

Web Portal Overview for Assessors May 2018

Overview

- Key capabilities and why you need them
- Account activation and login assistance
- Dashboard functionality review
- End to end referral process tracking with all the bells and whistles

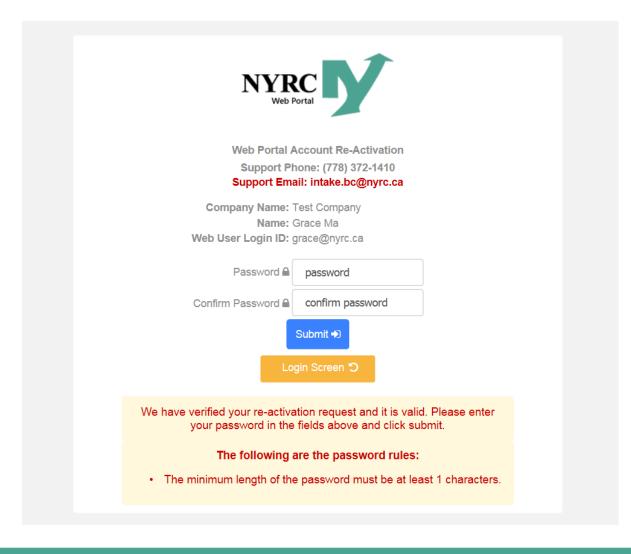


Key Capabilities

- View upcoming assessment schedules
- View medical records electronically eliminating securedocs, heavy binders and save trees!
- Upload dictations, draft reports and doctor notes
- View draft reports back from QA
- Upload finalized reports and invoices
- Track active referrals by status
- Receive automatic notification of key events such as: appointment scheduled, rescheduled, draft report uploaded, report finalized, etc.
- Send notes to NYRC regarding active referrals
- View referral details such as: case history notes, documents, letters, and reports
- Enforce industry standard SSL 128-bit encryption



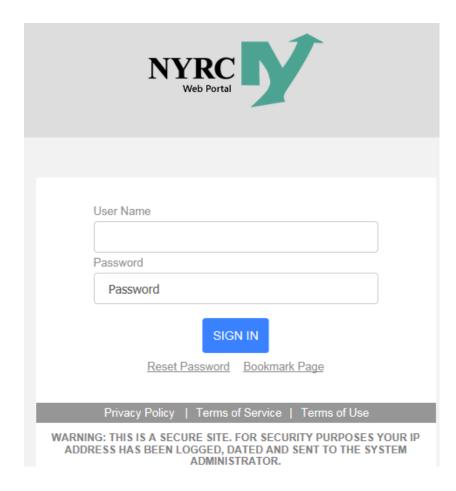
Activate Account





Bookmark New Secure Login

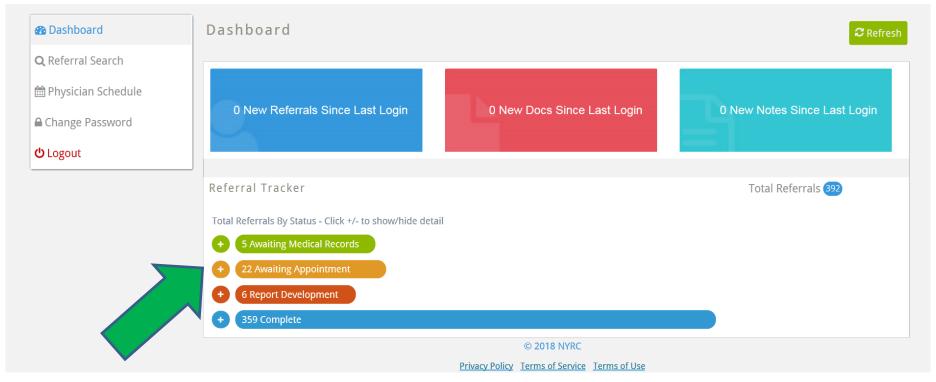
https://webportal.nyrc.ca/login.aspx?id=5





