
  
**The Ins and Outs of WCAIS**



Dauphin County Bar Association  
August 12, 2016

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**Agenda**

<b>Dashboard</b>
<b>WCOA Dashboard</b>
<b>Enhanced Search</b>
<b>Dispute Summary vs. Claim Summary</b>
<b>Dispute Summary Tabs</b>
<b>Entry of Appearance</b>
<b>Tips for Managing Matters</b>
<b>Withdrawal of Appearance</b>



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**Dashboard**

**Dashboard**



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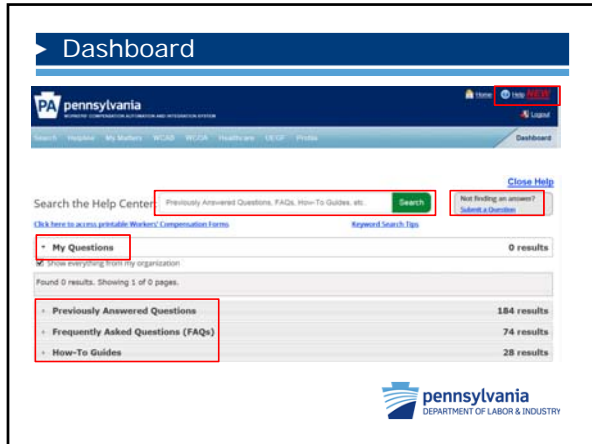
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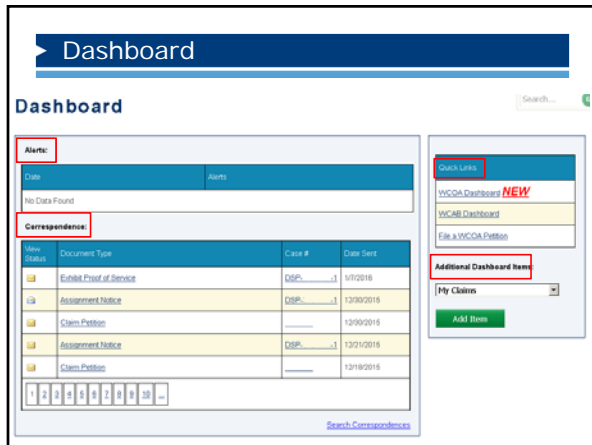
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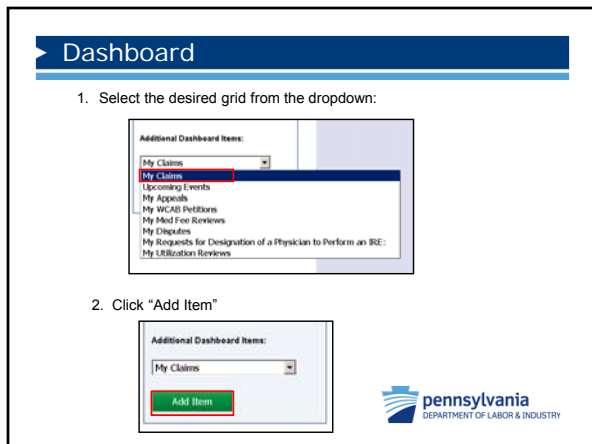
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**WCOA Dashboard**

The "WCOA Requests" grid displays information about requests submitted on your associated matters.

The columns include Dispute Number, Request Type, Submitted Date, Filed By, Claimant Name, Employer Name, Last Updated Date, and Status. All Columns are sortable.

There are three status types: Approved, Denied and Pending.

Dispute Number #	Request Type	Submitted Date	Filed By	Claimant/Employer Name	Defendant/Employer Name	Last Updated Date	Status
DSP-1	Brief Extension Request	1/14/2015	ESG		IMC	1/14/2015	Denied
DSP-1	Continuance Request	5/20/2015	ESG		Unlimited, Inc.	1/20/2015	Approved
DSP-1	Continuance Request	1/14/2015	ESG			1/14/2015	Pending
DSP-1	Judge Reassignment	1/14/2015	ESG			1/14/2015	Pending

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**WCOA Dashboard**

The "Judge Communication" grid displays letters sent from the Judge's office.

The columns include Mark as Read, Date, Dispute Number, Claimant Name, Judge Name, the content of the letter and delete.

