

What's New? Release 3.18

For Management and Administration



Insurer Edition

Timeline for Changes

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

OCF matching made easier

- The 'Match Documents' screen is being made more intuitive for staff that perform matching
- The highlighted fields indicate why a claimant is not a perfect match to the document, allowing you to match the form even faster
- We're also taking steps to improve the ratio of forms automatically matched to claimants in HCAI

Match Claimant HCAI

CANCEL

Current Branch Information
Switch the branch of the document
Insurer: MCG Insurance
Branch: Ottawa

Transfer Document
Select a new insurer and/or branch to transfer the document
Insurer: MCG Insurance
Branch: Ottawa

Claimant Match
The system has determined 1 potential claimant(s). Please match the applicant to a list of known claimants or [search](#) for one in the system.
SEARCH FOR CLAIMANT

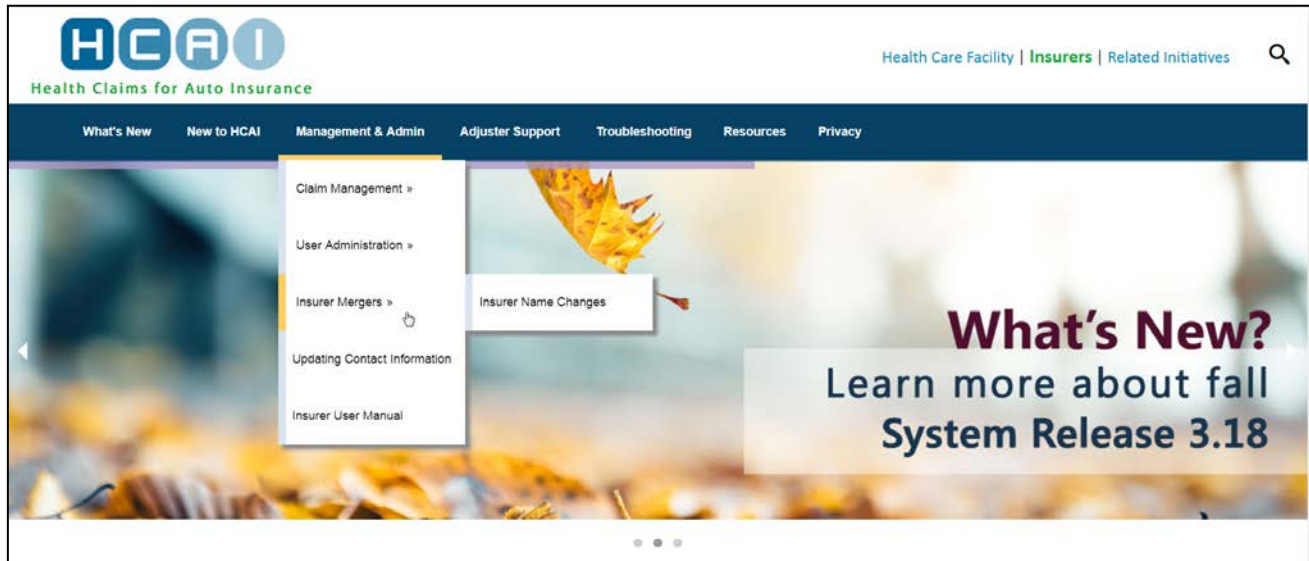
Submitted Applicant
Claim Number: 789123456789
Policy Number: 001
Date of Accident: 2016/08/27
Date of Birth: 1996/08/07
Gender: Female
Last Name: Smith
First Name: Rian
Middle Name:
Address: 123 Main St.
City: Toronto
Province: ON
Postal Code: M1M 1M1
Policy Holder First Name:
Policy Holder Last Name:

Possible Matches
There is no associated claimant. **CREATE CLAIM**
Highlighted fields indicate where insurer claimant data does not match facility-submitted data.
CANNOT BE MATCHED **SENT TO WRONG INSURER**

Status: **Active** **MATCH**
Claim Number: 789123456789
Policy Number: 001
Date Of Accident: 2016/08/27
Date of Birth: 1995/08/07
Gender: Female
Last Name: Smith
First Name: Rian
Middle Name:
Address: 123 Main St.
City: Toronto
Province: ON
Postal Code: M1M 1M1
Policy Holder First Name: Rian
Policy Holder Last Name: Smith

