pennsylvania
DEPARTMENT OF LABOR & INDUSTRY
WORKERS' COMPENSATION AUTOMATION & INTEGRATION SYSTEM

SELF-REGISTER TO GET AN ACCOUNT (KEYSTONE ID AND PASSWORD): INSURER

This How-To Guide describes the process an insurer follows to self-register and get an account (Keystone ID and Password) to access the Workers' Compensation Automation and Integration System (WCAIS). The How-To Guide is separated into two sections: An administrative insurer user and a non-administrative insurer user.

An administrative user is responsible for administering WCAIS user accounts within the organization. Some of these responsibilities include:

- Verifying new user requests for non-administrative users
- Resetting passwords for users within the organization
- Modifying user profiles (First Name, Last Name, activate/deactivate, update role, edit existing address or email information)

A non-administrative insurer user belongs to an organization and has been provided a registration PIN from their organization's administrator. The registration PIN is associated to the organization's administrator location.

SELF-REGISTRATION: ADMINISTRATIVE INSURER USER

This section of the How-To Guide is specific to an administrative insurer user. During the self-registration request process, if the insurer organization exists in WCAIS and has a minimum of three claims for self-service verification, the self-registration request for the administrative user does not require approval. The user can request self-verification and provide the following details for the three claims:

- Claimant's First Name
- Claimant's Last Name
- Date of Injury
- Employer's FEIN
- Employer's Zip Code

Even if the insurer organization exists in WCAIS and meets the minimum requirement of three claims, the user submitting the self-registration request may request staff-assistance in the user verification process.

If the organization does not exist in WCAIS, or the organization exists but is not associated to a minimum of three claims, the self-registration request for the administrative insurer user must be approved by the Helpline staff.

The process begins from the **WCAIS Home Page**. *(See Figure 1)*

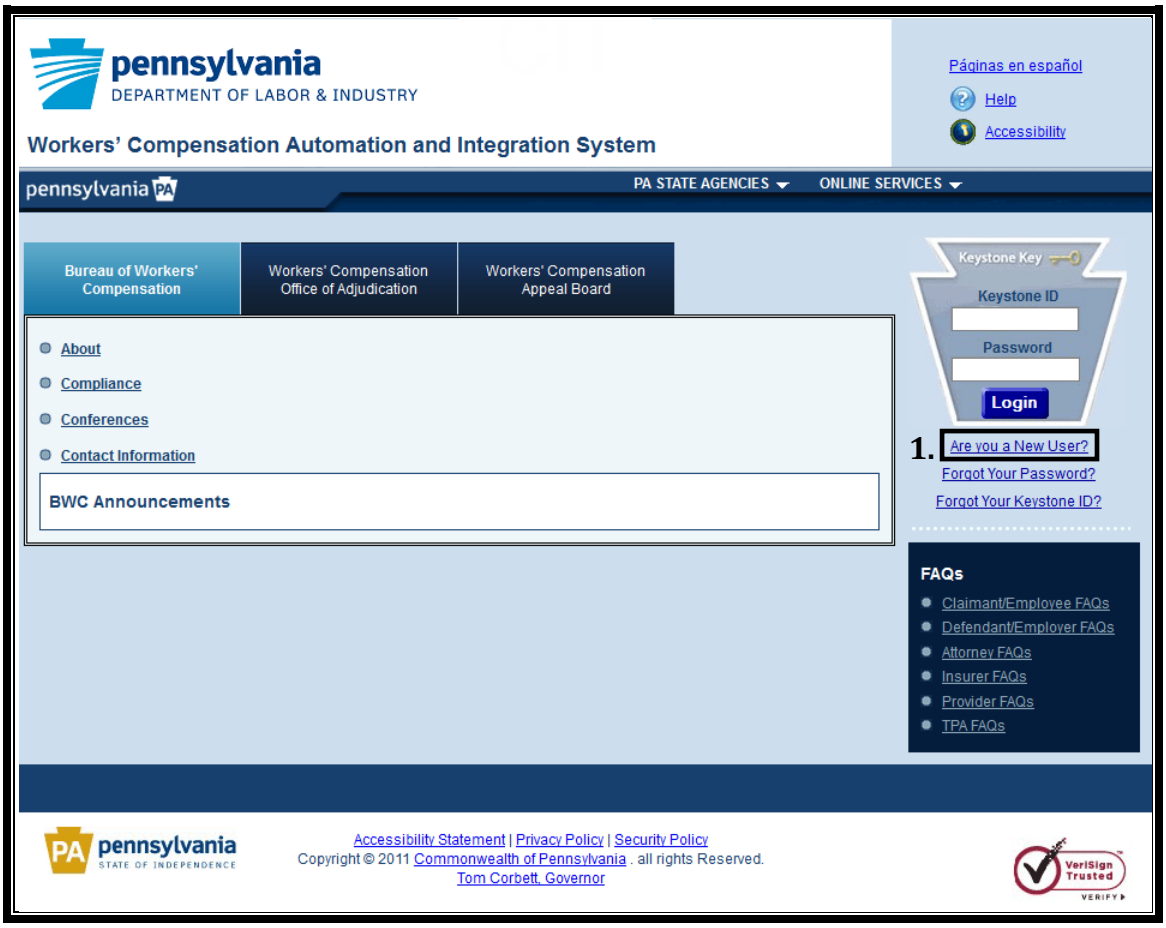

Figure 1: WCAIS Home Page: Are you a New User?

1. From the **WCAIS Homepage**, press the **<u>Are you a New User?</u>** link. *The **Self-Registration - User Selection** screen displays. (See Figure 2)*

SELF-REGISTRATION - USER SELECTION

This screen displays all user types who can self-register in WCAIS. The user selects the appropriate role for the self-registration process.

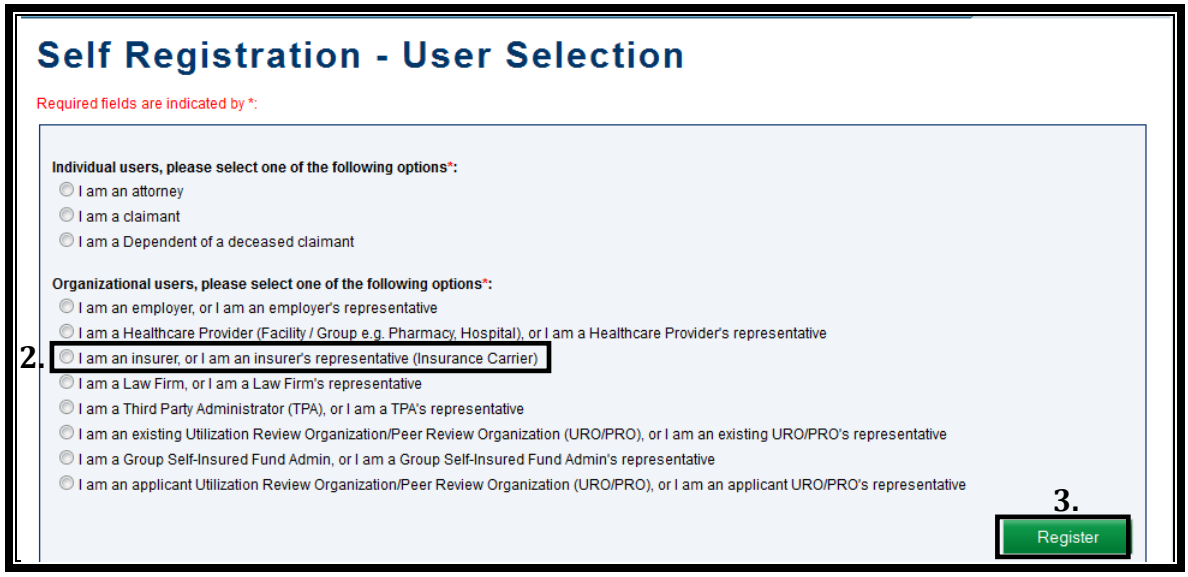

Figure 2: Self-Registration - User Selection: Select User Type

2. Select the **I am an insurer, or I am an insurer's representative (Insurance Carrier)** radio button.

3. Press **Register**. *The **Insurer Self-Registration Request - Role in the Organization** screen displays. (See Figure 3)*

STEP 1: ORGANIZATION ROLE

The Role in the Organization screen is the first step in the self-registration request process for the administrative insurer user.

