

# ClaimsPay<sup>®</sup>

## Vendor & Service Provider Portal User Guide

## Welcome!

The purpose of this document is to serve as a comprehensive guide for **Vendors / Service Providers** to understand the features and functionality of the **One Inc ClaimsPay<sup>®</sup> Vendor / Service Provider Portal**.

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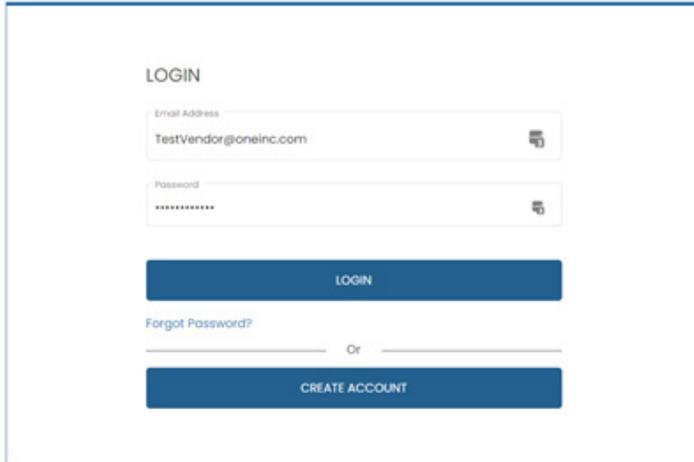
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## Who Is One Inc?

One Inc is a payments technology provider offering a **Digital Payments Platform** for insurance companies to receive premiums payments and send claims payments using secure web portals. One Inc also provides tools to communicate with customers via email, text, phone, and mail.

# Login

To login, point your browser to the One Inc **Vendor URL**. Type in the correct **User ID** and **Password** and then click the **Login** button. Note that you should have received a system generated email with your login credentials and the One Inc URL.



## Initial Password Reset

Upon first login, you will be required to set up a new password.

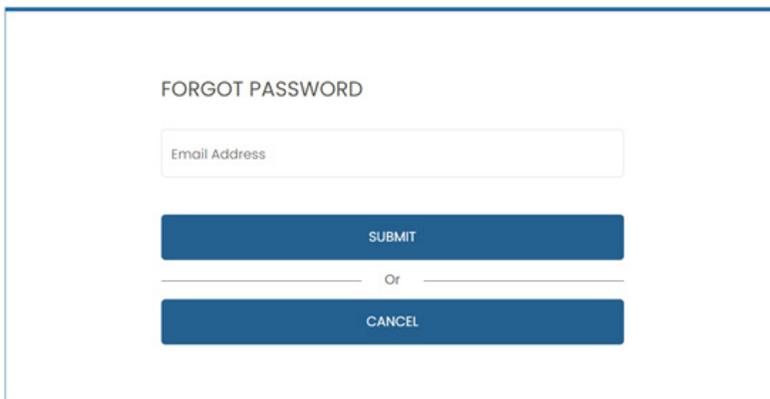
**Note:** After you are done setting your password, you will be prompted to login again.

## Forgot Password

In the event you try to login with an incorrect password more than 5 times, your account will be locked. You will need to call **Customer Support** to unlock your account.

To prevent being locked out of your account, click the **Forgot Password** link, enter your e-mail address, and click **Submit** to reset your password.

