

CHAPTER 3

Managing the Facility, Providers and Users

Log In for the First Time

This chapter should be used once the facility has registered and is ready to start using HCAI. This chapter describes the process for setting up your health care facility (HCF) to function effectively within the HCAI system.

Authorizing Officer Receives Temporary Password

The Authorizing Officer (AO) will have received a temporary password when he or she first registered the facility.

IMPORTANT: To ensure compliance with **provincial privacy requirements**, this username and password should **not** be shared with anyone. The username should be recorded in a safe place. This information is required if the Authorizing Officer requires a password reset. Refer to Chapter 1 to review issues that pertain to your practice's privacy.

This username and password will be required to log on to HCAI and organize your electronic facility.

Delegating Responsibility of the Authorizing Officer

- In some cases, an owner or executive of a practice may complete the registration process, but may not want to be engaged in the day-to-day operation of HCAI.
- In this case, **the AO who registered should not share his or her password.**
- Instead, s/he should create a new user with full permission to perform any action in the electronic facility. See "Set Up Users for the First Time After Your Facility Is Activated."

Manage and Change Facility Details if Required

When the practice was first registered, the AO completed all facility details. However, from time to time, these details may change. Please read the instructions below carefully for changing facility details.

The AO is responsible for the following tasks:

- Completing and signing a Name Change Form if the HCF intends to change its legal name.
- Assigning new users who can manage the facility in HCAI.
- Deregistering herself or himself if s/he decides to leave a practice and also ensuring a new AO is assigned and registered.

Do You Need to Change the Authorizing Officer (AO) in Your HCAI Facility?

Read this section carefully before you start the process.

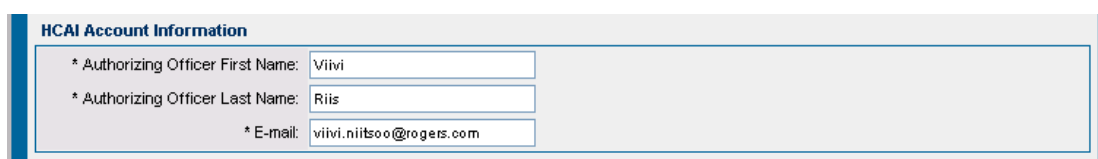
- When you change the name of the AO in HCAI, the contract signed by the previous AO is invalidated.
- As a result, the facility will be deactivated and will be unable to submit forms until a new contract, signed by the new AO, is received by HCAI.
 - **Note:** Even changing the spelling of the AO's name will constitute a "name change" and will invalidate the contract.
- Consider carefully if there is truly a need to change the AO; in many cases, simply creating a new user profile may suffice.

Deciding if the Authorizing Officer Needs to Change

Situation	Requires Change in AO?	Comments
AO is leaving the practice to go to another practice	Yes	Follow instructions under “Change the Authorizing Officer”
AO wishes to delegate facility management tasks to another person in the practice	No	Follow instructions under “Set Up Users for the First Time.” Set up a delegate with facility-level access and permission to perform all roles (including facility User Administrator)

Change the Authorizing Officer

Figure 3.1: Changing the AO



HCAI Account Information

* Authorizing Officer First Name:

* Authorizing Officer Last Name:

* E-mail:

Who	<p>Only the AO or users with Facility Administrator (FA) permissions may change the name of the AO.</p> <p>Note: Prior to changing the name of the Authorizing Officer in your system, make sure you set up a user profile for the new AO with all facility and provider roles (permissions).</p>
How	<p>There will be a 24-hour period after changing the AO's name during which your clinic will be unable to submit forms. Plan your change process carefully.</p> <ol style="list-style-type: none"> 1. Log on to hcai.ca. 2. Scroll to the HCAI Account Information section. 3. Insert the name of the new AO (or the correct name of the existing AO). 4. If necessary, change the email address. 5. Click SAVE. 6. A notice will appear: “Facility details successfully updated. A new enrollment form must be submitted before the facility can be approved.” 7. <u>Note</u>: When the AO name is changed, the facility will be “not approved” and unable to submit forms. 8. The new AO must download the registration details by clicking DOWNLOAD REGISTRATION DETAILS. 9. Print the new enrollment form. The new AO must sign it. 10. Fax or email the signed form to 416-644-3139 or email it to providersupport@hcaiinfo.ca. 11. After the form is received during the business week, the facility will be reactivated in 24 hours. To determine if your clinic is in the approved state, just log on.

Correct the Spelling of the Authorizing Officer's Name

The same process must be used when a new AO is assigned. Follow steps #1 to #10 above.

Change the Name of a Facility

If you plan to change the legal name of an existing facility that is enrolled with HCAI, the signature of the AO is required to revalidate the HCAI Terms and Conditions contract.