NYRC Webportal Dashboard

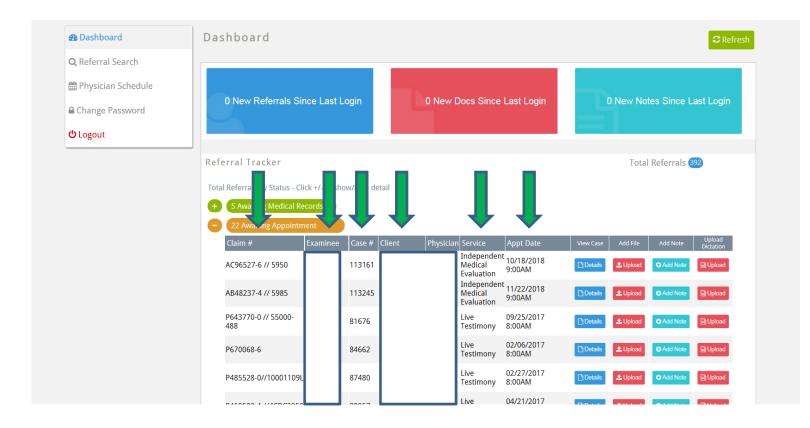
View referrals with medical records, Search referrals, and View referrals by status.



Expand and **Collapse** referrals by Status



Sorting Referrals



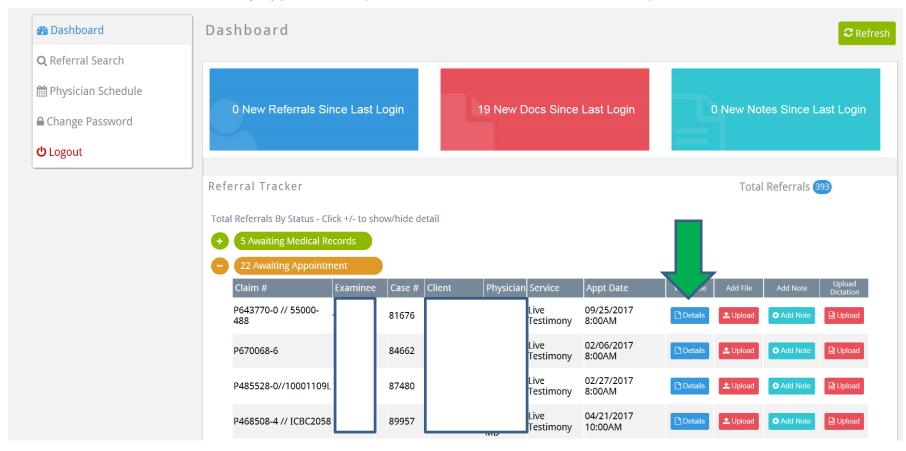
Sort Parameters:

- Claim Number
- Examinee
- Case Number
- Client
- Service
- Appt Date



View a Referral

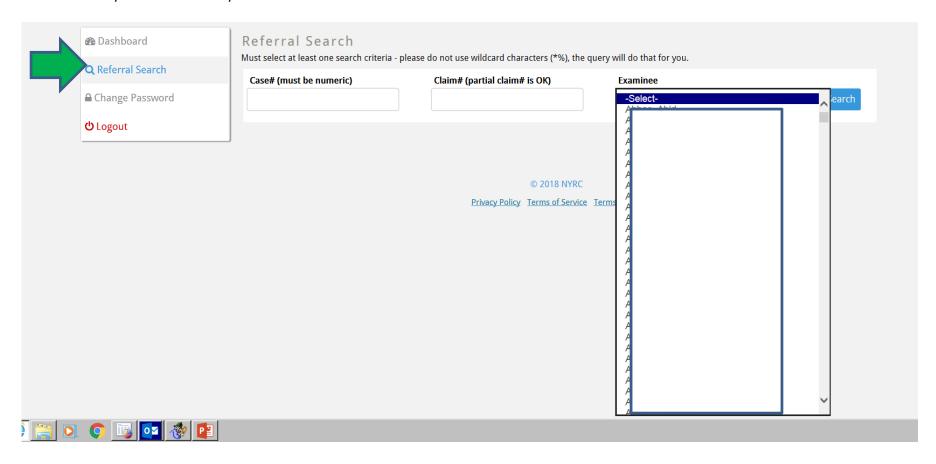
View referrals in the Awaiting Appointment queue. Click the Details button for case specifics.





