

# ECOMPBOARD

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WCB Portal Instructions



<https://portal.wcb.oregon.gov>



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# 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.

Welcome to the Workers' Compensation Board Portal

**New user?**

Logon access is provided by a system administrator.  
**First time users** [click here](#) and enter the Activation Information provided by the Oregon Workers' Compensation Board(WCB). If you have not received an authorization and access code, please contact [WCB Staff](#).

**Please Log In**

User ID:

Password:

[Login](#)

**Forgot Your Username or Password?**

Fill in your user ID or email address in the box below and we will send you an email with login instructions.

User ID or Email:

[help](#) [Remind Me](#)

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 case sensitive.** 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](mailto: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:

**Activation Code** already initialized, remove invalid code to continue.  
Code 16541682 already initialized for PACIFIC LIFE INSURANCE COMPANY, administrator (s) JOE TESTNAME,JOE TESTNAME

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 not case sensitive; however, please remember that your password you selected is case sensitive.**

*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.

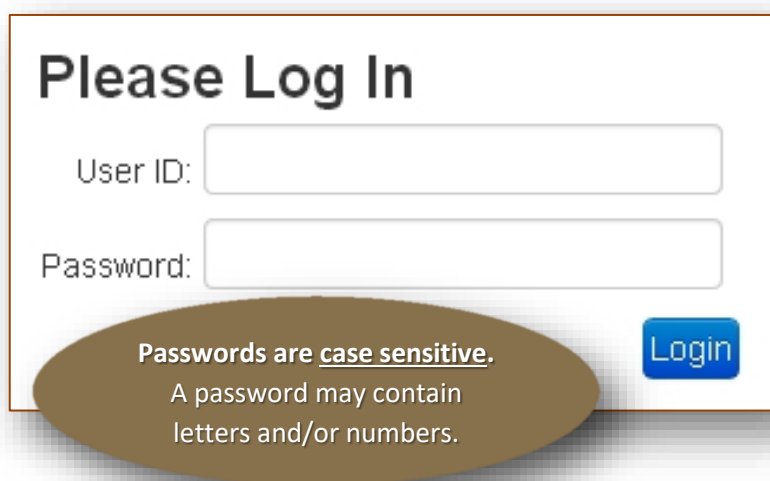
Please log in to verify that your access is working correctly.

## 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.

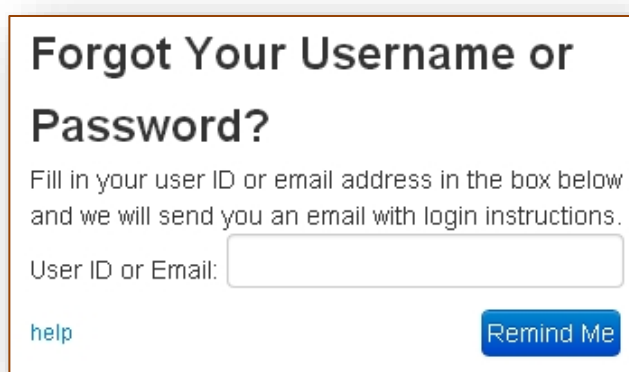


The login screen is titled "Please Log In". It features two input fields: "User ID:" and "Password:". Below the "Password:" field, there is a brown oval callout box containing the text: "Passwords are case sensitive. A password may contain letters and/or numbers." To the right of the "Password:" field is a blue "Login" button.

## User ID & Password

### Forgotten User IDs and Passwords

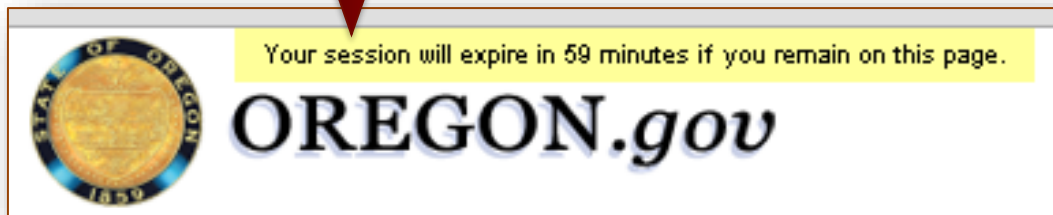
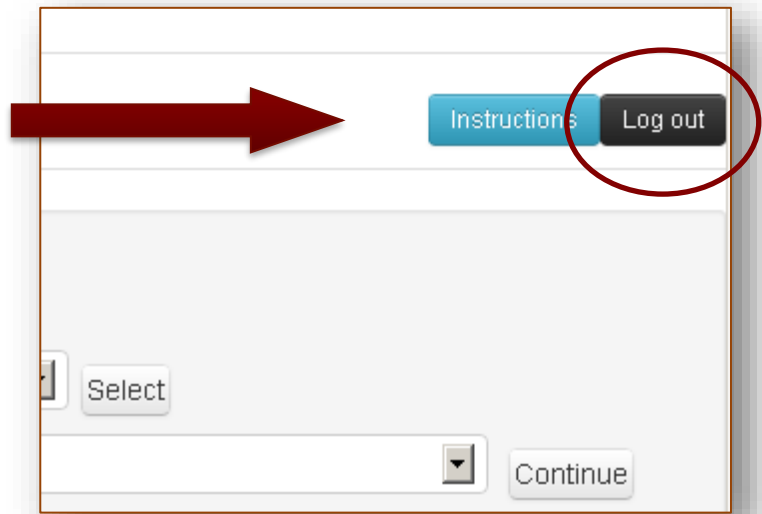
- If you have forgotten your User ID and/or password, you may enter your email address and, if the system finds your email address associated with an account, you will be emailed your User ID and a link to reestablish a new password.
- Users can reset their own passwords at any time after logging in, 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.



The screen is titled "Forgot Your Username or Password?". It contains the text: "Fill in your user ID or email address in the box below and we will send you an email with login instructions." Below this text is an input field labeled "User ID or Email:". At the bottom left is a blue "help" link, and at the bottom right is a blue "Remind Me" button.

## Logging Out/System Inactivity

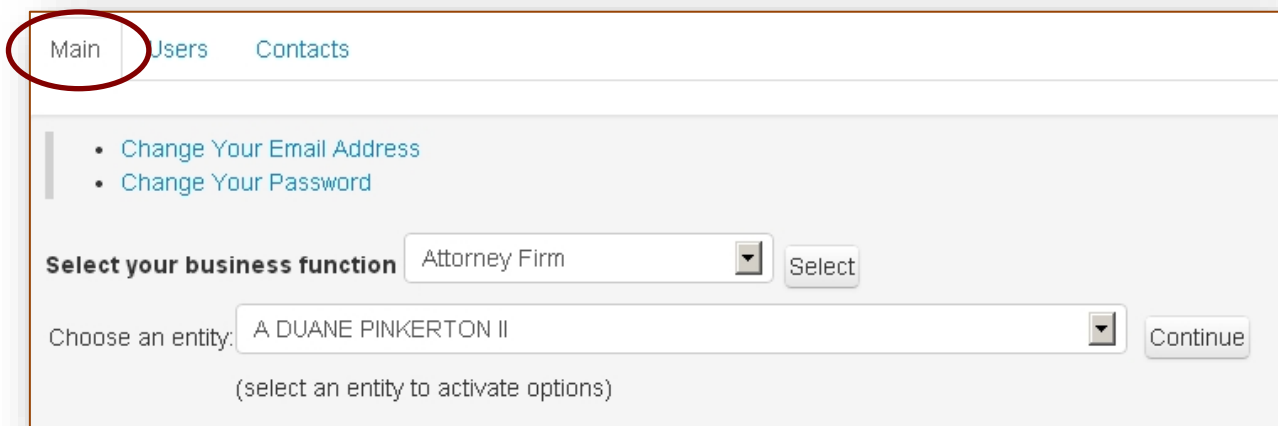
- You can log out from any tab in the portal by pressing the “log out” link located on the right side of the screen near the top of the page.
- Users are encouraged to log out when leaving their workstation.
- The system will automatically log you out after 60 minutes of inactivity. (Displays near the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



