

What's New? Release 3.23

June 1, 2020



Insurer Edition

Timeline for Changes

- HCAI System Release 3.23 goes live on **June 1, 2020.**

Changes Visible to All Insurers

- The following changes will be visible to all insurers on June 1, whether or not your company has migrated.

#1 Document Search Enhancements

- The Document Search screen now features two new search criteria: **Date Responded** and **Adjudicating User**.

The screenshot displays the 'DOCUMENT SEARCH' interface. At the top, it says 'Welcome, Natalie, to HCAI' and '2020/05/07'. The main section 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 several sections:

- Document Information:** Document Number, Claim Number, Policy Number, and Date of Accident (all with checkboxes for exact match).
- Date Submitted:** From and To date pickers.
- Claimant Information:** Last Name, First Name, and Phone Number (all with checkboxes for exact match).
- Personal Information:** Date of Birth, Team, and Claimant File Owner.
- Claimant Status:** Active, Deactivated, Not Matched.
- Matched to Claimant?:** Matched and Correctly Assigned, Matched but Needs Reassignment, Matched but Not Assigned, Not Matched.
- Provider Information:** Last Name, First Name, Profession, and Registry Number (all with checkboxes for exact match).
- Archival Status:** Not Archived (selected) or Archived.

A callout box with a green border highlights the new search criteria:

- Date Responded:** (For Adjudicated Documents) with two date pickers and a 'to' separator.
- Adjudicating User:** (For Adjudicated Documents) with a dropdown menu.

Below the callout, the 'Days Left to Respond' section is visible, including options for 'Overdue Documents' and 'Days Left Not Tracked, Payable to Claimant'. At the bottom, there is a note: '* Please note that searching the archives may take several minutes. Documents are archived one year or more after the insurer's most recent response.' and a 'SEARCH' button.

#1 Document Search Enhancements

- When searching for adjudicated documents, the **Target Date** column will now populate with the date the response was originally due.
- When downloading Document Search results as a .CSV report, you will see a new **Adjudicating User** column, indicating the name of the user who adjudicated each document.

Bay Insurance Company

DASHBOARD DOCUMENTS CLAIMS SEARCH MANAGE HCAInfo

Search for Claim Number in All Forms Exact Match GO Advanced LOGOUT

DOCUMENT SEARCH Welcome, Natalie, to HCAI 2020/05/05

Search Results (1 of 1) DOWNLOAD REPORT REFINE SEARCH

Document Results for "Document Status: Approved; Partially Approved; Declined; Responded, Archival Status: Not Archived"

Document #	Claim #	Claimant	Facility Name	Claimant File Owner	OCF Type	Status	Target Date	Date Submitted	Proposed Amount (\$)	Approved Amount (\$)
20011400003	14	McNally, June	Orchard Rehabilitation Inc.	Dixon, Natalie	OCF18	Approved	2020/01/28	2020/01/14	\$200.00	\$200.00
19110800006	14	Blue, Sally	Royal Trust Hospital	Brown, Davis	OCF18	Approved	2019/11/22	2019/11/08	\$9,040.00	\$9,040.00
19101800002	4567901-2	Mariah, Marilyn	Royal Trust Hospital	Dixon, Natalie	OCF21B	Approved	2019/11/17	2019/10/18	\$800.00	\$800.00

Only active documents are shown. Click "Search Archives" if you would like to search for archived documents that match these search criteria. Please note that searching the archives may take several minutes.

SEARCH ARCHIVES

A	B	C	D	E	F	G	H	I	J	K
Document	Claim #	Claimant	Facility Name	Claimant File Owner	Adjudicating User	OCF Type	Status	Target Date	Date Submitted	Last Modified
2E+10	14	McNally, June	Orchard Rehabilitation Inc.	Dixon, Natalie	Dixon, Natalie	OCF18	Approved	1/28/2020	1/14/2020	1/14/2020
1.91E+10	14	Blue, Sally	Royal Trust Hospital	Brown, Davis	Dixon, Natalie	OCF18	Approved	11/22/2019	11/8/2019	11/8/2019
1.91E+10	4567901-2	Mariah, Marilyn	Royal Trust Hospital	Dixon, Natalie	Dixon, Natalie	OCF21B	Approved	11/17/2019	10/18/2019	10/18/2019

#2 Explanation of Benefits Update

- HCAI's Explanation of Benefits PDF has been updated to reflect SLASTO's current contact information. The "**In Person**" section has been removed.
- If your organization uses their own Explanation of Benefits, they should update their forms to reflect this change.