If you delete a Judge Communication it will be removed from your WCOA Dashboard but it will remain in the Documents & Correspondence tab of the dispute.

All of the columns are sortable.

Mark as Read	Date	Dispute Number	Claimant Name	Judge Name	Judge Letter	Action
<input type="checkbox"/>	2/22/2016	DSP-1 211332-3	Worm, FREDRICK	Crook, David	Judge Communication	Delete
<input type="checkbox"/>	2/22/2016	DSP-1 211332-3	Worm, FREDRICK	Crook, David	Judge Communication	Delete
<input checked="" type="checkbox"/>	11/24/2015	DSP-1 200300-1	MCCLETTIGAN, JOHN	High, Tim Hane	Counsel: I have no problem with the Claimant testifying live at the December 6, 2015 hearing. Happy Thanksgiving!	Delete

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**Enhanced Search**

**Enhanced Search**




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**Enhanced Search Feature Tips**

The tips below show how to use the search feature effectively.

**Tip 1:** Use the drop-down menu to identify what you are searching for (e.g., Claim, Dispute, etc.)

**Tip 2:** Enter multiple search terms to create a stronger search

**Tip 3:** Use special characters to define your search

Special Character	How It Works	Sample Search
<b>*</b> Asterisk	Add * at the start or end of a term when information is missing or unknown.	*1111 Finds all Parties and Matters with SSNs that end with 1111
<b>" "</b> Double Quotation Marks	Apply " " around a single search term or phrase to find an exact match for the entered information.	"02/22/2015" Finds all results that have 02/22/2015 in their Profiles or Matters
<b>~</b> Tilde	Add ~ to the end of the term to find results with spelling variations.	Megan~ Finds results that are variations of the name Megan, such as Meghan or Meaghan
<b>OR</b>	Use OR between search terms to broaden your search results by including more than one keyword.	Wal-Mart or Walmart Finds all results that contain either Wal-Mart or Walmart

Example: Select Claimant from the drop-down menu, then enter Williams Megan~ \*1111 to search for the claimant by last name, variations of her first name, and her SSN.

**Tip 4:** Use Advanced Search fields to filter results by a specific search term or criteria (e.g., Open, Close, etc.)

Example: Select Open from the Appeal Status drop-down menu to search for only open Appeals

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**Dispute Summary vs. Claim Summary**

## Dispute Summary vs. Claim Summary




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**Dispute Summary vs. Claim Summary**

**Claim Summary**



The following tabs are available from the **Claim Summary** screen:

- Claim History
- Interested Parties
- Injury Details
- Dispute
- Appeal Case Information
- Benefits Information
- SFR Application
- Healthcare Services Requests
- Payment History
- Actions
- Documents and Correspondence
- EDI Transaction

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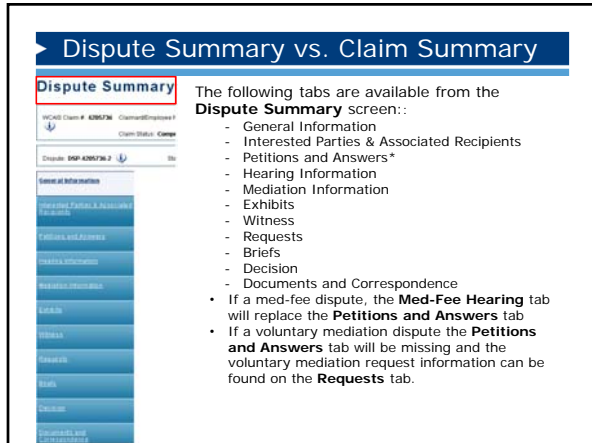
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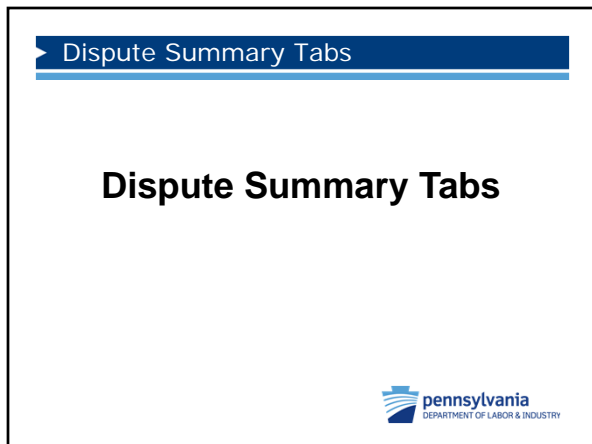
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### General Information Tab