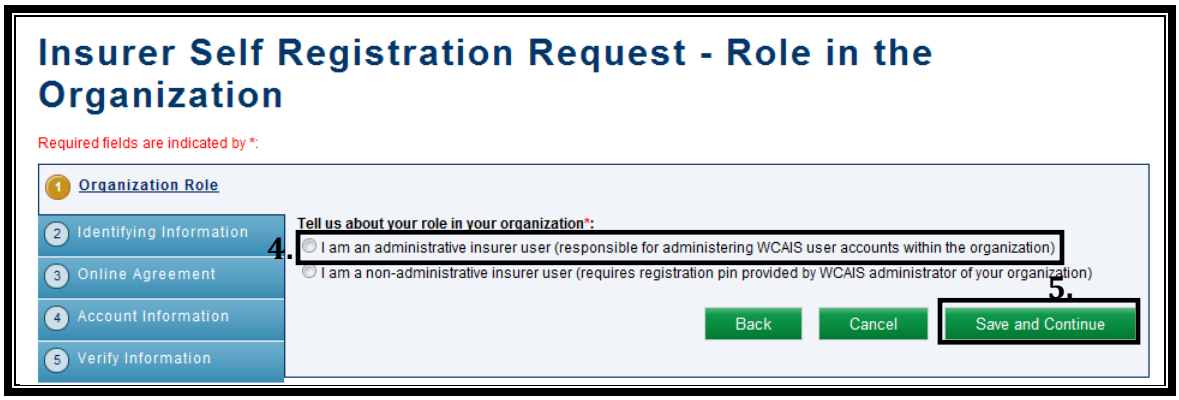

Figure 3: Step 1: Insurer Self-Registration Request - Role in the Organization

4. Select the **I am an administrative insurer user (responsible for administering WCAIS user accounts within the organization)** radio button.

5. Press **Save and Continue**. *The **Insurer Self-Registration Request - Identifying Information** screen displays. (See Figure 4)*

STEP 2: IDENTIFYING INFORMATION

This screen is the second step in the self-registration request process for an administrative insurer user. The user must complete all of the required fields on this screen, and correctly answer a security question before continuing onto the next step in the process.

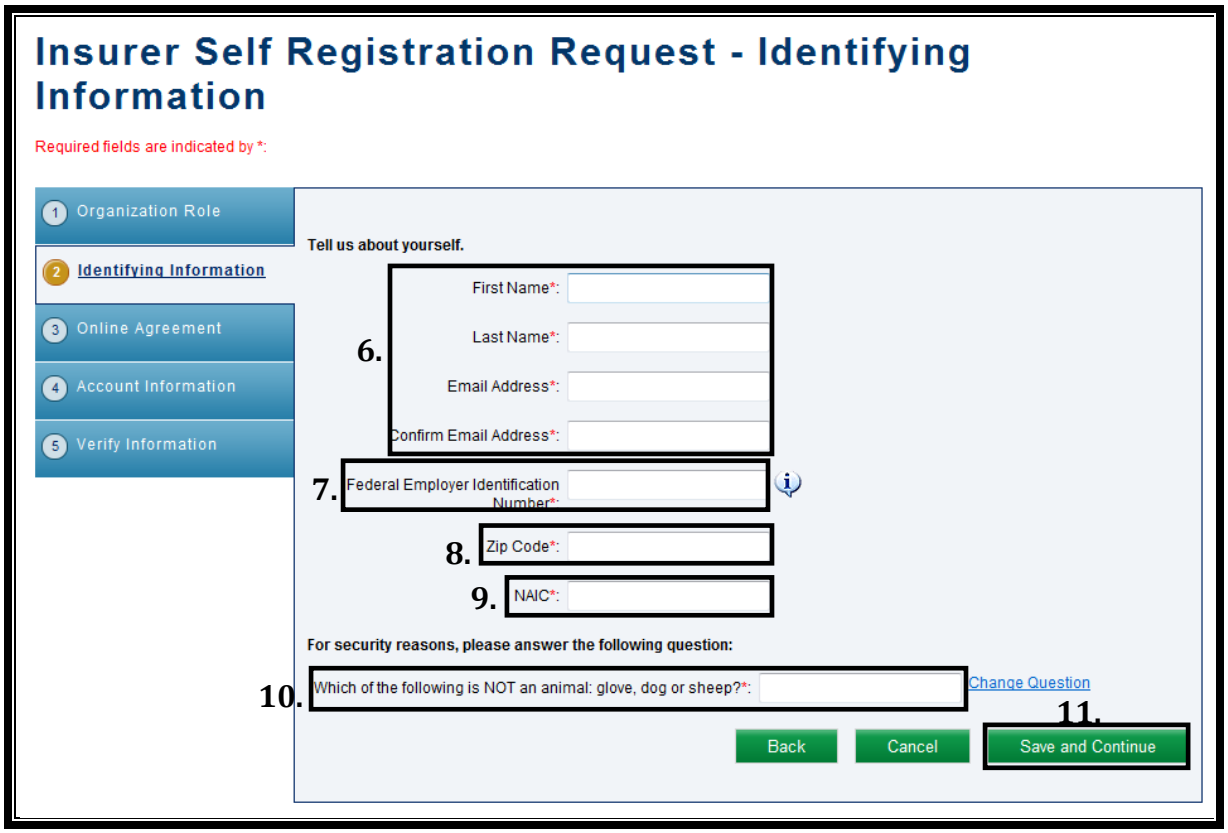

Figure 4: Step 2: Insurer Self-Registration Request - Identifying Information

6. Enter the user's identifying information.

7. Enter the organization's Federal Employer Identification Number (FEIN) in the **Federal Employer Identification Number** field.

8. Enter the zip code for the organization in the **Zip Code** field.

9. Enter the organization's NAIC code in the **NAIC** field.

10. Enter the answer to the security question.

NOTE: WCAIS randomly selects a security question and the user must successfully answer the question as part of the self-registration process. If necessary, the user can press the Change Question link to change the security question.

11. Press **Save and Continue**.

Based upon the information entered on the **Identifying Information** screen, WCAIS determines that:

- The self-registration request is for a new user for a new organization. *The **Insurer Self-Registration Request - Organization Information** screen displays. (See Figure 5)*

  NOTE: *Continue with Step 12*.

- The self-registration is for a new user for an existing organization, but a new location is being added for the organization. *The **Insurer Self-Registration Request - Organization Information** screen displays. (See Figure 6)*

  NOTE: *Skip Steps 12-15 and continue with Step 16.*

- The self-registration request is for a new user for an existing organization and an existing location and is associated with three or more claims. *The **Insurer Self-Registration Request - User Verification** screen displays. (See Figure 7)*

  NOTE: *Skip Steps 12-18 and continue with Step 19.*

- The self-registration request is for a new user for an existing organization and an existing location and is not associated with three or more claims. *The **Insurer Self-Registration Request - Online Agreement** screen displays. (See Figure 8)*

  NOTE: *Skip Steps 12-21 and continue with Step 22.*

STEP 2A: ORGANIZATION INFORMATION

This screen displays if the self-registration request is for a new user and a new Insurer organization. The FEIN, and Zip/Postal Code fields are pre-populated with the information entered on the Identifying Information screen.

