ECOMPBOARD

WCB Portal Instructions

https://portal.wcb.oregon.gov

Table of Contents

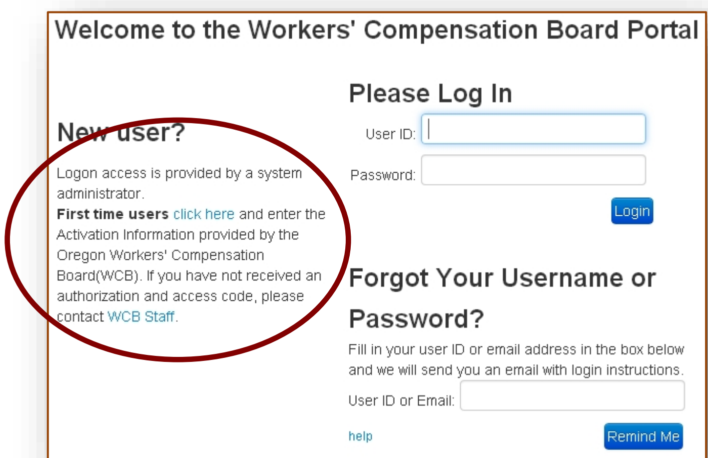
Introduction

- Ecompboard is designed to allow parties to file electronically with the Workers' Compensation Board. Participants in the portal will be able to submit and view data on cases they are a party to.
- Ecompboard will be expanding its services; however, currently Request for Hearing and Request for Review are available for electronic filing. Also, you can sign up to receive CDA approval notifications through the portal, and view case status. As more services are added, parties that belong to the portal will be notified and administrators of accounts will be able to adjust access for their staff members accordingly.
- Once the portal is fully established, it will allow users an alternative way to send and receive electronic transmissions, check case status, and update information.

Accessing Your Account

Establishing System Access

A logon and password will be needed for access to the portal. Attorneys, insurers, and Third Party Administrators will only have access to their own company account; these entities will need to choose a System Administrator for their company.

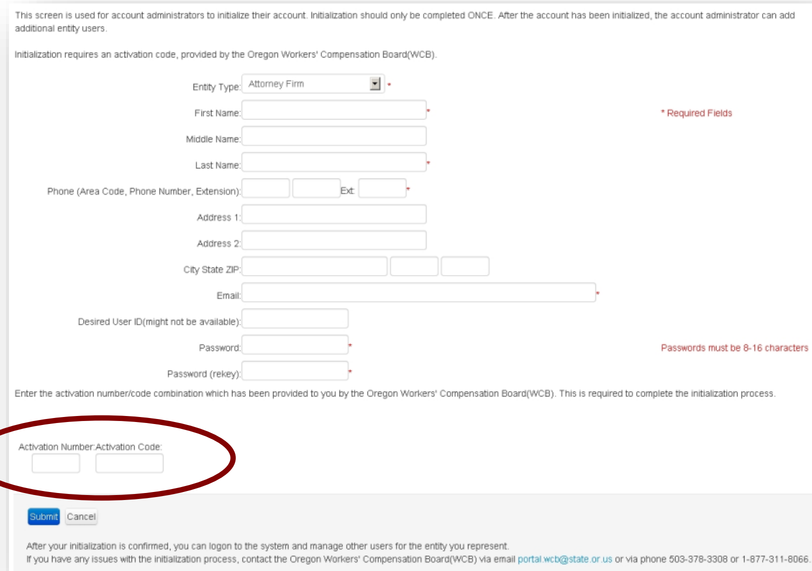


Participants will be sent a notification letter with an Authorization Code that is tied to their company. When the System Administrator wants to create an account for your entity, they will need the authorization code to enter in the New User section.

Once the System Administrator completes the registration process, they will have a User ID and password for subsequent access.

The initialization process can only be done once; if an attempt to initialize the company occurs after it has already been completed, the user will be advised to contact the current System Administrator to obtain access. The System Administrator may add access to their account for as many users as they wish.

To Start the Initialization Process:



- Press the click here link in the New User section. This will route you to the Initialization screen.
- Complete the screen with your System Administrator log-on information.

Passwords are <u>case sensitive</u>. Make sure to take careful note of the case of the password. A password may contain letters and/or numbers. The user is asked to re-key the password to make sure there have been no typographical errors.

- In the lower section, you will be asked to enter the Activation Number and Code. You must enter the number that was assigned to your company in the notification letter. If you cannot find the letter or you need to have a number assigned, please contact us at portal.wcb@state.or.us or call us at 503-378-3308.

If the Activation Number or Code has been previously processed, you will receive an error message like:

If you belong to the company listed in the error message, you will need to contact your System Administrator (listed at the end of the error message) to have them add you as a user to the account.

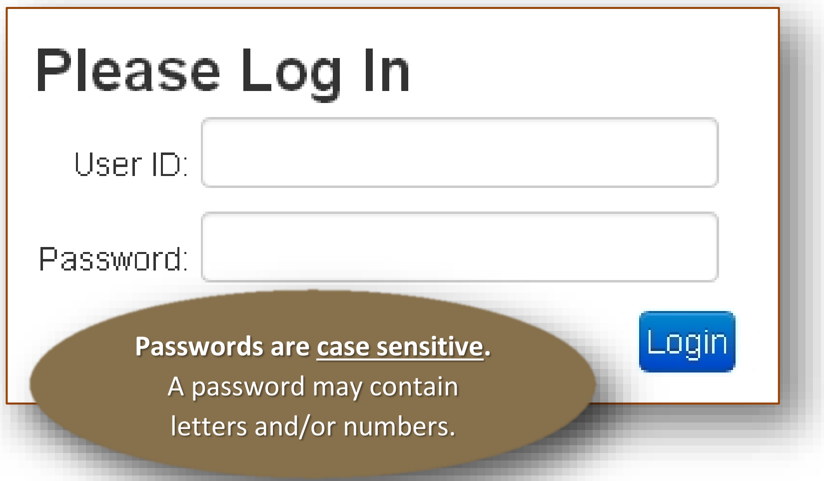
When the system accepts the Activation Number and Code, the log-on will be successfully processed. You will be returned to the login screen with your newly assigned user ID displayed, and an email will be sent confirming your account information. ***Make a note of the log-on ID. It may not be the same log-on ID you requested when setting up your account. This log-on ID will never change and it is <u>not</u> case sensitive; however, please remember that your password you selected <u>is case sensitive</u>.**

Please Note: You may not receive the User ID you requested when initializing your account; another user may have already registered the User ID or the system may have generated a logical User ID based on the information inputted. System User IDs are constructed by combining the first initial of the first name with the first seven characters of the last name. In the case of duplicates, a numeric qualifier will be added.

Please log in to verify that your access is working correctly.

Logging On

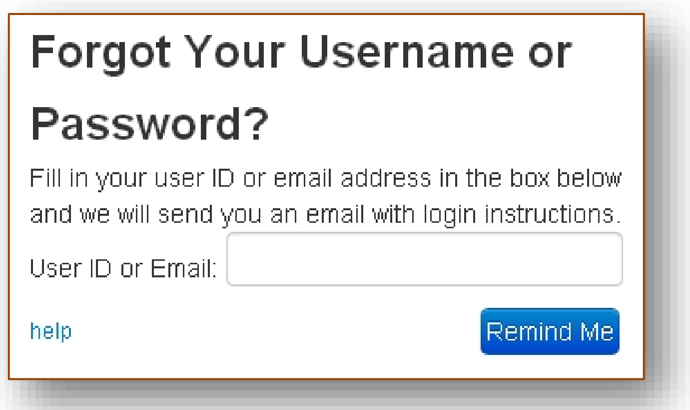
When presented with the login screen, enter your User ID and password.



System Administrators who set up the account will have a personalized password, which they provided at the initial time of registration.

New users added by your System Administrator will need to set up their own password. A link will be emailed to the new user when the System Administrator sets up the access to their account. By pressing the link in the email, the user will be taken to the password screen to setup their personalized password.

User ID & Password

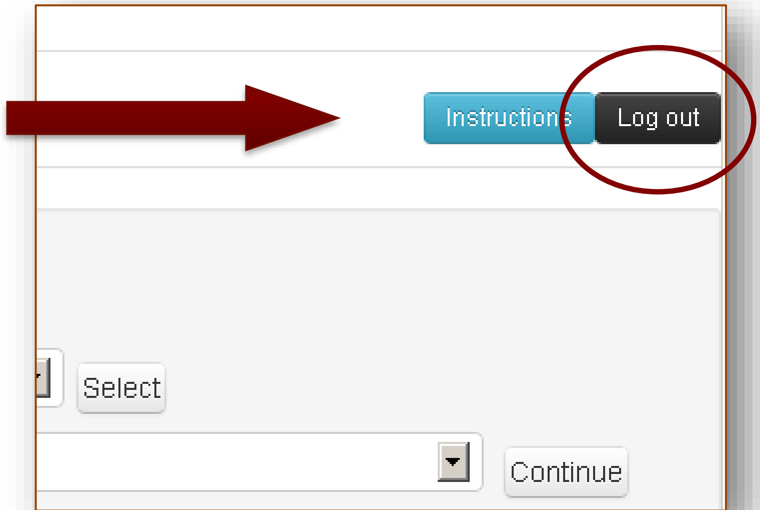


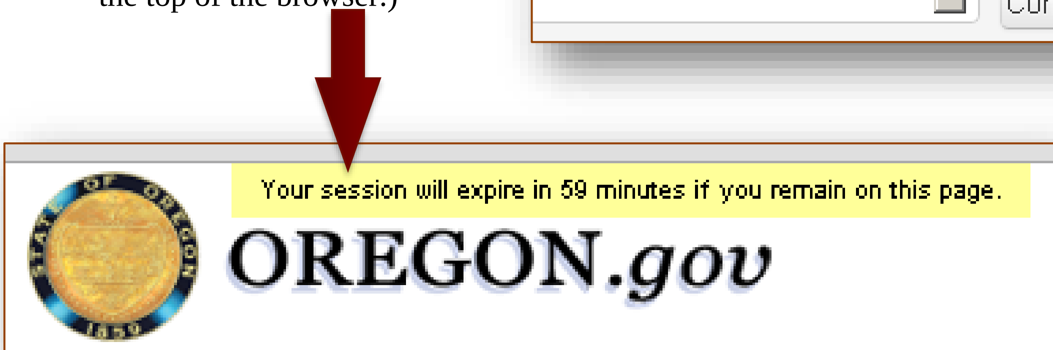
<u>Forgotten User IDs and Passwords</u>

- If you have forgotten your User ID and/or password, you may enter your email address and, if the system finds your email address associated with an account, you will be emailed your User ID and a link to reestablish a new password.
- Users can reset their own passwords at any time after logging in, and are encouraged to do so at least every three months. (*See* Change Your Password)
- Users with administrative rights may reset passwords for any user associated with their company. See instructions under Administrator Password Reset section.

Logging Out/System Inactivity

- You can log out from any tab in the portal by pressing the "log out" link located on the right side of the screen near the top of the page.
- Users are encouraged to log out when leaving their workstation.
- The system will automatically log you out after 60 minutes of inactivity. (Displays near the top of the browser.)

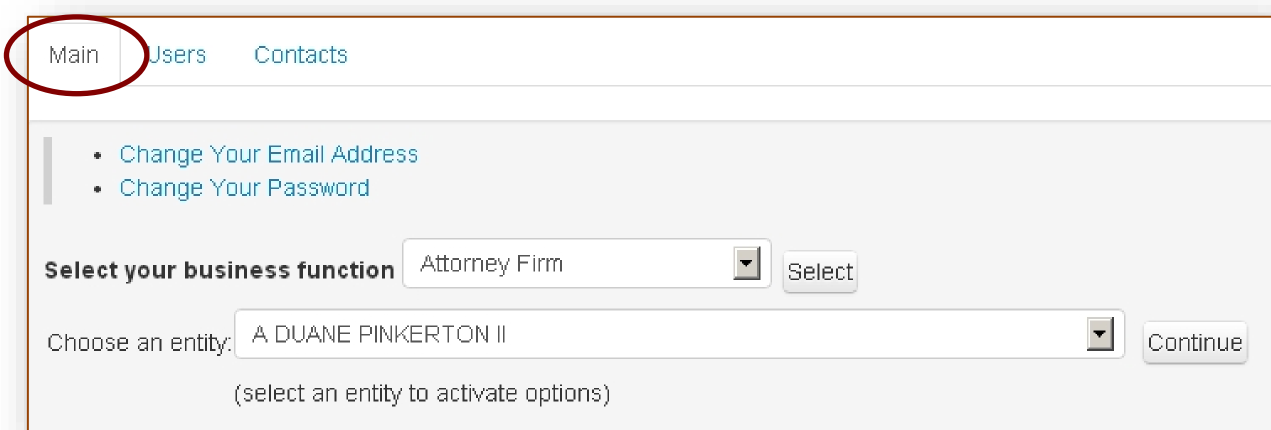




Home Tab

Main Tab

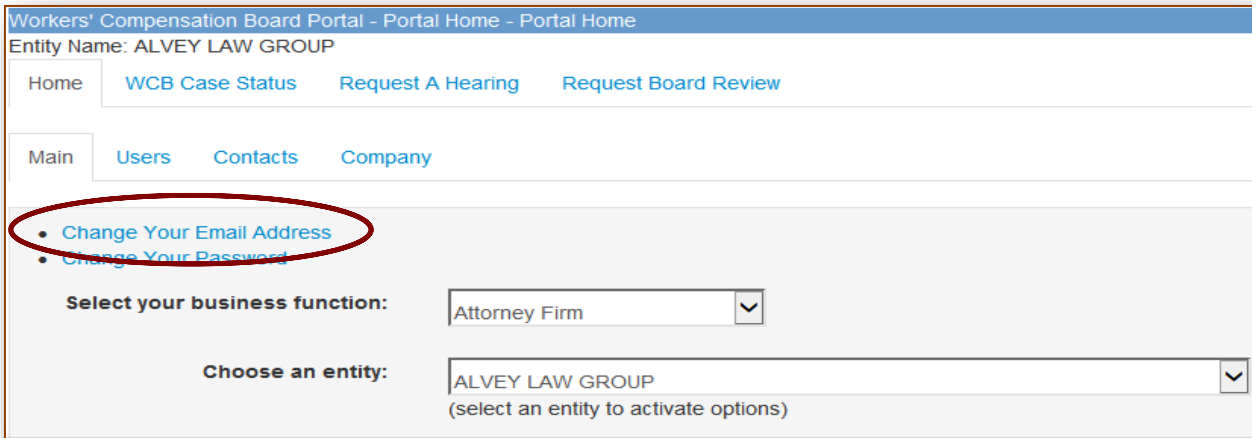
- All users have access to the Main tab, which identifies the entity you are doing business on behalf of and allows you to change your email and password associated with your account.



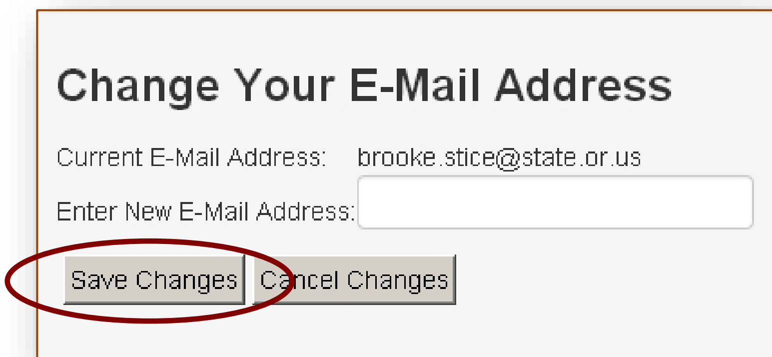
Change Your Email

You can change the email associated with your portal account at any time.

- In the Main Tab, select Change Your E-Mail Address link.

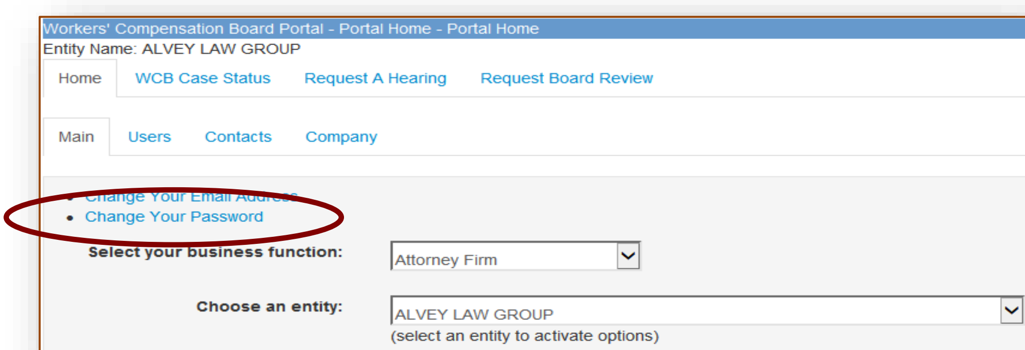


- Then enter your new email address and press Save Changes.

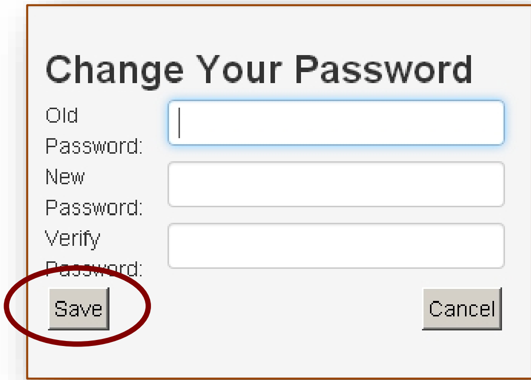


Change Your Password

A user may change their password at any time. After logging in, select Change Your Password from the Main Tab.



- Enter your old password; then enter your new password and press the Save button. The system will send you an email confirming the change in password.



Please note: **Workers' Compensation Board employees do not have access to your password.** They can provide you assistance by resetting the password. You will receive an email with a link; then you can log in and reset the password to your choice.

