

HCAI 10 STEP RE-ENROLMENT

The check list below defines the Steps an Insurer organization may need to follow when re-enrolling in HCAI. Each step is developed further in the following pages. Click on the Step heading to go directly to a specific step. If using a pop-up blocker, allow exceptions from www.hcai.ca.

- 1.) User Administration Staff: Reset Password For Back-up User Administrator or Create a New User Administrator**

This step should be completed by all Insurer organizations.
- 2.) Organization Management: Review All Information Regarding Organization Head Office and Branches**

This step should be completed by all Insurer organizations.
- 3.) User Management: Reset Passwords for Support Staff with Branch Level Access (Claim-Claimant Administrators, Plan/Invoice Managers, Report Viewers), Deactivate Users No Longer With the Organization**

This step applies only to Insurers that are migrating their data.
- 4.) Add New Adjusters**

This step should be completed by all Insurer organizations.
- 5.) Run Report on Active Claim-Claimants Associated with Adjusters (or Claim Search)**

This step applies only to Insurers that are migrating their data.
- 6.) Re-assign / Deactivate Claim-Claimants Where Necessary**

This step should be completed by all Insurer organizations.
- 7.) Deactivate “Old / No longer active” Adjusters**

This step applies only to Insurers that are migrating their data.
- 8.) Add All Active Claim-Claimant Data**

This step should be completed by all Insurers (manually for those who do not have the claim-claimant feed).
- 9.) Reset Remaining User Passwords, Add New Users as Needed**

This step should be completed by all Insurer organizations.
- 10.) Activate the Insurer(s)**

This step is mandatory for all Insurers.

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1.) **User Administration staff: Reset Password for Back-up User Administrator or Create a New User Administrator**

The User Administrator will receive a temporary password via email following the processing of the Insurer Enrolment forms and will be requested to change the temporary password upon first login. Once the password is changed another User Administrator should be created to serve as a back-up. This is a critical step as passwords are reset by the User Administrator of the organization, but he/she **cannot** reset his/her own password. By setting up a back-up user this person could reset the User Administrator's password if he/she accidentally suspends his/her password. Depending on the size of the organization, a back-up User Administrator could also assist in resetting passwords or deactivating users who have left the organization. The creation of a back-up User Administrator ensures that should the standard User Administrator be away or unable to provide the required support to HCAI users, another User Administrator is available who can assume responsibility for all required tasks.

a. Actions to Reset User Administrator Password

- i. User Administrator enters in user name & temporary password
- ii. User Administrator is directed to *Password Reset* screen
- iii. User Administrator creates new password in accordance with HCAI password stipulations
- iv. User Administrator clicks the <Set Password> button

b. Create Back-up User Administrator

- i. User clicks the Manage tab at the top of the screen; Manage, Insurer Management sub-tab is displayed
- ii. User Administrator clicks User Management sub-tab; *User Search* screen is displayed
- iii. If back-up User Administrator had this role during previous launch,
 - I. Enter first and last name in search field; click the <Search> button; the "Search Results" screen is displayed
 - II. Click on the User name; *Add/Edit User* screen is displayed
 - III. User Administrator clicks the <Reset Password> button
- iv. If the Back-up User Administrator is a new user to HCAI,
 - I. User Administrator clicks the <Add New User> button; *Add/Edit User* screen is displayed
 - II. User Administrator enters data in all mandatory fields (all fields marked with an asterisk "**"); user selects "Insurer" from the "What level of access do you want to give to user?" drop-down list; "Assign Role and responsibilities to the User" section appears
 - III. User Administrator clicks the "Insurer User Administrator" box; then clicks the <Submit> button
 - IV. Error message is displayed requesting that an email address be entered in email field—User Administrator enters valid & active email address in email field, then clicks the <Submit> button two times
- v. User name and temporary password are displayed; and an email with the user name and password is sent to the back-up User Administrator; User Administrator clicks the <Done> button

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2.) Organization Management: Review All Information Regarding Organization Head Office and Branches

HCAI requires accurate and current Insurer information.