Referral Search

Easily search referrals by examinee Last Name





View a Referral

Open a referral from the **Referral Search** page. View referrals in **Awaiting Appointment**. Click the **View** button.

Referral Search	Must select at least one search o	·			•		
🖺 Physician Schedule	Case# (must be numeric)	Clair	n# (partial clai	m# IS OK)	Examinee	<u>_</u> Q	Search
Change Password	Click on the heading to sort by that category						
	Web Ctl# Claim #	Web Status	Examinee	Case # Physician	Service Specialty	Appt Date	View
් Logout	114280 V902257-1 // 6377 A	Awaiting Appointment				05/18/2018 12:30PM	Details
	114072 V902257-1 // 6377 R	Report Development				n 05/17/2018 9:00AM	Details
	114072 V902257-1 // 6377 R	Report Development				1 05/17/2018 9:00AM	☐ Det
				© 2018 NYRC			
			Privacy Po	licy Terms of Service Te	rms of Use		

Get to a referral from the referral tracker on the dashboard or referral search.



View Referral Documents

Click the **Documents** tab to see a list of all documents associated with the referral those not yet viewed are indicated as **New**.



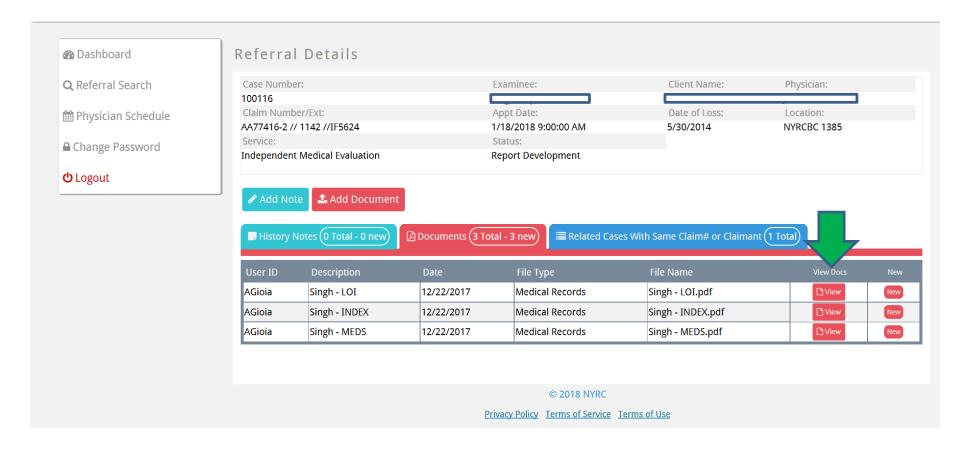
Types of documents:

- Confirmation Letters
- Doctor Instruction Letters
- Medical Records
- Invoices
- Reports



Opening Documents

Once you click View the document will load and you can download documents to your desktop for viewing/editing

