

# What's New? Release 3.19 For Management & Admin

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**Insurer Edition**

# Timeline for Changes

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- HCAI's spring system release, Release 3.19, goes live on April 9, 2018

# Part 1: Claimant Management Updates

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# #1 New 'Change Claimant' Button

The new '**Change Claimant**' button will appear on Tab 1 of all OCFs for HCAI users with the 'Form Manager' role. It will allow you to update the claimant associated with an **already adjudicated** document without withdrawing the decision.

The screenshot shows the 'Review OCF23' interface. At the top, there are tabs labeled 1, 2, 3, and 4. Tab 1 is selected and circled in red. Below the tabs are buttons for 'CANCEL', 'CREATE EOB', and 'PRINT'. The main content area is divided into three sections: 'Claim Identifier', 'Return this form to:', and 'Plan Identifier'. Below these is 'Part 1: Applicant Information', which includes a note: 'You may change the claimant linked to this document by clicking the 'Change Claimant' button. Note: This Document is owned by'. Underneath, there are two columns of claimant information: 'Claimant Information on Form' and 'Insurer Claimant Information'. A red circle highlights the 'CHANGE CLAIMANT' button located between these two columns.

## How to use the button:

1. Press the 'Change Claimant' button
2. Search for the claimant record you'd like to transfer the document to
3. Press the 'Match' button to select the new claimant record

\* The 'Change Claimant' button will **not** appear if the document has been archived.

## #2 Permanently Disable Claims Created in Error

- If you have a duplicate or incorrect claim, you can permanently disable the claim so there is no chance of it being matched to another document in the future
- The disable button will only appear if all claimants are eligible to be disabled; to be eligible, the claimant must have no forms associated with it
- Once disabled, the claim will be treated as though it was never created
  - It won't appear in searches or be eligible for auto-matching

# #2 Permanently Disable Claims Created in Error

**MCG Insurance** HCAI

PLANS INVOICES **CLAIMS** SEARCH MANAGE HCAIinfo

Search for Claim Number  in All Forms  Exact Match  Advanced

**CLAIMS** CLAIMANTS Welcome, David, to HCAI. 2018/01/29

Claims > [Claim Search](#) > Claim Details for claim #020-AA-223232

**Claim Details**

Fill in the fields to add/edit a claim into HCAI. You may deactivate the claim if no further documents are expected to arrive for this claim. You may permanently disable the claim if it has been created in error or is a duplicate.  
NOTE: All fields with an asterisk (\*) are required.

Insurer: MCG Insurance  
Branch: Ottawa

\* Claim #:   
\* Policy #:

\* Policy Holder Last Name:   
Policy Holder First Name:

\* Date of Accident:

## How to use the button:

1. Go to the claims Tab
2. Search for and open the claimant record you'd like to disable
3. Press the 'Disable' button
4. The claim will be permanently disabled

# #3 Changes to the Claimant Search Screen

- Users that search for claimants will see a new search option in the Claims > Claimants tab
- You can now choose to search for claimants by an 'Adjuster Email', which will run a single search across all the branches an adjuster is associated with
- You can still run a traditional search for claimants using the 'Adjuster Name' option, which allows you to specify the branch you'd like to run the search in

# #3 Changes to the Claimant Search Screen

MCG Insurance

PLANS INVOICES CLAIMS SEARCH MANAGE HCAInfo

Search for Claim Number  In All Forms  Exact Match GO Advanced LOGOUT

CLAIMS CLAIMANTS

Welcome, David, to HCAI. 2018/02/07

Claims > Claimant Search

General Notification

The following items need your attention

No records were found.

