UTILIZING PARENT-SUBSIDIARY AFFILIATIONS

This How-To Guide describes the process of utilizing the Parent-Subsidiary Affiliation functionality for employers, health care providers, insurers, third party administrators (TPAs), and self-insured employers. Administrative users for the above organizational types have the ability to request Parent-Subsidiary Affiliations, as well as manage Subsidiary matters once Parent-Subsidiary Affiliations are created.

REQUESTING A PARENT-SUBSIDIARY AFFILIATION

This section of the How-To Guide describes the process followed to request a Parent-Subsidiary Affiliation. A Parent-Subsidiary Affiliation should be requested when one or more subsidiaries of a larger organization are being managed by one user. In order to request a Parent-Subsidiary Affiliation, both the parent organization and the subsidiary organization need to exist in WCAIS.

1. Log in to WCAIS using the Keystone ID for the organization that is to be the Parent organization. *The **Dashboard** screen displays. (See Figure 1)*
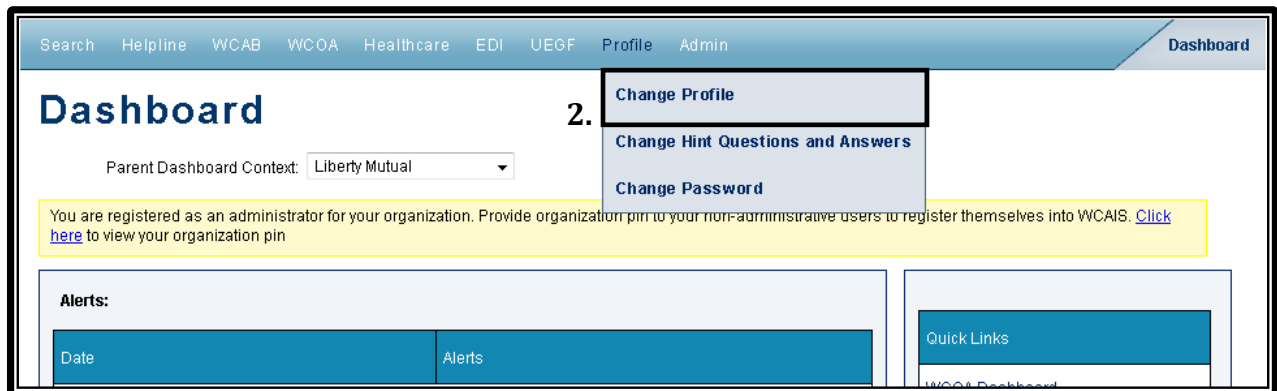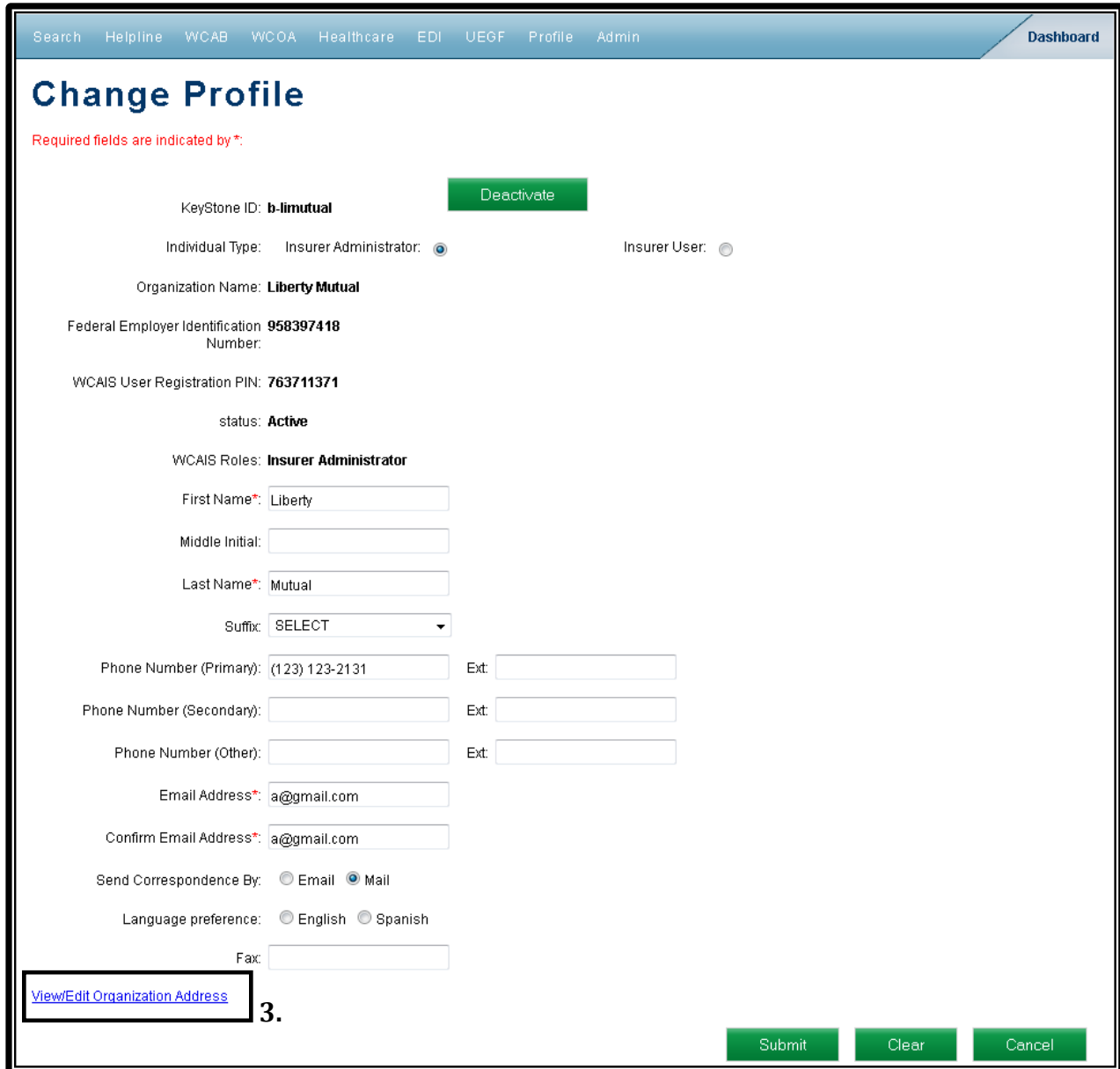