**Note:** After you are done resetting your password, you will be prompted to login again.

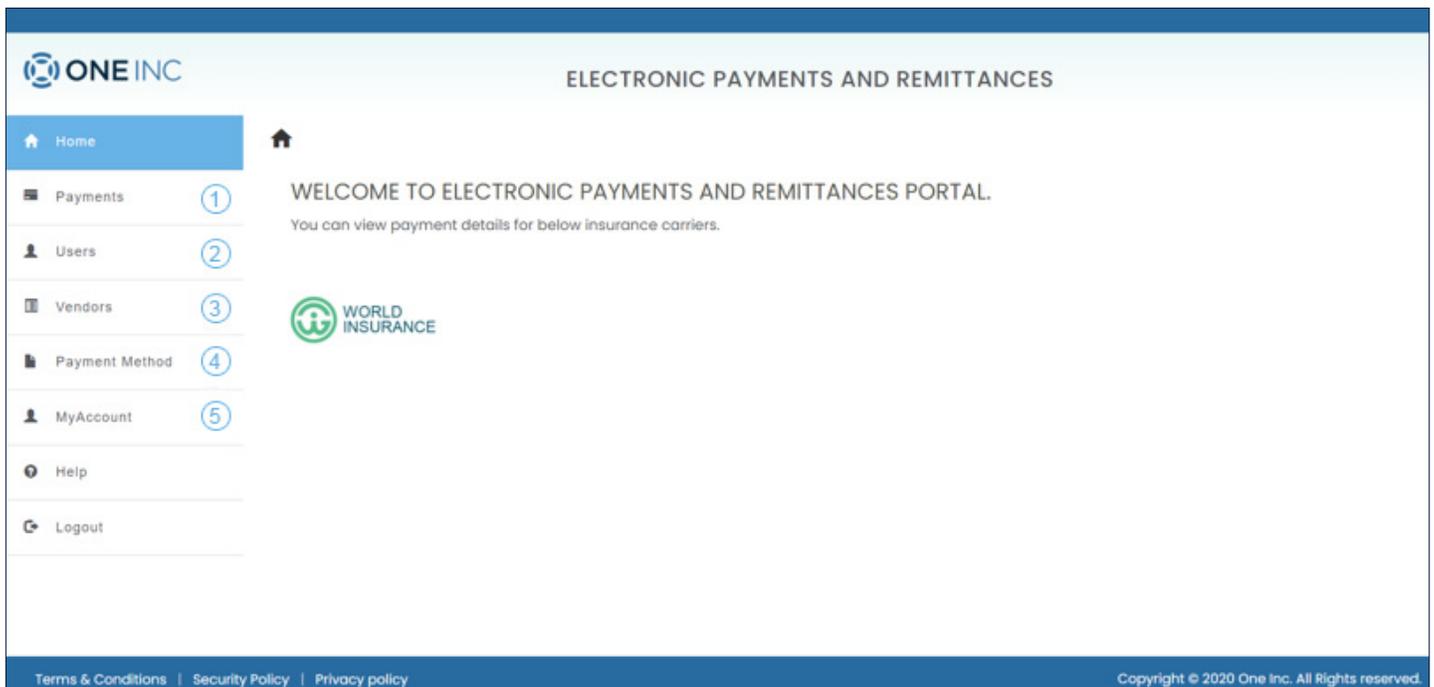


# Home Page

Once you log in, the home page will be displayed. The page will contain tabs on the left, as shown below. You can navigate to:

1. **Payments Lookup**
2. **User Management**
3. **Vendor Lists**
4. **Payment Preferences**
5. **Account Settings**

**Note:** You will notice on the home screen that all of the One Inc partnered insurance carriers that you receive payments from will appear.



# Payment Search

To view historical payment details you can navigate to click the **Payments** tab within the left panel of the home screen. There you will have two options to choose from:

1. **Payment Search by Batch**
2. **Advanced Payment Search**

## Payment Search by Batch:

The purpose of this report is to allow you to quickly find a payment that would have occurred in the past. If you belong to multiple clients and a multi-shop organization and have access to view remittance details for all your shops, you can choose to filter this by selecting **Client Name** and **Vendor Name**.

1. For particular client / vendor data - Select **Client** from the **Client** drop down menu. Similarly select the **Vendor** from **Vendor** List and perform the search operation.
2. You can click on **EFT / Check #** within the **Remittance Summary** table to view remittance details corresponding to the **EFT / Check#**.

The screenshot displays the ONE INC web application interface for 'ELECTRONIC PAYMENTS AND REMITTANCES'. The left sidebar contains navigation options: Home, Payments (with a dropdown arrow), By Batch (highlighted in blue), Advanced Search, Users, Vendors, Payment Method, MyAccount (with a dropdown arrow), Change Password, and User Profile. The main content area shows a breadcrumb trail 'Home > Remittance Summary' and a search form titled 'SEARCH'. The search form includes a 'Home Page' link, a search input field, and several filter fields: 'Client' (with a circled '1' and a dropdown arrow), 'Vendor Name' (with a dropdown arrow), 'EFT/Check#' (with a circled '2' and a calendar icon), 'From Date' (with a calendar icon), and 'To Date' (with a calendar icon). Below the filters are two buttons: a blue 'SEARCH' button and a red 'RESET' button.

## Advanced Payment Search:

Depending on the number of payments you receive, or the payment details you have on hand to search with, you may need to use the **Advanced Payment Search**. This search includes all of the search criteria in the **Basic Search**, plus the ability to sort by **Customer Name** and **Amount**.

The screenshot shows the 'Advanced Search' page in the ONE INC system. The page title is 'ELECTRONIC PAYMENTS AND REMITTANCES'. The search form is titled 'SEARCH' and contains the following fields:

- Client (dropdown)
- Vendor Name (dropdown)
- EFT/Check# (text input)
- Claim Number (text input)
- Customer Name (text input)
- Amount (text input)
- From Date (calendar icon)
- To Date (calendar icon)

There are two buttons: a blue 'SEARCH' button and a red 'RESET' button.

## Reviewing Payments

Once you have set your search criteria fields and clicked submit, payment details will appear. You can also download the results in the form of an excel file by clicking on **Download to CSV** link. Use the search fields again to refine your results if needed. If payments are not found, the message **"No Records Found"** will be displayed.

