

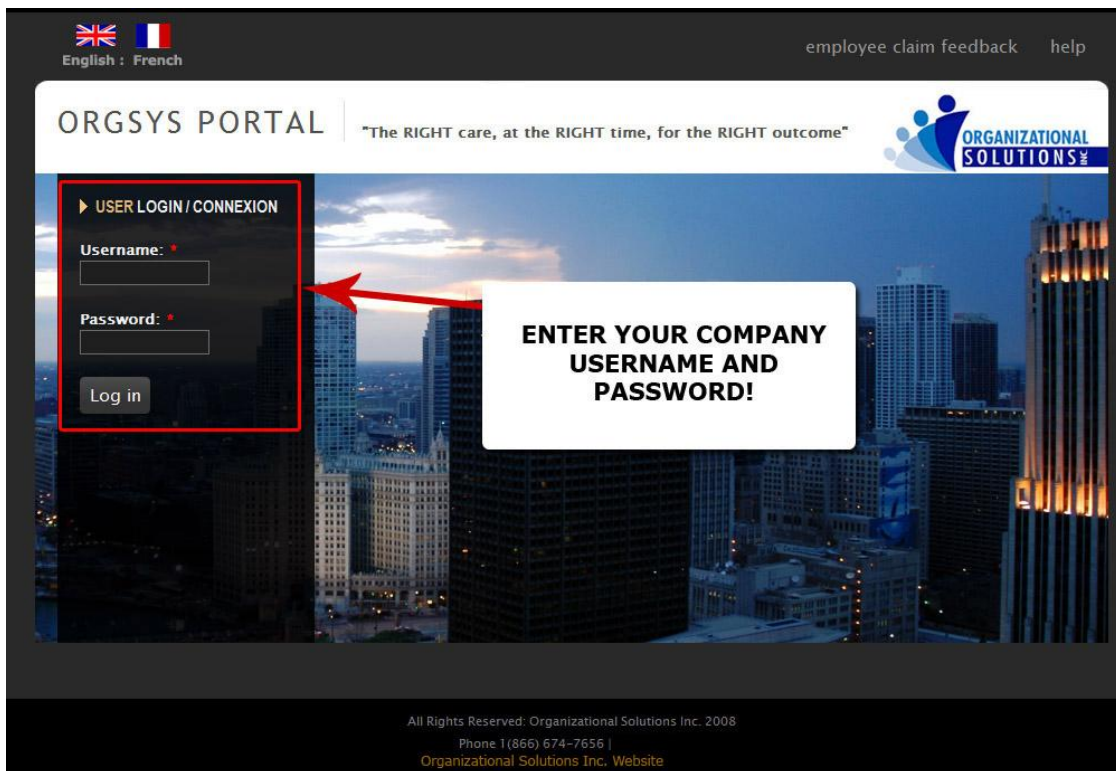


# Documentation on How to Use Organizational Solutions Inc.'s Client Portal

## How to login to the Portal:

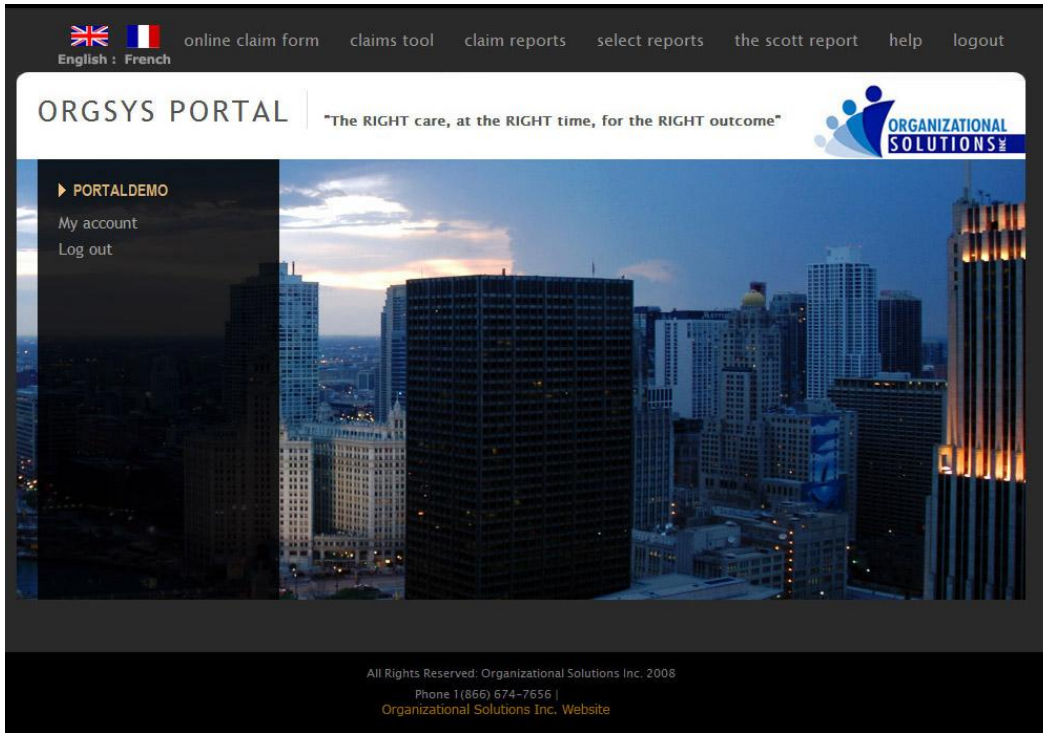
1. Using your internet browser, enter the following URL to access the Portal:  
<https://portal.orgsoln.com>