## Home Tab

### Main Tab

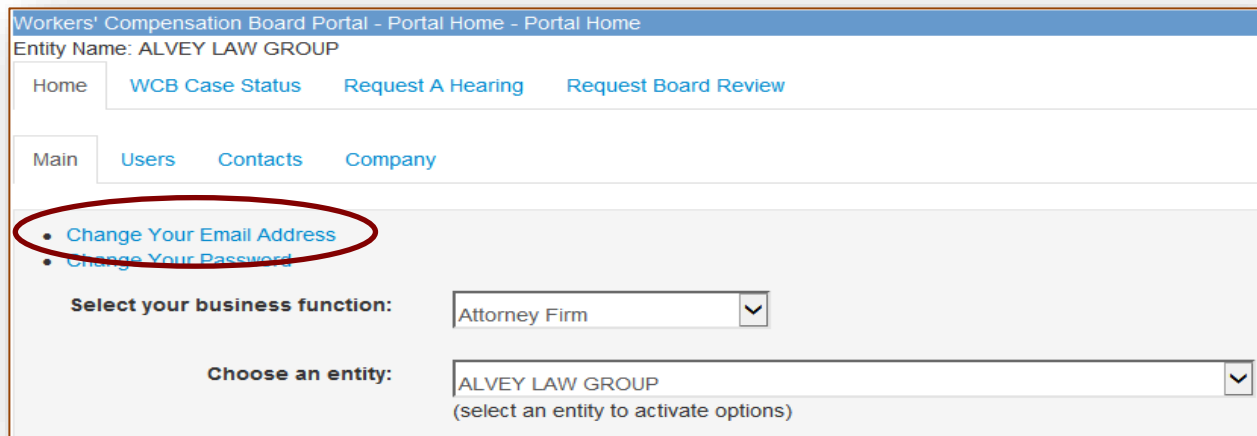
- All users have access to the Main tab, which identifies the entity you are doing business on behalf of and allows you to change your email and password associated with your account.



## 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.



Workers' Compensation Board Portal - Portal Home - Portal Home

Entity Name: ALVEY LAW GROUP

Home WCB Case Status Request A Hearing Request Board Review

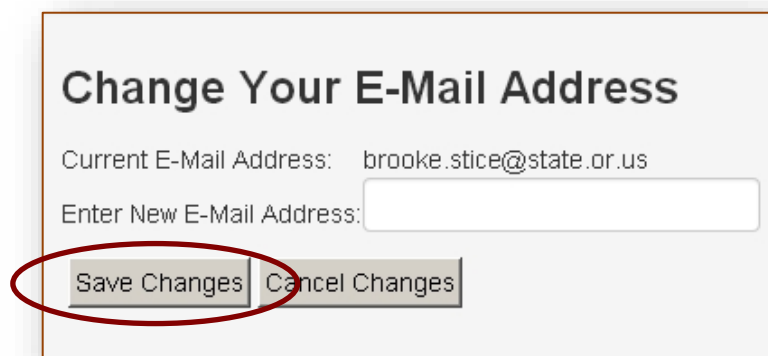
Main Users Contacts Company

- Change Your Email Address
- Change Your Password

Select your business function: Attorney Firm

Choose an entity: ALVEY LAW GROUP  
(select an entity to activate options)

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



### Change Your E-Mail Address

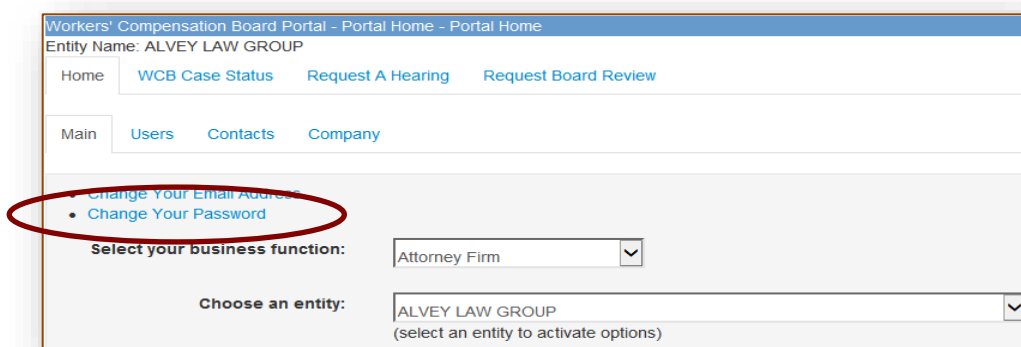
Current E-Mail Address: brooke.stice@state.or.us

Enter New E-Mail Address:

Save Changes Cancel Changes

## Change Your Password

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



Workers' Compensation Board Portal - Portal Home - Portal Home

Entity Name: ALVEY LAW GROUP

Home WCB Case Status Request A Hearing Request Board Review

Main Users Contacts Company

- Change Your Email Address
- Change Your Password

Select your business function: Attorney Firm

Choose an entity: ALVEY LAW GROUP  
(select an entity to activate options)

- 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 case sensitive.**

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.

Main **Users** Contacts Instructions Log out

User List User Detail

	Logon ID	First Name	Last Name	Email Address	Phone Number
<input checked="" type="radio"/>	SCROWXXX	Sheryl	Crow	brooke.stice@state.or.us	503-934-0118
<input type="radio"/>	MJAGGERX	Mick	Jagger	brooke.stice@state.or.us	503-934-0118
<input type="radio"/>	DARIMOON	Brooke	Stice	brooke.stice@state.or.us	503-934-0118

Add User Edit User Remove User

## 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.

Main Users **Contacts** Instructions Log out

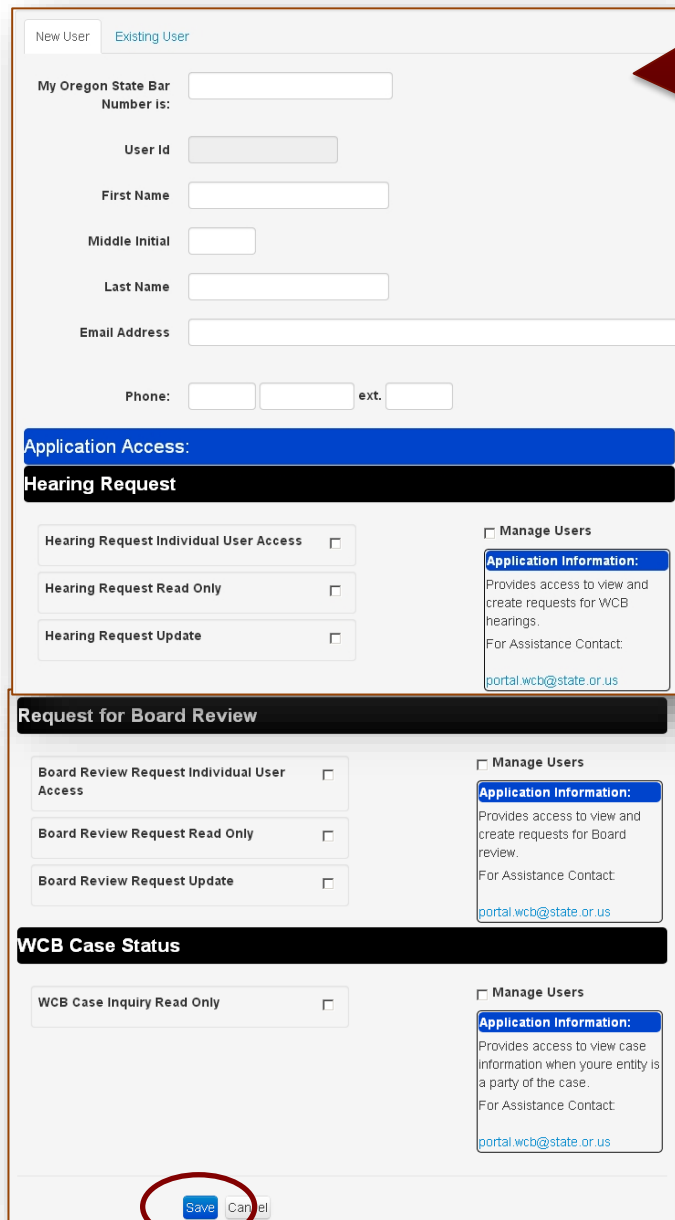
User List User Detail

	Logon ID	First Name	Last Name	Email Address	Phone Number
<input checked="" type="radio"/>	SCROWXXX	Sheryl	Crow	brooke.stice@state.or.us	503-934-0118
<input type="radio"/>	MJAGGERX	Mick	Jagger	brooke.stice@state.or.us	503-934-0118
<input type="radio"/>	DARIMOON	Brooke	Stice	brooke.stice@state.or.us	503-934-0118