The screenshot shows the 'Advanced Search' page with search results. The search criteria are filled out as follows:

- Client: World Insurance
- Vendor Name: (empty)
- EFT/Check#: (empty)
- Claim Number: (empty)
- Customer Name: (empty)
- Amount: (empty)
- From Date: (empty)
- To Date: (empty)

There is a blue 'DOWNLOAD TO CSV' button. The results table is as follows:

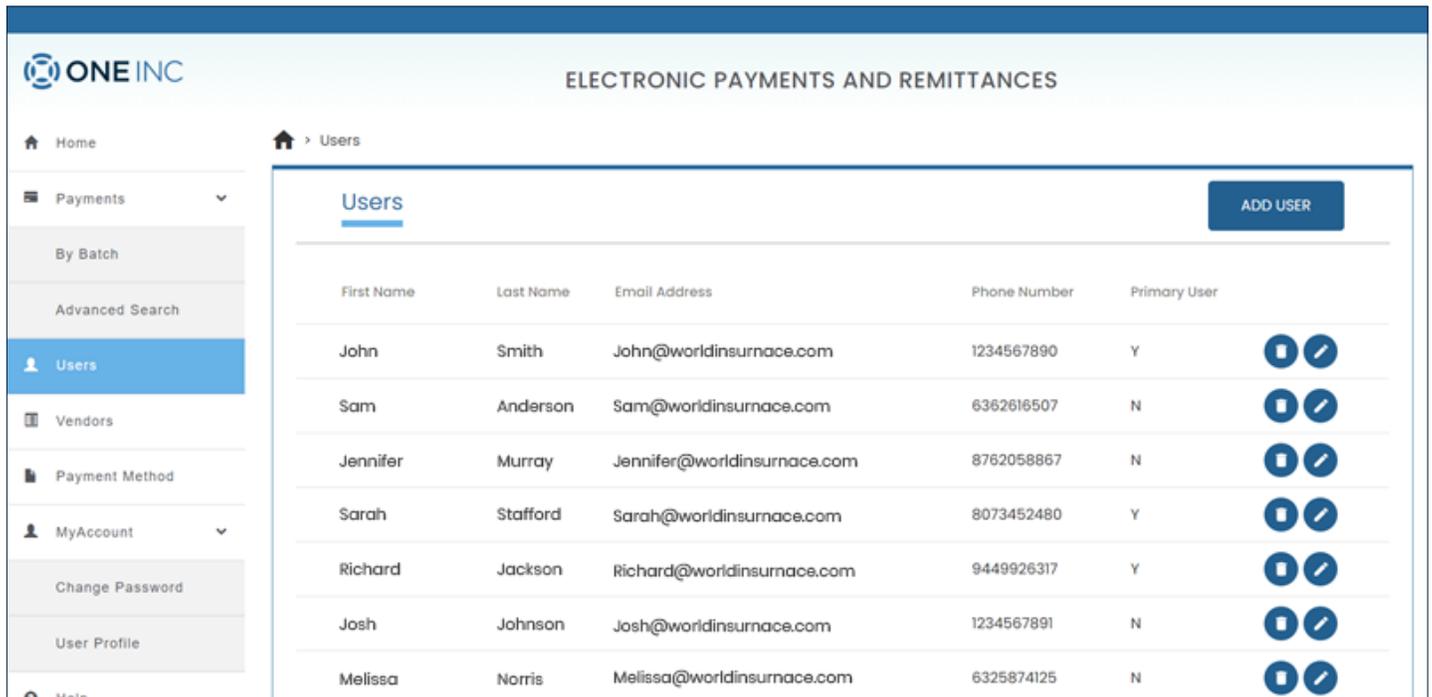
Org Name	EFT / Check #	Issued Date	Invoice No	Claim No	Customer Name	Amount	Status
Enterprise Rental Vendor of California	10000289	2021-01-07	No-123456789	CL7259068775	Jr.Smith David	\$1.00	Issued
Enterprise Rental Vendor of NewYork	10000288	2021-01-07	V1-1241021	CL050120211420	Not available	\$143.00	Issued

# User Management

Navigate to the **Users** tab to review and manage the users associated with your organization.

From this page you can view the users, remove them, or edit them.

