

# Third Party Liability Web Portal Business Partner Dashboard Quick Reference Guide



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## Introduction to the TPL Web Portal Dashboard

After registering for an account (covered in the TPL Web Portal Registration User Guide) you will be provided a user ID. This user ID will be used to log into the TPL Web Portal Dashboard. The TPL Web Portal Dashboard (Dashboard for short) will be your single point of access to submit and review requests.

\*\* You receive an email when correspondence is available on your dashboard.

\*\* You can view the current status of a request on your dashboard.

Below is a screen shot of the "Start Page" you will be directed to once you sign into your new Dashboard.

The screenshot shows the dashboard homepage. Callout 1 points to the 'My Requests' link in the top navigation bar. Callout 2 points to the 'Search Option' section, which includes radio buttons for 'CIS#', 'Date Of Incident', 'Client Name', and 'Request Type', along with a search text input field and a 'Search' button. Callout 3 points to the 'My Requests' table, which lists various claims with columns for View, CIS#, Client Name, Date Of Incident, Request Type, Request Status, and Request Submitted.

View	CIS#	Client Name	Date Of Incident	Request Type	Request Status	Request Submitted
		ttty	11/10/2017	Special Needs Trust	Request is Received	01/06/2017 09:16:34
		sdtsaf	11/10/2017	Estate	Request is Received	01/06/2017 09:14:56
		uluu yhoys	09/14/2017	Casualty	Request is Received	01/06/2017 09:12:27
	002604037	PW-DEFGHJ klmnopqrstuwxyzAB W-LV-DEFGHJ klmnopqrstuwxyz	12/09/2016	Casualty	Request is Received	12/21/2016 14:39:28
	560179265	PV-DEFGHJ klmnopqrstuwxyzAB V-LV-DEFGHJ klmnopqrstuwxyz	12/09/2016	Casualty	Request is Received	12/21/2016 14:37:54
	560179265	FU-DEFGHJ klmnopqrstuwxyzAB U-LU-DEFGHJ klmnopqrstuwxyz	12/07/2016	Casualty	Request is Received	12/21/2016 14:35:51
	002604037	FT-DEFGHJ klmnopqrstuwxyzAB T-LT-DEFGHJ klmnopqrstuwxyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:29:23
	780145621	FS-DEFGHJ klmnopqrstuwxyzAB S-LS-DEFGHJ klmnopqrstuwxyz	12/05/2016	Casualty	Request is Received	12/21/2016 14:26:57
		Steven Rogers	12/09/2016	Estate	Request is Received	12/21/2016 11:39:42
		Jessica Jones	12/09/2016	Estate	Request is Received	12/21/2016 11:09:15

1 The dashboard homepage is labeled 'My Requests.'

2 User's can search their claims by selecting one of the radio buttons listed under 'Search Option' and entering search text or selecting a date of incident.

3 Claims that have been submitted by a user or assigned to that user are listed under 'My Requests.'

This screenshot is identical to the previous one but with additional callouts. Callout 4 points to the 'My Requests' link in the top navigation bar. Callout 5 points to the 'My Profile' link. Callout 6 points to the 'New Request' link. Callout 7 points to the 'Logout' link in the top right corner.

4 Users can navigate their list of claims by selecting the desired page.

5 Users can manage their profile information by selecting 'My Profile.'

6 Select 'New Request' to submit a claim.

7 Exit the dashboard by selecting 'Logout.'

## TPL Web Portal Dashboard Profile Management

The TPL Web Portal Dashboard also gives its user the ability to manage several aspects of their profile. The next few sections will go over all the functions

### 1. Accessing Profile options:

The screenshot shows the Pennsylvania Department of Human Services Third Party Liability web portal. At the top, there is a navigation bar with 'My Requests', 'My Profile', and 'New Request' tabs. A 'Logout' link is also visible. Below the navigation bar is a search bar with a '1' callout. Underneath the search bar are radio buttons for 'CIS#', 'Date Of Incident', 'Client Name', and 'Request Type'. A 'Search' button is located below the search bar. Below the search bar is a 'My Requests' section with a table of requests. The table has columns for 'View', 'CIS#', 'Client Name', 'Date Of Incident', 'Request Type', 'Request Status', and 'Request Submitted'. A '1' callout points to the 'My Profile' tab in the navigation bar.

