



Health Claims for Auto Insurance

Understanding What You See in HCAI

Table of Contents

Contents

Understanding What You See in HCAI	3
Set Home page.....	3
Global Tabs and Sub-Tabs	4
Global Tabs	4
Plans.....	4
Invoices	5
Search.....	5
Manage.....	5
Sub-tabs.....	5
Work in Progress.....	5
Adjuster Response.....	5
Draft	6
HCAI Filters	6
General Buttons and Links in HCAI.....	7
Calendar Function	8

Understanding What You See in HCAI

This manual is intended to assist users in using the HCAI application by outlining the system interface and describing the various tabs and sub-tabs.

Set Home page

The Plans tab is by default the first screen that Health Care Facility Users will see upon logging in to HCAI. At the bottom left of the page is a checkbox that says 'Set as home page'. This checkbox appears on every global tab and sub-tab in HCAI.

Navigate to the tab you would like to see first upon logging in to HCAI, and check the 'Set as home page' checkbox. HCAI will save your preference and every subsequent login will bring you immediately to your preferred home page. The preferred home page can be changed at any time.

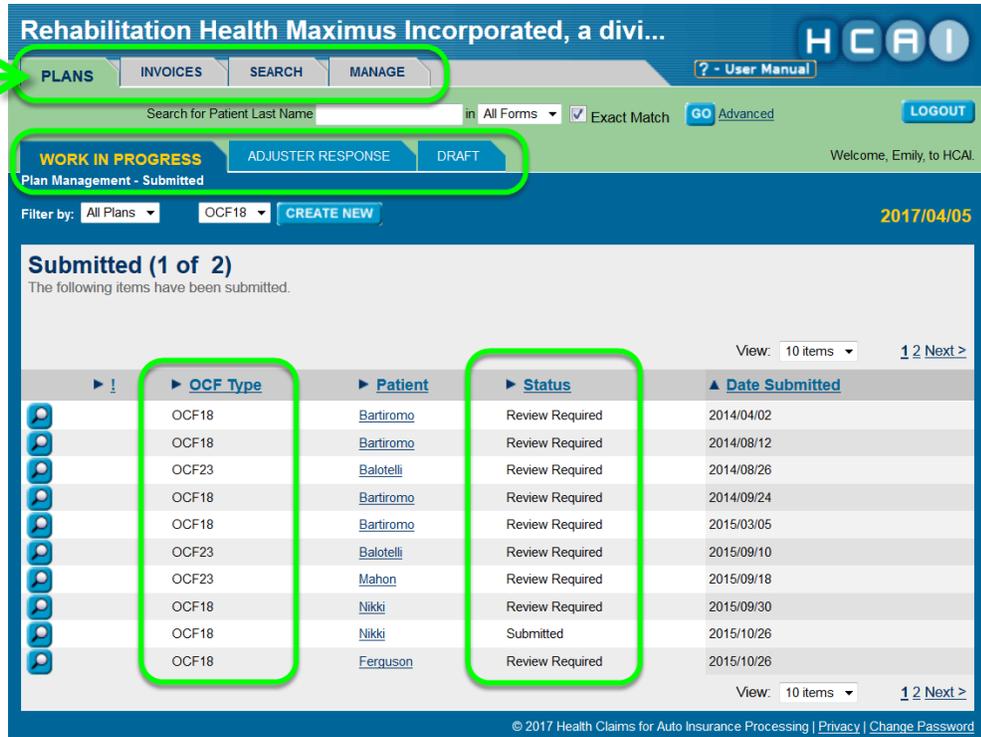
Navigate to your preferred tab and click this box to set the tab as your home page

The screenshot shows the HCAI application interface. At the top, there's a navigation bar with tabs: PLANS, INVOICES, SEARCH, MANAGE, and HCAIInfo. Below this is a search bar for Patient Last Name. The main content area is titled 'Draft (1 of 1)' and contains a table of items. At the bottom left, there is a checkbox labeled 'Set as home page'.