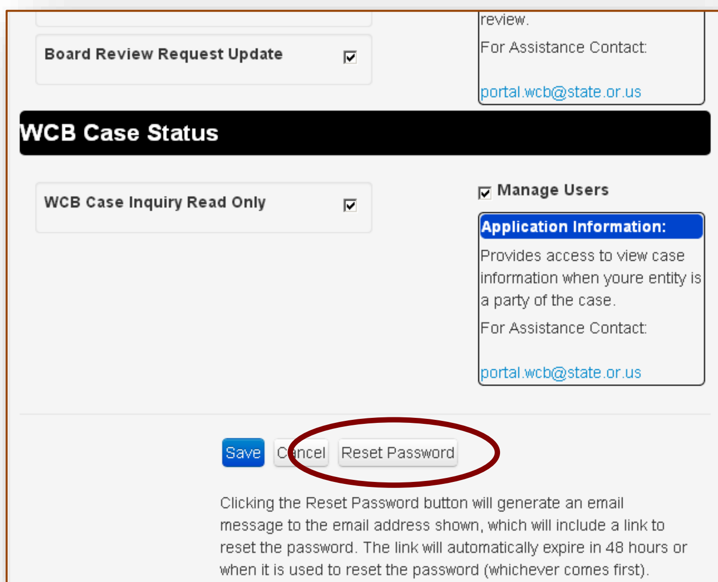
Passwords are <u>case sensitive</u>.
A password may contain letters and/or numbers.

Administrator Password Reset

Should one of your users forget their password, as a system administrator, you can go to the Home Tab under Users to reset their password. If you pull up the User List and select the appropriate user, then select User Detail.

At the bottom of the User Detail, there is an option to Reset Password. A random password will be generated and an email will be sent to the email address they are using with the portal.

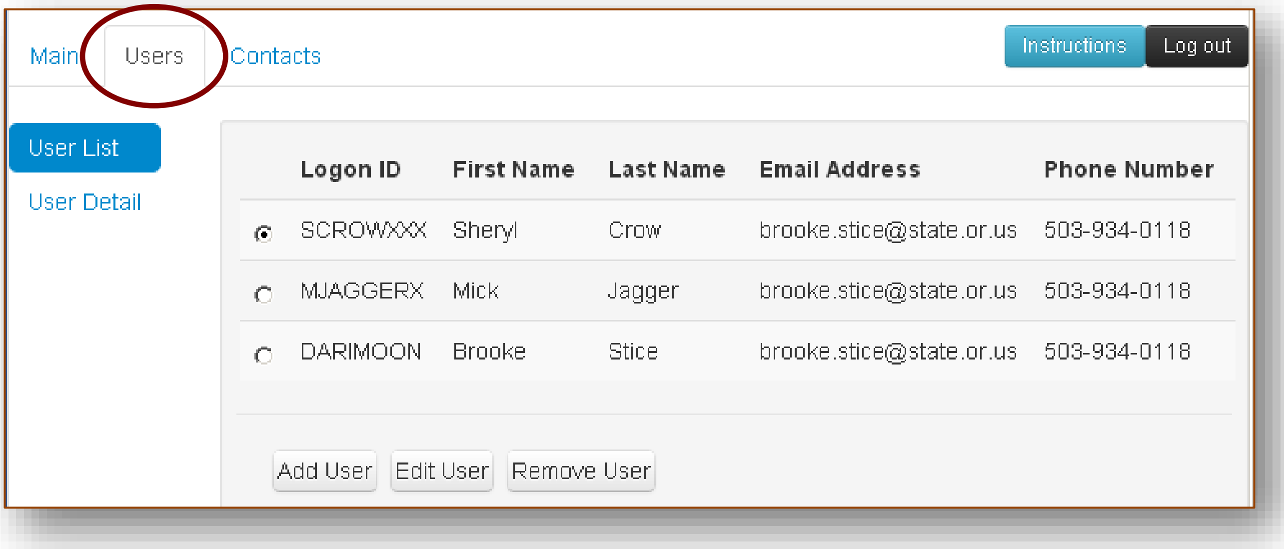
Administrators have all of the rights that are available for the entity. Administrators can: add and change users, add and change contacts, update information, and print available reports.



Users Tab

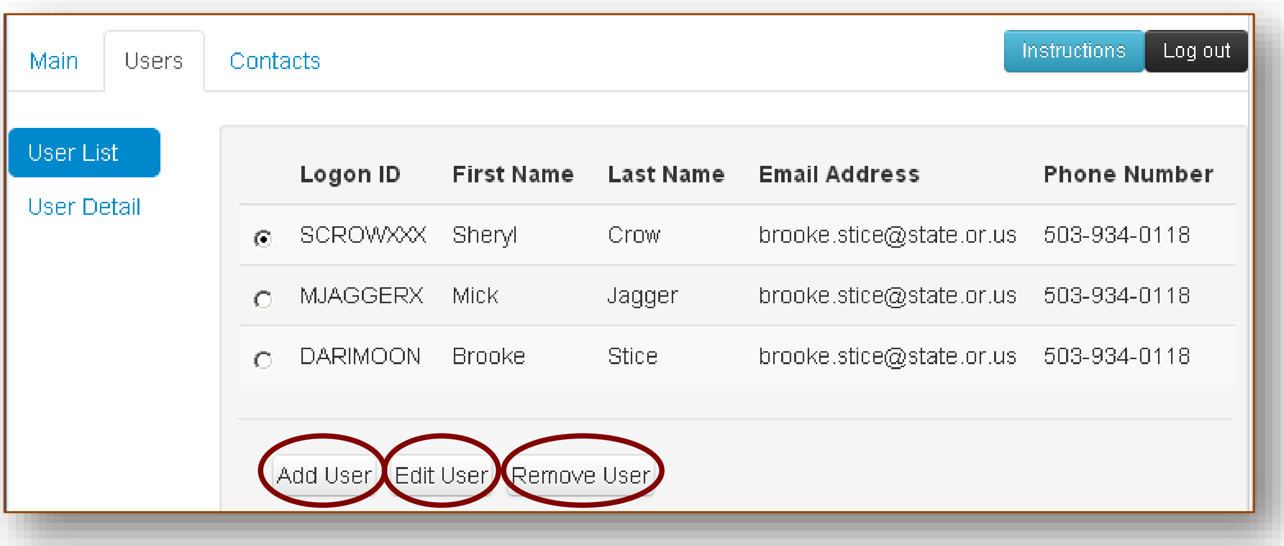
- The Users tab allows you to add or modify users who have access to data for the company. When choosing the Users tab, you have two Menu Items to choose from, User List and User Detail.

- When you select the User tab, it will always default to the User List with the first user selected. The User List displays all users authorized to access information within the company. The first time a System Administrator accesses the User tab, only their name will be listed; they will need to add additional users for the account.
- If you select User Detail, you can then edit the access granted to the specific user selected from the User List.



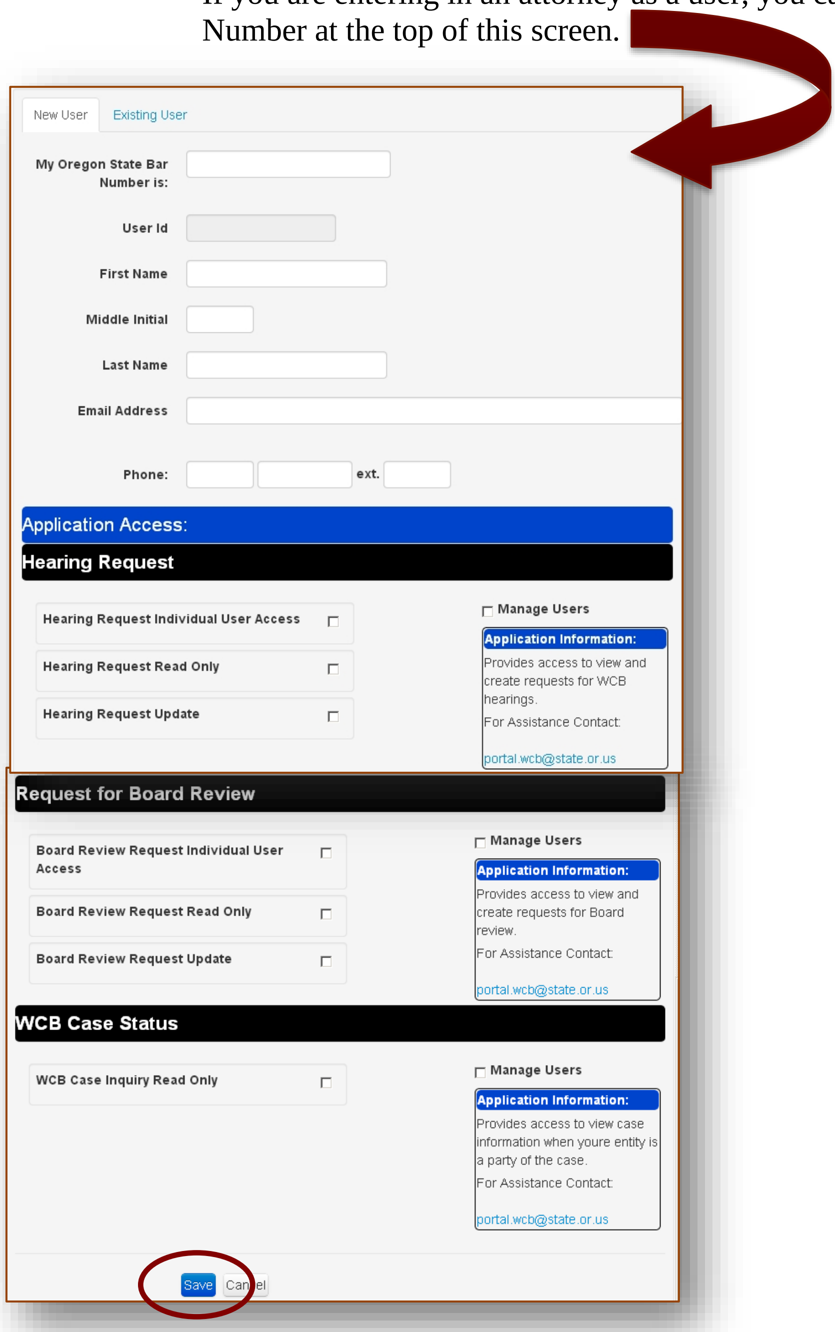
Add/Edit/Remove User

The System Administrator and any designated user given access to the Users Tab may add, edit, or remove users for your entity.

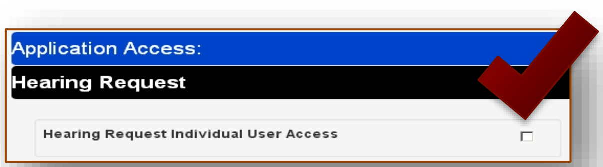


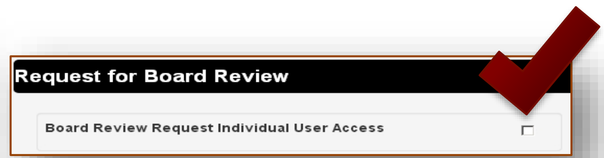
Adding a User

- Click the Add User button. (It will bring you to the User Detail screen.)
- You will need to enter the First Name, Last Name, and Email Address of the user. The User ID will be system-generated.
    - The user will receive an email providing them with their User ID and a link to the system.
    - If you are entering in an attorney as a user, you can enter their Oregon State Bar Number at the top of this screen.

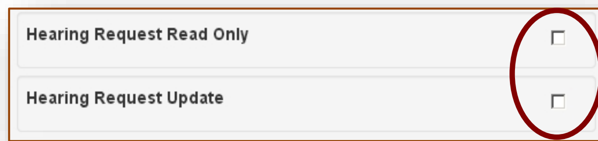


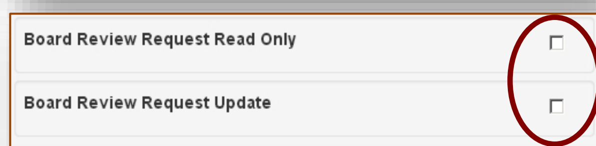
- If the attorney's bar number is entered, when you select your options under "Application Access", you can click the box for Hearing Request Individual User Access and Board Review Request Individual User Access. This will give the attorney access to only cases that they are a party to.

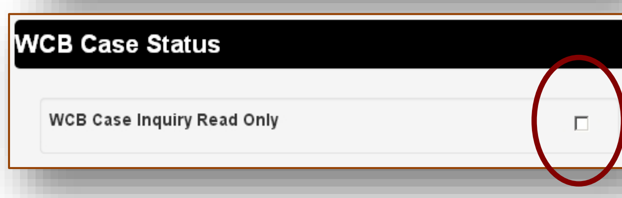


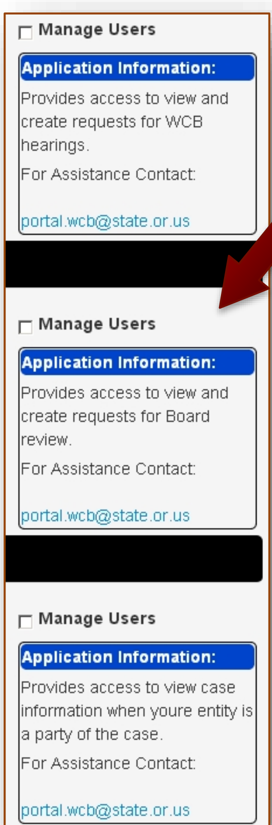


- Application Access for non-attorneys: There are two options Read Only or Update.
    - You should check the box for Read Only if you want to only give the user access to view information, but not modify it.
    - You should check the box for Update if you want the user to be able to modify and update requests in the system.
- Note: WCB Case Status only has the Read Only option.





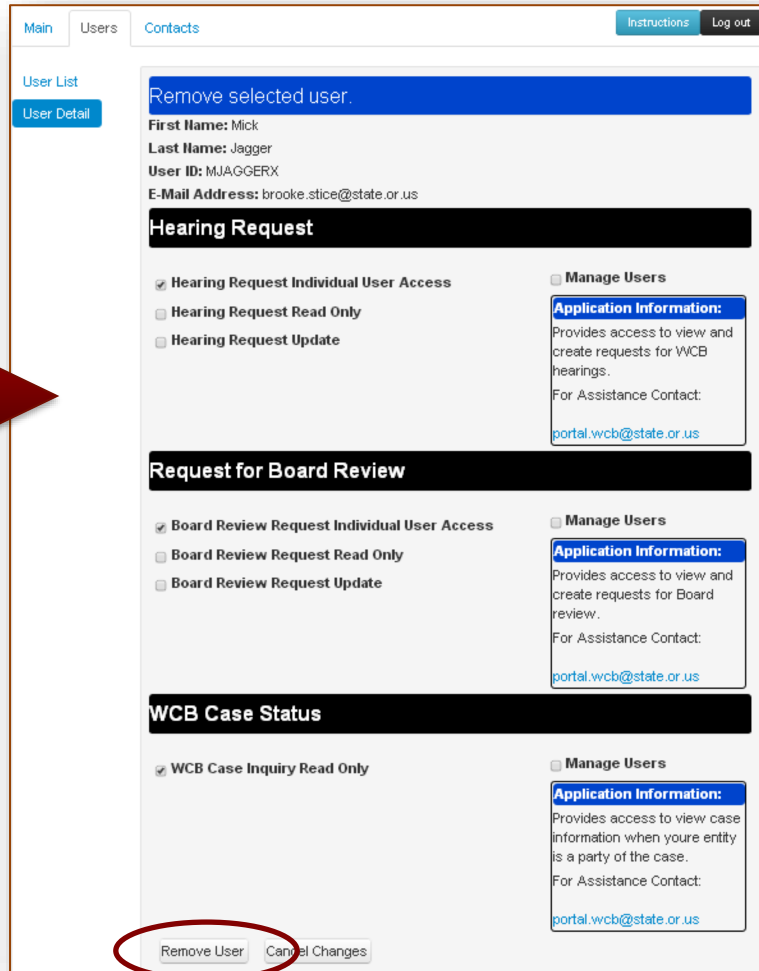




- Manage Users. If you want to give another user "Administrator Access", then check the box for Manage Users.
    - This will allow the user to add, modify, or remove users from your account.
- Press Save to save changes. Data changes on ANY tab must be saved using the Save button. If you make changes and exit the tab, the system will confirm whether you want to abandon the changes that you have made.
- Added users will be able to access the portal immediately.

Editing a User

- Click the Edit User button. (It will also bring you to the User Detail screen.)
- Edit any information that needs updating, i.e., email address, system access, etc.
- Press Save to save changes.

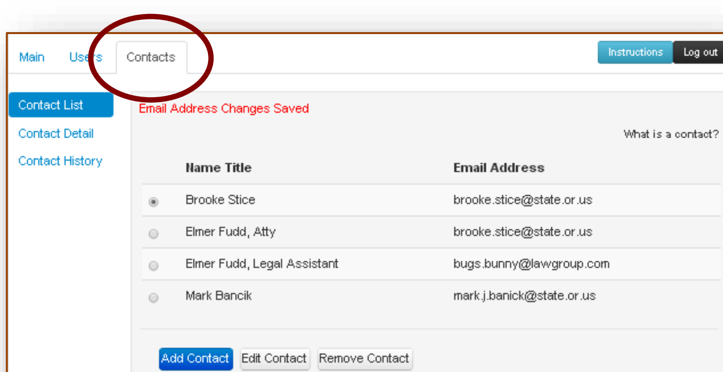


Removing a User

- In the User List, select the user you want to remove.
- Click the Remove User button.
- The screen to the right will pop up:
- Press Remove User to remove the selected user from your entity account.

Contacts Tab

- Contacts represent points of contact within a business. They are not the same as authorized system users, but rather recipients of notifications generated by the system for specific business purposes. You may add as many contacts as you wish. The System Administrator should be a contact.
- Contacts may receive notifications by email. The system automatically generates a wide variety of automated notices. The system keeps a record of all automated notices sent to all Contacts in the system.



- Administrators are encouraged to set themselves up as a contact for administrative activities, such as adding or modifying users.
- If you want to receive notifications to multiple email addresses or specify what notifications you would like sent to what email, Contacts is where you should organize this.

