

## How to Add Party of Interest (POI) Representatives

- The **Case Party of Interest window** allows eCase administrators to add party-of-interest representatives and Third-Party Administrators (TPAs) to (or remove them from) specific cases.
- The **Party of Interest Representatives window** allows eCase administrators for both insurance carriers and their Third Party Representatives to add party-of-interest representatives and TPAs to (or remove them from) all the party's cases within a district.
- The **Name Search window** allows users to quickly find and enter the ID number associated with a representative they wish to add through the Case Party of Interest window or the Party of Interest Representatives window.
- The **Scheduled Hearings/Meetings window** allows eCase users to view and print a list of all scheduled hearings and meetings, by district or by WCB service center.
- The **Related Materials tab** on the Case Details window, allows users to see a list of case-related items such as physical evidence that cannot be scanned.

**Following are instructions for using each of the functions listed above.**

### **Case Party of Interest Window**

eCase Administrators use the Case Party of Interest window to add or remove carrier representatives or Third-Party Administrators as parties of interest in a specific case. Representatives and TPAs added through this window receive notices just as if they had been added by internal Board staff. Specifically, carrier representatives or TPAs added through this window receive the following notices:

- Notice of Indexing
- Notice of Hearing
- Notice of Decision
- Form letters (known as TFLs)

To add a case party of interest, the person to be added must have a WCB-assigned ID (R number).

**To add a representative to or delete a representative from a specific case, the eCase Administrator takes the following steps:**

1. Log into eCase.
2. From the icons on the toolbar, select the POI icon, second from left



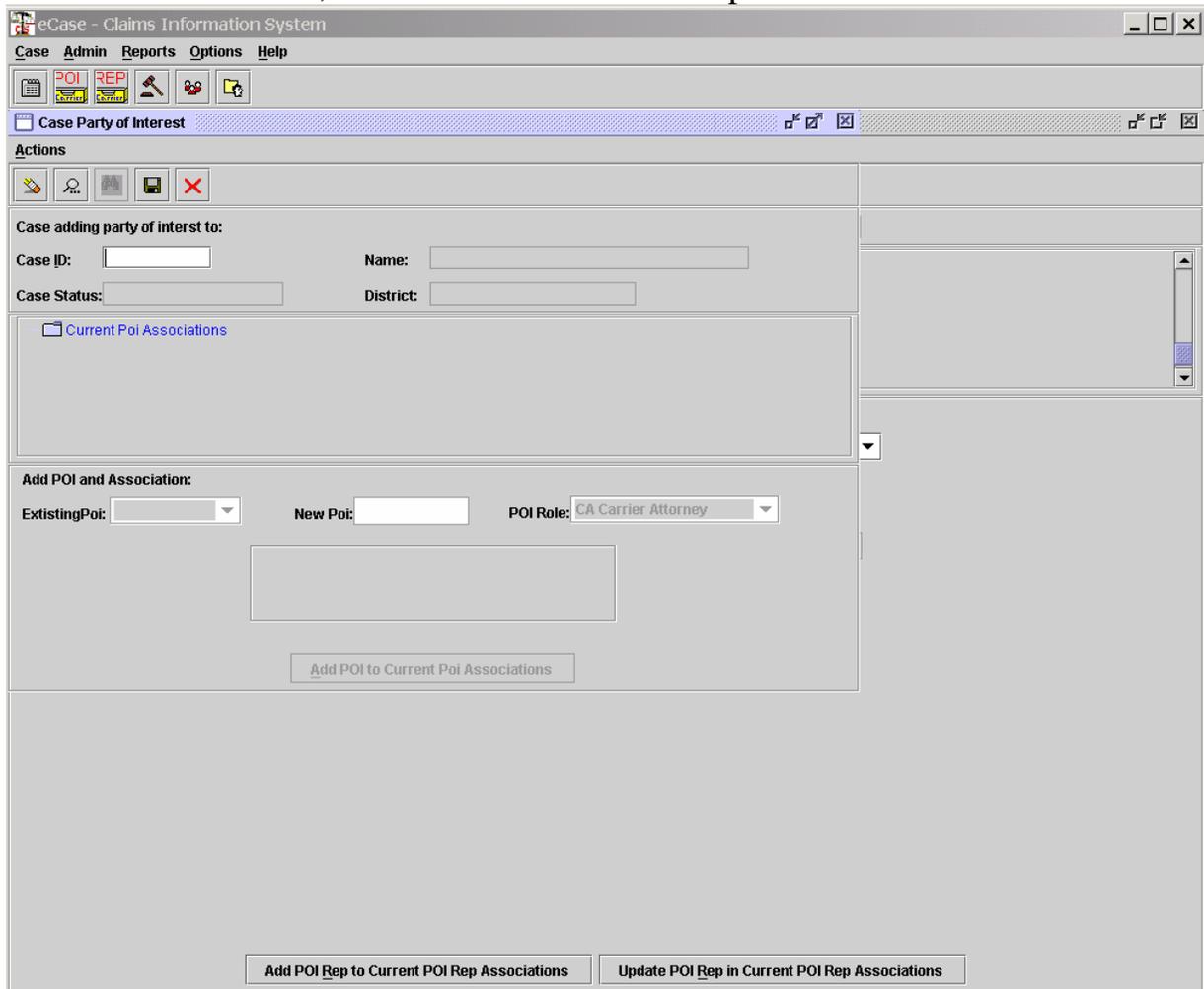
Or

Select Case, then select Case POI from the drop-down menu.



The Case Party of Interest window appears.

3. In the Case ID field, enter the case number and press Enter.

A screenshot of the eCase - Claims Information System 'Case Party of Interest' window. The window title is 'eCase - Claims Information System'. The menu bar includes 'Case', 'Admin', 'Reports', 'Options', and 'Help'. The toolbar contains several icons. The 'Case Party of Interest' window is open, showing a toolbar with icons for adding, deleting, and saving. Below the toolbar, there are fields for 'Case ID', 'Name', 'Case Status', and 'District'. A section titled 'Current Poi Associations' is visible. Below that, there is a section for 'Add POI and Association' with fields for 'ExistingPoi', 'New Poi', and 'POI Role' (set to 'CA Carrier Attorney'). A button labeled 'Add POI to Current Poi Associations' is present. At the bottom of the window, there are two buttons: 'Add POI Rep to Current POI Rep Associations' and 'Update POI Rep in Current POI Rep Associations'.

