

# What's New? Release 3.22

## February 3, 2020

---



**Management & Administration Edition**

# Timeline for Changes

---

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

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

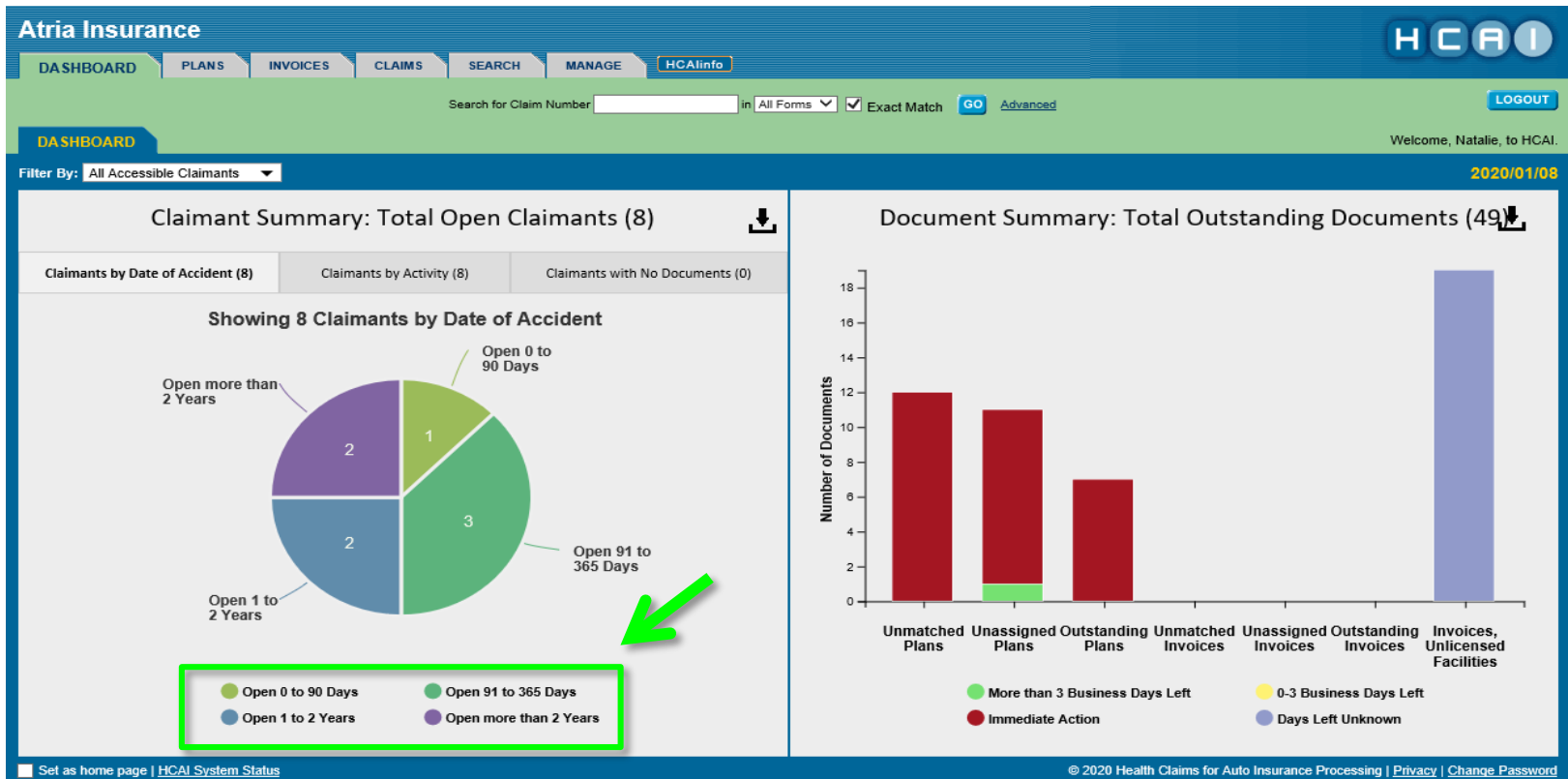
- Form Adjusters can now view their assigned claim and claimant details. Simply click on the **Claims** tab to search and browse your claim-claimant records in **read-only mode**. You can also drill down on the Claimant Summary charts on the Adjuster Dashboard.
- The Claim-Claimant Editor role is still 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 bar with a dropdown menu set to 'All Forms' and a 'GO' button. The main content area shows the 'CLAIMANTS' section with a search bar and a 'SEARCH RESULTS (1 of 1)' heading. A table of claimant records is displayed, with columns for 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 8 rows of data. At the bottom of the page, there is a 'REASSIGN' button and a note: '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.'