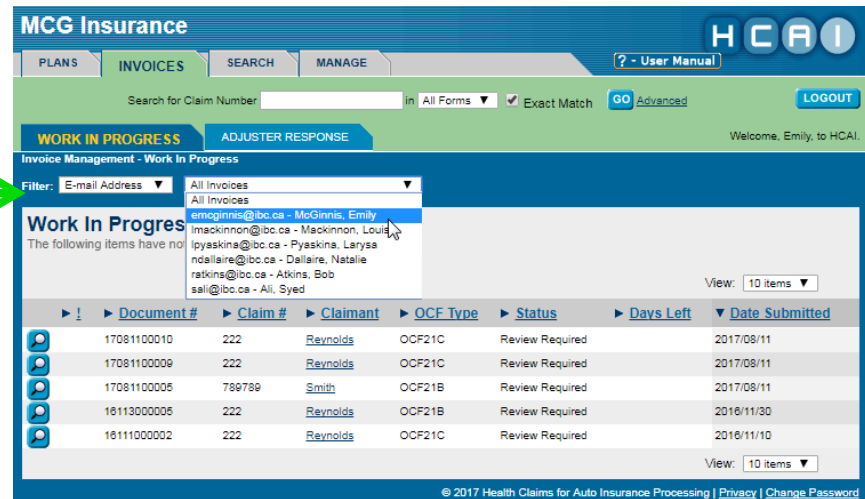
Transfer documents between merged companies

- The full launch of the merger tool is coming this fall, meaning all legally merged companies can choose to join together in a parent-child set up
- For companies that request to use this tool, this means fewer login accounts for staff and an increased ability to transfer forms between merged companies
- View HCAIinfo's [Insurer Mergers](#) page for details about how the tool works and how to request it



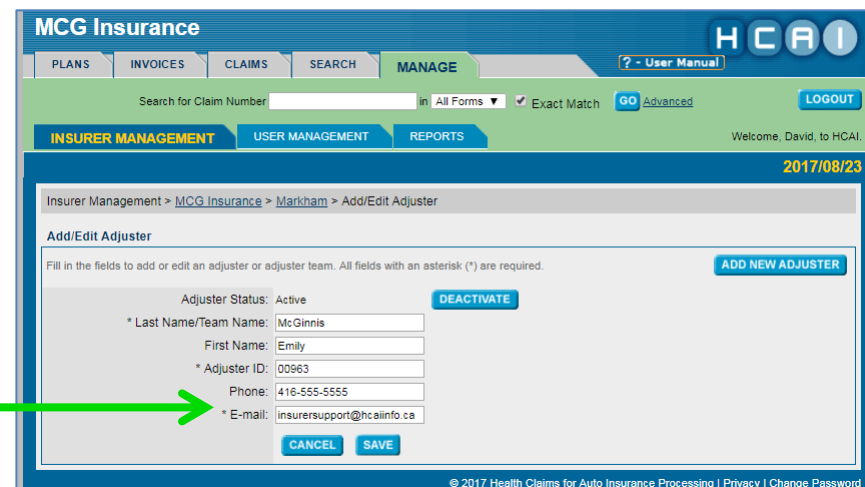
Better worklists for everyone

- Adjusters and their managers will benefit from a new worklist filter called 'E-mail address' that will display one worklist per person, instead of one worklist per adjuster per branch
- Important:** To ensure the new filter works properly, check to make sure adjuster profiles have their current e-mail address entered for each branch in the Manage > Insurer Management screen and for each user in the Manage > User Management screen



The screenshot shows the 'MCG Insurance' interface with the 'INVOICES' tab selected. The 'WORK IN PROGRESS' section is active, and a dropdown menu is open for the 'Filter' field, showing 'E-mail Address' as the selected option. The dropdown list includes 'All Invoices' and several email addresses. Below the dropdown is a table of worklist items.

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
16110000002	222	Reynolds	OCF21C	Review Required		2016/11/10



The screenshot shows the 'MCG Insurance' interface with the 'MANAGE' tab selected. The 'INSURER MANAGEMENT' section is active, and the 'Add/Edit Adjuster' form is displayed. The form contains fields for Adjuster Status, Last Name/Team Name, First Name, Adjuster ID, Phone, and E-mail. A green arrow points from the 'E-mail' field in the form to the 'E-mail address' filter in the screenshot above.