View	CIS#	Client Name	Date Of Incident	Request Type	Request Status	Request Submitted
<input checked="" type="checkbox"/>		Itty	11/10/2017	Special Needs Trust	Request is Received	01/06/2017 09:16:34
<input checked="" type="checkbox"/>		sdtsf	11/10/2017	Estate	Request is Received	01/06/2017 09:14:56
<input checked="" type="checkbox"/>		silv yhayu	09/14/2017	Casualty	Request is Received	01/06/2017 09:12:27
<input checked="" type="checkbox"/>	002604037	FW-DEFGH j klmnopqrstuvmxyz W LW-DEFGH j klmnopqrstuvmxyz	12/08/2016	Casualty	Request is Received	12/21/2016 14:39:28
<input checked="" type="checkbox"/>	560179265	PV-DEFGH j klmnopqrstuvmxyz V LV-DEFGH j klmnopqrstuvmxyz	12/08/2016	Casualty	Request is Received	12/21/2016 14:37:54
<input checked="" type="checkbox"/>	560179265	FU-DEFGH j klmnopqrstuvmxyz U LU-DEFGH j klmnopqrstuvmxyz	12/07/2016	Casualty	Request is Received	12/21/2016 14:35:51
<input checked="" type="checkbox"/>	002604037	FT-DEFGH j klmnopqrstuvmxyz T LT-DEFGH j klmnopqrstuvmxyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:29:23
<input checked="" type="checkbox"/>	780145621	FS-DEFGH j klmnopqrstuvmxyz S LS-DEFGH j klmnopqrstuvmxyz	12/05/2016	Casualty	Request is Received	12/21/2016 14:26:57
<input checked="" type="checkbox"/>		Steven Rogers	12/09/2016	Estate	Request is Received	12/21/2016 11:39:42
<input checked="" type="checkbox"/>		Jessica Jones	12/09/2016	Estate	Request is Received	12/21/2016 11:09:15

**1** To view and edit your contact information select 'My Profile.'

## TPL Web Portal Dashboard Profile Management

### 2. Managing your Profile:

**pennsylvania**  
DEPARTMENT OF HUMAN SERVICES

Third Party Liability

My Requests My Profile New Request Logout

My Profile

**2** First Name: TestSAT - Compliance  
Middle Initial: Z  
Last Name: SPIDDMHF0BQ  
Phone: 4598527435  
Fax: 0987654321  
Email: test@test.com

Address Line 1: test-addr1  
Address 2: apt 101  
City: hbg  
State: PA Zip: 17110 - 1234

**3** Update/Submit

**2** The user's current contact information is displayed and can be edited if desired.

**3** If any updates are made, select 'Update/Submit' to save changes.

## TPL Web Portal Dashboard Claim Submission

### 3. Claim Submission

#### Submitting a Claim



View	CIS#	Client Name	Date Of Incident	Request Type	Request Status	Request Submitted
<input checked="" type="checkbox"/>		stty	11/10/2017	Special Needs Trust	Request is Received	01/06/2017 09:16:34
<input checked="" type="checkbox"/>		subof	11/10/2017	Estate	Request is Received	01/06/2017 09:12:27
<input checked="" type="checkbox"/>		ulu yhoju	09/14/2017	Casualty	Request is Received	01/06/2017 09:12:27
<input checked="" type="checkbox"/>	002604037	FW-DEF0thj klmr'opprstuvewyzAB W LW-DEF0thj klmr'opprstuvewyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:39:28
<input checked="" type="checkbox"/>	560179265	PV-DEF0thj klmr'opprstuvewyzAB Y LV-DEF0thj klmr'opprstuvewyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:37:54
<input checked="" type="checkbox"/>	560179265	FU-DEF0thj klmr'opprstuvewyzAB U LU-DEF0thj klmr'opprstuvewyz	12/07/2016	Casualty	Request is Received	12/21/2016 14:35:51
<input checked="" type="checkbox"/>	002604037	FT-DEF0thj klmr'opprstuvewyzAB T LT-DEF0thj klmr'opprstuvewyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:29:23
<input checked="" type="checkbox"/>	790145621	F8-DEF0thj klmr'opprstuvewyzAB S LS-DEF0thj klmr'opprstuvewyz	12/05/2016	Casualty	Request is Received	12/21/2016 11:39:42
<input checked="" type="checkbox"/>		Steven Rogers	12/09/2016	Estate	Request is Received	12/21/2016 11:39:42
<input checked="" type="checkbox"/>		Jessica Jones	12/09/2016	Estate	Request is Received	12/21/2016 11:09:15

