pennsylvania
DEPARTMENT OF LABOR & INDUSTRY
WORKERS' COMPENSATION AUTOMATION & INTEGRATION SYSTEM

UTILIZING BUSINESS UNIT FUNCTIONALITY

This How-To Guide describes the process of requesting a new Business Unit and updating a Business Unit on a matter for employers, health care providers, insurers, third party administrators (TPAs), and self-insured employers. This allows different departments and locations to be identified as Business Units and ensure that correspondence is sent to the correct location for applicable matters.

REQUESTING A BUSINESS UNIT

Requesting a Business Unit allows an organization to identify the correct mailing address for different matter types. Once a Business Unit is approved by the commonwealth, future correspondences are mailed to their applicable Business Unit.
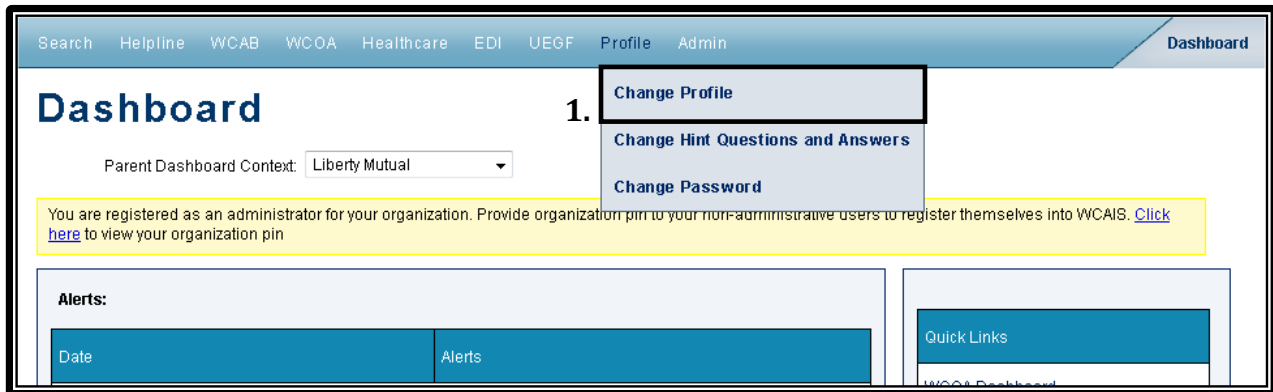

Figure 1: Dashboard Screen

1. Select **Profile → Change Profile** from the **Dashboard**. *(See Figure 1) The Change Profile screen displays. (See Figure 2)*

Figure 2: Change Profile Screen

2. Select the **View/Edit Organization Address** link at the bottom of the **Change Profile** screen. *(See Figure 2) The **View User Type** screen displays.*