- a. User Administrator clicks on the Manage, Insurer Management sub-tab
- b. "Insurer Details", "Configuration Management" and "Browse Branches" sections are displayed on screen
- c. User Administrator clicks on each Branch name, reviews information contained in each section and determines whether or not information displayed is accurate/correct/relevant
- d. User Administrator updates information (if necessary) and clicks the <Save> button

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3.) **User Management: Reset Passwords for Support Staff with Branch Level Access (Claim/Claim Administrators, Plan/Invoice Managers, Report Viewers), Deactivate Users No Longer with the Organization**

The first group of users whose password should be reset is the support staff who will be assisting in entering new claims data. All support staff with Branch level access must have new passwords that satisfy HCAI's password security requirements. Previous passwords from HCAI are now suspended and are required to be reset. If Users at Branch level have left the company, it is an important secondary step to ensure they are deactivated in HCAI.

I. Prepare a list of all active Users in the system

- a. User Administrator logs in to HCAI
- b. User Administrator clicks the Manage tab
- c. User Administrator navigates to the User Management sub-tab; the *User Search* screen appears
- d. User Administrator clicks the "Active" box, then clicks the <Search> button
- e. *Search Results* screen appears with all users already set-up in the HCAI system
 - i. All users will have the status of Active - Suspended
- f. User Administrator downloads the list of all users by highlighting all entries, then copies and pastes into a Word document or Notepad file*

*User Administrator will isolate users with branch level access and the Claim/Claimant administrator role whose password should be reset

 - i. From the list of active users, prepare a list of all Claim/Claimant Administrators requiring password resets
- g. User Administrator clicks the User Management sub-tab; the *User Search* screen appears
- h. User Administrator enters the user's first and last name, then clicks on the <Search> button; *Search Results* screen appears
- i. User Administrator identifies the individual whose password is required to be reset
- j. User Administrator clicks on the name; *Add/Edit User* screen appears
 - i. User Administrator determines whether or not a valid email address is contained within the user's email field in the "Edit/View User Details" section
- k. User Administrator clicks the <Reset Password> button; *Temporary Password* screen appears
- l. If the email of the User has been entered, all information will be emailed directly to the user. If the email has not been entered the User Administrator must provide the Claim/Claim Administrator with the username, temporary password and link to HCAI
- m. User Administrator repeats this process for each user who will be providing support for claim/claimant administration in HCAI

II. To deactivate users no longer with the organization,

- a. Review list of active users, identify those who left the company
- b. Log into the HCAI system with the User Administrator profile; Manage tab is displayed

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- c. Navigate to the User Management sub-tab
- d. Scroll down to the “Search for Users” section, click the “Active” box next to the “User Status” section, then click the <Search> button
- e. Locate all Branch level users who are no longer with the organization or involved with HCAI
- f. Click on a Branch level user’s name who is no longer with the organization; the *Add/Edit User* screen for this user appears
- g. Click the <Deactivate> button located to the right hand side of the User Management sub-tab; the screen refreshes and the <Activate> button appears where the <Deactivate> button was located
- h. Repeat this process for all Branch level users who are no longer with your organization and are required to be deactivated

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4.) Add New Adjusters

In some cases, there may have been turnover in Accident Benefit Adjusters staff. The organization created on HCAI needs to reflect the current organization structure. Adding Adjusters to HCAI is, however, a two-step process.

a. Part 1 – Add Adjusters to the Insurer Organization Structure

- i. Log into the HCAI system with the User Administrator profile; Manage tab is displayed
- ii. Go to the “Browse Branches” Section & click on a Branch name; *Branch Details* screen is displayed
- iii. Scroll down to the “Associated Adjusters” section
- iv. Identify and click <Add New Adjuster> button; *Add/Edit Adjuster* screen appears
- v. Fill in all mandatory (marked with asterisks, “**”) fields on the *Add/Edit Adjuster* screen, then click the <Save> button
- vi. Continue process detailed in steps i-v above, and create as many Adjusters as are required for each Branch; on a separate piece of paper or cheat sheet, write down the first and last name of each Adjuster created