1 Submit a claim by selecting 'New Request' on the dashboard homepage. Then select one of the claim types from the dropdown menu. Users can submit one of the following claim types:

Casualty

Estate

Special Needs Trust (SNT)

### 4. Submitting a Claim

For Casualty See **Appendix A**

For Estate See **Appendix B**

For Special Needs Trust See **Appendix C**

\*\* Only one claim should be submitted for each DOI. If you need an update, status, or have additional information on case, you will need to upload documents to existing request.

## TPL Web Portal Dashboard Viewing a Submitted Claim

### 5. Viewing a Submitted Claim

The screenshot shows the 'Third Party Liability' dashboard. At the top, there are navigation links: 'My Requests', 'My Profile', 'New Request', and 'Logout'. Below this is a 'Search Option' section with radio buttons for 'CIS#', 'Date Of Incident', 'Client Name', and 'Request Submitted'. A search text input field and a 'Search' button are also present. The main section is titled 'My Requests' and contains a table with the following columns: 'View', 'CIS#', 'Client Name', 'Date Of Incident', 'Request Type', 'Request Status', and 'Request Submitted'. The table lists several claims, with the first row having a blue circle with the number '1' next to its 'View' icon.

View	CIS#	Client Name	Date Of Incident	Request Type	Request Status	Request Submitted
		Itty	11/19/2017	Special Needs Trust	Request is Received	01/06/2017 09:16:34
		sdstar	11/19/2017	Estate	Request is Received	01/06/2017 09:14:56
		wlu yhuo	09/14/2017	Casualty	Request is Received	01/06/2017 09:12:27
	002604037	FN-DEFONJ kmmrppgrstuwxyzAB W LW-DEFONJ kmmrppgrstuwxyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:39:28
	560179265	FV-DEFONJ kmmrppgrstuwxyzAB V LV-DEFONJ kmmrppgrstuwxyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:37:54
	560179265	FU-DEFONJ kmmrppgrstuwxyzAB U LU-DEFONJ kmmrppgrstuwxyz	12/07/2016	Casualty	Request is Received	12/21/2016 14:35:51
	002604037	FT-DEFONJ kmmrppgrstuwxyzAB T LT-DEFONJ kmmrppgrstuwxyz	12/06/2016	Casualty	Request is Received	12/21/2016 14:29:23
	790149621	FB-DEFONJ kmmrppgrstuwxyzAB S LB-DEFONJ kmmrppgrstuwxyz	12/05/2016	Casualty	Request is Received	12/21/2016 14:26:57
		Steven Rogers	12/09/2016	Estate	Request is Received	12/21/2016 11:39:42
		Jessica Jones	12/09/2016	Estate	Request is Received	12/21/2016 11:09:15

1 When on the dashboard homepage the details of a claim can be displayed by selecting the icon in the 'View' column on the desired claim's line.

### 6. Updating Case info

The screenshot shows the details of a claim for 'Jessica Jones' with a date of incident of '12/09/2016' and a status of 'Request is Received'. The page is divided into several sections: 'Claim Administration', 'View Claim Information', 'File Upload Notes', and 'Upload Claim Documentation'. In the 'Claim Administration' section, there is a 'Current Owner' field with the value 'TestSAT - Compliance Z sPIDoH#FOBQ' and a 'Change Owner' button. A blue circle with the number '2' highlights this button. Other fields include 'Current Delegate' (None), 'Change Delegate' (Select a Delegate to Add/Remove), 'Add Delegate', 'Remove Delegate', and 'Cancel' buttons. The 'View Claim Information' section shows fields for 'Full Name' (Itty), 'Date of Birth' (01/10/2017), 'CIS/MA ID#', 'Request Type' (Special Needs Trust), 'SSN' (xxx-xx-2222), and 'Date Submitted' (1/6/2017 9:16:34 AM). The 'File Upload Notes' section contains instructions on file uploads. The 'Upload Claim Documentation' section has an 'Add files' button and a table for tracking uploads.

