

## Did you know?

This bulletin is being sent to all health care facilities (businesses/practices/clinics) that are already using HCAI. If you have a question, please direct it to [providersupport@hcaiinfo.ca](mailto:providersupport@hcaiinfo.ca).

## Tips: Managing Providers

### Remember:

- A **provider** is any individual that will deliver health care goods and/or services to patients of your health care facility.
  - A provider may or may NOT be a **user**, depending on whether a user profile has been assigned to that provider..
- A **user** is someone at your health care business that has been assigned a username and password by the **Authorizing Officer** or **Facility User Administrator** so they can access the HCAI application.
  - Each user is assigned certain roles they can perform within the HCAI application. These roles are described in Chapter 3 of the online user manual
  - A user may or may not be a provider.

### To add a provider:

1. The only persons at health care facilities that can add or change providers is someone who has been assigned a user profile that includes the **Facility Administrator role**.
  - a. The staff at HCAI Processing do NOT have access to make any changes to your facility information or associated provider list.
2. Log onto HCAI
3. Click on the words “*User Manual*” at the top right of the HCAI screen (this appears on every page)
4. Refer to Ch 3, “*Add and Remove a Provider*”.
5. Follow the instructions
6. Remember to obtain the the provider’s signature on a provider terms and conditions form and keeping it on record at your clinic. You do **not** fax it to HCAI.

### What is the Provider Terms and Conditions Form?

Each provider that is associated with your facility must provide written acknowledgement that they are associated with your practice. There are two kinds of providers:

1. Providers that do not have a user profile (dependent providers); and
  - Dependent Providers should sign the form called “Dependent Providers Form”
2. Providers that have been given a user profile to enable them to log onto the HCAI Web application (Affiliated Provider).
  - Affiliated Providers should sign the form called “Affiliated Providers Form”

Both forms are available at [www.hcaiinfo.ca](http://www.hcaiinfo.ca) on the [Enrolment](#) pages found at the [Web](#), [Practice Management Software](#), and [HCAI Data Entry Centre](#) access portals. Just click on the form's name and you can download them to your computer.

**IMPORTANT:** The signature of the provider on these forms does NOT authorize the health care facility to apply the provider's signature to any OCF. OCF signatures require the health care practitioner or regulated health professional to sign EACH OCF 18, 22 or 23. The signed OCF must be kept in the patient record for audit purposes.

## Which Providers Show up in Which Dropdown Lists?

All providers will appear in the dropdown lists as follows:

- OCF 18 – Part 12;
- OCF 21B/C – Reimbursable Goods and Services;
- OCF 22 – Part 7
- OCF 23 – Part 11

However, only the following providers will appear in certain dropdown lists as follows:

- OCF 18 – Part 5 – Health practitioners only (as defined in the SABS)
- OCF 18 – Part 6 – Regulated health professionals only
- OCF 22 – Part 3 – Regulated health professional
- OCF 23 – Part 5 – Health practitioners only (as defined in the SABS)

You may also wish to review the OCF User Manuals that explain this further. To review the HCAI Web User Manual, go to:

[http://www.hcaiinfo.ca/Health\\_Care\\_Facility\\_Provider/HCAI\\_Web\\_User\\_Manual.asp](http://www.hcaiinfo.ca/Health_Care_Facility_Provider/HCAI_Web_User_Manual.asp)

## Learn Some Shortcuts

Don't forget to take a look at the training videos available at [www.hcaiinfo.ca](http://www.hcaiinfo.ca), in either the [Facility Management](#) or [Working with OCF Forms](#) section of the website.

In particular, valuable shortcuts for plan and invoice preparation can be seen in the following videos:

- [Create an Invoice from an Adjudicated Plan \(like an OCF 21A\)](#)
- [Apply One Provider to Several Lines of Goods and Services](#)
- [Creating Session Codes in HCAI](#)