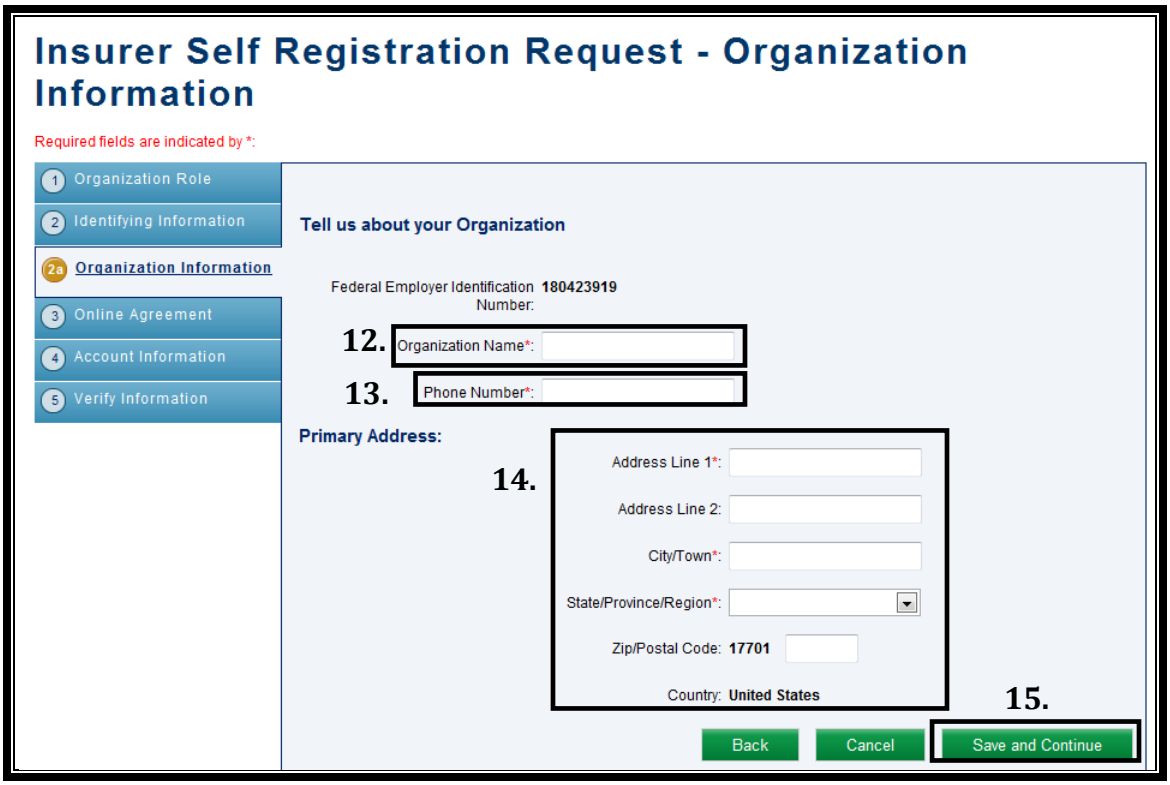

Figure 5: Step 2A: Insurer Self-Registration Request - Organization Information: New User/New Organization

12. Enter the organization name in the **Organization Name** field.
13. Enter the phone number in the **Phone Number** field.
14. Enter the address information in the **Primary Address** section.
15. Press **Save and Continue**. *The* **Insurer *Self-Registration Request - Online Agreement*** *screen displays. (See Figure 8)*

    NOTE: *Skip Steps 15-16 and continue with Step 17.*

STEP 2A: ORGANIZATION INFORMATION

This screen displays if the Insurer organization exists in WCAIS, but the location is new. The screen pre-populates the FEIN, the organization name associated to the FEIN and the Zip/Postal Code. The administrative insurer enters the remaining details for the insurer's organization.

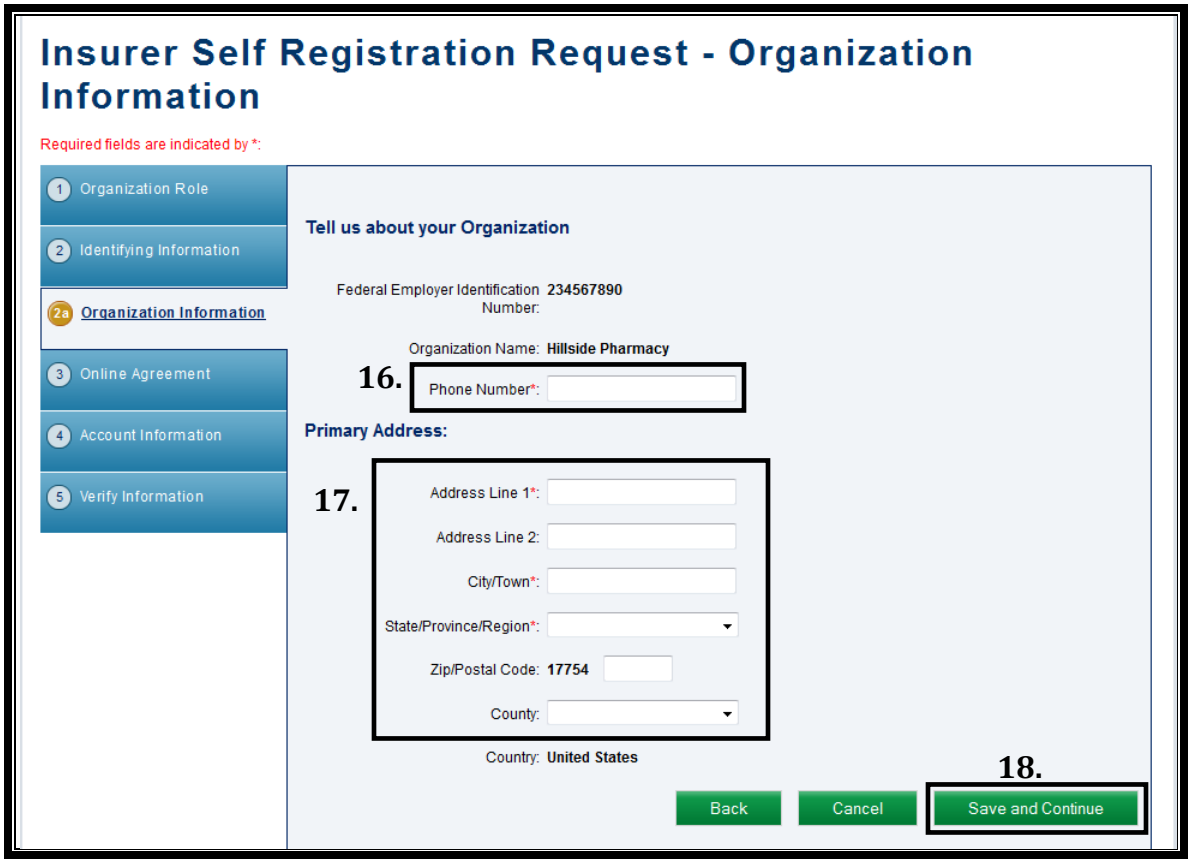

Figure 6: Step 2A: Insurer Self-Registration Request - Organization Information: Existing Organization/New Location

16. Enter the phone number in the **Phone Number** field.
17. Enter the address information in the **Primary Address** section.
18. Press **Save and Continue**.

After pressing **Save and Continue**, WCAIS determines that:

- The organization is associated to three or more claims. *The **Insurer Self-Registration Request - User Verification** screen displays. (See Figure 7)*

  NOTE: *Continue with Step 19.*

- The organization is not associated to three or more claims. *The **Insurer Self-Registration Request - Online Agreement** screen displays. (See Figure 8)*

  NOTE: *Skip Steps 19-21 and continue with Step 22.*

STEP 2A: USER VERIFICATION

This screen allows the insurer administrator to choose between Self-Verification and Staff-Assisted Verification. To continue the process using self-verification, the insurer administrator enters details about three claims their organization has been associated with. If the insurer administrator chooses staff-assisted verification, the user enters a telephone number and a staff member contacts the user to assist in the verification process.

