

# What's New? Release 3.22

## February 3, 2020

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**Adjuster Edition**

# Timeline for Changes

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- HCAI System Release 3.22 goes live on **February 3, 2020.**

# #1 Form Adjusters can Review their Claim-Claimant Records

- Form Adjusters can now view their assigned claim and claimant details. Simply click on the **Claims** tab to search and browse your claim-claimant records in **read-only mode**. You can also drill down on the Claimant Summary charts on the Adjuster Dashboard.
- The Claim-Claimant Editor role is still useful for those who need to edit claim-claimant records.

The screenshot displays the Atria Insurance HCAI system interface. The top navigation bar includes tabs for DASHBOARD, PLANS, INVOICES, CLAIMS, SEARCH, and MANAGE. The CLAIMS tab is highlighted with a green circle. Below the navigation bar, there is a search area with a text input field, a dropdown menu for 'All Forms', a checked 'Exact Match' checkbox, a 'GO' button, and an 'Advanced' link. A 'LOGOUT' button is also present. The main content area shows the 'CLAIMANTS' tab selected, with a breadcrumb trail: 'Claims > Claimant Search > Search Results'. The search results are displayed as a table with the following columns: Claimant Name, Claim #, Date of Accident, Date of Birth, Branch/Claim Group, Adjuster, File Owner, Status, Document Count, Days Inactive, and Financial Summary. The table contains 9 rows of data. At the bottom of the page, there is a 'Reassign' section with a dropdown menu set to 'Adjuster' and a 'REASSIGN' button. A note below the button states: 'To reassign claimants from this page, you must refine your search. Either you have not selected a single branch/claim group, or there are no claimants that match the current search criteria.'

**Atria Insurance** HCAI

DASHBOARD PLANS INVOICES **CLAIMS** SEARCH MANAGE HCAInfo

Search for Claim Number  in   Exact Match  [Advanced](#)

CLAIMS **CLAIMANTS** Welcome, Natalie, to HCAI. 2020/01/08

Claims > Claimant Search > Search Results

Claimants - Claimants Search

**Search Results (1 of 1)**

Claimant Results for "Claimant Status: Active" View: 10 items

<input type="checkbox"/>	▲ Claimant Name	▶ Claim #	▶ Date of Accident	▶ Date of Birth	▶ Branch/Claim Group	▶ Adjuster	▶ File Owner	▶ Status	▶ Document Count	▶ Days Inactive	Financial Summary
<input type="checkbox"/>	Chris, Chris	565565	2016/09/01	1998/09/03	Oshawa	Dallaire, Natalie		Active	29	0	<a href="#">View Report</a>
<input type="checkbox"/>	Fox, Emma	565565	2016/09/01	1998/09/03	Oshawa	Don, Sady	Herbert, Shawn	Active	13	68	<a href="#">View Report</a>
<input type="checkbox"/>	Fox, Julie	6767	2018/03/01	1999/02/04	Peterborough		Brown, Janice	Active	4	0	<a href="#">View Report</a>
<input type="checkbox"/>	Klein, qfdsg	554564	2020/01/02	2002/01/02	Sophia			Active	1	0	<a href="#">View Report</a>
<input type="checkbox"/>	Lawrence, Shai-ann	122	2018/10/02	2000/10/03	Markham Branch	Atkins, Bob		Active	14	0	<a href="#">View Report</a>
<input type="checkbox"/>	Lucarelli, Samantha	852225	2019/10/01	1999/08/03	Markham Branch		Brown, Janice	Active	3	0	<a href="#">View Report</a>
<input type="checkbox"/>	Reynolds, Petrick	15951	2019/05/02	1975/05/08	Markham Branch		Neilsen, Jose	Active	7	0	<a href="#">View Report</a>
<input type="checkbox"/>	Smith, Steve	5656	2019/01/18	2000/03/02	Peterborough			Active	2	0	<a href="#">View Report</a>