**General Information** [View Dispute Business Event Log](#)

Listed below are basic details for the selected Dispute:


Dispute Status: **In Litigation**  
 Assigned Judge: **Cicola, David**

This is an Act 48 (firefighter cancer) claim

Instructions from the Judge: **These are instructions from the Judge.**

Listed below are the Event details for the selected Dispute. This information is regarding the next scheduled Event for the Dispute:

Next Scheduled Event: **10/5/2016**  
 Event Start Time: **8:30AM**  
 Event Type: **Voluntary Mediation**  
 Event Location: **Altoona Field Office**




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### Instructions from the Judge

A red "view" link will be added to the My Disputes widget of the dashboard to alert the user when new Instructions from the Judge are added.

**My Disputes:**

Dispute Number	Claimant/Employee Name	Judge	Status	Claim Number	New Instructions from the Judge <a href="#">View</a>
DSP_...			Waiting For Decision		
DSP_...			In Litigation		
DSP_...			Waiting For Decision		
DSP_...			Waiting for Briefs		
DSP_...			New Assignment		

1 2 3 4

[X Remove from Dashboard](#)

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### General Information Tab

**General Information** [View Dispute Business Event Log](#)

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 Event Type: **Voluntary Mediation**  
 Event Location: **Altoona Field Office**




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**Associated Recipients Grid**

- Receive correspondence
- NO electronic access to the dispute
- NO ability to file documents, requests, exhibits, etc.

**Associated Recipients**

Name	Type	Business Unit	Correspondence Address	Email Address
ESQ	Claimant's Attorney ( JOHN )		GREENSBURG, PA 15601 -2654	wcais.test@t




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**Additional Defendant/Employer Grid**

Party types in Additional Defendant/Employer grid:

- Defendant/Employer
- Insurer
- TPA
- Attorneys for the parties listed above only

**Additional Defendants/Employers**

Name	Type	Business Unit	Correspondence Address	Email Address
	Defendant/Employer		Philadelphia, PA 19148-1400	
ESQ	Defendant's Attorney		Philadelphia, PA 19148-2921	wcais.test@t
SERVICES	TPA		Parsippany, NJ 07054-5000	

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**Additional Defendant/Employer Grid**

- Receive correspondence
- Electronic access to the dispute
- Ability to file documents, requests, exhibits, etc.

**Additional Defendants/Employers**

Name	Type	Business Unit	Correspondence Address	Email Address
	Defendant/Employer		Philadelphia, PA 19148-1400	
ESQ	Defendant's Attorney		Philadelphia, PA 19148-2921	wcais.test@t
SERVICES	TPA		Parsippany, NJ 07054-5000	

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### Exhibits Tab

**Add Exhibits**

To submit an exhibit please complete the required fields below. The exhibit will be submitted to the assigned Judge for review.

**CAUTION:** Make sure the document type you select from the dropdown reflects the document type you are uploading. **If uploading a Deposition Transcript, make sure you select "Deposition Transcript" from the dropdown.** Only the submitting party can view "Deposition Transcript", but all other documents are viewable by other parties to the matter.

**Submit Exhibit**

Exhibit Name:   Supercedes Exhibit

Description:

**Attached Documentation**

Upload Document

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### Exhibits Tab

**Add Exhibits**

To submit an exhibit please complete the required fields below. The exhibit will be submitted to the assigned Judge for review.

**CAUTION:** Make sure the document type you select from the dropdown reflects the document type you are uploading. **If uploading a Deposition Transcript, make sure you select "Deposition Transcript" from the dropdown.** Only the submitting party can view "Deposition Transcript", but all other documents are viewable by other parties to the matter.