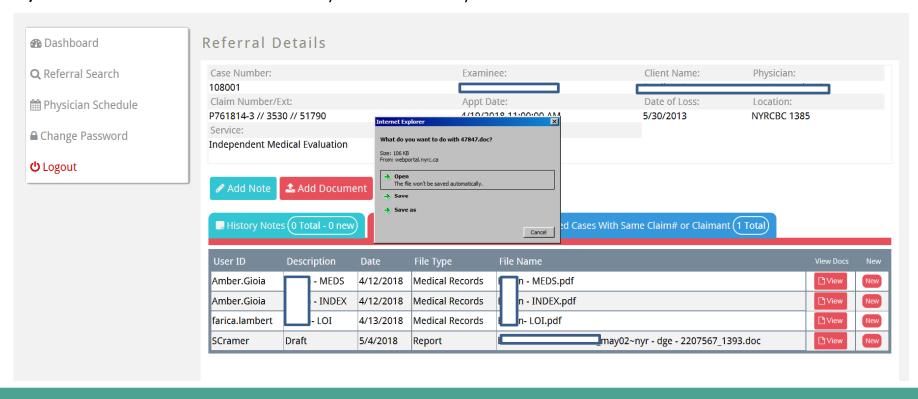




Downloading Documents

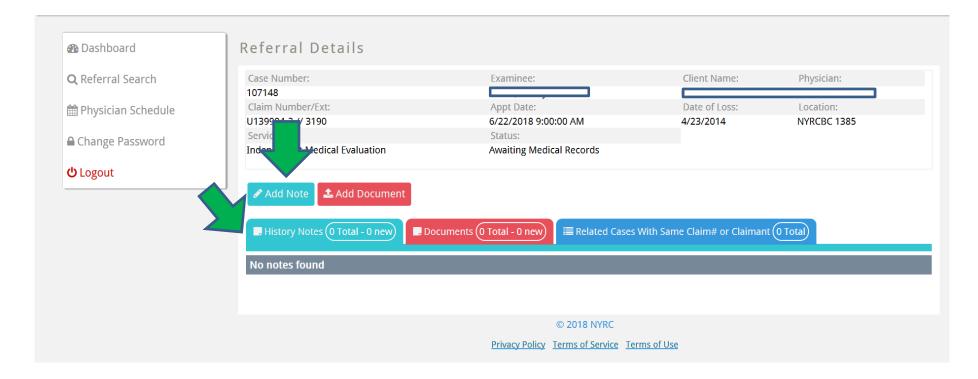
For PDF Documents: When you click **View**, the document will load in the NYRC Webportal. A random 5 digit number will be assigned to the document when you save it to your computer. Rename the document so you can find it easily **For Word Documents**: When you click **View**, you have the option to **Open**, **Save** or **Save As**:

- 1) Open this will open the document in the NYRC Webportal
- 2) Save A random 5 digit number will be assigned to the document when you save it to your computer. Rename the document so you can find it easily
- 3) Save As and rename the document so you can find it easily



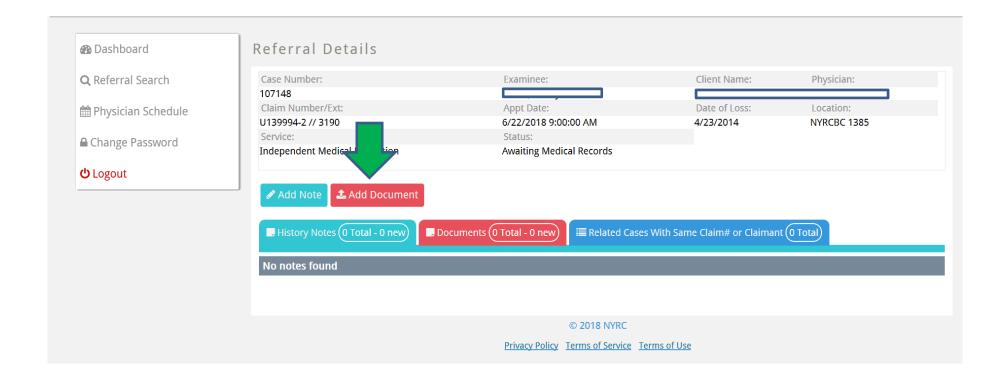
View a Referral and History Notes

View and Add new case history notes which will be received by NYRC if necessary.