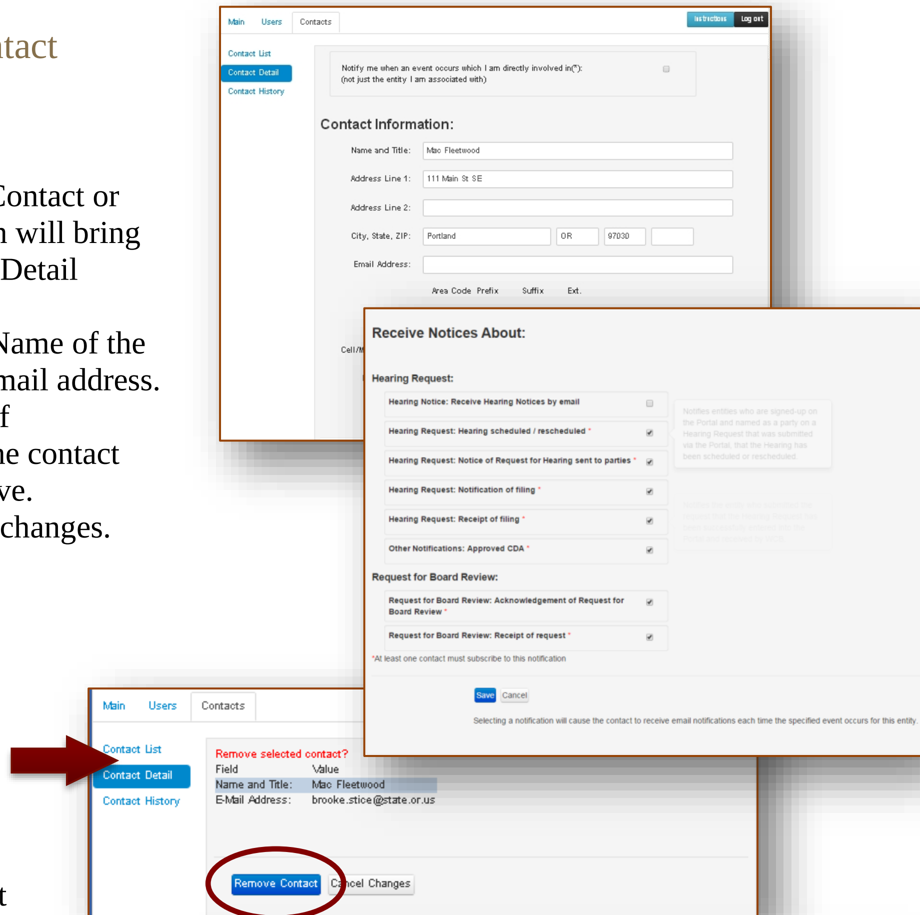
Add/Edit/Remove Contact

Add or Edit Contact:

- Clicking the Add Contact or Edit Contact button will bring you to the Contact Detail screen.
- Enter/Change the Name of the contact and their email address.
- Choose the types of notifications that the contact would like to receive.
- Press Save to save changes.
-

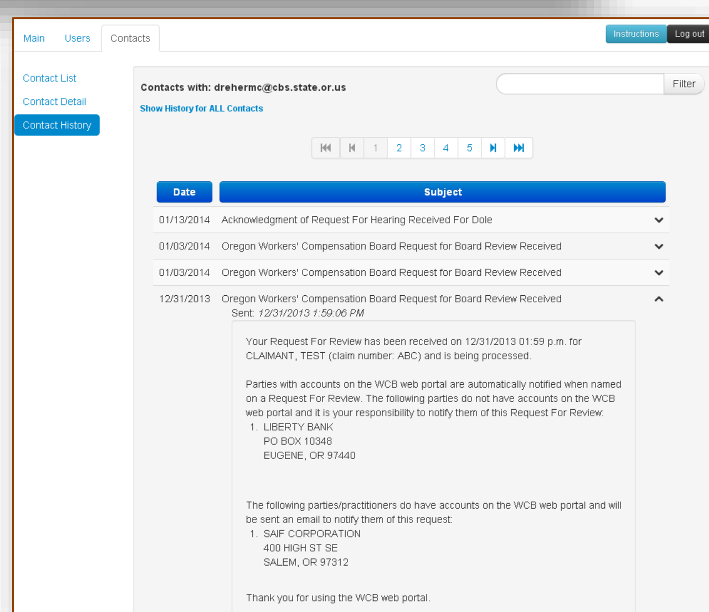
Remove Contact:

- Click the Remove Contact button.
- The screen to the right will pop up:
- Press Remove Contact to remove the selected contact from your entity account.



Contact History

- The Contact History screen will let you view all of the notifications that the selected user has received.

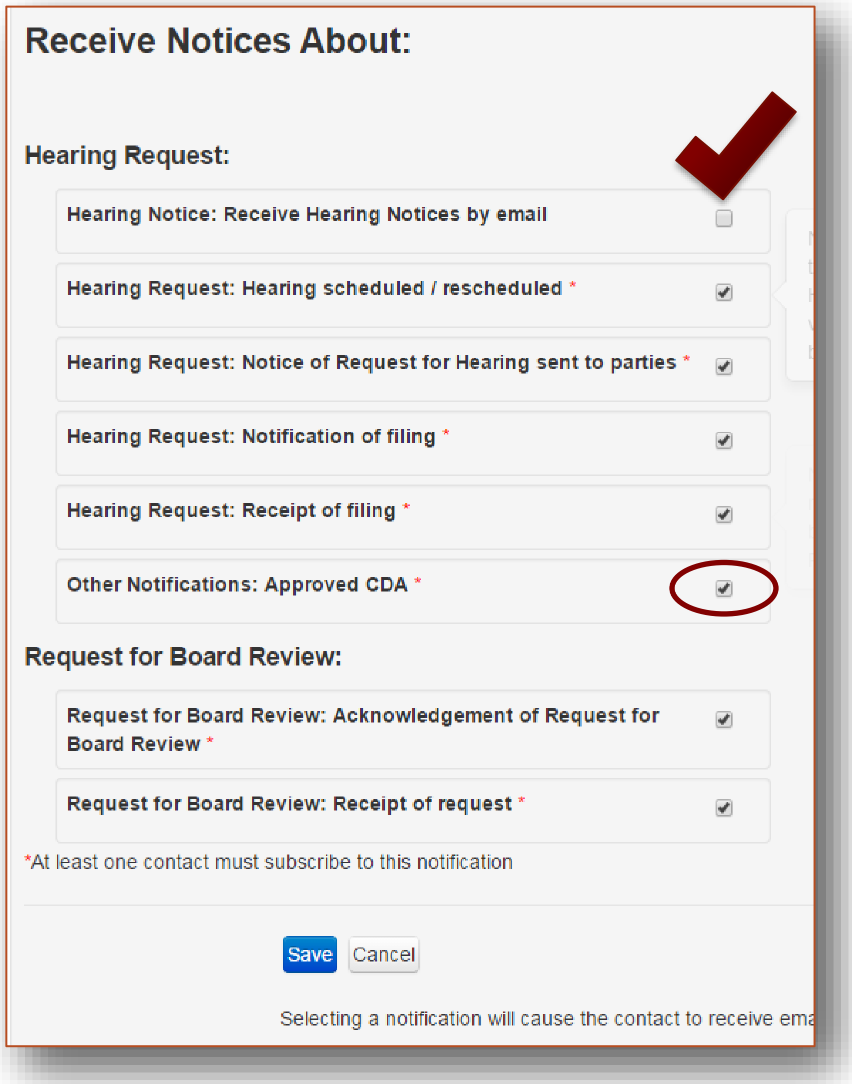


Approved CDAs

If you want to receive notifications for approved CDAs, all you have to do is sign up with the portal. You must add your name to the Contact list with the email address you wish to receive the notifications. You can receive notifications to multiple email addresses; you just need to fill out a new contact for each email address. It is okay if the same name is in the list multiple times.

When a CDA is approved, it will be entered into our system and an email notification will be sent to you if you are a party to the case.

There is no TAB or any other viewing option available in the portal. You just need to check the box that says "Approved CDA" and email notifications will be sent to you.



Hearing Notices

If you want to receive your hearing notice by email from the portal, activate the Hearing Notice by checking the box.

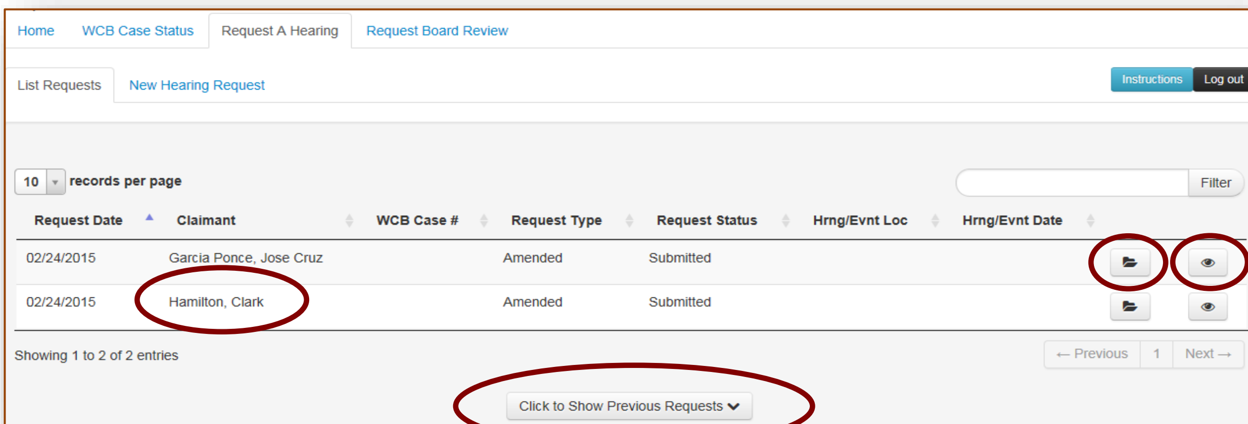
★★Please note that if anyone in your organization activates this notice, you will no longer receive paper notices in the mail.★★

It's advisable to have more than one contact receive this notification.

Requests for Hearing Tab

List Requests Tab

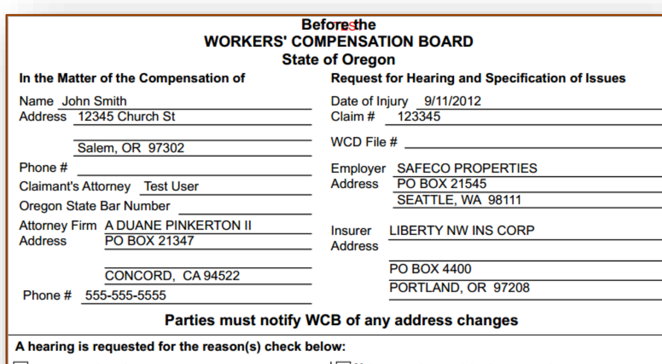
- The top of the List Requests Tab defaults to requests that have not been processed. To see previous requests, click on the button to show previous requests.
- It displays the Request Date, Claimant, WCB Number, Status, Location, and Hearing Date.
- From this tab, you can also select any of the requests and modify, view, or attach additional documentation.
    - If you click on the Claimant's Name, you can file a supplemental, amended, or consolidated Request for Hearing for the Claimant. You can also file an original/new request, but it will have the information prefilled for you, so make sure you make the necessary adjustments.
    - If you click on View Request, it will display the newest Request for Hearing associated with the request.
    - If you click on Additional Docs, you can add additional supporting documentation you did not have at the time you filed the request.



Documentation and View Request

If you click on **View Request**, a document will load that looks exactly like the paper version of the current Request for Hearing.

- You can print, email, or save this document to your computer.



Before the
WORKERS' COMPENSATION BOARD
State of Oregon

In the Matter of the Compensation of

Name John Smith
Address 12345 Church St
Salem, OR 97302
Phone #
Claimant's Attorney Test User
Oregon State Bar Number
Attorney Firm A DUANE PINKERTON II
Address PO BOX 21347
CONCORD, CA 94522
Phone # 555-555-5555

Request for Hearing and Specification of Issues

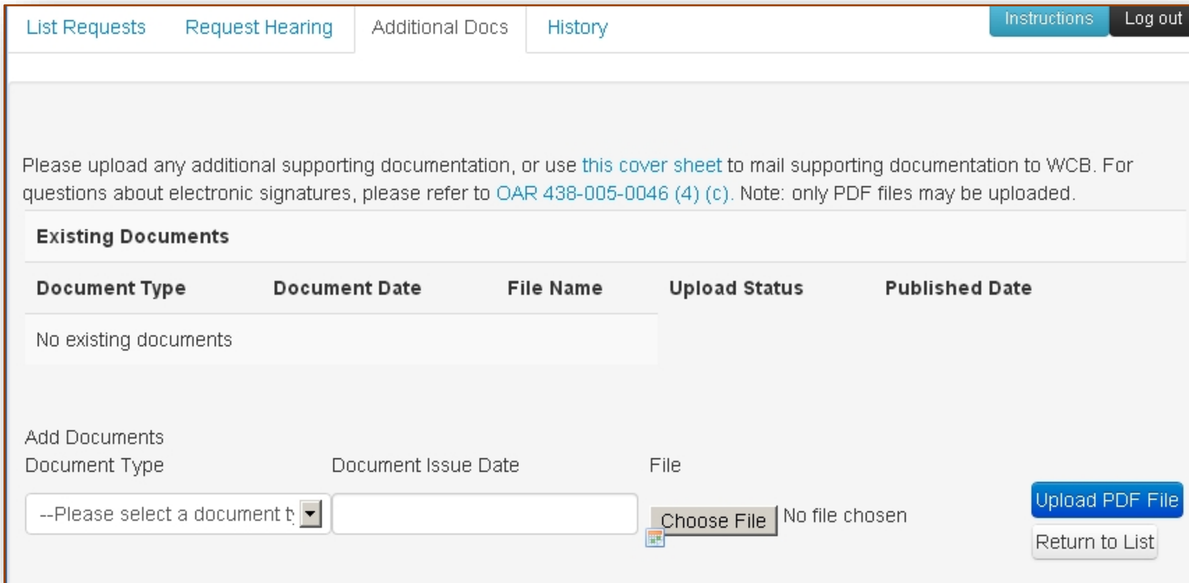
Date of Injury 9/11/2012
Claim # 123345
WCD File #
Employer SAFECO PROPERTIES
Address PO BOX 21545
SEATTLE, WA 98111
Insurer LIBERTY NW INS CORP
Address
PO BOX 4400
PORTLAND, OR 97208

Parties must notify WCB of any address changes

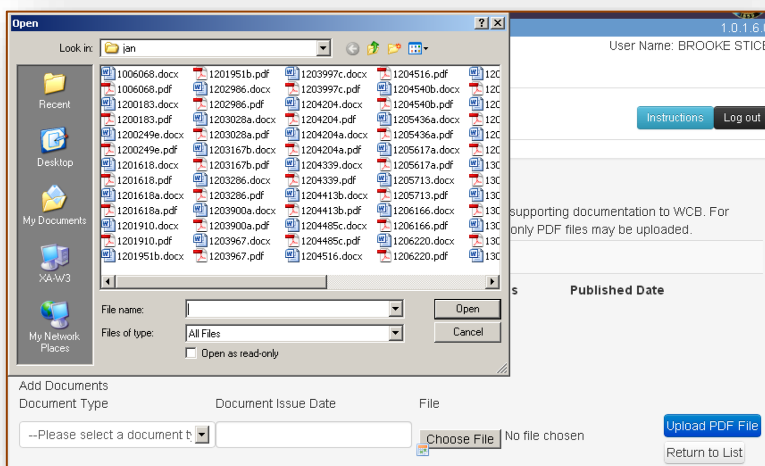
A hearing is requested for the reason(s) check below:
[X] A DENIAL (date)
[X] N ORDER ON RECONSIDERATION attach copy

If you click on **Additional Documentation**, the additional documentation screen will popup, just like when you first submitted your Request for Hearing.

- Choose the document type from he drop-down menu and the date the document was issued.
- Click the Choose File… button to search for the document you wish to upload.

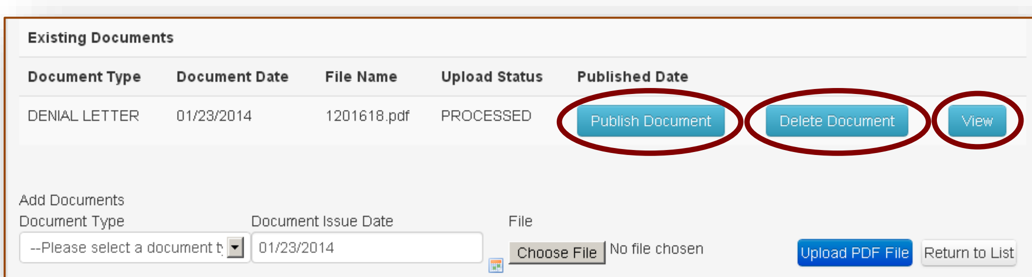


- You can browse through the files on your computer until you find the necessary documentation to upload. Once you've selected the document and pressed open, it will appear in the portal screen. Press **Upload File** to upload the document to the WCB portal.



- At this point you can review the document.

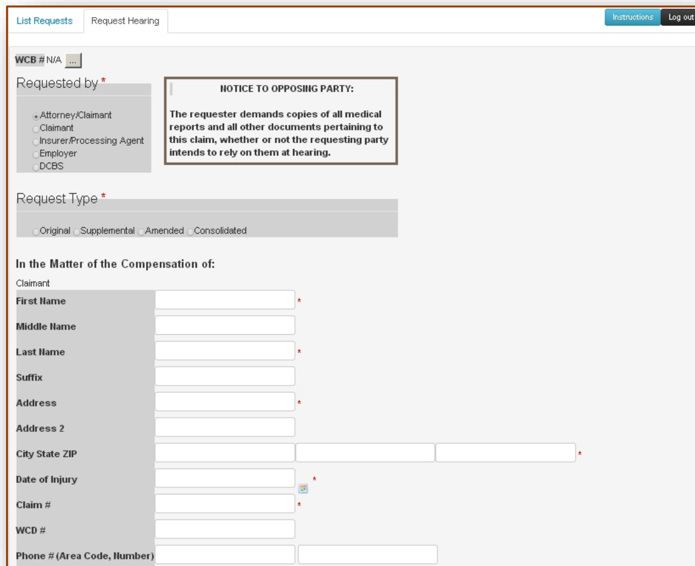
To complete the upload process press Publish Document or you can delete the document.