Add User Edit User Remove User

## 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.



The screenshot shows the 'Existing User' form. At the top, there are tabs for 'New User' and 'Existing User'. The 'Existing User' tab is selected. The form contains several input fields: 'My Oregon State Bar Number is:', 'User Id', 'First Name', 'Middle Initial', 'Last Name', 'Email Address', and 'Phone:'. Below these fields are three sections: 'Application Access:', 'Hearing Request', 'Request for Board Review', and 'WCB Case Status'. Each section has a 'Manage Users' checkbox and an 'Application Information' box. The 'Application Information' boxes provide details about the access level and a contact email for assistance. At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'My Oregon State Bar Number' field.

New User Existing User

My Oregon State Bar Number is:

User Id

First Name

Middle Initial

Last Name

Email Address

Phone:   ext.

**Application Access:**

**Hearing Request**

Hearing Request Individual User Access ☐

Hearing Request Read Only ☐

Hearing Request Update ☐

☐ Manage Users

**Application Information:**

Provides access to view and create requests for WCB hearings.

For Assistance Contact:

[portal.wcb@state.or.us](mailto:portal.wcb@state.or.us)

**Request for Board Review**

Board Review Request Individual User Access ☐

Board Review Request Read Only ☐

Board Review Request Update ☐

☐ Manage Users

**Application Information:**

Provides access to view and create requests for Board review.

For Assistance Contact:

[portal.wcb@state.or.us](mailto:portal.wcb@state.or.us)

**WCB Case Status**

WCB Case Inquiry Read Only ☐

☐ Manage Users

**Application Information:**

Provides access to view case information when your entity is a party of the case.

For Assistance Contact:

[portal.wcb@state.or.us](mailto:portal.wcb@state.or.us)

- 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.

Remove selected user.

First Name: Mick  
Last Name: Jagger  
User ID: MJAGGERX  
E-Mail Address: brooke.stice@state.or.us

**Hearing Request**

☒ Hearing Request Individual User Access  
☐ Hearing Request Read Only  
☐ Hearing Request Update

**Request for Board Review**

☒ Board Review Request Individual User Access  
☐ Board Review Request Read Only  
☐ Board Review Request Update

**WCB Case Status**

☒ WCB Case Inquiry Read Only

**Application Information:**  
Provides access to view and create requests for WCB hearings.  
For Assistance Contact:  
portal.wcb@state.or.us

**Application Information:**  
Provides access to view and create requests for Board review.  
For Assistance Contact:  
portal.wcb@state.or.us

**Application Information:**  
Provides access to view case information when your entity is a party of the case.  
For Assistance Contact:  
portal.wcb@state.or.us

Remove User Cancel Changes

## 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.

What is a contact?

Name Title	Email Address
Brooke Stice	brooke.stice@state.or.us
Elmer Fudd, Atty	brooke.stice@state.or.us
Elmer Fudd, Legal Assistant	bugs.bunny@lawgroup.com
Mark Bancik	mark.j.banick@state.or.us

Add Contact Edit Contact Remove Contact

- 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.

The top screenshot shows the 'Contact Detail' screen for 'Mac Fleetwood'. It includes fields for Name and Title, Address Line 1, Address Line 2, City, State, ZIP, and Email Address. Below these are fields for Area Code, Prefix, Suffix, and Ext. The bottom screenshot shows the 'Receive Notices About' screen, which has sections for 'Hearing Request' and 'Request for Board Review'. Each section contains several checkboxes for selecting notifications to receive. A 'Save' button is at the bottom of the second screen.

## Contact History

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

The screenshot shows the 'Contact History' screen for the contact 'drehermc@cbs.state.or.us'. It displays a table of notifications received, with columns for 'Date' and 'Subject'. The notifications are listed in chronological order, with the most recent at the top. The first notification is dated 01/13/2014 and is titled 'Acknowledgment of Request For Hearing Received For Dole'. The second notification is dated 01/03/2014 and is titled 'Oregon Workers' Compensation Board Request for Board Review Received'. The third notification is dated 01/03/2014 and is titled 'Oregon Workers' Compensation Board Request for Board Review Received'. The fourth notification is dated 12/31/2013 and is titled 'Oregon Workers' Compensation Board Request for Board Review Received'. The table is followed by a detailed view of the selected notification, which includes the full text of the email received.

Date	Subject
01/13/2014	Acknowledgment of Request For Hearing Received For Dole
01/03/2014	Oregon Workers' Compensation Board Request for Board Review Received
01/03/2014	Oregon Workers' Compensation Board Request for Board Review Received
12/31/2013	Oregon Workers' Compensation Board Request for Board Review Received

Your Request For Review has been received on 12/31/2013 01:59 p.m. for CLAIMANT, TEST (claim number: ABC) 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:

- LIBERTY BANK  
PO BOX 10348  
EUGENE, OR 97440

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

- SAIF CORPORATION  
400 HIGH ST SE  
SALEM, OR 97312

Thank you for using the WCB web portal.

## 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.

### Receive Notices About:

#### Hearing Request:

Hearing Notice: Receive Hearing Notices by email ☐

Hearing Request: Hearing scheduled / rescheduled \* ☒

Hearing Request: Notice of Request for Hearing sent to parties \* ☒

Hearing Request: Notification of filing \* ☒

Hearing Request: Receipt of filing \* ☒

Other Notifications: Approved CDA \* ☒

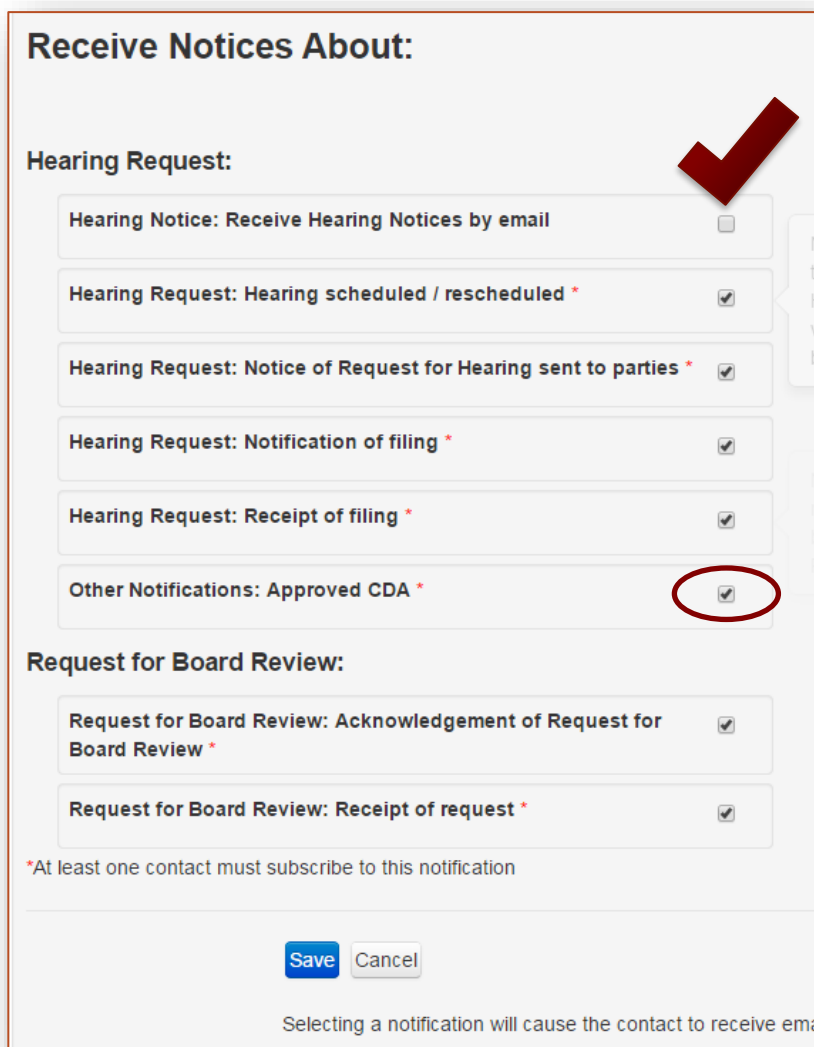
#### Request for Board Review:

Request for Board Review: Acknowledgement of Request for Board Review \* ☒

Request for Board Review: Receipt of request \* ☒

\*At least one contact must subscribe to this notification

Selecting a notification will cause the contact to receive email



# 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

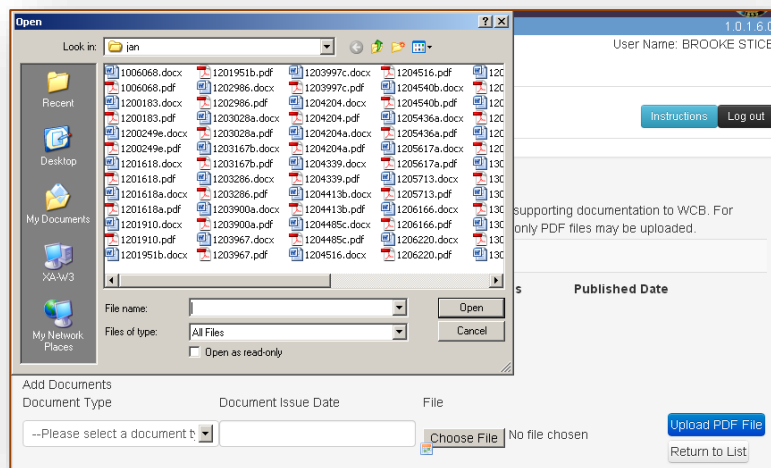
If you click on **View Request**, a document will load that looks exactly like the paper version of the current Request for Hearing.

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

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 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.





## 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:

List Requests Request Hearing Additional Docs History

Please upload any additional supporting documentation, or use this [cover sheet](#) to mail supporting documentation to WCB. For questions about electronic signatures, please refer to OAR 438-005-0046 (4) (c). Note: only PDF files may be uploaded.

**Existing Documents**

Document Type	Document Date	File Name	Upload Status	Published Date
No existing documents				

Add Documents

Document Type Document Issue Date File

--Please select a document-- Choose File No file chosen Upload PDF File Return to List

A hearing is requested for the reason(s) checked below

☐ DENIAL (date) Defacto

☐ Compensation - complete claim denial

☐ Partial Denial after a Claim Acceptance

☐ Challenge to Notice of Claim Acceptance

☐ Worker Noncooperation

☐ Aggravation

☐ Responsibility

☐ Medical Services

☐ NONCOMPLYING EMPLOYER ORDER

☐ TEMPORARY DISABILITY

☐ Temporary Disability Rate

☐ Procedural Temporary Disability

☐ Supplemental Disability

Period Sought to

☐ ORDER ON RECONSIDERATION attach PDF copy Choose File No file chosen

☐ Classification (disabling/non disabling)

☐ Premature Closure

☐ Substantive Temporary Disability

Period Sought to

☐ Permanent Partial Disability

☐ Permanent Total Disability

☐ OTHER (Explain and cite ORS)

☐ DIRECTOR'S ORDER attach PDF copy Choose File No file chosen

☐ PENALTY (cite ORS)

☐ ATTORNEY FEE (cite ORS)

☐ COSTS

☐ TEMPORARY DISABILITY OFFSET

☐ Yes ☐ No INTERPRETER WILL BE NEEDED For Language: --If Yes, Select a Language Other

☐ Yes ☐ No The amount in controversy is LESS than \$1000.

☐ Yes ☐ No All day is required for hearing.

☐ Yes ☐ No Stress claim (Such claims will be set for all day unless otherwise requested)

☐ Yes ☐ No Compensation stayed (Employer/insurer appeal of WCD Reconsideration Order)

Please consolidate this request for hearing with the following pending case(s) regarding this claim or claimant: WCB Case No(s)

☐ Yes ☐ No

Comments

Save Work in Progress

**Existing Documents**

Document Type	Document Date	File Name	Upload Status	Published Date
No existing documents				

Filing and Service of Documents; Correspondence; Signatures (OAR 438-005-0046)

Submit Request

[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.

List Requests Request Hearing Additional Docs History

Must cite ORS, if Penalty issue is checked.

Must cite ORS if Attorney Fee issue is checked.

WCB # N/A

Requested by \*

☐ Attorney/Claimant

☐ Claimant

☐ Insurer/Processing Agent

☐ Employer

☐ DCBS

**NOTICE TO OPPOSING PARTY:**

The requester demands copies of all medical reports and all other documents pertaining to this claim, whether or not the requesting party intends to rely on them at hearing.

**\*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.

The screenshot shows a web form for a Request for Hearing. At the top, there are checkboxes for 'PENALTY (cite ORS)', 'ATTORNEY FEE (cite ORS)', 'COSTS', and 'TEMPORARY DISABILITY OFFSET'. Below these is a section titled 'INTERPRETER WILL BE NEEDED For' with a dropdown menu and a 'Language' field. There are several 'Yes' and 'No' radio button options for various criteria like 'The amount in controversy is LESS than \$1000', 'All day is required for hearing', 'Stress claim', and 'Compensation stayed'. A 'Comments' text area is also present. At the bottom of the form, the 'Save Work In Progress' button is circled in red. Below the form is a table of 'Existing Documents' with columns for Document Type, Document Date, File Name, Upload Status, and Published Date. The table shows a 'COVER LETTER' document from 02/03/2014. At the very bottom, there are 'Submit Request' and 'Delete Incomplete Request' buttons.

## 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.

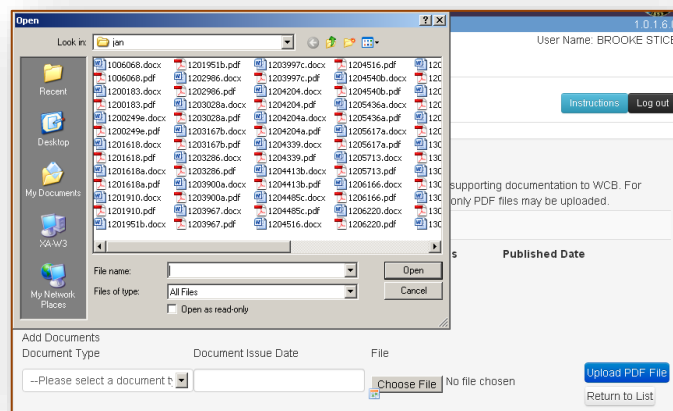
The screenshot shows an email from 'portal.wcb@state.or.us' with the subject 'Acknowledgement of Request for Hearing Received For Bellish'. The email body states: 'Your Amended Request for Hearing has been received on 01/30/2014 04:26 p.m. for Bellish, Maddison (insurer claim number: aaa) and is being processed. Parties with accounts on the WCB web portal are automatically notified when named on a Request for Hearing. The following parties do not have accounts on the WCB web portal and it is your responsibility to notify them of this Amended Request for Hearing:'. It lists two parties: 1. Maddison Bellish, 3277 JAY, Salem, OR 97303; 2. NORPAC FOODS INC, PO BOX 458, STAYTON, OR 97383. The email provides two links: one to generate a Request for Hearing sheet and another to generate a prefilled Cover Letter and Certificate of Service. It also lists two parties who do have accounts and will be notified: 1. SAIF CORPORATION, 400 HIGH ST SE, SALEM, OR 97312; 2. SAIF LEGAL SALEM, 400 HIGH ST SE, SALEM, OR 97312. The email ends with '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.