**Note:** If any TPAs or representatives of your party of interest are already associated with the case, the window displays the party of interest and the representatives' or TPAs' ID numbers, names, and types under Current POI Associations. You can toggle the icons to the left of these listings to show or hide them.

eCase - Claims Information System

Case Admin Reports Options Help

Case Party of Interest for WCB Case ID: 1111111

Actions

Case adding party of interest to:

Case ID: 1111111 Name: Doe, Jane

Case Status: Hearing Set District: Albany

Current Poi Associations

- W124002 - Liberty Mutual Insurance Co
  - R460007 - Leibowitz, Bette B. - Carrier Attorney
  - R817909 - Collins, Collins & Maxwell - Carrier Attorney
- W516132 - Lucent Technologies, Inc.
  - R908500 - Barton & Smith Attorneys - Carrier Attorney

Add POI and Association:

Existing Poi: W124002 Li... New Poi: POI Role: CA Carrier Attorney

Add POI to Current Poi Associations

**To delete a party of interest representative or TPA from a specific case:**

4. Under Current POI Associations, click the checkbox next to the party of interest representative you wish to remove.
5. To delete more parties of interest, click the appropriate checkboxes.

To add party-of-interest representative to a specific case, the eCase Administrator takes the following steps:

6. In the Existing POI field, click the down arrow, then select the party of interest the new representative will be associated with.

Case adding party of interest to:

Case ID: 1111111 Name: Doe, Jane

Case Status: Hearing Set District: Albany

Current Poi Associations

- W124002 - Liberty Mutual Insurance Co
  - R540139 - David W Johnson, Atty - Carrier Attorney
  - R799602 - Nicholas, Perot Strauss Attys - Carrier Attorney
  - R817909 - Collins, Collins & Maxwell - Carrier Attorney
- W516132 - Lucent Technologies, Inc.
  - R908500 - Barton & Smith Attorneys - Carrier Attorney

Add POI and Association:

Existing Poi: [Dropdown] New Poi: [Text Field] POI Role: CA Car

W124002 Liberty Mutual Insurance Co

7. In the New POI field, type the ID number of the party you wish to add  
Or

From the icons on the toolbar, select the binoculars icon or press Alt-F to search by name for the party's ID number.



When the Name Search window appears:

The screenshot shows a 'Name Search' window with the following fields: District: 5 Albany, Type: RP Representative, Name: Pell, and ID: (empty). A 'Search' button is located to the right of the ID field. Below these fields is a table with three columns: WCB ID, Name, and Score. The table contains 25 rows of data, with the first row highlighted in blue. At the bottom of the window are 'OK' and 'Cancel' buttons.

WCB ID	Name	Score
R002619	Frank M. Pell Attorney at Law	79.0
R494204	Trager, Cronin & Byczek, LLP	47.5
R653601	Micale, Stock & Sobolevsky LLP	47.25
R927104	DeFillipo Law Firm P C	45.0
R810300	Paul W Beltz, Atty	40.75
R880006	Thielman and Jason	40.5
R000258	Daniel Alley Attorney at Law	39.5
R005505	Welt Stockton & Associates	39.5
R905001	Ball & Mc Donough Attorney-At-Law	39.0
R542218	Anthony L Polizzi, Atty	34.25
T100047	Klein, Paul	31.5
R434002	Gritz, Paul	21.25
R971508	Paul M Price Esq.	20.5
R500638	Paul Briggs, Atty	20.25
R486119	Paul F Sacco, Atty	20.25
R767500	Paul M Ryther, Atty	20.25
R540394	Roger L Paul, Atty	20.25
R479502	George Poulos, Esq.	20.0
R500232	Paul Davenport, Atty	20.0
R540006	Paul J Herrmann, Atty	20.0
R601709	Carbonaro, Paul A., Esq.	19.75
R927005	DeFilippo & Proudfoot, Attys	19.75
R600701	Paul A Norton Attorney at Law	19.75
R001330	Giannetti, Paul D. Attorney at Law	19.5

- In the Name field, type the name of the representative you want to add.
- From the drop-down menu in the District field, select the appropriate district for the case.

**Note:** The Type field defaults to RP Representative.

- Click the Search button.
- From the list of names displayed, click to select the name you wish to add, then click OK or press Alt-O to make your selection.

The new representative's or TPA's ID number automatically floods the New POI field in the Case Party of Interest window, and the new representative's name and address are displayed.

e. Click Add POI to Current POI Associations to confirm your selection.

The screenshot displays the 'eCase - Claims Information System' interface. At the top, there is a menu bar with 'Case', 'Admin', 'Reports', 'Options', and 'Help'. Below the menu bar is a toolbar with icons for 'POI', 'REP', and other functions. The main window title is 'Case Party of Interest for WCB Case ID: 50106646'. The 'Actions' section contains icons for adding, deleting, and refreshing. The 'Case adding party of interest to:' section includes fields for 'Case ID: 1111111', 'Name: Doe, Jane', 'Case Status: Hearing Set', and 'District: Albany'. Below this is a tree view of 'Current Poi Associations' with the following entries:

- W124002 - Liberty Mutual Insurance Co
  - R460007 - Leibowitz, Bette B. - Carrier Attorney
  - R817909 - Collins, Collins & Maxwell - Carrier Attorney
- W516132 - Lucent Technologies, Inc.
  - R908500 - Barton & Smith Attorneys - Carrier Attorney

The 'Add POI and Association:' section has 'Existing Poi: W124002 Li...', 'New Poi: R002619', and 'POI Role: CA Carrier Attorney'. A text box contains the contact information for Frank M. Pell, Attorney at Law, 329 Albany-Shaker Rd., Loudonville, NY 12211-2043. At the bottom, there is a button labeled 'Add POI to Current Poi Associations' with a mouse cursor pointing to it.