Figure 1: Dashboard Screen

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

Figure 2: Change Profile Screen

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

4. Scroll to the bottom of the **View User Type** screen to the **Subsidiary Organization Type** section. *(See Figure 3)*
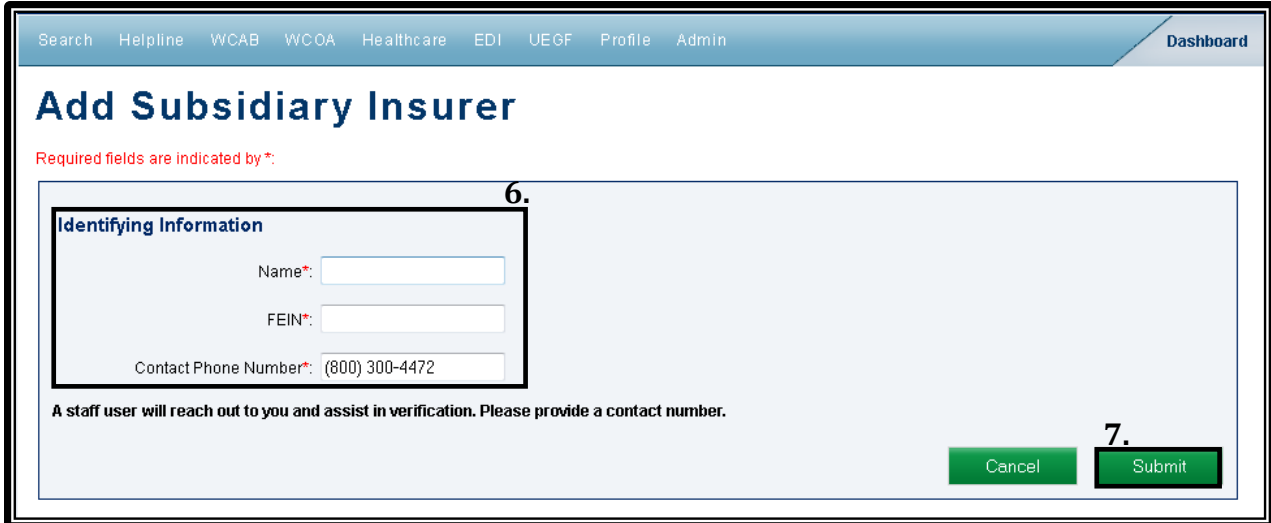
Subsidiary Insurer   4.