Who	Only the AO or users with Facility Administrator permissions may change facility details including contact information.
How	<p>Important: Do not change the name of your facility on the HCAI Web application prior to completing steps #1 to #3.</p> <ol style="list-style-type: none"> 1. Go to www.hcaiinfo.ca and complete the Facility Name Change Form. 2. Fax the completed form to 416-644-3139 or email it to providersupport@hcaiinfo.ca. 3. Once the Financial Services Commission of Ontario (FSCO) has published the new facility name in the Guidelines, your Facility Administrator must log in and change the facility name in the Facility Management tab of HCAI. <p>All forms submitted by your facility will now be populated with the new facility name.</p>

Important notice: Do *not* change the name of your facility on the HCAI Web application until your facility name has been published in the FSCO HCAI Participant List. Insurers are not required to respond or pay invoices to facilities not named in the Participant List.

Figure 3.2: Facility Management Screen

The screenshot shows the HCAI web application interface. At the top, there are navigation tabs: PLANS, INVOICES, SEARCH, and MANAGE. The MANAGE tab is active. Below the navigation is a search bar for Patient Last Name and a dropdown for All Forms. The main content area is titled 'FACILITY MANAGEMENT' and contains a section for changing the facility name. The section includes instructions and a form with the following fields:

Status:	Approved	* Facility Start Date:	2009/04/17
Facility Number:	12676	Facility End Date:	<input type="text"/>
* Facility Name:	<input type="text" value="fac_test"/>	AISI Facility Number:	<input type="text"/>
Corporation Number:	<input type="text" value="fac_test"/>	* Telephone:	(416) 234-2345 x2345
* Address Line 1:	<input type="text" value="fac_test"/>	Fax:	<input type="text"/>
Address Line 2:	<input type="text" value="fac_test"/>		
* City:	<input type="text" value="fac_test"/>		
* Province:	ON - Ontario		
* Postal Code:	<input type="text" value="m3m3m3"/>		


Change the Details (name, email address) of Facility Contact Personnel

Figure 3.3: Contact One and Contact Two Details

The screenshot shows the contact details for two facility contacts. The form is divided into two sections: Contact One and Contact Two.

Contact One	Contact Two
* First Name: <input type="text" value="Mary"/>	First Name: <input type="text" value="Mary"/>
* Last Name: <input type="text" value="Smith"/>	Last Name: <input type="text" value="Smith"/>
* Title: <input type="text" value="Owner"/>	Title: <input type="text"/>
E-Mail: <input type="text"/>	E-Mail: <input type="text" value="vriis@ibc.ca"/>
* Telephone: <input type="text" value="(416) 656-6565"/>	Telephone: <input type="text"/>

Source: Health Claims for Auto Insurance Processing

Who	Only the AO or users with the Facility Administrator role and permissions may change facility details including contact information.
How	<ol style="list-style-type: none"> 1. Log on to www.hcai.ca. 2. Go to the Manage tab and Facility Management sub-tab. 3. Scroll down to the Contact One and Contact Two fields. 4. Make the required changes to the fields shown in the figure above. 5. Click .

Change Submission Method from Web to PMS or from PMS to Web

- 1.) Log into the HCAI website and navigate to the Manage tab.
- 2.) Under the “HCAI Submission Method” section, select Yes. In the field “PMS Vendor” type in the name of your vendor.
- 3.) Select a username (it will have to be unique) and HCAI will issue the password for you to give to your vendor/software developer, once you save/submit the information.

Change Submission Method from PMS to Web

- 1.) Log into the HCAI website and navigate to the Manage tab.
- 2.) Under the “HCAI Submission Method” section, select No.
- 3.) Save/submit the information.

De-register a Facility that Is No Longer in Operation or Has Closed

1. If a facility closes or otherwise has decided to stop providing services, the facility must be de-registered.
 - a. Prior to de-registering a facility, all users must be deactivated. In order to deactivate users, refer to the section “Deactivate a User.”

Who	Only the AO or users with Facility Administrator permissions may de-register an HCF.
How	<ol style="list-style-type: none"> 1. Log on to hcai.ca. 2. Select the Manage tab, then select the Facility Management tab. 3. In Facility Details, insert the last day on which the facility will operate in the “Facility End Date” field. 4. Press <Submit>, review changes and press <Submit> again. 5. Press <Cancel> to exit the screen.

Add and Remove a Provider

What Is a Provider and How Is it Different from a User?

- When a facility first registers/enrolls, it will associate at least one health care provider with the facility.
- But health providers fluctuate as staff are hired or leave the facility.
- New providers should be associated with the facility and providers who leave should be removed (disassociated) as a provider.

IMPORTANT: If a provider leaves the facility, his or her name should be removed from the list of associated providers. It is fraudulent for a provider to continue to propose services or invoice for services on dates after the provider's last date of service with the facility.

