

HCAI 6 Step Re-enrolment – Non-Migrating Insurers

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1. Re-Enrolment Forms

- 1.1. Each Insurer must complete the HCAI Electronic Insurer Acknowledgement Form.
- 1.2. Your original HCAI enrolment forms should be reviewed as a reference.
- 1.3. A choice is provided as to whether or not you want to migrate your insurer set-up and claim-claimant data from the old production environment to the new system.
 - 1.3.1. If you choose not to migrate your data, you will need to create your organization and users as well as enter all your open claim and claimant data.
- 1.4. Confirm whether the individual identified as the System User and Organization Administrator in Section E of the original form is still the person who will receive the HCAI logon User ID and temporary password for the new system
 - 1.4.1. If the System User and Organization Administrator has changed, then provide the new contact information, his/her employee ID and select a preferred and 2 alternate HCAI Logon IDs.
- 1.5. Identify your chosen date from the list of possible dates to go live in the production environment.
- 1.6. The form should be completed as early as possible so it may be verified for accuracy.

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2. Verification of Organization Set-up

- 2.1. Once the forms are submitted to the HCAI team, you will receive your first User ID and Password approximately two weeks prior to your live date.
 - 2.1.1. Upon first log-in, the User Administrator will review the Insurer Management tab and the Insurer Details that have been entered by the administrator in accordance with the enrolment forms.
- 2.2. Above the Insurer Details there is a blue button with the word “ACTIVATE”. This indicates that the insurer is currently in a deactivated state
 - 2.2.1. It is the Insurer’s responsibility to click the “ACTIVATE” button on the day the company is to go live on HCAI.
 - 2.2.2. Once the “ACTIVATE” button is pressed, health care facilities will be able to view your insurance company name on a drop-down list to submit forms. **Do not activate your company prior to your enrolment date.**

The screenshot shows the HCAI 'Consolidated Direct' interface. At the top, there is a 'MANAGE' tab and a 'LOGOUT' button. Below this, the 'INSURER MANAGEMENT' tab is active, showing 'INSURER MANAGEMENT' and 'USER MANAGEMENT' sub-tabs. The date '2007/09/26' is displayed in the top right corner. The main content area is titled 'Fill in the fields to add or edit an Insurer' and includes a note: 'NOTE : All fields with an asterisk (*) are required.' The 'Insurer Details' section contains a form with the following fields: Insurer Status (Deactivated), * Insurer Name (Consolidated Direct), * IBC ID (99887), * Address (10 Smiths Line), * City (Toronto), * Province (ON - Ontario), * Postal Code (M7B 5T5), * Phone ((416) 675-9390), Fax, Contact 1 Name (Al James), Contact 1 Phone ((416) 975-8310), Contact 1 Email (abrand@ibc.ca), Contact 2 Name, Contact 2 Phone, and Contact 2 Email. A red arrow points to the 'ACTIVATE' button. Below this is the 'Configuration Management' section with radio button options for: * Virtual Insurer? (No/Yes), * Outbound Payment Feed? (No/Yes), * Inbound Claim / Claimant Feed? (No/Yes), * Outbound Insurer Extraction? (No/Yes), and * Privacy Consent? (No/Yes). A red arrow points to the 'ADD NEW BRANCH' button. At the bottom, there is a 'Browse Branches' section with a table header for 'Branch Name', 'City', and 'Status', and 'CANCEL' and 'SAVE' buttons. The footer contains the text: '© 2007 Health Claims for Auto Insurance Processing | Privacy Policy | Change Password'.

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3. Adding Branch Details

3.1. Every Insurer is required to create a Branch even if the address identified in the re-enrolment document is the insurer's only location.

3.1.1. To add a new Branch hit the blue "Add New Branch" button at the bottom of the page.

3.1.2. Add multiple branches if necessary.

4. Adding Adjusters to the Branches created

4.1. Every branch will have adjusters that can be assigned Accident Benefits claims.

4.1.1. Hit the button under the branch details which states "add new adjuster".

4.1.2. Add all adjusters to the branch, who could be assigned claims including independent adjusters.

Add / Edit / View Details of "Aurora" DEACTIVATE ADD BRANCH

New Branch created.