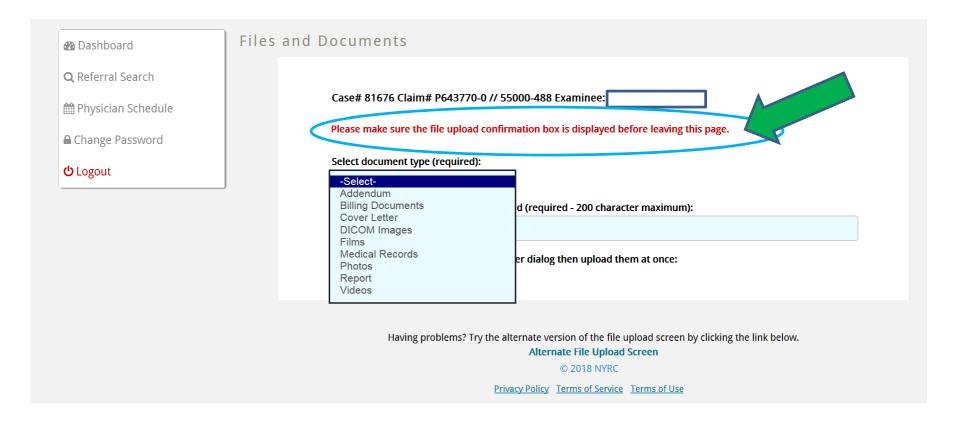
Attach a New Document





Uploading Documents

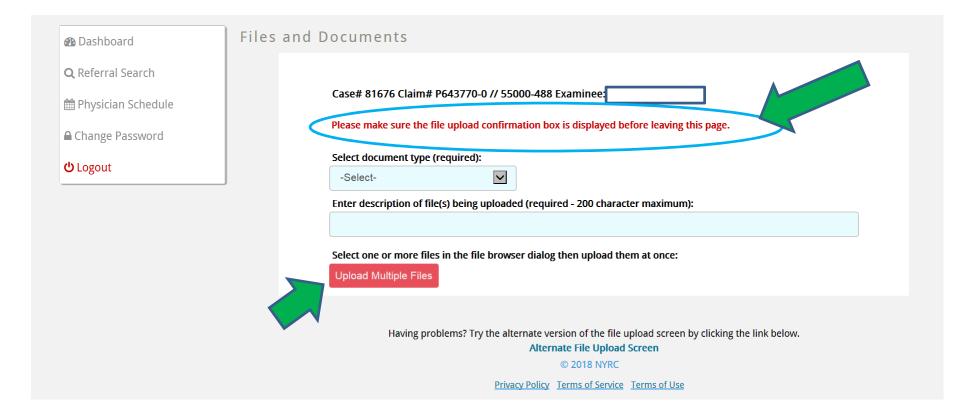
Select Document Type. Enter a description for the documents. Click **Browse** to find the documents on your system and click **Upload**.





Uploading Multiple Files

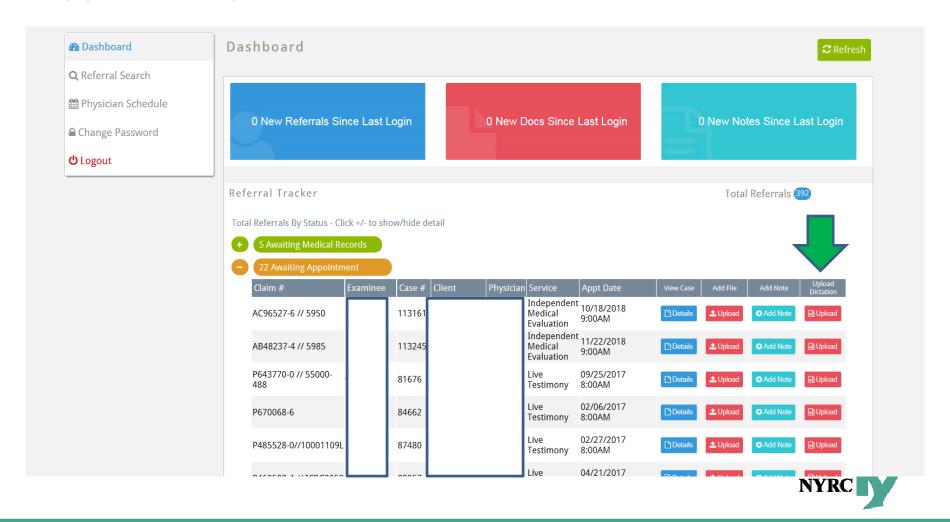
Enter a description for the documents. Click **Browse** to find the documents on your system and click **Upload**.





