



Health Claims for Auto Insurance

# INSURER USER MANUAL

## *Chapter 5*

### *Common Functionality*

November 2015

### OVERVIEW

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

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## Search

At any time on the Insurer home page, you can 1.) search for a specific Claim using a Claim Number or 2.) click on the <Advanced> text-link next to the "Search for Claim Number" field to bring up the *Search > Document Search* tab.

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

HCAI provides a "30 day" default date range for the OCF search functionality.

Included is the option to execute an "Exact Match" search for the specific value(s) entered in that field. If the "Exact Match" box is checked, HCAI will search for an OCF or OCFs using the only the value(s) entered in the field(s) selected. "Exact Match" is, by default, already selected—simply click the checkbox to remove the "Exact Match" option 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.

## Advanced Search

Clicking the <Advanced Options> text-link at the bottom right-hand corner of the *OCF Form Search* screen brings up additional search parameters.

These search parameters are: Document Type, Claimant Status, Adjudication Status and Archival Status—that is, the option to search for a specific OCF or group of OCFs in HCAI's archive database. Whichever additional search parameters you select will further narrow your search query.

**KOH Global Re**

PLANS INVOICES **SEARCH** MANAGE ? - User Manual

Search for Claim Number  in All Forms ☒ Exact Match **GO** [Advanced](#) **LOGOUT**

**DOCUMENT SEARCH** Welcome, Emily, to HCAI. **2015/09/24**

**OCF Form Search**  
Enter your search criteria and click "Search"

Date Submitted - From: 2013/04/11 To: 2013/05/10

Document Number:  ☒ Exact Match  
 Claim Number:  ☒ Exact Match  
 Policy Number:  ☒ Exact Match  
 Date of Accident:   
 Date of Birth:   
 Claimant Last Name:  ☒ Exact Match  
 Claimant First Name:  ☒ Exact Match  
 Claimant Phone Number:  ☒ Exact Match  
 Adjuster:   
 Provider Profession:   
 Provider Registry Number (College/Registry ID):  ☐ Exact Match

**Advanced Options**

Document Type: ☐ OCF18 ☐ OCF21B ☐ OCF21C ☐ OCF22 ☐ OCF23

Claimant Status: ☐ Active ☐ Deactivated ☐ Unmatched

Adjudication Status: ☐ Submitted ☐ Need to Discuss ☐ Review Required ☐ Approved ☐ Partially Approved ☐ Declined ☐ Pending

Archival Status: ☒ Not Archived ☐ Archived \*

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

<< [Advanced Options](#) **SEARCH**

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## Search Results

Following the execution of a search, the search results screen appears. HCAI populates the search results according to the order of date the document was submitted—i.e., OCFs submitted earlier appear at the top of the search results list.

To access an OCF that appears in the search results, simply click on the underlined text containing the Claimant last name, first name and document type at the beginning of each entry in the search results list. A “Refine Search” text-link is provided to direct the user back to the OCF Form Search screen where a new search can be executed.

At the bottom of the Search Results screen is [SEARCH ARCHIVES](#) button. Click this button to execute the same OCF search in HCAI’s archive database.

**KOH Global Re** HCAI

PLANS INVOICES CLAIMS **SEARCH** MANAGE [? - User Manual](#)

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

**DOCUMENT SEARCH** Welcome, Rafa, to HCAI.

**2013/05/27**

---

**Search Results (1 of 13)** [Refine Search](#)

Document Results for "Date Submitted From: 2010/04/28, Date Submitted To: 2013/05/27, Archival Status: Not Archived"

View: 3 items [1](#) [2](#) [3](#) [4](#) [5](#) ... [Next >](#)

[Diaz, Carmen | OCF23](#)

Document Number: 11020800024  
Claim Number: 0203

Submitted by **Kian Clinic** on 2011/02/08 Proposed Amount: **\$1,730.00**

Last Modified Date: 2012/02/29 Approved Amount: **\$0.00**

Status: In Discussion, Response Sent

Policy Holder: Diaz , Carmen  
Policy Number: CD\_01

Date of Accident: 2009/06/18

[Diaz, Carmen | OCF21B](#)