<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>

# #2 Updates to the Dashboard

- Insurer and branch level users who are granted the new **Manager Dashboard Viewer** role will be able to view the HCAI Dashboard.
- We've also **improved the 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. The 'SEARCH' tab is active. Below the navigation, there is a search bar for 'Claim Number' and options for 'All Forms', 'Exact Match', and 'Advanced'. A 'LOGOUT' button is in the top right corner.

The main search area is titled 'OCF Search' and includes the instruction: 'Enter your search criteria and click "Search". Click the checkbox next to the search criteria value for an exact match.' The search criteria are organized into two columns:

- Left Column:** Document Number, Claim Number, Policy Number, Date of Accident, Insurer, Branch/Claim Group, Adjuster Search by (Name/E-mail), and Adjuster.
- Right Column:** Date Submitted - From/To, Claimant Last Name, Claimant First Name, Claimant Phone Number, and Date of Birth.

Below the search criteria is the 'Advanced Options' section, which includes:

- Document Type:** OCF18, OCF21B, OCF21C, OCF22, OCF23, Form 1.
- Document Status:** Declined.
- Claimant Status:** Active, Deactivated, Not Matched.
- Matched to Claimant?:** Matched and Assigned, Matched but Not Assigned, Not Matched.
- Archival Status:** Not Archived, Archived.

The 'Days Left to Respond' field is highlighted with a green box and a callout. The callout shows the field with a range of 'From 0 to 30' and a dropdown menu with 'Business Days' selected. Below this field are three checked checkboxes: 'Overdue Documents', 'Days Left Not Tracked, Payable to Claimant', and 'Days Left Not Tracked, Response Withdrawn'.

At the bottom of the page, there is a 'SEARCH' button highlighted with a green box. A note at the bottom left 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, which will eliminate the need for adjuster profiles. Claimant file ownership will not be fully functional until migration, so you will continue to use adjuster profiles until your migration date.

The screenshot displays the 'CLAIMANTS' system interface. At the top, there is a navigation bar with 'CLAIMANTS' and a search bar. Below this, the 'Claims > Claimant Search' section is visible. A 'General Notification' box contains two items: 'Fox, Julie has not been associated with an adjuster. Please assign an adjuster.' and 'Smith, Steve has not been associated with an adjuster. Please assign an adjuster.' Below this is the 'Search for Claimants' section, which includes various search criteria fields such as Claim Number, Policy Number, Claimant Status, Date of Accident, Insurer, Branch/Claim Group, Last Name, First Name, Postal Code, Phone Number, Date of Birth, Document Count, and Period of Inactivity. A green arrow points to the 'Adjuster Search by' section, which is highlighted with a green box. This section includes radio buttons for 'Name' (selected) and 'E-mail', a dropdown menu for 'Adjuster', a dropdown menu for 'Team', and a dropdown menu for 'File Owner' which is highlighted in yellow. A 'SEARCH' button is located at the bottom right of the search form.

# #4 Prepare for Claimant File Ownership

- When adding or editing a user account, if the **Form Adjuster** role is assigned, there is an additional question: "Allow this user to have ownership of claimant files?" The default answer will be "Yes", which will allow them to be claimant file owners. You are able to select "No" if the user is in a support role and should not be a claimant file owner.
- Claimant file owners will be mentioned elsewhere, such as the claimant and user search screens, and the Claimant Details screen. These fields will populate and become useful after migration.

**Assign Roles to the User**

Management & Administrator Roles allow users to manage HCAI users, organization information and report generation. Support Roles allow users to manage claim and claimant information, assign adjusters, and provide administrative support, but not to deliver approval decisions. Adjusting Roles allow users to record approval decisions and manage forms. Multiple roles may be selected.

**Management Administrator Roles**

<input type="checkbox"/> Organization Administrator	<input type="checkbox"/> Insurer User Administrator	<input type="checkbox"/> Team Administrator
<input type="checkbox"/> Report Viewer	<input type="checkbox"/> Executive Report Viewer	<input type="checkbox"/> Manager Dashboard Viewer
<input type="checkbox"/> Form Manager		

**Support Roles**

<input type="checkbox"/> Form Support	<input type="checkbox"/> Claim/Claimant Administrator
---------------------------------------	---

**Adjusting Roles**

<input checked="" type="checkbox"/> Form Adjuster
Allow this user to have ownership of claimant files? <input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/> Claim/Claimant Editor



# #5 Restrict who can view user information in HCAI

- A new setting on each user profile asks “Allow the user to search and filter by all other users in the company?” Selecting “No” will limit the names they will see in Claimant File Owner and Team drop-down lists across HCAI. This gives you **more control** over who has permission to view user information within your company.

