

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.

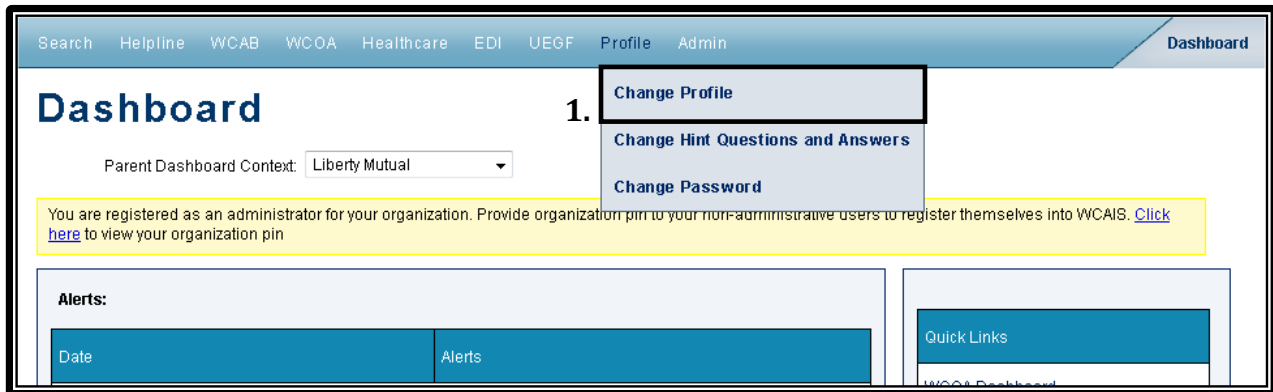


Figure 1: Dashboard Screen

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

Search Helpline WCAB WCOA Healthcare EDI UEGF Profile Admin **Dashboard**

Change Profile

Required fields are indicated by *:

KeyStone ID: **b-limutual** [Deactivate](#)

Individual Type: Insurer Administrator: Insurer User:

Organization Name: **Liberty Mutual**

Federal Employer Identification Number: **958397418**

WCAIS User Registration PIN: **763711371**

status: **Active**

WCAIS Roles: **Insurer Administrator**

First Name*:

Middle Initial:

Last Name*:

Suffix:

Phone Number (Primary): Ext:

Phone Number (Secondary): Ext:

Phone Number (Other): Ext:

Email Address*:

Confirm Email Address*:

Send Correspondence By: Email Mail

Language preference: English Spanish

Fax:

[View/Edit Organization Address](#) **2.**

[Submit](#) [Clear](#) [Cancel](#)

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)

Associated Documents

Document Type	Document Description	Submitted Date	Submitted By	Submission Method	Batch Number
No Data Found					

Business Units

3.

[Request Business Unit](#)

4.