Document Number: 11030200018  
Claim Number: 0203

Submitted by **Kian Clinic** on 2011/03/02 Proposed Amount: **\$280.00**

Last Modified Date: 2012/02/29 Approved Amount: **\$0.00**

Status: Review Required

Policy Holder: Diaz , Carmen  
Policy Number: CD\_01

Date of Accident: 2009/06/18

[Diaz, Carmen | OCF23](#)

Document Number: 11030300080  
Claim Number: 0203

Submitted by **Kian Clinic** on 2011/03/03 Proposed Amount: **\$1,730.00**

Last Modified Date: 2012/02/29 Approved Amount: **\$1,700.00**

Status: Declined

Policy Holder: Diaz , Carmen  
Policy Number: CD\_01

Date of Accident: 2009/06/18

View: 3 items [1](#) [2](#) [3](#) [4](#) [5](#) ... [Next >](#)

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](#)

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## 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.

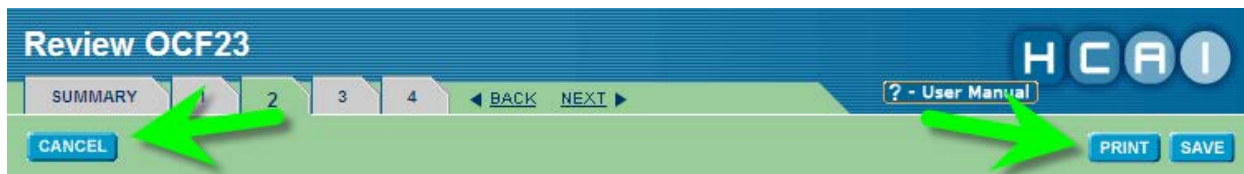


## Description of Buttons

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 the bottom of every screen:



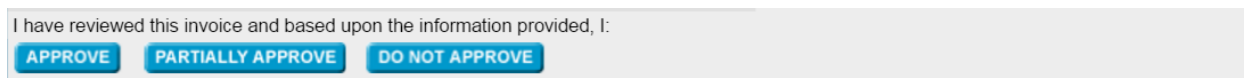
**Cancel.** When selected, this button brings up a dialog box to confirm cancellation. Click <OK> to exit the form. If you have not saved the information entered in the form thus far, this information will be lost when you exit.

**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.



**Approve.** This button validates that each good or service has been approved and marks the OCF as having been approved. It moves the OCF to the Adjuster Response work list under the Plans tab.

**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. It moves the OCF to the Adjuster Response work list under the Plans/Invoices tab.

**Do Not Approve.** This button validates that all of the goods and services have been denied and respective reason codes have been indicated. It moves the OCF into the Adjuster Response work list under the Plans/Invoices tab of the Insurer home page.

### 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.

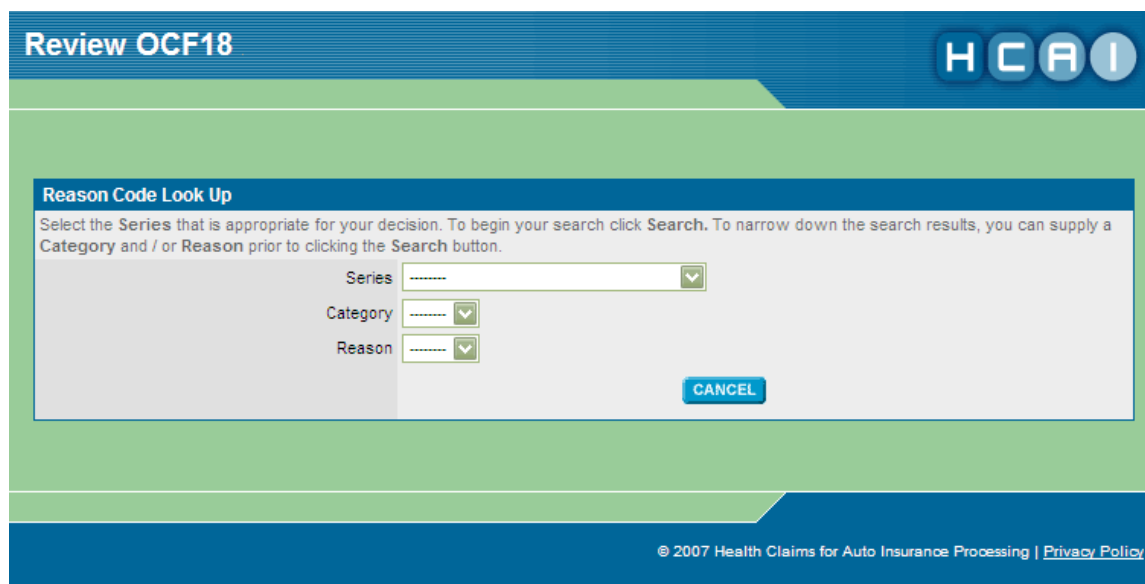
**Create or View EOB.** This button generates and opens the EOB window. This information is read-only and is available only after the Adjuster has responded. You can add or edit your comments here.