How to Submit Your Application

BY MAIL:

Automobile Accident Benefits Service
Licence Appeal Tribunal
77 Wellesley St. W.
Box 250
Toronto, ON, M7A1N3

BY FAX:

(416) 325-1060 or 1-844-618-2566

#3 Updates to Recommended Browsers

- For the safest user experience, HCAI recommends using **Internet Explorer 11** or **Safari 12**.
- Visit HCAIinfo's [Computer Requirements](#) page for more information about supported browsers and recommended settings

Changes Visible to Migrated Insurers

- The following changes will only be visible on June 1 to companies who have migrated.

#4 New Insurer's Signature Settings

- Migrated insurers now have the flexibility to choose the information displayed in the **insurer's signature section** of an OCF.
- On the Insurer Management screen, Organization Administrators may indicate their companies' signature preference by selecting one of three options:
 1. The claimant file owner's name
 2. The adjudicating user's name
 3. The adjudicating user's name "on behalf of" the claimant file owner's name

Insurer's Signature Settings

Insurers have the option to choose what name is displayed in the insurer's signature section when documents are adjudicated. Any modification to the policy here applies only to documents adjudicated after this setting is selected.

Choose the information to be displayed in the insurer's signature section of a document:

- Claimant file owner's name
The name of the file owner assigned to the claimant at the time of adjudication.
- Adjudicating user's name
The name of the user who actually registered the adjudication decision, whether or not that user is the claimant file owner.
- Adjudicating user's name "on behalf of" claimant file owner's name
The names of both the user who registered the adjudication decision and the claimant file owner. Example: "Smith, John on behalf of Jones, Jane".

#4 New Insurer's Signature Settings

- Once saved, the information will appear in the insurer's signature section of documents.
- Below is an example of how option 3 would appear on an OCF-18.

Part 13: Signature of Insurer

Adjuster's Name: Dixon, Natalie on behalf of Brown, Davis

* Is the applicant's or substitute decision maker's signature waived by the insurer? No Yes