Adjuster Status: Active [DEACTIVATE]
* Last Name/Team Name: McGinnis
First Name: Emily
* Adjuster ID: 00963
Phone: 416-555-5555
* E-mail: insurersupport@hcaiinfo.ca

Update contact information with ease

- The Insurer Management tab is being redesigned so that it's easier to review and update contact information for your organization
- Take a moment to make sure everything is up to date with all of your companies

The screenshot displays the 'MCG Insurance' web application interface. The top navigation bar includes 'PLANS', 'INVOICES', 'CLAIMS', 'SEARCH', and 'MANAGE'. The 'MANAGE' tab is active, and the 'INSURER MANAGEMENT' sub-tab is selected. The page title is 'MCG Insurance' and the user is logged in as 'David, to HCAI'. The date is '2017/08/24'. The main content area is titled 'Insurer Details' and contains the following information:

Insurer Details [DEACTIVATE]

Fill in the fields to add or edit an insurer.
NOTE: All fields with an asterisk (*) are required.

Insurer Status: Active
* Insurer Name: MCG Insurance
* IBC ID: 789/789/789
* Virtual insurer?: No Yes

Insurer Address

* Address: 31 Florencia
Toronto
* City: Toronto
* Province: ON - Ontario
* Postal Code: M2J 5B6
* Phone: (416) 445-5912
Fax: (416) 445-5912

Please assign two individuals who can receive HCAI communication updates and distribute them to staff in your organization. If you integrate with HCAI, you may wish to make one a technical contact. This information should be reviewed on a regular basis and updated as needed.

Contact One

Contact One Name: Ellis Shaw
Contact One Phone: 416-555-5555
Contact One E-mail: eshaw@test.com
Confirm Contact One E-mail: eshaw@test.com

Contact Two

Contact Two Name: David Pippin
Contact Two Phone: 905-555-5557
Contact Two E-mail: dpippin@test.com
Confirm Contact Two E-mail: dpippin@test.com

Configuration Management

* Payment Extract?: No Yes
* Claim-Claimant Feed and Extract?: No Yes
* Insurer All-data Extract?: No Yes
* Privacy Consent?: No Yes

Browse Branches [ADD NEW BRANCH]

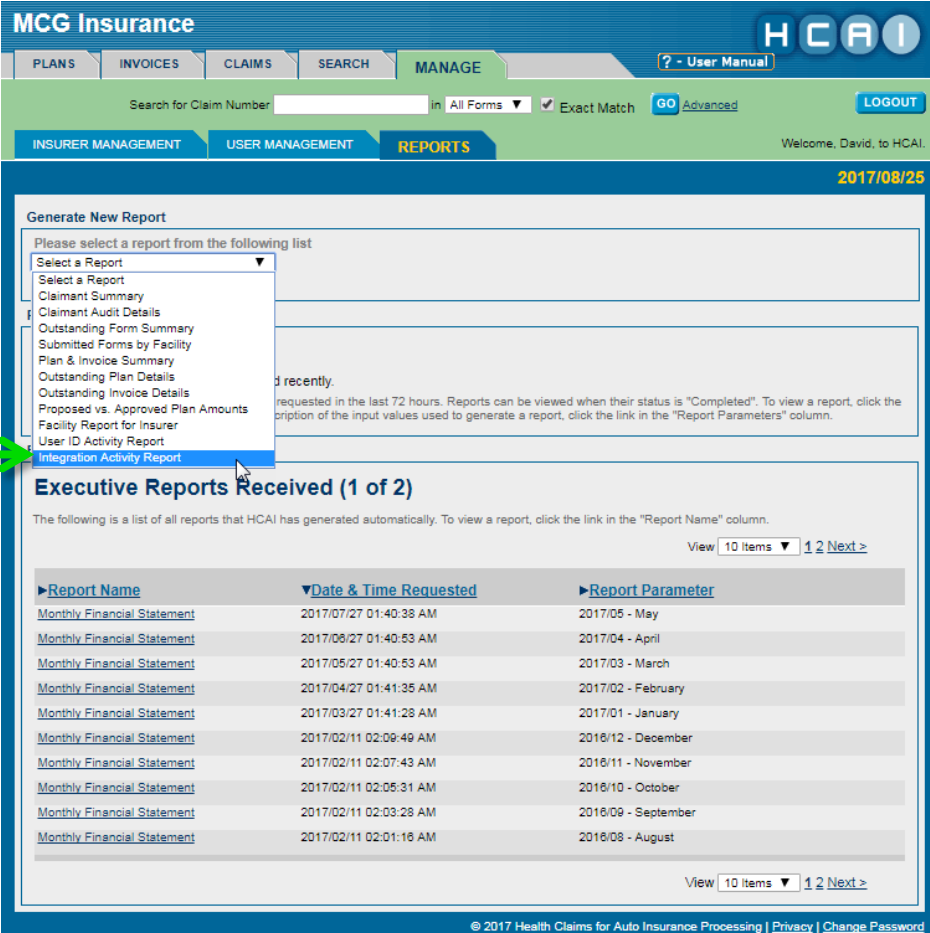
Branch Name	City	Status	
Markham	Markham	Active	[DEACTIVATE]
Ottawa	Ottawa	Active	[DEACTIVATE]
Richmond Hill	Richmond Hill	Active	[DEACTIVATE]