## 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.

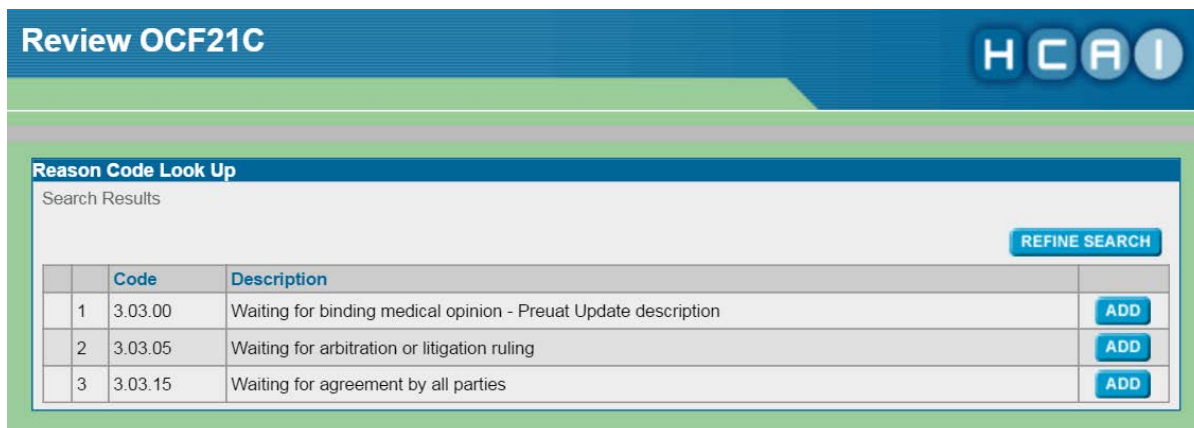
**To search for a reason code:**

Click the ellipsis button (  ). The *Reason Code Look Up* screen opens.



To refine your search, select a required series from the respective drop-down list. To view all the codes within the series, leave the category and reason unselected. Otherwise, select the category and reason from the respective lists and click  .

The results page of the *Reason Code Look Up* screen opens:



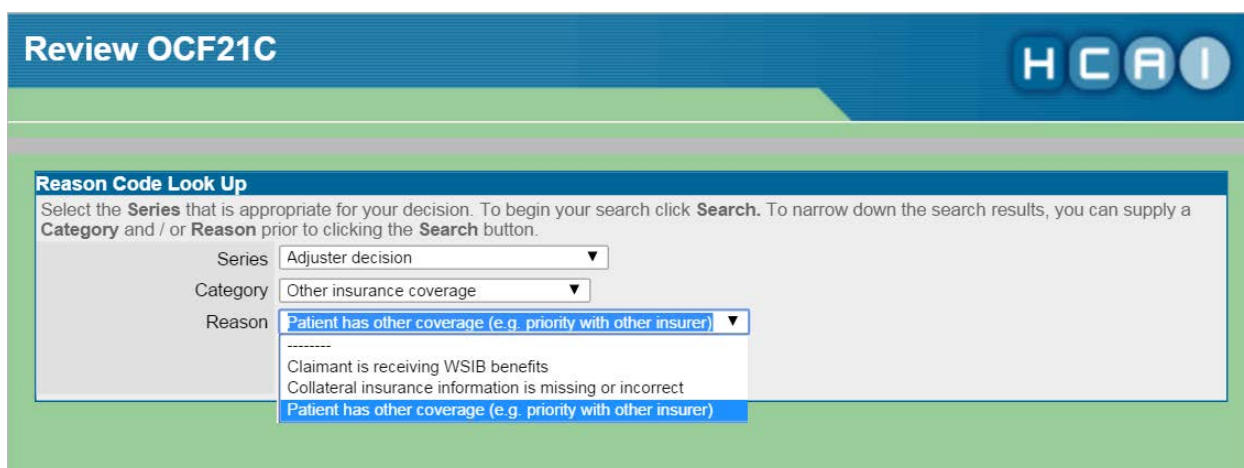
|                          | Code    | Description                                                     |                     |
|--------------------------|---------|-----------------------------------------------------------------|---------------------|
| <input type="checkbox"/> | 3.03.00 | Waiting for binding medical opinion - Preuat Update description | <a href="#">ADD</a> |
| <input type="checkbox"/> | 3.03.05 | Waiting for arbitration or litigation ruling                    | <a href="#">ADD</a> |
| <input type="checkbox"/> | 3.03.15 | Waiting for agreement by all parties                            | <a href="#">ADD</a> |