- The list of providers associated with a facility must be maintained by someone with Facility Manager permission.

	Definition	HCAI Requirements	Resources
Facility	A health care practice/clinic or business. The “billing” entity that submits invoices to and receives payment from auto insurers. A facility may have one or more persons (providers) who will deliver care to patients.	All health care clinics/businesses/practices wishing to transact business with auto insurers must be registered as a facility with HCAI.	To learn how to register a facility, visit www.hcaiinfo.ca .
Associated provider	Any person who delivers health care services to patients at a particular facility is “associated” with that facility.	Providers must be registered or “associated” with any facility for which the provider delivers services. Providers may be associated with more than one facility. Association with a facility (as a provider) does not imply any particular compensation arrangement.	Each facility is responsible for adding the names of providers who deliver care to the facility’s patients. Providers should be removed from the facility’s provider list when the provider leaves the facility.
Dependent provider	An associated provider who does not have a user profile.	Provider will deliver care to patients, but will not use the HCAI application for this facility.	Dependent provider form must be signed and kept on file at the clinic. See www.hcaiinfo.ca .
Affiliated provider	An associated provider who has been given a user profile.	Provider will deliver care to patients and will use this facility’s HCAI application.	Affiliated provider form must be signed and kept on file at the clinic. See www.hcaiinfo.ca .
HCAI user	Any person in a facility who has been assigned a user profile.	A user may be any person requiring access to HCAI. This may be health, clerical, management or business staff, etc.	A user profile must be deactivated when a person leaves the facility.

Which Health Providers Should Be Associated with the Facility?

- Health provider details should be completed for all health professionals, regulated or unregulated, who will treat patients in or on behalf of the clinic/facility.

What about the Authorizing Officer (AO)?

- Even if you have registered the clinic and are the AO, if you also plan to deliver health services to patients, you must associate yourself – and any other person who will deliver services on behalf of your clinic – as a “provider.”

Execute Provider Agreements

- Before any provider can be listed on a treatment/assessment plan or invoice, he or she must sign a Provider Agreement called a Provider Terms and Conditions form.
- Providers associated with your facility can be set up as either:
 - Dependent providers; or
 - Affiliated providers.
- The facility AO or HCAI administrators will decide which providers will need to use the HCAI electronic application (affiliated providers) and which ones do not need to use the application (dependent providers).
- All providers associated with the facility must sign either the Dependent or Affiliated provider terms and conditions form.
 - *Dependent* providers will not be given a user profile by the facility management and, therefore, will not use the HCAI electronic application. They are dependent on other personnel in the clinic for form preparation and submission.
 - The dependent provider form can be downloaded from www.hcaiinfo.ca.
 - *Affiliated* providers will be given a user profile by the facility management and, therefore, will have the capacity to use the HCAI application.
 - The affiliated provider form can be downloaded from www.hcaiinfo.ca.
- Do not submit Provider Terms and Conditions forms to HCAI. Keep them on file at the facility for audit purposes.
- The enrolled clinic is responsible for obtaining and retaining these documents from the providers they work with. This is subject to audit by HCAI Processing.

Add Providers after Initial Set-up

From time to time, new providers may join a facility.

- Able to log on to the HCAI Web application with a unique user profile

NOTE: It is important to know that a provider is not the same as a user.

What's the Difference Between a User and a Provider?

Setting up HCAI “users” is different from setting up “providers” in your facility. Consider which staff at your facility are currently engaged in the creation, submission, follow-up and management of OCFs.

➤ *Providers*

- Someone who delivers care to patients of the health facility.
- A provider may or may not have a user profile.
- A provider with a user profile will have a unique username and password with which he or she can log on to the HCAI application.
- A provider without a user profile will not have a username and password and will not be able to log on to the HCAI application.

➤ *Users*

- May be a provider or may be a non-provider, such as an administrator, receptionist or clerical staff.
- Able to log on to the HCAI web application with a unique user profile.

Source: Health Claims for Auto Insurance Processing

Default Hourly Rates

At this time, only one default hourly rate can be inserted for a given provider. If you routinely charge more than one rate for a given provider, insert the rate that is most commonly used.

Example: If the provider does mostly non-catastrophic work, insert the non-catastrophic rate. You can overwrite the default rate and enter the catastrophic rate at any time on an OCF-18 or -21.

To add a new provider:

1. Log on to www.hcai.ca.
2. Select the Manage tab, then select the Facility Management tab.
3. Scroll to the bottom of the screen to the Associated Provider box.
4. Click on <Add Provider>.
5. Fill in the first name and last name.
6. Insert the default hourly rate for that provider (optional).