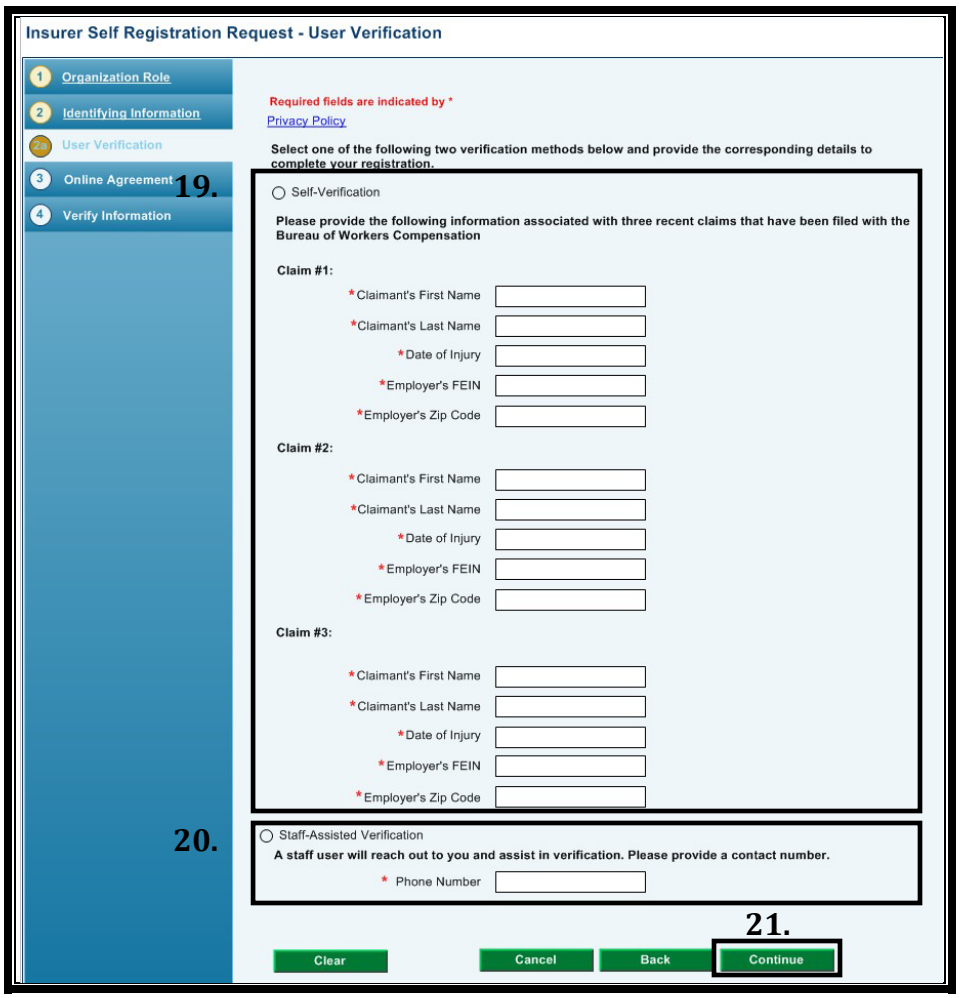

Figure 7: Step 2a: Insurer Self-Registration Request - User Verification

19. Select the **Self-Verification** radio button and complete the required fields for **Claim #1**, **Claim #2** and **Claim #3**.

OR

20. Select the **Staff-Assisted Verification** radio button and enter a phone number in the **Phone Number** field.

21. Press **Continue**. *The **Insurer Self-Registration Request - Online Agreement** screen displays. (See Figure 8)*

STEP 3: ONLINE AGREEMENT

This screen is the third step in the self-registration process for an administrative insurer user. The user must read the WCAIS User Agreement and confirm that it has been read, understood and agreed upon.

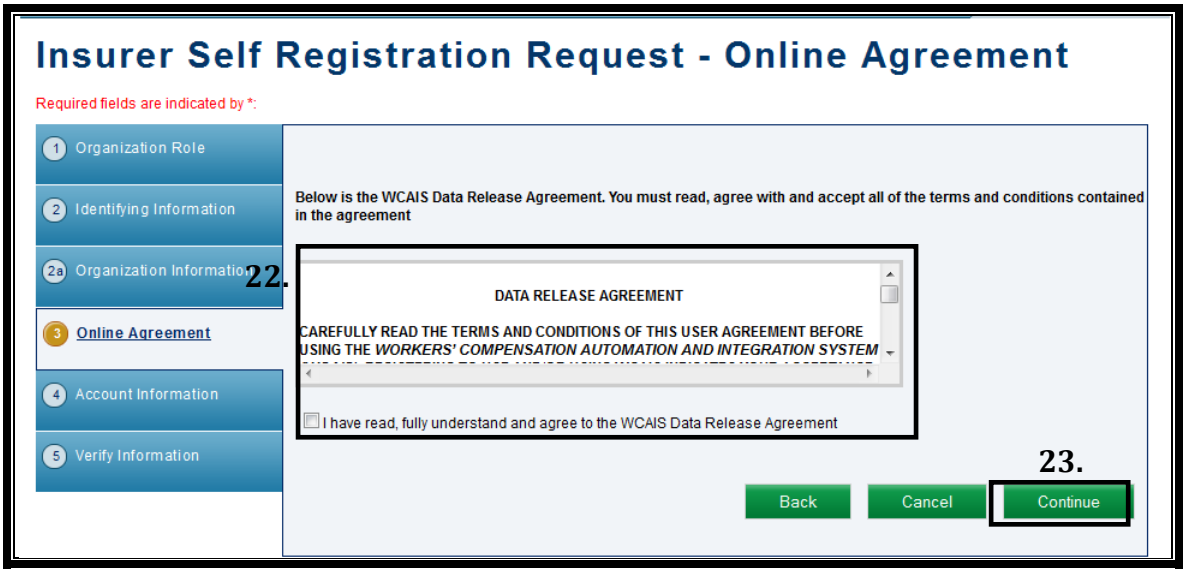

Figure 8: Step 3: Insurer Self-Registration Request - Online Agreement

22. Read the WCAIS User Agreement and check the **I have read, fully understand and agree to the WCAIS User Agreement** checkbox.

23. Press **Continue**. *The **Insurer Self-Registration Request - Account Information** screen displays. (See Figure 9)*

STEP 4: ACCOUNT INFORMATION

This screen is the fourth step in the administrative insurer self-registration process. The user creates a unique password that will be used every time the user logs into WCAIS. The user also selects three hint questions and provides three hint answers that will be used to reset the password, if forgotten. The password must meet the specified criteria listed on this screen.