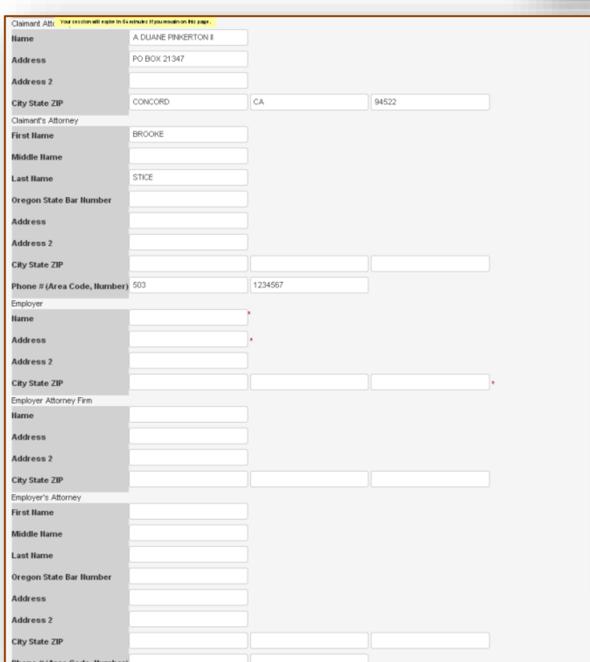


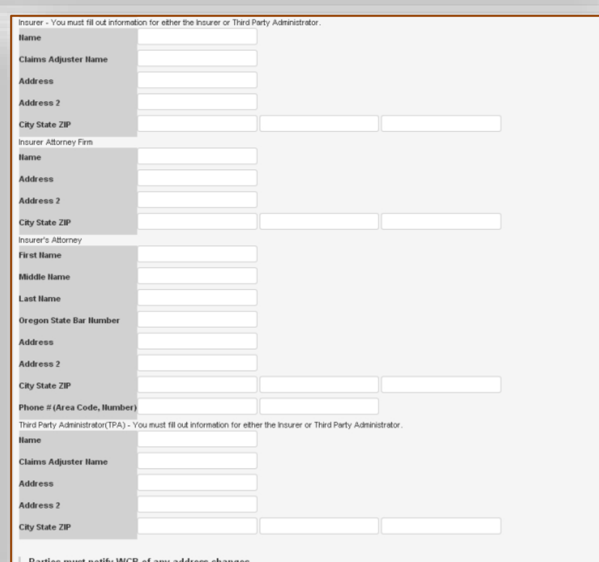
Request for Hearing Tab

You can request a hearing by hitting the Request for Hearing Tab. It will bring up a form to fill out that is very similar to the current paper form. It looks like this:

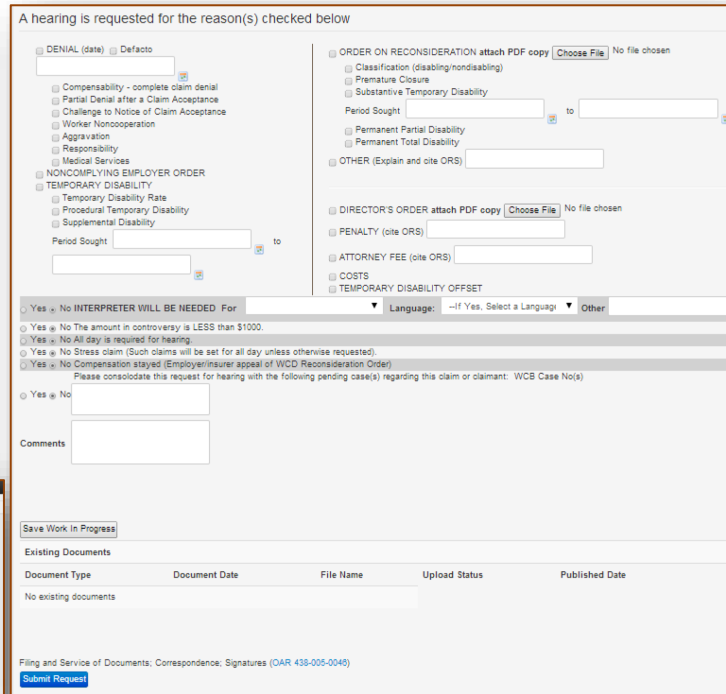
- The Requested By field should be marked automatically to your entity type you signed up with for your portal account. This should auto-populate your information into the corresponding section.
- Choose the Request Type.
- Enter Claimant information.
- For the "Name" fields for Attorney Firm, Employer, Insurer Firm, or Third Party Administrator, you can start typing the name of the company and it will retrieve the information from our database. Once you select the correct option, if you TAB to the next field, it will populate the fields below it. (If the option you need is not available, you can still type into the fields.)

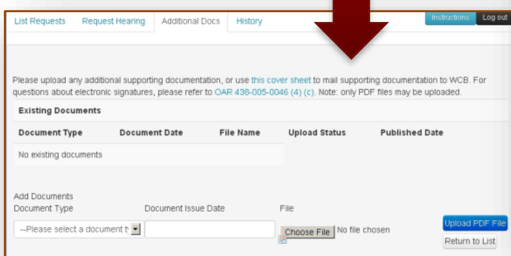






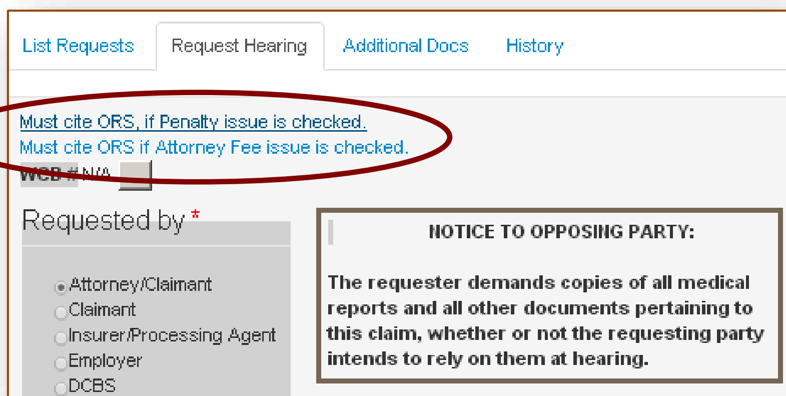
- Select the appropriate issues, provide interpreter information, or write comments as needed.
- You will have a chance to attach supporting documentation, such as a retainer agreement, once you press Submit Request. An acknowledgement screen will come up that looks like this:





Click here to proceed to Additional Documents

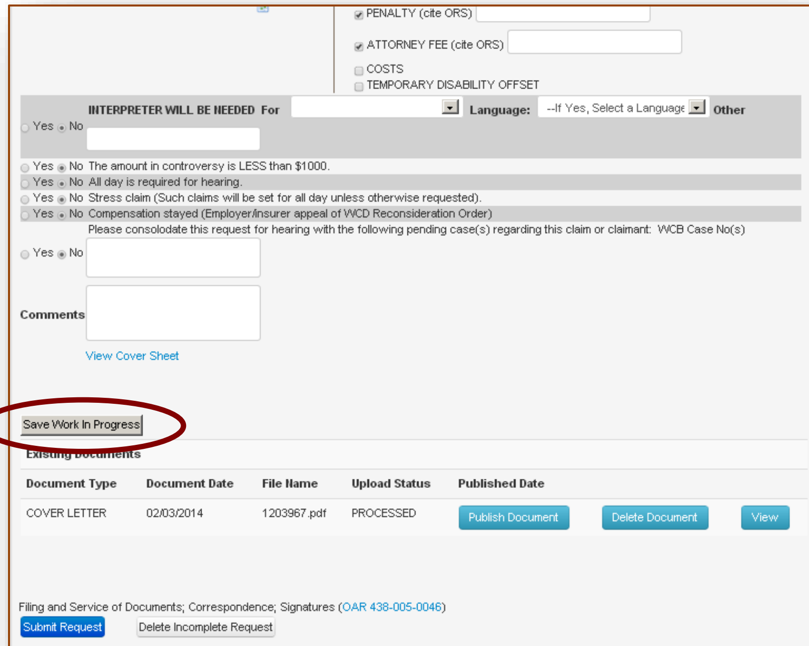
It is possible that you will receive an error code before you can submit your request. Some pertinent information may be missing and in order to complete the Request for Hearing, you will need to fix the errors. The error codes will appear above the "Requested By" box.



***Tip:** Press the blue link to take you directly to the section that is missing the information.

Save Work In Progress

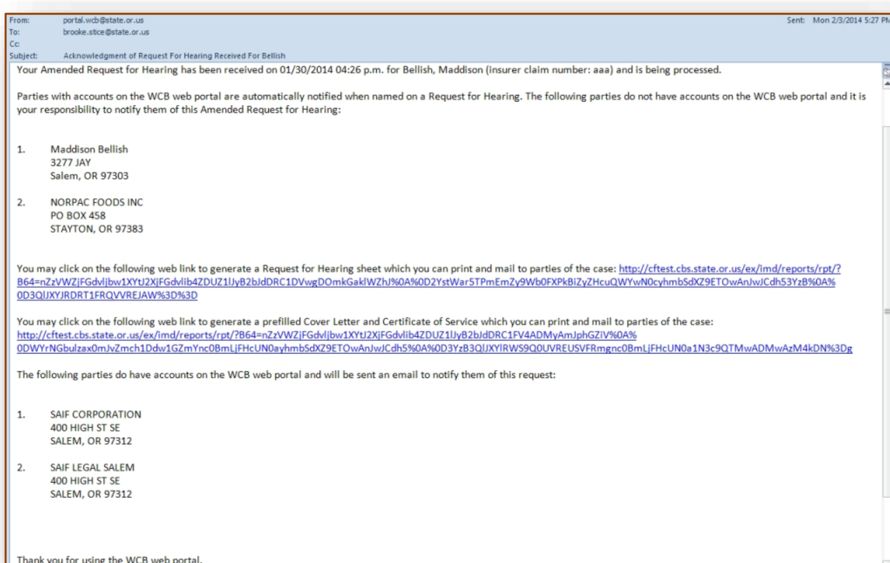
If you are unable to complete the request you are working on for any reason (need to leave your office, take a phone call, 60 minutes is not enough time), there is a **Save Work in Progress** button located near the bottom of the page. Scroll down and press the button to save your progress on your request. You will be able to return to your request at a later time.



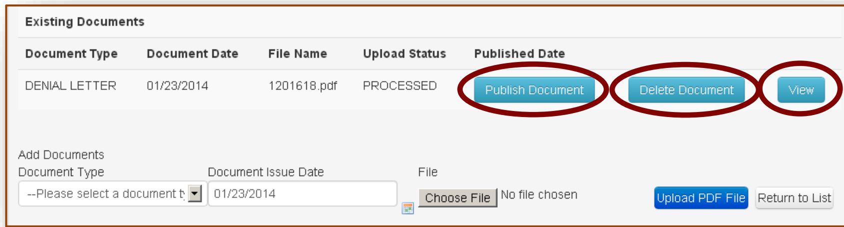
Request for Hearing Acknowledgement

Once you have submitted the Request for Hearing, you will receive an acknowledgement email that looks similar to this:

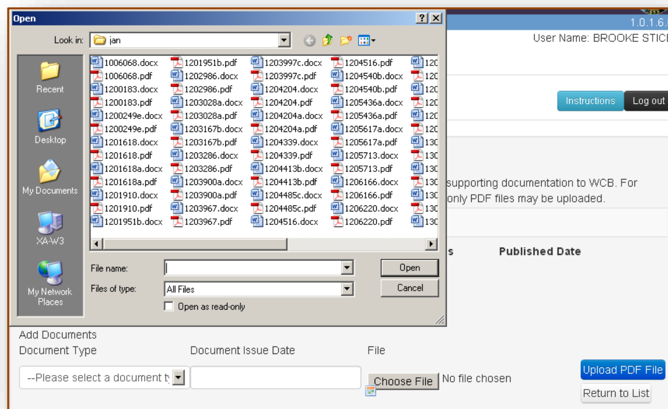
The email will let you know if parties to the case do not have accounts on the WCB portal. If you click on the link provided, you can create a cover sheet to mail or fax to parties with the Request for Hearing.



Additional Documents



- Choose the document type from the drop-down menu and the date the document was issued.
- Click the Choose File… button to search for the document you wish to upload.



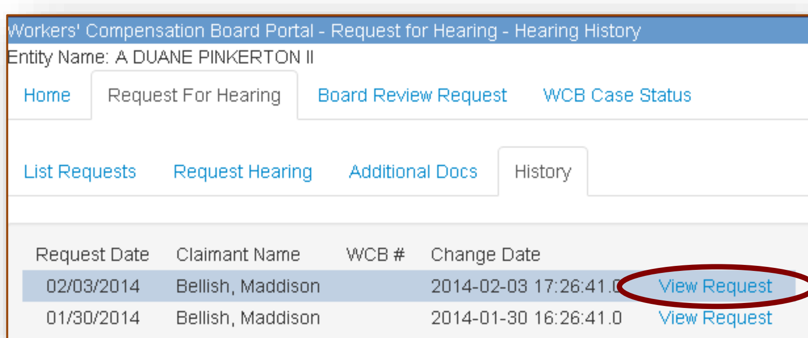
You can browse through the files on your computer until you find the necessary documentation to upload.

Once you've selected the document and pressed open, it will appear in the portal screen. Press **Upload File** to upload the document to the WCB portal.

At this point you can review the document. To complete the upload process press Publish Document or you can delete the document.

History

This History Tab will show you the history related to the Request for Hearing that you are viewing. For example:

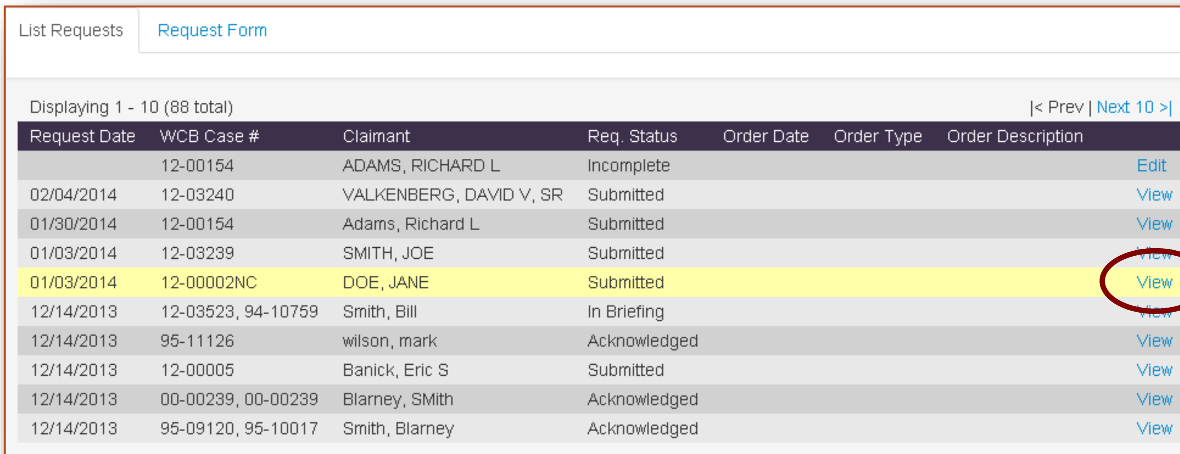


The history in this example shows that for this Request for Hearing for Claimant "Maddison Bellish" there were two requests submitted. If you click the **View Request** link, you will be able to pull up the original request and compare it with the amended request to see what information changed.

Board Review Request Tab

List Requests Tab

- The List Requests Tab displays all of the Board Review Requests that have been submitted by your entity.
- It displays the Request Date, WCB Number, Claimant, Order Date, and whether it's a Cross Request.
- From this tab view the request submitted by clicking on the View link.

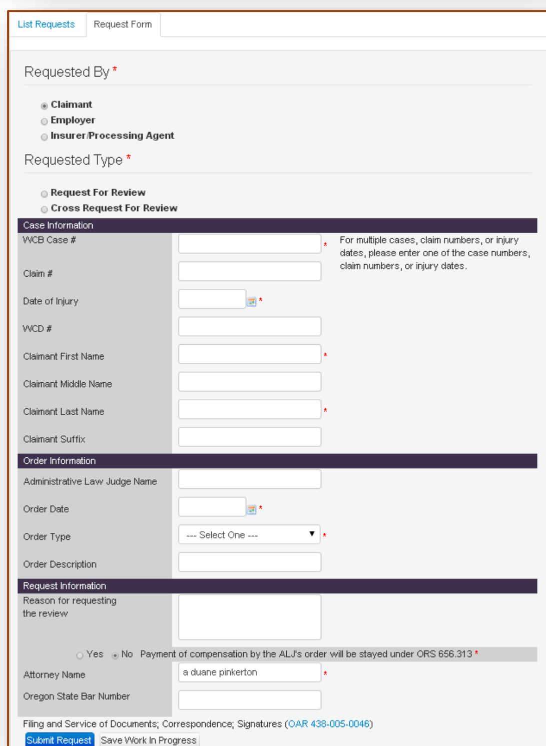


Request Date	WCB Case #	Claimant	Req. Status	Order Date	Order Type	Order Description	
	12-00154	ADAMS, RICHARD L	Incomplete				Edit
02/04/2014	12-03240	VALKENBERG, DAVID V, SR	Submitted				View
01/30/2014	12-00154	Adams, Richard L	Submitted				View
01/03/2014	12-03239	SMITH, JOE	Submitted				View
01/03/2014	12-00002NC	DOE, JANE	Submitted				View
12/14/2013	12-03523, 94-10759	Smith, Bill	In Briefing				View
12/14/2013	95-11126	wilson, mark	Acknowledged				View
12/14/2013	12-00005	Banick, Eric S	Submitted				View
12/14/2013	00-00239, 00-00239	Blarney, SMith	Acknowledged				View
12/14/2013	95-09120, 95-10017	Smith, Blarney	Acknowledged				View

Request Form Tab

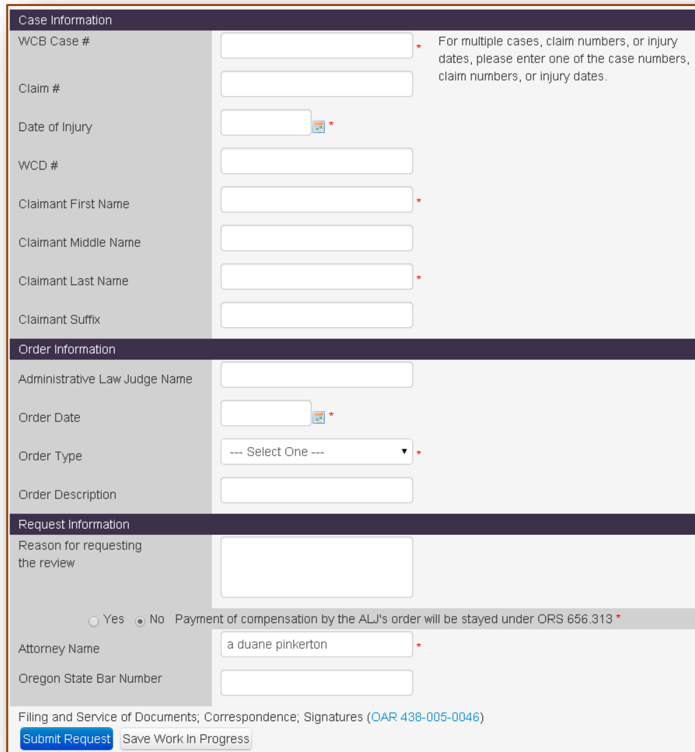
You can request Board Review by clicking on the Request Form tab. It will bring up a form to fill out.