Branch Status: Active

* Branch Name: Aurora

* Branch ID: 887

* Address: 12 Millcroft Mews

* City: Aurora

* Province: ON - Ontario

* Postal Code: L9L 7Y7

* Phone: (905) 664-9610

Fax:

Contact 1 Name: Allison Brand

Contact 1 Phone: (905) 667-9988

Contact 1 Email: abrand@ibc.ca

Contact 2 Name:

Contact 2 Phone:

Contact 2 Email:

CANCEL SAVE

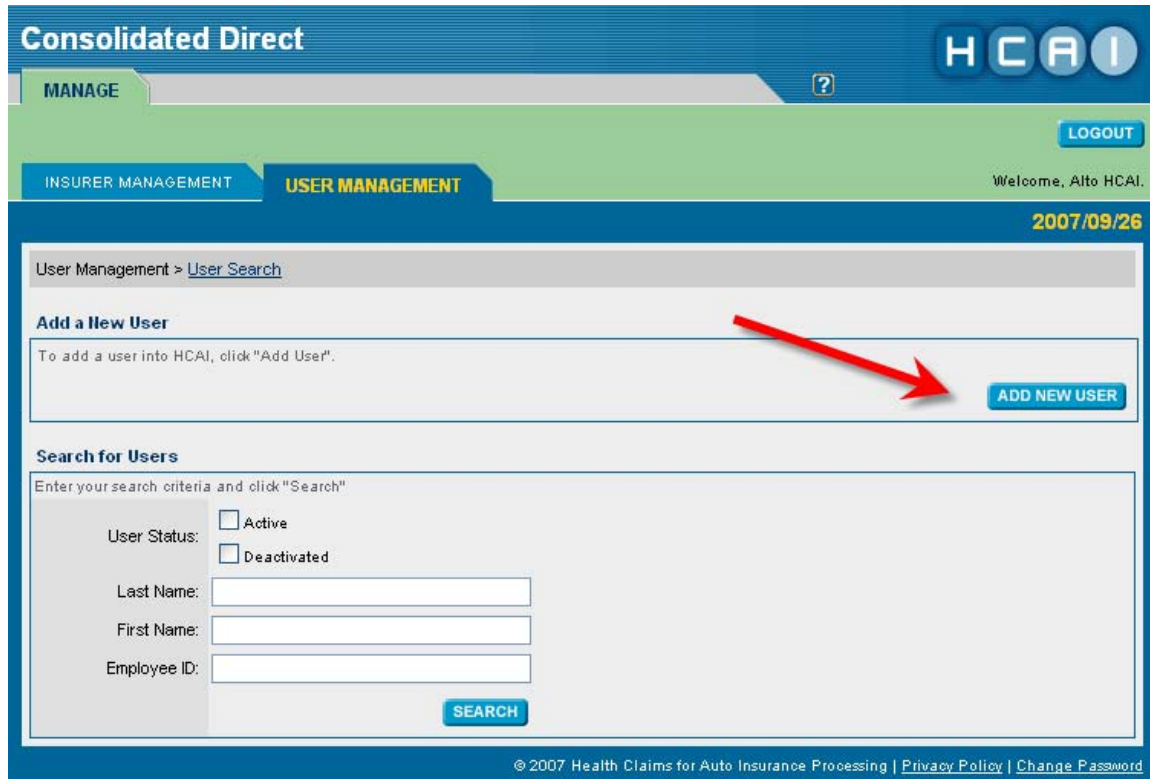
Associated Adjusters

Adjuster ID	Adjuster Name	Status
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ADD NEW ADJUSTER

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5. User Administration



The screenshot shows the HCAI Consolidated Direct interface. At the top, there is a blue header with 'Consolidated Direct' and the HCAI logo. Below the header, there are navigation tabs: 'MANAGE', 'INSURER MANAGEMENT', and 'USER MANAGEMENT'. The 'USER MANAGEMENT' tab is selected. On the right side, there is a 'LOGOUT' button and a welcome message 'Welcome, Alto HCAI.' and the date '2007/09/26'. The main content area is titled 'User Management > User Search'. It contains two sections: 'Add a New User' and 'Search for Users'. The 'Add a New User' section has a text box with the instruction 'To add a user into HCAI, click "Add User".' and a blue 'ADD NEW USER' button. A red arrow points to this button. The 'Search for Users' section has a text box with the instruction 'Enter your search criteria and click "Search"'. It includes checkboxes for 'Active' and 'Deactivated' under 'User Status:', and input fields for 'Last Name:', 'First Name:', and 'Employee ID:'. A blue 'SEARCH' button is at the bottom of this section. At the bottom of the page, there is a footer with the text '© 2007 Health Claims for Auto Insurance Processing | Privacy Policy | Change Password'.