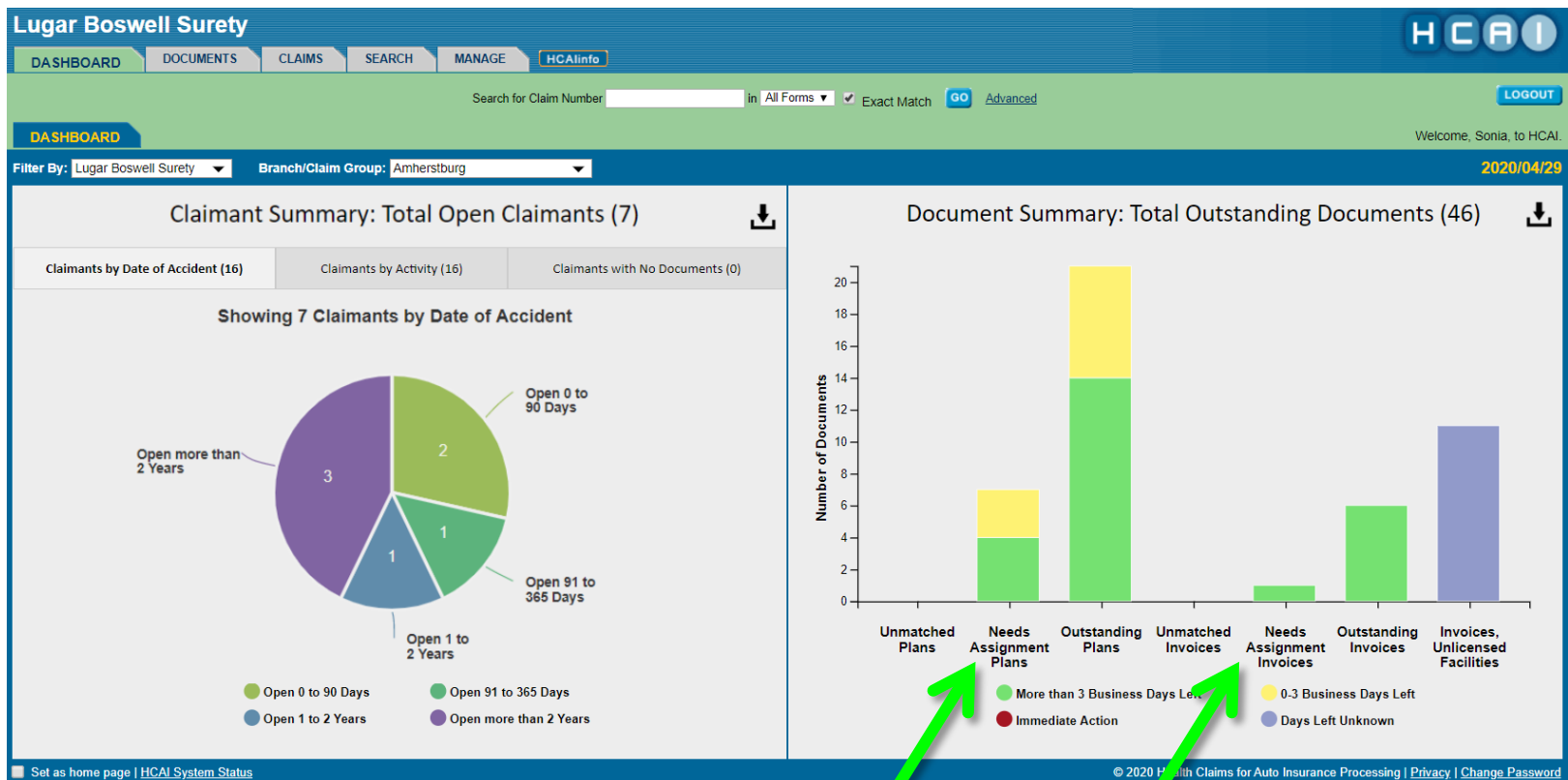
OCF18 is Approved on 2020/04/23

CANCEL **CREATE EOB** **PRINT**

SUMMARY 1 2 3 4 5 6 ◀ BACK NEXT ▶

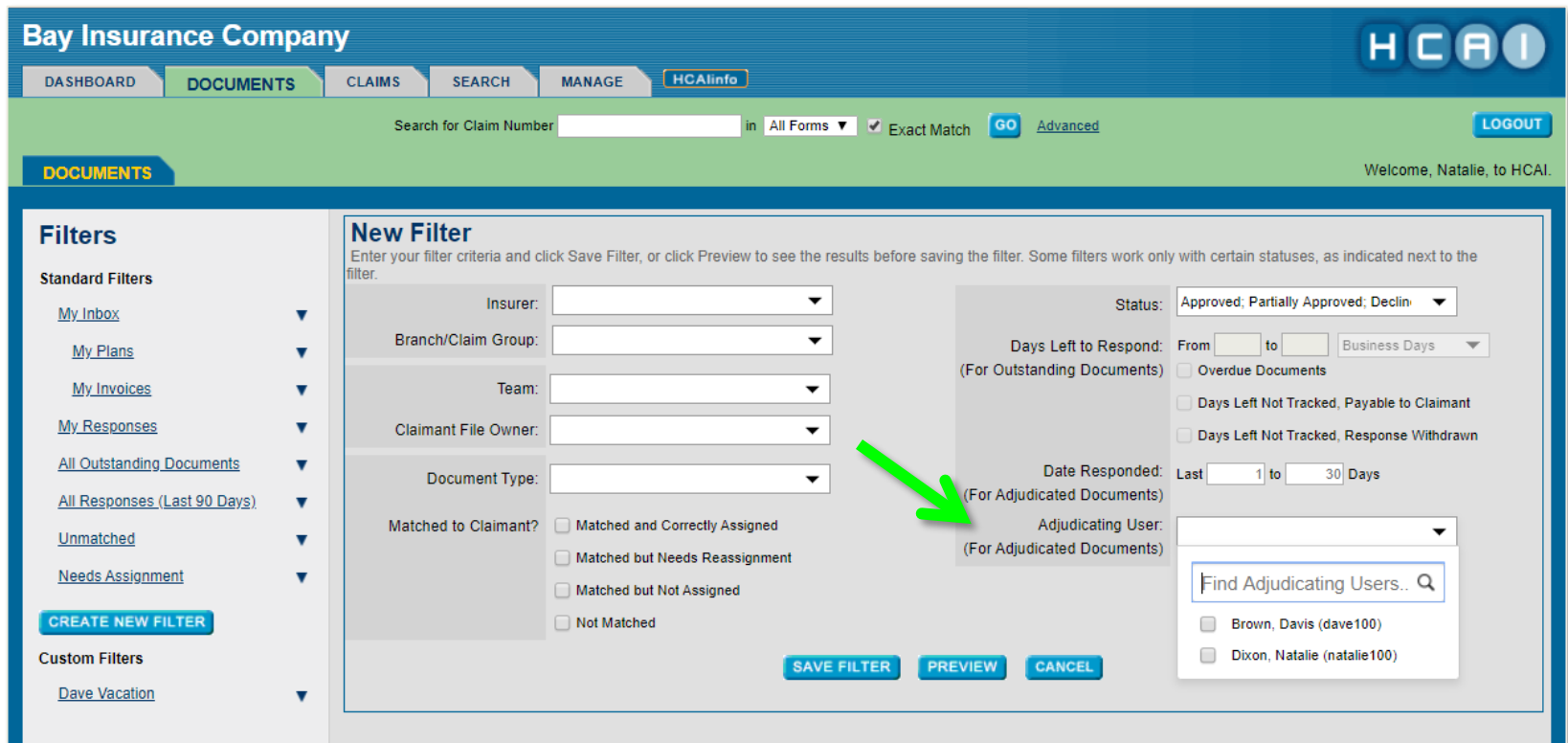
#5 Dashboard Updates

- The Dashboard's **Document Summary** now includes two new bars:
 1. Needs Assignment Plans
 2. Needs Assignment Invoices
- These highlight documents that need to be assigned to a new claimant file owner.



#6 Worklist Filter Updates

- We have added a new criterion for your custom worklist filters. You can now filter adjudicated documents according to the **Adjudicating User**.



The screenshot displays the 'New Filter' configuration interface in the HCAI system. The interface includes a sidebar with 'Filters' (Standard and Custom) and a main area for defining filter criteria. A green arrow points to the 'Adjudicating User' dropdown menu, which is open to show a search for users. The search results list 'Brown, Davis (dave100)' and 'Dixon, Natalie (natalie100)'.

Bay Insurance Company HCAI

DASHBOARD DOCUMENTS CLAIMS SEARCH MANAGE HCAIinfo

Search for Claim Number in All Forms Exact Match GO Advanced LOGOUT

DOCUMENTS Welcome, Natalie, to HCAI.

Filters

Standard Filters

- My Inbox
- My Plans
- My Invoices
- My Responses
- All Outstanding Documents
- All Responses (Last 90 Days)
- Unmatched
- Needs Assignment

CREATE NEW FILTER

Custom Filters

- Dave Vacation

New Filter

Enter your filter criteria and click Save Filter, or click Preview to see the results before saving the filter. Some filters work only with certain statuses, as indicated next to the filter.

Insurer:

Branch/Claim Group:

Team:

Claimant File Owner:

Document Type:

Matched to Claimant?