**Submit Exhibit**

Exhibit Name:   Supercedes Exhibit

Description:

**Attached Documentation**

Upload Document

Document Sub Category:

Document Type:

- Exhibits
- Compliance and Release Agreements
- Deposition Transcript
- Evidence and Draft Findings
- Exhibit
- Fee Agreement
- Check of Records
- Declarations

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### Exhibits Tab

**Submit Exhibit**

Exhibit Name:   Supercedes Exhibit

Description:

**Attached Documentation**

Upload Document

Document Sub Category:

Document Type:

Uploaded documents may not exceed 10MB

Upload Document:

Document Description:

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### Exhibits Tab

Submit Exhibit

Exhibit Name:   Supersedes Exhibit

Description:

**Attached Documentation**

Document Type	Document Description	Submitted Date	Submitted By	Submission Method	Batch Number	Delete
Exhibit	First Exhibit	01/26/2016	JOHN	Online		<input type="button" value="Delete"/>

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### Exhibits Tab

Added Exhibits

Exhibit Name	Description	Action	Delete
Name	Description	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

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### Exhibits Tab

PLEASE NOTE: The exhibit information will only take effect if you have completed all required information and have submitted the exhibit information to the system. The exhibit information will only be visible to the public once you have submitted the exhibit information to the system.

Submitted Exhibits

Exhibit ID	Exhibit Name	Description	Submitted Date	Submitted By	Submission Method	Batch Number	Delete
1	Exhibit 1	Exhibit 1 Description	01/26/2016	JOHN	Online		<input type="button" value="Delete"/>
2	Exhibit 2	Exhibit 2 Description	01/26/2016	JOHN	Online		<input type="button" value="Delete"/>
3	Exhibit 3	Exhibit 3 Description	01/26/2016	JOHN	Online		<input type="button" value="Delete"/>
4	Exhibit 4	Exhibit 4 Description	01/26/2016	JOHN	Online		<input type="button" value="Delete"/>

Submitted Responses

Response ID	Response Name	Description	Submitted Date	Submitted By	Submission Method	Batch Number	Delete
1	Response 1	Response 1 Description	01/26/2016	JOHN	Online		<input type="button" value="Delete"/>

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### Requests Tab

- Request disposition can be found on the Requests tab of the Dispute Summary.

**Request History**

Below is a summary of all Requests received on the Dispute. To view the details of a Request, select the hyperlinked Request Type.

Date Submitted	Submitting Party	Request Type	Request Status
3/31/2014		Miscellaneous Request	Approved
4/01/2014		Miscellaneous Request	Denied
11/14/2014		Continuance Request	Pending




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### Briefs Tab

Below is a list of Brief Schedules that have been set by the assigned Judge. To submit a Brief or Request for a Brief Extension, select the respective action from the drop-down and select the "Continue" option.

**My Brief Schedule**

Select One	Submitting Party	Brief Due Date	Date Submitted	Briefs	Document Description
<input type="checkbox"/>	Attorney (Claimant's)	12/24/2015			

Action:


Sched:

**Scheduled Briefs for Interested Parties**

Submitting Party	Brief Due Date	Date Submitted	Action
Claimant	12/24/2015	12/24/2015	Done
Attorney	12/24/2015	12/24/2015	Done
Attorney	12/24/2015	12/24/2015	Done

**Brief Extension Request History**

Submitting Party	Brief Due Date	Date Extension Request Received	Approval
Claimant's Attorney	12/24/2015	12/24/2015	Done




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### Briefs Tab


Below is a list of Brief Schedules that have been set by the assigned Judge. To submit a Brief or Request for a Brief Extension, select the respective action from the drop-down and select the "Continue" option.

**My Brief Schedule**

Select One	Submitting Party	Brief Due Date	Date Submitted	Briefs	Document Description
<input type="checkbox"/>	Attorney (Claimant's)	12/24/2015			

Action:

Sched:




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### Letter to the Judge

- The user who uploaded the Letter to Judge is able to edit the description.
- The Document Description should briefly summarize the content of the uploaded document (for example: Notice of Deposition or First Hearing Submission).

**Dispute Summary**

WCARE Claim # [redacted] Claimant/Employer Name [redacted] Defendant/Employer Name [redacted]  
 Claim Status: No PRCI Date of Injury: 8/29/2008 View Claim Summary

Dispute: [redacted] Status: In Litigation View Dispute Summary

**Associated Documents**

Below is a list of all WCOA Documents associated with the Dispute that are not classified as Exhibits, Requests, Briefs, or Mediation Statements. To submit a miscellaneous letter/document to the Judge, select the "Submit Letter to Judge" hyperlink.