8. In the POI Role field, select either CA Carrier Attorney, CR Carrier Representative, or T9 Third Party Admin to specify the type of representative you are adding.
9. To add more party-of-interest representatives or TPAs to the case, you can begin again with step 8.

**To clear all fields of information that has been entered, the eCase Administrator does the following:**

10. From the icons on the toolbar, select the pencil eraser icon, first on the left.



All entries on the screen will be cleared.

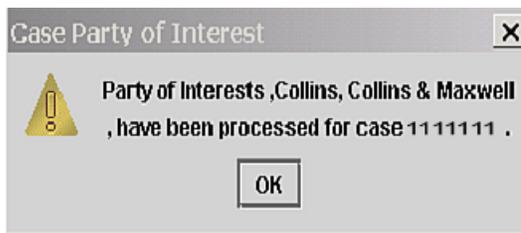
11. To make new entries, follow the steps above, beginning with step 4.

**To save all changes, the eCase Administrator does the following:**

12. From the icons on the toolbar, select the Save Changes icon, second from right, or press Alt-S.



A message appears to tell you what representatives you have added or removed.



**Note:** If the person added is not authorized for the district that has jurisdiction over the case, a message informs you that the name cannot be added.

## Party of Interest Representative Window

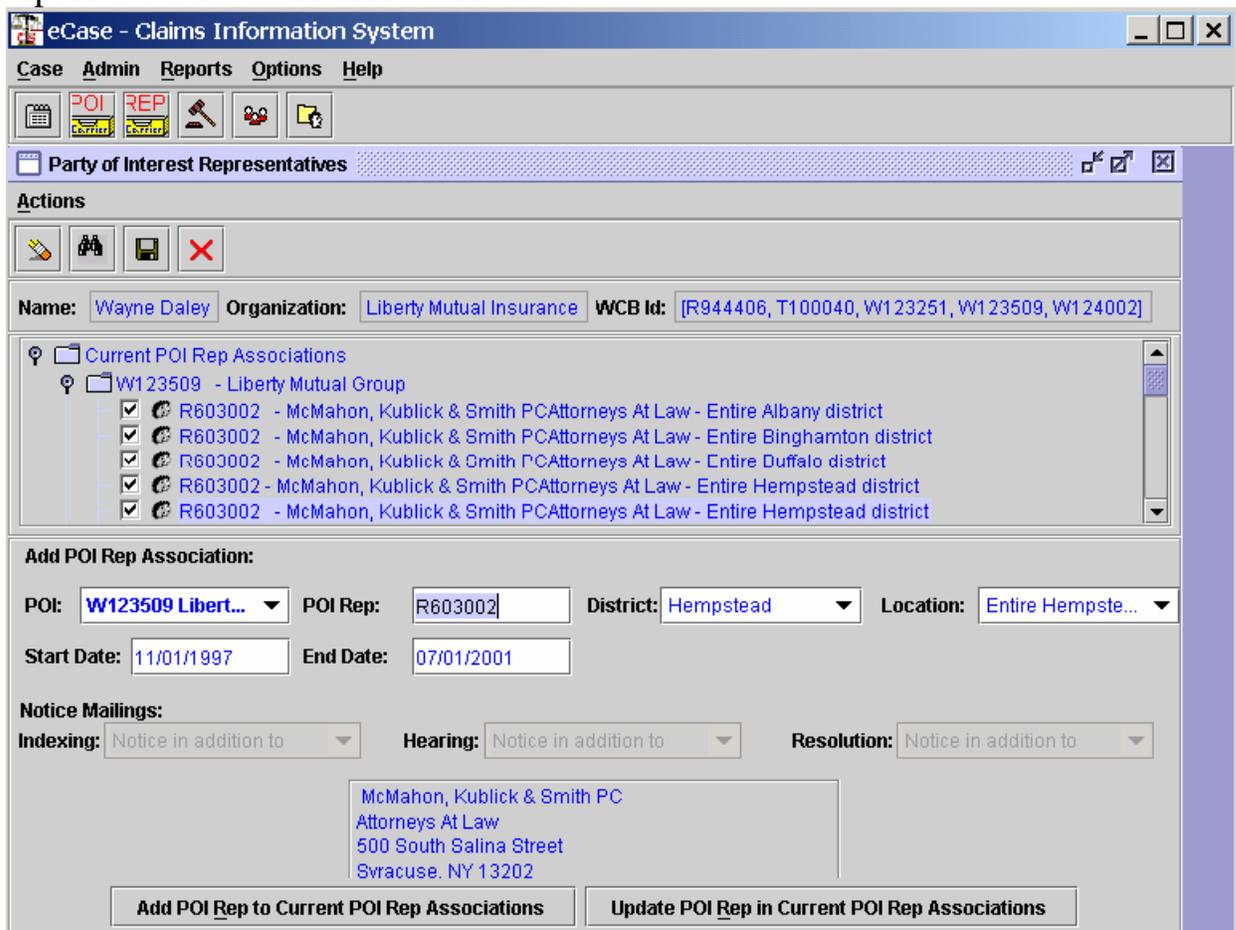
Use the Party of Interest Representatives window to add a party of interest representative for all the party's cases in a specified district.