- Find the required reason code and click the [ADD](#) button.
- The [ADD](#) button takes you back to the final step of the respective OCF.

The reason code and its description appear under the ellipsis button ( [...](#) ) you selected at the beginning of your search.

OR,

- Click [REFINE SEARCH](#) to return to *the Reason Code Look Up* screen and reselect the search criteria.



Select the **Series** that is appropriate for your decision. To begin your search click **Search**. To narrow down the search results, you can supply a **Category** and / or **Reason** prior to clicking the **Search** button.

Series:

Category:

Reason:

-----

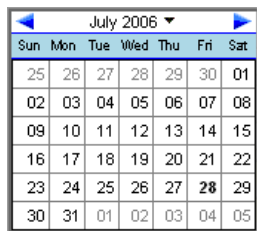
Claimant is receiving WSIB benefits  
 Collateral insurance information is missing or incorrect  
 Patient has other coverage (e.g. priority with other insurer)

## Specifying Dates

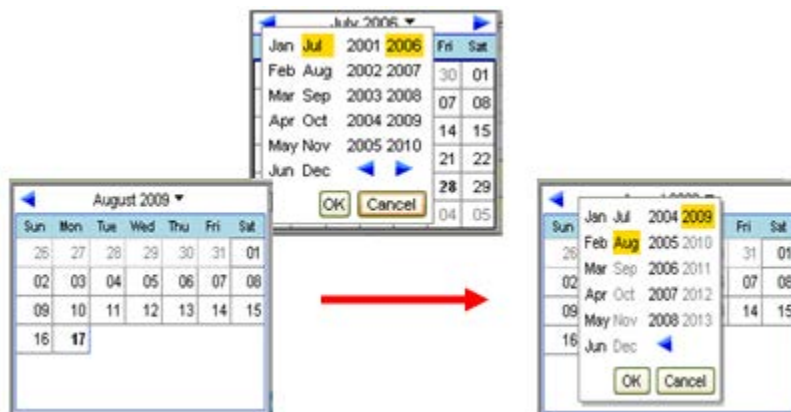
To specify a date, you can enter it manually using the date convention YYYY/MM/DD, or click the calendar icon (📅) located to the right of the date fields throughout the form. If you enter a number from 1 to 30, it will be populated as the day, and the current month and year will be added when you click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

### To use the calendar icon, follow these steps:

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



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.



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. To scroll back to an earlier year, use the left scroll arrow; to scroll forward to a later year, use the right scroll arrow. These arrows are located in the bottom of the menu. You can also use this menu to select months.

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:

A Notification Window may appear immediately after signing into 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. If prompted, users can check off the acknowledgement box located beneath the message once the content is reviewed, then click the **CONTINUE** button. If the user acknowledges the notification and presses **CONTINUE**, the message will not appear again, so it is important the notification contents be reviewed carefully.