Figure 3.4: Add Provider Screen

- Select the <Add Profession> button, then select a profession from the drop-down list. Multiple professions can be added, if necessary. Press the <Add Profession> button a second time to add an additional professional.
- Enter the registration number for the provider. (*Note:* All providers in regulated professions must have a registration number.)
- Press the <Submit> button.
- You will then be returned to the Facility Management screen where the new provider(s) name(s) will have been added to the list of Associated Providers.
- Ensure that the provider signs the appropriate HCAI agreement, depending on whether he or she is an “Affiliated” or “Dependent” provider. HCAI agreement forms can be printed from the HCAI Info website at www.hcaiinfo.ca.

Press the <Save> button to finish the registration.

Figure 3.5: Associated Providers (Your “Roster”)

The screenshot displays a web interface for managing providers. It is divided into two main sections: 'Payee Information' and 'Associated Providers'.

Payee Information: This section contains several fields and checkboxes. 'Cheque Payable To' is set to 'Assm Rehak'. 'Lock Payable' has radio buttons for 'No' (selected) and 'Yes'. There are input fields for 'Payee Number', 'Payee First Name', and 'Payee Last Name'. A 'SAVE' button is located below these fields.

HCAI Submission Method: This section has a checkbox for 'PMI Integration' with radio buttons for 'No' (selected) and 'Yes'.

Associated Providers: This section shows a list of providers. A 'ADD PROVIDER' button is in the top right. The list is titled '(1 of 1)' and includes a 'View: 10 items' dropdown. The table below shows the data for the listed providers.

Provider Name	Start Date	End Date	Status
Eno, Wendy	2007/09/18		Approved
Ellis, Vini	2007/09/17		Approved
Smith, Sarah	2007/09/17		Approved

At the bottom of the interface, there is a copyright notice: '© 2007 Health Claims for Auto Insurance Processing | Dispute Policy | Claims Damages'.

Delete a Provider

Providers that have been associated with your facility cannot be deleted. This is because HCAI must maintain their information for the purpose of forms that were submitted prior to their end date. A provider must be “ended” in order to remove them from the dropdown list on OCF.

See “End Provider” for more information.

Correct Provider Information (name, registration #, etc)

Provider profiles cannot be edited. This is to preserve the history of information on forms that were submitted prior to the change in information. To correct provider information, end the incorrect version and add the provider again with the correct information. Since the old version will remain on the invoice dropdown lists for 6 months, you may wish to distinguish between the old and new versions by adding an initial or some other way to identify the correct version to use on invoices.

Example: Bob Smith’s profile was entered with the incorrect registration number. The incorrect profile should be “ended” and the new profile added. When adding the new profile, Bob’s name was entered as “Robert” so the clinic knew which profile to select when invoicing.

End Providers

- From time to time providers may leave a facility.
- The provider should be removed by entering an end date for the provider.
- This end date should reflect the DAY AFTER the provider’s last day of service at the clinic.
 - On the end date, the provider’s name will no longer appear in the drop-down lists for OCF-18s and -23s.
 - The provider name will continue to appear on INVOICE dropdown lists for 6 months after their end date. All billing for that provider should be completed within 6 months. .

To delete a provider:

- Log on to www.hcai.ca.
- Select the Manage tab, then select the Facility Management tab.
- Scroll to the bottom of the screen to the Associated Provider box.
- Select the provider.
- Enter the “End Date” for the provider.
- Press <Submit>.
- Press <Cancel> to exit the screen.

IMPORTANT: If the provider has a user profile (username and password), you must also deactivate the user profile so s/he can no longer view the health records of patients of the facility. Refer to “Deactivate Users” for instructions on how to do this.

How Can Departing Providers Ensure their Names and Registration Numbers are Deactivated from a Facility?

- To confirm that a provider’s name has been deactivated, the provider may request to be present when the facility’s User Administrator deactivates the provider’s name.
- In addition, the provider may request receipt of the original copy of the Provider Agreement, which he or she signed upon becoming associated with the facility.
- The provider may submit written notice to the facility that the Provider Terms and Conditions document signature is revoked.

If a provider has concerns about unauthorized use of her or his name and registration details, the provider may place a request with HCAI’s Privacy Officer (privacyofficer@hcaiprocessing.ca), who may agree to investigate whether a health professional’s name and registration number are active with the facility.

Add Users

The User Management module allows you to set up and maintain the users for your facility. When setting up users, you must consider:

- Levels of access
- Roles and responsibilities

What’s the Difference Between a User and a Provider?

Setting up HCAI “users” is different from setting up “providers” in your facility. Consider which staff at your facility are currently engaged in the creation, submission, follow-up and management of OCFs.

➤ *Providers*

- Someone who delivers care to patients of the health facility.
- A provider may or may not have a user profile.
- A provider *with a user profile* will have a unique username and password with which he or she can log on to the HCAI application.
- A provider *without a user profile* will not have a username and password and will not be able to log on to the HCAI application.