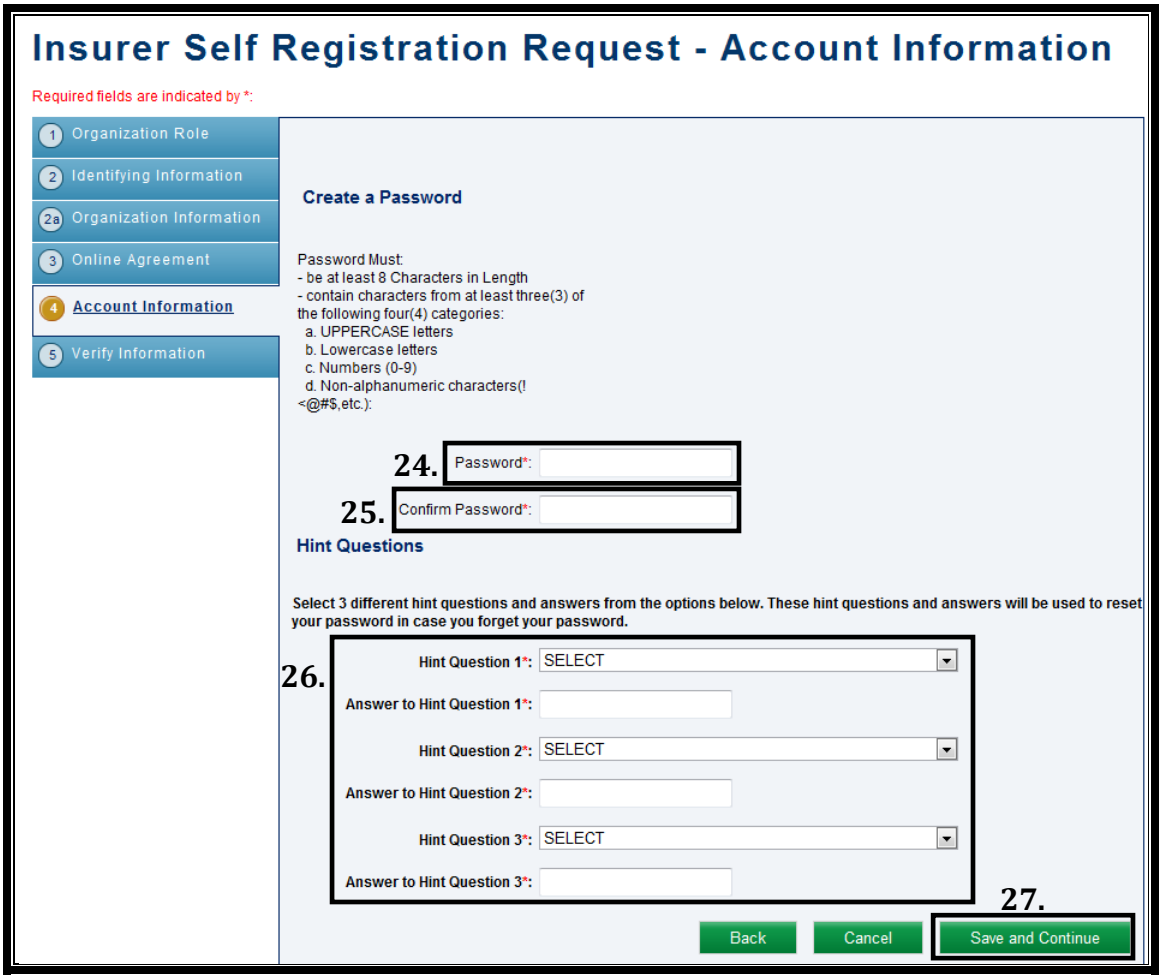

Figure 9: Step 4: Insurer Self-Registration Request - Account Information

24. Enter a password in the **Password** field.

25. Re-enter the password in the **Confirm Password** field.

26. Press the arrow in the **Hint Question** drop-down fields and select a question. Enter the answers to the hint questions in the **Answer to Hint Question** fields.

    NOTE: All **Hint Question** and **Hint Answer** fields must be completed.

    NOTE: The **Hint Answer** field is not case sensitive.

27. Press **Save and Continue**. *The **Insurer Self-Registration Request - Verify Information** screen displays. (See Figure 10)*

STEP 5: VERIFY INFORMATION

This screen is the fifth and final step in the self-registration process for an administrative insurer user. It displays all of the information entered by the user. The user reviews the information for accuracy prior to submission.

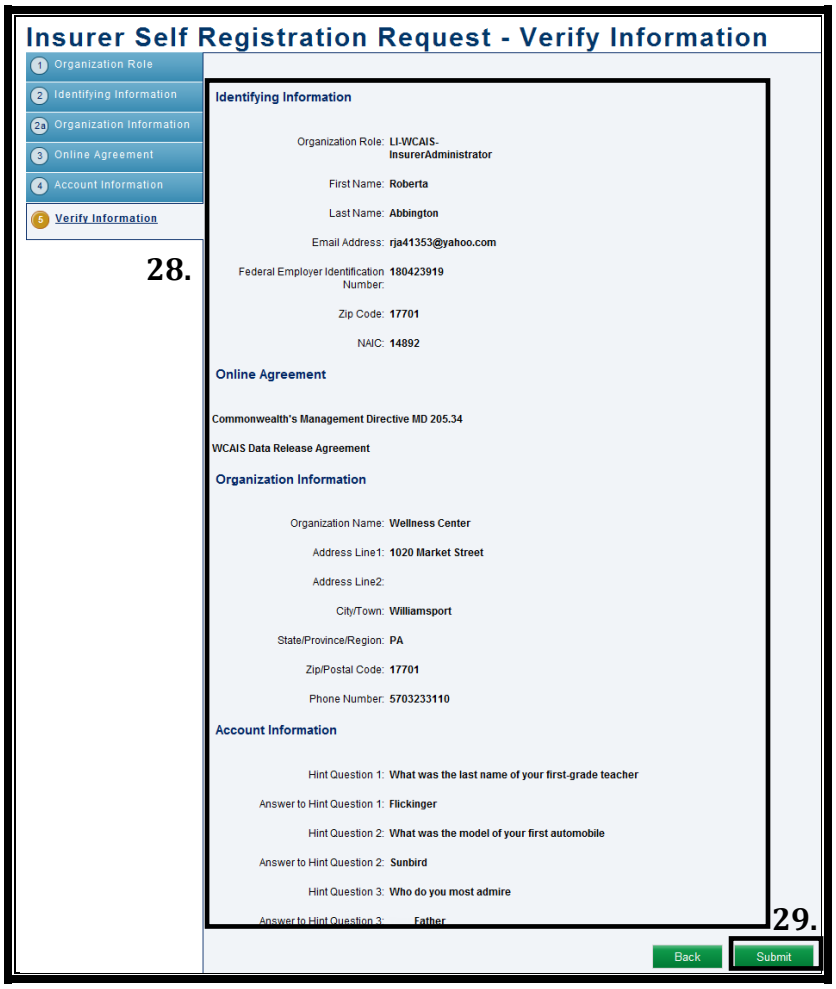

Figure 10: Step 5: Insurer Self-Registration Request - Verify Information

28. Review the information.

29. Press **Submit**. *The appropriate screen displays.*

NOTE: If the administrative insurer user is not associated to three or more claims, *the **Insurer Self-Registration Request - Request Sent for Approval** screen displays. Refer to the **Request Sent for Approval** section of this How-To Guide. (See Figure 11)*

NOTE: If the administrative insurer user is associated to three or more claims, but selected staff-assisted verification, *the **Insurer Self-Registration Request - Request Sent for Approval** screen displays. Refer to the **Request Sent for Approval** section of this How-To Guide. (See Figure 11)*

NOTE: If the administrative insurer user entered details for three associated claims, *the **Insurer Self-Registration Request - Registration Successful** screen displays. Refer to the **Registration Successful** section of this How-To Guide. (See Figure 12)*

REQUEST SENT FOR APPROVAL

WCAIS sends an email notification to the Bureau staff to review the registration request and either approve or reject it. Once the self-registration request is processed, WCAIS generates correspondence to inform the administrator that their self-registration has been approved and completed, or rejected. If approved, WCAIS provides the Keystone ID, the organization's WCAIS User Registration PIN and directions to login to WCAIS.

Figure 11: Insurer Self-Registration Request - Request Sent for Approval

REGISTRATION SUCCESSFUL

WCAIS validates the entered information and if successful, the user receives this screen which displays the administrator's Keystone ID, the organization's WCAIS User Registration PIN, and provides a link for the user to login to WCAIS. If there is an existing administrator for the organization, WCAIS sends correspondence to inform the existing administrator(s) that a user from their organization has been added as an administrator.