**HCAI**  
Health Claims for Auto Insurance

### Insurer Notifications

This message is a reminder about the extension to HCAI's regularly scheduled maintenance outage:

- The HCAI system will be unavailable from 2:00 a.m. (ET) Sunday June 21, 2015 and is expected to resume active status at 6:00 p.m. (ET) Sunday June 21, 2015

The extended hours of this unavailability window are required to perform system maintenance. During this time, HCAI System Status at [www.hcaiinfo.ca](http://www.hcaiinfo.ca) will indicate "red" with the message "Scheduled system maintenance underway." Visitors to [www.hcai.ca](http://www.hcai.ca) will be unable to sign-in and will instead be presented with a generic, web-browser generated message indicating the webpage is unavailable."

☐ I am aware of the upcoming extension to HCAI's regularly scheduled system maintenance window.

**CONTINUE**

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

The screenshot shows the 'Review OCF18' interface. At the top, there's a blue header with the HCAI logo and a navigation bar with tabs labeled 1 through 6, with '5' being the active tab. Below the tabs are 'BACK' and 'NEXT' buttons. A 'User Manual' link is also present. The main content area is divided into three columns: 'Claim Identifier', 'Return this form to:', and 'Plan Identifier'. The 'Claim Identifier' column contains: Applicant Name: Zidane, Zinedine; Claim Number: 189\_abv\_099; Policy Number: 8765; Date of Accident: 2012/06/14. The 'Return this form to:' column contains: KOH Global Re NEW; 2 Speyside Way; Acton, Ontario; L2P 6p2. The 'Plan Identifier' column contains: Document Number: 13011700008; OCF Type: 18; Date Submitted: 2013/01/17; Source: Web; OCF Effective Date: 2012/11/01; Archival Status: Not Archived. At the bottom, a yellow banner with green text reads 'Document was saved successfully'. A green arrow points from the 'Return this form to:' section to the confirmation message.

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.

The screenshot shows the 'Review OCF18' interface, similar to the previous one. The 'Claim Identifier', 'Return this form to:', and 'Plan Identifier' sections contain the same information. At the bottom, a white box with a green border contains the message 'You have approved document number 13011700008'. Below this message are two buttons: 'CLOSE WINDOW' and 'CREATE OCF9'. A green arrow points from the 'Return this form to:' section to the confirmation message. The footer of the page reads '© 2013 Health Claims for Auto Insurance Processing | Privacy Policy'.

Error messages appear in red font with an orange 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.

In any plan or invoice, a numbered step with a red exclamation mark (1) means that the corresponding line contains an error.

**Line 2 has the following errors:**

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

| Estimate/Day |                                 |      |                     |                  |      | Projected                                                       |                                                            |              |                                                                                                                                              | Adjuster Response                                                                   |
|--------------|---------------------------------|------|---------------------|------------------|------|-----------------------------------------------------------------|------------------------------------------------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| GS Ref#      | Code                            | Attr | Provider Ref.       | Quantity/Measure | Cost | Total Count                                                     | Total Cost                                                 | Proposed Tax |                                                                                                                                              |                                                                                     |
| 1            | 2.GE.02<br>"Assessment (exam... |      | <u>Good, Dawn</u>   | 2.00             | HR   | 125.89                                                          | 2                                                          | 251.78       | <input checked="" type="checkbox"/> PST <input checked="" type="checkbox"/> GST<br><input type="checkbox"/> PST <input type="checkbox"/> GST |  |
|              |                                 |      |                     |                  |      | <div style="border: 1px solid #ccc; padding: 2px;">450.00</div> | <div style="border: 1px solid #ccc; padding: 2px;">0</div> | 0.00         |                                                                                                                                              |                                                                                     |
| 2            | 1.CN.12<br>"Therapy NEC, ret... |      | <u>Miller, Sara</u> | 3.00             | HR   | 234.00                                                          | 3                                                          | 702.00       | <input checked="" type="checkbox"/> PST <input checked="" type="checkbox"/> GST<br><input type="checkbox"/> PST <input type="checkbox"/> GST |  |
|              |                                 |      |                     |                  |      | <div style="border: 1px solid #ccc; padding: 2px;"></div>       | <div style="border: 1px solid #ccc; padding: 2px;"></div>  | 0.00         |                                                                                                                                              |                                                                                     |

## Printing a Document

You can print the forms no matter which work list they are in: Work in Progress, Adjuster Response, or Pending. The **CANCEL** button is available at the top and bottom of each step as well as on the Summary page of the form.