\*\*You will see the login screen for the Organizational Solutions Inc. Portal:





2. Enter your company username and password provided by Organizational Solutions Inc. and you will successfully log in to your personalized area of the portal.



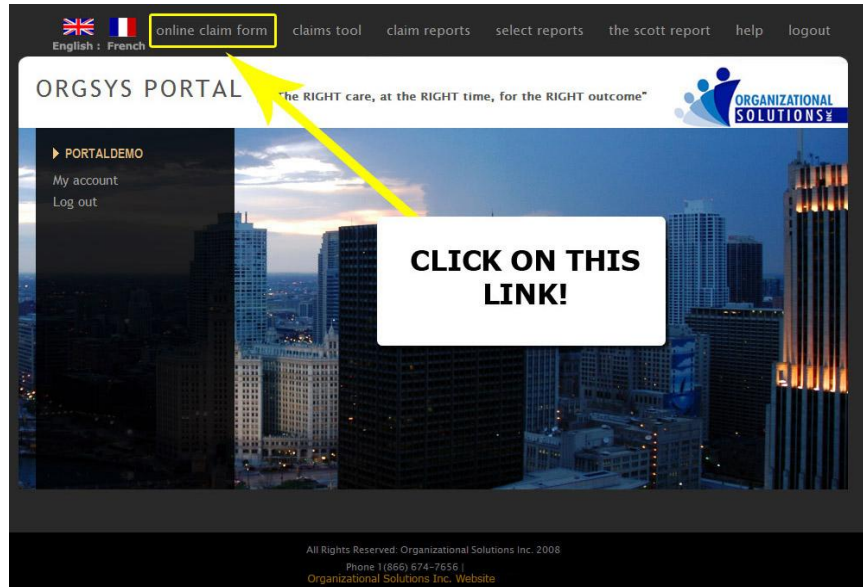
## SUBMITTING A CLAIM NOTIFICATION

### How to use the Online Claim Notification Form:

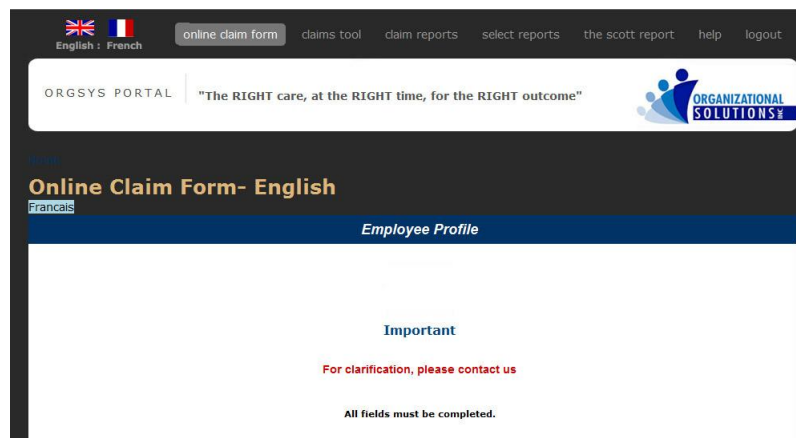
The claim form is accessible to any company logged in to the OrgSys Portal.