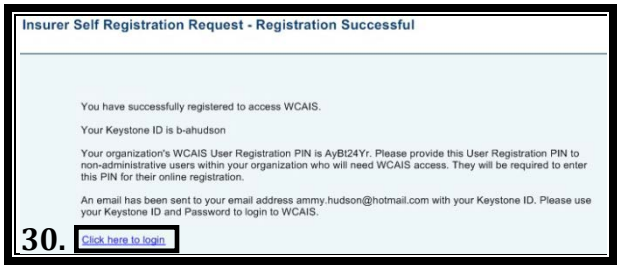

Figure 12: Insurer Self-Registration Request - Registration Successful

30. Press the **Click here to login** link to login to WCAIS.

SELF-REGISTRATION: NON-ADMINISTRATIVE USER - INSURER

The process begins from the **WCAIS Home Page.** *(See Figure 1)*

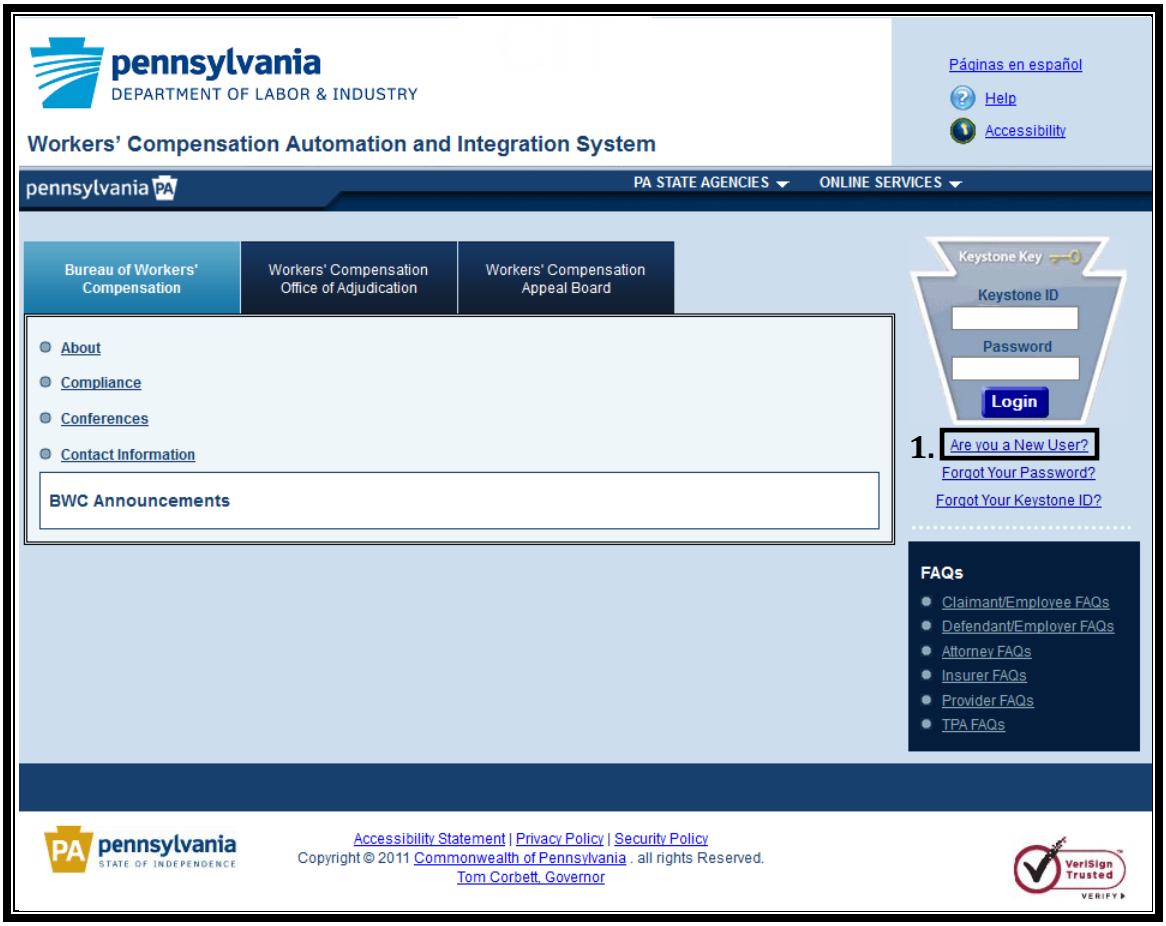

Figure 1: WCAIS Home Page: Are you a New User?

1. From the **WCAIS Homepage**, press the **<u>Are you a New User?</u>** link. *The **Self-Registration - User Selection** screen displays. (See Figure 2)*

SELF-REGISTRATION - USER SELECTION

This screen displays for all user types who are self-registering in WCAIS. The user selects the appropriate role for the self-registration process.

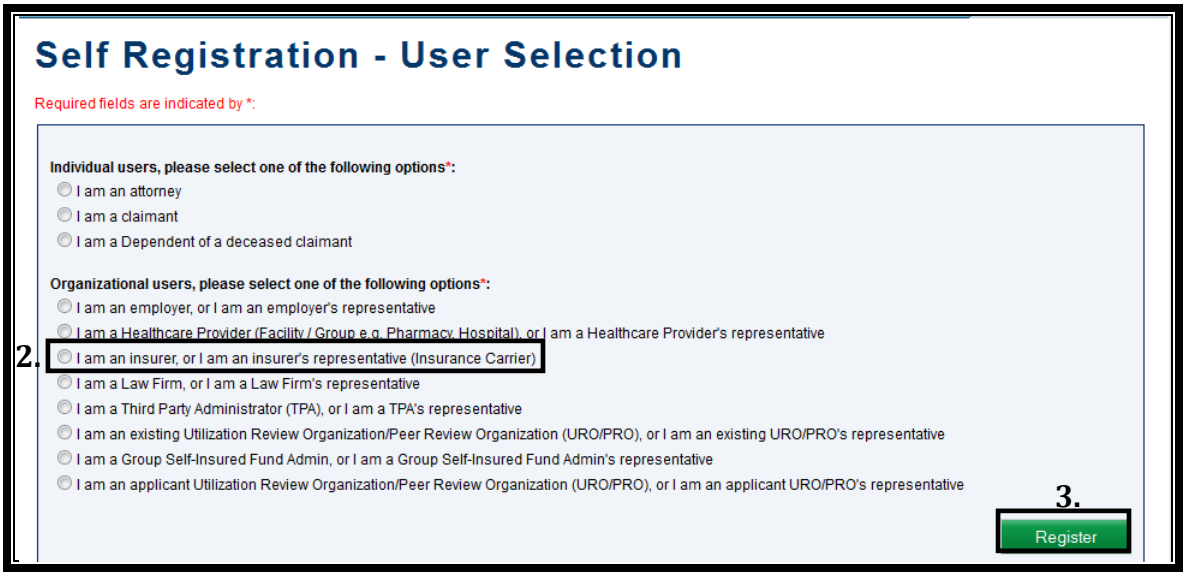

Figure 2: Self-Registration - User Selection: Select User Type

2. Select the **I am an insurer, or I am an insurer's representative (Insurance Carrier)** radio button.

3. Press **Register**. *The **Insurer Self Registration Request - Role in the Organization** screen displays. (See Figure 3)*

STEP 1: ORGANIZATION ROLE

The self-registration process for a non-administrator insurer user contains five steps. The **Role in the Organization** screen is the first step in the process.

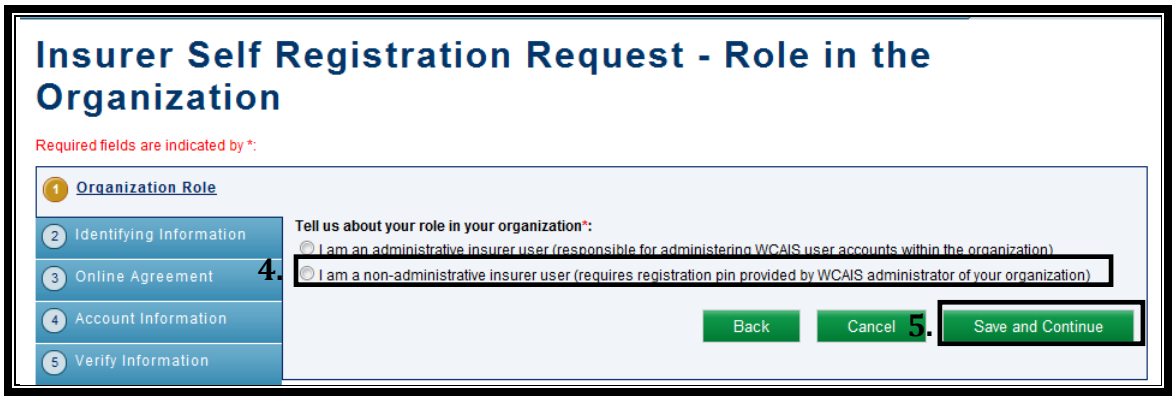

Figure 3: Step 1: Organization Role: Non-Administrative Insurer User

4. Select the radio button for **I am a non-administrative insurer user (requires registration PIN provided by WCAIS administrator of your organization)**.

