

# What's New? Release 3.18 For Adjusters

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**Insurer Edition**

# Timeline for Changes

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- HCAI's fall system release, Release 3.18, goes live on October 2, 2017

# Consolidate your worklists

- Adjusters will see a new filter option on their worklists, called **'E-mail Address'**
- This new filter will allow users to consolidate their worklists by adjuster's e-mail instead of by branch, making it shorter and easier to navigate
- To use this new filter option, adjusters should ask their managers to ensure the email address in their adjuster profile (located in the Manage > Insurer Management tab) is complete and up to date

The screenshot displays the MCG Insurance system interface. At the top, there are navigation tabs for 'PLANS', 'INVOICES', 'SEARCH', and 'MANAGE'. A search bar is present with the text 'Search for Claim Number' and a dropdown menu set to 'All Forms'. There are also checkboxes for 'Exact Match' and 'GO Advanced', and a 'LOGOUT' button. The user is identified as 'Emily, to HCAI'. The main section is titled 'Invoice Management - Work In Progress' and has two tabs: 'WORK IN PROGRESS' and 'ADJUSTER RESPONSE'. A 'Filter:' dropdown menu is highlighted with a green box, showing 'E-mail Address' selected. Below it, a list of email addresses is visible, including 'emoginnis@ibc.ca - McGinnis, Emily', 'lmackinnon@ibc.ca - Mackinnon, Louis', 'lpyaskina@ibc.ca - Pyaskina, Larysa', 'ndallaire@ibc.ca - Dallaire, Natalie', 'ratkins@ibc.ca - Atkins, Bob', and 'sali@ibc.ca - Ali, Syed'. Below the filter, a table titled 'Work In Progress' shows a list of items with columns for Document #, Claim #, Claimant, OCF Type, Status, Days Left, and Date Submitted. The table contains five rows of data. At the bottom, there is a 'View: 10 items' dropdown and a copyright notice: '© 2017 Health Claims for Auto Insurance Processing | Privacy | Change Password'.

Document #	Claim #	Claimant	OCF Type	Status	Days Left	Date Submitted
17081100010	222	Reynolds	OCF21C	Review Required		2017/08/11
17081100009	222	Reynolds	OCF21C	Review Required		2017/08/11
17081100005	789789	Smith	OCF21B	Review Required		2017/08/11
16113000005	222	Reynolds	OCF21B	Review Required		2016/11/30
16111000002	222	Reynolds	OCF21C	Review Required		2016/11/10

# Easily find and add Reason Codes

- We've made it faster and easier to search for and add a reason code
- When you need to decline a form or line item, all reason codes appear
- You can use the available filters to search through the list
- There will be no changes to the reason codes themselves

**Review OCF18** HCAI

**Reason Code Look Up**  
To select a reason code, click on Add button. To narrow down the list, use the filter options below.

Filter By:

Series: Adjuster decision  
Category: Authorization, policy limits, coverage  
Reason: -----

Search Results

Code	Description	ADD
1.01.00	Good or service is not covered within the Minor Injury Guideline	ADD
1.02.00	Good or service is not separately reimbursable within the Minor Injury Guideline	ADD
1.02.05	Authorized quantity exceeded	ADD
1.03.05	Authorized time period exceeded	ADD
1.04.45	Good or service is not covered within the Minor Injury Guideline	ADD
1.04.50	Good or service is not separately reimbursable within the Minor Injury Guideline	ADD
1.05.05	Time limit for filing has expired	ADD
1.09.05	Fee exceeds maximum allowed	ADD
1.11.10	Transportation deductible has not been exceeded	ADD
1.11.15	Policy coverage limits have been exhausted	ADD
1.11.25	Good or service is not covered	ADD

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# Quickly review a claimant's HCAI history

- We've updated the Associated Documents section on all forms with one that offers a consolidated view of a claimant's plans and invoices in HCAI
- The new '**Claimant View**' option, shown here, will display the total submitted and approved amounts (including amounts from archived and non-archived documents) as well as the total balance remaining to be invoiced
- A user can also change to the '**Plan View**', which displays the invoices that have been submitted for a plan