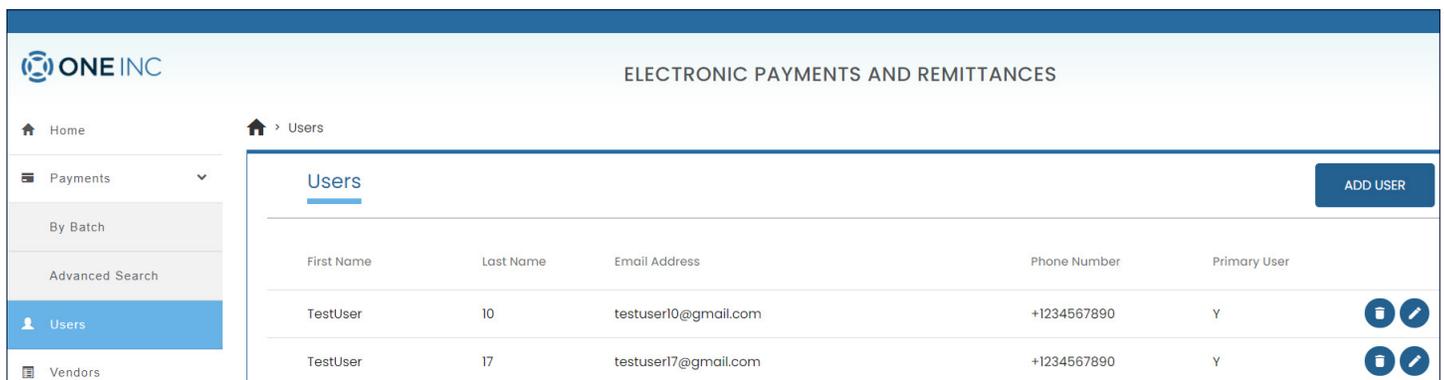
1. The data column **Primary User** indicates whether the user is an administrator for the organization and can add, edit, or remove users.
2. If the user is not a **Primary User**, (indicated with the value "N") they will only be able to view the users and cannot add, edit, or delete any users



The screenshot shows the ONE INC interface for managing users. The page title is "ELECTRONIC PAYMENTS AND REMITTANCES". The left sidebar contains navigation options: Home, Payments (with sub-options: By Batch, Advanced Search), Users (selected), Vendors, Payment Method, MyAccount (with sub-options: Change Password, User Profile), and Help. The main content area is titled "Users" and includes an "ADD USER" button. Below the title is a table with the following columns: First Name, Last Name, Email Address, Phone Number, Primary User, and two action icons (trash and edit).

First Name	Last Name	Email Address	Phone Number	Primary User	
John	Smith	John@worldinsurnace.com	1234567890	Y	
Sam	Anderson	Sam@worldinsurnace.com	6362616507	N	
Jennifer	Murray	Jennifer@worldinsurnace.com	8762058867	N	
Sarah	Stafford	Sarah@worldinsurnace.com	8073452480	Y	
Richard	Jackson	Richard@worldinsurnace.com	9449926317	Y	
Josh	Johnson	Josh@worldinsurnace.com	1234567891	N	
Melissa	Norris	Melissa@worldinsurnace.com	6325874125	N	

Once you have selected to edit a particular user from the user list, you will be navigated to a page, where you can again see the user's information and what vendors they are associated with.



The screenshot shows the ONE INC interface for managing users. The page title is "ELECTRONIC PAYMENTS AND REMITTANCES". The left sidebar contains navigation options: Home, Payments (with sub-options: By Batch, Advanced Search), Users (selected), Vendors, Payment Method, MyAccount (with sub-options: Change Password, User Profile), and Help. The main content area is titled "Users" and includes an "ADD USER" button. Below the title is a table with the following columns: First Name, Last Name, Email Address, Phone Number, Primary User, and two action icons (trash and edit).

First Name	Last Name	Email Address	Phone Number	Primary User	
TestUser	10	testuser10@gmail.com	+1234567890	Y	
TestUser	17	testuser17@gmail.com	+1234567890	Y	

# User Management (continued)

Once you select the edit button you will be navigated to the following page and you will be able to update the users account information.

If you click edit again you will be navigated to the following page where you will be able to edit contact details.

**ONE INC** ELECTRONIC PAYMENTS AND REMITTANCES

**USER PROFILE**

First Name: Test, Last Name: User12345, Email Address: testuser12345@gmail.com, Phone Number: Not available, Role: Manager

**ASSOCIATED VENDORS**

Client	Org Name	Address	City	State	Zipcode	
swyfft_test	Auto Rental Ltd	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_TEST	Auto Rental Ltd	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_TEST	Toyota Financial Services	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_STAGE	Bob & Jane Consulting	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_STAGE	B & B HARDWOOD FLOORING INC	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_STAGE	Auto Rental323 Ltd	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_STAGE	Auto Rental Ltd	Cochran Street	Simi Valley	CA	93603	
GUIDEONE_STAGE	Auto Rental Ltd	Cochran Street	Simi Valley	CA	93603	

**ONE INC** ELECTRONIC PAYMENTS AND REMITTANCES

Home > Users > Edit user

**CONTACT DETAILS**

Please add contact who you would like to have access to this portal

First Name: Iulia, Last Name: Abramova, Email Address: iabramova@oneinc.com, Phone Number: Not available

Enter with valid country code

**BACK** **NEXT**

# Associated Vendor List

Navigate to the **Vendor** tab to review all of the vendors associated with your organization. You may only have a single vendor, but if you have multiple locations or different vendors under your organization, then you will see multiple vendors.