b. Part 2 – Add Adjusters as Users to HCAI

- i. Log into the HCAI system with the User Administrator profile; Manage tab is displayed
- ii. From the *User Management* sub-tab click on the <Add New User> button; *Add / Edit User Details* screen is displayed
- iii. Fill out details for each Adjuster who is new to the organization, and in the “Add / Edit / View User Details” section, fill out the mandatory fields (all fields marked by an asterisk, “**”)
- iv. Select “Adjuster” from “What level of access do you want to give to user?” drop-down list; “Assign Roles & Responsibilities to the User” and “Grant Access Rights to the User” sections are displayed
- v. In the “Assign Roles and Responsibilities” section under “Adjusting Roles”, click on “Plan/Invoice Adjuster”; “Plan/Invoice Adjuster” box is marked
- vi. Confirm the Adjusters and Branches shown in the “Access Rights to User” reflect those created during the organization creation section
- vii. Click on the name of the Adjuster you are adding, then click the arrow () button to provide the Adjuster with access to his/her own Worklist
 - I. Follow this same process to provide the Adjuster being added with access to any other Adjusters in the “Available Adjusters” list
- viii. Click on the <Submit> button, then click <Submit> again; Username and temporary password are displayed
- ix. When the email address of the user was entered, s/he will receive his/her user name and temporary password automatically. If the email address was not entered, the User Administrator will be responsible for sharing this information with the user

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5.) Run Report on Active Claimants Associated with Adjusters (or Claimant Search)

Active claimant data may be located in HCAI that is associated with Adjusters who no longer remain with a specific Insurer, or who now perform a new role with a particular organization. Creating an Adjuster-specific active claimant report will allow you to identify which claimants (if any) need to be reassigned or deactivated within HCAI. Prior to running any claim or claimant reports, you will first need to assign the User Administrator who will perform this step with the Claim/Claimant Administrator role.

- a. Log in to HCAI as User Administrator
- b. Navigate to the Manage, User Management sub tab
 - i. Scroll down to the "Search for Users" section, click the Insurer User Administrator box in the "Insurer Roles" sub section, then click <Search>
 - ii. List of User Administrators appears; locate the User Administrator who will requires the Claim/Claimant Administrator role and click on his/her name
 - iii. The Add/Edit User screen appears; scroll down to the "Assign Role & Responsibilities to the User" section
 - iv. Click the Claim/Claimant Administrator box, then click the <Submit> button
 - v. The screen refreshes, the User Administrator reviews the information displayed; if all information is correct, the User Administrator then clicks the <Submit> button*
 - *If the User Administrator is assigning himself/herself the Claim/Claimant Administrator role, upon hitting submit the first time, s/he will receive this error message after hitting the <Submit> button once – 'You are modifying your own account. You will be forced to re-login if you submit this information.'
 - vi. The User Administrator logs out
- c. Log back in to HCAI as User Administrator
- d. Click the Claims tab, then click the Claimants sub-tab; *Claimant Search* screen appears
- e. Scroll down to the "Search for Claimants" section
- f. Select an Adjuster from the Adjuster drop-down list
- g. For claimant status, click the "Active" box
- h. Click the <Search> button; a list of active claims for the selected Adjuster appears
- i. Highlight onscreen list using mouse or by pressing Ctrl + A, then copy list and place into MS Word document or Notepad file*
- *You may choose to use the saved list to re-assign or deactivate claimants on HCAI
- j. Repeat the above steps for each Adjuster in your organization

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6.) Re-assign / Deactivate Claim-Claimants Where Necessary

Claim-claimant information may need to be reassigned or deactivated in HCAI when a specific Adjuster is no longer with your organization, or if the user in question is no longer an Adjuster.

- a. Log in to HCAI as User Administrator
- b. Click the Claims tab, then click the Claimants sub-tab; *Claimant Search* screen appears
- c. For re-assigning claim-claimants,
 - i. Enter in the last name of an active claim-claimant from the list of active claim-claimants generated for each Adjuster in Step 5; the *Search Results* screen appears
 - ii. Click on the claimant name; the *Claimant Details for [last name, first name]* screen appears
 - iii. Scroll down to the "Claimant Details" section, click the Adjuster drop-down list, select an active Adjuster to which the claim-claimant will be transferred
 - iv. Click the <Save> button
 - v. If the claim-claimant has been correctly reassigned, the following message will appear in green text at the top of the page, viz. 'The claimant has been successfully updated'
- d. For deactivating claim-claimants,
 - i. Enter in the last name of an active claim-claimant from the list of active claim-claimants generated for each Adjuster in Step 5; the *Search Results* screen appears
 - ii. Click on the claimant name; the *Claimant Details for [last name, first name]* screen appears
 - iii. Scroll down to the "Claimant Details" section, click the <Deactivate> button, located next to the <Save> and <Cancel> buttons
 - iv. Once the claim-claimant has been deactivated,
 - I. The <Activate> button appears where the <Deactivate> button was previously located, and
 - II. The following update message appears in green text at above the "Claimant Details" section, viz. 'The claimant has been successfully deactivated'

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7.) Deactivate “Old / No longer active” Adjusters

Adjusters who are no longer active employees for a particular organization must be deactivated in HCAI to ensure claim-claimant information and corresponding OCFs do not become associated with “Old / No longer active” HCAI Adjusters.