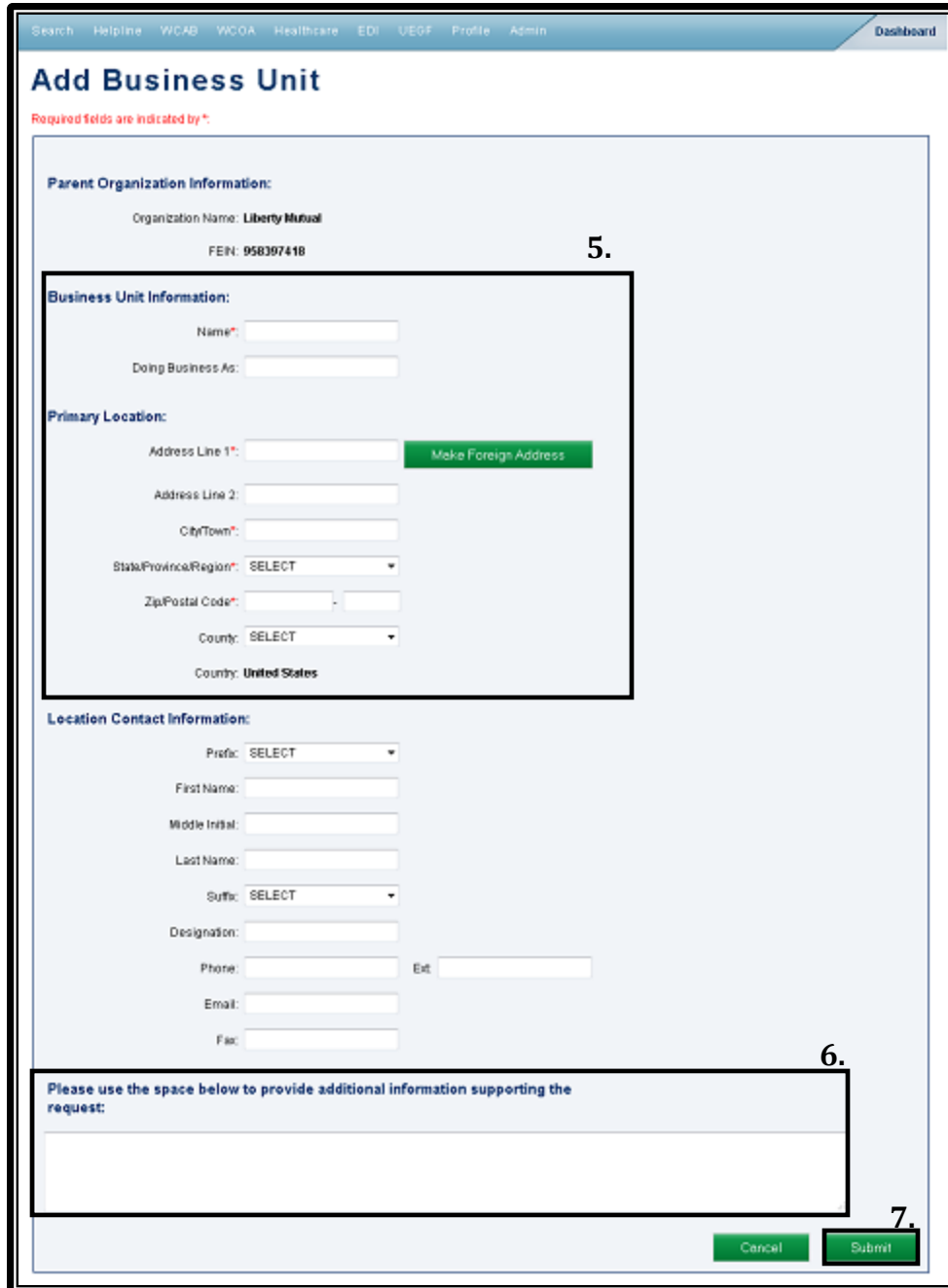
Business Unit Name	Address	Status	Approval	Effective Date	Effective End Date	Reason
Hershey	85 Heshey Drive, Hershey, PA	Active	Approved	04/23/2015		
LM Camp Hill	12 S MARKET ST, CAMP HILL, PA	Active	Approved	04/01/2015		
Philadelphia	56 E King St, Lancaster, PA	Active	Approved	04/02/2015		

Child Insurer

[Request Insurer](#)

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)



Search Helpline WCAB WCOA Healthcare EDI UEGF Profile Admin Dashboard

Add Business Unit

Required fields are indicated by *.

Parent Organization Information:

Organization Name: Liberty Mutual
FEIN: 958397418

Business Unit Information:

Name*:

Doing Business As:

Primary Location:

Address Line 1*: [Make Foreign Address](#)

Address Line 2:

City/Town*:

State/Province/Region*:

Zip/Postal Code*: -

County:

Country: United States

Location Contact Information:

Prefix:

First Name:

Middle Initial:

Last Name:

Suffix:

Designation:

Phone: Ext:

Email:

Fac:

Please use the space below to provide additional information supporting the request:

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)

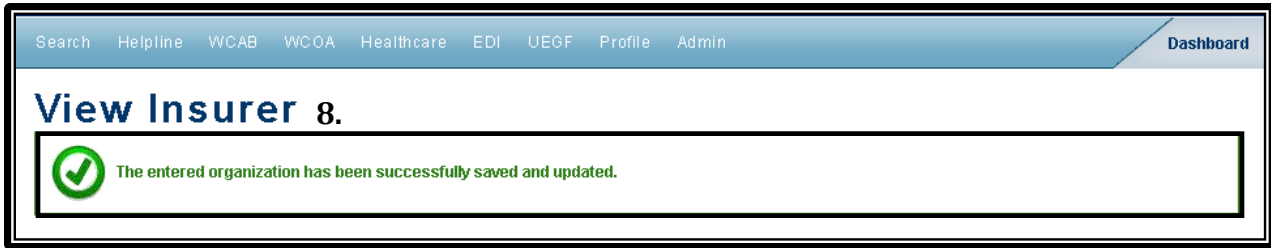


Figure 5: View Party Type Screen

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.