The screenshot displays the 'Review OCF23' form in the HCAI system. The form is divided into several sections:

- Claim Identifier:** Applicant Name: Reynolds, Kristina; Claim Number: 22665321; Policy Number: 223; Date of Accident: 2016/05/03.
- Return this form to:** MCG Insurance, 15 Sussex Drive, Ottawa, Ontario, K1N1P5.
- Plan Identifier:** Document Number: 16110100003; OCF Type: 23; Date Submitted: 2016/11/01; Source: Web; OCF Effective Date: 2016/07/22; Archival Status: Not Archived.
- Associated Documents Results:** Documents Associated with Claimant - Reynolds, Kris. A green arrow points to the 'Claimant View' dropdown menu.

Showing all associated plan(s) that are not archived.

Document #	Type	Facility	Status	Date Sent	Proposed Amount(\$)	Approved Amount(\$)
<a href="#">17081100012</a>	OCF23	<a href="#">EM Rehab Inc.</a>	Declined	2017/08/11	\$3,000.00	\$3,000.00
<a href="#">17081100011</a>	OCF23	<a href="#">EM Rehab Inc.</a>	Responded	2017/08/11	\$3,500.00	\$3,500.00
<a href="#">17011800001</a>	OCF18	<a href="#">EM Rehab Inc.</a>	Approved	2017/01/18	\$615.00	\$615.00
16110100003	OCF23	<a href="#">EM Rehab Inc.</a>	Review Required	2016/11/01	\$1,265.00	
<a href="#">16110100002</a>	OCF23	<a href="#">EM Rehab Inc.</a>	Review Required	2016/11/01	\$677.00	
Non-archived Sub-total:					\$9,412.00	\$7,115.00
Archived Sub-total:						
Total:					\$9,412.00	\$7,115.00

Showing all associated invoice(s) that are not archived.

Document #	Type	Facility	Status	Date Sent	Proposed Amount(\$)	Approved Amount(\$)
<a href="#">17081100010</a>	OCF21C	<a href="#">EM Rehab Inc.</a>	Review Required	2017/08/11	\$2,500.00	
<a href="#">17081100009</a>	OCF21C	<a href="#">EM Rehab Inc.</a>	Review Required	2017/08/11	\$1,500.00	
<a href="#">16113000005</a>	OCF21B	<a href="#">EM Rehab Inc.</a>	Review Required	2016/11/30	\$0.00	
<a href="#">16111000002</a>	OCF21C	<a href="#">EM Rehab Inc.</a>	Review Required	2016/11/10	\$233.00	
<a href="#">16110800001</a>	OCF21C	<a href="#">EM Rehab Inc.</a>	Approved	2016/11/08	\$233.00	\$233.00
Non-archived Sub-total:					\$4,466.00	\$233.00
Archived Sub-total:						
Total:					\$4,466.00	\$233.00
Balance Remaining:						\$6,882.00

# Perform partial approvals even faster

- For partial approvals, we've made it easier to add a reason code in bulk
- To do this, check off multiple line items using the new checkbox next to the line item and press the 'Apply Reason Codes' button to add the same reason code to multiple items

GS Ref#	Code	Attr.	Provider Reference	Estimate/Day			Projected			
				Quantity/Measure	Cost	Total Count	Total Cost	Proposed Tax	Adjuster Response	
<input checked="" type="checkbox"/>	1 2.GZ.08 "Test, respirator..."		<u>Harry_Potter</u>	1.00 HR	255.00 255.00	1 1	255.00 255.00	<input type="checkbox"/>	<input type="checkbox"/>	...
<input checked="" type="checkbox"/>	2 2.ZZ.02 "Assessment (exam..."		<u>Harry_Potter</u>	1.00 HR	360.00 360.00	1 1	360.00 360.00	<input type="checkbox"/>	<input type="checkbox"/>	...