Request Insurer   5.

Insurer Name	FEIN	Address	Status	Approval	Effective Date	Effective End Date	Reason
LIBERTY MUTUAL MID-ATLANTIC INSURANCE CO.	473783743	PO Box 3634, Bala Cynwyd, PA 19004-3634	Active	Approved	04/01/2015		
Indiana Insurance Company	673570228	150 LIBERTY WAY, DOVER, NH 03820-9320	Active	Approved	04/02/2015		
Liberty Mutual - SW	789456123	45 Blacksmith Wy, Lititz, PA 17543	Active	Approved	04/17/2015		Test reason here
ADVANTAGE WORKERS COMPENSATION INSURANCE CO	285723725	PO BOX 571918, SALT LAKE CITY, UT 84157-1918		Request More Information	04/23/2015		test
NORGUARD	888452962	PO BOX 1358, WILKES BARRE, PA 18703-1358	Active	Approved	04/23/2015		Test

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Figure 3: View User Type Screen

5. Select the **Request Organization Type** link in the **Subsidiary Organization Type** section. *(See Figure 3) The **Add Subsidiary Organization Type** screen displays. (See Figure 4)*

Figure 4: Add Subsidiary Organization Type Screen

6. Enter all the needed information into the required fields designated with an asterisk (*) on the ***Add Subsidiary Organization* Type** screen. *(See Figure 4)*
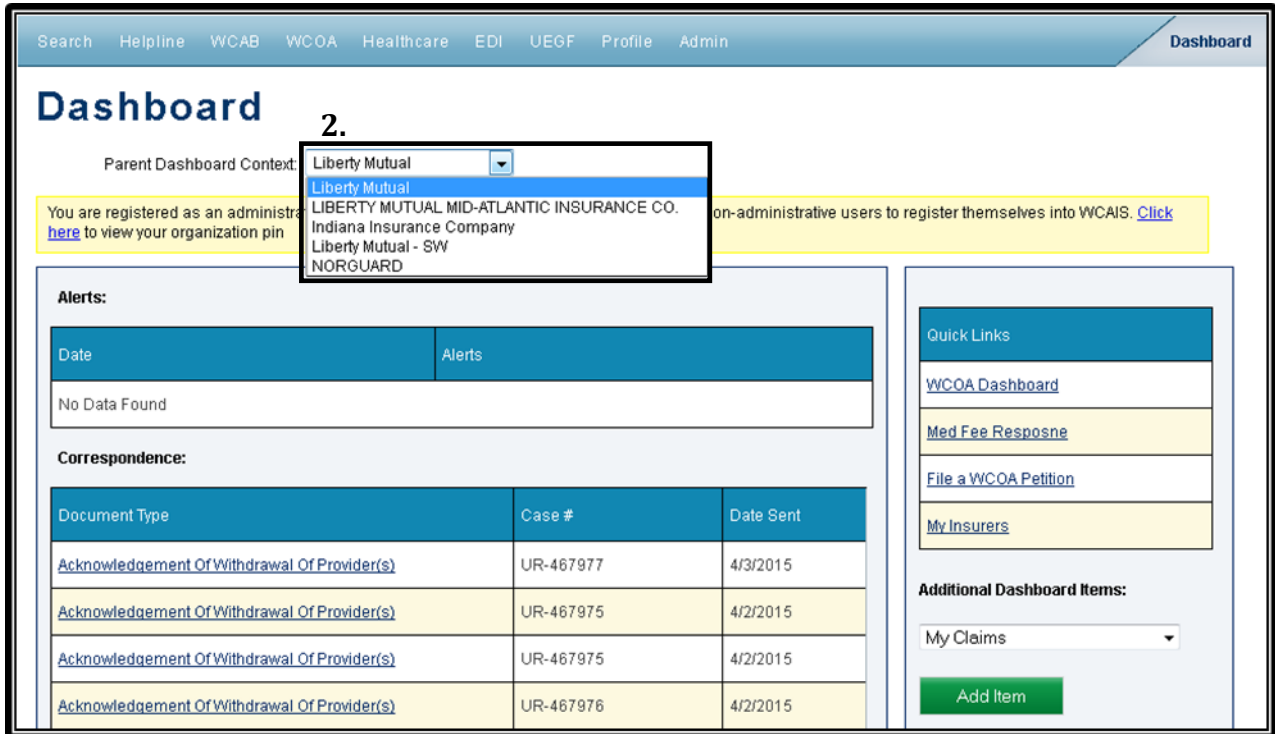
   NOTE: The **Name** field and the **FEIN** field <u>must match</u> an exact organization already existing in WCAIS that is the <u>same</u> **Party Type** as the requesting party.