- Matched and Correctly Assigned
- Matched but Needs Reassignment
- Matched but Not Assigned
- Not Matched

Status:

Days Left to Respond: (For Outstanding Documents) From to Business Days

- Overdue Documents
- Days Left Not Tracked, Payable to Claimant
- Days Left Not Tracked, Response Withdrawn

Date Responded: (For Adjudicated Documents) Last 1 to 30 Days

Adjudicating User: (For Adjudicated Documents)

Find Adjudicating Users.. Q

- Brown, Davis (dave100)
- Dixon, Natalie (natalie100)

SAVE FILTER **PREVIEW** **CANCEL**

#6 Worklist Filter Updates

- If you attempt to use a worklist filter that is now obsolete, you will see a message indicating you can either edit the filter or delete it. For example, a filter will become obsolete if it contains a team that has been deleted.

The screenshot displays the Bay Insurance Company HCAI interface. The top navigation bar includes 'DASHBOARD', 'DOCUMENTS', 'CLAIMS', 'SEARCH', 'MANAGE', and 'HCAIinfo'. A search bar is present with a 'GO' button and an 'Advanced' link. The user is logged in as 'Natalie'.

The main content area is titled 'DOCUMENTS' and shows a filter configuration for 'Nat's Team Filter'. The filter settings are: Claimant File Owner: Any, Document Type: Any, Status: (empty), and Team: Team One (Deleted Team). A message in the center states: 'The filter that you are trying to use has become obsolete. You may edit the filter to revise it or delete this filter.'

The left sidebar lists 'Filters' under 'Standard Filters' and 'Custom Filters'. The 'Standard Filters' list includes: My Inbox, My Plans, My Invoices, My Responses, All Outstanding Documents, All Responses (Last 90 Days), Unmatched, and Needs Assignment. The 'Custom Filters' list includes: Leo Vacation and Nat's Team Filter. A 'CREATE NEW FILTER' button is also visible.

#7 Custom Filter Target Date Update

- When viewing a custom worklist filter that contains both outstanding and adjudicated documents, the Target Date column will now populate for all forms.

The screenshot shows the Bay Insurance Company HCAI portal. The main navigation bar includes DASHBOARD, DOCUMENTS, CLAIMS, SEARCH, MANAGE, and HCAIinfo. A search bar is present with the text "Search for Claim Number" and a dropdown menu set to "All Forms". A "GO" button and an "Advanced" link are also visible. The user is logged in as "Natalie" and is viewing the "DOCUMENTS" section.

The "Filters" sidebar on the left lists various filter categories: Standard Filters (My Inbox, My Plans, My Invoices, My Responses, All Outstanding Documents, All Responses (Last 90 Days), Unmatched, Needs Assignment) and Custom Filters (Leo Vacation, Nat's Team Filter). The "Nat's Team Filter" is selected.

The main content area displays "Nat's Team Filter (Showing 1 - 5 of 12 documents)". Below this, there are search filters for Claimant File Owner (Any), Document Type (OCF18; OCF23; Form), Status (Submitted; Review Re), and Adjudicated in Last (1 to 90 Days). A table of documents is shown with the following columns: Document #, Claim #, Claimant, Claimant File Owner, Document Type, Status, Target Date, and Date Submitted. A green box highlights the Status and Target Date columns for the first five rows.

Document #	Claim #	Claimant	Claimant File Owner	Document Type	Status	Target Date	Date Submitted
20050500004	14	McNally	Dixon, Natalie	OCF18	Submitted	2020/05/21	2020/05/05
20050500003	14	McNally	Dixon, Natalie	OCF18	Submitted	2020/05/20	2020/05/05
20050500002	14	McNally	Dixon, Natalie	OCF18	Declined	2020/05/20	2020/05/05
20050400005	14	McNally	Dixon, Natalie	OCF18	Approved	2020/05/20	2020/05/04
19110800006	14	Blue	Brown, Davis	OCF18	Approved	2019/11/22	2019/11/08

What's Next?

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