**To add a representative for all cases within a district, the eCase Administrator takes the following steps:**

1. Log into eCase.
2. From the icons on the toolbar, select the Rep icon, farthest to the right, or press Alt-P.



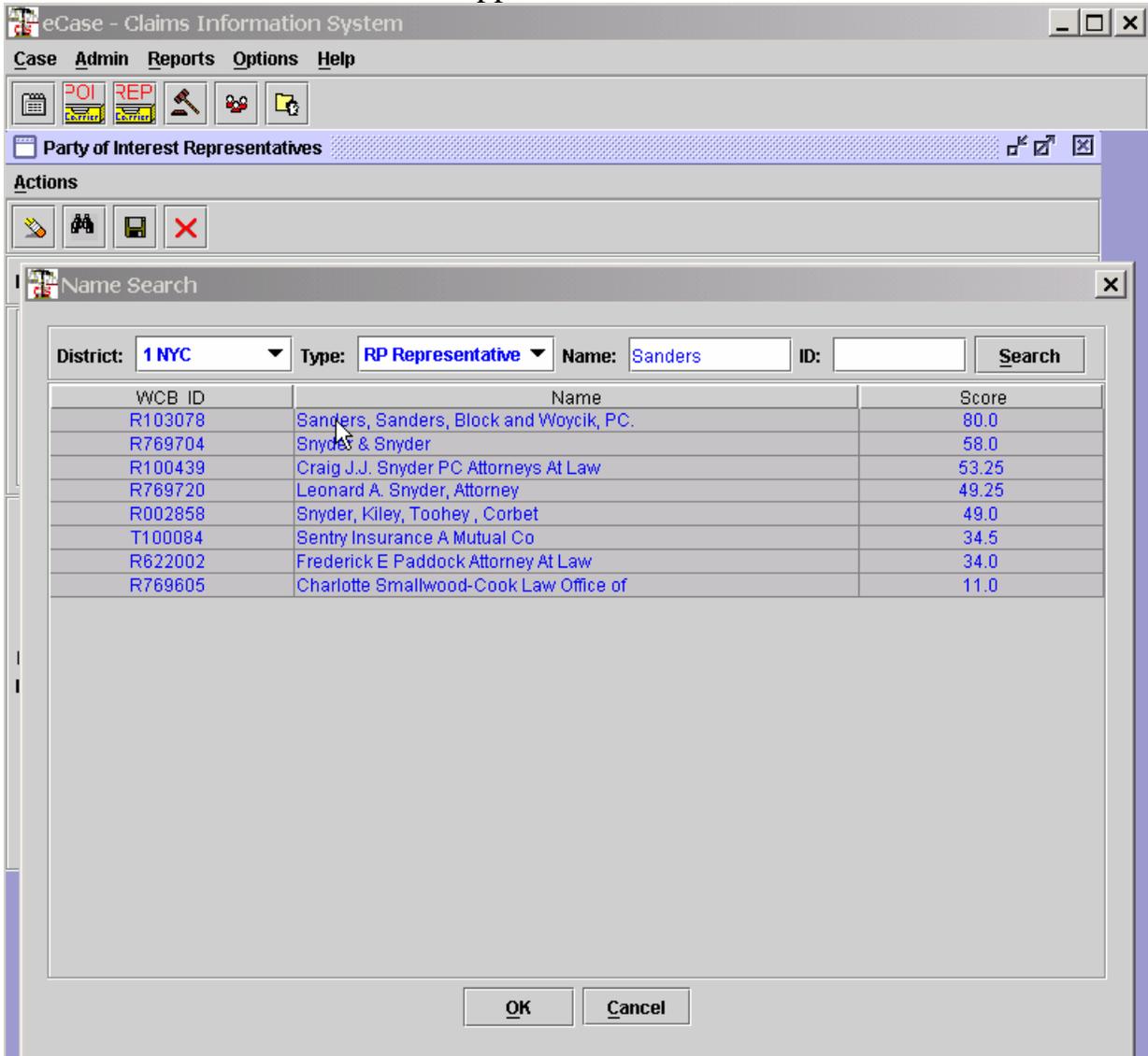
3. From the drop-down menu in the POI: field, select the party of interest the new representative will be associated with.

A screenshot of the eCase - Claims Information System Party of Interest Representatives window. The window title is "eCase - Claims Information System" and it has a menu bar with "Case", "Admin", "Reports", "Options", and "Help". The toolbar contains icons for "POI", "REP", a document with a magnifying glass, a document with a pencil, and a document with a trash can. The main area is titled "Party of Interest Representatives" and contains an "Actions" section with icons for edit, delete, save, and close. Below the actions is a form with fields for "Name: Wayne Daley", "Organization: Liberty Mutual Insurance", and "WCB Id: [R944406, T100040, W123251, W123509, W124002]". There is a tree view for "Current POI Rep Associations" showing a list of associations for "W123509 - Liberty Mutual Group" with checkboxes and radio buttons. Below the tree view is the "Add POI Rep Association:" section with fields for "POI: W123509 Libert...", "POI Rep: R603002", "District: Hempstead", "Location: Entire Hempste...", "Start Date: 11/01/1997", and "End Date: 07/01/2001". There is also a "Notice Mailings:" section with fields for "Indexing:", "Hearing:", and "Resolution:". At the bottom, there is a text box containing the address "McMahon, Kublick & Smith PC Attorneys At Law, 500 South Salina Street, Syracuse, NY 13202" and two buttons: "Add POI Rep to Current POI Rep Associations" and "Update POI Rep in Current POI Rep Associations".

4. In the POI Rep: field, type the ID of the representative or TPA you wish to add
- Or
5. From the icons on the toolbar, select the binoculars icon or press Alt-F to open the Name Search window.



When the Name Search window appears:



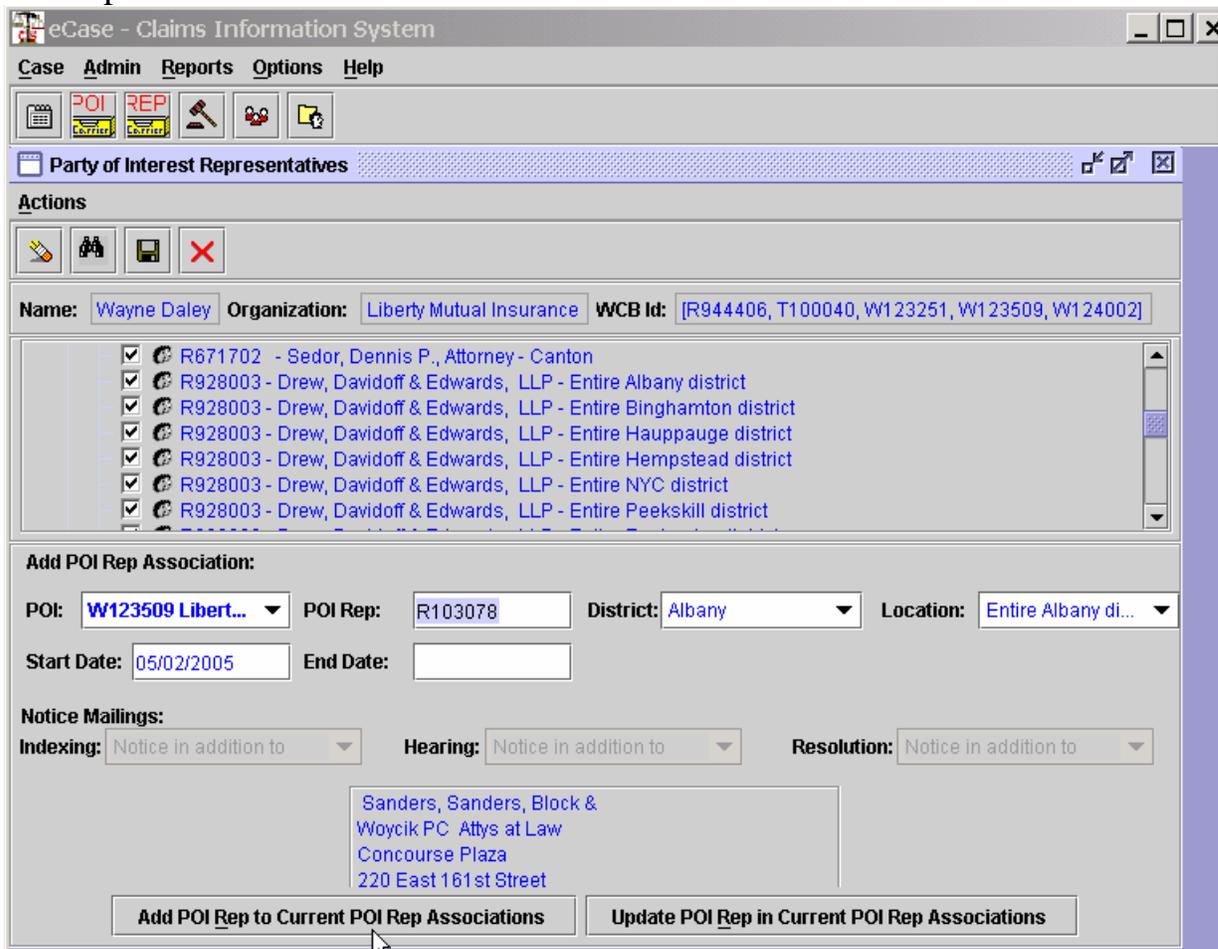
- a. In the Name field, type the name of the representative or TPA you wish to add.
- b. From the drop-down menu in the District field, select the appropriate district for the case.

**Note:** The Type field defaults to RP Representative.

- c. Click the Search button.
- d. From the list of names displayed, click to select the name you wish to add, then click OK or press Alt-O to make your selection.

The new representative's or TPA's ID number automatically floods the POI Rep field in the Party of Interest Representatives window, and the new representative's name and address are displayed.

- 6. Click Add POI to Current POI Associations to confirm your selection and add the new representative or TPA.