Document Type	Document Description	Submitted Date	Submitted By	Submission Method	Batch Number	Edit
Letter to the Judge	[redacted]	12/10/2015	JCHN	Online		[redacted]

Submit Letter to Judge

**Correspondence**

Below is a list of all WCOA Correspondence sent to all Parties for the Dispute. To view Correspondence, select the Document Title hyperlink.

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### Letter to the Judge

**Dispute Summary**

WCARE Claim # [redacted] Claimant/Employer Name [redacted] Defendant/Employer Name [redacted]  
 Claim Status: No PRCI Date of Injury: 8/29/2008 View Claim Summary

Dispute: [redacted] Status: In Litigation View Dispute Summary

**Associated Documents**

Below is a list of all WCOA Documents associated with the Dispute that are not classified as Exhibits, Requests, Briefs, or Mediation Statements. To submit a miscellaneous letter/document to the Judge, select the "Submit Letter to Judge" hyperlink.

Document Type	Document Description	Submitted Date	Submitted By	Submission Method	Batch Number	Edit
Letter to the Judge	[redacted]	12/10/2015	JCHN	Online		[redacted]

Submit Letter to Judge

**Correspondence**

Below is a list of all WCOA Correspondence sent to all Parties for the Dispute. To view Correspondence, select the Document Title hyperlink.

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### Letter to the Judge

- The Judge receives a notification which includes the document description.

**Notification Details**

Date: Dec 09, 2015

From: Data Quality Team

A letter to Judge with Document Description [redacted] has been submitted by -Submitting Party for -[Dispute Number]-. This document is available for viewing in the Dispute Summary.

Back Delete

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**Documents & Correspondence Tab**

**Associated Documents**  
Below is a list of all HCCA Documents associated with the Dispute that are not classified as Exhibits, Requests, Offers, or Mediation Statements. To submit a miscellaneous reference document to the Judge, select the "Submit Letter to Judge" option.

Document Type	Document Description	Document Code	Submitted By	Submission Method	Entry Number	DOB
Letter to Judge						

**Submit Letter to Judge**

**Correspondence**  
Below is a list of all HCCA Correspondence sent to all Parties for the Dispute. To view Correspondence, select the Document Tab Hyperlink.

Document Type	Language	Send Code	Send Time	Status	Recipients	View Profile
Request to Plead	English	01/06/2016	02:05:40 PM	Generated	<ul style="list-style-type: none"> <li>Defendant (Mail)</li> <li>Defendant (Mail)</li> <li>SERVICES (Mail)</li> <li>CTPA</li> <li>DefendantEmployer</li> <li>ClaimantEmployer</li> <li>INSURANCE CO (Mail)</li> <li>LAGI</li> <li>ClaimantEmployer</li> </ul>	View

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**Documents & Correspondence Tab**

**View Recipients**

Type	Name and Address
Defendant's Attorney	PA 18148 Philadelphia
Defendant's Attorney	PA 18148 BETHLEHEM
TRA	PA 17138 SERVICES
TRA	NY 10215 SERVICES Syracuse
Defendant Employer	Department of Labor, PA 19003
Claimant Employer	PA 16882 Shipshewer
Insurer	PA 16812 Reading INSURANCE CO
Defendant Employer	PA 17138 LAGI Harrisburg

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**Entry of Appearance**

**Entry of Appearance**




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**Entry of Appearance**

**Dashboard**

**Request for Entry of Appearance**

**Request for Entry of Appearance**

Enter the WCAIS Claim Number and the Date Of Injury (DOI) Claimant's SSN and Date of Injury.

WCAIS Claim Number:  Date of Injury:

Claimant's SSN #:

I hereby certify that I am this day serving my entry of appearance in the claim above upon the persons and in the manner indicated below, which service satisfies the requirements of the Pennsylvania Workers' Compensation Act, 77 P.S. § 5, et seq. and relevant regulations. I understand that all parties to this matter must be provided with an electronic or paper copy of my entry of appearance in this matter.

Cancel Submit

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**Entry of Appearance**

- When the same party type exists in two grids, i.e. defendant "A" in the Interested Parties grid and defendant "B" in the Additional Defendant/Employer grid and the attorney requests entry of appearance for the defendant, the system will require the attorney to enter the FEIN to distinguish which Defendant is being represented by that attorney.
- If the FEIN is unknown, the attorney must contact WCOA to enter appearance.