The screenshot shows the ONE INC web interface. The main heading is 'ELECTRONIC PAYMENTS AND REMITTANCES'. Below this, there is a sub-heading 'ASSOCIATED VENDORS' and a table listing vendors. The table has two columns: 'Client' and 'Org Name'. The 'Client' column contains various test names like 'swyfft\_test', 'GUIDEONE\_TEST', and 'GUIDEONE\_STAGE'. The 'Org Name' column lists different organizations such as 'Auto Rental Ltd', 'Toyota Financial Services', and 'Bob & Jane Consulting'. A sidebar on the left contains navigation options like 'Payments', 'Users', 'Vendors', and 'Payment Method'. At the bottom of the page, there are links for 'Terms of Use' and 'Privacy Policy', and a copyright notice for 2021 One Inc.

ONE INC

ELECTRONIC PAYMENTS AND REMITTANCES

Here you can view the list of vendor records that you have access to by carrier. Please note that you may see multiple records with the same name and is driven by the data we receive from carriers.

### ASSOCIATED VENDORS

Client	Org Name
swyfft_test	Auto Rental Ltd
GUIDEONE_TEST	Auto Rental Ltd
GUIDEONE_TEST	Toyota Financial Services
GUIDEONE_STAGE	Bob & Jane Consulting
GUIDEONE_STAGE	B & B HARDWOOD FLOORING INC
GUIDEONE_STAGE	Auto Rental323 Ltd
GUIDEONE_STAGE	Auto Rental Ltd
GUIDEONE_STAGE	Auto Rental Ltd
GUIDEONE_STAGE	CUBATUBACO
GUIDEONE_STAGE	Auto Rental Ltd 1099