➤ *Users*

- May be a provider or may be a non-provider, such as an administrator, receptionist or clerical staff.
- Able to log on to the HCAI web application with a unique user profile.

Refer to Table 1 (see next page to see the different user roles that can be assigned to permit users to perform different tasks on HCAI).

Note: Only persons who have been assigned facility-level access and the role of User Administrator (UA) can create and manage user profiles

Table 1: Summary of Levels of Access and User Roles

ACCESS	ROLE	ACTIVITIES AUTHORIZED
FACILITY-LEVEL ACCESS		
Facility	<i>Administrator</i>	<ul style="list-style-type: none"> ▪ Access to Facility Management tab ▪ Update facility information ▪ Add/delete or update associated providers
	<i>User Administrator</i>	<ul style="list-style-type: none"> ▪ Access to the User Management tab ▪ Set up users ▪ Reset passwords ▪ Adjust access rights ▪ Deactivate users for your facility
	<i>Management Report Viewer</i>	<ul style="list-style-type: none"> ▪ Access to Reports tab for facility
FACILITY- <u>OR</u> PROVIDER-LEVEL ACCESS		
Provider	<i>Plan/Invoice Support</i>	<p>Access to Plans, Invoices and Search tabs.</p> <ul style="list-style-type: none"> ▪ Create <u>draft</u> plans ▪ Create <u>draft</u> invoices ▪ View plans ▪ View invoices ▪ Does <u>not</u> allow user to submit forms to HCAI ▪ If this role is combined with facility access, the user will be able to view all documents for the facility ▪ If this role is combined with provider-level access, the user will see documents only for the provider(s) for which they have access
	<i>Plan/Invoice Submitter</i>	<p>Access to Plans, Invoices and Search tabs</p> <ul style="list-style-type: none"> ▪ Create plans ▪ Create invoices ▪ View plans ▪ View invoices ▪ Submit plans and invoices ▪ If this role is combined with facility-level access, the user will be able to see all forms submitted for the facility ▪ If this role is combined with provider-level access, users will be able to see only the submitted forms that they created or those in which they are referenced

Create a New User

Figure 3.6: Add New User Screen

fac_test HCAI

PLANS INVOICES SEARCH MANAGE ? - User Manual

Search for Patient Last Name in All Forms GO Advanced LOGOUT

USER MANAGEMENT REPORTS FACILITY MANAGEMENT Welcome, Viivi to HCAI

2009/05/06

User Management > User Search

Add a New User

To add a user into HCAI, click "Add User."

ADD NEW USER

Search for Users

Enter your search criteria and click "Search"

User Status: Active Deactivated

Last Name:

First Name:

Employee ID:

Facility Roles

Facility Administrator Plan/Invoice Support

Facility User Administrator Provider Report Viewer

Plan/Invoice Submitter

SEARCH

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1. Log on to www.hcai.ca.
2. Select the Manage tab and the User Management sub-tab.
3. Press **ADD NEW USER** and a new screen will appear (Figure 3.7 below).

Figure 3.7: Entering User Details

fac_test HCAI

PLANS INVOICES SEARCH MANAGE ? - User Manual

Search for Patient Last Name in All Forms GO Advanced LOGOUT

USER MANAGEMENT REPORTS FACILITY MANAGEMENT Welcome, Viivi to HCAI

2009/05/06

User Management > User Search > Add / Edit User

Add / Edit / View User Details

Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click (link to Facility User Mgmt guide) Note: If provider name does not appear on list, helpdesk may not have received signed enrolment form

*Organization Type: Facility

*Organization: fac_test

User Status: Active

Is this user a provider? No Yes

*Last Name:

*First Name:

Title:

*User Name:

*Employee ID:

E-mail:

Phone:

What level of access do you want to give to user? --Select--

CANCEL SUBMIT

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4. Answer the question "Is the user a provider?".
 - a. If yes, a drop-down list will appear and you must select the provider to whom a user profile is being assigned.
 - b. If no, enter the first and last names of the new user.
5. Enter a username.
 - a. A username must contain at least six characters and must be unique in Ontario.
 - b. This unique username should only be used by the user to whom it is assigned.

6. Enter the employee ID.
 - a. If your facility does not use employee IDs, enter any characters.
7. Enter the person's email address and phone number (optional).
 - a. The new user will receive their username and temporary password at this email address.
 - b. If you do not enter a valid email, you will need to give this information to the user.
8. Select the level of access you wish to assign to the user (Figure 3.8). You may also refer to Table 1: Summary of Levels of Access and User Roles.