Claim Summary - External +Expand

WCAIS Claim #: 7468220 Claimant/Employer Name: **COOK, KEVIN** Defendant/Employer Name: **Pennsylvania State System of Higher Education**

Claim Status: **FROI** Date of Injury: 2/2/2015

Self-Insured Employer: **YES** Claim Representative Name:

Below are the Interested Parties and Associated Recipients for this Matter. The correspondence address can be updated by selecting "Change Address" option. A new address can be added by selecting the "Add Address" option.

Interested Parties

Name	Type	Business Unit	Correspondence Address	Email Address	Action
KEVIN COOK	Claimant/Employer		5580 PIN OAK DR, EDINBORO, PA 16412		
Pennsylvania State System of Higher Education	Defendant/Employer	West Chester University	1 UNIVERSITY MNR E, HERSHEY, PA 17033-2801	2.	Change Party Info
INSERVCO INSURANCE SERVICES	TPA		PO BOX 3899, Harrisburg, PA 17105-3899		

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)

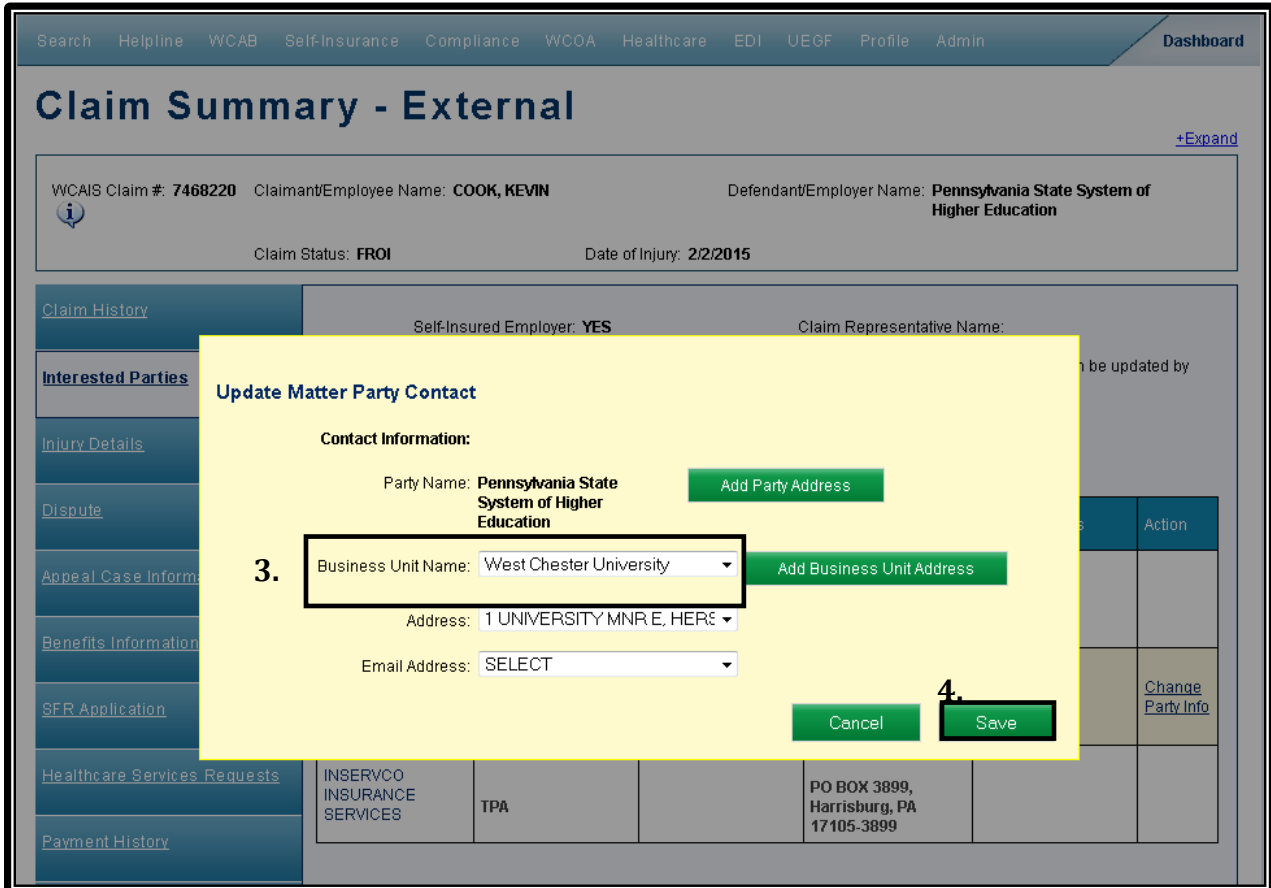


Figure 2: Update Matter Party Contact Screen

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)