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FAX ADMINISTRATOR

Training Guide

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Role and Responsibilities

The Fax Administrator is responsible for retrieving inbound eFaxes from a database in Lotus Notes and routing them to the appropriate departments for processing.

This document provides step-by-step instructions for routing an eFax to the appropriate department.

Sun Life Financial members submit health and dental claims for compensation on a regular basis, but incomplete or insufficient information may cause processing delays. When a claim is denied or delayed, members are instructed to submit further documentation via fax. Faxed documents (i.e. receipts, invoices, referrals, new claim forms, etc.), are received by Sun Life Financial and automatically routed to a designated inbox in Lotus Notes. The Fax Administrator must retrieve these eFaxes from the inbox, attach the document(s) to a member's account in Siebel CRM, and route the document(s) to the appropriate departments for further processing.

Programs Required

You have been granted access to the programs below. Open the following applications at the start of each day:

- Lotus Notes – Contains the CCR eFax database
- CCR eFax – eFax database within Lotus Notes where incoming faxes are received and Automatically converted to eFaxes
- Siebel – Client Relationship Management (CRM) application where eFaxes are saved
- Fax KM – Document containing fax routing information and email templates
- Ultera – Application used for adjusting pending health and dental claims

Access the Fax Database

How Faxes are Received

Documents faxed to the Sun Life Financial Group Benefits fax number are automatically converted to an eFax and routed to the CCR eFax database in Lotus Notes, where multiple Fax Administrators work independently to route large volumes of eFaxes to various departments for processing.

Take Ownership of eFaxes

There are multiple Fax Administrators working out of the CCR eFax database at any given time, so everyone must take ownership of several eFaxes to work on throughout the day.

To take ownership of eFaxes:

1. Access the CCR eFax database through Workspace in Lotus Notes.
2. Filter the eFax emails by date, highlight any number of eFaxes with the oldest received date, and click **Take Ownership**. These eFaxes will be moved to a folder labeled with your name.
3. Return to the main database and take ownership of several more eFaxes once you have completed processing those within your folder. Repeat this process until the database is empty.

Note: You cannot return eFaxes to the main database once you have taken ownership. If you are unable to finish processing all the eFaxes in your folder, ask your co-workers to take ownership of your eFaxes.

Route a Fax Using Lotus Notes

Use the following steps as a guide for how to route an eFax using Lotus Notes.

These incoming eFaxes are new claims and are not associated with a pending claim. They will need to be attached in Siebel and forwarded using Lotus Notes to a specific department for processing.

Begin in Lotus Notes

1. Double-click on an eFax email to open.
2. Open the attached .TIF and save a copy to a designated folder on your computer labeled with today's date.

In Siebel

1. Click the **GB SR** tab, and click **All Service Requests**.
2. If a Service Request Number (SR#) is written on the eFax, type the SR# in the Siebel search box, click **Go**, and click the SR# to open the member's account.

Note: If there is no SR#, search for the member within Siebel using other information from the fax, such as: a policy and certificate number, access ID, or the member's full name and date of birth.

Tip: An SR# is automatically generated when the member speaks with a Customer Service Representative (CSR), and is the fastest way to locate a member's account in Siebel.

3. Confirm that the first and last name on the account matches the name on the eFax. This is to ensure that confidential information is saved to the correct account.
4. In the **Account** dropdown menu, change the account from **Closed** to **Open** before proceeding.
5. Click the **Documents Received** box.

Important: Once a .TIF has been attached to a member's file, you cannot remove the attachment. Ask your manager to submit a Jira request to have the document removed.

6. Under the **Attachments** tab in Siebel, click **New File**, and attach the .TIF.
7. Read the **Comments** box, which details which department to route the eFax to.
8. Click on the **Summary** tab and click **New** to create a record of your activities. Always fill in the following information in each field: **Activity type**: **Fax Inbound**; **Category**: **Inbound Call**; **Reason**: **Misc**; **Comment**: **Fax**; **Description**: a comment about where the fax will be routed to.
9. In the **Account** dropdown menu, change the account from **Open** to **Closed**.

Return to Lotus Notes

1. Use your Fax KM document to find the email address and template for the department you are routing the eFax to, and forward the original eFax email with the .TIF attached, via Lotus Notes.
2. Once forwarded, drag and drop the eFax email to the **Storage** folder.

The process is complete! The fax has now been retrieved from the CCR eFax database, attached in Siebel, and routed to the appropriate department via Lotus Notes for processing. The member will be notified if the claim is successfully processed or if more information is required.