Figure 3.8: Assign Roles & Responsibilities to a User

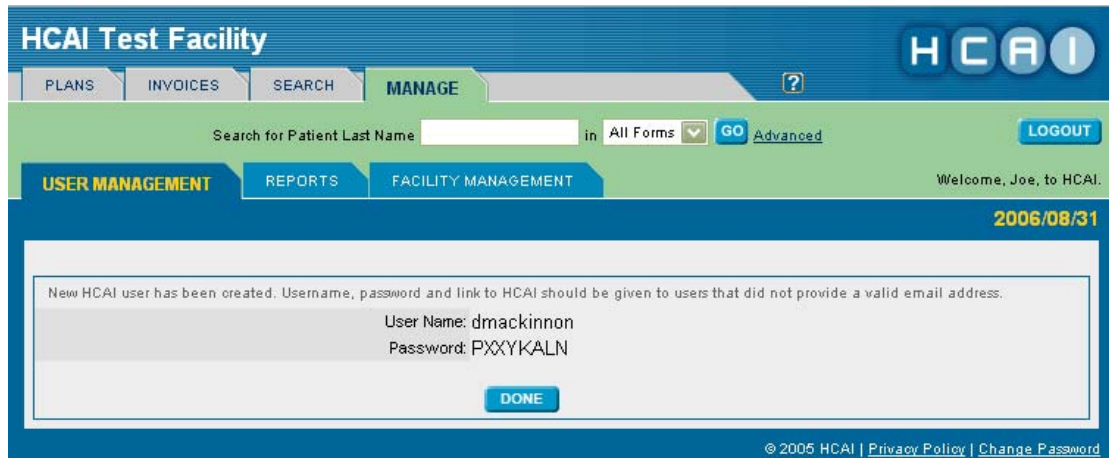
9. If you select provider-level access for a user, consider which patients' data that user is permitted to view. For example:
 - a. If a PT assistant (PTA) assists only one PT, the PTA should only be granted rights to view the data of patients of that PT.
 - b. If a PTA supports more than one PT, the PTA can be granted access to the patient data of all PTs s/he supports.

Figure 3.9: Grant Access Rights to a User

10. When assigning provider roles to a user, you may also assign which patients' data the user can view, by completing "Grant Access Rights to the User" (Figure 3.9).
 - a. Select the name of the provider(s) whose patients are viewable by the user and press the Arrow (>) button.
11. Press the Submit button, review the confirmation screen and press Submit again.
12. The User Administrator will see the username and temporary password for the new user.
 - a. If an email address was entered previously, the new user will receive an email with the username and password.
 - b. If an email address was not entered, the user administrator must communicate the username and password to the new user.
13. Press <Done> to close the window.
14. Repeat the above to create other new users.

IMPORTANT: According to federal and provincial privacy requirements, every effort must be made by organizations to permit access to personal health information only to those who require it (and who have permission to view the information). Fine tuning the provider-level access will ensure that only persons authorized to see a patient's data are able to do so.

Figure 3.10: Confirm Successful New User Profile



TIP: It is advisable for the User Administrator to record all usernames for personnel in the facility, in case the user forgets or loses the information.

Maintain or Modify HCAI Users

The User Administrator (UA) is responsible for the following tasks:

- Setting up new users, as required
- Resetting passwords, if users suspend or forget their passwords
- Updating access rights, if required
- Deactivating users who no longer require access to HCAI

From time to time a user may need additional privileges or access to cover holidays or to replace an employee. To update access rights:

To modify a user account:

1. Log on to www.hcai.ca.
2. Select the Manage tab, then select the User Management tab.
3. In the Search box, select Active, and enter the last name and press Search (Figure 3.11).
4. Select the username (Figure 3.12).
5. Enter the changes (e.g., level of access or add/remove roles) (Figure 3.13).
6. Press <Submit>, review changes and press Submit again.
7. Press <Cancel> to exit the screen.

Figure 3.11: Search for User

fac_test HCAI

PLANS INVOICES SEARCH MANAGE ? - User Manual

Search for Patient Last Name in All Forms Advanced

USER MANAGEMENT REPORTS FACILITY MANAGEMENT Welcome, Viivi to HCAI. 2009/05/06

User Management > User Search

Add a New User
To add a user into HCAI, click "Add User".

Search for Users
Enter your search criteria and click "Search"

User Status: Active Deactivated

Last Name:

First Name:

Employee ID:

Facility Roles

Facility Administrator Plan/Invoice Support
 Facility User Administrator Provider Report Viewer
 Plan/Invoice Submitter

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Figure 3.12: Select User to Edit User Profile

fac_test HCAI

PLANS INVOICES SEARCH MANAGE ? - User Manual

Search for Patient Last Name in All Forms Advanced

USER MANAGEMENT REPORTS FACILITY MANAGEMENT Welcome, Viivi to HCAI. 2009/05/06

User Management > User Search > Search Results

Search for Users

Users (1 of 1) [Refine Search](#)

Search Results for: Smith, Active
These are the users associated with your organization:

View: 10 items

Employee ID	Name	Roles	Status
1	Smith, John	Facility Administrator, Facility User Administrator, Plan/Invoice Submitter, Provider Report Viewer	Active

View: 10 items

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Figure 3.13: Change User Permissions

The screenshot shows the HCAI User Management interface. At the top, there are navigation tabs for PLANS, INVOICES, SEARCH, and MANAGE. The MANAGE tab is active. Below the navigation, there is a search bar for Patient Last Name and a LOGOUT button. The main content area is titled 'User Management > User Search > Add / Edit User'. A 'DEACTIVATE' button is located at the top right of this section. The form is titled 'Add / Edit / View User Details' and contains the following fields and options:

- *Organization Type: Facility
- *Organization: fac_test
- User Status: Active
- Is this user a provider? No Yes
- *Last Name: Smith
- *First Name: John
- Title: [Empty]
- *User Name: jsmith (with a 'RESET PASSWORD' button)
- *Employee ID: 1
- E-mail: vriis@bc.ca
- Phone: [Empty]

Below the form, there is a dropdown menu for 'What level of access do you want to give to user?' set to 'Facility'. The 'Assign Roles & Responsibilities to the User' section includes:

- Management & Administrator Roles:** Facility User Administrator, Facility Administrator, Provider Report Viewer
- Support & Submission Roles:** Plan/Invoice Submitter, Plan/Invoice Support

At the bottom of the form are 'CANCEL' and 'SUBMIT' buttons. The footer contains copyright information: © 2007 Health Claims for Auto Insurance Processing | Privacy Policy | Change Password.

⚠ Note to User Administrator: When modifying your own user account, the system will log you out; when you log back in, the new roles will be applied.

Deactivate a User

From time to time a provider or other worker may leave the facility. A number of steps should be taken to ensure that the provider will not be able to log on to your facility in HCAI after his or her last day of service with you.

IMPORTANT PRIVACY NOTICE: When personnel leave a facility, procedures must be in place to ensure their user profiles (electronic keys to the clinic) are deactivated. Failure to deactivate user profiles places confidential health information at risk. It is the responsibility of management to have procedures in place to ensure that there is no risk of unauthorized access to confidential health information.

1. Deactivate the user account by going to the Manage global tab and the User Management sub-tab.
2. Open the user profile of the individual.
3. Click the <Deactivate> button near the top right of the screen (Figure 3.13).

Deactivating a User Who Is Also a Provider

If a user is also a provider and leaves the facility, it is important to remove the provider profile. To do this:

1. Go to the Facility Administration sub-tab.
2. Scroll down until you see the name of the provider who is leaving. Double click on the provider's name.
3. In the field called End Date, insert the last day on which the provider will be working at your clinic.

Figure 3.14: Deactivate a Provider

The screenshot shows the HCAI web application interface. At the top, there is a navigation bar with tabs for 'PLANS', 'INVOICES', 'SEARCH', and 'MANAGE'. Below this is a search bar for 'Patient Last Name' and a 'LOGOUT' button. The main content area is titled 'Facility Registration > fac_test > Provider Registration'. Under 'Provider Details', there are fields for 'Status' (Approved), '* First Name' (Viivi), '* Last Name' (Riis), '* Start Date' (2009/04/20), and 'End Date' (2009/05/25). The 'End Date' field is highlighted with a red box. Below this is the 'Profession Details' section, which includes a table with 'Physiotherapist' and '4919' and an 'ADD PROFESSION' button. At the bottom, there are 'CANCEL' and 'SAVE' buttons.

Deactivating Providers Who Do Not Have a User Profile

Refer to “Delete Providers Who Leave the Facility.”

Reset Passwords

IMPORTANT: Passwords can only be reset internally by the Authorizing Officer or persons who have User Administrator rights.

1. The User Administrator must log on to HCAI.
2. Select the Manage tab, then select the User Management tab.
3. In the Search box, select Active, enter last name and press <Search>.
4. Select the username.
5. See Figure 3.15 – Press **RESET PASSWORD**.

Figure 3.15: Reset Password

The screenshot shows the HCAI Test Facility user management interface. At the top, there are navigation tabs for PLANS, INVOICES, SEARCH, and MANAGE. A search bar is present with the text 'Search for Patient Last Name' and a dropdown menu for 'All Forms'. The date '2006/08/31' is displayed in the top right. The main content area is titled 'Add / Edit / View User Details' and contains a form for creating or editing a user. The form includes fields for Organization Type, Organization, User Status, Is this user a provider?, Last Name, First Name, Title, User Name, Employee ID, E-mail, and Phone. A red arrow points to a 'RESET PASSWORD' button located next to the User Name field.

6. If a valid email address has been provided, the user will receive an email with the temporary password; if not, notify the user of the temporary password.
7. Press <Cancel> to close the screen.

