



# Insurer User Manual

## Chapter 5: Common Functionality

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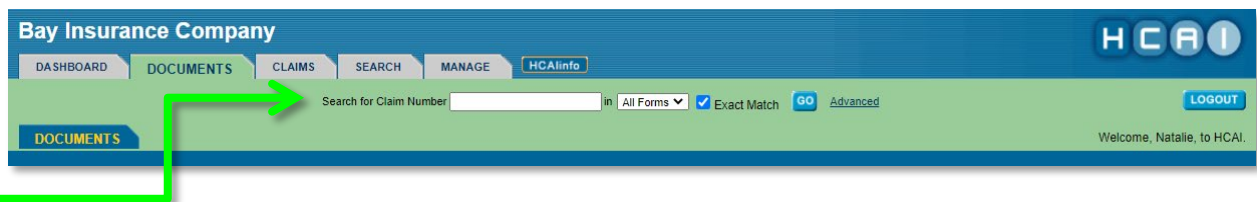
# Chapter 5: Common Functionality

This chapter describes functionality that is common for all parts of the HCAI application.

## Search

At any time on the insurer home page, you can search for documents related to a specific claim using the 'Search for Claim Number' at the top of the page.. You can also click on the 'Advanced' link next to the 'Search for Claim Number' field to bring up the Search > Document Search tab.

Quickly launch a search by entering a claim number into the search tab that appears at the top of the application



Click on the Search tab to begin a search for one or more OCFs. The Search tab provides access to the Document Search sub tab, where you can look for a specific plan (OCF-18, OCF-23, or Form 1) or invoice (OCF-21).

If the 'Exact Match' box is checked, HCAI will search for an OCF or OCFs using only the value(s) entered in the field(s) selected. 'Exact Match' is, by default, already selected—simply click the checkbox to remove it from your search query.

The more information you enter into your search query (using the search parameters provided), the faster HCAI will execute the search.

Checking the 'Exact Match' box next to the search field will only pull information as it is entered into the search field

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

|                        |                      |                                     |
|------------------------|----------------------|-------------------------------------|
| Document Number:       | <input type="text"/> | <input checked="" type="checkbox"/> |
| Claim Number:          | <input type="text"/> | <input checked="" type="checkbox"/> |
| Policy Number:         | <input type="text"/> | <input checked="" type="checkbox"/> |
| Date of Accident:      | <input type="text"/> | <input type="checkbox"/>            |
| Insurer:               | <input type="text"/> | <input type="checkbox"/>            |
| Branch/Claim Group:    | <input type="text"/> | <input type="checkbox"/>            |
| Date Submitted - From: | <input type="text"/> | <input type="checkbox"/>            |
| Date Submitted - To:   | <input type="text"/> | <input type="checkbox"/>            |
| Claimant Last Name:    | <input type="text"/> | <input checked="" type="checkbox"/> |
| Claimant First Name:   | <input type="text"/> | <input checked="" type="checkbox"/> |
| Claimant Phone Number: | <input type="text"/> | <input checked="" type="checkbox"/> |
| Date of Birth:         | <input type="text"/> | <input type="checkbox"/>            |
| Team:                  | <input type="text"/> | <input type="checkbox"/>            |
| Claimant File Owner:   | <input type="text"/> | <input type="checkbox"/>            |

[Advanced Options >>](#)

Click the 'Advanced Options' link for additional search criteria

## Advanced Search

Clicking the 'Advanced Options' link at the bottom right-hand corner of the OCF Search screen brings up additional search parameters.