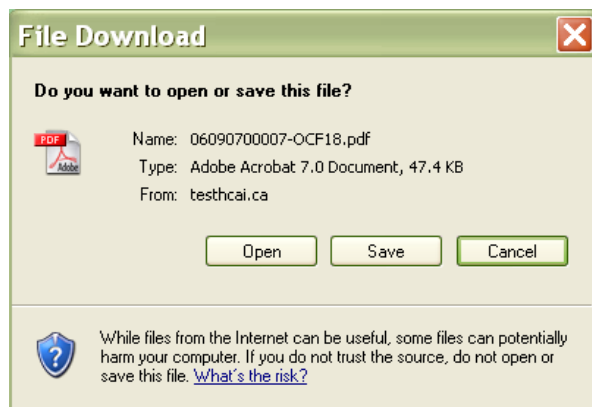
**Review OCF18** 

SUMMARY
1
2
3
4
5
6
NEXT ▶
? - User Manual

CANCEL
CREATE OCF9
PRINT

### To print a document:

Click **PRINT**. A pop-up/prompt window appears, asking you if you want to open or save the PDF file.



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 an OCF for which a decision has been made:

HCAI was built to mirror the paper version of the FSCO forms. As a result, there is one column for totalling on all OCFs. Once a decision is made by an Adjuster—for example, “Do Not Approve” or “Partially Approve”—the system updates the OCF with the amount either approved or not approved.

When an Adjuster wants to print the form to send to a medical assessment (or for his or her own files) displaying the monetary amounts proposed, the Adjuster should:

1. Open the OCF and navigate to the Summary tab.
2. Scroll to the section which displays the Activity Log.
3. Click the final version of the form (for OCFs submitted after September 1, 2010) or click on the version of the form previous to the final adjudication decision (for OCFs submitted before September 1, 2010) to open the OCF.
4. Click **PRINT**.

Review OCF18
HCAI

SUMMARY 1 2 3 4 5 6 NEXT ▶
? - User Manual

CANCEL
CREATE OCF9
PRINT

**Claim Identifier**  
 Applicant Name: Zidane, Zinedine  
 Claim Number: 189\_abv\_099  
 Policy Number: 8785  
 Date of Accident: 2012/06/14

**Return this form to:**  
 KQH Global Re NEW  
 2 Speyside Way  
 Acton, Ontario  
 L2P 6P2

**Plan Identifier**  
 Document Number: 13011700008  
 OCF Type: 18  
 Date Submitted: 2013/01/17  
 Source: Web  
 OCF Effective Date: 2012/11/01  
 Archival Status: Not Archived

**Plan Details**  
 Document Number: 13011700008 WITHDRAW RESPONSE  
 Owner:  
 Status: Approved

**Message Log**  
 Here is a list of messaging associated with this document.  
 There are no messages.

**Activity Log**  
 Activity Log for Document #: 13011700008
 

| Date & Time      | Description                                                   | Version          | Actor              |
|------------------|---------------------------------------------------------------|------------------|--------------------|
| 2013/02/12 07:47 | Bentez, Rafa submitted decision for a plan.                   | Version 3        | Bentez, Rafa       |
| 2013/02/12 07:45 | Bentez, Rafa saved adjuster's work in progress                |                  | Bentez, Rafa       |
| 2013/01/17 15:30 | HCAI Application matched claimant and applicant on a document | <u>Version 2</u> | HCAI, Application  |
| 2013/01/17 15:30 | Robertsonski, Kian submitted a plan                           | <u>Version 1</u> | Robertsonski, Kian |