User Management > [User Search](#) > Add/Edit User

**Add/Edit/View User Details**

Complete all required fields (\*) to create a new HCAI user. An e-mail with the username, password and link to HCAI will be sent to the user's email address. For the detailed User Management guide, go to [www.hcaiinfo.ca](http://www.hcaiinfo.ca).

\* Organization Type: Insurer  
\* Organization: Atria Insurance  
User Status: Active

\* Last Name:   
\* First Name:   
Title:   
\* User Name:   
\* Employee ID:   
\* E-mail:   
Confirm E-mail:   
Phone:

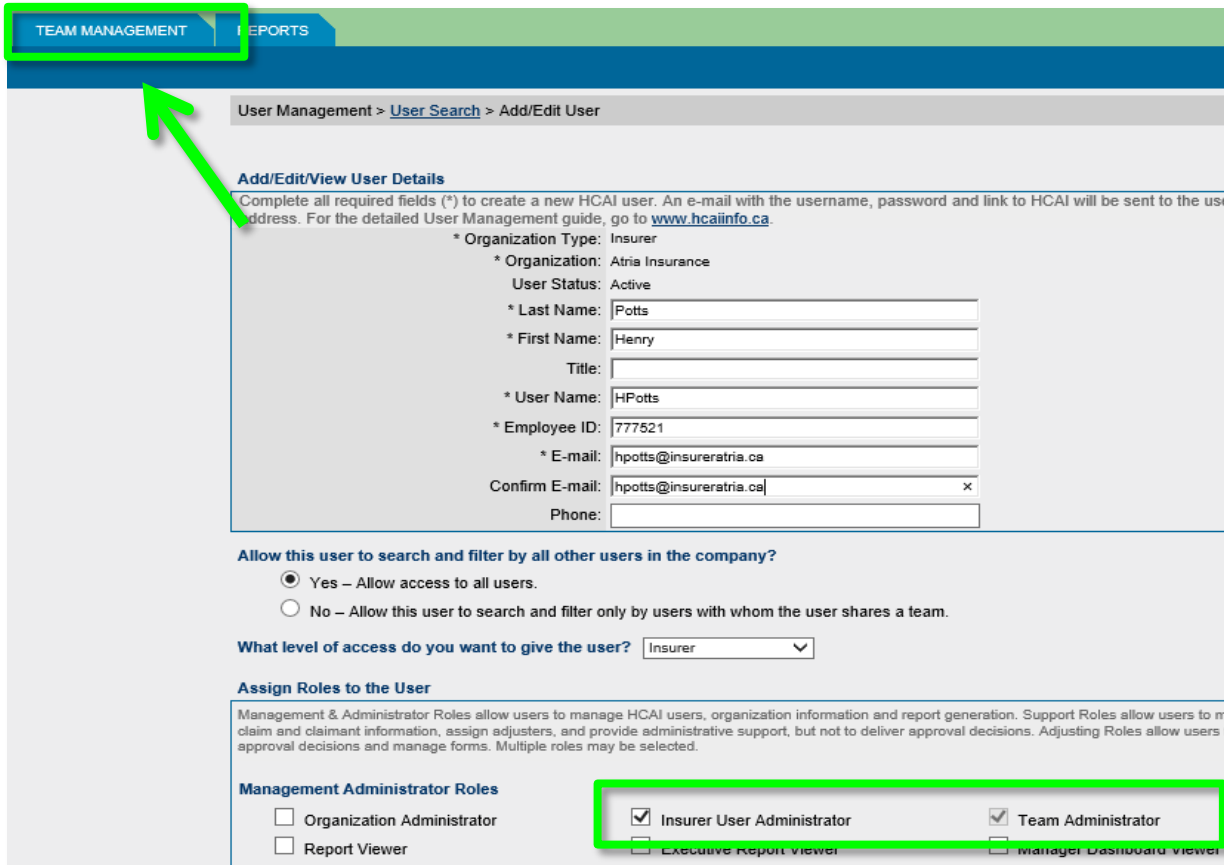
**Allow this user to search and filter by all other users in the company?**

Yes – Allow access to all users.  
 No – Allow this user to search and filter only by users with whom the user shares a team.

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

# #6 Create Teams in HCAI

- You are now able to **create Teams in HCAI**. There is a new role, Team Administrator, which allows the user to create and delete teams. Both Team Administrators and User Administrators will have access to the new **Team Management** subtab where they can create, delete and edit teams.