These additional search parameters include:

- Document Type (e.g. OCF-18, OCF-21B, OCF-21C, OCF-22, OCF-23, Form 1)
- Document Status (e.g. Submitted, Approved, Declined, etc.)
- Claimant Status (e.g. Active, Deactivated, Not Matched)
- Days Left to Respond (From/To, Overdue, Days Left Not Tracked Payable to Claimant, Days Left Not Tracked Response Withdrawn)
- Matched to Claimant (Matched and Correctly Assigned, Matched but Needs Reassignment, Matched but Not Assigned, Not Matched)
- Date Responded (From/To)
- Adjudicating User
- Archival Status (Archived, Not Archived)
- Provider Information (Provider name, Profession, Registry Number)
- Facility name

The 'Advanced Options' link gives you even more search criteria to further refine your search results

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

|                     |                      |                                     |                        |                      |                                     |
|---------------------|----------------------|-------------------------------------|------------------------|----------------------|-------------------------------------|
| Document Number:    | <input type="text"/> | <input checked="" type="checkbox"/> | Date Submitted - From: | <input type="text"/> | <input type="button" value="v"/>    |
| Claim Number:       | <input type="text"/> | <input checked="" type="checkbox"/> | Date Submitted - To:   | <input type="text"/> | <input type="button" value="v"/>    |
| Policy Number:      | <input type="text"/> | <input checked="" type="checkbox"/> | Claimant Last Name:    | <input type="text"/> | <input checked="" type="checkbox"/> |
| Date of Accident:   | <input type="text"/> | <input type="button" value="v"/>    | Claimant First Name:   | <input type="text"/> | <input checked="" type="checkbox"/> |
| Insurer:            | <input type="text"/> | <input type="button" value="v"/>    | Claimant Phone Number: | <input type="text"/> | <input checked="" type="checkbox"/> |
| Branch/Claim Group: | <input type="text"/> | <input type="button" value="v"/>    | Date of Birth:         | <input type="text"/> | <input type="button" value="v"/>    |
|                     |                      |                                     | Team:                  | <input type="text"/> | <input type="button" value="v"/>    |
|                     |                      |                                     | Claimant File Owner:   | <input type="text"/> | <input type="button" value="v"/>    |

**Advanced Options**


|  |  |                                  |   |  |                                     |
|--|--|----------------------------------|---|--|-------------------------------------|
| Document Type:                                       | <input type="checkbox"/> OCF18<br><input type="checkbox"/> OCF21B<br><input type="checkbox"/> OCF21C<br><input type="checkbox"/> OCF22<br><input type="checkbox"/> OCF23<br><input type="checkbox"/> Form 1  | Claimant Status:                 | <input type="checkbox"/> Active<br><input type="checkbox"/> Deactivated<br><input type="checkbox"/> Not Matched   |  |                                     |
| Document Status:                                     | <input type="text" value="Any"/>   | Matched to Claimant?:            | <input type="checkbox"/> Matched and Correctly Assigned<br><input type="checkbox"/> Matched but Needs Reassignment<br><input type="checkbox"/> Matched but Not Assigned<br><input type="checkbox"/> Not Matched |  |                                     |
| Days Left to Respond:<br>(For Outstanding Documents) | From <input type="text" value="0"/> to <input type="text" value="30"/> Business Days: <input type="button" value="v"/><br><input checked="" type="checkbox"/> Overdue Documents<br><input checked="" type="checkbox"/> Days Left Not Tracked, Payable to Claimant<br><input checked="" type="checkbox"/> Days Left Not Tracked, Response Withdrawn | Facility:                        | <input type="text"/>  |  |                                     |
| Date Responded:<br>(For Adjudicated Documents)       | <input type="text"/>   | <input type="button" value="v"/> | Provider Last Name:   | <input type="text"/>   | <input checked="" type="checkbox"/> |
| Adjudicating User:<br>(For Adjudicated Documents)    | <input type="text"/>   | <input type="button" value="v"/> | Provider First Name:  | <input type="text"/>   | <input checked="" type="checkbox"/> |
|  |  |                                  | Provider Profession:  | <input type="text"/>   | <input type="button" value="v"/>    |
|  |  |                                  | Provider Registry Number<br>(College/Registry ID):  | <input type="text"/>   | <input checked="" type="checkbox"/> |
|  |  |                                  | Archival Status:  | <input checked="" type="radio"/> Not Archived <input type="radio"/> Archived * |                                     |


\* Please note that searching the archives may take several minutes. Documents are archived one year or more after the insurer's most recent response.