- The Requested By field should be marked automatically to your entity type you signed up with for your portal account.
- Choose the Requested Type.
- Start typing the WCB Case #.
    - This will bring up a list of WCB #'s that you have been listed as a party on.
    - If you select the appropriate WCB #, it should then fill in the other info for you automatically.
- If the WCB # is not listed, you can still fill in the data manually.



The required information that must be entered is the WCB Case #, Date of Injury, Claimant First Name, and Claimant Last Name.

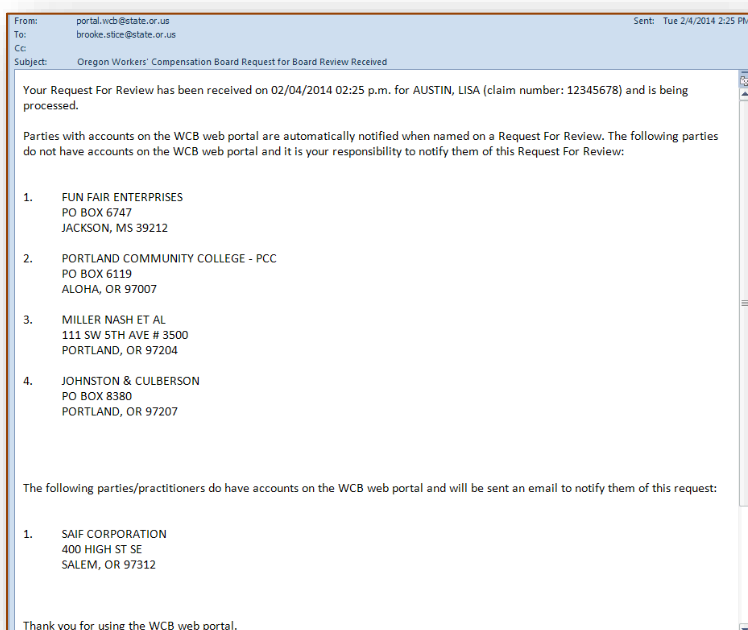
- You must also list the Order you are request review on and the date of that Order.
- There is a section to share your reason for requesting review.
- If you are unable to finish your request, there is a Save Work in Progress button located at the bottom of the form.
    - You can save the request you are working on. It will then be listed under the List Requests tab with an Incomplete status, so you can finish it at a later time.
- If you are ready to submit your request, you can click on the Submit Request button at the bottom of the form.



Request for Board Review Acknowledgement

Once you have submitted the Request for Board Review, you will receive an acknowledgement email that looks similar to this:

The email will let you know if parties to the case do not have accounts on the WCB portal.



From: portal.wcb@state.or.us
Sent: Tue 2/4/2014 2:25 PM
To: brooke.stice@state.or.us
Cc:
Subject: Oregon Workers' Compensation Board Request for Board Review Received

Your Request For Review has been received on 02/04/2014 02:25 p.m. for AUSTIN, LISA (claim number: 12345678) and is being processed.

Parties with accounts on the WCB web portal are automatically notified when named on a Request For Review. The following parties do not have accounts on the WCB web portal and it is your responsibility to notify them of this Request For Review:

1. FUN FAIR ENTERPRISES
PO BOX 6747
JACKSON, MS 39212

2. PORTLAND COMMUNITY COLLEGE - PCC
PO BOX 6119
ALOHA, OR 97007

3. MILLER NASH ET AL
111 SW 5TH AVE # 3500
PORTLAND, OR 97204

4. JOHNSTON & CULBERSON
PO BOX 8380
PORTLAND, OR 97207

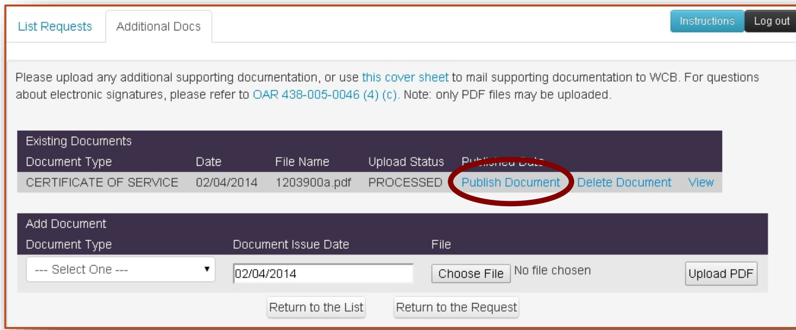
The following parties/practitioners do have accounts on the WCB web portal and will be sent an email to notify them of this request:

1. SAIF CORPORATION
400 HIGH ST SE
SALEM, OR 97312

Thank you for using the WCB web portal.

Additional Documents

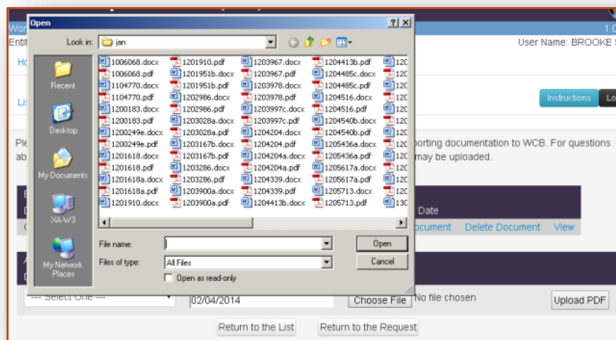
- Choose the document type from the drop-down menu and the date the document was issued.
- Click the Choose File… button to search for the document you wish to upload.



You can browse through the files on your computer until you find the necessary documentation to upload.

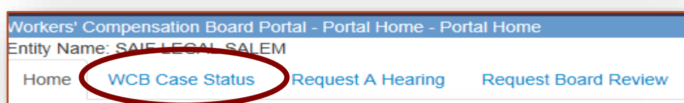
Once you've selected the document and pressed open, it will appear in the portal screen. Press **Upload File** to upload the document to the WCB portal.

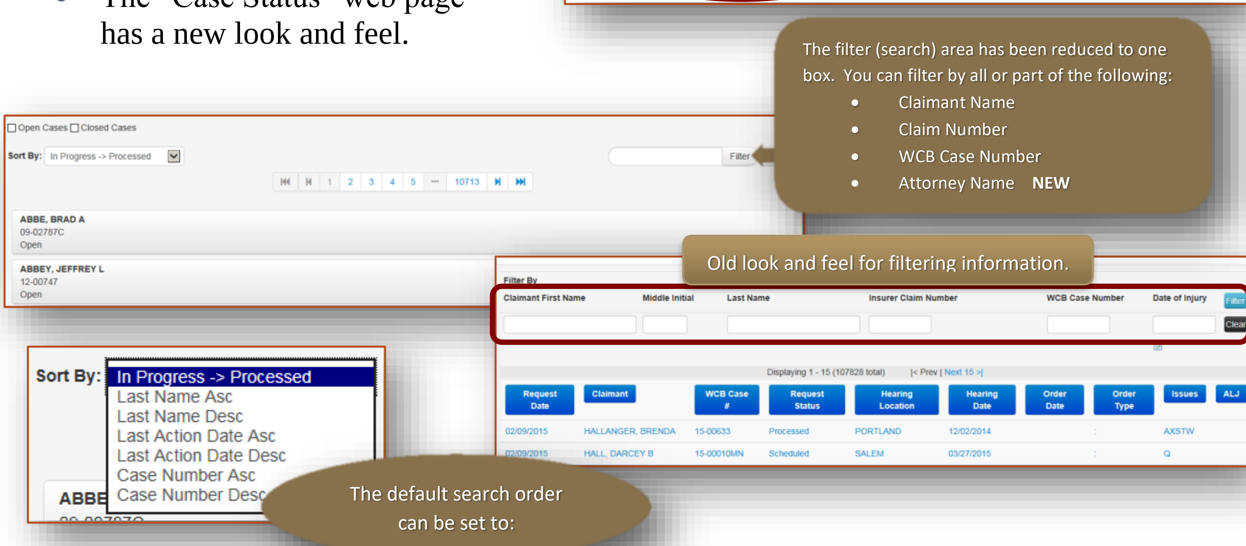
At this point you can review the document. To complete the upload process press Publish Document or you can delete the document.



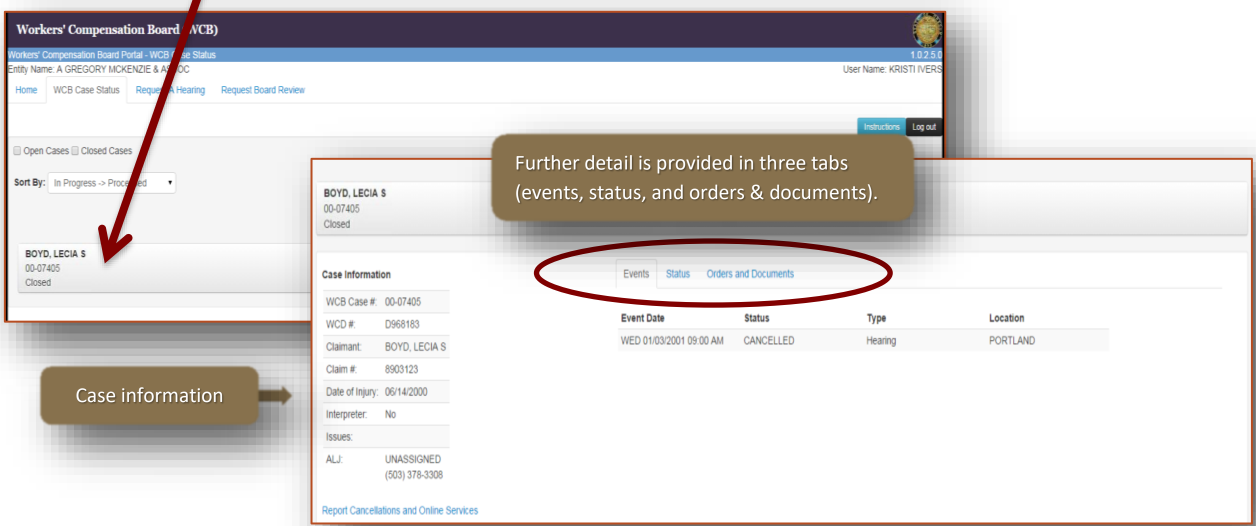
WCB Case Status Tab

- The "Case Status" tab has moved next to the "Home" tab.
- The "Case Status" web page has a new look and feel.

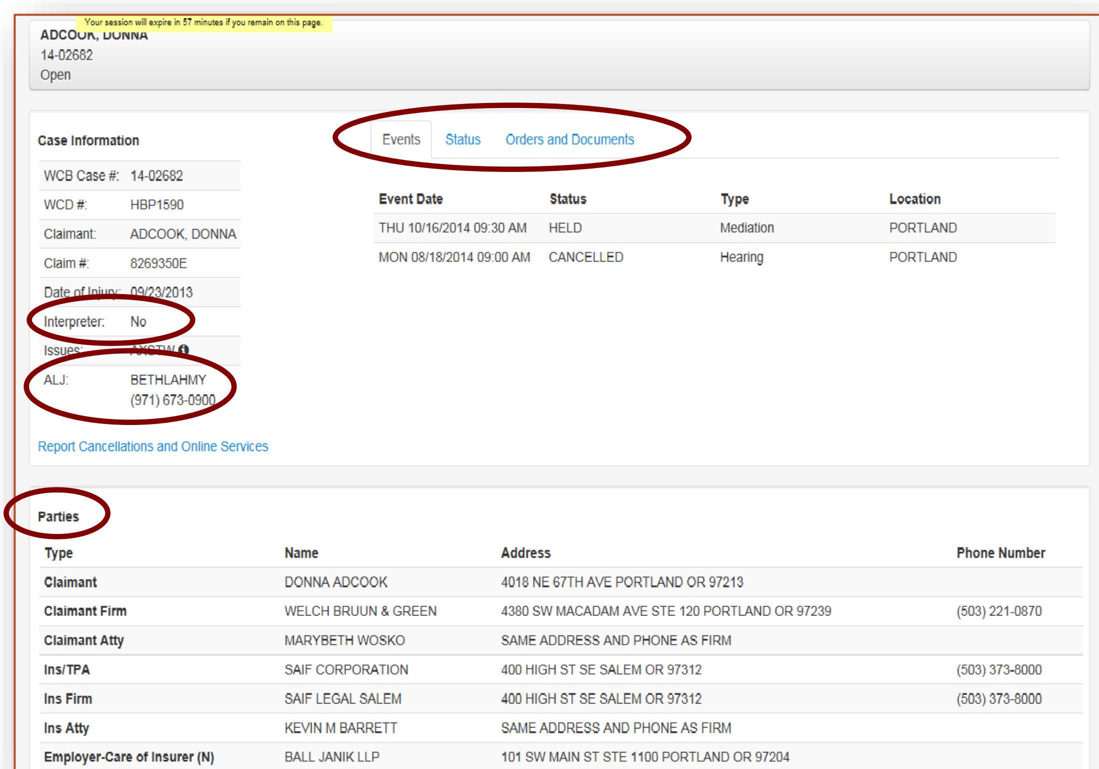




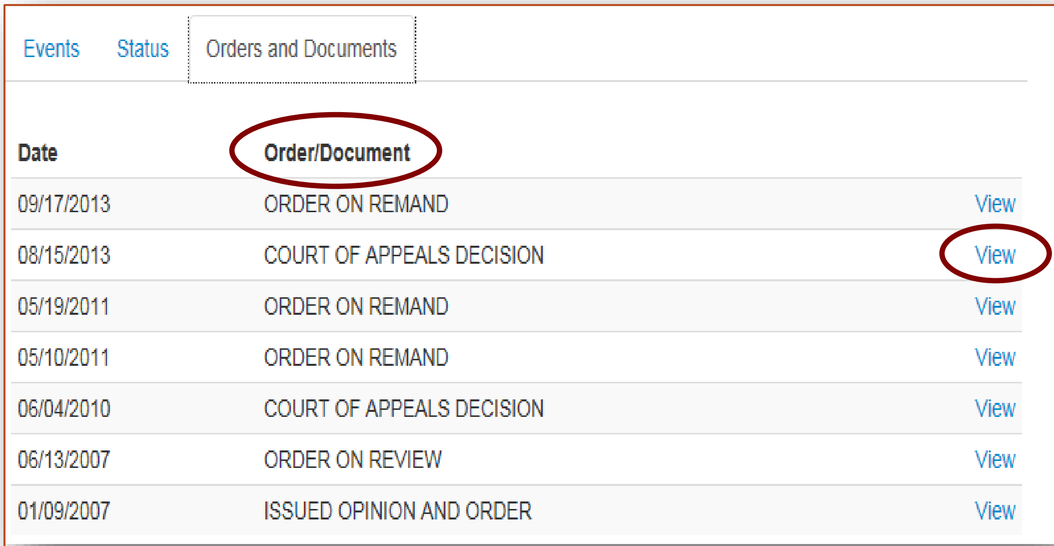
- The "Case Status" web page quickly provides the claimant's name, WCB case number and indicates whether the case is either "Open" or "Closed." To see further detail, click on the box that surrounds the particular case.



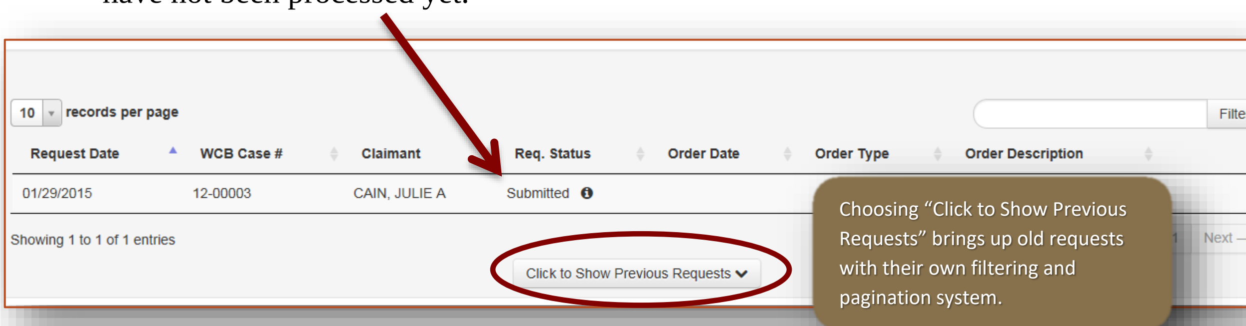
- More information is available in the drop down. Added party information, viewable documents, events, status changes, interpreter information, and ALJ contact information.