5. Press **Save and Continue**. *The **Insurer Self-Registration Request - Identifying Information** screen displays. (See Figure 4)*

STEP 2: IDENTIFYING INFORMATION

This screen is the second step in the self-registration process for a non-administrative insurer user. The user must complete all of the required fields on this screen, and correctly answer a security question before continuing onto the next step in the process.

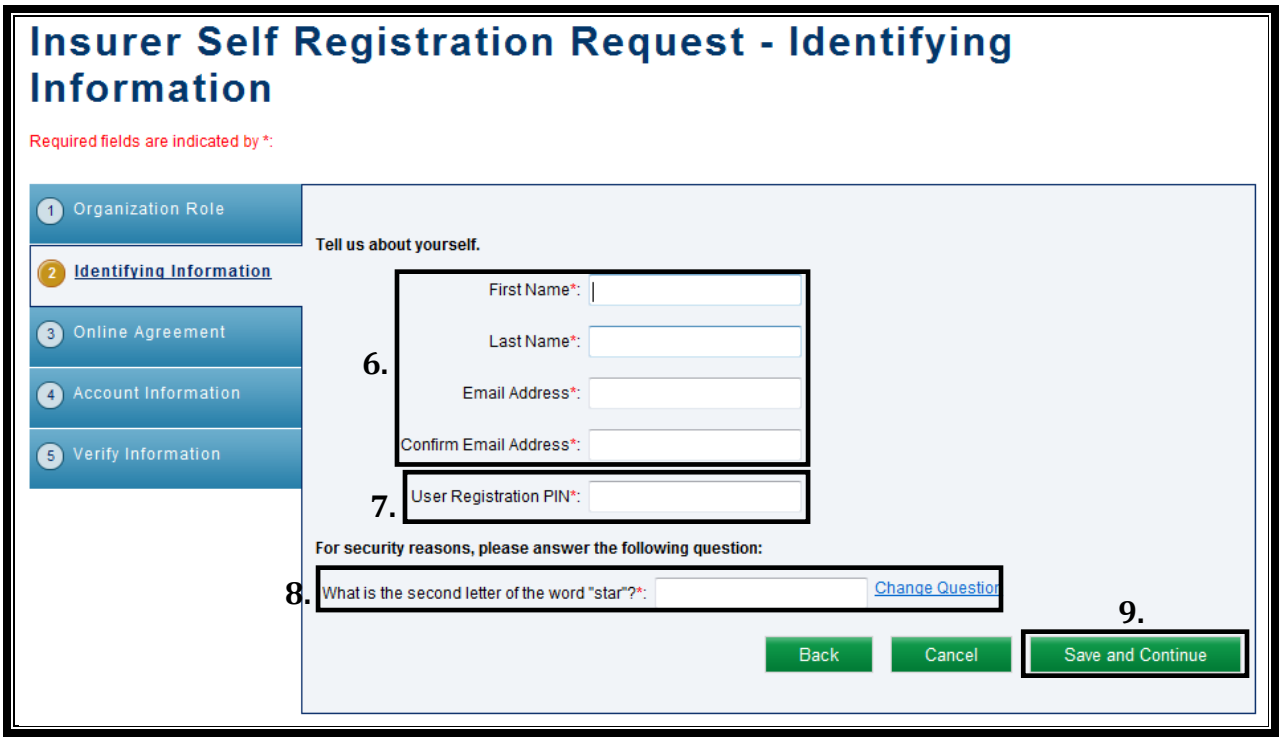

Figure 4: Step 2: Identifying Information: Non-Administrative Insurer User

6. Enter the identifying information.

7. Enter the Registration PIN provided by the Organization's Administrator in the **User Registration PIN** field.

8. Enter the answer to the security question.

   NOTE: WCAIS randomly selects a security question and the user must successfully answer the question as part of the self-registration process. If necessary, the user can press the Change Question link to change the security question.

9. Press **Save and Continue**. *The **Insurer Self-Registration Request - Online Agreements** screen displays. (See Figure 5)*

STEP 3: ONLINE AGREEMENT

This screen is the third step in the self-registration process for a non-administrative insurer user. The user must read the WCAIS User Agreement and confirm that it has been read, understood and agreed upon.

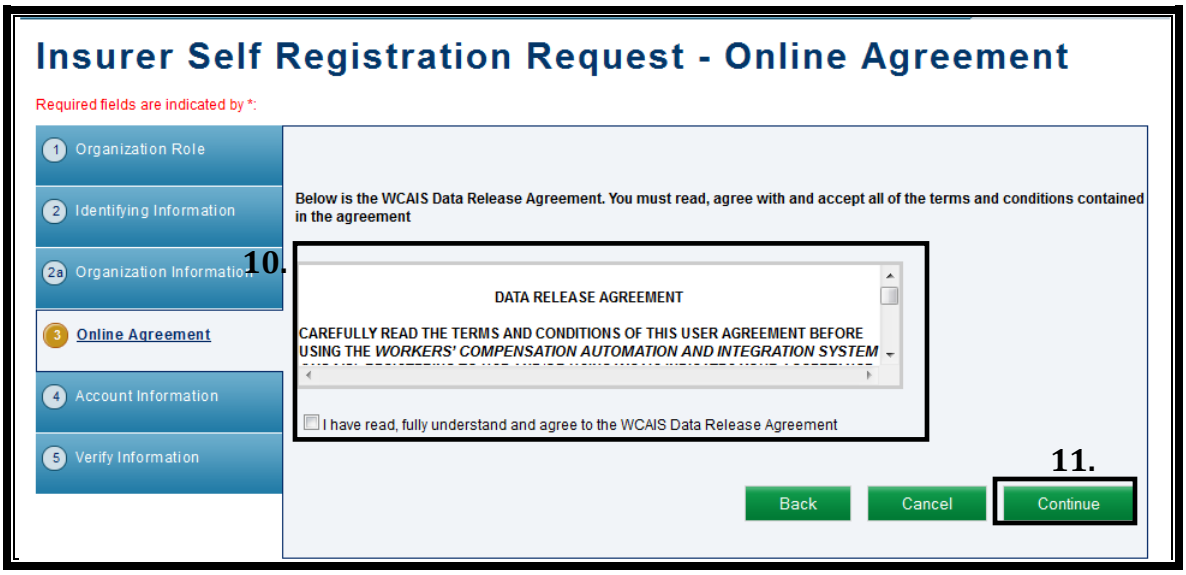

Figure 5: Step 3: Online Agreement: Non-Administrative Insurer User

10. Read the WCAIS User Agreement and check the **I have read, fully understand and agree to the WCAIS User Agreement** checkbox.

11. Press **Continue**. *The **Insurer Self-Registration Request - Account Information** screen displays. (See Figure 6)*

STEP 4: ACCOUNT INFORMATION

This screen is the fourth step in the non-administrative insurer user self-registration process. The user creates a unique password that will be used every time the user logs into WCAIS. The user also selects three hint questions and provides three hint answers that will be used to reset the user's password, if forgotten. The password must meet the specified criteria listed on this screen.

