Understanding What You See in HCAI
Table of Contents

Contents

**Understanding What You See in HCAI** .................................................................................................................. 3

Set Home page ............................................................................................................................................................ 3

Global Tabs and Sub-Tabs ...................................................................................................................................... 4

Global Tabs ................................................................................................................................................................... 4

  Plans ............................................................................................................................................................................ 4

  Invoices ...................................................................................................................................................................... 5

  Search ......................................................................................................................................................................... 5

  Manage ...................................................................................................................................................................... 5

Sub-tabs ......................................................................................................................................................................... 5

  Work in Progress .................................................................................................................................................... 5

  Adjuster Response ................................................................................................................................................. 5

  Draft ............................................................................................................................................................................ 6

HCAI Filters ................................................................................................................................................................... 6

General Buttons and Links in HCAI ...................................................................................................................... 7

Calendar Function ...................................................................................................................................................... 8
This manual is intended to assist users in using the HCAI application by outlining the system interface and describing the various tabs and sub-tabs.

**Set Home page**

The Plans tab is by default the first screen that Health Care Facility Users will see upon logging in to HCAI. At the bottom left of the page is a checkbox that says ‘Set as home page’. This checkbox appears on every global tab and sub-tab in HCAI.

Navigate to the tab you would like to see first upon logging in to HCAI, and check the ‘Set as home page’ checkbox. HCAI will save your preference and every subsequent login will bring you immediately to your preferred home page. The preferred home page can be changed at any time.
Global Tabs and Sub-Tabs

Global Tabs

In HCAI, there are four main global tabs: Plans, Invoices, Search and Manage. Within each global tab there are sub-tabs that provide information or allow for various functions. The global tab you are in will be highlighted in green. To move to another tab, simply click on that tab.

Plans

This tab is the first tab you will see on the Facility homepage in HCAI. Within this tab there are three sub-tabs: Work in Progress, Adjuster Response, and Draft. All the worklists and functions within this tab are related to OCF-18, OCF-23, and Form 1.
**Invoices**

This is the main navigation tab for the *Invoices* worklists. Within this tab you will see three sub-tabs: *Work in Progress*, *Adjuster Response*, and *Draft*. All the worklists and functions within this tab are related to OCF-21B and OCF-21C.

**Search**

Within the *Search* tab there is one sub-tab: *Document Search*. This section allows you to search for all OCFs by entering various search criteria. In order to view the *Document Search* sub-tab, you must first select the *Search* global tab.

**Manage**

This is the main navigation tab for accessing reports, managing your Facility and updating User information. Within this tab you will see three sub-tabs: *User Management*, *Reports* and *Facility Management*. In order to view any of the three sub-tabs, you must first select the *Manage* global tab.

**Sub-tabs**

The *Plans* and *Invoices* global tabs each have four identical sub-tabs. The sub-tab that you are in will be marked with yellow font. To view any of these sub-tabs, you must first select the *Plans* or *Invoices* global tab.

**Work in Progress**

This sub-tab displays all the forms that have been submitted to Insurers.

**Adjuster Response**

This sub-tab displays all the forms that have been adjudicated by the Insurers.
This sub-tab displays all the forms that have been saved by a Health Care Facility. Documents in this section can be reopened, then completed, edited or deleted.

HCAI Filters

Throughout HCAI, there are drop-down menus that allow you to modify your lists. Click on the drop-down menu to view or create specific OCFs or to display more or less items in a worklist.
## General Buttons and Links in HCAI

<table>
<thead>
<tr>
<th>Button/Link</th>
<th>How it Looks</th>
<th>What it Does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New</td>
<td><img src="create.png" alt="CREATE NEW" /></td>
<td>Generates a blank copy of a selected OCF.</td>
</tr>
<tr>
<td>Delete</td>
<td><img src="delete.png" alt="DELETE" /></td>
<td>Deletes unwanted forms in the Drafts sub-tab. Check the box next to a form and hit “Delete” to remove that form from your list.</td>
</tr>
<tr>
<td>Go</td>
<td><img src="go.png" alt="GO" /></td>
<td>Type a patient’s last name into the field provided and click this button to retrieve a list of patients with that last name.</td>
</tr>
<tr>
<td>Review Form</td>
<td><img src="review.png" alt="Review Form" /></td>
<td>Allows you to view the details of a form.</td>
</tr>
<tr>
<td>Search</td>
<td><img src="search.png" alt="SEARCH" /></td>
<td>Provides a similar function to the “Go” button. Fill in the search criteria and click this button to generate a list.</td>
</tr>
<tr>
<td>Advanced Search</td>
<td><img src="advanced.png" alt="Advanced" /></td>
<td>Provides a detailed search screen where you can quickly find a specific OCF.</td>
</tr>
<tr>
<td>Add New User</td>
<td><img src="add.png" alt="ADD NEW USER" /></td>
<td>Takes the User to the “Add/Edit/View User Details” screen to add new HCAI users for your Facility.</td>
</tr>
<tr>
<td>User Manual</td>
<td><img src="user.png" alt="User Manual" /></td>
<td>Opens a separate window that takes you to the Facility Web User Manual on HCAIinfo.ca.</td>
</tr>
<tr>
<td>Logout</td>
<td><img src="logout.png" alt="LOGOUT" /></td>
<td>Formally ends your session in HCAI and logs out your credentials (recommended). When a User logs out this way, HCAI will remember the order of the User’s worklists.</td>
</tr>
<tr>
<td>Page Links</td>
<td><img src="page.png" alt="Page Links" /></td>
<td>Allows you to select other pages and displays the number of pages available. The page being currently viewed will be in bold. Click “Next” to move to the following page or click on a page number to go to that page.</td>
</tr>
<tr>
<td>Exact Match</td>
<td><img src="exact.png" alt="Exact Match" /></td>
<td>When checked, generates patient or form search results identical to the criteria entered. By default, the Exact Match function is checked.</td>
</tr>
<tr>
<td>Save</td>
<td><img src="save.png" alt="SAVE" /></td>
<td>Keeps changes made to information on HCAI. If the “Save” button is not clicked, any changes made will be deleted.</td>
</tr>
<tr>
<td>Number of items (forms) displayed per page</td>
<td><img src="items.png" alt="Number of items" /></td>
<td>Increase or decrease the number of items or forms listed on each page.</td>
</tr>
</tbody>
</table>
**Calendar Function**

Use the calendar function to specify a date range when searching for OCFs and reports or to enter dates when filling out forms.

Click 📅 to view the current month and date (highlighted in yellow). To select a different month, use the navigation arrows located on the top left and right corners of the calendar and click on the date. To enter in today’s date, place your cursor in the field and hit CTRL-T from your keyboard.

Example of how the calendar function appears in HCAI.