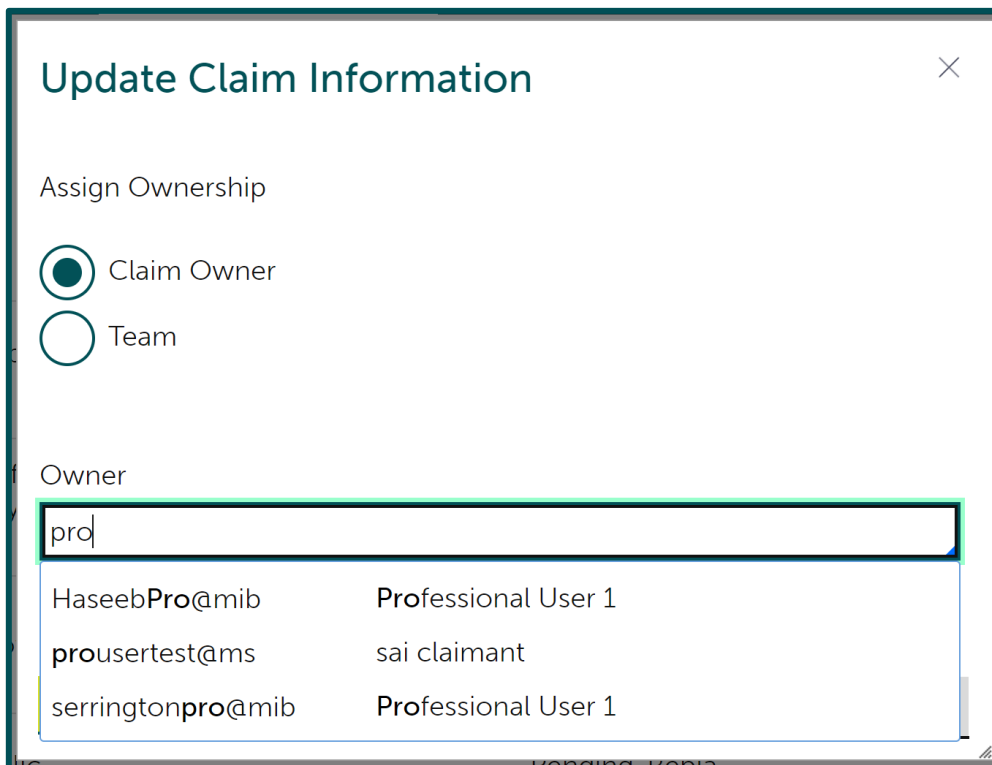
<input type="checkbox"/>	Name	Office
<input type="checkbox"/>	Model Compensator API MK	
<input type="checkbox"/>	Test Test	OIC
<input type="checkbox"/>	Test Test	MK

Transferring a Claim between Users

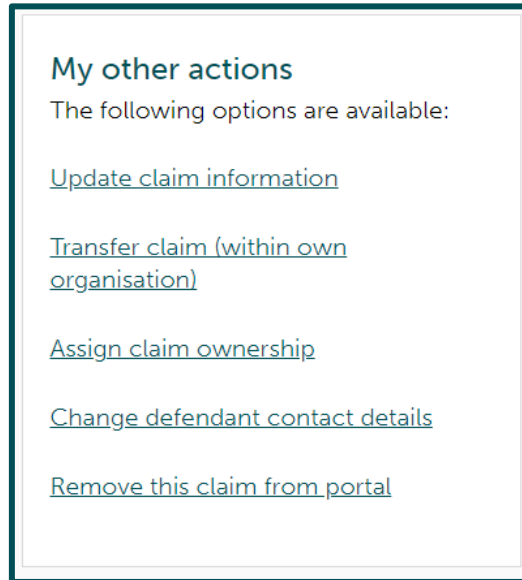
To transfer claims to another office, you can do so by checking the tickbox on the left for the necessary claims, then selecting 'Bulk actions'.