[<< Advanced Options](#)

## Search Results

The search results screen appears following the execution of a search. HCAI populates the search results in chronological order by date of submission with the most recent results at the top of the list. Up to 100 search results can be displayed at a time.

To access an OCF that appears in the search results, simply click on the  on the left hand side of the screen.

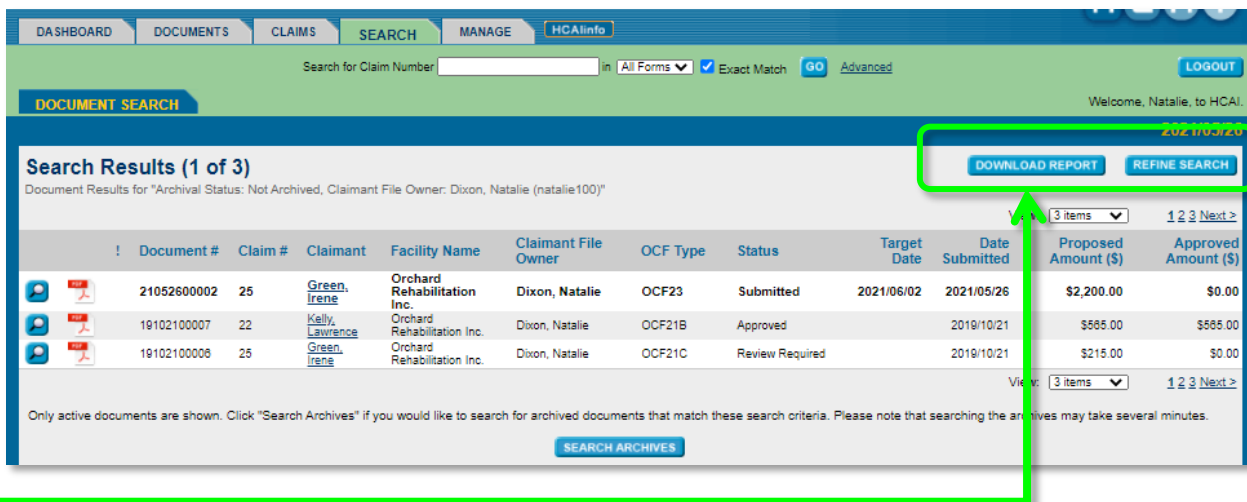
To access the PDF version of an OCF, click on the  icon next to the Document Number.

A **DOWNLOAD REPORT** option is provided to allow the user to download the search results displayed on the screen as a CSV file.

A **REFINE SEARCH** option will direct the user back to the OCF Form Search screen where a new search can be executed. When you click this button, the previous search criteria will be retained.

Click the **Download Report** button to download the displayed results in CSV format

Click the **Refine Search** button to edit your search criteria




The screenshot shows the 'DOCUMENT SEARCH' interface. At the top, there are navigation tabs: DASHBOARD, DOCUMENTS, CLAIMS, SEARCH (active), and MANAGE. Below the tabs is a search bar with the text 'Search for Claim Number' and a search button labeled 'GO'. To the right of the search bar are options for 'All Forms', 'Exact Match', and 'Advanced'. A 'LOGOUT' button is in the top right corner. The main content area is titled 'DOCUMENT SEARCH' and shows 'Search Results (1 of 3)'. Below this, there is a table with columns: Document #, Claim #, Claimant, Facility Name, Claimant File Owner, OCF Type, Status, Target Date, Date Submitted, Proposed Amount (\$), and Approved Amount (\$). The table contains three rows of data. In the top right corner of the search results area, there are two buttons: 'DOWNLOAD REPORT' and 'REFINE SEARCH', both highlighted with a green box. A green arrow points from the 'DOWNLOAD REPORT' button to the text on the left. At the bottom of the search results area, there is a 'SEARCH ARCHIVES' button and a note: '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.'