Log In for the First Time

Upon successfully logging in for the first time (including after an administrator resets your password), you are redirected to the HCAI Change Password screen where you can change your password (Figure 3.18).

Figure 3.18: Change Your Temporary Password to Your Own Password

The screenshot shows the HCAI Change Password screen. At the top, there is a banner for 'HCAI Health Claims for Auto Insurance'. Below the banner, the title 'Change Password' is displayed. A 'NOTE' section lists the following rules for passwords:

- Passwords must contain at least 6 characters
- Passwords must satisfy 3 out of the 4 following sub-rules

The sub-rules are:

1. Contain at least one uppercase character
2. Contain at least one lowercase character
3. Contain at least one numeral
4. Contain at least one symbol (characters that are not defined as letters or numerals, such as @, !, # and so on)

A red bullet point indicates: 'Your temporary password must be changed. Please select a new password.' Below the note, there are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. At the bottom of the form, there are two buttons: 'SUBMIT' and 'CANCEL'. A footer message reads: 'Welcome to the HCAI application for automotive insurance health claims.' and a copyright notice: '© 2006 HCAI | Privacy Policy'.


1. Enter your temporary password in the Old Password field.
2. Then enter and confirm your new password in the New Password and Confirm New Password fields.
3. Press the <Submit> button.
4. To cancel your entry and exit the form without any changes, click on the <Cancel> button at the bottom of the screen.

Source: Health Claims for Auto Insurance Processing


General Password Rules

- Passwords must contain at least six characters.
- Passwords must contain characters from **three** of the following four groups:
 - i. Uppercase characters
 - ii. Lowercase characters
 - iii. Numerals
 - iv. Symbols (characters that are not defined as letters or numerals, such as #, @, !)
- Passwords must not contain the user's first and last name, username, or either of these spelled backwards.
- If the password and confirmation fields do not match, an error message notifies you and asks you to try again. If the password you have entered in the New Password field does not comply with the rules noted above, you will receive an error message and will be required to modify your password so that it meets the password rules.

Upon your initial log-in, the online security statement will be presented; review the statement and click Accept to proceed to the homepage.

 **Note:** If you do not accept the online security statement, you will be logged out of the system.

To avoid being suspended, click on the Forgot Your Password link toward the bottom of the screen. This opens a new screen where you are instructed on how to recover a lost password.

 **Note:** If your account is already suspended, the Forgot Your Password function will not work. You must contact your facility User Administrator to reset the password.

Changing Your Password


Users are required to change their passwords in the following cases:

- Upon initial log-in
- Every 90 days
- If the user's account has been reactivated
- After an administrator resets the user's password

To change your password:

1. Click the Change Password link located in the blue bar at the bottom right of any HCAI screen.
2. This opens the Change Password screen.
3. To change your password:
4. Enter your previous password into the Old Password field, then your new password into the New Password field.
5. Confirm your entry by re-typing the new password into the Confirm New Password field.
6. Click the Submit button to proceed, or click Cancel to exit without changing the password.

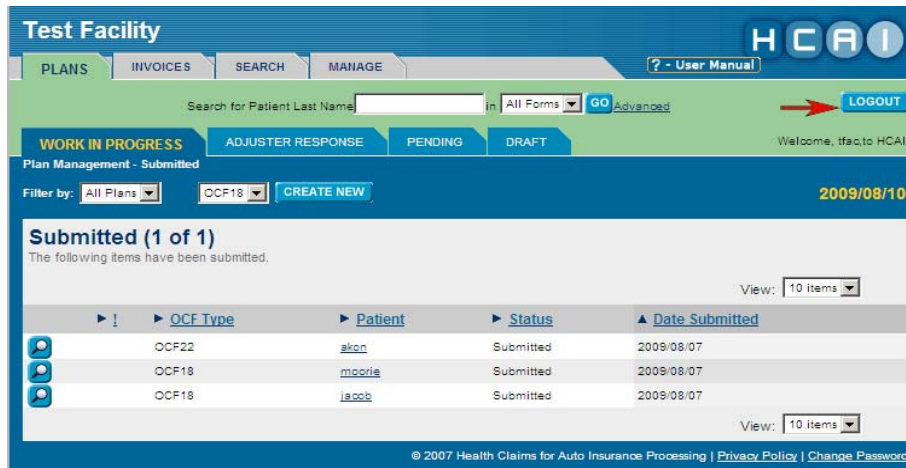
If you are successful, the screen will display a message indicating your success. If you made an error entering your previous or new password, you will be returned to the New Password screen to try again.

 **Note:** User passwords expire every 90 days; users are required to then change their passwords.

Log Out of HCAI

You can log out of the HCAI application by clicking the Logout button (Figure 3.20) on top of the facility homepage.

Figure 3.20: Logout



When logging out of the system, you will be returned to the log-in screen that displays a message confirming the successful log-out.