2 Once a claim is selected the claim details are displayed below.

## TPL Web Portal Dashboard Updating Claim Ownership

### 7. Updating Claim Ownership

The screenshot shows the 'Claim Administration' section of the TPL Web Portal. The 'Current Owner' field is set to 'TestSAT - Compliance Z sPIDoMhFOBQ'. A blue circle with the number '1' is overlaid on the 'Change Owner' button. Other fields include 'Current Delegate' (None), 'Change Delegate' (Select a Delegate to Add/Remove), 'Add Delegate', 'Remove Delegate', and 'Cancel' buttons. Below this is the 'View Claim Information' section with fields for Full Name, Date of Birth, CIS/MA ID#, SSN, Request Type, and Date Submitted. The 'File Upload Notes' section provides instructions on file uploads. The 'Upload Claim Documentation' section has an '+ Add files' button and a table with columns for File Name, File Type & Description, and Upload Progress or Cancel. An 'Upload Additional Files' button is at the bottom.

**1** To change a claim's owner the user must select the desired claim to view its details. Then select 'Change Owner.'

The screenshot shows the 'Claim Administration' section with the 'New Owner' dropdown menu open. The dropdown list contains 'Please Select Owner' and 'TestSAT - Compliance Z sPIDoMhFOBQ'. A blue circle with the number '2' is overlaid on the dropdown list. A blue circle with the number '3' is overlaid on the 'Save Owner Change' button. Other fields and buttons are the same as in the previous screenshot.

**2** Next, select one of the available owners from the drop-down list.

**3** Once the desired owner is chosen, select 'Save Owner Change' to confirm the change in ownership.



## TPL Web Portal Dashboard Updating Claim Ownership

Claim Administration

Current Owner: TestSAT - Compliance Z sPIDoMhF0BQ Change Owner

Current Delegate: None 1 Change Delegates

View Claim Information

Full Name: trty Date of Birth: 01/10/2017

CIS/MA ID#: SSN: xxx-xx-2222

Request Type: Special Needs Trust Date Submitted: 1/6/2017 9:16:34 AM

File Upload Notes

- A maximum of 5 files may be uploaded.
- The maximum file size for uploads is 5MB per file.
- The following file types may be uploaded: doc, docx, ppt, pptx, pdf, txt, rtf, bmp, gif, jpg, png, and tiff.

Upload Claim Documentation

+ Add files

File Name	File Type & Description	Upload Progress or Cancel
<span>Upload Additional Files</span>		

**1** To add, remove, or change a delegate select 'Change Delegates.'

Claim Administration

Current Owner: TestSAT - Compliance Z sPIDoMhF0BQ Change Owner

Current Delegate: None 2

Change Delegate: Select a Delegate to Add/Remove  
tpledgate delegate

3 Add Delegate Remove Delegate Cancel

View Claim Information

Full Name: trty Date of Birth: 01/10/2017

CIS/MA ID#: SSN: xxx-xx-2222

Request Type: Special Needs Trust Date Submitted: 1/6/2017 9:16:34 AM

File Upload Notes

- A maximum of 5 files may be uploaded.
- The maximum file size for uploads is 5MB per file.
- The following file types may be uploaded: doc, docx, ppt, pptx, pdf, txt, rtf, bmp, gif, jpg, png, and tiff.

Upload Claim Documentation

+ Add files

File Name	File Type & Description	Upload Progress or Cancel
<span>Upload Additional Files</span>		

**2** Select the desired delegate from the drop-down list.

**3** Select 'Add Delegate' or 'Remove Delegate' to confirm the change of delegate.

## TPL Web Portal Dashboard Contact Info

### 8. Third Party Liability Web Portal Helpdesk Info:

For technical or procedural information relating to the Third Party Liability Web Portal Dashboard or any other TPL Web Portal related issues, please contact:

[TPLwebportalhelpdesk@pa.gov](mailto:TPLwebportalhelpdesk@pa.gov)

## TPL Web Portal Dashboard Appendix A – Casualty

### Casualty case submission:

- Please note that all required fields have a red indicator next to them.
- Even if the field is not required, please fill all forms to the best of your knowledge.

