

What's New? Release 3.25

June 28, 2021



Insurer Edition

Timeline for Changes

- HCAI System Release 3.25 goes live on **June 28, 2021.**

#1 More Flexible Filters

- We're enhancing the Documents tab Worklist filters in two ways.
- Users can now save up to **20 custom worklist filters**. This increased flexibility will allow you to view the exact type of document that is relevant to your needs.

Atria Insurance HCAI

DASHBOARD DOCUMENTS CLAIMS SEARCH MANAGE HCAInfo

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](#)

Custom Filters

- [Paige Vacation](#)
- [Team A](#)
- [Team B](#)
- [Team C](#)

CREATE NEW FILTER

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: From to

(For Outstanding Documents)

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- Days Left Not Tracked, Response Withdrawn

Date Responded: Last to Days

(For Adjudicated Documents)

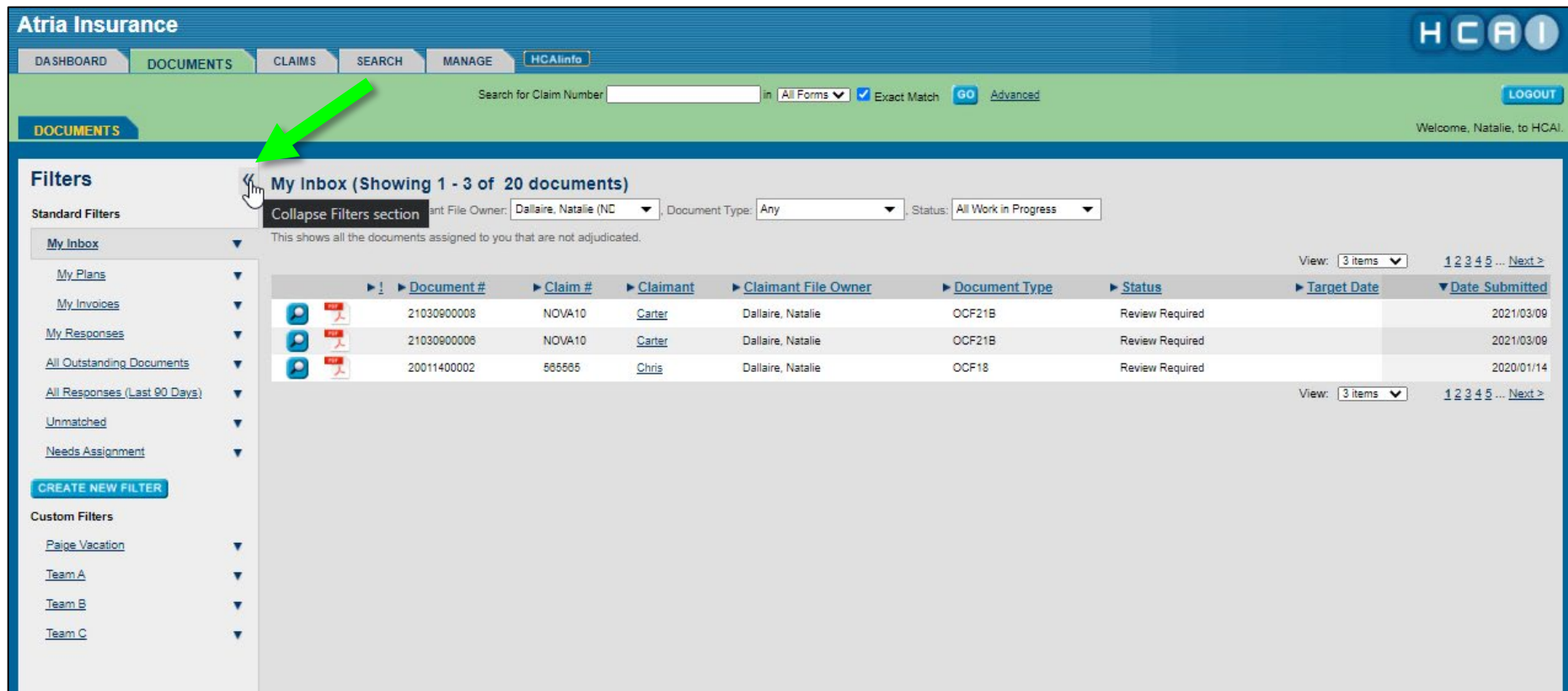
Adjudicating User:

(For Adjudicated Documents)

SAVE FILTER PREVIEW CANCEL

#1 More Flexible Filters

- Users will also have the option to **hide the filter pane** from your worklist.
- Once you've selected your preferred filter, click the arrow to hide the pane and have the worklist fill your screen.



The screenshot displays the Atria Insurance web application interface. At the top, there is a navigation bar with tabs for DASHBOARD, DOCUMENTS, CLAIMS, SEARCH, MANAGE, and HCAInfo. A search bar is present with the text 'Search for Claim Number' and options for 'All Forms', 'Exact Match', and 'Advanced'. A 'LOGOUT' button is in the top right corner.

