

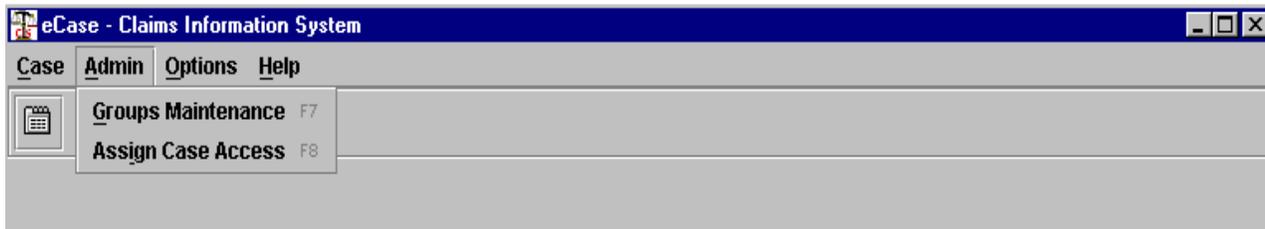
How to Use eCase Administration

Ability to Allow Access for All or Specific Cases to Specific Organizations or Individuals

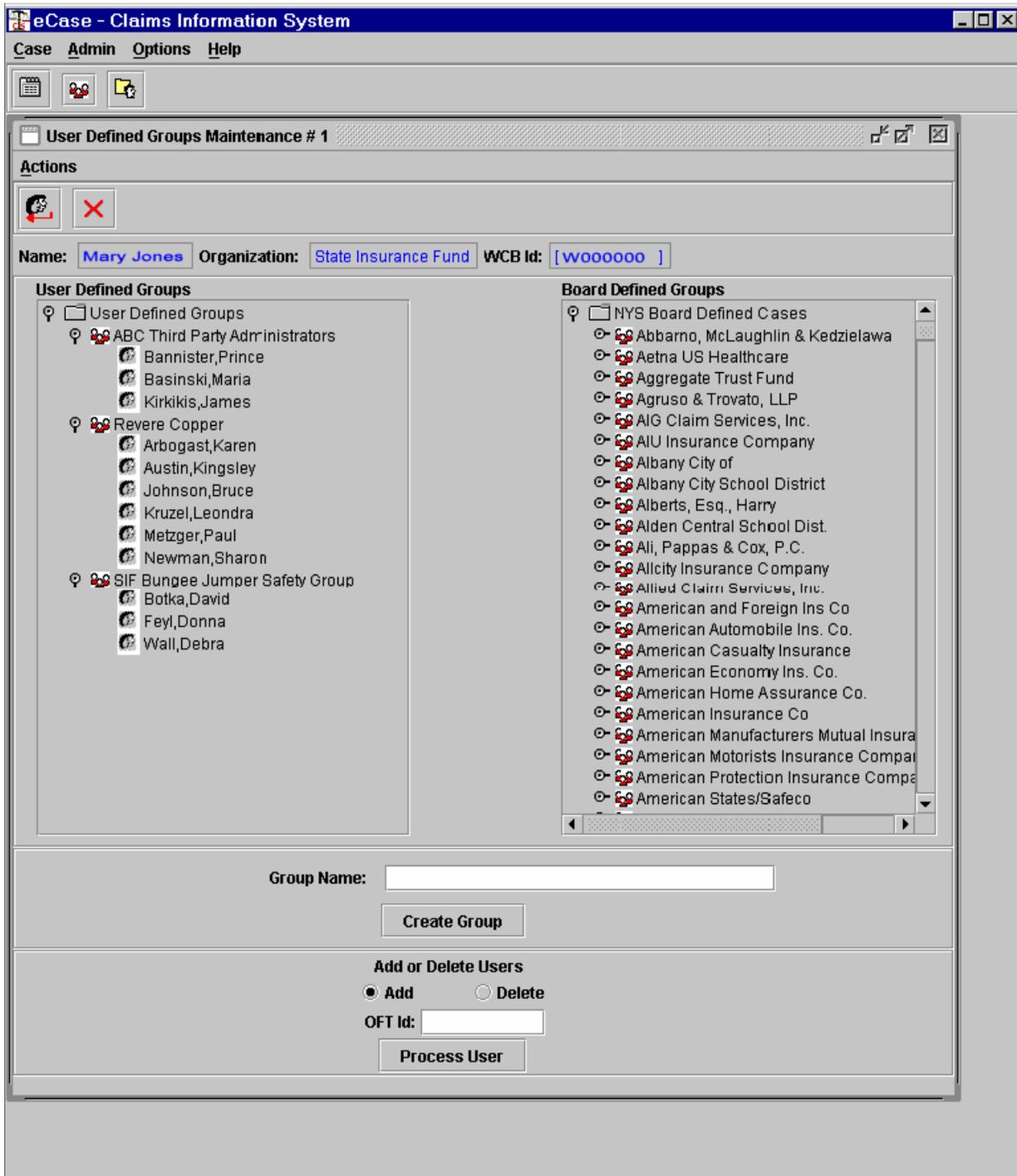
In order to allow organizations with Workers' Compensation Board issued IDs flexibility in using eCase and still maintain confidentiality of workers' compensation cases pursuant to Section 110-a of the Workers' Compensation Law, eCase allows organizations the ability to grant other organizations or individuals the permissions required for access to all or specific cases in eCase.