3. Scroll to the bottom of the **View User Type** screen to the **Business Unit** section. *(See Figure 3)*
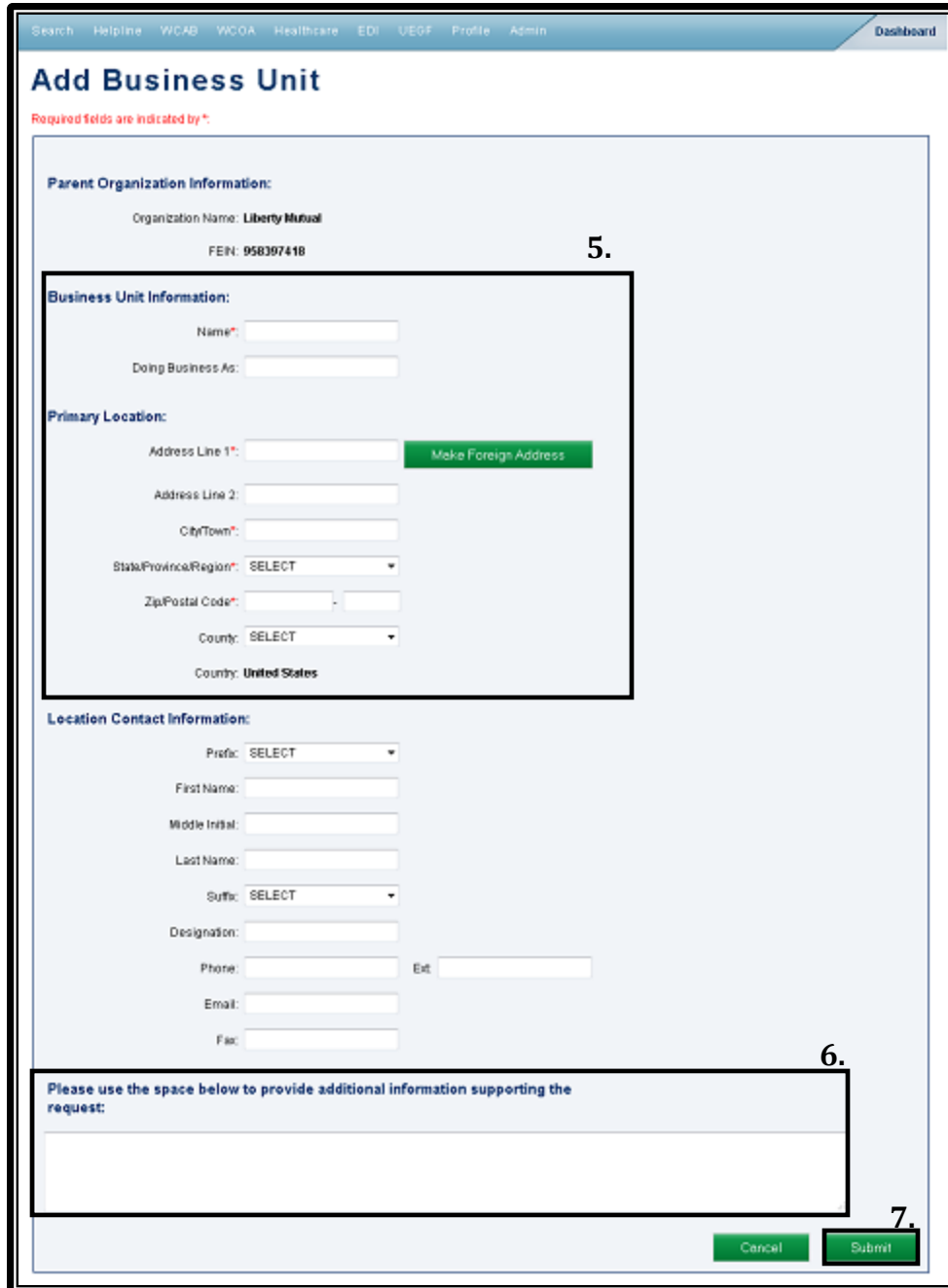
Figure 3: View User Type Screen

4. Select the **Request Business Unit** link in the **Business Units** section. *(See Figure 3) The* **Add Business Unit** *screen displays. (See Figure 4)*

Figure 4: Add Business Unit Screen

5. Enter all necessary information into the required fields designated with an asterisk (*) on the **Add Business Unit** screen. *(See Figure 4)*

6. Enter additional, supporting information for the request at the bottom of the screen. *(See Figure 4)*

7. Press **Submit**. *(See Figure 4) The **View Party Type** screen displays. (See Figure 5)*
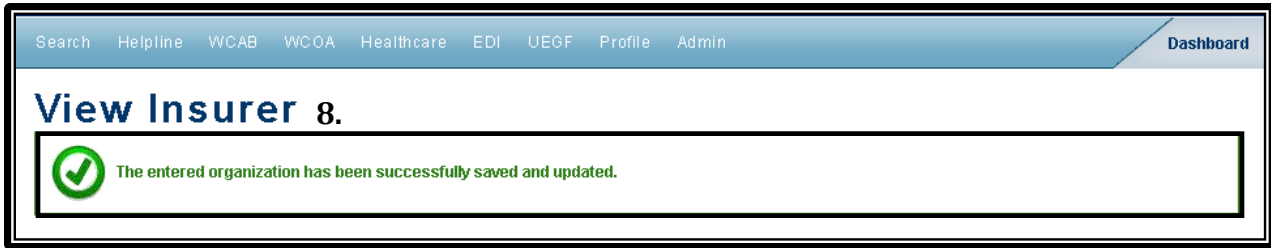
Figure 5: View Party Type Screen

8. Verify the request was submitted by reviewing the confirmation at the top of the screen. *(See Figure 5)*

   NOTE: The requested Business Unit will display in the **Business Unit** section with a "Pending" status.

UPDATING A BUSINESS UNIT ON A MATTER

Updating a Business Unit on a matter enables correspondence pertaining to that matter to be sent to the correct Business Unit and its correct location.