7. Press **Submit**.

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

UTILIZING SUBSIDIARY DASHBOARD MANAGEMENT

This section of the How-To Guide describes the process followed to utilize a Parent-Subsidiary Affiliation by viewing and managing the subsidiary organization's **Dashboard** while logged in as the parent organization.

1. Log in to WCAIS using the Keystone ID for the organization that is the Parent organization. *The Parent's **Dashboard** screen displays. (See Figure 1)*
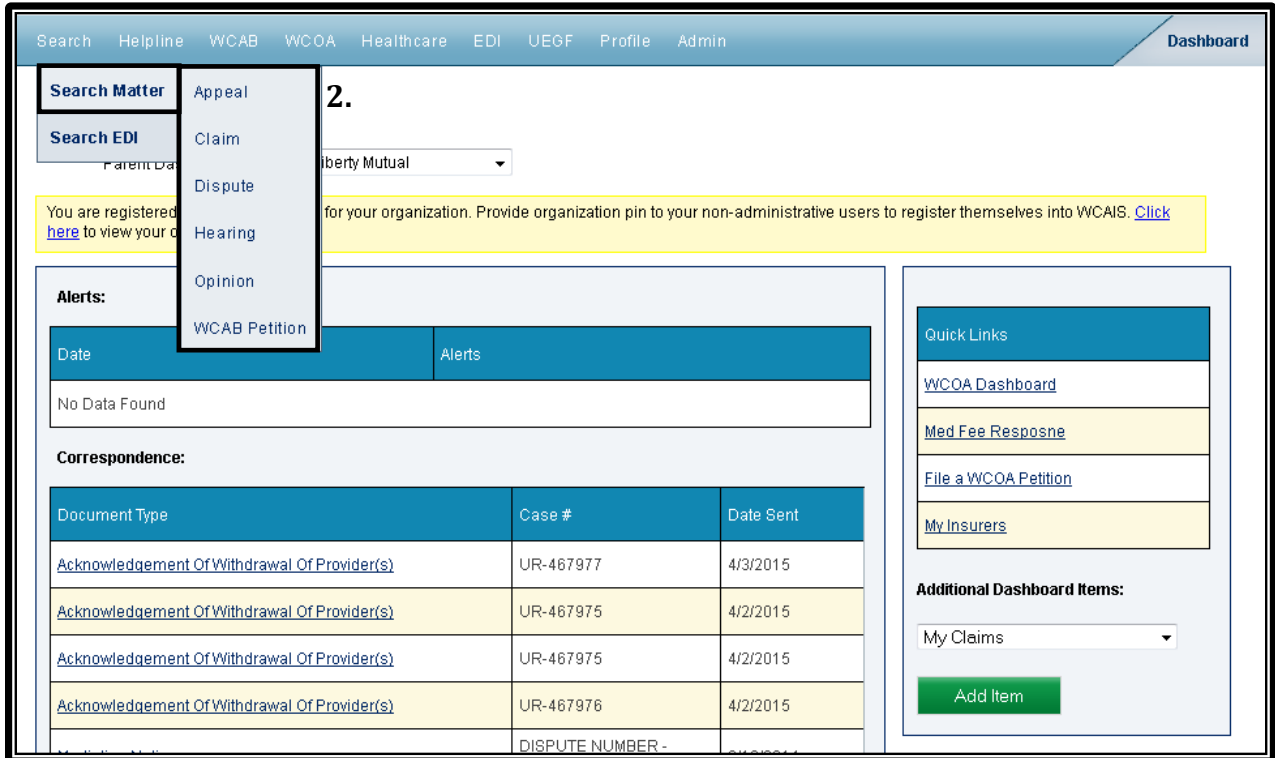