Route a Fax Using Ultera

Use the following steps as a guide for how to route an eFax using Ultera.

These eFaxes are received when a member is faxing documentation for the adjustment of a pending health or dental claim. The claim number already exists in the system, so the fax must be attached in Siebel *and* attached to the existing claim in Ultera before it can be reprocessed.

Begin in Lotus Notes

1. Double-click on an eFax email to open it.
2. Open the attached .TIF and save a copy to a designated folder on your computer.

In Siebel

1. Click the **GB SR** tab, and click **All Service Requests**.
2. If a Service Request Number (SR#) is written on the eFax, type the SR# in the Siebel search box, click **Go**, and click the SR# to open the member's account.

Note: If there is no SR#, search for the member within Siebel using other information from the fax, such as: a policy and certificate number, access ID, or the member's full name and date of birth.

Tip: An SR# is automatically generated when the member speaks with a Customer Service Representative (CSR), and is the fastest way to locate a member's account in Siebel.

3. Confirm that the first and last name on the account matches the name on the faxed document. This is to ensure that confidential information is saved to the correct account.
4. In the **Account** dropdown menu, change the account from **Closed** to **Open** before proceeding.
5. Click the **Documents Received** box.

Important: Once a .TIF has been attached to a member's file, you cannot remove the attachment. Ask your manager to submit a Jira request to have the document removed.

6. Under the **Attachments** tab in Siebel, click **New File**, and attach the .TIF.
7. Read the **Comments** box to find the existing claim number (CN) and claim processing number (CPN) entered by the CSR.
8. Click on the **Summary** tab and click **New** to create a record of your activities. Always fill in the following information in each field: **Activity type**: **Fax Inbound**; **Category**: **Inbound Call**; **Reason**: **Misc**; **Comment**: **Fax**; **Description**: a comment about where the fax will be routed to.
9. In the **Account** dropdown menu, change the account from **Open** to **Closed.**

In Ultera

1. Select the **Content** tab, click **New Content**, and attach the .TIF document. Click **Next**, copy and paste the CN and CPN from Siebel into the corresponding field in Ultera, and click **Finish**.
2. In the text box that appears, enter the following information in each field: **Claimant Name**:

   Faxed to CCC; **Product Type**: **Health** or **Dental** (depending on fax received); **Received Date**: Input the date the fax was received (YY/MM/DD); click **Save**.
3. Select the **Workflow** tab, and click **New Work Item**. In the dropdown menu, select **Adjustments**, and click **Next**.
4. Input the CPN and click **Next**.

5. From the dropdown menu, select the queue you will route the fax to and click **Continue.**

Tip: Route health-related documents to queue 94 and dental-related documents to queue 95.

6. Copy the member's policy and certificate number from Siebel and paste it into the appropriate fields in the text box that appears. Copy the CN from Siebel and paste it in the **Control Number** text field, and select the document classification (**Health** or **Dental**).
7. Click on the backpack icon on the toolbar to the left, which will open a text box.
8. From the dropdown menu **Work Queue**, select **Health** or **Dental**. In the **Reason** dropdown menu, select **Other (CHCA)**. In the **Instructions** box, paste the SR# from Siebel, and click **Submit**.

Return to Lotus Notes

1. Return to the eFax email in Lotus Notes and drag and drop the eFax email to the **Storage** folder.

The process is complete! The fax has now been retrieved from the CCR eFax database, attached in Siebel, and routed to Ultera for processing. The member will be notified if the claim is successfully processed or if more information is required.

Check Daily Feedback

Other Fax Administrators, Managers, or Customer Service Representatives can provide daily feedback through Siebel if an eFax was incorrectly attached or routed to the wrong department. The feedback is designed to help you learn where a mistake may have occurred, and how it can be prevented in the future.

To Check Daily Feedback in Siebel:

1. Click on the **GB Activities** tab, and select **New Query.**
2. Under **Status**, type "Open", and press **Go**. Any feedback you received will appear on the next screen.
3. Under **Status**, use the dropdown menu to change the status from **Open** to **Acknowledged** when you have finished reviewing your feedback.

The process is complete! You have now successfully reviewed your daily feedback in Siebel.

Summary

Congratulations! You have now learned how to successfully retrieve an eFax from Lotus Notes, attach it in Siebel, and route it appropriately for processing. Refer to this training guide for step-by-step instructions as needed as you develop the skills and knowledge necessary to successfully fulfill the Fax Administrator role at Sun Life Financial.

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