#### Accessing the Claim Form:

1. Click on the Menu link "on line claim form" on the top bar of your Portal



2. You have now accessed your on-line OrgSys Claim Form



3. Complete the Claim Form with the information to the best of your knowledge. Upon completing the claim form, press the **submit** button and the claim form will be forwarded to Organizational Solutions Inc. team members who will register and initiate your claim within 24 hours.  
Note: Aftersubmitting you will not be able to edit the information, so before submitting please review and ensure all information entered is correct. If you require, you may print the claim form before submitting.  
**\*\*If you want to see the status of the claim use the Claim Tool in the portal. You will only be able to use this feature if the tool has been purchased.**

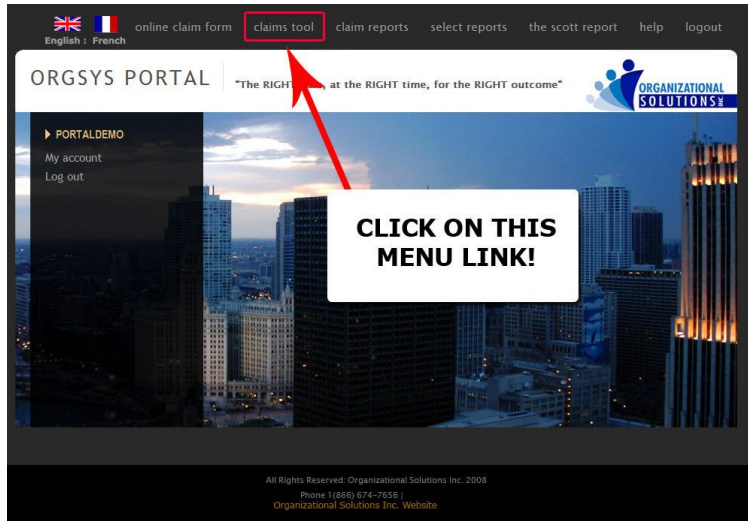
### How to use the Claim Tool:



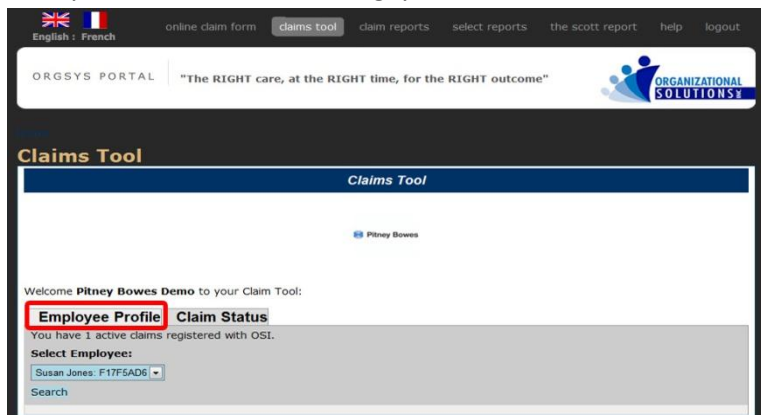
The claim tool option allows you to view the status of claims in real-time. This tool is operational but is only available if access to this tool has been purchased. If you would like to purchase this tool, please contact Organizational Solutions Inc. by email at [sales@orgsoln.com](mailto:sales@orgsoln.com) or by phone to 1-866-674-7656

### Accessing the Claim Tool:

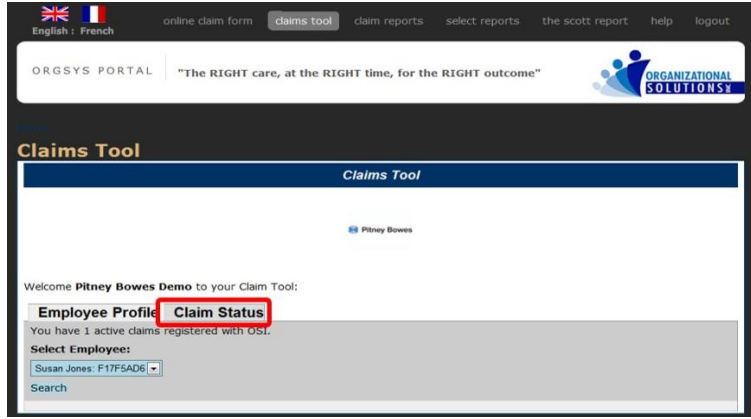
1. Click on the Menu Link, "Claims Tool."



2. Now you have accessed the OrgSys Claim Tool



3. Within the Claim Tool, there are 2 tabs, the Employee Profile and Claim Status.
  - a. The Employee Profile  
Under *Employee Profile*, you have the option to view any active claims for your employees.
  - b. Claim Status  
Under *Claim Status*, you can view the general information on each claim and see the current status of the claims.