**Request for Entry of Appearance**

**Request for Entry of Appearance**

There are some errors in the form below. Please correct the following errors before proceeding.

Please enter FEIN or check Unknown to proceed

To submit a Request for Entry of Appearance, select a party below. Once a party is selected additional fields will display.

Please select the party on whose behalf you are entering your appearance.

Below the WCAIS Claim Number and the Date Of Injury (DOI) Claimant's SSN and Date of Injury.

WCAIS Claim Number:  Date of Injury:

Claimant's SSN #:  FEIN:

I hereby certify that I am this day serving my entry of appearance in the claim above upon the persons and in the manner indicated below, which service satisfies the requirements of the Pennsylvania Workers' Compensation Act, 77 P.S. § 5, et seq. and relevant regulations. I understand that all parties to this matter must be provided with an electronic or paper copy of my entry of appearance in this matter.

Cancel Submit

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**Entry of Appearance**

**Dashboard**

**Multiple Request for Entry of Appearance**

**Multiple Request for Entry of Appearance**

List of Claims

Select All	Claim #	Claimant/Employer Name	Date of Injury	Defendant/Employer Name	Insurer
<input type="checkbox"/>	237829	HERNANDEZ, Walter	5/24/2001	ARAMARK CORP	LUMBERMENS MUTUAL CASUALTY COMPANY
<input type="checkbox"/>	163688	HILLIARD, DAVID	7/7/1996	SYSCO FOOD SERVICES OF PHILADE	INSURANCE CO OF THE STATE OF PENNSYLVANIA

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Tips for Managing Matters

Tips for Managing Matters



Horizontal lines for notes

Tips for Managing Parties

- There may be instances when the law firm has two attorneys working on a matter. However, there can only be one attorney of record. In other words, the client can only have one attorney listed for them in the Interested Parties grid.
• Having more than one attorney listed for the same party in the interested parties grid causes correspondence to not generate.
• If you have multiple attorneys at your firm working on a single matter there are three options.



Horizontal lines for notes

Tips for Managing Parties

- Option #1:
• If secondary attorneys need to be able to access the matter in WCAIS, receive correspondence, and file documents:
• The secondary attorney needs to register as a law firm user and then obtain approval in WCAIS from the attorney of record to perform work on their behalf.
• Presumably, the secondary attorney will have two keystone IDs. One will be the keystone ID registered as an attorney and the other as a law firm user.
• If the secondary attorney is attorney of record on some matters then they will use their attorney keystone ID when performing work on their own matters. When they are performing work on matters where they are not attorney of record, they will use their law firm user keystone ID.



Horizontal lines for notes

**Tips for Managing Parties**

**Manage access to My Matters with Law Firm Users**

My Law Firm Users

User ID	User Name	User Role
01	John Doe	Admin
02	Jane Smith	Admin
03	John Doe	Admin
04	Jane Smith	Admin
05	John Doe	Admin

Save Cancel

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**Tips for Managing Parties**

**Dashboard**

Please Select an Option to search for:

Alerts

Case Found

Correspondence

Correspondence Type	Case #	Case Date
Initiation of Proceedings Petition	0000	8/2/2016
Response Petition of Service	0000	8/2/2016
Petition Check Letter	0000	8/2/2016
Petition Check Letter	0000	8/2/2016
Petition Check Letter	0000	8/2/2016

My Claims

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**Tips for Managing Parties**

Option #2:

- If secondary attorneys only need to be able to **access the matter** in WCAIS:
  - The law firm admin or the attorney of record can share the attorney of record's matters with another attorney.

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**Tips for Managing Parties**

**Dashboard**

- Manage My Matters
- Request for Entry of Appearance
- Manage Access of Law Firm User
- Multiple Request for Entry of Appearance
- Withdrawal of Appearance

**List of Matters for ESQ., JOHN**

**Primary Matters**

Select All	Claim #	Claimant/Employer Name	Defendant's/Employer Name
<input checked="" type="checkbox"/>		SMITH	ASSOC
<input checked="" type="checkbox"/>		ROBERTS	PLASTIC

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**Tips for Managing Parties**

**Manage Matter Access**

**Warning:** You are managing access to multiple matters of the Attorney. Individuals that are not selected will lose access to all selected matters and individuals that are selected below will be granted access to all selected matters.