The screenshot displays the HCAI user management interface. At the top, a navigation bar includes a tab labeled 'TEAM MANAGEMENT' which is highlighted with a green box and a green arrow pointing to it. Below the navigation bar, the breadcrumb trail reads 'User Management > User Search > Add/Edit User'. The main content area is titled 'Add/Edit/View User Details' and contains a form for creating or editing a user. The form includes the following fields and options:

- Organization Type: Insurer
- Organization: Atria Insurance
- User Status: Active
- Last Name: Potts
- First Name: Henry
- Title: (empty)
- User Name: HPotts
- Employee ID: 777521
- E-mail: hpotts@insureratria.ca
- Confirm E-mail: hpotts@insureratria.ca
- Phone: (empty)

Below the form, there are two sections:

- Allow this user to search and filter by all other users in the company?**
  - Yes – Allow access to all users.
  - No – Allow this user to search and filter only by users with whom the user shares a team.
- What level of access do you want to give the user?** Insurer

At the bottom, the 'Assign Roles to the User' section includes a list of roles with checkboxes:

- Organization Administrator
- Report Viewer
- Insurer User Administrator
- Executive Report viewer
- Team Administrator
- Manager Dashboard viewer

The 'Insurer User Administrator' and 'Team Administrator' checkboxes are highlighted with a green box.

# #6 Create Teams in HCAI

- The full scope of team functionality, including filtering, reporting, and a Team Dashboard, will only be available after your organization migrates.

The screenshot displays the HCAI user interface. The top navigation bar includes tabs for DASHBOARD, PLANS, INVOICES, CLAIMS, SEARCH, MANAGE, and HCAInfo. Below this, a secondary navigation bar contains INSURER MANAGEMENT, USER MANAGEMENT, TEAM MANAGEMENT (highlighted with a red box), and REPORTS. A search bar is located above the TEAM MANAGEMENT tab, with the text "Search for Claim Number" and a dropdown menu set to "All Forms". A "GO" button and an "Advanced" link are also present.

The main content area is titled "Team Management > Browse Teams". It features a "CREATE NEW TEAM" button in the top right corner. Below this is a "Browse Teams" section with a filter input field labeled "Team Name:" and "FILTER" and "CLEAR FILTER" buttons. A "View: 10 items" dropdown is located to the right of the filter.

The table below lists the teams:

Team Name	Team Editor(s)	User Count	
<a href="#">Blue Team</a>	Gilbert, Paige	7	<a href="#">DELETE TEAM</a>
<a href="#">One</a>	Dallaire, Natalie	2	<a href="#">DELETE TEAM</a>
<a href="#">Team Red</a>	-	2	<a href="#">DELETE TEAM</a>
<a href="#">Team Yellow</a>	-	4	<a href="#">DELETE TEAM</a>

A second "View: 10 items" dropdown is located at the bottom right of the table.

# #7 Claim Groups are Coming

- Claim groups are a way of organizing claims that directly **replaces branches**. They provide users with **greater access** to claims while still allowing your organization to keep some claims confidential if needed. Across HCAI, you will begin to see references to claim groups wherever branches are mentioned, like the Insurer Management sub-tab, pictured below. Claim groups will become useful after migration.

## Browse Branches/Claim Groups

ADD NEW BRANCH/CLAIM GROUP

▲ Branch/Claim Group Name	► City	Status	
<a href="#">Oshawa</a>	Oshawa	Active	DEACTIVATE
<a href="#">Peterborough</a>	Peterborough	Active	DEACTIVATE
<a href="#">Toronto</a>	Oshawa	Active	DEACTIVATE

# #8 Bulk Change of User Permissions

- On the **User Search Results** screen, we've made it easy for you to update several users' level of access or deactivate several users at once. This will become useful after your organization migrates and the Adjuster level of access is no longer used.

**Users (1 of 3)** [Refine Search](#)

Search Results for "User Status: Active"  
These are the user records matching your search criteria. Click on a user name to view or edit the profile. To update multiple user records all at once, select the records you wish to update and click "Modify Level of Access" to update level of access or "Modify Status" to activate or deactivate users.