| Document #  | Claim # | Claimant        | Facility Name               | Claimant File Owner | OCF Type | Status          | Target Date | Date Submitted | Proposed Amount (\$) | Approved Amount (\$) |
|-------------|---------|-----------------|-----------------------------|---------------------|----------|-----------------|-------------|----------------|----------------------|----------------------|
| 21052600002 | 25      | Green, Irene    | Orchard Rehabilitation Inc. | Dixon, Natalie      | OCF23    | Submitted       | 2021/06/02  | 2021/05/26     | \$2,200.00           | \$0.00               |
| 19102100007 | 22      | Kelly, Lawrence | Orchard Rehabilitation Inc. | Dixon, Natalie      | OCF21B   | Approved        |             | 2019/10/21     | \$565.00             | \$565.00             |
| 19102100006 | 25      | Green, Irene    | Orchard Rehabilitation Inc. | Dixon, Natalie      | OCF21C   | Review Required |             | 2019/10/21     | \$215.00             | \$0.00               |

## Navigating in an OCF plan or invoice

Use the navigation (numbered tab) buttons at the top or bottom of the screen to move from one page of an OCF to another. The tab of the page you are currently viewing turns green. Use the 'Next' or 'Back' navigation text buttons at the top or bottom of each page to move forward and backward through the pages of the form.

## Description of buttons

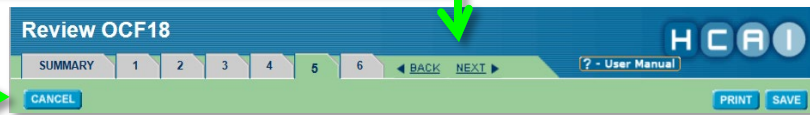
While reviewing a plan, you may see question mark buttons (  ). These buttons provide more details on the subject of a given section. Hold the mouse over the button or click it to see pop-up menus with either additional comments or definitions.

## Action buttons

The following three buttons are common to all screens within an OCF plan or invoice. They appear at the top and bottom of every screen:

Use the tabs or press the 'Back/Next' buttons to move through the tabs

Three action buttons appear in this row



- **Cancel.** When selected, this button brings up a dialog box to confirm cancellation. Click 'Ok' to exit the form. If you have not saved the information entered in the form thus far, this information will be lost when you exit.
- **Save.** This button saves any changes you have made so far. When selected, it brings up a dialog box to confirm saving. Click 'Ok' to save and you will be returned to the page where you are currently located.
- **Print.** This button brings up a PDF version of the form.

## Decision Buttons

The following decision buttons are available at the bottom of the last screen.

I have reviewed this form and based upon the information provided, I:

**APPROVE**   **PARTIALLY APPROVE**   **DO NOT APPROVE**

- **Approve.** This button validates that each good or service has been approved and marks the OCF as having been approved.
- **Partially Approve.** This button validates that some of the goods or services have been denied or not fully approved, while others may have been approved. It also validates the reason codes specified in the case(s) of partial approval.
- **Do Not Approve.** This button validates that all of the goods and services have been denied and the respective reason codes have been indicated.
- **Submit.** The OCF-23 does not have an 'Approve' button. Instead, the user presses 'Submit' to respond or 'Do Not Approve' to decline an OCF-23.

## Other Buttons

Other buttons are available within certain OCFs, including:

- **Need to discuss.** This button initiates a discussion between the Adjuster and the associated Health Care Facility. It requires the Adjuster to draft a message to the Facility in the Message to Provider field.
- **Create or View EOB.** This button generates and opens the EOB window. This information is read-only and is available only after the Adjuster has responded. You can add or edit your comments here.