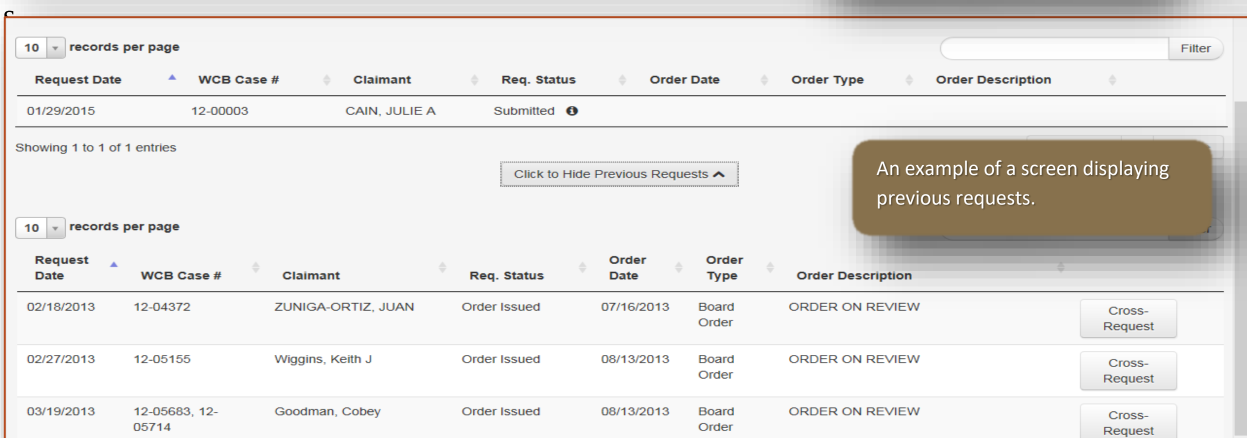


- Viewable documents are located under the orders and documents tab.

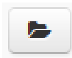


- Request a Hearing and Request Board Review tabs default to only showing requests that have not been processed yet.

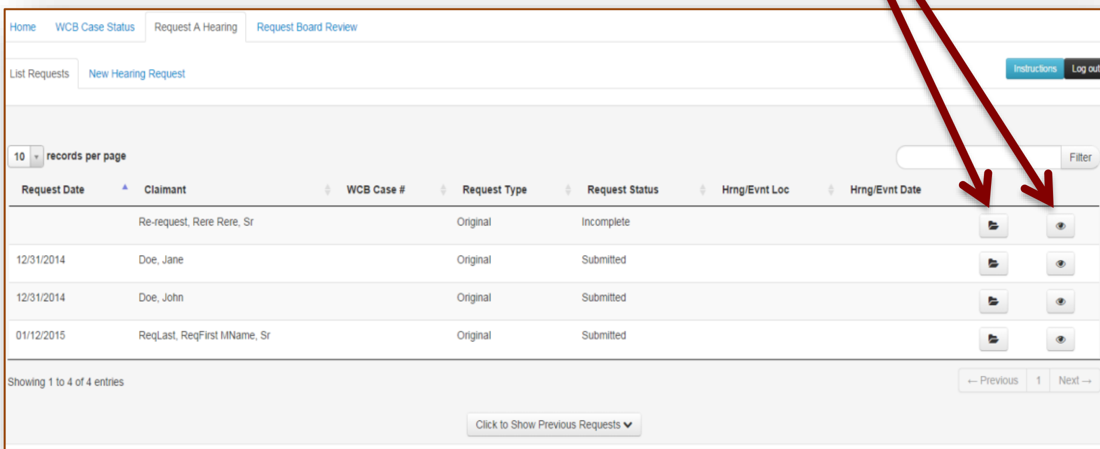




- The “Request a Hearing” web page now displays two new icons.

 Click on this icon to view Additional Documentation

 Click on this icon to View a Request

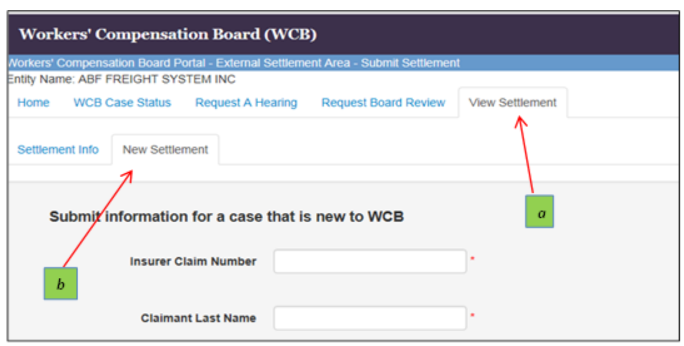


WCB Settlement Documents

How to upload settlement documents

A. For a new (pre-litigation) case, begin by clicking on the Settlements tab (a), then go to New Settlement (b)

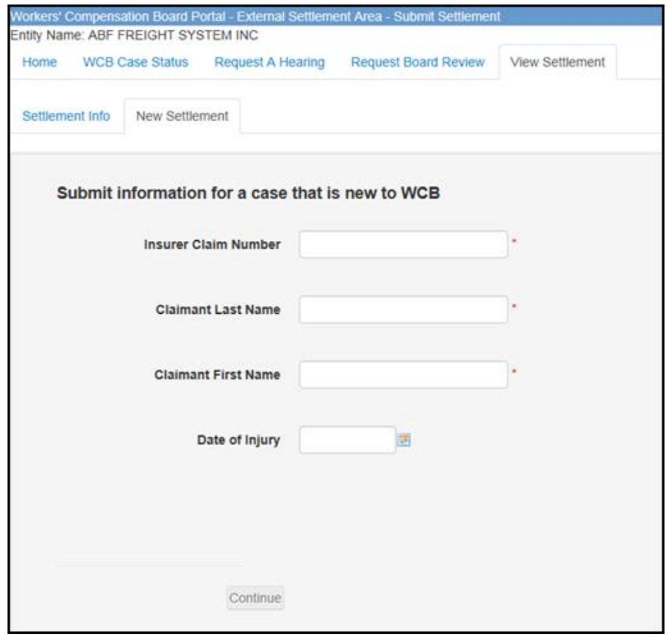
B. For an existing case with a WCB number, you can access it in your WCB Case Status page and upload documents from there (c).



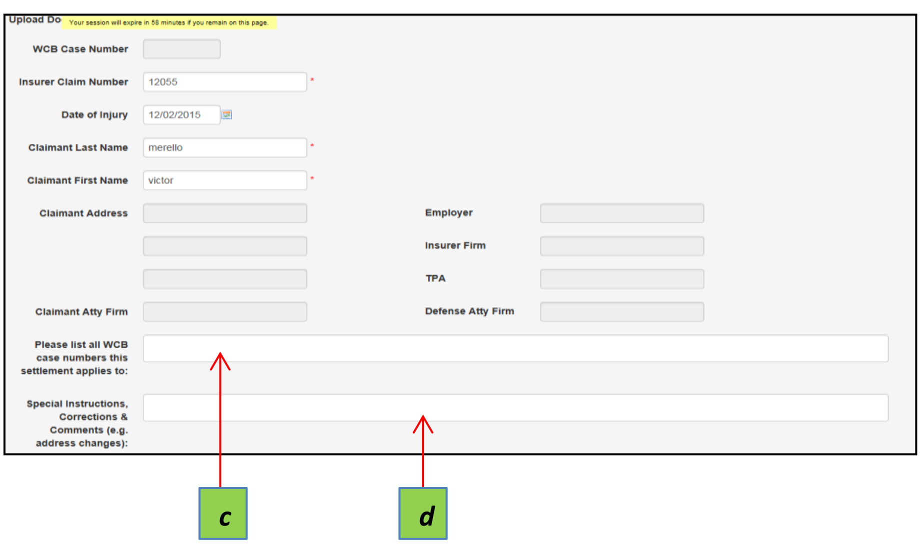
New Case

A. New Case:

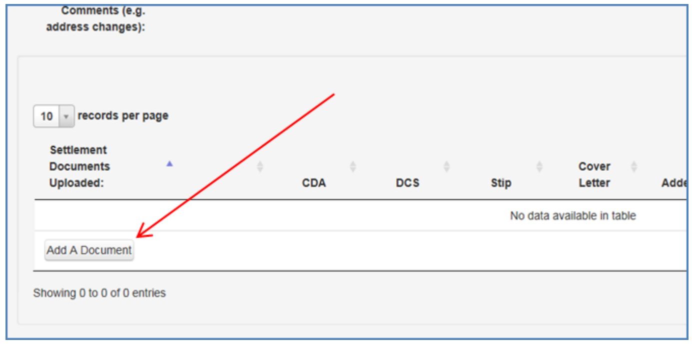
1. Click on the Settlement tab.
2. Enter the three required pieces of information:
   - *insurer claim number*
   - *claimant last name*
   - *claimant first name*
3. Enter the date of injury (optional). If you have multiple dates of injury for the claimant, entering a date of injury will enable you to more easily identify this case in your list of settlements.
4. At this stage in the processing, WCB is not asking for party information, addresses and other case information. We will take that information from the settlement documents you are uploading.



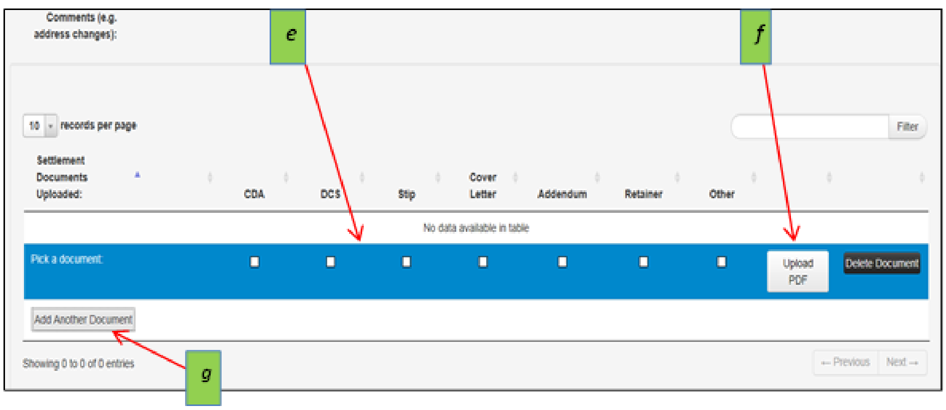
5. Click Continue
6. The next screen will display the information you've provided and give you two dialogue boxes. Because WCB has not yet processed the documents at this stage, case information such as parties and addresses will not appear on your screen.
   - In the first dialogue box, you can let us know if this settlement applies to any WCB case numbers (WCB staff will verify this) (c).
   - The second box is for you to provide us any special information, instructions or corrections (d).

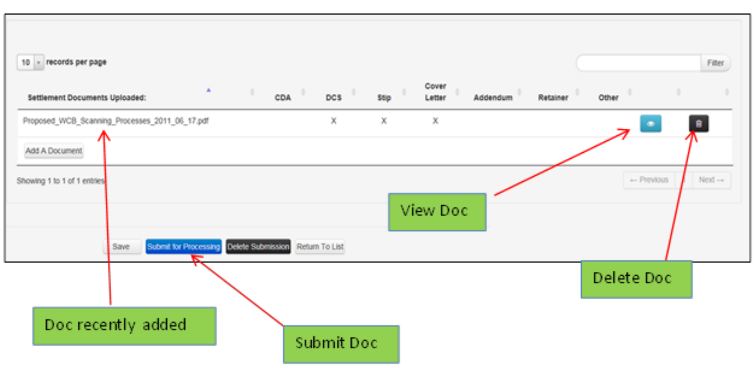


7. To upload settlement documents:
   - click on the "*add a document*" button.
   - The screen will refresh, asking you what kind of document you are attaching CDA, DCS, other, etc.



   - At least one of these boxes must be checked. If the attached document contains more than one item (for example, a cover letter and DCS in one PDF document), click multiple boxes (*e*).
   - Then click "*Upload PDF*" – this will browse your computer for files. Select the document you wish to upload. It must be a PDF document.
   - To add additional documents, click "*add Another Documents*" (*g*) and follow the same process. If you have multiple documents for a settlement package, continue to add documents to your submission until you are finished.



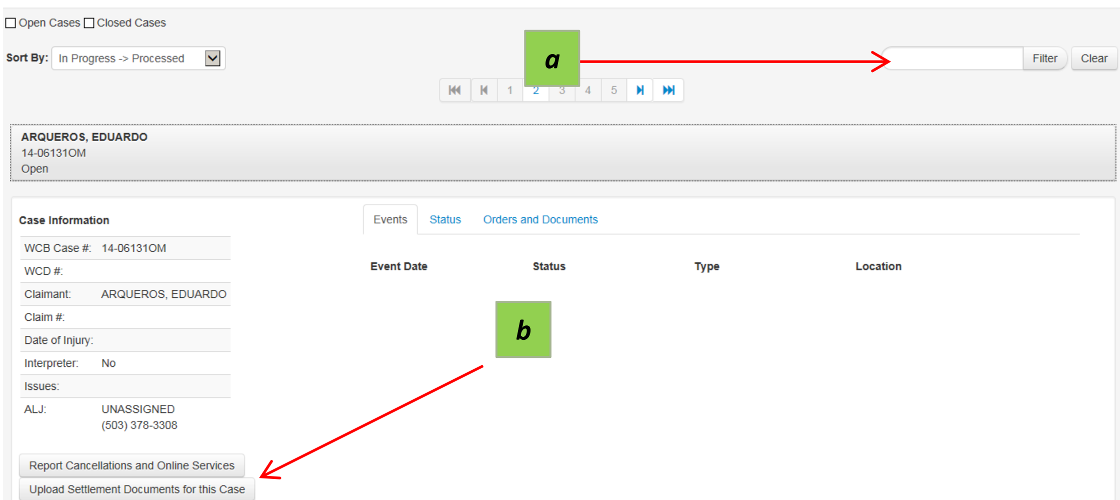


   - Click the "*save*" button to save the work you have done.
   - The screen will refresh, showing the names of the documents you have attached. WCB does not require any specific protocol for naming your files. You can view or delete those documents by clicking on the icons on the right.
   - When you are done attaching documents, click on "*submit for processing.*" After you have done so, a message will appear across your screen letting you know we have received the documents. If there is an error (such as attaching a Word file instead of a PDF), you will receive a notice explaining what needs to be corrected.

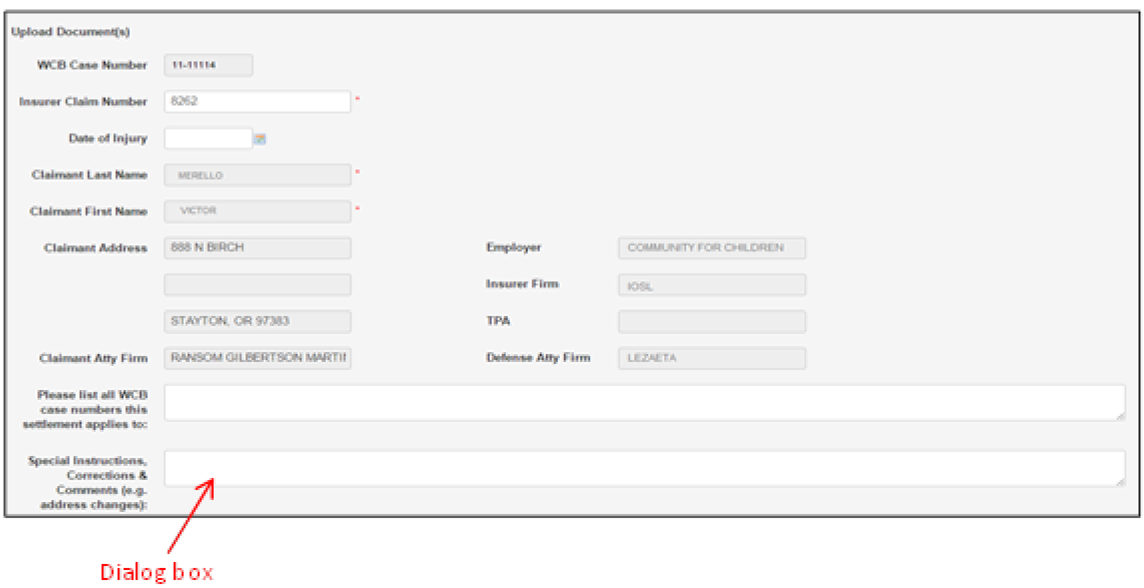
Existing Case

A. **Existing Case**

1. Access the existing case from your WCB Case Status tab. Type in the claimant's last name or the WCB number in the "filter" box for quick access (a). By taking this route, you can identify the specific case you are settling and save a few steps in data entry.
2. Click on the button "Upload Settlement Documents for this Case." (b)



3. The screen will display the case and party information we have in our WCB database.

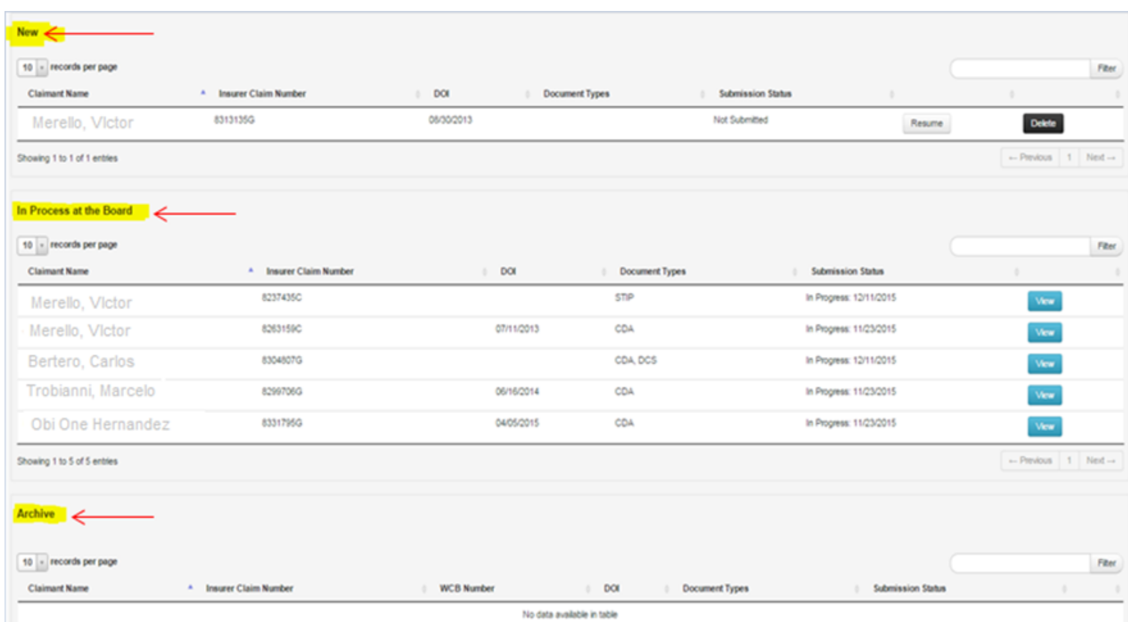


Please use the dialogue boxes above to alert us to any changes, such as claimant's address or change in counsel. You can not change case information by typing in the display boxes on the screen. Only WCB staff can change the stored information in our database. But be assured we will review any corrections or changes you submit in the dialogue boxes.