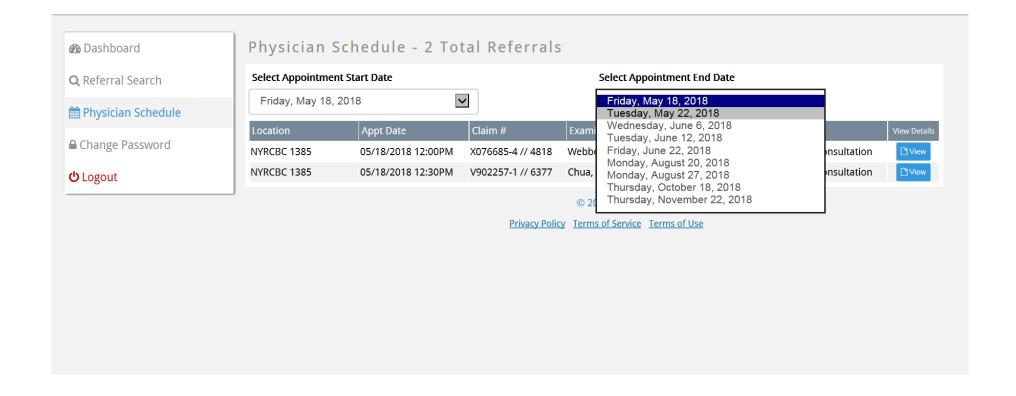
Uploading Dictation

Easily upload dictations for quicker turnaround times



Check Upcoming Appointments

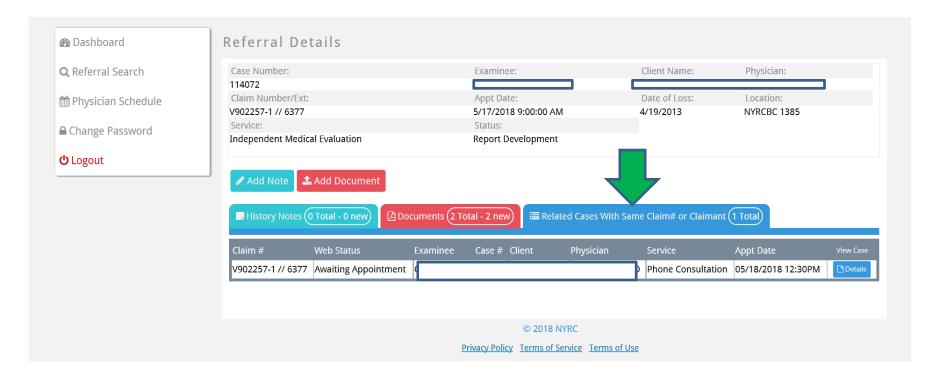
Easily check your upcoming schedule for your assessment dates





Related Cases (Addendums, Trial Notices, etc.)

Cases associated with the same claim number are also available for viewing





View the Report



Assessor receives email notification when the reports are available for viewing.



E-mail contains a **secure https link** to retrieve report.



The **report** can be viewed, printed or downloaded.





Communications

Communication between NYRC and assessor occurs at key points in the case workflow which is customizable based on assessor preferences.



Notifications

NYRC receives notifications when assessor:

- Uploads documents (draft report, final report, invoice)
- Enters a case history note



Notifications

NYRC receives notifications when assessor:

- Publishes:
 - Case history notes
 - Document
 - Report
- Announces progress of key events including:

New Referral

Show

Scheduled

No Show

Rescheduled

Late Cancel

Canceled

Report Finalized



Summary

- Streamlines referral workflow all on one platform
- Get real-time status and information
- Improve communications
- Access 24/7 from work, home or on the road
- Provide maximum security protections
- Easier to use
- Get better turn around times, fewer errors and on-time report delivery to clients



Discussion

We are here to listen to your requests to further enhance the NYRC web portal interface.

Thank you for your continued support.

We hope this new form of communications with NYRC gives you greater flexibility and saves you time.