[DOWNLOAD REPORT](#)

View: 10 items ▾ 1 2 3 ... [Next >](#)

<input type="checkbox"/>	▲ <a href="#">User Name</a>	▶ <a href="#">Employee ID</a>	▶ <a href="#">Name</a>	<a href="#">Roles</a>	▶ <a href="#">Access Level</a>	▶ <a href="#">Status</a>
<input type="checkbox"/>	246426	237457	<a href="#">Gilbert, Paige</a>	Claim/Claimant Administrator, Claim/Claimant Editor, Claimant File Owner, Form Adjuster, Insurer User Administrator, Team Administrator	Insurer	Active
<input type="checkbox"/>	Alicia_INS	123456	<a href="#">Neely, Lisa</a>	Claim/Claimant Administrator, Claim/Claimant Editor, Claimant File Owner, Executive Report Viewer, Form Adjuster, Form Manager, Form Support, Insurer User Administrator, Manager Dashboard Viewer, Organization Administrator, Report Viewer, Team Administrator	Insurer	Active
<input checked="" type="checkbox"/>	Am11	23512362	<a href="#">Martin, Albert</a>	Insurer User Administrator, Organization Administrator, Team Administrator	Insurer	Active
<input type="checkbox"/>	Billy12	5867	<a href="#">Joe, Billy</a>	Claim/Claimant Administrator, Claimant File Owner, Form Adjuster, Insurer User Administrator, Team Administrator	Insurer	Active
<input type="checkbox"/>	BobINS	BobINS	<a href="#">Atkins, Bob</a>	Insurer User Administrator, Team Administrator	Insurer	Active
<input type="checkbox"/>	Bruno11	114444	<a href="#">Myers, Bruno</a>	Claim/Claimant Administrator, Claim/Claimant Editor, Claimant File Owner, Form Adjuster, Form Manager, Form Support, Insurer User Administrator, Organization Administrator, Report Viewer, Team Administrator	Insurer	Active
<input checked="" type="checkbox"/>	Eddy	33333	<a href="#">Bill, Ed</a>	Claim/Claimant Editor, Claimant File Owner, Form Adjuster	Adjuster	Active
<input type="checkbox"/>	EileenG	24737	<a href="#">Gentry, Eileen</a>	Claim/Claimant Administrator, Insurer User Administrator, Organization Administrator, Team Administrator	Insurer	Active
<input checked="" type="checkbox"/>	J579	37357	<a href="#">Welch, Jadyn</a>	Claim/Claimant Editor, Claimant File Owner, Form Adjuster	Adjuster	Active
<input type="checkbox"/>	Jbrown112	1112	<a href="#">Brown, Janice</a>	Claim/Claimant Administrator, Claimant File Owner, Form Adjuster, Form Manager, Form Support, Team Administrator	Insurer	Active

[MODIFY LEVEL OF ACCESS](#) [MODIFY STATUS](#)

View: 10 items ▾ 1 2 3 ... [Next >](#)

# #9 Bulk Claimant Transfer

- The **Claimant Search Results** screen now features a tool that will make it easier to transfer several claimants to a new adjuster or claimant file owner in bulk.

The screenshot displays the 'CLAIMANTS' section of a software interface. It shows a search results page for 'Claimant Status: Active' with one result. The table lists claimants with columns for Name, Claim #, Date of Accident, Date of Birth, Branch/Claim Group, Adjuster, and File Owner. A green box highlights the 'Reassign' tool at the bottom, which includes a dropdown menu for 'Adjuster' and 'File Owner', and a 'REASSIGN' button. A green arrow points from the text box to the 'Reassign' tool.

<input type="checkbox"/>	▲ Claimant Name	▶ Claim #	▶ Date of Accident	▶ Date of Birth	▶ Branch/Claim Group	▶ Adjuster	▶ File Owner
<input type="checkbox"/>	<a href="#">Chris, Chris</a>	565565	2016/09/01	1998/09/03	Oshawa	Dallaire, Natalie	
<input type="checkbox"/>	<a href="#">Fox, Emma</a>	565565	2016/09/01	1998/09/03	Oshawa	Don, Sady	Herbert, Shawn
<input type="checkbox"/>	<a href="#">Fox, Julie</a>	6767	2018/03/01	1999/02/04	Peterborough		Brown, Janice
<input type="checkbox"/>	<a href="#">Klein, gfdsg</a>	554564	2020/01/02	2002/01/02	Toronto		
<input type="checkbox"/>	<a href="#">Lawrence, Shai-ann</a>	122	2018/10/02	2000/10/03	Markham Branch	Atkins, Bob	
<input type="checkbox"/>	<a href="#">Lucarelli, Samantha</a>	852225	2019/10/01	1999/08/03	Markham Branch		Brown, Janice
<input type="checkbox"/>	<a href="#">Reynolds, Patrick</a>	15951	2019/05/02	1975/05/06	Markham Branch		Neilsen, Jose
<input type="checkbox"/>	<a href="#">Smith, Steve</a>	5656	2019/01/18	2000/03/02	Peterborough		

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

- Integrating insurers will not see this tool on the web, to avoid interference with their Claim-Claimant feed. However, you can contact Insurer Integration Support to request access to the tool.

# What's Next?

---

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