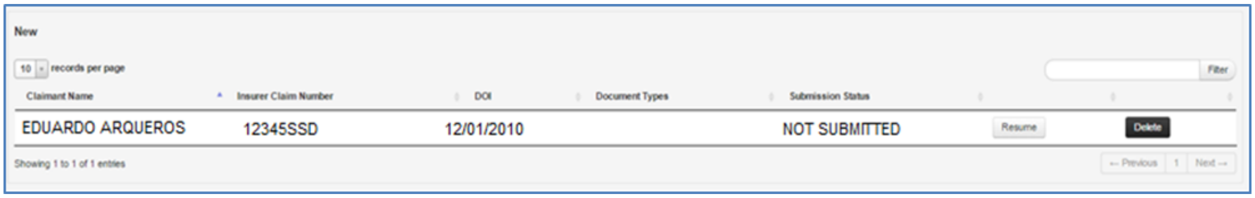
4. To attach files and upload documents:
   - Click on '*Add Another Document' (**c**)*
   - The '*Upload PDF'* button will be displayed (***d***)
   - Click on '*Upload PDF'*
   - Choose the file you want to attach
   - *The 'Submit for Processing'* button will be displayed (***e***)
   - You can add additional documents or click on *'Submit for Processing'* when you are finished

Status Screens

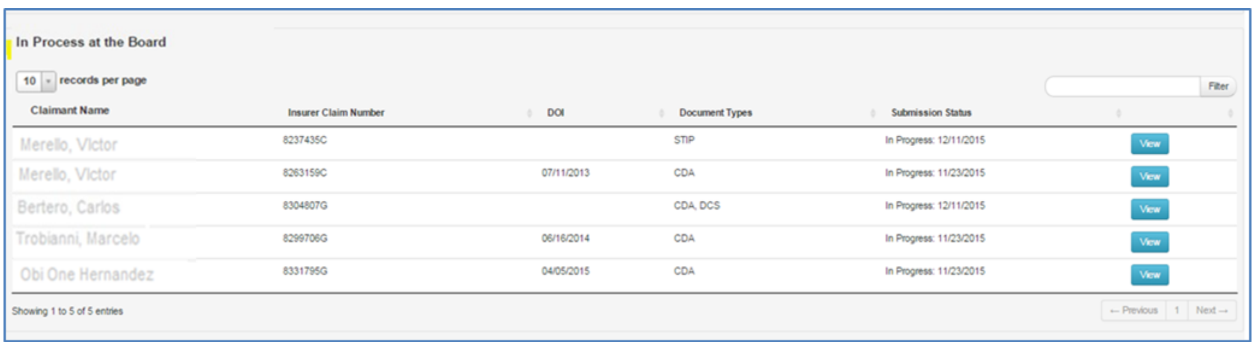
C. **Status Screens**
   - The ***Settlement Info*** tab is divided into three areas – *New*, *In Process*, and *Archive*.



- The ***New*** section shows settlement packages you have started but not yet submitted. It also shows recently submitted settlements that WCB has not begun to process. From this table, you can view, edit, and add documents to your settlement. Use the buttons on the right to work on the settlement. You can also delete a submitted settlement if WCB has not begun processing it. (Please note that if you wish to cancel or withdraw a settlement that has moved to the In Process table, you must contact WCB in a conventional method to let them know the settlement is off).



- The ***In Process*** section shows you settlements that WCB is processing. At this stage, if you are the original submitter, you can still add documents to your settlement by clicking on the View button and scrolling down to the upload section of the screen. This is where you can submit addendums or other documents to your settlements. (Please note that only the original submitter can add documents to the portal submission). When submitting additional documents from an In Process case, the "save" button will attach and submit the document to WCB.



- The ***Archive*** section will display settlements that have been finalized by a WCB order. The *View* button will take you to the WCB Case Status screen, where final orders and settlement documents are stored.

Email Notifications and Messages

D. **Email Notifications and Messages**

1. There are three notifications from WCB that you will receive during the settlement submission process.
2. The first one is a message across the top of your screen advising you of the status of the submission.
   - A red error message will advise you of any errors in saving or submission.
   - A yellow message will tell you that changes in your draft settlement package have been properly saved.
   - A green message will advise you that your submission has been successfully received by WCB.
3. The second notice is an email message from WCB when processing of the settlement has begun. At this stage, we will enter case data and associate the case with all parties listed in the documents. WCB will send you an email confirming receipt of the settlement and notify other parties who are portal users that a settlement has been submitted in the particular case. The WCB case number(s) will be identified and referenced in the text of the email. You will also be notified which parties do not have portal accounts and were not copied on the email acknowledgment.
4. The third notice will be an email after an order has been issued on the settlement documents. If it's an "Oregon Workers' Compensation Board Approved CDA," the text of the email will show you the official approval date. For other settlements, such as a DCS or stipulation, the email does not represent the official WCB approval date. The order itself is the official document. Users can access a scanned copy of the original documents in your WCB Case Status tab. The scans will likely be viewable about one day after the email notification (depending on location, users may have already received the mailed order by then).

Practice Tips and Things to Remember

E. **Practice Tips and Things to Remember**

1. Portal account administrators can grant authority to staff to submit settlements or have "**read only**" access. The ***User Detail*** tab is where this access is granted.
2. A settlement submission must include at least one settlement document (CDA, DCS, or Stipulation). You must check at least one of those boxes when submitting.

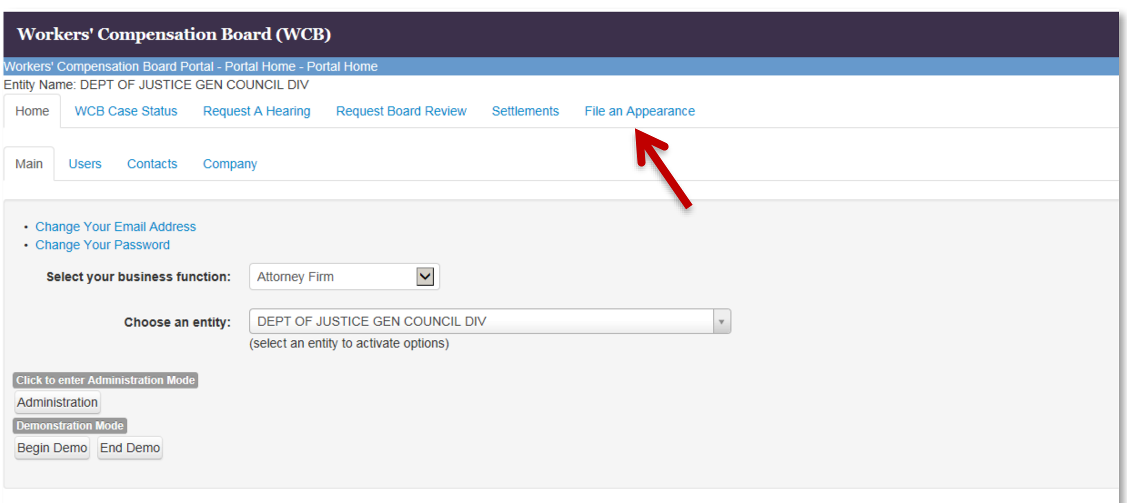
3. Multiple documents can be uploaded for a single claimant's settlement package. You do not need to start a new settlement submission for each settlement document.

5. Only the original submitter can change or add documents to a settlement submission. If you are not the submitter and wish to upload an addendum, for example, you must arrange to have the original submitter send it through their portal account. However, all portal parties will be able to view the submitted documents.
6. Depending on the type of settlement, WCB may create new WCB numbers for your settlement package. A CDA, for example, will have a new number with a “C” at the end.
7. WCB staff will always verify any WCB case numbers you give us in a settlement package. Depending on the circumstances, WCB may apply or create new case numbers to the settlement. The email notifications and the portal status screens will advise you of these numbers.
8. Settlement withdrawals and cancellations can not be done through the portal once WCB has begun processing the case. To safeguard and prevent against accidental dismissals and withdrawals, WCB requires that you notify them conventionally

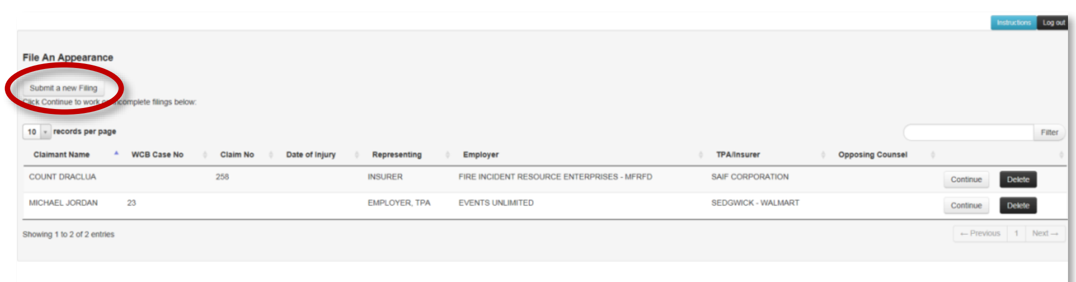
File an Appearance Tab

This tab enables you to file your notice of representation with the Board electronically while providing electronic copies to other portal users.

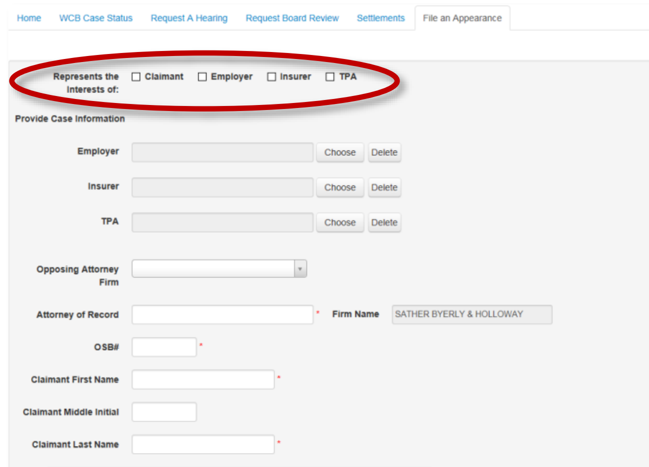
A. Click the “File an Appearance” tab



B. You will see a table of any “in progress” (unfiled) submissions that you have started. To submit a new filing, click the button for “Submit a New Filing.”



C. Check the boxes to indicate who you are representing. You can click multiple boxes, with the exception of representing Claimant. If you represent Claimant, you won't be representing any other parties.

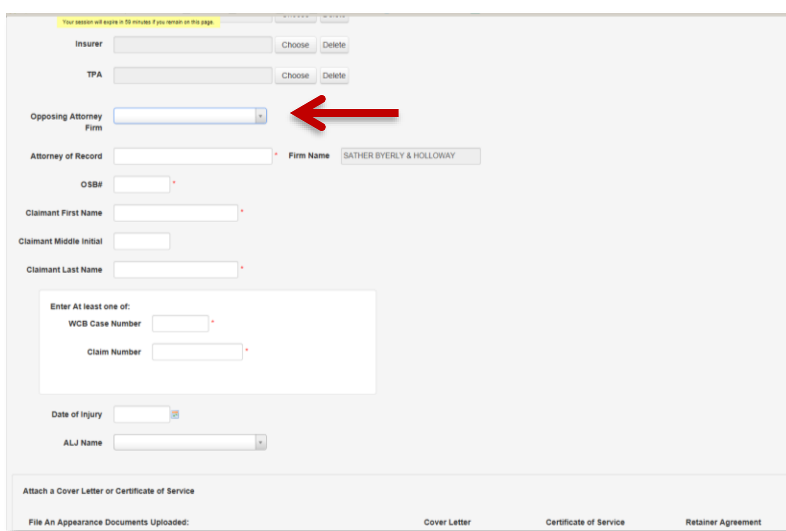


D. Provide Case Information: On this screen, there are several boxes to enter data. Any box with a red asterisk is a mandatory field. We also require that you identify the entity you have indicated you are representing (i.e., the boxes you checked above).

To identify the employer, click "Choose." This will take you into the WCB database of employers. Because this is a large database, the screen may take time to load. Click the downward arrow and begin typing the name of the employer. As you continue to type, the list of possible choices will narrow. Click on the employer's name to generate the mailing address from WCB's database. If you don't find the employer, you can hand-enter the employer information by clicking the button "Add New."

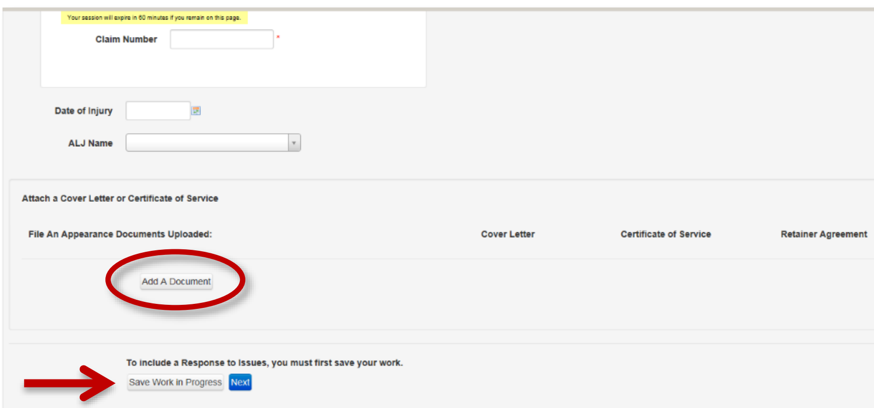
Repeat the same process for Insurer or TPA, as appropriate. Please note that you can select either insurer or TPA, but not both. We understand that many insurers utilize a TPA to process their claims, and you may actually represent both. For purposes of this screen, we ask that you select the entity that is processing the claim.

E. Opposing Attorney Firm. Utilize the drop down arrow and begin typing in the box to find the firm. Click on the firm name, which will populate that box on the screen. This will enable your filing to be served upon that firm, if they are also a portal user. You can leave this blank if there is no opposing attorney firm.



F. Attorney of Record. Type in the name of the individual attorney from your firm that is assigned to the case.
G. Type in the assigned attorney's OSB number.
H. Type in claimant's first and last name. Middle initial is optional.
I. Enter a WCB case number or a claim number. You can enter both if you know them. This information will assist us in processing your filing.
J. Date of Injury and the <u>assigned</u> ALJ are optional fields. No, you may not request a particular judge in this box.
K. Attachments:

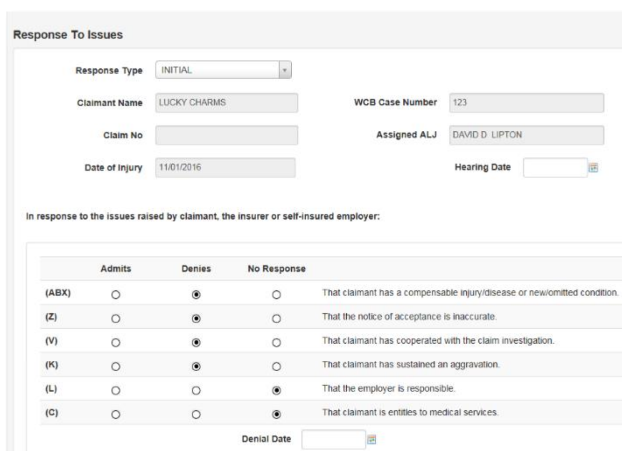
   If you are representing the claimant, a Retainer Agreement must be attached to your submission. Other attachments are optional. If you have an important communication to the Hearings Division (such as a motion), you can provide that in your cover letter. All attachments will be served upon other portal users.



L. You can hit "Next" to take you to a confirmation screen. This will allow you to see your filing information and double-check the data, before hitting the submission button.
M. If you wish to include a Response to Issues with your Appearance, click the "Save Work in Progress" button. This will return you to the confirmation screen to double-check your filing data. To include the Response to Issues, scroll down to the bottom of that screen and click the button.

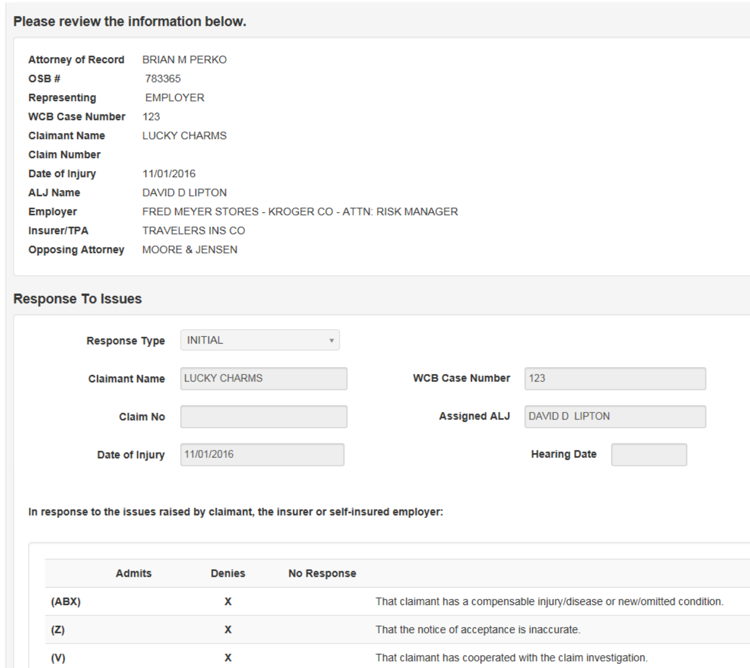
Response to Issues:

A. There are two ways to file a Response to Issues. You can submit it at the time you file your Appearance:
B. After saving your Appearance, scroll down to the bottom of the confirmation screen and click on "Include Response to Issues." The Response form will appear on your screen.