The screenshot shows the 'Casualty Information' form. At the top, there are navigation tabs: '1. Casualty Info', '2. Attorney Info', '3. Insurance Info', '4. Uploads', and '5. Finish'. The 'Casualty Information' section contains fields for Last Name, First Name, MI, CIS/MA ID#, SSN, Date of Birth, and Date of Incident. The 'Incident Type' section has a dropdown menu for 'Type of Incident'. The 'Injury Information' section includes a note: 'Be sure to select all injuries that apply to this incident (injuries must be selected one at a time)'. It features a table with 'Injury Location' and 'Description of Injury' columns, and an 'Add to List' button. Below the table is an 'Injury Selection List' table. At the bottom, there is a checkbox for 'Has Client finished treating?' and a 'Next' button.

The next screen will prompt you for attorney and defendant information. This is the attorney representing the client.

The screenshot shows the 'Plaintiff Attorney Information' form. At the top, there are navigation tabs: '1. Casualty Info', '2. Attorney Info', '3. Insurance Info', '4. Uploads', and '5. Finish'. The 'Plaintiff Attorney Information' section contains fields for Name, Firm, Phone, Fax, Email, Address Line 1, Address Line 2, City, State, Zip, and Docket/Case #. Below this section is a 'Defendant Attorney Information' section with an 'Add Defendant Attorney' button. At the bottom, there is a disclaimer: 'Disclaimer: By Clicking this "Submit Information" button, you are entering a case into the Third Party Liability (TPLs) system.' and 'Previous' and 'Next' buttons.

## TPL Web Portal Dashboard Appendix A – Casualty

This next screen will give you the opportunity to provide any applicable insurance information.

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Third Party Liability - Casualty

My Requests My Profile New Request - Logout

1. Casualty Info 2. Attorney Info 3. Insurance Info 4. Uploads 5. Finish

**Insurance Information**

First Party Insurance  
 Third Party Insurance  
 Un-Insured/Under-Insured Motorists(UIM)

Previous Next

The next screen depicts the detail information you will be asked to provide once an insurance type is selected.

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Third Party Liability - Casualty

My Requests My Profile New Request - Logout

1. Casualty Info 2. Attorney Info 3. Insurance Info 4. Uploads 5. Finish

**Insurance Information**

First Party Insurance  
 Third Party Insurance  
 Un-Insured/Under-Insured Motorists(UIM)

**First Party Insurance Information**

Company:   
Adjuster Name:   
Phone:   
Fax:   
Policy Holder:

Address Line 1:   
Address Line 2:   
City:   
State:  State  Zip:  -   
Claim #:

Previous Next

## TPL Web Portal Dashboard Appendix A – Casualty

On this next screen you will be prompted to upload all applicable documentation for this case.

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Third Party Liability - Casualty

My Requests My Profile New Request Logout

1. Casualty Info 2. Attorney Info 3. Insurance Info 4. Uploads 5. Finish

**File Upload Notes**

- A maximum of 10 files may be uploaded.
- The maximum file size for uploads is 5MB per file.
- The following file types may be uploaded: doc, docx, ppt, pptx, pdf, txt, rtf, bmp, gif, jpg, png, and tiff.

**Upload Casualty Documentation**

+ Add files

File Name	File Type & Description	Upload Progress or Cancel
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Previous Submit

After you have submitted all applicable documentation you will be prompted to enter any “related” cases.

For example:

Client A and B are in the same auto accident. After completing client A’s information, select ‘Yes’ to enter client B’s information.

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Third Party Liability - Casualty

My Requests My Profile New Request Logout

1. Casualty Info 2. Attorney Info 3. Insurance Info 4. Uploads 5. Finish

Your Case: [Name] [Address] [City] [State] [Zip]

**Casualty Claim Linking**

Do you have another claim to link to this claim from the same household?

