

Quick Start Guide: HCAI Go-Live

This guide is a visual support to the Re-Enrolment Steps document found at www.hcaiinfo.ca website in the Insurer, Re-enrolment section.

Assurance Nationale PLC

MANAGE ? - User Manual HCAI LOGOUT

INSURER MANAGEMENT USER MANAGEMENT Welcome, Ronaldinho to HCAI. 2009/12/10

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

Insurer Details **ACTIVATE**

Insurer Status: Deactivated
 * Insurer Name: Assurance Nationale PLC
 * IBC ID: 789456
 * Address: 855 Gramic Place
 * City: Toronto
 * Province: ON - Ontario
 * Postal Code: M4E 8T4
 * Phone: (416) 434-1040
 Fax:
 Contact 1 Name:
 Contact 1 Phone:
 Contact 1 Email:
 Contact 2 Name:
 Contact 2 Phone:
 Contact 2 Email:

Configuration Management
 * Virtual Insurer?: No Yes
 * Outbound Payment Feed?: No Yes
 * Inbound Claim / Claimant Feed?: No Yes
 * Outbound Insurer Extraction?: No Yes
 * Privacy Consent?: No Yes

Browse Branches
 Branch Name City Status
 ADD NEW BRANCH

CANCEL SAVE

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Verifying Your Insurer Organization Set-Up

- Upon first log-in, the User & Organization Administrator reviews the Organization details
- Above the Insurer details there is a button with the word **"ACTIVATE"**.
 - At first login, the insurer is in a deactivated state
- It is the Insurer's responsibility to click the activate button at 8:00am on the day their HCAI effective date
- Do **NOT** activate your company prior to your HCAI "go-live" date.

Adding / Updating Branch Details

- Every Insurer is required to have a branch created even if the only location is the one stated in the address for the Insurer.
- When an insurer has migrated data from the previous HCAI profile, Branches will already exist
 - The first HCAI User will review the Branch name, reviews information contained in each section and determines whether or not information displayed is accurate/correct/relevant
- To add a new branch hit the "add new branch" blue icon at the bottom of the page.
- Once the Branch information has been entered, the Organization/User Administrator will click the <Save> button
- Add multiple branches if necessary.

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INSURER MANAGEMENT USER MANAGEMENT Welcome, Fernando to HCAI. 2009/12/14

Insurer Management > Assurance Nationale PLC > Branch Details
 Fill in the fields to add or edit an Insurer
 NOTE: All fields with an asterisk (*) are required.

Branch Status: Active
 * Branch Name: Kop End
 * Branch ID: 10Kop
 * Address: 10 Rush Road
 * City: Liverpool Heights, Toronto
 * Province: ON - Ontario
 * Postal Code: M5V 3V6
 * Phone: (416) 525-2005
 Fax:
 Contact 1 Name: Igor Bicar
 Contact 1 Phone:
 Contact 1 Email:
 Contact 2 Name:
 Contact 2 Phone:
 Contact 2 Email:

CANCEL SAVE

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MANAGE ? - User Manual LOGOUT

INSURER MANAGEMENT USER MANAGEMENT Welcome, Fernando to HCAI. 2009/12/15

User Management > User Search > Add / Edit User

Add / Edit / View User Details

Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click: (link to Insurer User Mgmt guide)

*Organization Type: Insurer
 *Organization: Assurance Nationale PLC
 User Status: Active
 *Last Name:
 *First Name:
 Title:
 *User Name:
 *Employee ID:
 E-mail:
 Phone:

What level of access do you want to give to user? Insurer

Assign Roles & Responsibilities to the User

Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.

Management & Administrator Roles

Organization Administrator Insurer User Administrator Plan/Invoice Manager
 Report Viewer

Support Roles

Plan/Invoice Support Claim/Claimant Administrator

Adjusting Roles

Plan/Invoice Adjuster

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User Administration Set-up

- The first user to the system is set-up by the HCAI developer, and has both the User and Organization Administrator roles.
 - Immediately set-up another user with User and Organization Administrator roles.
- If migrating, the first group of users whose password should be reset is the support staff who will be assisting in entering new claims data.
- Each User must be set-up with a level of access, roles and responsibilities and access rights.

Adding Active Claim-Claimant Data

Assurance Nationale PLC HCAI

PLANS INVOICES CLAIMS SEARCH MANAGE ? - User Manual LOGOUT

Search for Claim # in All Forms Advanced

CLAIMS CLAIMANTS Welcome, Fernando to HCAI. 2009/12/17

Claims > Claim Search

General Notification

The following items need your attention

No records were found.

Add a New Claim

To add a claim into HCAI, click "Add Claim".

- 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.

Assurance Nationale PLC HCAI

PLANS INVOICES CLAIMS SEARCH MANAGE ? - User Manual LOGOUT

Search for Claim # in All Forms Advanced

CLAIMS CLAIMANTS Welcome, Fernando to HCAI. 2009/12/17

Claims > Claim Search > Add Claim

Claim Details

Fill in the fields to add/edit a claim into HCAI

NOTE: All fields with an asterisk (*) are required

* Insurer: Assurance Nationale PLC
 * Branch: Robertson Screw
 * Claim #: 1077
 * Policy #: 905875
 * Policy Holder Last Name: Benitez
 Policy Holder First Name: Rafael
 * Date of Accident: 2009/10/07

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