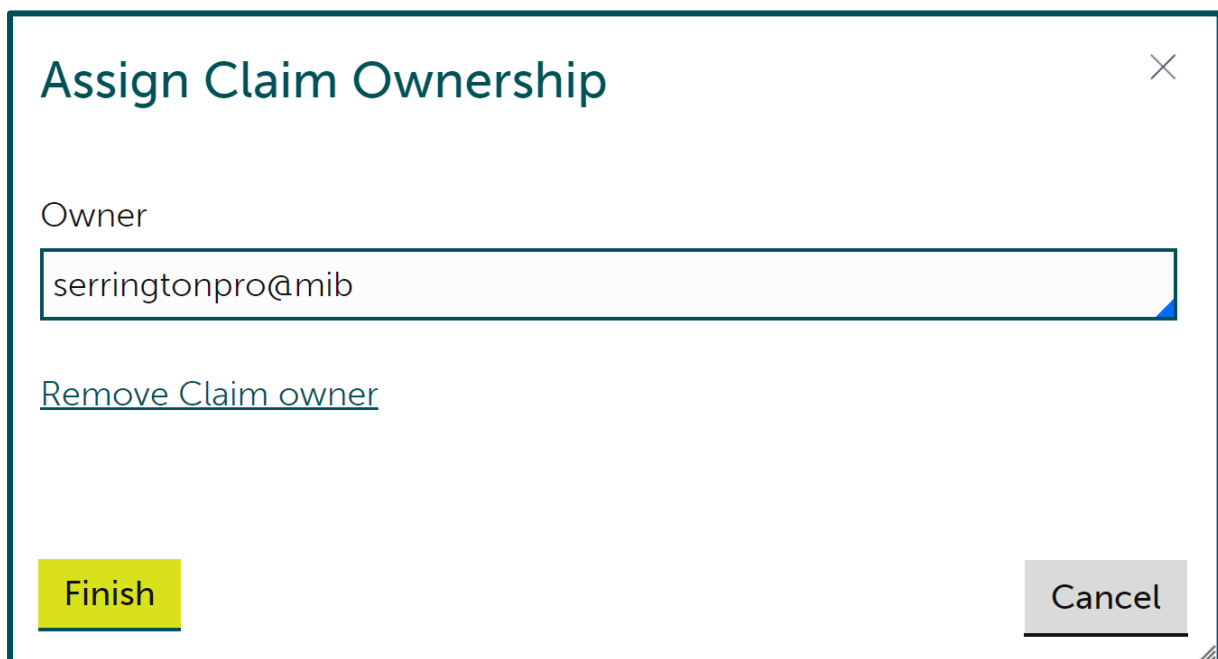
This will bring up the below screen where you can select the claim owner option to transfer between users. You can then use the text box provided to enter the name of the user you wish to assign claim ownership to and select them from the drop down before pressing 'Submit' to confirm.



This can also be done within a claim on the 'Claim overview' screen under 'My other actions'. Using the 'Assign claim ownership link.



Upon clicking this link, you will be presented with the below pop up, where you can clear the claim owner or select a new one from the box provided. Selecting 'Finish' will save these changes.



Transferring a Claim between Offices

To transfer claims to another office, you can do so by checking the tickbox on the left for the necessary claims, then selecting 'Bulk actions'.

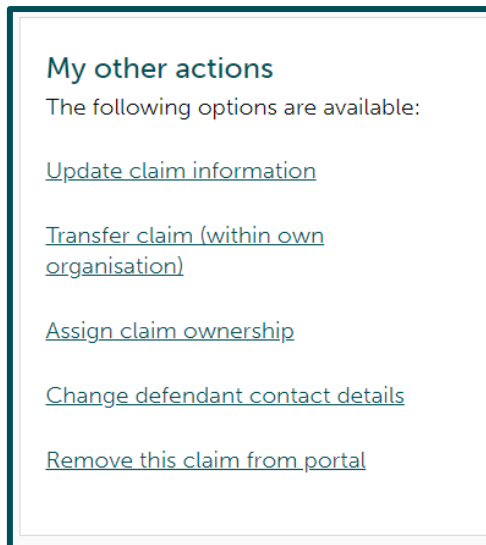
The screenshot shows a web interface with several tabs: 'My Work', 'My Team's Work', 'My Organisation's Work', 'Resolved Claims', 'My Recent Work', and 'Transfer Requests'. The 'My Organisation's Work' tab is active. Below the tabs, there are links for 'Show filters', 'Bulk actions' (highlighted with a green box), 'Refresh', and 'Show all claims'. A table of claims is displayed with columns: Claimant, Portal reference, Claim reference, Status, Status age, Team, and Owner. The first row shows a claim for 'Jane Doe' with a 'New' tag, portal reference 'OIC-05-23-21092', claim reference 'OIC-05-23-21092', status 'Pending-Offer CourtList', status age '3 days', and team 'OIC'. A 'Bulk actions' button is highlighted in the interface.