## Specifying Reason Codes

Reason codes are specified in the final step of any OCF. To search for a reason code, use the ellipsis buttons (⋮) found in the Adjuster Response column of the Proposed Goods and Services section, which can also be accessed from the Apply Multiple Reason Codes section.

To search for a reason code:

1. Click the ellipsis button (⋮)
2. The 'Reason Code Look Up' screen opens with all reason codes listed

Use the available filters to shorten the list of codes shown below

When you initially arrive at this screen, all reason codes are shown

| Code    | Description                                  | ADD |
|---------|--|-----|
| 1.00.10 | No record of authorization                   | ADD |
| 1.01.00 | Good or service requires prior authorization | ADD |
| 1.02.00 | Authorized quantity exceeded                 | ADD |
| 1.02.05 | Authorized amount exceeded                   | ADD |
| 1.03.05 | Authorized time period exceeded              | ADD |
| 1.04.15 | Transferred to another provider              | ADD |
| 1.05.00 | Date of service precedes date of loss        | ADD |
| 1.05.05 | Time limit for filing has expired            | ADD |

3. Refine your search, using the available filters to shorten the list
4. Find the required reason code and click the **ADD** button
5. The reason code and its description appear under the ellipsis button (⋮) you selected at the beginning of your search.

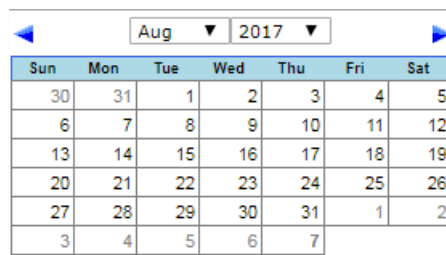


## Specifying Dates

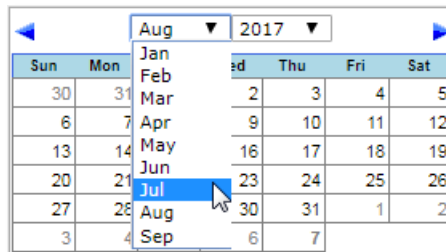
To specify a date, you can enter it manually using the date convention YYYY/MM/DD or click the calendar icon (📅) located to the right of the date fields throughout the form. If you enter a number from 1 to 30, it will be populated as the day, and the current month and year will be added when you click outside of the entry box.

To use the calendar icon, follow these steps:

1. Click the icon to bring up the calendar overlay. It displays the dates as of the current month and year



2. To select a different month, use the left and right scroll arrows at the top of the calendar to scroll back and forth through the months.



3. To select a different year, click on the month/year display at the top of the calendar. In the drop-down menu, select a required year.

You also have the option to use 'hotkeys'. Click in a date field and press the following keys:

- "T" enters today's date
- "C" brings up the calendar overlay
- "Up Arrow" changes the date forward one day
- "Down Arrow" changes the date backward one day
- "Page Up" changes the date forward one month
- "Page Down" changes the date backward one month

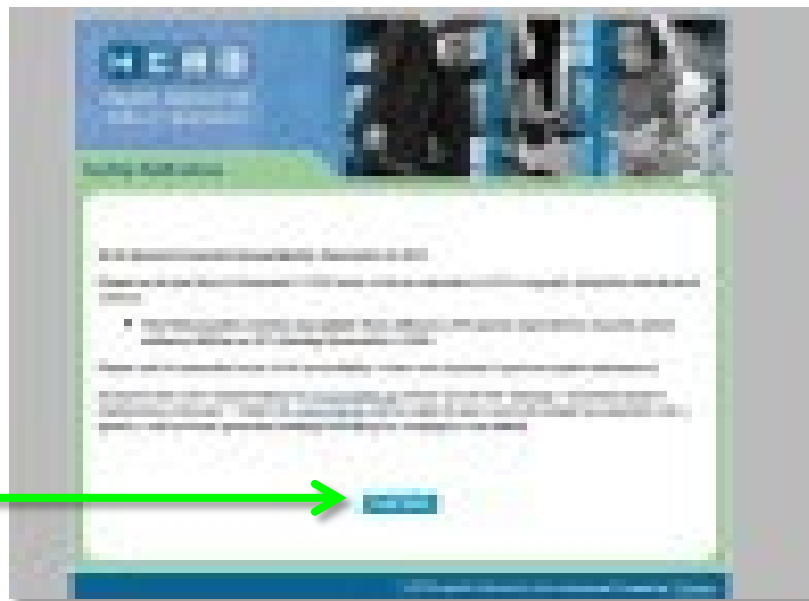
- Click on the desired option, and your selection is inserted into the date field of your screen