**Associated Documents Results**  
**Associated Documents (1 of 1)**  
 Associated documents for this claimant.
 

| Document #                  | Type  | Facility                      | Status          | Date Sent  | Proposed Amount(\$) | Approved Amount(\$) |
|-----------------------------|-------|-------------------------------|-----------------|------------|---------------------|---------------------|
| <a href="#">12091200014</a> | OCF18 | <a href="#">Health 4 Life</a> | Submitted       | 2012/09/12 | \$18,902.00         | \$0.00              |
| <a href="#">12091900002</a> | OCF18 | <a href="#">Health 4 Life</a> | Pending         | 2012/09/19 | \$18,902.00         | \$0.00              |
| <a href="#">12092700002</a> | OCF18 | <a href="#">Health 4 Life</a> | Submitted       | 2012/09/27 | \$18,902.00         | \$0.00              |
| <a href="#">12100100005</a> | OCF18 | <a href="#">Health 4 Life</a> | Approved        | 2012/10/01 | \$18,902.00         | \$18,902.00         |
| <a href="#">12100800001</a> | OCF18 | <a href="#">Health 4 Life</a> | Approved        | 2012/10/08 | \$18,902.00         | \$18,902.00         |
| <a href="#">12111200005</a> | OCF18 | <a href="#">Health 4 Life</a> | Review Required | 2012/11/12 | \$18,902.00         | \$0.00              |
| <a href="#">12111900006</a> | OCF18 | <a href="#">Health 4 Life</a> | Approved        | 2012/11/19 | \$18,902.00         | \$18,902.00         |

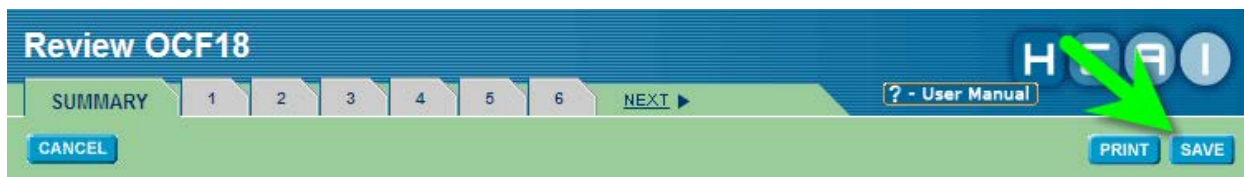
CANCEL
CREATE OCF9
PRINT

SUMMARY 1 2 3 4 5 6 NEXT ▶

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## 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**, **PENDING** or **PARTIALLY APPROVE** buttons validate the plan and save it upon submission.



### To save a plan:

Click the **SAVE** button at the top or bottom of each screen in the OCF-18, OCF-21B, OCF-21C, or OCF-23. Click <OK> to get the confirmation message to appear.

This returns you to the step where you initially saved your information. The confirmation appears in green font with a yellow background.

## 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.

**Plymouth Argyle Financial**

PLANS INVOICES CLAIMS SEARCH MANAGE ? - User Manual

Search for Claim Number  in  All Forms ☒ Exact Match  Advanced

WORK IN PROGRESS ADJUSTER RESPONSE PENDING Welcome, Stanley, to HCAI.

Filter by:  Plymouth Argyle Financial  2011/03/22

**Work In Progress (1 of 2)**  
The following items have not been adjudicated.

View:  10 items  1 2 Next >

|  | Document #  | Claim # | Claimant                  | OCF Type | Status    | Days Left | Date Submitted |
|--|-------------|---------|---------------------------|----------|-----------|-----------|----------------|
|  | 11031700013 | 70043   | <a href="#">Staunton</a>  | OCF18    | Submitted | 7         | 2011/03/17     |
|  | 11031700023 | 102     | <a href="#">Grobelaar</a> | OCF18    | Submitted | 7         | 2011/03/17     |
|  | 11031700032 | 99459   | <a href="#">Hysen</a>     | OCF18    | Submitted | 7         | 2011/03/17     |
|  | 11031700042 | 12009   | <a href="#">Rosenthal</a> | OCF18    | Submitted | 7         | 2011/03/17     |
|  | 11031700052 | 5       | <a href="#">Hansen</a>    | OCF18    | Unmatched | 7         | 2011/03/17     |
|  | 11031700062 | 121212  | <a href="#">Charter</a>   | OCF18    | Submitted | 7         | 2011/03/17     |
|  | 11031700002 | 12      | <a href="#">Barnes</a>    | OCF18    | Submitted | 7         | 2011/03/17     |
|  | 11031800082 | 1975    | <a href="#">Guk</a>       | OCF18    | Unmatched | 8         | 2011/03/18     |
|  | 11031800092 | 1       | <a href="#">Solohe</a>    | OCF18    | Unmatched | 8         | 2011/03/18     |
|  | 11031800102 | 42334   | <a href="#">Nevada</a>    | OCF23    | Unmatched | 3         | 2011/03/18     |

View:  10 items  1 2 Next >

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