Prior to using this feature, all organizations must advise the Workers' Compensation Board of the name of their eCase Administrator.

eCase Administrators use the "Admin" Menu to which allows them to create and maintain groups and assign case access.



This window allows the eCase Administrator to create and maintain User Defined Groups.



To create a User Defined group, the eCase Administrator:

1. Log in to eCase

Note: the system automatically checks the Electronic Customer Database (ECR) and identifies the eCase Administrator..

2. Select Admin
3. Click Groups Maintenance
4. Type the name of the new group in the 'Group Name' field
5. Press 'Enter' key or click 'Create Group' button

To add members to the group:

1. Select the group to which you wish to add a member
2. Type the OFT Id of a user

Note: 'Add' is the default so this will add the user to the highlighted User Defined Group.

3. Press 'Enter' key or click 'Click "Process User"'

OR

4. Drag and Drop user names from the Board Defined Groups into the User Defined Group

Note: The normal windows functionality has been programmed and apply to the selection process. For example, holding the [ctrl] key while selecting with the mouse allows the selection of multiple items. Likewise, holding the [shift] key while selecting with the mouse allows the selection of multiple 'consecutive items'.

Note: At the end of a drag-drop operation, administrators **must click on the User Defined group** they wish to drop the dragged items to.

OR

5. Use the keyboard commands to move members ie: 'Ctrl-C' {Copy} and 'Ctrl-V' {Paste} to paste one or more Board Defined group members to their "User Defined Group".

To delete members from the group:

1. Select the group to which you wish to delete a member from
2. Type the OFT Id of a user
3. Select the individual
4. Click the 'Delete' button
5. Press 'Enter' key

OR

Right click to select appropriate option from the menu.



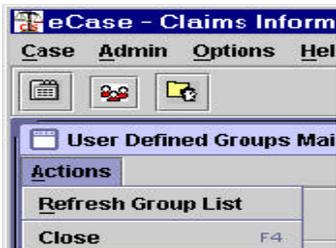
To delete an entire group:

1. Select the group to which you wish to delete
2. Right click to select appropriate option from the menu.



Actions Menu for User Defined Groups Maintenance window

The 'Actions' menu will allow you to "Refresh Group List" and "Close" the window.



Once the individual is added, access may be given at the group level or at the individual level.

Note: If a tighter degree of security is required, the eCase Administrator may give access at the individual level. If this is not necessary, group level access is sufficient.

To give access at the group level:

1. Click the small white selection box at the left of the group level name



Note: If eCase Administrator gives access at the group level, anyone in the group may view the cases. In addition, when granting access to an **entire** Board Defined Group, the eCase Administrator should understand that as employees are added to the Board Defined User Group, they will automatically have access to the cases that the eCase Administrator has given the group.

To give access at the individual level:

1. Click the “+” box at the group level
2. Click the individual name(s) to whom you wish to give access



There are three options the eCase Administrator can use to assign specific access to a group or an individual.

- **Access to individual cases** allows the Administrator to give access to only specific cases. This window allows the eCase Administrator to pick the group on the left side of the screen. On the right side, the Administrator can add or delete specific WCB Case Ids that the group will be allowed access.

Note: The administrator can only create case lists at the group level.