Compile list of all “Old / No Longer Active” Adjusters and their associated Branches

- a. Log into the HCAI system with the User Administrator profile; Manage tab is displayed
- b. Navigate to the User Management sub tab
 - i. Scroll down to the “Search for Users” section, click the “Active” box next to User Status
 - ii. Move to the “Insurer Roles” subsection, click the “Plan/Invoice Adjuster” box, then click the <Search> button
 - iii. Compare the list of “Old / No longer active” Adjusters with the list of active adjusters found on the *Search Results* screen(s)*

*The list of adjusters the User Administrator views can be increased or decreased in size by clicking the drop-down list above the status column
 - iv. Locate an “Old / No longer active” adjuster, and click the Adjuster’s name; the *Add/Edit User* screen for this Adjuster appears
 - v. Click the <Deactivate> button sitting at the right hand side of the User Management sub-tab; the screen refreshes and the <Activate> button appears where the <Deactivate> button was previously located
- c. After all the Adjusters from the “Old / No longer active” list have been deactivated from the User Management sub-tab, the User Administrator clicks the Insurer Management sub-tab
 - i. User Administrator scrolls down the *Insurer Management* screen and locates the “Browse Branches” section
 - ii. User Administrator identifies a Branch to which an “Old / No longer active” Adjuster is associated; User Administrator clicks on the Branch Name
 - iii. *Branch Details* screen appears and User Administrator scrolls down to the “Associated Adjusters” section
 - iv. User Administrator locates “Old / No longer active” Adjuster, then deactivates the user by clicking the <Deactivate> button; screen refreshes and the <Activate> button appears where the <Deactivate> button was previously located
 - v. User Administrator repeats the process for every “Old / No longer active” Adjuster contained in HCAI

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8.) Add All Active Claim-Claimant Data


Only users with the claim and claimant administrator role can add new claims in HCAI. In order for OCFs submitted by Facilities to be matched with the claims and claimants, active claim-claimant data must be added to an Insurer's HCAI profile.

- a. Log into HCAI as a user with Claim/Claimant Administrator role
- b. Click the Claims tab; the *Claim Search* screen appears
 - i. Click the "Add Claim" button located in the "Add a New Claim" section of the *Claim Search* screen; the *Claimant Details* screen appears.
 - ii. Select an Insurer from the "Insurer" drop-down list. The set of Insurers available for selection is determined by your domain.
 - iii. Specify the claim number, policy number, and policy holder's first and last name in the respective fields.
 - iv. Enter the date of accident in YYYY/MM/DD format, or click on the icon to engage the calendar feature.
 - v. Click the <Save> button. If any information is missing or invalid, an error message appears at the top referring you to the field in error. Successfully saving the information brings forward the three sections described below:
 - I. **State.** This section shows the status of the claim and its latest version. When you create a new claim, the status is "Active" and the latest version is "1"
 - II. **Activity Log.** This section contains a list of activities associated with the current claim. It shows: "Date & Time" (when the activity occurred), "Description" (the type of activity), "Version," "In Dispute" and "Actor" (the author of the activity)
 - III. **Associated Claimants.** This section shows a list of claimants associated with your claim. When you create a new claim, the list contains no records
 - vi. Click the <Save> button; the screen refreshes and the following message appears above the "Claim Details" section, viz. 'The Claim has been successfully added'
- c. Scroll down to the "Add Claimant" section (located below the "Associated Claimant" section)
- d. Click the <Add Claimant> button; the *Claimant Details* screen appears
- e. Enter the claimant's information in all the fields marked by "*"; then click the <Save> button
- f. The screen refreshes and the following message appears above the "Claim Details" section, 'Claimant was successfully added to the claim'

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9.) Reset Remaining User Passwords, Add New Users as Needed

All passwords from the old HCAI application are no longer active in HCAI. For this reason, all users whose passwords have not yet been reset must now be reset. At this time, all outstanding new users to HCAI should also be added.