## 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.

Workers' Compensation Board Portal - Request for Hearing - Hearing History				
Entity Name: A DUANE PINKERTON II				
<a href="#">Home</a>	<a href="#">Request For Hearing</a>	<a href="#">Board Review Request</a>	<a href="#">WCB Case Status</a>	
<a href="#">List Requests</a>	<a href="#">Request Hearing</a>	<a href="#">Additional Docs</a>	<a href="#">History</a>	
Request Date	Claimant Name	WCB #	Change Date	
02/03/2014	Bellish, Maddison		2014-02-03 17:26:41.0	<a href="#">View Request</a>
01/30/2014	Bellish, Maddison		2014-01-30 16:26:41.0	<a href="#">View Request</a>

# 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.

List Requests

Request Form

Displaying 1 - 10 (88 total)

< Prev | Next 10 >

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

## 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.

List Requests

Request Form

Requested By \*

☒ Claimant
 ☐ Employer
 ☐ Insurer Processing Agent

Requested Type \*

☐ Request For Review
 ☒ Cross Request For Review

Case Information

WCB Case #

Claim #

Date of Injury

WCD #

Claimant First Name

Claimant Middle Name

Claimant Last Name

Claimant Suffix

Order Information

Administrative Law Judge Name

Order Date

Order Type

Order Description

Request Information

Reason for requesting the review

☐ Yes
 ☒ No
 Payment of compensation by the ALJ's order will be stayed under ORS 656.313 \*

Attorney Name

Oregon State Bar Number

Filing and Service of Documents; Correspondence; Signatures (OAR 438-005-0046)

Submit Request

Save Work In Progress

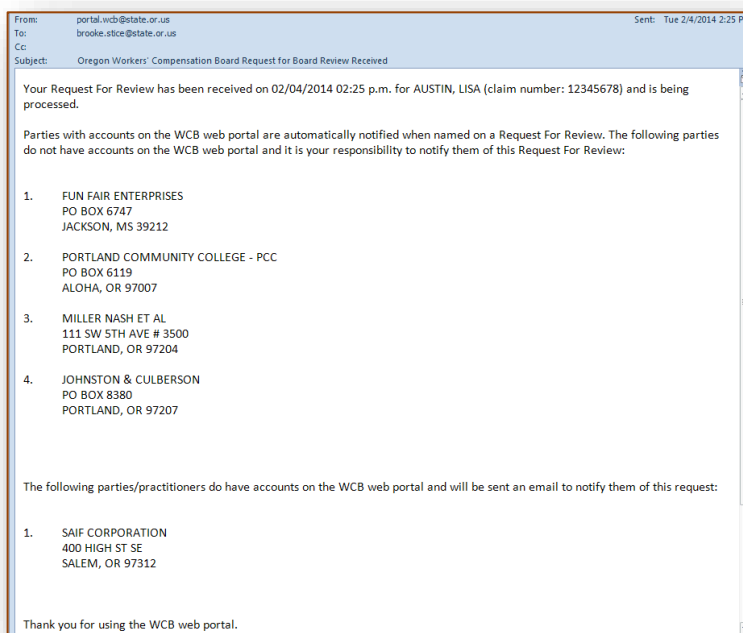
The required information that must be entered is the WCB Case #, Date of Injury, Claimant First Name, and Claimant Last Name.

- 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.



## 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.

List Requests Additional Docs Instructions Log out

Please upload any additional supporting documentation, or use [this cover sheet](#) to mail supporting documentation to WCB. For questions about electronic signatures, please refer to [OAR 438-005-0046 \(4\) \(c\)](#). Note: only PDF files may be uploaded.

Existing Documents	Document Type	Date	File Name	Upload Status	Publish Document	Delete Document	View
CERTIFICATE OF SERVICE	02/04/2014	1203900a.pdf	PROCESSED	<b>Publish Document</b>	Delete Document	View	

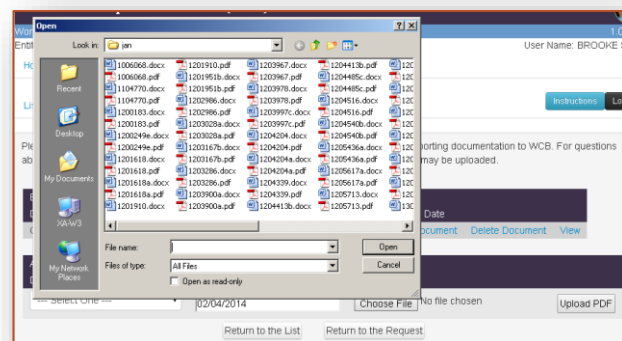
Add Document

Document Type: --- Select One --- Document Issue Date: 02/04/2014 File: Choose File No file chosen Upload PDF

Return to the List Return to the Request

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

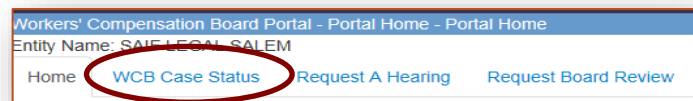
Once you've selected the document and pressed open, it will appear in the portal screen. Press **Upload File** to upload the document to the WCB portal.



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 filter (search) area has been reduced to one box. You can filter by all or part of the following:

- Claimant Name
- Claim Number
- WCB Case Number
- Attorney Name **NEW**

Open Cases Closed Cases

Sort By: In Progress -> Processed

ABBE, BRAD A  
09-02787C  
Open

ABBEY, JEFFREY L  
12-00747  
Open

Old look and feel for filtering information.

Sort By: In Progress -> Processed

- Last Name Asc
- Last Name Desc
- Last Action Date Asc
- Last Action Date Desc
- Case Number Asc
- Case Number Desc

The default search order can be set to:

Filter By

Claimant First Name Middle Initial Last Name Insurer Claim Number WCB Case Number Date of Injury

Displaying 1 - 15 (107828 total) < Prev Next 15 >

Request Date	Claimant	WCB Case #	Request Status	Hearing Location	Hearing Date	Order Date	Order Type	Issues	ALJ
02/09/2015	HALLANGER, BRENDA	15-00633	Processed	PORTLAND	12/03/2014			AXSTW	
02/09/2015	HALL, DARCEY B	15-00010MN	Scheduled	SALEM	03/27/2015			Q	

- 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.

Workers' Compensation Board (WCB)

Workers' Compensation Board Portal - WCB Case Status

Entity Name: A GREGORY MCKENZIE & ASSOC User Name: KRISTI IVERS

Home WCB Case Status Request a Hearing Request Board Review

Instructions Log out

Open Cases Closed Cases

Sort By: In Progress -> Processed

BOYD, LECIA S  
00-07405  
Closed

Case information

Further detail is provided in three tabs (events, status, and orders & documents).

Events Status Orders and Documents

Event Date	Status	Type	Location
WED 01/03/2001 09:00 AM	CANCELLED	Hearing	PORTLAND

Case Information

WCB Case #: 00-07405

WCD #: D968183

Claimant: BOYD, LECIA S

Claim #: 8903123

Date of Injury: 06/14/2000

Interpreter: No

Issues:

ALJ: UNASSIGNED  
(503) 378-3308

Report Cancellations and Online Services

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

Your session will expire in 57 minutes if you remain on this page.