Figure 1: Parent Dashboard Screen

2. Select the subsidiary organization to be managed from the **Parent Dashboard Context** drop-down menu on the **Dashboard**. *(See Figure 1) The Subsidiary's **Dashboard** screen displays.*

![Pennsylvania Department of Labor & Industry - Workers' Compensation Automation & Integration System logo]

SEARCHING AND MANAGING SUBSIDIARY MATTERS

This section of the How-To Guide describes the process followed to utilize a Parent-Subsidiary Affiliation by searching for and managing the subsidiary organization's matters while logged in as the parent organization. This feature is available for users who currently have the ability to perform a matter search

1. Log in to WCAIS using the Keystone ID for the organization that is the Parent organization. *The Parent's **Dashboard** screen displays. (See Figure 1)*
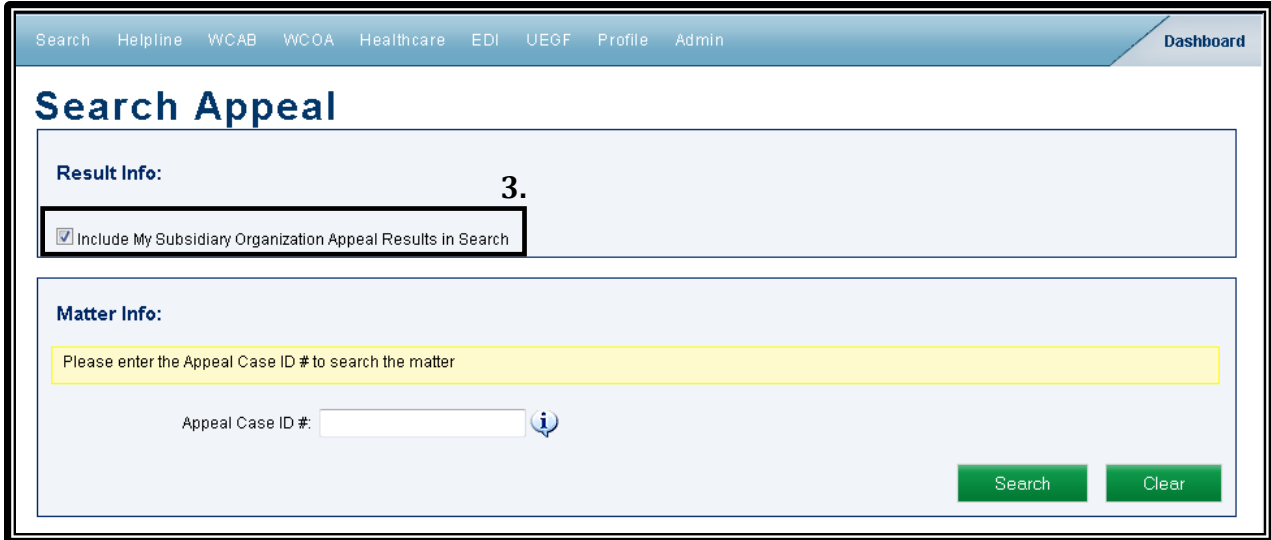

Figure 1: Parent Dashboard Screen

2. Select **Search** → **Matter** → and then select any matter type from the **Dashboard**. *(See Figure 1) The **Search Matter Type** screen displays. (See Figure 2)*

Figure 2: Search Matter Type Screen

3. Check the **Include My Subsidiary Organization Matter Type Results in Search** box in the **Result Info** section. *(See Figure 2)*

4. Perform a search.