- a. Prepare a list of all remaining users still needing to be unsuspending in HCAI
- b. User Administrator logs in to HCAI; User Administrator then clicks the Manage tab
- c. User Administrator navigates to the User Management sub tab; the *User Search* screen appears
- d. For resetting remaining user passwords,
 - i. User Administrator enters in last name and first name of User, then clicks the <Search> button
 - ii. The *Search Results* screen appears, User Administrator clicks on the user's name; *Add/Edit User* screen appears
 - iii. User Administrator determines whether or not a valid email address is contained within the user's email field in the "Edit/View User Details" section
 - iv. For Adjusters,
 - I. Scroll to the "Grant Access Rights to the User" section
 - II. Scan the "Old/No longer active" Adjusters list to determine whether any users listed are associated with active Adjusters in the aforementioned section
 - III. If an "Old/No longer active" Adjuster is associated with an active Adjuster,
 - a. In the "Grant Access Rights to the User" section, click on the "Old/No longer active" Adjuster's name in the "Selected Adjusters" field
 - b. Click on the  button; this will remove the "Old/No longer active" Adjuster from the "Selected Adjusters" list
 - IV. If no "Old/No longer active" Adjusters exist that are associated with an active Adjuster, select additional Adjusters for the user to have access to (**including** the Adjuster selected); click the <Submit> button
 - v. The screen refreshes and the User Administrator is brought to the *User Search* screen
 - vi. User Administrator enters in last name and first name of User just updated, then clicks the <Search> button
 - vii. The *Search Results* screen appears, User Administrator clicks on the user's name; *Add/Edit User* screen appears
 - viii. User Administrator clicks the <Reset Password> button; *Temporary Password* screen appears
 - ix. User Administrator then clicks <Done>
 - x. User Administrator must provide the user with the username, temporary password and link to HCAI when a valid email address is not associated with the Report Viewer's profile
 - xi. User Administrator repeats this process for each user contained in his or her password reset list

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- e. For adding new users,
 - i. User Administrator clicks the <Add New User> button; *Add/Edit User* screen appears
 - ii. User Administrator enters proposed new user's information in all relevant fields*
Fields marked by an "" are required
 - iii. User Administrator selects a level of access from "What level of access do you want to give to user?" drop down list to assign to the user; "Assign Roles & Responsibilities to the User" and "Grant Access Rights to the User" sections are displayed
*The level of access granted to a specific user typically depends on the role(s) that apply to that same user—it is not uncommon for a user to have multiple roles within an organization
 - iv. User Administrator determines the level of access for the user via the drop-down list, then scrolls to the "Grant Access Rights to the User section", determines the access rights of the user, then clicks <Submit>
 - v. The screen refreshes to provide User Administrator with a view of the following sections – "User Details", "Level of Access", "Roles and Responsibilities assigned to the User", and "Access Rights granted to the User"
- f. User Administrator reviews information displayed for accuracy and relevance; if information is correct, User Administrator clicks <Submit>
- g. Username and temporary password are displayed
- h. User Administrator completes steps "b" through "f" for each new user added to HCAI

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10.) **Activate the Insurer(s)**

In accordance with the FSCO List of HCAI Participants, an Insurer is required to be “live” on HCAI on the start of business hours on their designated live date. Once the <Activate> button is clicked, the Insurer is now available to be selected to receive OCFs sent by Health Care Facilities. The creation and set-up of Branches, Adjusters and other users does not result in an activated Insurer. To activate your organization, follow the steps listed below:

- a. Log in to HCAI as a user with the Organization Administrator role
- b. Click the Manage tab
- c. If you are not immediately directed to the Insurer Management sub-tab, click on the Insurer Management sub-tab
- d. Click the <Activate> button located just above the “Insurer Details” section on the Insurer Management screen
- e. Once the <Activate> button is clicked, the following message appears on screen:
 - i. ‘Are you sure you want to activate this insurer?’
- f. Click “OK” or “Yes”
- g. Where the <Activate> button was once located. a <Deactivate> button is now found
- h. Your organization is now active