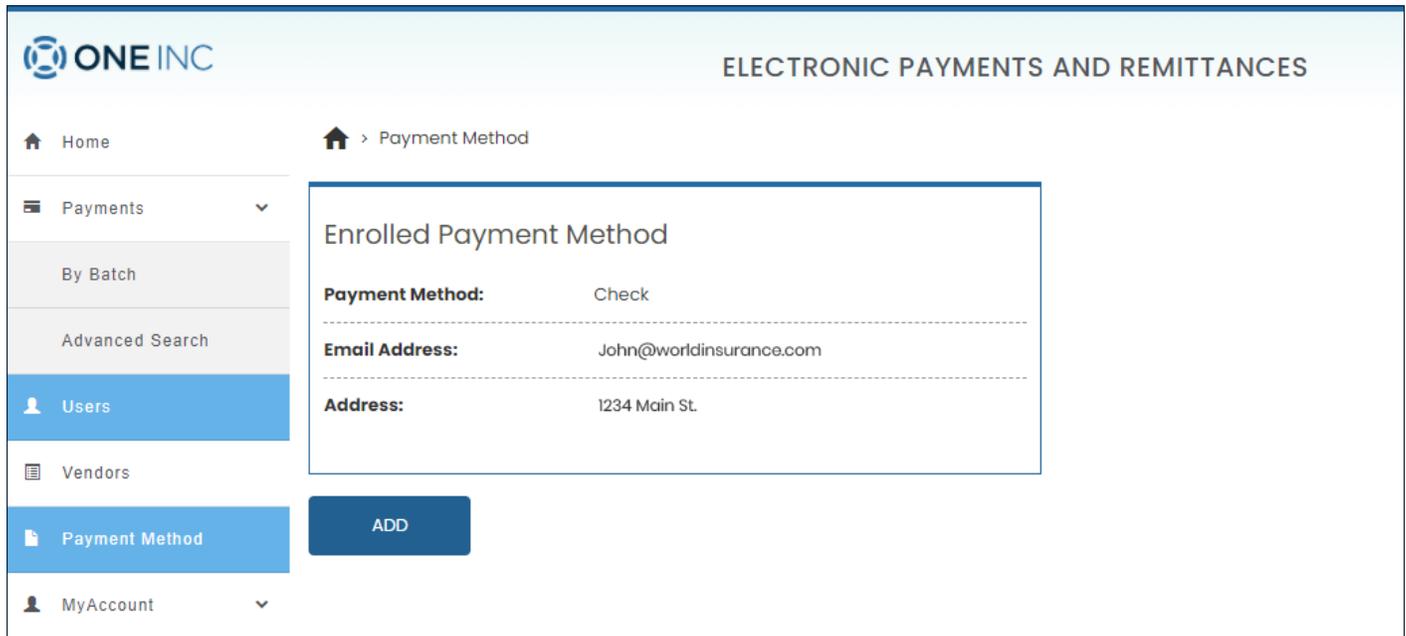
Items per page: 10 1 - 10 of 78

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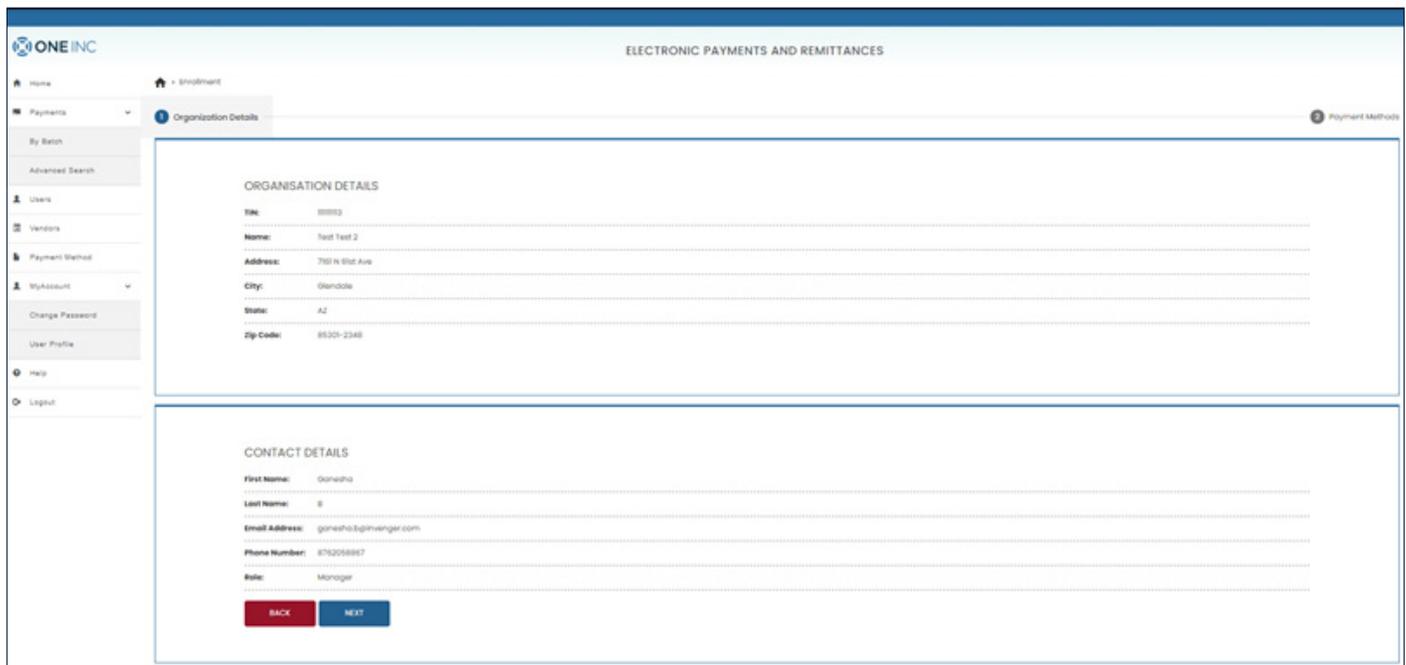
# Adding Payment Method

Express ClaimsCard® is a 16-digit, single-use virtual card that will be issued for each payment. By using Express ClaimsCard you eliminate the need for paper checks and receive faster payments while also reducing fraud risk.

You will see your payment preference once you navigate to the tab. To make an update, select the add button.



Once you click the **Add** button, you will be taken to the **Organization Details** page.



# Adding Payment Method (continued)

After selecting the **Next** button, you will be navigated to the following page which allows you to select your organizations new payment preference.

- Once you select a new payment method type, you will be prompted with a pop-up confirming that you are sure that you want to change your preference.

If you select the option that you are already enrolled in, you will be presented with a pop-up message stating **“You have already enrolled payment method as (payment method). Please select a different payment method.”**

The screenshot shows the 'ELECTRONIC PAYMENTS AND REMITTANCES' page. The left sidebar contains navigation options: Home, Payments (with a dropdown), Users, Vendors, Payment Method, MyAccount (with a dropdown), Change Password, and User Profile. The main content area has a progress bar with three steps: 1. Organization Details, 2. Payment Methods, and 3. Payment Method Details. Under 'Payment Methods', there are three options: Direct Deposit (Direct deposit in 1-2 business days), Virtual Card (Retrieve card and get paid within minutes), and Check (Mailed within 7-10 business days). A red 'BACK' button is visible at the bottom left.