<input type="checkbox"/>	<input type="checkbox"/>	OCF Type	Patient	Date Modified
<input type="checkbox"/>	<input checked="" type="checkbox"/>	OCF18	June	2018/08/28
<input type="checkbox"/>	<input checked="" type="checkbox"/>	OCF23	Dallaire	2018/08/28
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Form 1	Any	2018/03/21

DELETED

Set as home page | HCAI System Status

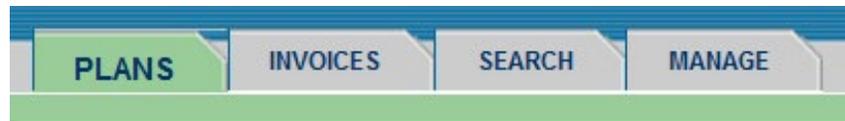


The global tabs, sub-tabs, list of submitted OCFs and the OCF status are all visible on the facility homepage.

Global Tabs and Sub-Tabs

Global Tabs

In HCAI, there are four main global tabs: *Plans*, *Invoices*, *Search* and *Manage*. Within each global tab there are sub-tabs that provide information or allow for various functions. The global tab you are in will be highlighted in green. To move to another tab, simply click on that tab.



Plans

This tab is the first tab you will see on the Facility homepage in HCAI. Within this tab there are three sub-tabs: *Work in Progress*, *Adjuster Response*, and *Draft*. All the worklists and functions within this tab are related to OCF-18, OCF-23, and Form 1.

Invoices

This is the main navigation tab for the *Invoices* worklists. Within this tab you will see three sub-tabs: *Work in Progress*, *Adjuster Response*, and *Draft*. All the worklists and functions within this tab are related to OCF-21B and OCF-21C.

Search

Within the *Search* tab there is one sub-tab: *Document Search*. This section allows you to search for all OCFs by entering various search criteria. In order to view the *Document Search* sub-tab, you must first select the *Search* global tab.

Manage

This is the main navigation tab for accessing reports, managing your Facility and updating User information. Within this tab you will see three sub-tabs: *User Management*, *Reports* and *Facility Management*. In order to view any of the three sub-tabs, you must first select the *Manage* global tab.

Sub-tabs

The *Plans* and *Invoices* global tabs each have four identical sub-tabs. The sub-tab that you are in will be marked with yellow font. To view any of these sub-tabs, you must first select the *Plans* or *Invoices* global tab.



Work in Progress

This sub-tab displays all the forms that have been submitted to Insurers.

Adjuster Response

This sub-tab displays all the forms that have been adjudicated by the Insurers.

Draft

This sub-tab displays all the forms that have been saved by a Health Care Facility. Documents in this section can be reopened, then completed, edited or deleted.

HCAI Filters

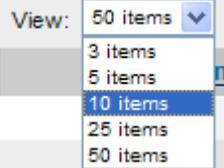
Throughout HCAI, there are drop-down menus that allow you to modify your lists. Click on the drop-down menu to view or create specific OCFs or to display more or less items in a workload.

Various drop-down menus in HCAI allow you to filter results and change how you view OCFs in HCAI.

The screenshot displays the HCAI interface for 'Rehabilitation Health Maximus Incorporated, a divi...'. The top navigation bar includes 'PLANS', 'INVOICES', 'SEARCH', and 'MANAGE'. The search bar contains 'Search for Patient Last Name' and 'All Forms' with an 'Exact Match' checkbox. The 'Draft' sub-tab is active, showing 'Plan Management - Submitted' and 'OCF18' filter. A table lists OCFs with columns for OCF Type, Patient, Status, and Date Submitted. The table contains 10 rows of data. The footer includes '© 2017 Health Claims for Auto Insurance Processing | Privacy | Change Password'.

OCF Type	Patient	Status	Date Submitted
OCF18	Bartiromo	Review Required	2014/04/02
OCF18	Bartiromo	Review Required	2014/08/12
OCF23	Balotelli	Review Required	2014/08/26
OCF18	Bartiromo	Review Required	2014/09/24
OCF18	Bartiromo	Review Required	2015/03/05
OCF23	Balotelli	Review Required	2015/09/10
OCF23	Mahon	Review Required	2015/09/18
OCF18	Nikki	Review Required	2015/09/30
OCF18	Nikki	Submitted	2015/10/26
OCF18	Ferguson	Review Required	2015/10/26