View: 10 items

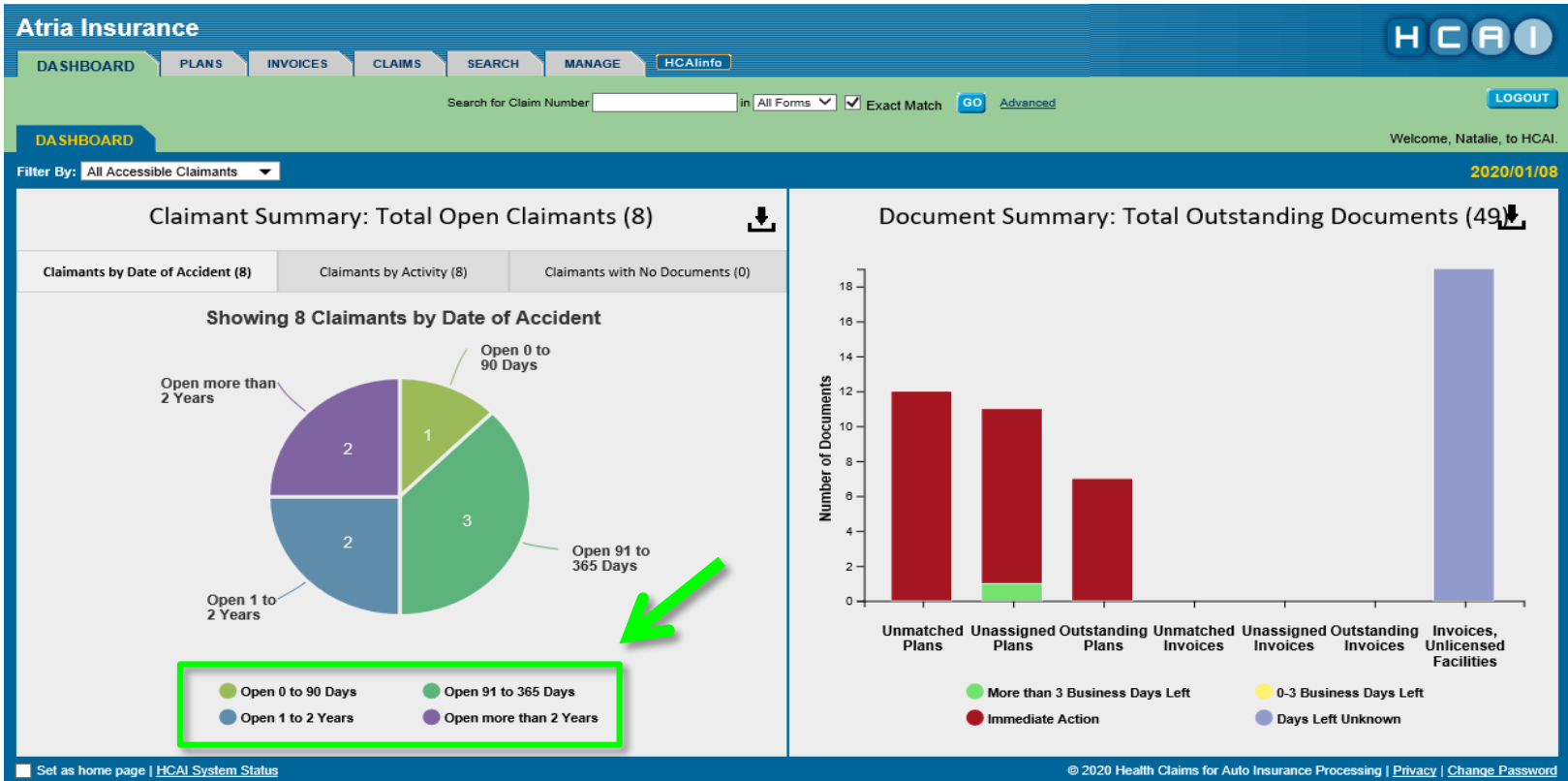
Reassign:

To reassign claimants from this page, you must refine your search. Either you have not selected a single branch/claim group, or there are no claimants that match the current search criteria.

Set as home page | [HCAI System Status](#) © 2020 Health Claims for Auto Insurance Processing | [Privacy](#) | [Change Password](#)

# #2 Updates to the Dashboard

- HCAI hosts an **improved Dashboard** to reflect your feedback by breaking the Claimant Summary pie charts down into more specific categories, to see precisely how long the claimant has been open or the date of the last activity.



# #3 OCFs Now Have Target Dates

- The **Document Search** results screen now displays a Target Date for each document, making it easy to see the date a response is due.
- This target date is calculated according to the SABS: 30 calendar days for invoices, 10 business days for the OCF-18 and Form 1, and 5 business days for the OCF-23.

**Nova Insurance**

DASHBOARD PLANS INVOICES CLAIMS **SEARCH** MANAGE HCAInfo

Search for Claim Number  in All Forms  Exact Match  [Advanced](#)

**DOCUMENT SEARCH**

**Search Results (1 of 1)**  
Document Results for "Document Type: OCF18; OCF22; OCF23; Form 1, Document Status: Submitted; Need to Discuss; Review Required, Days Left to Respond: Greater Than or Equal to 4 Business Days, Matched to Claimant?: Not Matched."