ADCOOK, DONNA  
14-02682  
Open

Case Information

Events Status Orders and Documents

Event Date	Status	Type	Location
THU 10/16/2014 09:30 AM	HELD	Mediation	PORTLAND
MON 08/18/2014 09:00 AM	CANCELLED	Hearing	PORTLAND

Case Information

WCB Case #: 14-02682

WCD #: HBP1590

Claimant: ADCOOK, DONNA

Claim #: 8269350E

Date of Injury: 09/23/2013

Interpreter: No

Issues: ALJ: BETHLAHMY  
(971) 673-0900

Report Cancellations and Online Services

Parties

Type	Name	Address	Phone Number
Claimant	DONNA ADCOOK	4018 NE 67TH AVE PORTLAND OR 97213	
Claimant Firm	WELCH BRUUN & GREEN	4380 SW MACADAM AVE STE 120 PORTLAND OR 97239	(503) 221-0870
Claimant Atty	MARYBETH WOSKO	SAME ADDRESS AND PHONE AS FIRM	
Ins/TPA	SAIF CORPORATION	400 HIGH ST SE SALEM OR 97312	(503) 373-8000
Ins Firm	SAIF LEGAL SALEM	400 HIGH ST SE SALEM OR 97312	(503) 373-8000
Ins Atty	KEVIN M BARRETT	SAME ADDRESS AND PHONE AS FIRM	
Employer-Care of Insurer (N)	BALL JANIK LLP	101 SW MAIN ST STE 1100 PORTLAND OR 97204	



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

Events   Status   Orders and Documents		
Date	Order/Document	
09/17/2013	ORDER ON REMAND	<a href="#">View</a>
08/15/2013	COURT OF APPEALS DECISION	<a href="#">View</a>
05/19/2011	ORDER ON REMAND	<a href="#">View</a>
05/10/2011	ORDER ON REMAND	<a href="#">View</a>
06/04/2010	COURT OF APPEALS DECISION	<a href="#">View</a>
06/13/2007	ORDER ON REVIEW	<a href="#">View</a>
01/09/2007	ISSUED OPINION AND ORDER	<a href="#">View</a>

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

10 records per page										Filter
Request Date	WCB Case #	Claimant	Req. Status	Order Date	Order Type	Order Description				
01/29/2015	12-00003	CAIN, JULIE A	Submitted							
Showing 1 to 1 of 1 entries										
<a href="#">Click to Show Previous Requests</a>										

Choosing "Click to Show Previous Requests" brings up old requests with their own filtering and pagination system.

10 records per page										Filter
Request Date	WCB Case #	Claimant	Req. Status	Order Date	Order Type	Order Description				
01/29/2015	12-00003	CAIN, JULIE A	Submitted							
Showing 1 to 1 of 1 entries										
<a href="#">Click to Hide Previous Requests</a>										
10 records per page										
Request Date	WCB Case #	Claimant	Req. Status	Order Date	Order Type	Order Description				
02/18/2013	12-04372	ZUNIGA-ORTIZ, JUAN	Order Issued	07/16/2013	Board Order	ORDER ON REVIEW				<a href="#">Cross-Request</a>
02/27/2013	12-05155	Wiggins, Keith J	Order Issued	08/13/2013	Board Order	ORDER ON REVIEW				<a href="#">Cross-Request</a>
03/19/2013	12-05683, 12-05714	Goodman, Cobey	Order Issued	08/13/2013	Board Order	ORDER ON REVIEW				<a href="#">Cross-Request</a>

An example of a screen displaying previous requests.

- 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

Home WCB Case Status Request A Hearing Request Board Review

List Requests New Hearing Request

10 records per page

Request Date	Claimant	WCB Case #	Request Type	Request Status	Hrng/Evnt Loc	Hrng/Evnt Date		
	Re-request, Rere Rere, Sr		Original	Incomplete				
12/31/2014	Doe, Jane		Original	Submitted				
12/31/2014	Doe, John		Original	Submitted				
01/12/2015	ReqLast, ReqFirst MName, Sr		Original	Submitted				

Showing 1 to 4 of 4 entries

Click to Show Previous Requests

Previous 1 Next

## WCB Settlement Documents

### How to upload settlement documents

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

Workers' Compensation Board (WCB)

Workers' Compensation Board Portal - External Settlement Area - Submit Settlement

Entity Name: ABF FREIGHT SYSTEM INC

Home WCB Case Status Request A Hearing Request Board Review View Settlement

Settlement Info New Settlement

Submit information for a case that is new to WCB

Insurer Claim Number

Claimant Last Name

a

b

Workers' Compensation Board (WCB)

Workers' Compensation Board Portal - WCB Case Status

Entity Name: A GREGORY MCKENZIE & ASSOC

Home WCB Case Status Request A Hearing Request Board Review View Settlement

Open Cases Closed Cases

Sort By: In Progress -> Processed

1 2 3 4 5

MERELLO, VICTOR  
13-0124566  
Open

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).

Workers' Compensation Board Portal - External Settlement Area - Submit Settlement  
Entity Name: ABF FREIGHT SYSTEM INC

Home WCB Case Status Request A Hearing Request Board Review View Settlement

Settlement Info New Settlement

Submit information for a case that is new to WCB

Insurer Claim Number

Claimant Last Name

Claimant First Name

Date of Injury

Continue

Upload DO Your session will expire in 55 minutes if you remain on this page.

WCB Case Number

Insurer Claim Number

Date of Injury

Claimant Last Name

Claimant First Name

Claimant Address

Employer

Insurer Firm

TPA

Defense Atty Firm

Claimant Atty Firm

Please list all WCB case numbers this settlement applies to:

Special Instructions, Corrections & Comments (e.g. address changes):

c 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.

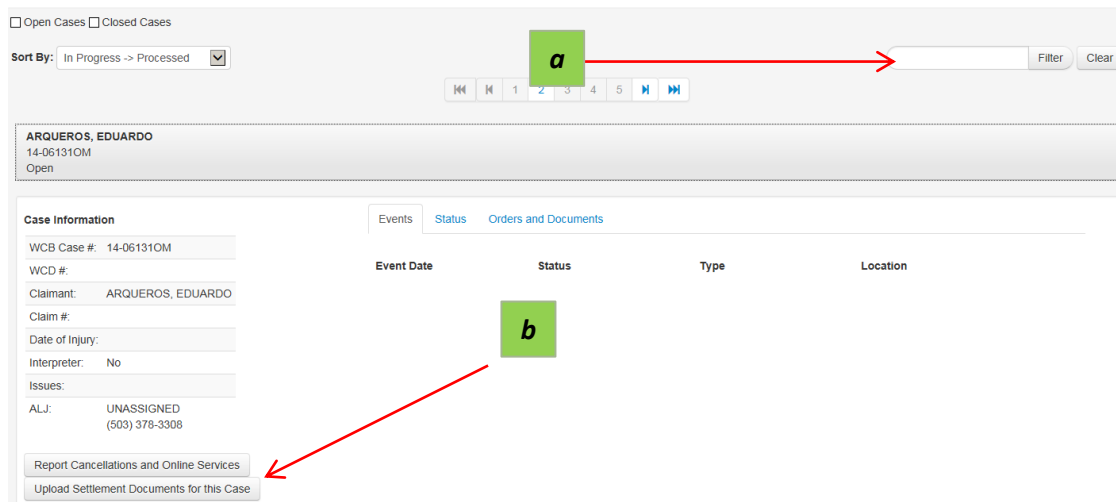
- Click the “*save*” button to save the work you have done.
- The screen will refresh, showing the names of the documents you have attached. WCB does not require any specific protocol for naming your files. You can view or delete those documents by clicking on the icons on the right.
- When you are done 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