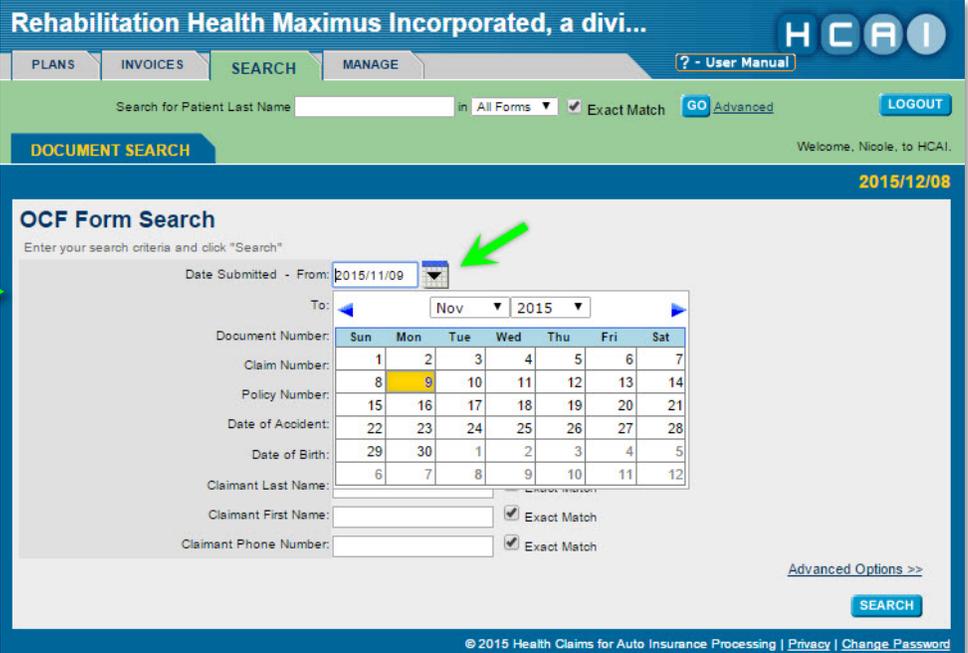
General Buttons and Links in HCAI

Button/Link	How it Looks	What it Does
Create New		Generates a blank copy of a selected OCF.
Delete		Deletes unwanted forms in the Drafts sub-tab. Check the box next to a form and hit "Delete" to remove that form from your list.
Go		Type a patient's last name into the field provided and click this button to retrieve a list of patients with that last name.
Review Form		Allows you to view the details of a form.
Search		Provides a similar function to the "Go" button. Fill in the search criteria and click this button to generate a list.
Advanced Search		Provides a detailed search screen where you can quickly find a specific OCF.
Add New User		Takes the User to the "Add/Edit/View User Details" screen to add new HCAI users for your Facility.
User Manual		Opens a separate window that takes you to the Facility Web User Manual on HCAInfo.ca.
Logout		Formally ends your session in HCAI and logs out your credentials (recommended). When a User logs out this way, HCAI will remember the order of the User's worklists.
Page Links		Allows you to select other pages and displays the number of pages available. The page being currently viewed will be in bold. Click "Next" to move to the following page or click on a page number to go to that page.
Exact Match	<input checked="" type="checkbox"/> Exact Match	When checked, generates patient or form search results <i>identical</i> to the criteria entered. By default, the Exact Match function is checked.
Save		Keeps changes made to information on HCAI. If the "Save" button is not clicked, any changes made will be deleted.
Number of items (forms) displayed per page		Increase or decrease the number of items or forms listed on each page.

Calendar Function

Use the calendar function to specify a date range when searching for OCFs and reports or to enter dates when filling out forms.

Click  to view the current month and date (highlighted in yellow). To select a different month, use the navigation arrows located on the top left and right corners of the calendar and click on the date. To enter in today's date, place your cursor in the field and hit CTRL-T from your keyboard.



The screenshot shows the HCAI (Health Claims for Auto Insurance Processing) interface. At the top, there are navigation tabs for PLANS, INVOICES, SEARCH, and MANAGE. Below these is a search bar for Patient Last Name and options for search criteria. The main content area is titled "OCF Form Search" and contains a form with various search criteria. A calendar pop-up is displayed over the "Date Submitted - From:" field, showing the current date (2015/11/09) and a calendar for November 2015. A green arrow points to the calendar icon in the "Date Submitted - From:" field. Another green arrow points to the "SEARCH" button at the bottom right of the form.

Example of how the calendar function appears in HCAI.