Figure 1: Interested Parties Tab

1. Access the **Interested Parties** tab within the applicable matter. *(See Figure 1)*

2. Select the **Change Party Info** link located in the **Interested Parties** or **Additional Defendants** table. *(See Figure 1) The **Update Matter Party Contact** screen displays. (See Figure 2)*
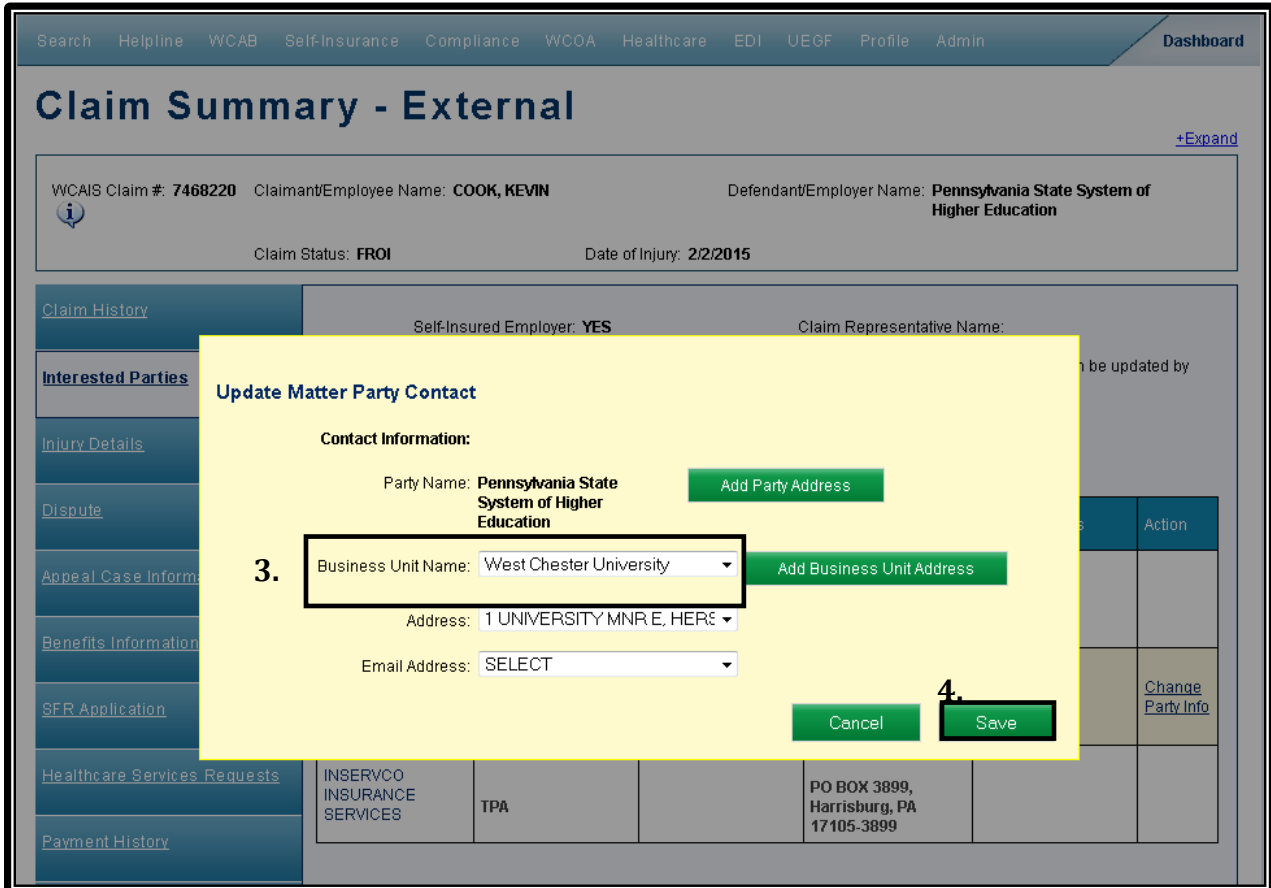

Figure 2: Update Matter Party Contact Screen

3. Select the desired Business Unit from the **Business Unit Name** drop-down menu. *(See Figure 2)*

   NOTE: The selected Business Unit's default address displays in the **Address** drop-down menu.

   NOTE: If the Business Unit selected has additional, affiliated addresses, a different address can be selected from the **Address** drop-down menu.

   NOTE: If the Business Unit selected has an email address, the email address can be selected from the **Email Address** drop-down menu.

4. Press **Save**. *(See Figure 2)*