Case Access

Actions

Name: Organization: WCB Id:

Access to All Cases Access to Individual Cases Access to all BUT these Cases

Groups and Group Members

- Littman, Law Office of Peter N.
- Livingston County SI Plan
- Loblaw, Inc.
- Lockwood & Golden
- Lodico, William J.
- London Guarantee & Accident
- Long Beach, City of
- Long Island City Pain Mgmt & R
- Long Term Care Risk Mgmt
- Losi & Gangi
- Lovell Safety Management, Co.,
 - Charles, Geraldine
 - Doddato, Thomas
 - Glantz, Gary
 - Hesler, Patrick
 - Jackson, Omar
 - Labendz, Asher
 - Lovell, Barry
 - Macellari, Paula
 - Pena, Gloria
 - Pirro, Doreen
 - Ruocchio, Alfred
 - Ryan, Susan
 - Shiffrin, Harold
 - Sivori, Joann
- Lucent Technologies, Inc.
- Lumbermens Mutual Casualty C
- M & G Convoy Inc.
- Madison Oneida Herkimer

Cases Group May Access

Case ID	CLaimant Name	Carrier Case Id	Date
1111111	Jane Doe	111223344	4/9/1
9999999	John Smith		5/23/

Add or Delete Cases from Group

Add Delete

WCB CaseID:

To add cases that a group member or an entire group may access:

1. Enter the case number in the field provided
2. Press 'Enter' key or click 'Click "Process"'

To delete cases that the group may access:

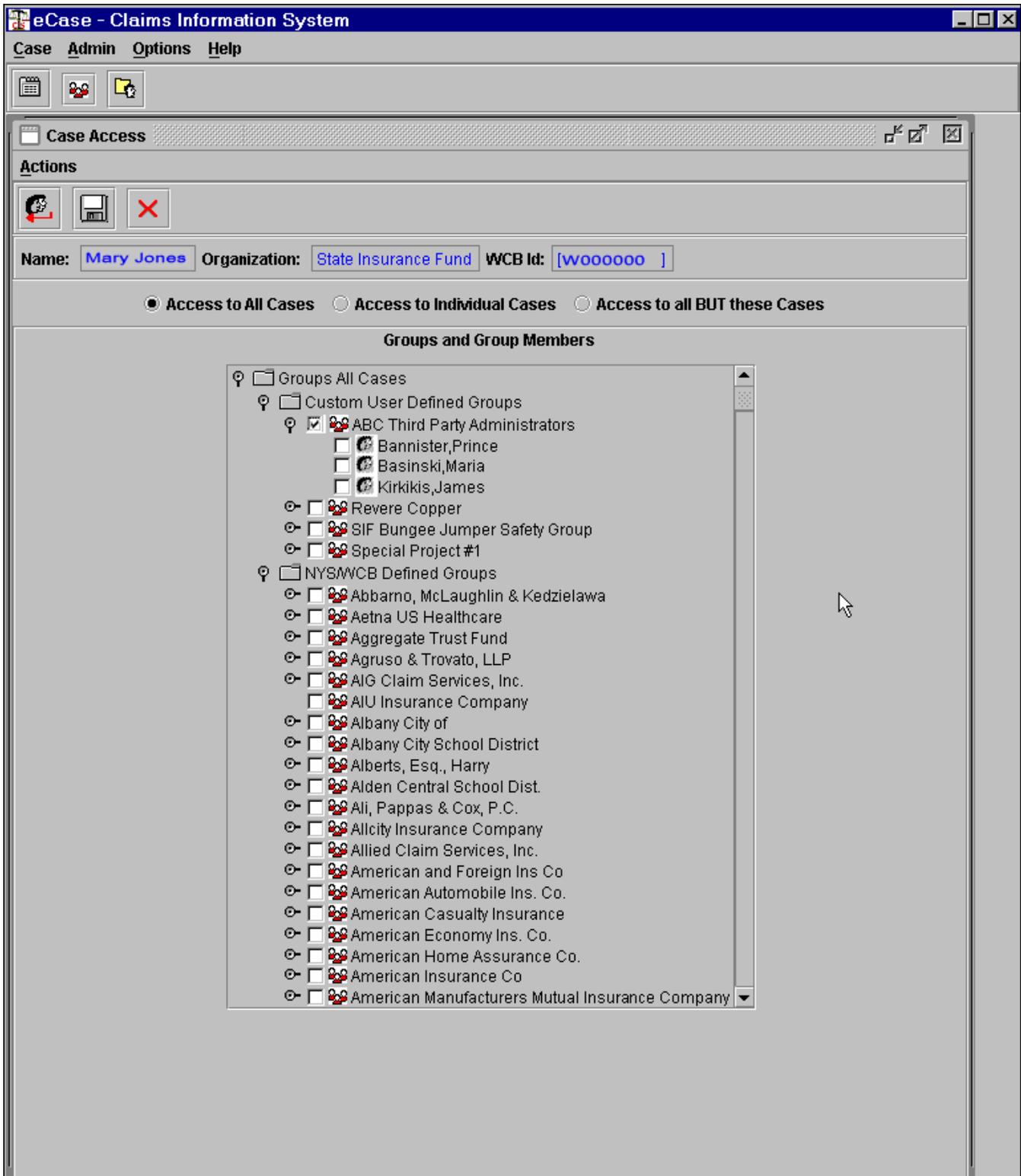
1. Enter Case Number
2. Click the "Delete" button
3. Press 'Enter' key or click 'Click "Process"'