**Attorneys**

**Attorneys Associated to O'HAGAN LLC**

Select All	Name	Pennsylvania Attorney ID
<input type="checkbox"/>	ESQ. KEVIN	56476
<input type="checkbox"/>	DAVID	307344
<input type="checkbox"/>	ESQ.	87613

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**Tips for Managing Parties**

**Option #3:**

- If secondary attorneys only need to be able to **receive correspondence**:
  - The WCOA field office can manually add the attorneys as associated recipients.
  - Attorneys are automatically entered as associated recipients when a new attorney enters their appearance.
  - Attorneys can withdraw their appearance at any time *when they are listed as Associated Recipients*.

**Dashboard**

- Manage My Matters
- Request for Entry of Appearance
- Manage Access of Law Firm User
- Multiple Request for Entry of Appearance
- Withdrawal of Appearance

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Withdrawal of Appearance

## Withdrawal of Appearance



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Withdrawal of Appearance

Attorneys can now withdraw their appearance on closed matters or on matters which they are listed as associated recipients.

*\*All withdrawals of appearance for matters in litigation must be done in accordance with the Judges' Rules of Practice and Procedure.\**



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Withdrawal of Appearance

### Withdrawal of Appearance

Select All	Claim Number A	Claimant/Employer	Defendant/Employer	Date of Injury	Matter Party Type
<input checked="" type="checkbox"/>	#####	Stevens	INC	7/1997	Associated Recipient
<input checked="" type="checkbox"/>	#####	WALTER	Corporation	7/1997	Interested Party
<input type="checkbox"/>	#####	BRITTANY	Corporation	7/1990	Interested Party
<input checked="" type="checkbox"/>	#####	JOSEPH	Corporation	7/1990	Interested Party
<input type="checkbox"/>	#####	CARLE	Corporation	7/1993	Interested Party

1 2 3 4 5 6 7 8 9

Cancel Save and Continue

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**Withdrawal of Appearance**

Withdrawal of Appearance

To submit a withdrawal, please select a claim. [Select Claim](#)

Claim Number	Claimant/Employer	Defendant/Employer	Date of Injury	Matter Party Type
#####	. Stevens	. INC.	/1987	Associated Recipient
#####	. WALTER	Corporation	/1997	Interested Party
#####	. JOSEPH	Corporation	/1995	Interested Party

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

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**Withdrawal of Appearance**

**Confirmation**

Your Withdrawal of Appearance Request has been processed successfully for claims:

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For further details, please call our Claims Information Helpline toll free inside Pennsylvania at 1-800-482-2383, or 717-772-4447 locally or outside of Pennsylvania.

[Return to Dashboard](#)

**Confirmation**

Your Withdrawal of Appearance Request has been denied for claims:

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An open dispute has been identified for this claim. Any withdrawal of appearance must be made in conformity with 34 Pa. Code § 131.58a of the Special Rules of Administrative Practice and Procedure Before Workers' Compensation Judges. To make a request to withdraw an appearance before a Judge, please submit a Miscellaneous request from the Requests tab of the Dispute Summary.

For further details, please call our Claims Information Helpline toll free inside Pennsylvania at 1-800-482-2383, or 717-772-4447 locally or outside of Pennsylvania.

[Return to Dashboard](#)

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**Judge Questionnaire**

<http://www.dli.pa.gov/Individuals/Workers-Compensation/wcoa/judge/Pages/default.aspx>

- [www.DLI.pa.gov](http://www.DLI.pa.gov)
- Individuals: Workers' Compensation Services
- Workers' Compensation Office of Adjudication
- Judge Information



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**WCOA Resource Center**

**WCOA RESOURCE CENTER**  
One stop shop for all of your WCOA related WCAIS needs!


Contact the WCOA Resource Center if you...

- Have general adjudication questions
- Need assistance navigating the WCAIS system
- Want to report system defects
- Have an idea to enhance the system
- Need help with any WCOA related question

E-mail: [WCOAResourceCenter@pa.gov](mailto:WCOAResourceCenter@pa.gov)

Phone: 1-844-237-6316

Operates 8:00 – 4:30pm Monday-Friday



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**Questions?**

**Questions?**



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