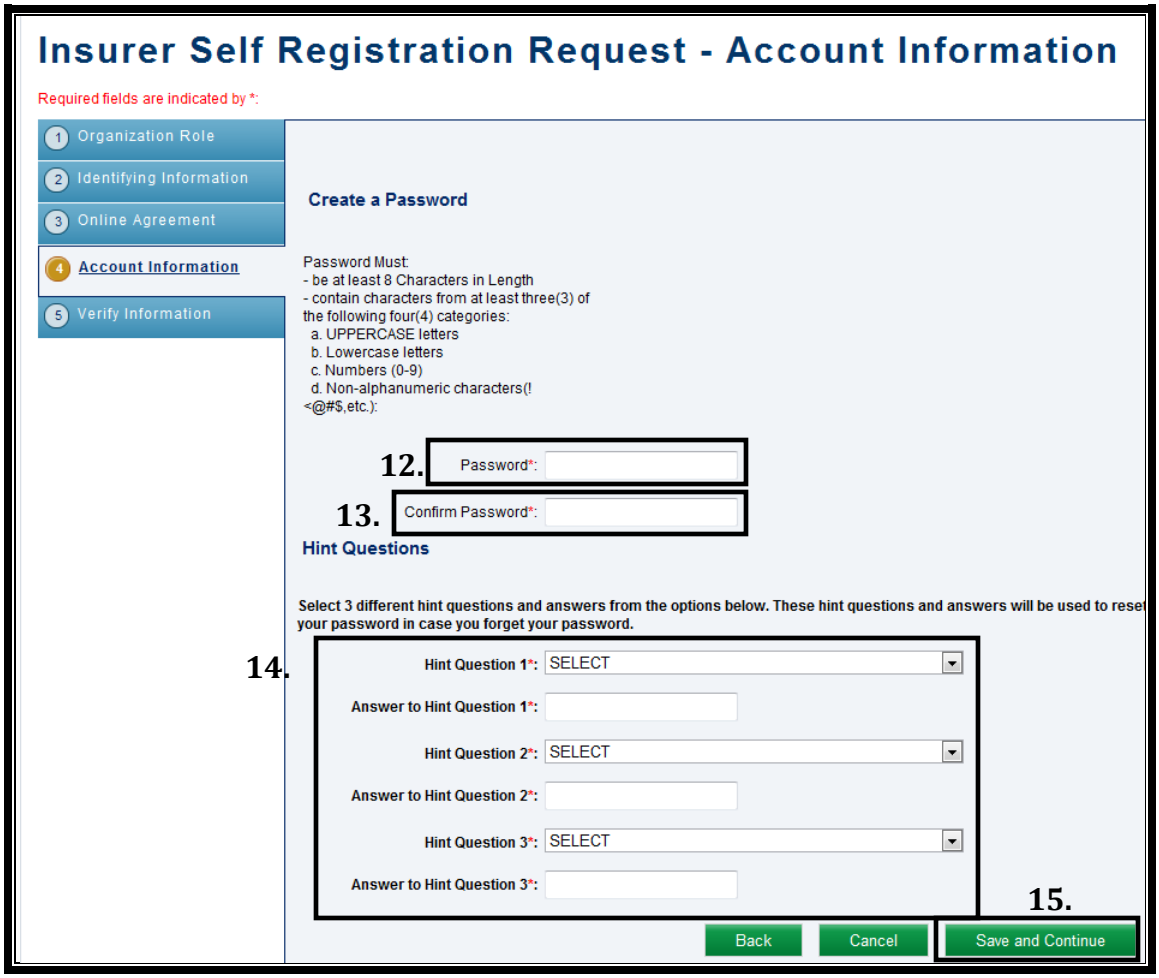

Figure 6: Step 4: Account Information: Non-Administrative Insurer User

12. Enter a password in the **Password** field.
13. Re-enter the password in the **Confirm Password** field.
14. Press the arrow in the **Hint Question** drop-down fields and select a question. Enter the answers to the hint questions in the **Answer to Hint Question** fields.

NOTE: All **Hint Question** and **Hint Answer** fields must be completed.

NOTE: The **Hint Answer** field is not case sensitive.

15. Press **Save and Continue**. *The **Insurer Self-Registration Request - Verify Information** screen displays. (See Figure 7)*

STEP 5: VERIFY INFORMATION

This screen is the fifth and final step in the self-registration process for a non-administrative insurer user. It displays all of the information entered by the user. The user reviews the information for accuracy prior to submission.

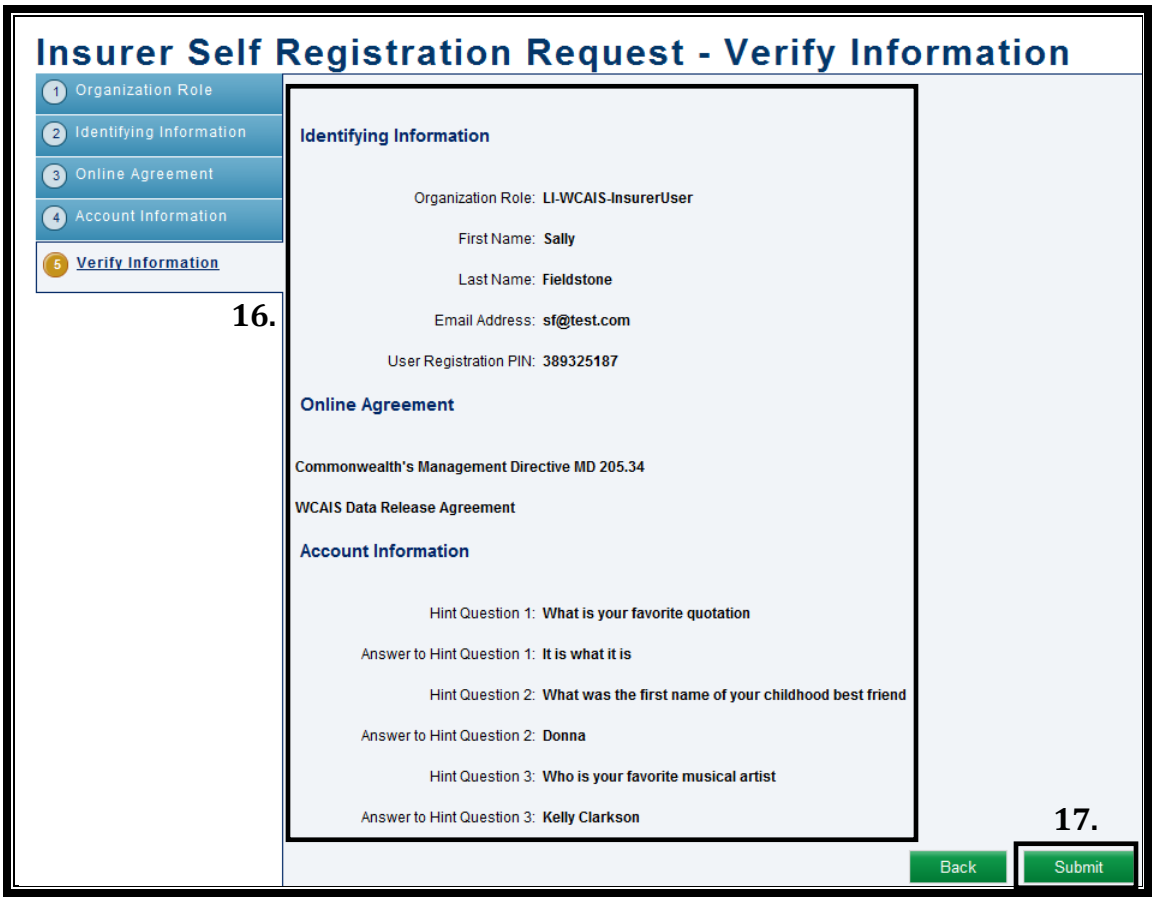

Figure 7: Step 5: Verify Information: Non-Administrative Insurer User

16. Review the information.

17. Press **Submit**. *The **Insurer Self-Registration Request - Request Sent for Approval** screen displays. (See Figure 8)*

REQUEST SENT FOR APPROVAL

This screen confirms the self-registration process. The request must be approved by the organization's administrator. WCAIS sends an email notification to the administrator to review the self-registration request and either approve or reject it. Once the self-registration request is processed, WCAIS sends an email notification to the user who submitted it. If approved, WCAIS provides the Keystone ID and directions to login to WCAIS.

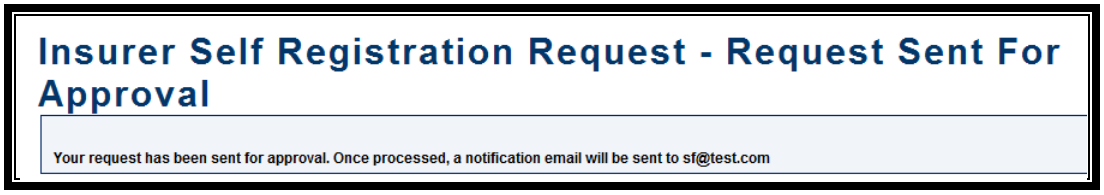

Figure 8: Insurer Self-Registration Request - Request Sent for Approval