!	Document #	Claim #	Claimant	Facility Name	OCF Type	Status	Target Date	Date Subm
	19102400001	15951	<a href="#">Walters, Randall</a>	Hilltop Rehab	OCF23	Unmatched	2019/10/31	2019
	19102300001	852225	<a href="#">Lucarelli, Samantha</a>	Hilltop Rehab	OCF18	Unmatched	2019/11/08	2019
	19102200024	852225	<a href="#">Griff, Helen</a>	Hilltop Rehab	OCF18	Unmatched	2019/11/05	2019
	19102200022	963369	<a href="#">Carter, Elliot</a>	Hilltop Rehab	OCF18	Unmatched	2019/11/05	2019
	19102200013	14	<a href="#">June, McNally</a>	Orchard Rehabilitation Inc.	OCF18	Unmatched	2019/11/05	2019

# #3 OCFs Now Have Target Dates

- The **Document Search** screen also has a new field that allows you to prioritize your workload. Enter a range of Days Left to Respond, and specify either business days or calendar days, then press **Search** to find documents that match the criteria.

The screenshot displays the 'OCF Search' interface. At the top, there are navigation tabs: DASHBOARD, PLANS, INVOICES, CLAIMS, SEARCH, and MANAGE. Below these is a search bar with a text input for 'Search for Claim Number', a dropdown for 'All Forms', a checked 'Exact Match' checkbox, and a 'GO' button. A 'Logout' button is in the top right corner. The main content area is titled 'DOCUMENT SEARCH' and contains the 'OCF Search' form. The form has two columns of search criteria. The left column includes fields for Document Number, Claim Number, Policy Number, Date of Accident, Insurer, Branch/Claim Group, Adjuster Search by (Name/E-mail), and Adjuster. The right column includes Date Submitted (From/To), Claimant Last/First Name, Claimant Phone Number, and Date of Birth. Below these is the 'Advanced Options' section, which includes Document Type (OCF18-23), Document Status, Claimant Status, Matched to Claimant?, and Archival Status. A callout box highlights the 'Days Left to Respond' field, showing a range from 0 to 30 and a dropdown menu with 'Business Days' and 'Calendar Days' options. Another callout box highlights the 'Business Days' dropdown menu. A 'SEARCH' button is located at the bottom right of the form. A footer note states: '\* Please note that searching the archives may take several minutes. Documents are archived one year or more after the insurer's most recent response.'

# #4 Prepare for Claimant File Ownership

- After your organization migrates, adjuster profiles will be **replaced by claimant file ownership**. This means each claimant will be associated directly to a user account, known as the “file owner”, which will eliminate the need for adjuster profiles. Claimant file ownership will not be fully functional until migration.

CLAIMANTS

Claims > Claimant Search

General Notification

The following items need your attention

1. Fox, Julie has not been associated with an adjuster. Please assign an adjuster. [Assign Adjuster](#)
2. Smith, Steve has not been associated with an adjuster. Please assign an adjuster. [Assign Adjuster](#)

Search for Claimants

Enter your search criteria and click "Search". Click the checkbox next to the search criteria value for an exact match.

Claim Number:

Policy Number:

Claimant Status:  Active  Deactivated

Date of Accident:  Exact Match  Select Range

Insurer:

Branch/Claim Group:

Last Name:

First Name:

Postal Code:

Phone Number:

Date of Birth:

Document Count: (excludes archived documents)

No documents

1 document

2 to 5 documents

More than 5 documents

Period of Inactivity:

Up to 180 days

181 to 365 days

1 to 2 years

More than 2 years

Adjuster Search by:  Name  E-mail

Adjuster:

Team:

File Owner:

SEARCH

the page: LHCAL System Status

# #4 Prepare for Claimant File Ownership

- There will be some **mention of claimant file owners** throughout the application, such as the Claimant and User Search screens, and the Claimant Details screen. These fields will populate and become useful after migration.

CLAIMANTS

Claims > Claimant Search > Search Results

Claimants - Claimants Search

**Search Results (1 of 1)**

Claimant Results for "Claimant Status: Active"

<input type="checkbox"/>	▲ Claimant Name	▶ Claim #	▶ Date of Accident	▶ Date of Birth	▶ Branch/Claim Group	▶ Adjuster	▶ File Owner	▶ Status	▶ Document C
<input type="checkbox"/>	Chris, Chris	565565	2016/09/01	1998/09/03	Oshawa	Dallaire, Natalie		Active	
<input type="checkbox"/>	Fox, Emma	565565	2016/09/01	1998/09/03	Oshawa	Dallaire, Natalie		Active	
<input type="checkbox"/>	Fox, Julie	6767	2018/03/01	1999/02/04	Peterborough			Active	
<input type="checkbox"/>	Lawrence, Shai-ann	122	2018/10/02	2000/10/03	Markham Branch	Atkins, Bob		Active	
<input type="checkbox"/>	Smith, Steve	5656	2019/01/18	2000/03/02	Peterborough			Active	

Reassign: Adjuster

To reassign claimants from this page, you must refine your search. Either you have not selected a single branch/claim group, or there are no claimants that match the current search c



# What's Next?

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- **Keep checking [HCAIinfo](#)**—HCAI's dedicated eLearning resource site—for more information about Release 3.22