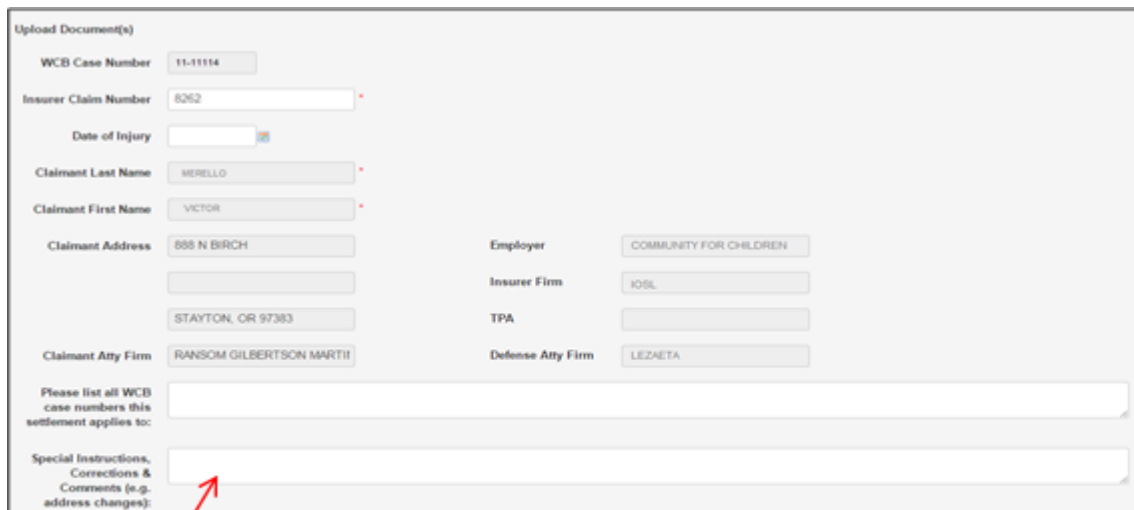
### A. Existing Case

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)



The screenshot shows the WCB Case Status interface. At the top, there are checkboxes for "Open Cases" and "Closed Cases". Below them is a "Sort By:" dropdown menu set to "In Progress -> Processed". To the right is a search filter box labeled (a) with a red arrow pointing to it. Below the filter box is a pagination bar showing "1 2 3 4 5" with "2" selected. The main content area displays case information for "ARQUEROS, EDUARDO" with WCB Case # 14-061310M and status "Open". Below this is a tabbed interface with "Events", "Status", and "Orders and Documents" tabs. The "Status" tab is active, showing a table with columns "Event Date", "Status", "Type", and "Location". Below the table is a green box labeled (b) with a red arrow pointing to the "Upload Settlement Documents for this Case" button at the bottom left.

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



The screenshot shows the "Upload Document(s)" dialog box. It contains several input fields for case and party information: "WCB Case Number" (11-11114), "Insurer Claim Number" (6262), "Date of Injury" (calendar icon), "Claimant Last Name" (MERELLO), "Claimant First Name" (VICTOR), "Claimant Address" (888 N BIRCH, STAYTON, OR 97383), "Employer" (COMMUNITY FOR CHILDREN), "Insurer Firm" (IOSL), "TPA" (empty), "Claimant Atty Firm" (RANSOM GILBERTSON MARTII), and "Defense Atty Firm" (LEZAETA). At the bottom, there are two text areas: "Please list all WCB case numbers this settlement applies to:" and "Special Instructions, Corrections & Comments (e.g. address changes):". A red arrow points to the second text area, which is labeled "Dialog box" in red text below the form.

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

The screenshot shows a web interface for uploading documents. At the top, there's a 'records per page' dropdown set to 10. Below this is a tabbed interface with tabs for 'Settlement Documents', 'CDA', 'DCS', 'Stip', 'Cover Letter', 'Addendum', 'Retainer', and 'Other'. The 'Settlement Documents' tab is active. A table below the tabs shows a single row with a 'Record Not Saved' status and a 'WindEnergyMFGSupplierHandbook.pdf' file. To the right of the table is an 'Upload PDF' button. Below the table is an 'Add Another Document' button, labeled with a green box 'c'. At the bottom of the interface, there are buttons for 'Save', 'Submit for Processing' (labeled with a green box 'e'), 'Delete Submission', and 'Return To List'. A red arrow points from box 'd' to the 'Upload PDF' button. A red arrow points from box 'e' to the 'Submit for Processing' button. A red arrow points from box 'c' to the 'Add Another Document' button. A message at the bottom states: 'Any changes made will be lost unless saved.'

## Status Screens

### C. Status Screens

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

The screenshot displays three sections of the 'Settlement Info' status screen. The top section is labeled 'New' with a red arrow pointing to it. It shows a table with columns: Claimant Name, Insurer Claim Number, DOI, Document Types, and Submission Status. A single row is visible for 'Merello, Victor' with status 'Not Submitted'. The middle section is labeled 'In Process at the Board' with a red arrow pointing to it. It shows a table with the same columns. Five rows are visible, all with status 'In Progress'. The bottom section is labeled 'Archive' with a red arrow pointing to it. It shows a table with the same columns, but the status is 'Not Submitted'. A message at the bottom of the 'Archive' section states: 'No data available in table.'

- 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).

New					
10 records per page					
Claimant Name	Insurer Claim Number	DOI	Document Types	Submission Status	
EDUARDO ARQUEROS	12345SSD	12/01/2010		NOT SUBMITTED	Resume Delete
Showing 1 to 1 of 1 entries					
Previous 1 Next					

- 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.

In Process at the Board					
10 records per page					
Claimant Name	Insurer Claim Number	DOI	Document Types	Submission Status	
Merello, Victor	8237435C		STIP	In Progress: 12/11/2015	View
Merello, Victor	8263159C	07/11/2013	CDA	In Progress: 11/23/2015	View
Bertero, Carlos	8304807G		CDA, DCS	In Progress: 12/11/2015	View
Trobianni, Marcelo	8299706G	06/16/2014	CDA	In Progress: 11/23/2015	View
Obi One Hernandez	8331795G	04/05/2015	CDA	In Progress: 11/23/2015	View
Showing 1 to 5 of 5 entries					
Previous 1 Next					

- 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.

Archive					
10 records per page					
Claimant Name	Insurer Claim Number	WCB Number	DOI	Document Types	Submission Status
No data available in table					
Showing 0 to 0 of 0 entries					
Previous Next					

## 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.

The screenshot displays the 'Workers' Compensation Board (WCB)' portal interface. At the top, there's a navigation bar with links: Home, WCB Case Status, Request A Hearing, Request Board Review, and View Settlement. Below this is a secondary navigation bar with links: Main, Users, Contacts, and Company. The 'Users' link is highlighted. The main content area shows a table titled 'User List' with columns for 'Logon ID' and 'First Name'. A single user is listed: 'ANNAX33' with the first name 'ANNA, MILITZA'. The 'User Detail' link is also visible.

Logon ID	First Name
ANNAX33	ANNA, MILITZA

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.

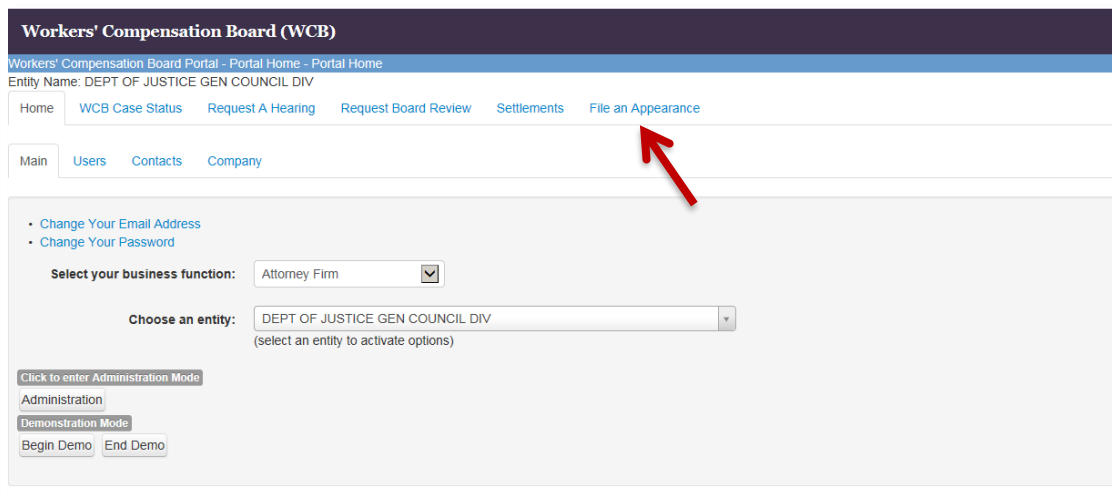


5. Only the original submitter can change or add documents to a settlement submission. If you are not the submitter and wish to upload an addendum, for example, you must arrange to have the original submitter send it through their portal account. However, all portal parties will be able to view the submitted 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