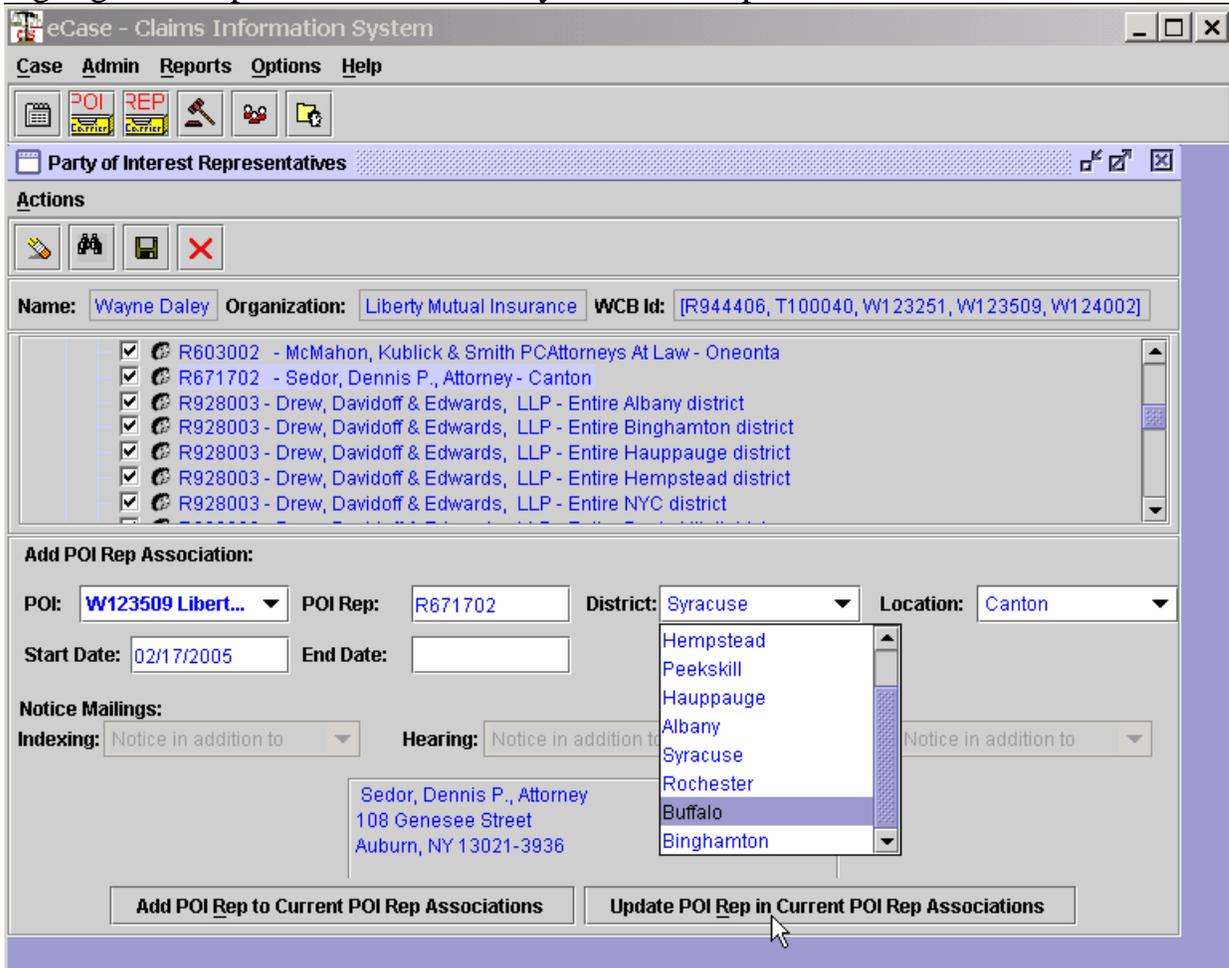


**Note:** The Start Date: field defaults to today's date; the default for the End Date: field is none. Leaving the End Date field empty gives the Party of Interest Representative or TPA access to your cases in this district for an unlimited time. You can change the values in both fields, but keep in mind that Start Date: is a required field, and entering an end date means that the representative will have no access to cases or receive notices after that date.

7. If appropriate, enter the beginning and end dates for the period you want the new representative or TPA to be associated with your Party of Interest for this district.
8. To add more party-of-interest representatives or TPAs to the selected district, you can begin again with step 4.

**To update a representative's access to cases by district, location, or dates:**

9. In the list of POI representatives that appears in the center of the screen, click to highlight the representative or TPA you want to update.



10. Select or enter the new information in the appropriate field.

**Note:** Fields that can be updated are white; those that cannot be changed appear grey.

11. Click Update POI Rep in Current POI Rep Associations.

12. The new information will flood into all fields on the screen. (No message will appear.)

**To remove a party of interest representative from the selected district:**

13. Under Current POI Associations, click the checkbox next to the party of interest representative you wish to remove.
14. To delete more parties of interest, click the appropriate checkboxes.

**To clear all fields of information that has been entered, the eCase Administrator takes the following steps:**

15. From the icons on the toolbar, select the pencil eraser icon, first on the left.



All entries on the screen will be cleared.

16. To make new entries, follow the steps above, beginning with step 4.

**To save all changes, the eCase Administrator does the following:**

17. From the icons on the toolbar, click the Save Changes icon, second from right, or press Alt-S to save your entries.



18. A message appears to tell you what representatives have been added or removed.



## Scheduled Hearings/Meetings Window

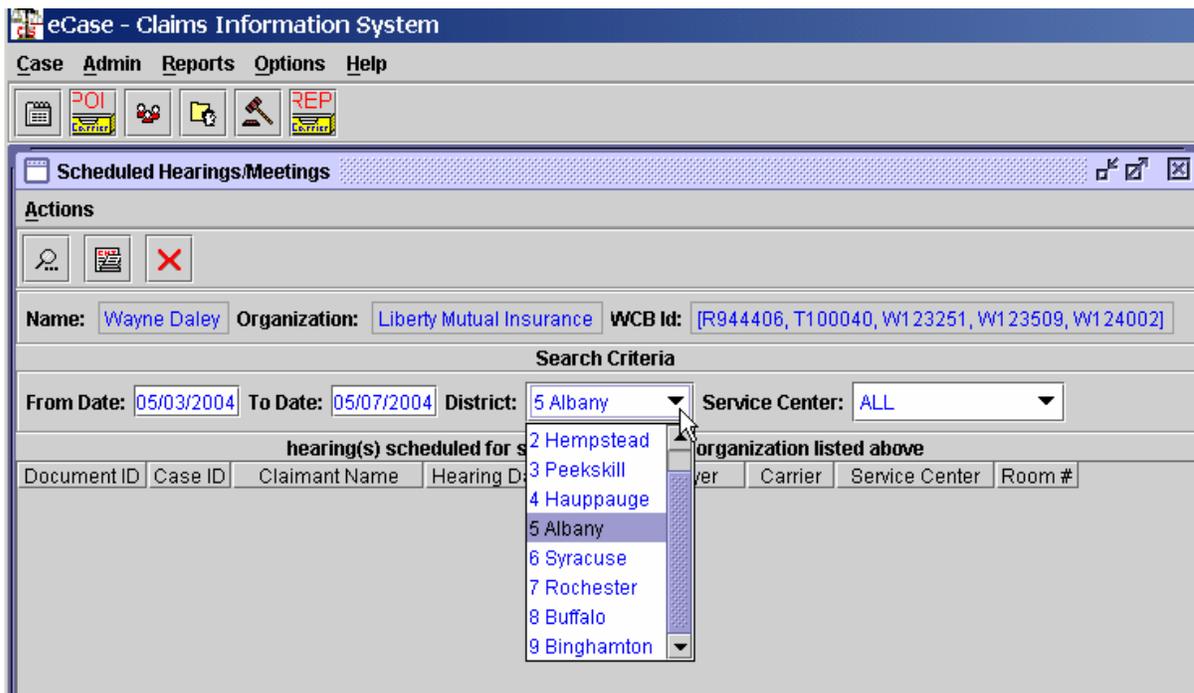
The Scheduled Hearings/Meetings window allows parties of interest to see all scheduled meetings and hearings for a selected WCB district or service center.

To use this feature:

1. Log into eCase.
2. From the icons on the toolbar, select the Scheduled Hearings/Meetings (gavel) icon, second from right, or press Alt-H.