### Viewing notifications and error messages

There are different kinds of notifications and error messages in HCAI:

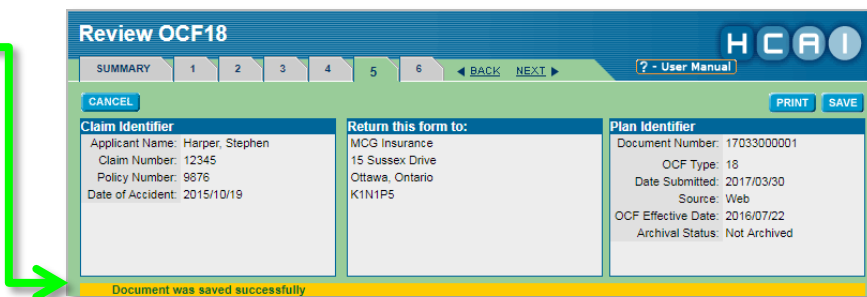
**Notification Window:** These may appear immediately after signing in to HCAI. Users will only encounter a notification window when a message is available for review. When a notification appears after signing in, users must carefully review the message contents. Once the content is reviewed, click the **CONTINUE** button.

Once you have reviewed the message, press the 'Continue' button to enter the application



**Save:** When you successfully save a document, a confirmation notification appears in green font against a yellow background.

A message confirms that the save was successful



**Decision confirmation:** When you successfully submit an approval decision on a plan or invoice, a confirmation screen appears, containing the claim identifier, return this form to and plan identifier sections of the plan or invoice.

A message confirms that your decision has been received

**Review OCF18** HCAI

| Claim Identifier  | Return this form to:  | Plan Identifier  |
|---|---|--|
| Applicant Name: Harper, Stephen<br>Claim Number: 12345<br>Policy Number: 9876<br>Date of Accident: 2015/10/19 | MCG Insurance<br>15 Sussex Drive<br>Ottawa, Ontario<br>K1N1P5 | Document Number: 17033000001<br>OCF Type: 18<br>Date Submitted: 2017/03/30<br>Source: Web<br>OCF Effective Date: 2016/07/22<br>Archival Status: Not Archived |

You have approved document number 17033000001

[PRINT](#) [CLOSE WINDOW](#) [CREATE EOB](#)

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**Error messages:** These messages appear in red font with a yellow background at the top of the screen. They refer you to the section where the error occurred. The header of this section provides a more detailed error description, and a red exclamation mark appears next to the field that contains the error.

A red exclamation mark indicates the line that contains the error

**Part 12: Proposed Goods or Services Requiring Insurer Approval**

Line 2 has the following errors:

- Cost must be provided.
- Count must be provided.