Workers' Compensation Board (WCB)

Workers' Compensation Board Portal - Portal Home - Portal Home

Entity Name: DEPT OF JUSTICE GEN COUNCIL DIV

Home WCB Case Status Request A Hearing Request Board Review Settlements **File an Appearance**

Main Users Contacts Company

• Change Your Email Address  
• Change Your Password

Select your business function: Attorney Firm

Choose an entity: DEPT OF JUSTICE GEN COUNCIL DIV  
(select an entity to activate options)

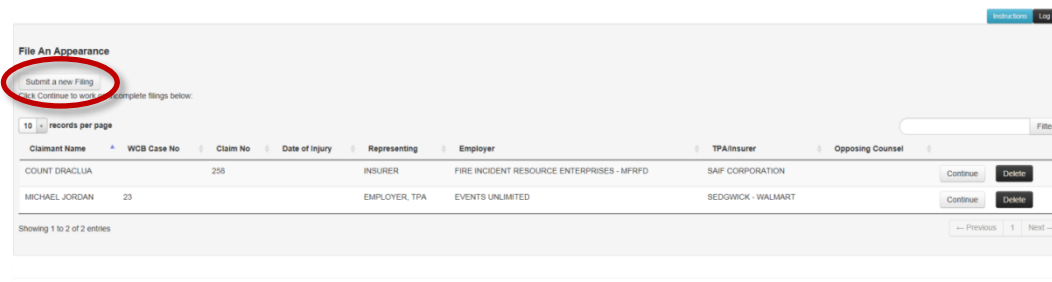
Click to enter Administration Mode

Administration

Demonstration Mode

Begin Demo End Demo

### 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.”



File An Appearance

Submit a new Filing

Click Continue to work on complete filings below:

10 records per page

Claimant Name	WCB Case No	Claim No	Date of Injury	Representing	Employer	TPA/Insurer	Opposing Counsel	
COUNT DRACULA		255		INSURER	FIRE INCIDENT RESOURCE ENTERPRISES - MFRPD	SAIF CORPORATION		Continue Delete
MICHAEL JORDAN	23			EMPLOYER, TPA	EVENTS UNLIMITED	SEDGWICK - WALMART		Continue Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

- 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 assigned 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.

	Admits	Denies	No Response	
(ABX)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	That claimant has a compensable injury/disease or new/omitted condition.
(Z)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	That the notice of acceptance is inaccurate.
(V)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	That claimant has cooperated with the claim investigation.
(K)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	That claimant has sustained an aggravation.
(L)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	That the employer is responsible.
(C)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	That claimant is entitled to medical services.

- 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.

Please review the information below.

Attorney of Record	BRIAN M PERKO
OSB #	783365
Representing	EMPLOYER
WCB Case Number	123
Claimant Name	LUCKY CHARMS
Claim Number	
Date of Injury	11/01/2016
ALJ Name	DAVID D LIPTON
Employer	FRED MEYER STORES - KROGER CO - ATTN: RISK MANAGER
Insurer/TPA	TRAVELERS INS CO
Opposing Attorney	MOORE & JENSEN

**Response To Issues**

Response Type:

Claimant Name:  WCB Case Number:

Claim No:  Assigned ALJ:

Date of Injury:  Hearing Date:

In response to the issues raised by claimant, the insurer or self-insured employer:

	Admits	Denies	No Response
(ABX) That claimant has a compensable injury/disease or new/omitted condition.		X	
(Z) That the notice of acceptance is inaccurate.		X	
(V) That claimant has cooperated with the claim investigation.		X	

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

Your session will expire in 50 minutes if you remain on this page.

(T) X That claimant is entitled to an attorney fee (Cite ORS)

(W) X That claimant is entitled to costs

The Insurer or Self-Insured Employer hereby Cross-Appeals and Contends:

☐ That the award of temporary disability benefits is excessive.

☐ That the award of permanent disability benefits is excessive.

**Notice to Opposing Party:**

The responding party demands copies of all medical reports and all other documents pertaining to the claim regardless of whether the requesting party intends to rely on them at hearing.

Request an Interpreter:  Other:

If you need to modify the attorney of record for this case, use the Update Attorney of Record button on the WCB Case Status screen.

Attorney of Record:  Firm Name:  Submitted On:

OSB #:

For: ☐ Claimant ☐ Employer ☐ Insurer ☐ TPA

[Back](#) [Submit Both for Processing](#) [Submit File An Appearance Only, and Delete Response To Issue](#)

- 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.”

BOYD, LL  
00-07405  
Closed

Case Information

WCB Case #: 00-07405  
WCD #: D968183  
Claimant: BOYD, LECIA S  
Claim #: 8903123  
Date of Injury: 06/14/2000  
Interpreter: No  
Issues:  
ALJ: UNASSIGNED (503) 378-3308

Report Cancellations and Online Services  
Submit Response to Issues  
Update Attorney of Record  
Upload Settlement Documents for this Case

Parties

Type	Name	Address	Phone Number
Claimant	LECIA S BOYD	21430 N HWY 99W DUNDEE OR 97115	(503) 554-6708
Claimant Firm	UNREPRESENTED		
Claimant Atty			
Ins/TPA	JOHNSTON & CULBERSON	PO BOX 8380 PORTLAND OR 97207	(503) 697-3137
Ins Firm	DEPT OF JUSTICE - GCD-BAS	1162 COURT ST NE SALEM OR 97301	(503) 947-4342
Ins Atty	RAYMOND MYERS	SAME ADDRESS AND PHONE AS FIRM	
Employer-Care of Insurer (N)	HEMCARE OF OREGON INC	15495 SW MILLIKAN WAY BEAVERTON OR 97006	
Emp Firm	A GREGORY ICKENZIE & ASSOC	1919 WILLAMETTE FALLS DR WEST LINN OR 97068	(503) 650-1731
Emp Atty	NO ATTORNEY SPECIFIED		

## 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.

ABU-JAMOUS, MYRA  
15-02473  
Open

Case Information

WCB Case #: 15-02473  
WCD #: 89K3230  
Claimant: ABU-JAMOUS, MYRA  
Claim #: WCB02014720889  
Date of Injury: 09/16/2014  
Interpreter: No  
Issues: ODRSTW  
ALJ: UNASSIGNED (503) 378-3308

Report Cancellations and Online Services  
Continue Response to Issues  
Update Attorney of Record  
Upload Settlement Documents for this Case

Parties

Type	Name	Address	Phone Number
Claimant	MYRA ABU-JAMOUS	4096 SW GREENSBORO HWY # 136 BEAVERTON OR 97008	(503) 767-7548
Claimant Firm	MILLES LAW	8025 SW CASCADE AVE STE 400 BEAVERTON OR 97008	(503) 347-6417
Claimant Atty	CRAIG THOMAS MILLER	SAME ADDRESS AND PHONE AS FIRM	
Ins/TPA	TRUSTAR RISK ADJUST	PO BOX 3005 CLATSOP CO OREGON 97131-3005	(503) 345-7090

Events Status Orders and Documents **Pleadings**

Date	Type	Attachment
12/07/2016	RESPONSE TO ISSUES	<a href="#">View</a>
01/17/2017	RESPONSE TO ISSUES	<a href="#">View</a>
01/10/2017	UPDATE ATTORNEY OF RECORD	<a href="#">View</a>
12/07/2016	FILE AN APPEARANCE	<a href="#">View</a>

## 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](mailto: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](mailto: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](mailto:portal.wcb@wcb.oregon.gov).