## Virtual Card

If you select to be paid by **Express ClaimsCard**, you will first need to input your preferred email or fax number to have your **Express ClaimsCard** delivered to. Once entered, select the **Next** button.

The screenshot shows the 'ELECTRONIC PAYMENTS AND REMITTANCES' page, specifically the 'Payment Method Details' step. The left sidebar is the same as in the previous screenshot. The main content area has a progress bar with three steps: 1. Organization Details, 2. Payment Methods, and 3. Payment Method Details. Under 'Payment Method Details', there are two radio button options: Fax and Email Address (which is selected). Below the options is a text input field labeled 'Email Address' and two buttons: a red 'BACK' button and a blue 'NEXT' button.

# Payment Preference Authorization

After entering in your email or fax number, you will be redirected to the authorization page, where you will need to enter final pieces of data and a voided check scan.

ONE INC ELECTRONIC PAYMENTS AND REMITTANCES

Home Enrollment

Payments

1 Organization Details 2 Payment Methods 3 Payment Method Details 4 Authorization Information

The undersigned here by certifies that the information provided herein is true and accurate in all respects and that he/she has been duly authorized by all necessary and appropriate corporate action, where applicable, to execute this agreement on behalf of the above mentioned Organization Name to form a legally binding contract and understands that acceptance of this agreement constitutes agreement to be bound to perform in strict conformity with the Terms of Use of this agreement.

Name Title Date

REMITTANCE INFORMATION

Please provide email address to receive remittance information

Email

Documentation

Please upload below required documentation.

Upload Void Check Upload W9 (Optional)

BACK NEXT

# Bank Account

If you select to be paid by **Bank Transfer**, you will first need to indicate whether your account is a checking or savings account and then input your account and routing numbers. Once you have inputted your information, select the **Verify** button. If we cannot automatically verify your account we will request you submit a voided check to complete verification.

ONE INC ELECTRONIC PAYMENTS AND REMITTANCES

Home Enrollment

Payments

1 Organization Details 2 Payment Methods

Select Business Checking or Business Saving

Business Checking  Business Savings

Account Number Confirm Account Number

Routing Number Bank Name

BACK VERIFY

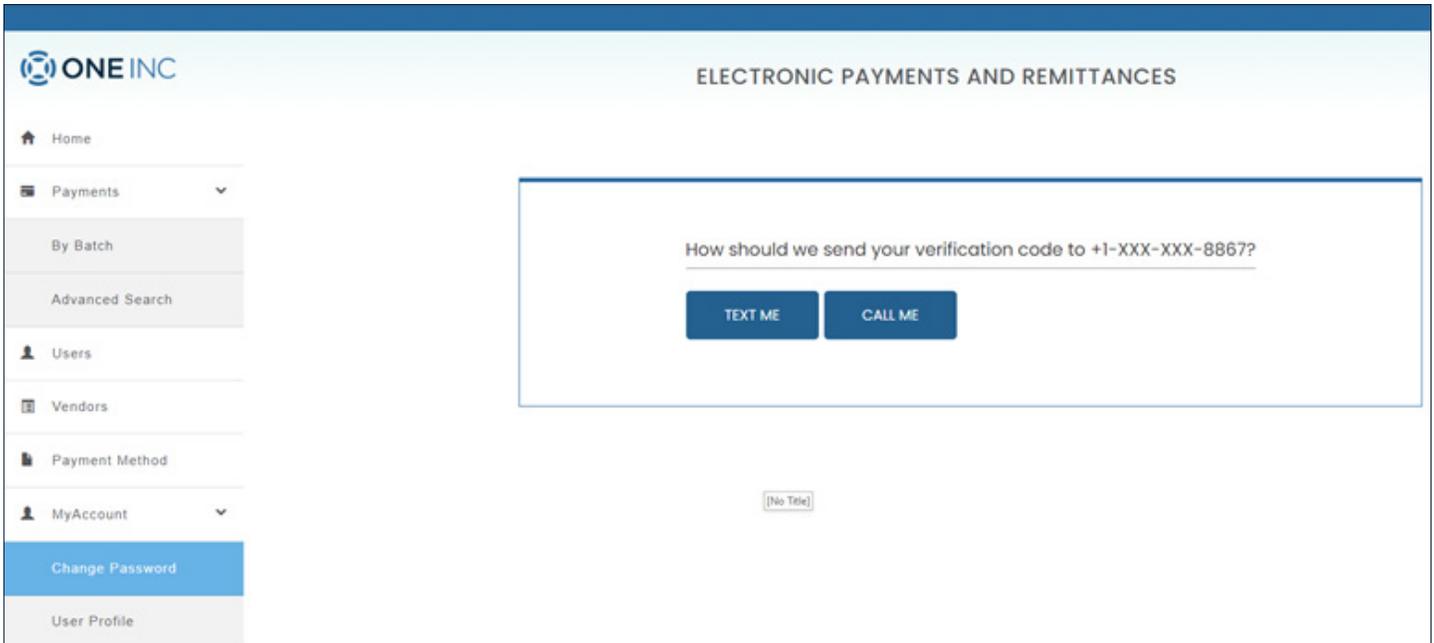
# Checks

If you select to be paid by check we will mail them to the address that we have on file. You will also need to submit a voided check to complete verification.