**APPLY REASON CODES** **REMOVE REASON CODES**

Use these buttons with the checkboxes on the left.  
Explanation of adjuster response

Estimated duration of this Plan: 1 weeks  
How many visits have you already provided? 0 visits

Has the applicant or substitute decision maker confirmed consent by initialing the proposed goods and services?  No  Yes

# Adjudicate, then print – right away

- We've added a Print button to the adjudication confirmation window so adjusters can easily save a PDF copy of the form with the decision marked off



The screenshot displays the 'Review OCF18' interface. It features a blue header with the 'HCAI' logo. The main content area is divided into three columns: 'Claim Identifier', 'Return this form to:', and 'Plan Identifier'. Below these columns is a confirmation message: 'You have approved document number 17081100001'. At the bottom of this message are three buttons: 'PRINT', 'CLOSE WINDOW', and 'CREATE EOB'. A green arrow points to the 'PRINT' button. The footer contains the text '© 2017 Health Claims for Auto Insurance Processing | Privacy'.

Claim Identifier	Return this form to:	Plan Identifier
Applicant Name: Smith, Gregory Claim Number: 789789 Policy Number: 1010 Date of Accident: 2016/08/06	MCG Insurance 123 Main St. Markham, Ontario M1M1M1	Document Number: 17081100001 OCF Type: 18 Date Submitted: 2017/03/11 Source: Web OCF Effective Date: 2016/07/22 Archival Status: Not Archived

You have approved document number 17081100001

[PRINT](#) [CLOSE WINDOW](#) [CREATE EOB](#)

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# Use the Claimant Summary Report to track invoices in HCAI

- The Claimant Summary report outlines the total goods and services paid in HCAI
- We're making it available in the more workable .csv format, which can be opened using Excel
- This report does not include amounts from archived documents

The screenshot shows the MCG Insurance HCAI interface. The top navigation bar includes 'PLANS', 'INVOICES', 'SEARCH', and 'MANAGE'. A search bar is present with a 'GO' button and an 'Advanced' link. The 'REPORTS' section is active, displaying a 'Generate New Report' form. The form has a dropdown menu for 'Claimant Summary' selected, with a green arrow pointing to it from the text 'goods and services paid in HCAI'. Below this are fields for 'Input Claim #' (Insurer: MCG Insurance, Claim #: 789789) and 'Select a Claimant' (Smith, Gregory). A 'GENERATE REPORT' button is at the bottom of the form. To the right of the form, a text box explains that the Claimant Summary report is a decision support tool summarizing injuries, goods and services, costs, and duration of treatment for an individual claimant. Below the form is a 'Reports Requested' section with a table of reports.

Report Name	Date & Time Requested	Report Parameters	Status
<input type="checkbox"/> Claimant Summary	2017/08/17 04:07:41 PM	Gregory.Smith.789789	Completed
<input type="checkbox"/> Claimant Summary	2017/08/17 02:10:58 PM	Gregory.Smith.789789	Completed

# A better document search

- Document search results will now be arranged by the date they were submitted, with the most recent results first
- We've also removed the pre-populated date range on the search screen to make your searches faster and easier

MCG Insurance

PLANS INVOICES SEARCH MANAGE

Search for Claim Number  in All Forms  Exact Match

DOCUMENT SEARCH

Welcome, Emily, to HCAI. 2017/08/21

OCF Search

Enter your search criteria and click "Search"

Date Submitted - From:    
To:

Document Number:   Exact Match  
Claim Number:   Exact Match  
Policy Number:   Exact Match  
Date of Accident:    
Date of Birth:

Claimant Last Name:   Exact Match  
Claimant First Name:   Exact Match  
Claimant Phone Number:   Exact Match  
Adjuster:

[Advanced Options >>](#)

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# What's Next?

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- **Share this HCAI Update** with individuals at your organization who interact with the HCAI system
- **Keep checking [HCAIinfo](#)** - HCAI's dedicated eLearning resource site—over the coming months for more information
- **Learn about** changes to the system that will impact **management and claim-claimant administration** users by visiting HCAIinfo's [Recent News](#) page