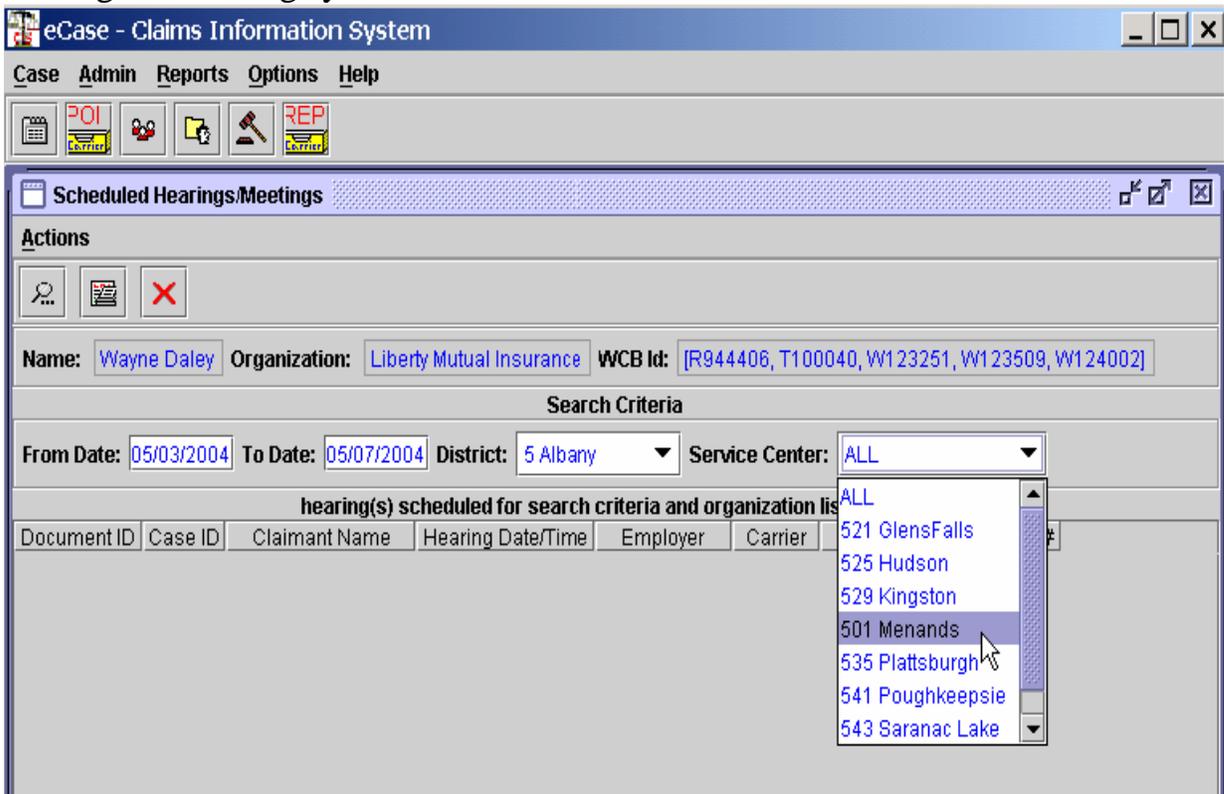


The Scheduled Hearings/Meetings window displays your name, the name of the party of interest you are associated with, and your representative ID number.



3. In the From Date: field, enter the date of the first hearings or meetings you wish to see.
4. In the To Date: field, enter the last day of hearings or meetings you wish to see.

- In the District field, click the arrow to display a drop-down menu showing all WCB districts, and select the district whose hearings or meetings you wish to see.
- In the Service Center field, click the arrow to display a drop-down menu showing all service centers for the selected district, and select the service center whose hearings or meetings you wish to see.



- From the icons on the toolbar, select the magnifier icon, first on the left, to start the search based on the criteria just entered.



eCase displays a list of hearings and meetings that match the search criteria you entered.

eCase - Claims Information System

Case Admin Reports Options Help

POI REP

Scheduled Hearings/Meetings

Actions

Name: Wayne Daley Organization: Liberty Mutual Insurance WCB Id: [R944406, T100040, W123251, W123509, W124002]

Search Criteria

From Date: 05/03/2004 To Date: 05/07/2004 District: 4 Hauppauge Service Center: ALL

hearing(s) scheduled for search criteria and organization listed above

Document ID	Case ID	Claimant Name	Hearing Date/Time	Employer	Carrier	Service Center
	1111111	Doe, Jane	05/03/2004 11:00	One Reacon	Liberty Mutual Ins.Company	Testing
	0000427	FakeLastName, Fr...	05/03/2004 14:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40303888	FakeLastName, Vil...	05/03/2004 14:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40303882	FakeLastName, Lo...	05/03/2004 14:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	20303888	FakeLastName, Lo...	05/03/2004 14:30	Fake Employer	Liberty Mutual Fire Ins.Co.	Testing
	40304769	FakeLastName, Pa...	05/03/2004 14:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	40303880	FakeLastName, Lo...	05/03/2004 15:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40303881	FakeLastName, De...	05/03/2004 15:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40303880	FakeLastName, Os...	05/03/2004 15:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	20004020	FakeLastName, MA...	05/04/2004 09:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	20004019	FakeLastName, Ma...	05/04/2004 10:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	00004750	FakeLastName, TI...	05/04/2004 11:30	Fake Employer	Zurich Insurance Co	Testing
	20004020	FakeLastName, Lo...	05/04/2004 13:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003911	FakeLastName, Ant...	05/04/2004 13:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	00004000	FakeLastName, W...	05/04/2004 13:15	Fake Employer	Wausau Underwriters Ins....	Testing
	00004019	FakeLastName, RI...	05/04/2004 14:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	00004000	FakeLastName, Ro...	05/06/2004 09:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40004000	FakeLastName, Vin...	05/06/2004 09:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40103901	FakeLastName, Lo...	05/06/2004 09:30	Fake Employer	Liberty Mutual Ins.Company	Testing
	40102400	FakeLastName, Jo...	05/06/2004 09:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	00004000	FakeLastName, Paul	05/06/2004 13:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40004000	FakeLastName, Lin...	05/06/2004 15:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003870	FakeLastName, Amy	05/03/2004 10:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003870	FakeLastName, Alb...	05/03/2004 13:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003870	FakeLastName, Pa...	05/03/2004 11:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003870	FakeLastName, Ge...	05/04/2004 09:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003874	FakeLastName, Gail	05/04/2004 09:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003870	FakeLastName, Da...	05/04/2004 09:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003871	FakeLastName, Su...	05/04/2004 09:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003870	FakeLastName, Ch...	05/04/2004 09:30	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003874	FakeLastName, Lo...	05/04/2004 14:30	Fake Employer	Liberty Mutual Fire Ins.Co.	Testing
	40003870	FakeLastName, Ca...	05/04/2004 15:00	Fake Employer	Liberty Mutual Insurance Co	Testing
	40003875	FakeLastName, Ca...	05/04/2004 15:00	Fake Employer	Employee Ins. Co. of Was...	Testing
	40003870	FakeLastName, Pa...	05/04/2004 15:30	Fake Employer	Liberty Mutual Insurance Co	Testing