[CANCEL] [SAVE]

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Keep an eye on integration activity

- We're making it easier for integrating insurers to monitor the use of their credentials
- For those with the 'Report Viewer' role, we're adding a new 'Integration Activity Report' to the Reports tab that will list instances of integration requests being sent to HCAI with the company's credentials



The screenshot displays the MCG Insurance web application interface. At the top, there are navigation tabs for PLANS, INVOICES, CLAIMS, SEARCH, and MANAGE. A search bar is present with a dropdown for 'All Forms' and a checkbox for 'Exact Match'. The user is logged in as 'David' and the date is 2017/08/25. The 'REPORTS' tab is selected, and a dropdown menu is open, highlighting the 'Integration Activity Report' option. Below the dropdown, there is a section for 'Executive Reports Received (1 of 2)' with a table of report data.

Report Name	Date & Time Requested	Report Parameter
Monthly Financial Statement	2017/07/27 01:40:38 AM	2017/05 - May
Monthly Financial Statement	2017/06/27 01:40:53 AM	2017/04 - April
Monthly Financial Statement	2017/05/27 01:40:53 AM	2017/03 - March
Monthly Financial Statement	2017/04/27 01:41:35 AM	2017/02 - February
Monthly Financial Statement	2017/03/27 01:41:28 AM	2017/01 - January
Monthly Financial Statement	2017/02/11 02:09:49 AM	2016/12 - December
Monthly Financial Statement	2017/02/11 02:07:43 AM	2016/11 - November
Monthly Financial Statement	2017/02/11 02:05:31 AM	2016/10 - October
Monthly Financial Statement	2017/02/11 02:03:28 AM	2016/09 - September
Monthly Financial Statement	2017/02/11 02:01:16 AM	2016/08 - August

A better approach to document archiving

- Starting this fall, plans and invoices that belong to the same claimant will archive together as a group, one year after the most recent claimant activity
- This change will not restore documents that have already been archived

Search for OCFs by Provider name

- We know you don't always have the Provider Registry number handy – that's why we're adding the ability to search for forms by a provider's first and last name

The screenshot shows the MCG Insurance web application interface. At the top, there are navigation tabs for PLANS, INVOICES, CLAIMS, SEARCH, and MANAGE. The SEARCH tab is active. Below the navigation, there is a search bar for Claim Number and a dropdown menu for 'All Forms'. There are also checkboxes for 'Exact Match' and a 'GO' button. The main content area is titled 'DOCUMENT SEARCH' and contains the 'OCF Search' form. The form has several input fields for search criteria, each with an 'Exact Match' checkbox: Date Submitted - From, To, Document Number, Claim Number, Policy Number, Date of Accident, Date of Birth, Claimant Last Name, Claimant First Name, Claimant Phone Number, and Adjuster. Below these is the 'Advanced Options' section, which includes checkboxes for Document Type (OCF18, OCF21B, OCF21C, OCF22, OCF23, Form 1), Claimant Status (Active, Deactivated, Unmatched), Document Status (Submitted, Need to Discuss, Review Required, Approved, Partially Approved, Declined, Pending), and Archival Status (Not Archived, Archived). At the bottom of the form, there are fields for Provider Last Name, Provider First Name, Provider Profession, and Provider Registry Number (College/Registry ID), each with an 'Exact Match' checkbox. A green arrow points from the text 'and last name' in the bullet point to the Provider Last Name and Provider First Name fields. At the bottom right of the form, there is a 'SEARCH' button and a copyright notice: '© 2017 Health Claims for Auto Insurance Processing | Privacy | Change Password'.

What's Next?

- **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 **adjuster** users by visiting HCAIinfo's [Recent News](#) page