The main content area is titled 'DOCUMENTS' and shows a 'Filters' section on the left. The 'My Inbox' filter is selected, showing 'Showing 1 - 3 of 20 documents'. A green arrow points to a collapse icon (two arrows pointing left) in the filter header. Below the filter header, there are dropdown menus for 'Claimant File Owner' (Dallaire, Natalie (NC)), 'Document Type' (Any), and 'Status' (All Work in Progress). A note states: 'This shows all the documents assigned to you that are not adjudicated.'

The main area contains a table of documents with the following columns: Document #, Claim #, Claimant, Claimant File Owner, Document Type, Status, Target Date, and Date Submitted. The table lists three documents:

Document #	Claim #	Claimant	Claimant File Owner	Document Type	Status	Target Date	Date Submitted
21030900008	NOVA10	Carter	Dallaire, Natalie	OCF21B	Review Required		2021/03/09
21030900008	NOVA10	Carter	Dallaire, Natalie	OCF21B	Review Required		2021/03/09
20011400002	565665	Chris	Dallaire, Natalie	OCF18	Review Required		2020/01/14

At the bottom of the filter pane, there are sections for 'Standard Filters' and 'Custom Filters' (Paige Vacation, Team A, Team B, Team C). A 'CREATE NEW FILTER' button is also visible.

#1 More Flexible Filters

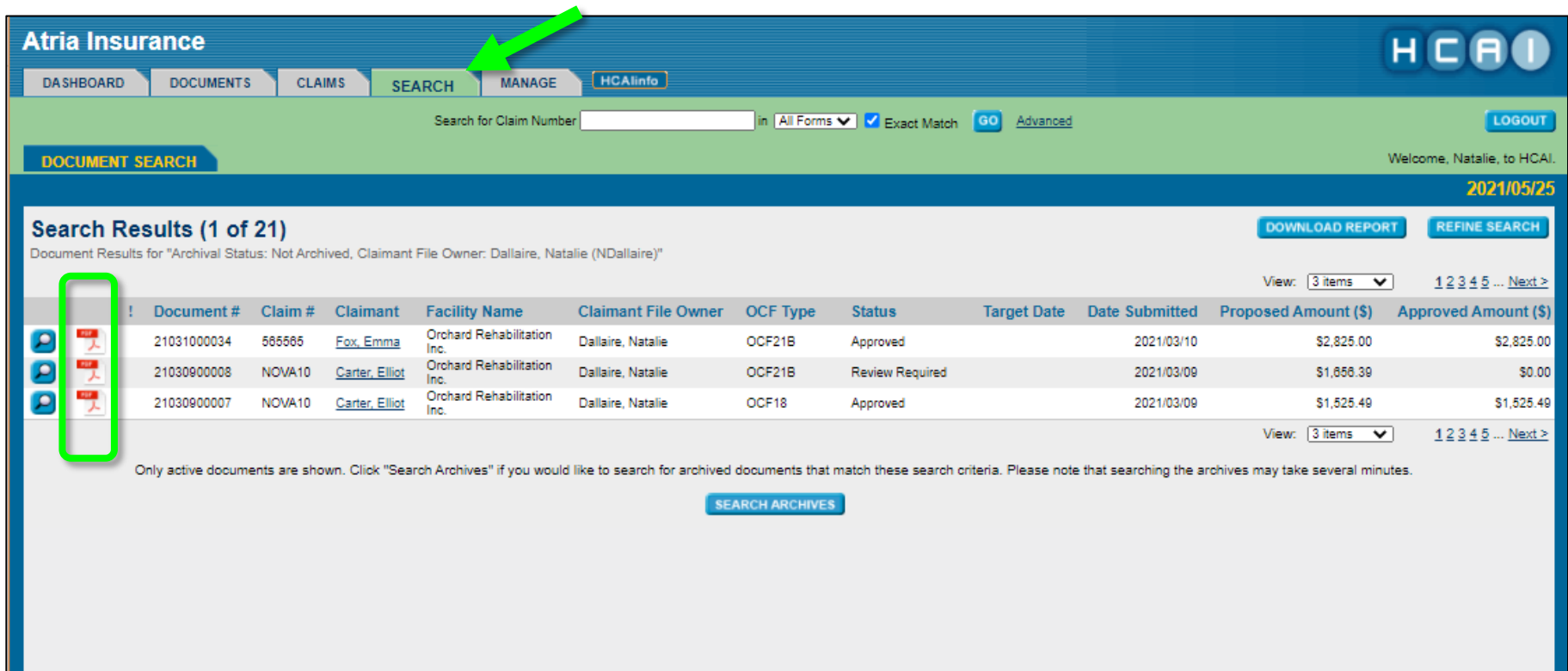
- If you need to switch filters, click the arrow to **view** the filter pane again.