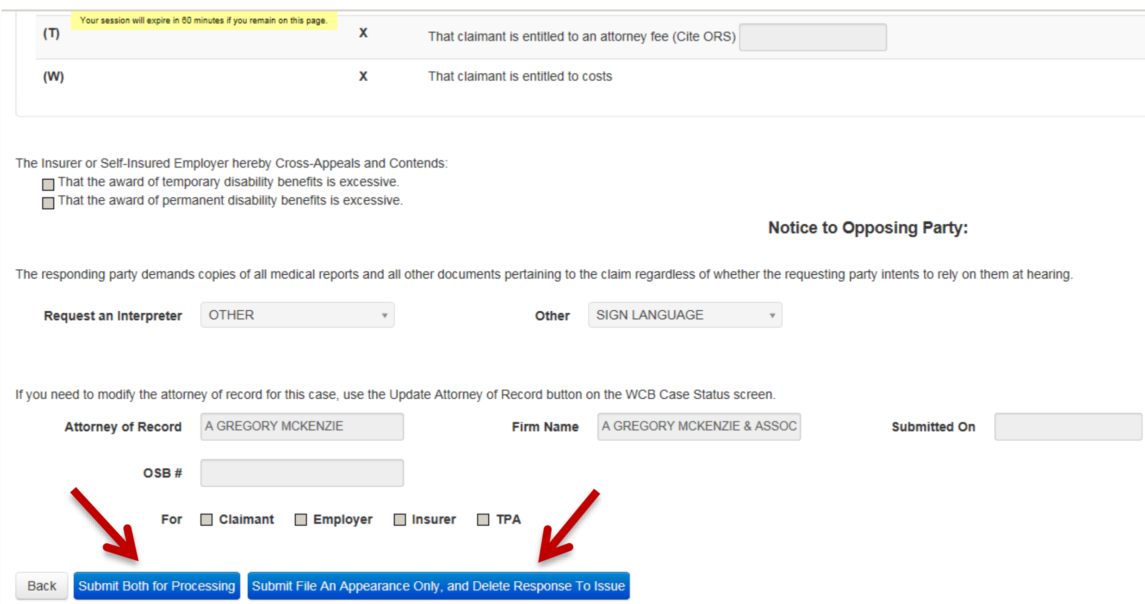


C. This electronic form is identical to the paper form. You can check the boxes to "admit" or "deny" the issues (but you can't admit and deny at the same time). Any issue you do not admit or deny will ultimately populate as "no response."

D. After completing the form, click "Next." This will take you to a confirmation screen for your verification. In all cases, the portal will return you to this verification screen for the opportunity to double-check your entry.



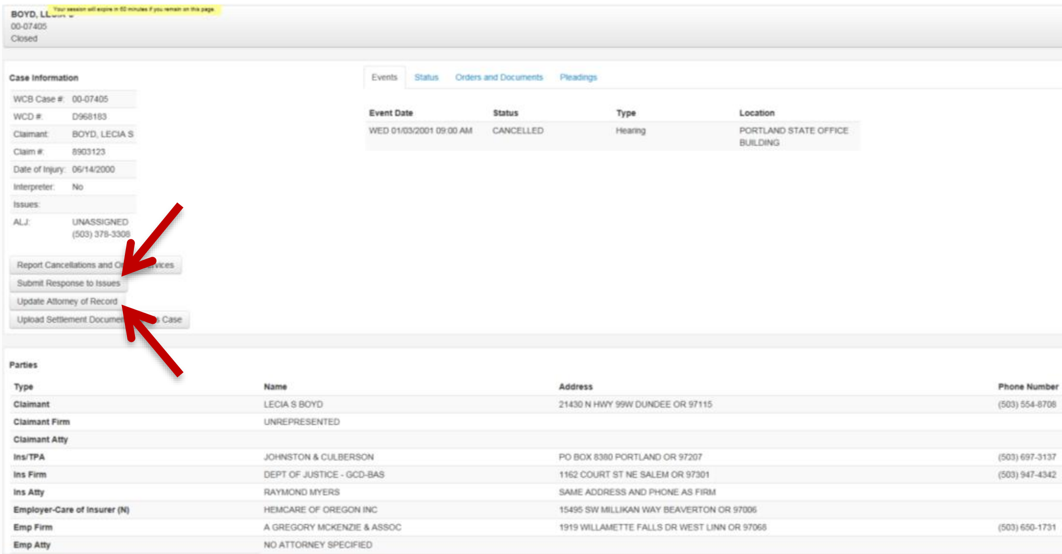
E. You can submit both the Appearance and Response, or if you wish to submit just the Appearance, you can delete the Response.



F. If your firm is already assigned to a case, you can submit your Response to Issues from the WCB Case Status screen. Find the case from your WCB Case Status tab (the "filter" box is a quick way to find the case). On the left side is a button for Response to Issues.

Update Attorney of Record:

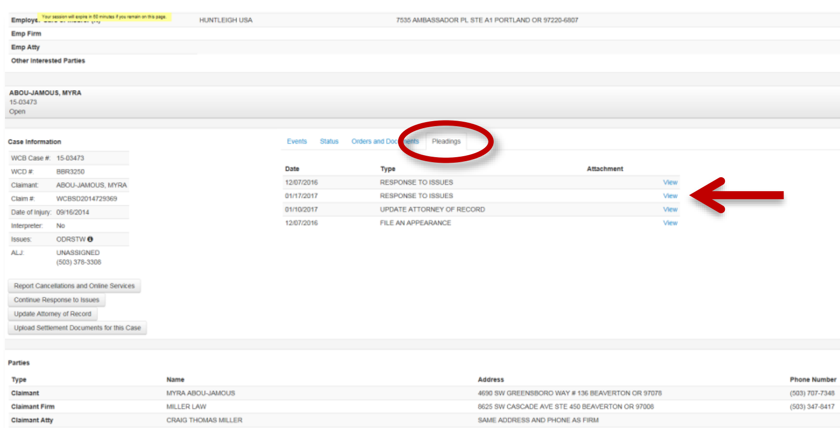
A. If your firm is changing the assigned attorney, you can file this change through the portal. Find the case in your WCB Case Status tab. On the left side, click the button for "Update Attorney of Record." A small screen will appear. Simply type in the new attorney's name, OSB number, and hit "submit."



Email notifications/Service on other parties/printable forms:

A. Like our other portal features, you will receive an acknowledgment email upon submission of a filing. In that email, you will be told which parties were served with your filing via the portal. You will also receive an electronic link that will enable you to generate a paper form copy of the filing. You can save or print that form for your records.

B. Storage of these filings will be on the WCB Case Status tab in a new sub-tab labeled "Pleadings." At any time, you can go to the Pleadings tab to view and print filings associated with that case.



Frequently Asked Questions

- **I want to use the WCB portal. How do I get an activation code?**
  WCB sent out activation codes by mail. If you do not have an activation code you can contact WCB and we will provide you with the code. Contact us at https://portal.wcb.oregon.gov or call 503-378-3308
- **Can I have access to see the approvals for my settlements and stipulations from WCB?**
  When you sign up for the WCB portal you can choose what email notifications you wish to receive. Currently, notifications of CDA approvals are sent via the portal. We will be adding notification of other types of settlements in the future.
- **My company has several subsidiaries. I want to make sure that my portal account information comes directly to me. How can I do that?**
  Please contact WCB at the time you set up your portal account. We will walk you through the process and make sure you are getting the information you need. We will also verify the company information at that time.
- **There has been a staff change at my office and I want to remove someone as a contact. How do I do that?**
  As long as you are the administrator for your account you can go into the "contacts" and/or "users" tab and remove the person. If the person you want removed was the administrator you will need to designate another person as your administrator by giving the proper authorizations to the new person or you can contact WCB and we will assist you in removing the contact and naming a new account administrator.
- **How do I cancel my account?**
  Please contact WCB and we will deactivate your account.
- **My notification emails are coming in sporadically? What is going on?**
  Please contact WCB as soon as possible. We can track each notification to see what is happening and restore your notifications. Fast and immediate service is very important to us.
- **How can I print my notifications?**
  Most notifications come via your email. You can print them from there. If you would like to print a Request for Hearing or Board Review you may do so by clicking "view request" and clicking the print button within Adobe..
- **How do I file an amended or corrected Request for Hearing through the portal?**
  Begin the process just like you would a normal Request for Hearing. On the Request for Hearing tab there is a place for you to choose the request type.
- **I filed my Request for Hearing by paper but want to amend/correct/supplement my request through the portal. Can I do that?**
  Yes, on the Request for Hearing tab there is a place for you to choose the request type.
- **Do the other parties on my Request for Hearing or Request for Review get notified by the portal?**
  Parties that are signed up for the portal will automatically receive notification of the filing. You will receive an email listing the parties **not** on the portal. You may print a copy of your filing to send to those parties.

- **How do I add another user to my account?**
  Have your administrator log into the portal. Click the "users" tab. Then click the "Add user" button. Please make sure you enter a valid e-mail address when adding a user.
- **I am an attorney and a moving to another firm. Can I change my account and take my portal case information with me?**
  Yes, we will activate a new account for you under your OSB number. Please contact WCB to make this change..
- **Our firm name has changed. Can we change it or does WCB do that for us?**
  If you have already notified WCB and are participating in the Portal then the change should already be reflected. If it hasn't please contact us and we can make the change immediately.
- **My name is spelled incorrectly in the contact section. Can you fix it?**
  The administrator for your account can fix it by clicking on the "contacts" tab and then "edit contact." If you need assistance, please feel free to contact WCB.
- **My email address has changed. Can we update it?**
  The administrator for your account can fix it by clicking on the "contacts" tab and then "edit contacts." If you need assistance, feel free to contact WCB.
- **I can't get on the portal. Every time I try it continues to say "processing." Can you help?**
  Feel free to contact WCB, we will verify that your account is active and attempt to diagnose the problem you are having.
- **I don't see a place to upload my attorney retainer agreement on the request form. Where is it?**
  When requesting a hearing or requesting board review, you will fill out the form and press "submit." The next screen will ask you if you want to upload supporting documents.
- **Can I print out a hard copy of my Request for Hearing or Request for Board Review before I submit?**
  No, once you submit your request you will have the ability to print out a hard copy but not before.
- **There is no "submit" button on my screen?**
  Please contact WCB and we will attempt to diagnose your issue.
- **I can't "save" my request, can you help?**
  Please contact WCB, someone will verify that you have the proper authorization to save requests. If you do we can attempt to diagnosis the problem. If you do not, we can direct you to your account administrator who can provide you with authorization.
- **Can I delete incomplete requests?**
  If you have saved an incomplete request, you can delete it. Located at the bottom of the Request for Hearing and Request for Board Review form there is a button to click entitled "Delete Incomplete Request."

Setting Up Your Contacts

The Workers' Compensation Board offers a number of notifications through the portal. Those notifications are listed under the "Contacts" tab in your portal account. Here are a few things WCB recommends that users can do to make sure they receive all notifications they are expecting.

- Verify Notification:
- It is important you set up your contacts correctly. If you are not receiving notifications this is the first place to look. Please verify that the appropriate check box is marked.
- Verify your Email:
- If your email address has been entered incorrectly you will not receive the notifications.
- Check Contact History:
- You can check to see if a notification was sent to you in the "Contact History" link under the "Contacts" tab. This will show you all the notifications sent to the contact you choose.
- Firm Notifications vs. Person Notifications:
- If you're not receiving a specific notification please also verify that you are not set up to receive a specific Attorney's notifications. To edit this you need to uncheck the box that says " Notify me of cases I am directly involved in." This will make ensure you get all notifications.
- More than one Contact:
- If you have more than one contact make sure you check all the above for each contact.
- Always Accept Email from the Portal:
- Please add the Portal Email address to your email addresses that are considered safe. This way spam filters or other email rules will not mistake the notifications as spam.

Check Your Firewall/Spam Filter/Email Settings:

Below is a list of articles regarding spam filters for various email providers. These articles vary in difficulty but are a first step for users who are having trouble with not receiving email notifications. This list is a compilation of major email providers as well as a few others.

- Comcast
- Yahoo
- (Google) Gmail
- Hotmail
- Outlook
- CenturyLink (Qwest)
- AOL
- Frontier
- BendBroadBand - TDS
- Mac Mail
- FiOS (Verizon)

You can also contact your Internet Service Provider (ISP) to assist you further with any issues you are having with these settings.

Contact Portal Support:

As always you can contact WCB for assistance. The portal email address is portal.wcb@wcb.oregon.gov or call 503-378-3308 and ask to be connected to Portal Support. We also offer one on one training where we would be happy to come to your location and assist with setting this up with you.

Portal House Keeping:

The Workers' Compensation Board Portal is designed to be managed by the users. WCB does not have access to usernames/passwords or specific user settings. It is vital that Portal entities make sure to keep their users and contacts up to date. WCB recommends that you include Portal username/contact setups in your personnel check lists. This ensures that when an employee is hired/leaves that your portal account stays secure. Below is a checklist designed to assist users in this process.

Adding New Users:

- Have your Administrator log into your portal account and click the "Users" tab.
- Click "Add User"
- Fill in the required and optional information.
- Choose the Authorizations this user needs
- Click "Save" when finished

The new user will receive an email with their username and a link to create their password.

Creating A Contact:

- Log into the Portal.
- Click the "Contacts" Tab.
- Click "Add Contact."
- Fill in the required and optional information.
- Choose the notifications that this email address will receive.
- Click "Save."

Please double check the email address is entered correctly to ensure notifications will be received.

Removing a User:

- Have your Administrator log into your portal account and click the "Users" tab.
- Select the User you want to remove.
- Click "Remove User"
- Click "Remove User" again at the bottom of the page.

Removing a Contact:

- Log into the Portal.
- Click the "Contacts" Tab.
- Select the contact you want to remove.
- Click "Remove Contact."
- Click "Remove Contact" again at the bottom of the page.

Contact Portal Support:

- As always you can contact WCB for assistance. The portal email address is portal.wcb@wcb.oregon.gov or call 503-378-3308 and ask to be connected to Portal Support. We also offer one on one training where we would be happy to come to your location and assist with setting this up with you.

Settlement Submissions

The Workers' Compensation Board (WCB) began accepting settlement documents electronically through the WCB Portal on January 25, 2016. What follows is a list of questions received since the launch.

- **Why can't I find the settlement tab in my portal account?**
  Account administrators were granted access to the settlements tab during the initial rollout. Your account administrator can grant authorization to submit settlements or, alternatively, give you "read only" access. The "user detail" tab is where authorizations are granted.
- **I'm unable to type the employer's name or opposing counsel's name in the boxes on the upload screen.**
  Because that information is contained in the settlement documents you upload, WCB is not asking you to give it to us again. WCB staff will create the case information from your settlement documents.
- **We're settling a case that is set for hearing. The WCB number does not show up on the settlement screen, and I can't type it in the box.**
  If you are submitting settlement documents on a case currently in litigation, you can access that case from your WCB Case Status screen. Click the button on the left to upload the settlement documents. The data fields will populate with the information contained in WCB's Hearings Division file.

- **I'm trying to upload an addendum, but the "submit" button is not available to me.** Only the original submitter can upload additional documents. If you were not the original submitter, you will need to contact opposing counsel to have those documents uploaded. In addition, please note that any initial settlement submission must include a Claim Disposition Agreement (CDA), a Disputed Claim Settlement (DCS) or a Stipulation (Stip) – i.e., a "settlement document." To submit an addendum after your initial submission, click the "view/update" button on the case from your Settlement list.
- **If I'm submitting a cover letter with the settlement documents, do I need to upload it as a separate document?**
  You can submit them all in one document, or in multiple documents. WCB can process them either way.
- **Will the portal system notify opposing counsel that I have submitted a settlement, similar to a portal hearing request? When do those notifications go out?**
  The portal system will generate an email to the submitter and opposing counsel once WCB has begun processing the settlement submission. However, in order to receive those notifications, each party must edit their portal contact to elect receipt of those notifications.
- **Will the portal notify me when a settlement has been approved?**
  If you've elected to receive email notifications, an email will be sent to you announcing approval of a settlement submitted through the portal. Portal users will be directed to view a scanned copy of the order/agreement in their WCB Case Status screen.
- **Will my client receive a paper copy of the order in the mail?**
  For a DCS or Stipulation, all parties will receive a copy of the approval/dismissal order by mail. Except for those CDAs approved by Board/ALJ order, notice of the CDA approval is posted on WCB's website, and sent by email to portal users.
- **When I submit a combination CDA/DCS agreement, will I get an email or electronic notice when both agreements have been approved?**
  You will probably receive notice of the CDA approval first, via WCB's website or an email from the portal system. The DCS order is not sent electronically, but it can be found in your WCB Case Status screen ("orders and documents" tab). If you are a portal user, you will receive an email notifying you that an order issued. Please note that these "combined" agreements are processed in tandem. Thus, if you have received notice of an approved CDA, the DCS has also been approved.
- **I'd like to know the status of my settlement submission, but I don't necessarily want to get more emails.**
  You don't have to sign up for email notifications to see that your settlement is in process at the Board. The Settlements tab will display the status of your cases. However, the email notification system enables the parties to copy opposing counsel via the portal without having to send a paper copy of the transmittal letter.
- **I would like to file more things electronically in the WCB Portal. When will I be able to file a Response to Issues, a brief, or briefing extension through the portal?**
  WCB has a long-term plan to continue adding features to the portal. Next to come is Response to Issues. Your ideas, requests, and feedback are always welcome. Please contact WCB at portal.wcb@wcb.oregon.gov.