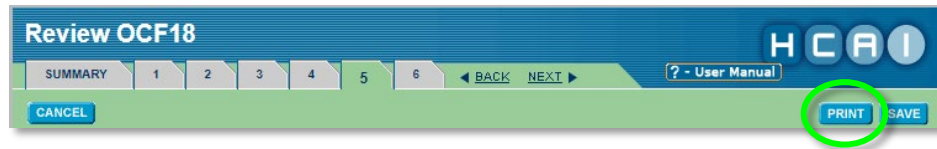
| GS Ref#                  | Code      | Attr. | Provider Reference | Quantity/Measure | Estimated/Day |             | Projected  |        | Proposed Tax                        | Adjuster Response |
|--------------------------|-----------|-------|--------------------|------------------|---------------|-------------|------------|--------|-------------------------------------|-------------------|
|                          |           |       |                    |                  | Cost          | Total Count | Total Cost | Count  |                                     |                   |
| <input type="checkbox"/> | 1.EL.05   |       | Bailey, Laura      | 1 PR             | 25.00         | 7           | 175.00     | 175.00 | <input checked="" type="checkbox"/> | ...               |
| <input type="checkbox"/> | 2.1.VA.04 |       | Bailey, Laura      | 1 PR             | 25.00         | 20          | 500.00     | 0.00   | <input checked="" type="checkbox"/> | ...               |

[APPLY REASON CODES](#) [REMOVE REASON CODES](#)

Use these buttons with the checkboxes on the left.

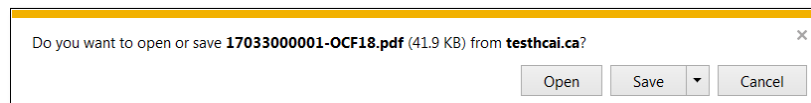
Explanation of adjuster response

## Printing a document



To print a document, from within the document:

1. Click **PRINT**. If you are using Internet Explorer, a prompt window appears, asking you if you want to open or save the PDF file.



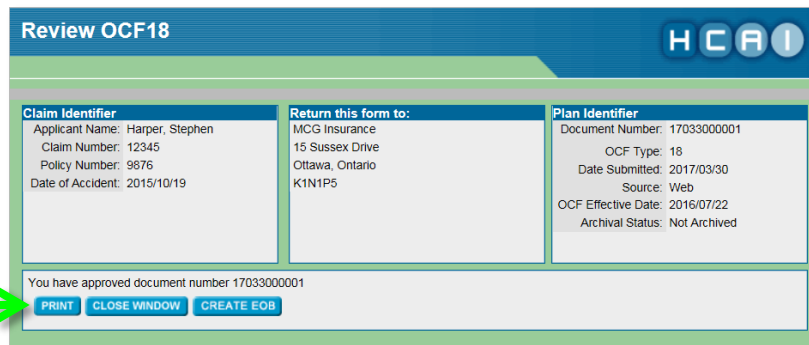
2. Open or save it as you would any PDF.

**⚠ Note: PDFs are not saved in HCAI and selecting 'Save' will save a copy of the document in the location you specify on your computer**

To print a version of the form that displays the monetary amounts proposed, the user should:

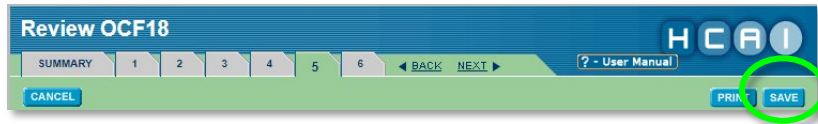
1. Adjudicate the form as usual
2. Once the decision is received, a confirmation window will appear
3. Press the **PRINT** button
4. Open or save it as you would any PDF

In the decision confirmation screen, press the 'Print' button to obtain a PDF version of the form with the decision included



## Saving a reviewed OCF plan

You may need to save the plan you are working on if you want to interrupt your work and resume it later. You do not have to save the plan before submitting your decision. The **APPROVE**, **DO NOT APPROVE** or **PARTIALLY APPROVE** buttons validate the plan and save it upon submission.



## To save a plan:

1. Click the **SAVE** button at the top or bottom of each form.
2. Click 'OK' to get the confirmation message to appear.

## Viewing HCAI's Privacy Policy

The link to the Privacy Policy is located in the bottom right-hand corner of each screen. Click on this link to review the policy.