The screenshot displays the Atria Insurance web application interface. At the top, there is a navigation bar with tabs for DASHBOARD, DOCUMENTS, CLAIMS, SEARCH, and MANAGE, along with an HCAInfo button. A search bar is present with a dropdown menu set to 'All Forms', a checked 'Exact Match' option, and a 'GO' button. A 'LOGOUT' button is in the top right corner. Below the navigation bar, the main content area is titled 'My Inbox (Showing 1 - 3 of 20 documents)'. It includes a filter section with dropdown menus for 'Claimant File Owner' (Dallaire, Natalie (NC)), 'Document Type' (Any), and 'Status' (All Work in Progress). A note states: 'This shows all the documents assigned to you that are not adjudicated.' A table lists three documents with columns for Document #, Claim #, Claimant, Claimant File Owner, Document Type, Status, Target Date, and Date Submitted. A 'Filter' icon in the left sidebar is highlighted with a green arrow.

Document #	Claim #	Claimant	Claimant File Owner	Document Type	Status	Target Date	Date Submitted
21030900008	NOVA10	Carter	Dallaire, Natalie	OCF21B	Review Required		2021/03/09
21030900008	NOVA10	Carter	Dallaire, Natalie	OCF21B	Review Required		2021/03/09
20011400002	585585	Chris	Dallaire, Natalie	OCF18	Review Required		2020/01/14

#2 PDF Icon Added to Documents Search

- We're adding the popular **PDF icon** to your Document Search Results.
- This means when locating documents using the Search tab, you can quickly access the PDF version with a single click.



The screenshot displays the Atria Insurance web application interface. At the top, the navigation menu includes 'DASHBOARD', 'DOCUMENTS', 'CLAIMS', 'SEARCH', and 'MANAGE'. A green arrow points to the 'SEARCH' tab. Below the navigation, there is a search bar with the text 'Search for Claim Number' and a search button labeled 'GO'. The main content area is titled 'DOCUMENT SEARCH' and shows 'Search Results (1 of 21)'. A table lists search results with columns for Document #, Claim #, Claimant, Facility Name, Claimant File Owner, OCF Type, Status, Target Date, Date Submitted, Proposed Amount (\$), and Approved Amount (\$). A green box highlights a PDF icon in the left margin of the table. Below the table, there is a 'SEARCH ARCHIVES' button.

Document #	Claim #	Claimant	Facility Name	Claimant File Owner	OCF Type	Status	Target Date	Date Submitted	Proposed Amount (\$)	Approved Amount (\$)
21031000034	565565	Fox, Emma	Orchard Rehabilitation Inc.	Dallaire, Natalie	OCF21B	Approved		2021/03/10	\$2,825.00	\$2,825.00
21030900008	NOVA10	Carter, Elliot	Orchard Rehabilitation Inc.	Dallaire, Natalie	OCF21B	Review Required		2021/03/09	\$1,656.39	\$0.00
21030900007	NOVA10	Carter, Elliot	Orchard Rehabilitation Inc.	Dallaire, Natalie	OCF18	Approved		2021/03/09	\$1,525.49	\$1,525.49

#3 Updated PDF Versions

- The **submitted and adjudicated versions** of documents are available for download as PDF. This aligns the web application with the PDF enhancements being introduced for integration.
- Of note, the claimant file owner or adjuster's name will not appear on the submitted version of the PDF.

#4 Enhanced Claimant File Owner Dropdown

- The **Claimant File Owner dropdown** is now organized in a more intuitive way.
- You will first see active users with the Claimant File Owner role, followed by active users without the role. Deactivated users are found at the end of the list.

The screenshot displays the Atria Insurance web application interface. The top navigation bar includes 'DASHBOARD', 'DOCUMENTS', 'CLAIMS', 'SEARCH', 'MANAGE', and 'HCAInfo'. A search bar is present with a 'GO' button and an 'Advanced' link. The main content area is titled 'DOCUMENTS' and shows a 'Current Filter (Showing 1 - 3 of 49 documents)' section. A dropdown menu is open for the 'Claimant File Owner' field, listing various users with checkboxes. A green arrow points to the dropdown menu. The main table displays document details with columns for Document Type, Status, Target Date, and Date Submitted.

Document #	Document Type	Status	Target Date	Date Submitted
21030900008	OCF21B	Review Required		2021/03/09
21030900008	OCF21B	Review Required		2021/03/09
20011400002	OCF18	Review Required		2020/01/14

#5 New Recommended Browsers

- For the best user experience, access HCAI on an up-to-date web browser.
- We recommend using:
 - **Chromium-based Microsoft Edge** on Windows 10
 - **Safari 13** on MacOS Catalina (Version 10.15)

What's Next?

- **Keep checking [HCAIinfo](#)**—HCAI's dedicated eLearning resource site—for more information about Release 3.25