

## **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.

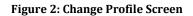
Sea	rch He	pline	WCAB	WCOA	Healthcare	EDI	UEGF	Profile Admin Dashboard
D	ash	bo	ard				1.	Change Profile
-			ooard Cont	ext: Liber	ty Mutual	•		Change Hint Questions and Answers Change Password
	u are regis <sup>.</sup> <u>re</u> to view y				your organizatio	on. Provi	de organiza	t <mark>on pin to your non-administrative users to reg</mark> ister themselves into WCAIS. <u>Click</u>
þ	lerts:							
	)ate				Al	erts		Quick Links

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 W	ICOA Healthcare EDI	UEGF Profile	Admin			Dashboard
Change Profi	ile					
Required fields are indicated by*:						
KeyStone ID:	b-limutual	Deactivate	l			
Individual Type:	Insurer Administrator: 🏾 💿		Insurer User: (	0		
Organization Name:	Liberty Mutual					
Federal Employer Identification Number:						
WCAIS User Registration PIN:	763711371					
status:	Active					
WCAIS Roles:	Insurer Administrator					
First Name*:	Liberty					
Middle Initial:						
Last Name*:	Mutual					
Suffix:	SELECT -	]				
Phone Number (Primary):	(123) 123-2131	Ext:				
Phone Number (Secondary):		Ext:				
Phone Number (Other):		Ext:				
Email Address*:	a@gmail.com					
Confirm Email Address*:	a@gmail.com					
Send Correspondence By:	🖱 Email 🔘 Mail					
Language preference:	🔘 English 🔘 Spanish					
Fax:						
View/Edit Organization Address 2						
				Submit	Clear	Cancel



- 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 Description	Submitte	d By	Submission Method	Batch Numbe	er					
No Data Found											
Business Units Request Business Uni	3. 4.										
Business Unit Name	Address	Status	Approval	Effective Date	Effective End Date	Reason					
<u>Hershey</u>	85 Heshey Drive, Hershey, PA	Active	Approved	04/23/2015							
LM Camphill	12 S MARKET ST, CAMP HILL, P	A Active	Approved	04/01/2015							
Philadelphia	56 E King St, Lancaster, PA	Active	Approved	04/02/2015							
Child 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)

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

Search Helpline WCAB WCC	A Healthcare EDI	UEGF Profile Admin	Dashboa	nd
Add Business	Unit			
Required fields are indicated by *:	•			
				1
Parent Organization Informat	ion:			
Organization Name:		_		
FEIN	958397418	5	). 	
Business Unit Information:				
Name*:				
Doing Business As:				
Primary Location:				
Address Line 1*:		Meke Foreign Address		
Address Line 2:				
City/Town*:				
State/Province/Region*:	SELECT .			
Zip/Postal Code*:				
County:	SELECT .			
Country:	United States			
Location Contact Information	c			
Prefix:	SELECT .			
First Name:				
Middle Initial:				
Last Name:				
	SELECT -			
Designation: Phone:				
Phone: Email:		Ext		
Email: Fac				
			6.	
Please use the space below: request:	to provide additional in	formation supporting the		
			Cancel Submit	

## 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)



Search	Helpline	WCAB	WCOA	Healthcare	EDI	UEGF	Profile	Admin		Dashboard		
Vie	View Insurer 8.											
Ø	The entered organization has been successfully saved and updated.											

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										
WCAIS Claim #: 7468220 Claimant/Employee Name: COOK, KEVIN Defendant/Employer Name: Pennsylvania State System of Higher Education										
	Status: FROI	Date of	İnjury: <b>2/2/2015</b>							
Claim History Self-Insured Employer: YES Claim Representative Name:										
Interested Parties	Interested Parties 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.									
Injury Details	Interested Parties									
<u>Dispute</u>	Name	Туре	Business Unit	Correspondence Address	Email Address	Action				
Appeal Case Information	KEVIN COOK	Claimant/Employee		5580 PIN OAK DR, Edinboro, Pa 16412						
Benefits Information SFR Application	Pennsylvania State System of Higher Education	Defendant/Employer	West Chester University	1 UNIVERSITY MNR E, HERSHEY, PA 17033-2801	2.	<u>Change</u> Party Info				
<u>Healthcare Services Requests</u>	INSERVCO INSURANCE SERVICES	ТРА		PO BOX 3899, Harrisburg, PA 17105-3899						
Payment History										

**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)*

Search Helpline	WCAB Se	lf-Insurance Comp	liance WCOA He	ealthcare EDI	I UEGF Profile	Admin	Dashboard			
Claim Summary - External										
+Expand										
WCAIS Claim #: 746	<b>8220</b> Claima	nt/Employee Name: CO	IOK, KEVIN	Defe	ndant/Employer Name	Pennsylvania State Higher Education	System of			
	Claim :	Status: FROI	Date of	Injury: <b>2/2/2015</b>						
<u>Claim History</u>		Oalfdrau				- H				
		Seit-Insu	ired Employer: YES		Claim Represent	ative iname:	h be updated by			
Interested Parties	Update M	atter Party Contact	:							
Injury Details		Contact Information:								
			Pennsylvania State System of Higher	Add P	Party Address					
<u>Dispute</u>			Education				a Action			
Appeal Case Inform	3.	Business Unit Name:	West Chester Unive	rsity 👻	Add Business Unit A	ddress				
Benefits Information		Address:	1 UNIVERSITY MNR	r e, hers 🗸						
Denents mormation		Email Address:	SELECT	-		4	Change			
SFR Application					Cancel	4. Save	Party Info			
Healthcare Services	Requests	INSERVCO								
		INSURANCE SERVICES	TPA		PO BOX 3899, Harrisburg, PA 17105-3899					
<u>Payment History</u>					17 103-3035					
Payment History		SERVICES			17105-3899					

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)