Search for Claimants

Search by Adjuster:  Adjuster Name  Adjuster E-mail

Branch:

Adjuster Name:

Phone #:

Postal Code:

Insurer: MCG Insurance

Search by Adjuster:  Adjuster Name  Adjuster E-mail

Branch:

Adjuster Name:

Claimant Status:  Active  Deactivated

SEARCH

© 2018 Health Claims for Auto Insurance Processing | Privacy | Change Password

The **new** 'Adjuster E-mail' search allows you to search for an adjuster's claimants across all branches



# #4 New Claim-Claimant Editor Role

- We're adding a new user role option that will allow adjuster-level users to update or deactivate their assigned claims
- This new role is optional and can be manually added to the adjuster-level user
- The new role will not affect any of your existing permissions
- To be assigned this new role, send a request to an HCAI user administrator at your organization

## **Part 2: Other Organization Improvements**

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# #5 New Branch Management Settings

- We're adding new settings to give you more flexibility in how you manage your branches in HCAI
  - For the first time, you'll be able to prevent new claim/claimant records from being set up in a specific branch
  - You'll also be able to turn off a facility's ability to submit documents to a branch; Just make sure you leave one branch open to accept new documents
- The facility submission setting will not prevent forms from being auto-matched to existing claimants in a branch
  - For this reason, adjusters should retain their existing adjuster profiles
- Integrating insurers should speak with their technical team prior to editing these settings

# #5 New Branch Management Settings

The screenshot displays the MCG Insurance system interface. At the top, there is a navigation bar with tabs for PLANS, INVOICES, CLAIMS, SEARCH, and MANAGE. The MANAGE tab is highlighted. Below the navigation bar, there is a search bar for Claim Number and a LOGIN button. The main content area shows the Insurer Management section, with a sub-tab for Branch Details. The branch name is 'Markham'. The Branch Management section is highlighted with a red box and contains two settings: '\* Allow facilities to submit documents to this branch?' and '\* Allow claim-claimants to be set up in this branch?'. Both settings have radio buttons for 'No' and 'Yes', with 'Yes' selected. There are CANCEL and SAVE buttons at the bottom of the settings section.

MCG Insurance

PLANS INVOICES CLAIMS SEARCH **MANAGE** HCAI

Search for Claim Number  in All Forms  Exact Match GO Advanced LOGOUT

**INSURER MANAGEMENT** USER MANAGEMENT REPORTS

Welcome, David, to HCAI. 2018/02/07

Insurer Management > MCG Insurance > Branch Details

Fill in the fields to add or edit a branch. All fields with an asterisk (\*) are required.

Add / Edit / View Details of "Markham" **DEACTIVATE** **ADD BRANCH**

Branch Status: Active

\* Branch Name:

\* Branch ID:

Branch Address

\* Address:

\* City:

Configure your settings for this branch. Here, you can manage the flow of receiving new documents from health care facilities to this branch and the ability to set up claim-claimant records in this branch.

**Branch Management**

\* Allow facilities to submit documents to this branch? :  No  Yes

\* Allow claim-claimants to be set up in this branch? :  No  Yes

**CANCEL** **SAVE**

**To update these settings:**

1. Have an Insurer Administrator go to the Manage > Insurer Management tab
2. Scroll to the bottom and select the hyperlink of the branch you wish to edit
3. Scroll to the Branch Management section and update settings

# #6 New Chief Privacy Officer Contact

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- Privacy and Security continue to be paramount on the HCAI system, which is why we are adding a new Chief Privacy Officer contact
- This person should be someone who is available to review privacy-related communications and inquiries on behalf of your organization
- This new contact will not replace your current Contact 1 or Contact 2

# #6 New Chief Privacy Officer Contact

Request an **Organization Administrator** fill in the Chief Privacy Officer contact information starting April 9

The screenshot shows the MCG Insurance HCAI system interface. The top navigation bar includes 'MCG Insurance', 'PLANS', 'INVOICES', 'CLAIMS', 'SEARCH', and 'MANAGE' (circled in red). Below the navigation bar is a search area for claim numbers and a 'LOGOUT' button. The main content area is titled 'INSURER MANAGEMENT' and contains a form for adding or editing an insurer. The form includes a 'DEACTIVATE' button and a section for 'Insurer Details' with fields for 'Insurer Status', 'Insurer Name', and 'IBC ID'. Below this is a section for 'Contact One' and 'Contact Two' with fields for name, phone, and email. At the bottom, there is a section for 'Chief Privacy Officer' with fields for name, phone, and email. A large black arrow points from the 'Chief Privacy Officer' section of the bottom form to the 'Chief Privacy Officer' section of the top form.