- a. If a listed hearing or meeting has a document ID displayed (first column), you can click the document ID to see the document as it appears in the case folder.
- b. Clicking a case ID (second column) opens the Case Details window.

**To create a printable report of the hearings and meetings displayed:**

8. From the icons on the toolbar, select the Print icon, second from left, or click Alt-P to open Adobe Acrobat.

**Note:** To use this feature, you must have Adobe Acrobat Reader installed.



9. When the list is displayed in printer-friendly format, click File, then click Print, and when the confirmation window appears, click OK.
10. When the list has been spooled to the printer, click File, then Close to return to eCase.

## Related Materials Window

To see a list of materials related to a specific case, such as physical evidence that cannot be scanned into the case folder, use the Related Materials tab.

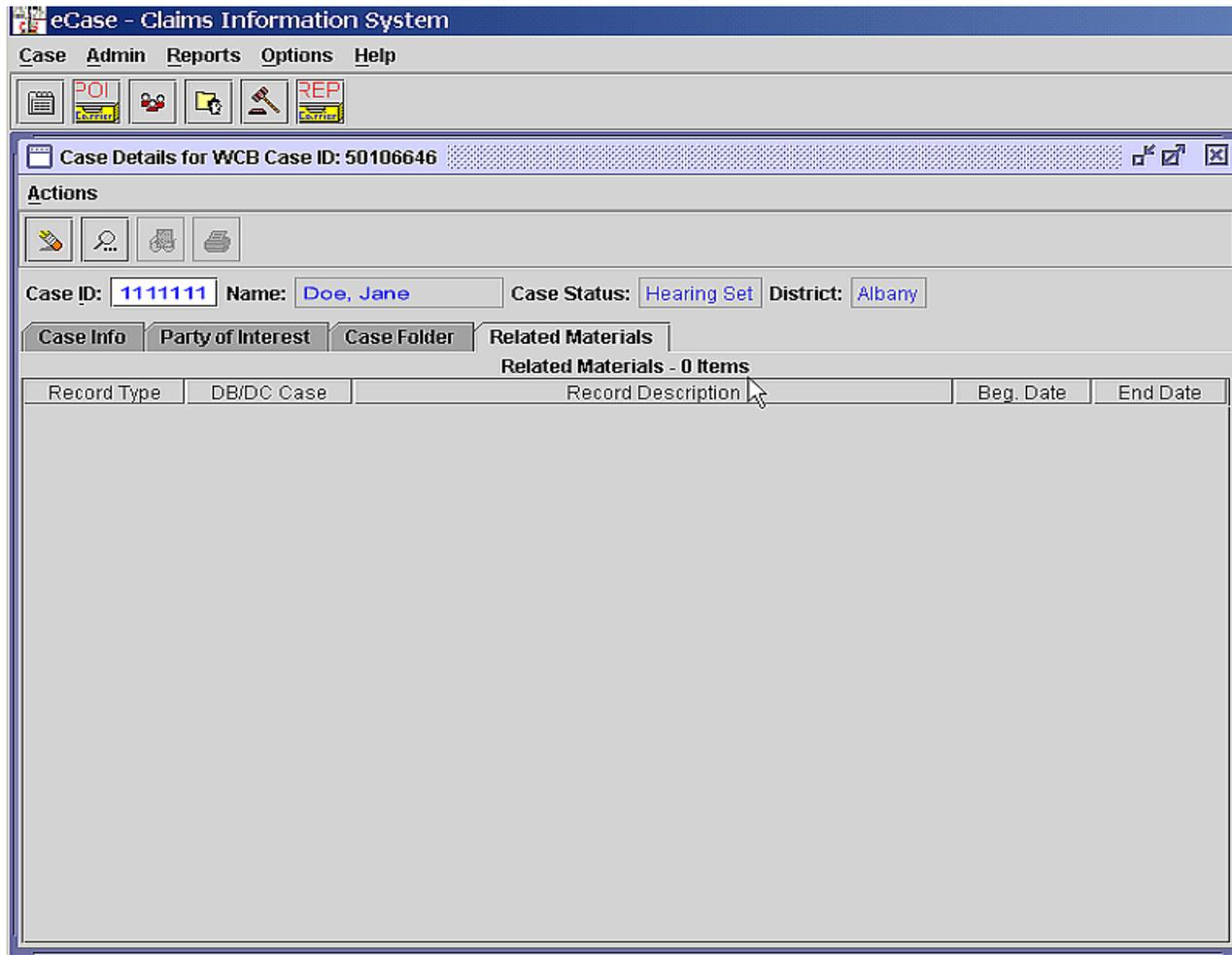
1. From the icons on the toolbar, select the case icon, first on the left, or select Case, then select Case Details from the drop-down menu to display the Case Details window.



2. In the Case ID field, enter the number of the case you are interested in and press Enter.



- From the row of labeled tabs near the center of the window, select Related Materials.



**Note:** The heading on the Related Materials tab shows the number of items displayed. If the number of items is 0, there are no non-electronic materials associated with the case. This tab is read-only; you cannot add items to the list.