# My Account

## Change Password:

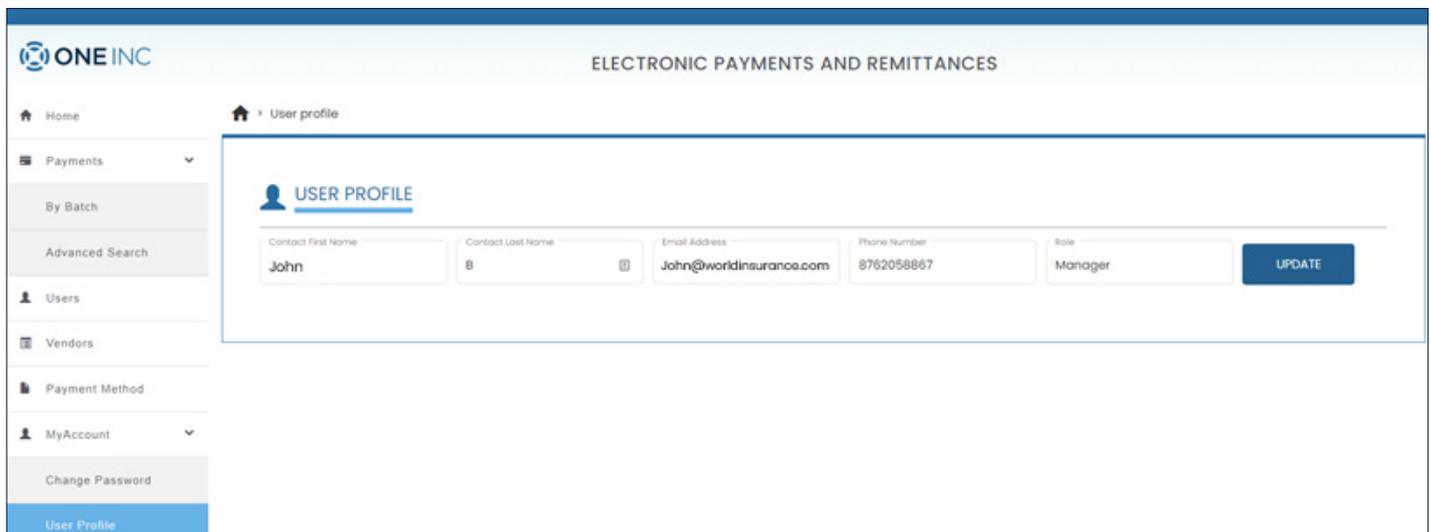
You can navigate to **Account Settings** tab and click on **Change Password** to update your password. The system will first send a verification text or call to your phone number on file, providing a code that will need to be entered.



The screenshot shows the ONE INC user interface. The top navigation bar includes the ONE INC logo and the title "ELECTRONIC PAYMENTS AND REMITTANCES". A left sidebar contains a menu with options: Home, Payments (with a dropdown arrow), By Batch, Advanced Search, Users, Vendors, Payment Method, MyAccount (with a dropdown arrow), Change Password (highlighted in blue), and User Profile. The main content area displays a verification prompt: "How should we send your verification code to +1-XXX-XXX-8867?". Below this prompt are two buttons: "TEXT ME" and "CALL ME". A "[No Title]" placeholder is visible below the buttons.

## Update Profile

If there are changes that need to be made your profile information, navigate to the **My Account** tab and then select **User Profile**. Once selected you will see the following input fields with your current profile information. Simply make the necessary updates to the appropriate profile fields and then select the **Update** button.



The screenshot shows the ONE INC user interface with the "User Profile" page selected. The top navigation bar includes the ONE INC logo and the title "ELECTRONIC PAYMENTS AND REMITTANCES". The left sidebar menu is the same as in the previous screenshot, but "User Profile" is now highlighted in blue. The main content area shows a breadcrumb "Home > User profile" and a "USER PROFILE" heading with a person icon. Below the heading are five input fields: "Contact First Name" (value: John), "Contact Last Name" (value: B), "Email Address" (value: John@worldinsurance.com), "Phone Number" (value: 8762058867), and "Role" (value: Manager). An "UPDATE" button is located to the right of the "Role" field.