**MCG Insurance** HCAI

PLANS INVOICES CLAIMS SEARCH **MANAGE** HCAInfo

Search for Claim Number  in All Forms  Exact Match GO Advanced LOGOUT

INSURER MANAGEMENT USER MANAGEMENT REPORTS Welcome, David, to HCAI. 2018/02/07

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

**Insurer Details** DEACTIVATE

Insurer Status: Active  
\* Insurer Name: MCG Insurance  
\* IBC ID: 789789789

Please assign a privacy staff member with the responsibility for managing privacy/security breaches or any privacy issue identified by HCAI Processing. This should be the Chief Privacy Officer (CPO) or equivalent.

**Chief Privacy Officer**

\* Chief Privacy Officer Name:   
\* Chief Privacy Officer Phone:   
\* Chief Privacy Officer E-mail:   
\* Confirm Chief Privacy Officer E-mail:

\* Contact One Phone: (416) 445-5012  
\* Contact One E-mail: emcginns@ibc.ca  
\* Confirm Contact One E-mail: emcginns@ibc.ca

**Contact Two**

\* Contact Two Name: David Pippin  
\* Contact Two Phone: (613) 555-5557  
\* Contact Two E-mail: emcginns@ibc.ca  
\* Confirm Contact Two E-mail: emcginns@ibc.ca

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**Chief Privacy Officer**

\* Chief Privacy Officer Name:   
\* Chief Privacy Officer Phone:   
\* Chief Privacy Officer E-mail:   
\* Confirm Chief Privacy Officer E-mail:

## #7 An Easier Way to Grant Worklist Access

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- We know that setting up an adjuster and granting worklist access is tedious
- That's why we have added a new search option to make granting worklist access faster and easier

# #7 An Easier Way to Grant Worklist Access

- The new **Email View** will give you a simplified list of all adjuster profiles consolidated by email address
- The **Branch View** will give you the original view you're used to, with every branch and adjuster profile listed
- Click 'Remember my preference' to retain your preference for next time

**Grant Access Rights to the User**

Access rights allow the user to view forms for the selected adjusters of a company. If a user requires access to all forms in a company or branch, regardless of what adjuster is assigned to the file, select Insurer or Branch level access.

Branch View (Original): allows you to edit access to adjuster records by individual branch

Email View (Simple view): allows you to edit access to adjuster records by email address  Remember my preference

Enter the adjuster email or name (either first or last) below and click 'Search'. Move adjusters from the 'Available Adjusters' list to the 'Selected Adjusters' list to add access to a worklist using the > or >> buttons. To remove access, move adjusters from the 'Selected Adjusters' list to the 'Available Adjusters' list using the < or << buttons.

Search for Adjuster:   Include available adjusters deactivated within the last 120 days

**SEARCH**

**Available Adjusters Search Result**

Active

- Alli, Syed (salli@bc.ca)
- Atkins, Bob (ratkins@bc.ca)
- Dallaire, Natalie (ndallaire@bc.ca)

**Selected Adjusters Grouped By E-mail Address**

Active

- MacKinnon, Louise (LMACKINNON@IBC.CA)
- McGinnis, Emily (emcginnis@bc.ca)
- Pyskine, Larisa (lpyskine@bc.ca)
- Robson, Danielle (drobson@MCG.com)

**ADD ALL >>**

**ADD >**

**< REMOVE**

**<< REMOVE ALL**

\* = indicates more than one adjuster name is associated with this email address.  
† = indicates this adjuster has a profile in a branch that has not yet been linked to this user.

[Processing](#) | [Privacy](#) | [Change Password](#)

**Grant Access Rights to the User**

Access rights allow the user to view forms for the selected adjusters of a company. If a user requires access to all forms in a company or branch, regardless of what adjuster is assigned to the file, select Insurer or Branch level access.

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Search for Adjuster:   Include available adjusters deactivated within the last 120 days

**SEARCH**



# Browser Updates

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- As always, we recommend using HCAI with an up-to-date web browser
- Starting in Release 3.19, HCAI will add support for Safari 10 for Mac users
- HCAI recommends using Internet Explorer 11 for Microsoft Users and Safari 10 for Mac users

# 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 **adjusters** by visiting HCAIinfo's [Recent News](#) page