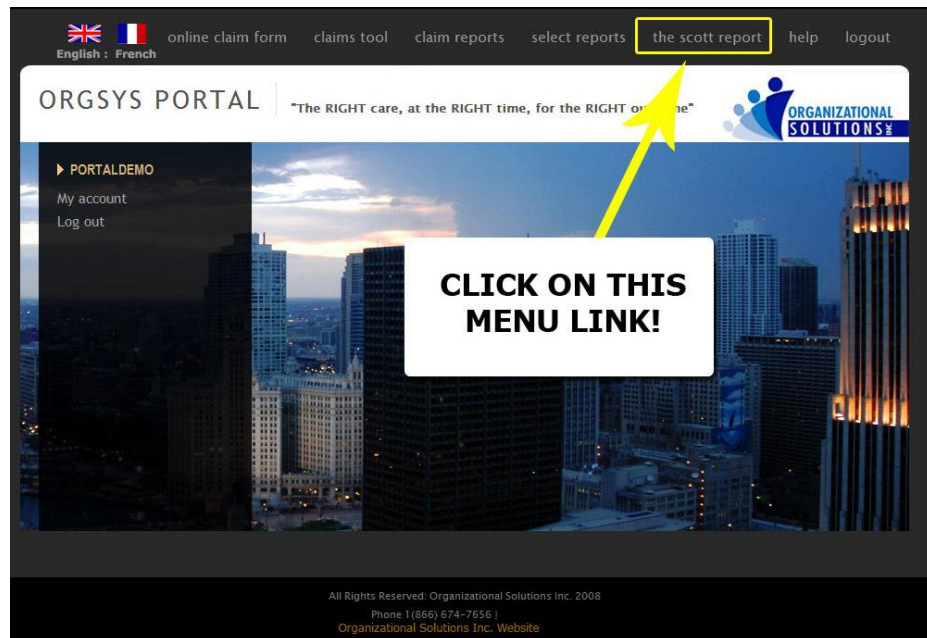
## Viewing the Scott Report:

The Scott Report is designed to keep you informed on up to date developments, research findings, and other information related to disability management, workers' compensation, and other occupational health topics of interest to you.

All "Scott Reports" on the portal are in a PDF format.

### Access to the Scott Report:

1. Click on the Menu Link, "The Scott Report."



2. Click download to view the PDFs.





## Viewing Update and Trend Reports

Soon you will be able to generate reports on demand directly from the Orgsys portal.

Reports will include:

Weekly Reports

Claim Summaries

Monthly Reports

Payroll Reports (if you use our pay feature)

Aggregate

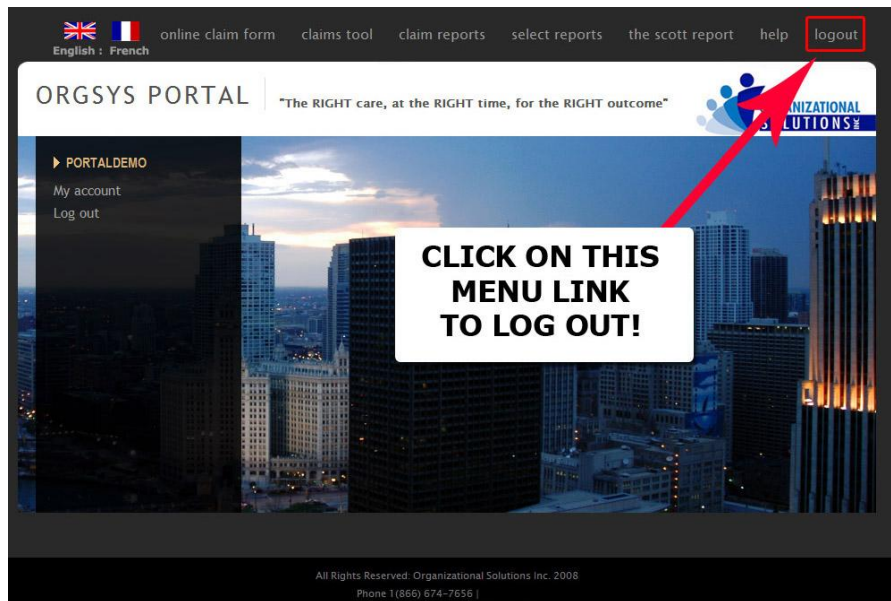
Annual

Data

More details coming soon.

## Logging out of the Portal

Click the Menu Link “Log out” to exit the OrgSys Portal:



Thank you for reading this documentation on “**How to use the OrgSys Portal**”.

Should you have any questions or comments please contact Organizational Solutions Inc. at 1-866-org-soln