This will bring up the below screen where you can select the team option to transfer between offices and select which office you would like to assign the claim to from the dropdown menu.

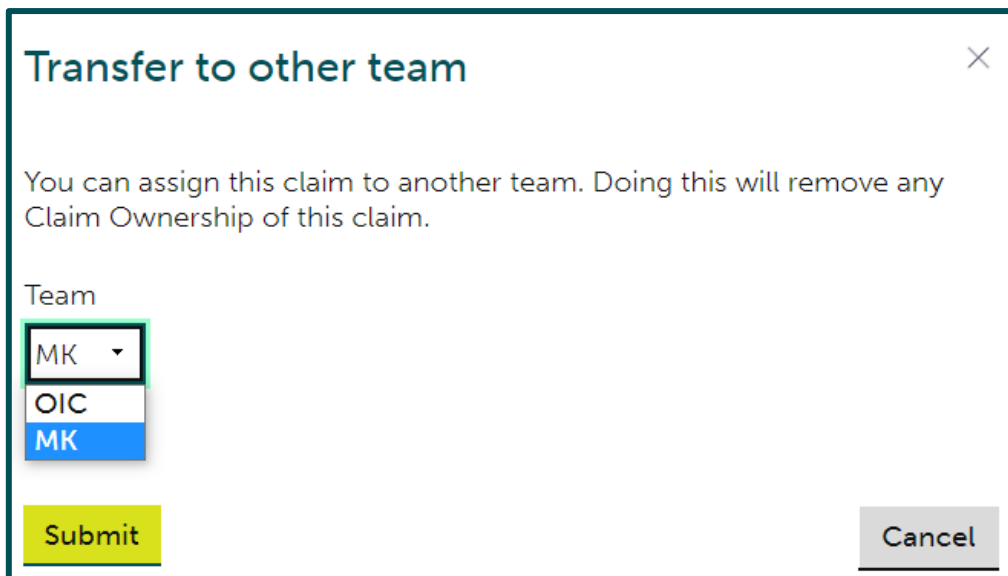
The 'Update Claim Information' dialog box has a close button (X) in the top right corner. It contains the following elements:

- Assign Ownership:** A heading followed by the text: "You can assign this claim to another team. Doing this will remove any Claim Ownership of this claim."
- Radio Buttons:** Two radio buttons are present: 'Claim Owner' (unselected) and 'Team' (selected).
- Team:** A dropdown menu is open, showing 'OIC' and 'MK' as options.
- Buttons:** A yellow 'Submit' button and a grey 'Cancel' button are located at the bottom of the dialog.

Claims can also be assigned to offices by opening up the claim to the 'Claim overview' page and heading to the 'My other actions' section where you can select 'Transfer claim (within own organisation)'



Upon clicking 'Transfer claim (within own organisation)' the below screen will appear, this is where the user can change the office in which the claim is assigned to.



You can also filter to see which claims are assigned to which office by selecting 'Show filters' and filtering by 'Organisation's team'. Users assigned to offices can see the work allocated to their office by selecting the 'My Team's Work' tab.

The screenshot displays a web interface for filtering claims. At the top, there are navigation tabs: 'My Work', 'My Team's Work', 'My Organisation's Work' (which is active), 'Resolved Claims', 'My Recent Work', and 'Transfer Requests'. Below the tabs, there are links for 'Hide filters', 'Bulk actions', 'Refresh', and 'Show all claims'. A message states: 'If you fill out multiple filter criteria, the results will only include claims that match all criteria.' The filter section contains the following fields:

- Portal reference number: text input
- Insurer policy number: text input
- Claimant Name: text input
- Responsible driver registration number: text input
- Responsible driver name: text input
- Claimant car registration number: text input
- Accident date - from: date picker
- Accident date - until: date picker
- Organisation's team: dropdown menu with options 'Please Select--', 'OIC', and 'MK'
- Claim status: dropdown menu
- Claim Owner: text input

At the bottom left, there are two buttons: a yellow 'Filter' button and a grey 'Clear filters' button.