Or

Right click and select "Delete Selected Cases" option from the menu.



- **Access to all cases** allows the Administrator to give access to all cases on which the organization is a party of interest. This is the same access that is currently given using the POI Id number.



- **Access to all BUT these cases** allows the administrator to choose certain cases that are not accessible, for example their own employees' cases. On the right side, the Administrator can add or delete specific WCB Case Ids that the group will be allowed access.

Note: The administrator can only create case lists at the group level.

The screenshot shows the 'eCase - Claims Information System' window. The 'Case Access' tab is active, displaying configuration for 'Mary Jones' at the 'State Insurance Fund' with WCB ID '[W000000]'. The 'Access to all BUT these Cases' radio button is selected. The interface is divided into two main sections: 'Groups and Group Members' on the left and 'Cases Group May NOT Access' on the right. The 'Groups and Group Members' section shows a tree view with 'Revere Copper' and 'SIF Bungee Jumper Safety Group' selected. The 'Cases Group May NOT Access' section contains a table with one entry: Case ID 12345678, Claimant Name Jane Doe, and Date of 5/23/19. At the bottom, there are controls to 'Add or Delete Cases from Group', with 'Add' selected, a text field for 'WCB CaseID', and a 'Process' button.

Case Access

Actions

Name: **Mary Jones** Organization: **State Insurance Fund** WCB Id: **[W000000]**

Access to All Cases Access to Individual Cases Access to all BUT these Cases

Groups and Group Members

- Groups Exception Cases
 - Custom User Defined Groups
 - ABC Third Party Administrators
 - Revere Copper
 - Arbogast, Karen
 - Austin, Kingsley
 - Johnson Bruce
 - Kruzal, Leondra
 - Metzger, Paul
 - Newman, Sharon
 - SIF Bungee Jumper Safety Group
 - Special Project #1
 - NYSWCB Defined Groups

Cases Group May NOT Access

Case ID	CLaimant Na...	Carrier Case ...	Date of
12345678	Jane Doe		5/23/19

Add or Delete Cases from Group

Add Delete

WCB CaseID:

Process

To add cases that a group member or an entire group may not access:

1. Enter the Case Number in the field provided
2. Press 'Enter' key or click "Process"

To delete cases that the group may not access:

1. Enter the Case Number
2. Click the "Delete" button
3. Press 'Enter' key or click "Process"

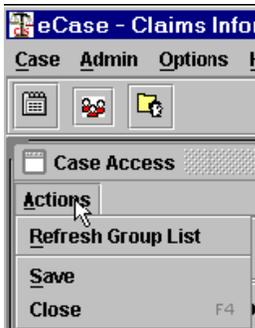
Or

Right click and select "Delete Selected Cases" option from the menu.