5.1. User and Organization Administrator moves from the Insurer Management tab to the User Management tab.

5.2. Everyone requiring access to the system should be set-up as a user.

5.2.1. The first user to the system is set-up by the HCAI administrator and has the User and Organization Administrator roles

5.2.2. This first user should immediately set-up an additional user with User and Organization Administrator roles as these roles allow for the user to reset passwords.

It is important for the initial User & Organization Administrator to create another User & Organization Administrator (with the same role and level of access) to serve as a back-up in the event that a password is suspended.

5.3. Each User will need to be set-up with a level of access, roles and responsibilities, and access rights. For a full description please refer to Chapter 11 of the Insurer User Manual or the [Insurer User Role Table](#) located at www.hcaiinfo.ca.

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6. Enter Claim / Claimant Information

- 6.1. All claim and claimants should be set-up in the HCAI system and assigned to particular adjusters.
- 6.2. Once claim and claimants have been entered and a form is received from a Health Care Facility it will be routed directly to an adjuster's worklist who has been assigned to handle the claimant identified on the form
- 6.3. To enter a new claim you must have the Claim/Claimant Administrator role
 - 6.3.1. Once you have logged into the system Move to the Claims tab and hit the "add claim" button

The screenshot displays the HCAI system interface. At the top, there is a navigation bar with tabs for 'PLANS', 'INVOICES', 'CLAIMS', 'SEARCH', and 'MANAGE'. The 'CLAIMS' tab is currently selected. Below the navigation bar, there is a search area with a text input field for 'Search for Claim #', a dropdown menu for 'All Forms', and a 'GO' button. A 'LOGOUT' button is also visible. The main content area is divided into sections: 'General Notification' (stating 'No records were found.'), 'Add a New Claim' (with a red arrow pointing to the 'ADD CLAIM' button), and 'Search for Claims' (with various search criteria fields and a 'SEARCH' button). The footer contains copyright information: '© 2009 Health Claims for Auto Insurance Processing | Privacy Policy | Change Password'.

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- 6.4. Once you have successfully entered the claim, all claims require claimants
- 6.5. Scroll to the bottom of the claims tab where it displays Associated Claimants
 - 6.5.1. Click on the “add claimant” button
 - 6.5.2. Continue this process until all claim and claimants have been added to the HCAI system
- 6.6. For more information concerning the management of claims and claimants please visit www.hcaiinfo.ca and review the Claims Administrator tab

The screenshot displays the HCAI web application interface. At the top, there is a navigation bar with tabs for 'PLANS', 'INVOICES', 'CLAIMS', 'SEARCH', and 'MANAGE'. The 'CLAIMS' tab is currently selected. To the right of the navigation bar, there is a 'User Manual' link and the HCAI logo. Below the navigation bar, there is a search bar with the text 'Search for Claim #' and a dropdown menu for 'All Forms'. A 'GO' button and a link to 'Advanced' search are also present. A 'LOGOUT' button is located in the top right corner. The main content area has a sub-navigation bar with 'CLAIMS' and 'CLAIMANTS' tabs. The 'CLAIMS' tab is active. The date '2010/01/27' is displayed in the top right corner of the main content area. The breadcrumb trail shows 'Claims > Claim Search > Add Claim'. The 'Claim Details' section contains a form with the following fields: '* Insurer:' (dropdown menu with 'Ports Insurance' selected), '* Branch:' (dropdown menu), '* Claim #:' (text input), '* Policy #:' (text input), '* Policy Holder Last Name:' (text input), 'Policy Holder First Name:' (text input), and '* Date of Accident:' (calendar icon). At the bottom of the form are 'SAVE' and 'CANCEL' buttons. The footer contains the text '© 2009 Health Claims for Auto Insurance Processing | Privacy Policy | Change Password'.