Actions Menu for Case Access window

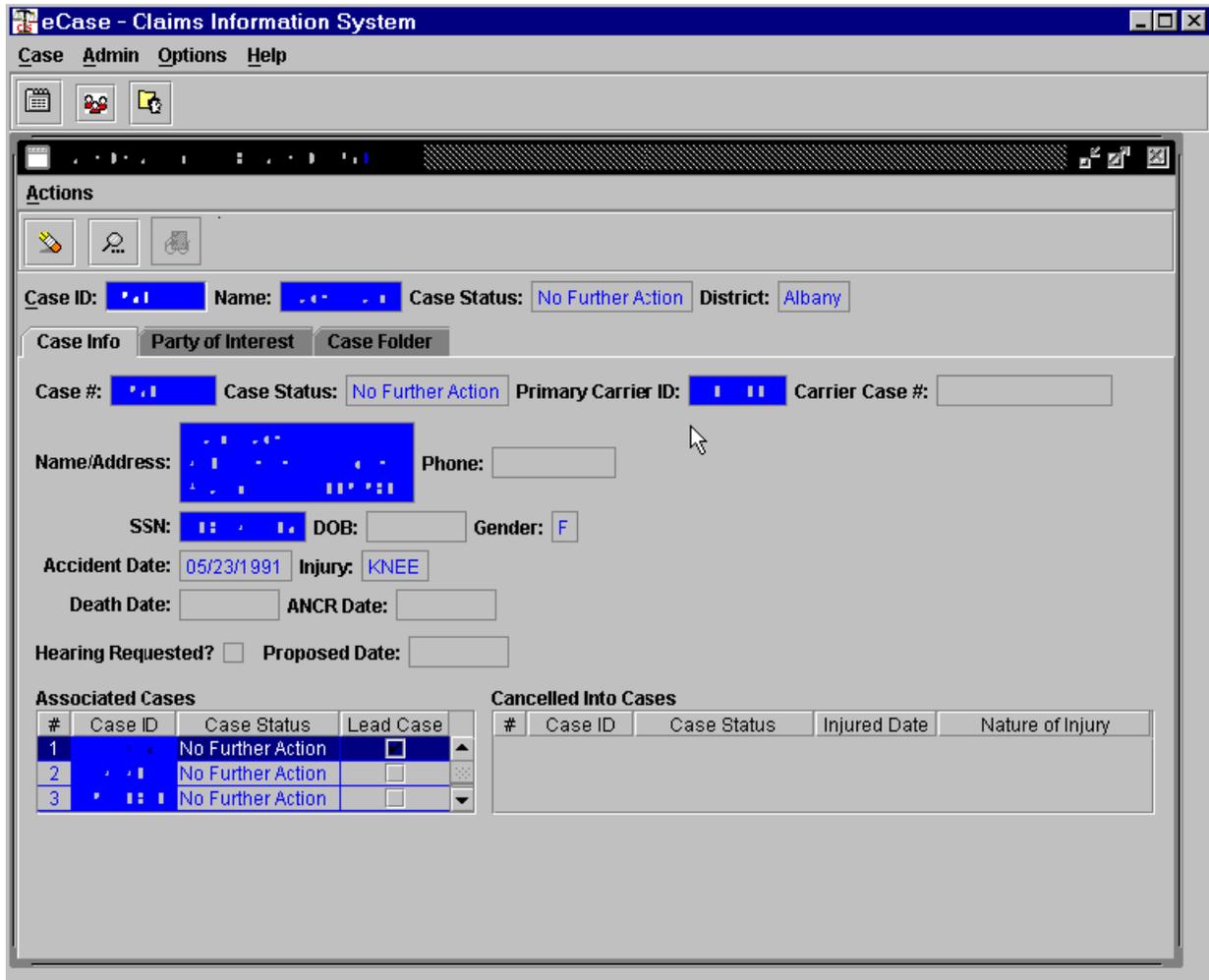
A new 'Actions' menu will allow you to "Refresh the Group List", "Save" the action and "Close" the window.



Other Points of Interest in eCase

- **The ability to look at more than one case at a time through the Associated Cases field.**

If you wish to see an associated case, it is no longer necessary to enter the new case number to open the case. You may now double click on an Associated Case Number on the lower left side of the screen to open the second case. You may then toggle between cases by using the new “Window” menu option.



- **Graphics in the eCase application are “platform independent”.**

This means that while the appearance of eCase is very similar to what you are familiar with in other systems, some of the gui (graphic user interface) graphics are not native to the operating system, ie: Windows, Mac, Unix, Aix etc. For example, in the Window platform, you see  sign change to a  sign when you expand the view of a branch of a tree. In eCase, you will see  sign change to a  sign when you expand the view. Likewise, in Windows you use  to minimize, maximize or close a window. In eCase you will perform the same functions using .