Yes No

## TPL Web Portal Dashboard Appendix A – Casualty

After you have completely entered all case information and clicked submit, you will be presented with a verification screen. This can be saved as proof of submission.



- 1. Casualty Info
- 2. Attorney Info
- 3. Insurance Info
- 4. Uploads
- 5. Finish

Your Casualty Claim Request has been successfully submitted for: test test

01/13/2017 15:13:15

## TPL Web Portal Dashboard Appendix B – Estate

### Estate case submission:

- Please note that all required fields have a red indicator next to them.
- Even if the field is not required, please fill all forms to the best of your knowledge.

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Third Party Liability - Estate Statement of Claim

1. Decedent Info 2. Attorney Info 3. Executor Info 4. Asset Info 5. Uploads 6. Finish

**Notice of Intent**

Fully completing and submitting this form constitutes official notice to the department to request a statement of the department's claim (SOC) for Medical Assistance (MA) received by the decedent (see 62 P.S. 1412 et al).

Please note that if the department determines that the gross value of the estate assets are subject to estate recovery, a department representative will contact you. However, if the department's review determines that the estate assets are not subject to estate recovery, you will receive a letter indicating why the department is not pursuing recovery.

**Decedent's Information**

Full Name: \*  Date of Birth: \*  Date of Death: \*   
CISMA ID# (if known):  SSN: \*

**Decedent's Last Known Address**

Address Line 1:  City:   
Address Line 2:  State:  Zip:  -

Next

## TPL Web Portal Dashboard Appendix B – Estate

This next screen will prompt you for attorney information. This is the attorney representing the client.

The screenshot shows the Pennsylvania Department of Human Services logo and the title "Third Party Liability - Estate Statement of Claim". A progress bar at the top indicates the current step is "2. Attorney Info". Below the progress bar, the "Attorney Information" section is highlighted. The form contains the following fields:

- Name:
- Firm:
- Phone:
- Fax:
- Email:
- Address Line 1:
- Address Line 2:
- City:
- State:  (dropdown)
- Zip:  -
- Attorney File #:

Navigation buttons "Previous" and "Next" are located at the bottom right of the form.

You will now be asked to provide information about the executor of the estate of the estate being reported. You can add up to 5 executors.

The screenshot shows the Pennsylvania Department of Human Services logo and the title "Third Party Liability - Estate Statement of Claim". A progress bar at the top indicates the current step is "3. Executor Info". Below the progress bar, the "Executor Information" section is highlighted. The form contains the following fields:

- Name:
- Relationship:
- Phone:
- Email:
- Address Line 1:
- Address Line 2:
- City:
- State:  (dropdown)
- Zip:  -

Buttons "Remove this Executor" and "Add Executor" are located above and below the form fields, respectively. Navigation buttons "Previous" and "Next" are located at the bottom right of the form.



## TPL Web Portal Dashboard Appendix B – Estate

The next two screens will ask you for specific information regarding the estate you are reporting. The more information you can provide (including dollar amounts), the faster your request can be processed.

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Third Party Liability - Estate Statement of Claim

1. Decedent Info 2. Attorney Info 3. Executor Info **4. Asset Info** 5. Uploads 6. Finish

**Property/Real Estate owned by Decedent**  
Add Property/Real Estate

**Bank Accounts**  
Add Bank Account

**Nursing Home Personal Care Account**  
 Yes  No

**Burial Accounts**  
Add Burial Account

**Stocks/Bonds/Other (Annuities, Mutual Funds, Savings Bonds, etc.)**  
Add Stock/Bond/Other

## TPL Web Portal Dashboard Appendix B – Estate

Below is a continuation of the previous screen. Please note that you must accept (check) the acknowledgement box to proceed.

Stocks/Bonds/Other(Annuities, Mutual Funds, Savings Bonds, etc.)

Add Stock/Bond/Other

Life Insurance Policies

Add Life Insurance Policy

Litigation Proceeds

Add Litigation Proceeds

I acknowledge that the information I have supplied on this form is subject to the penalties set forth in 18PA.C.C 4909 (relating to unsworn falsification to authorities.)

Previous Next

Below is the final submission screen. On this screen you will be given the opportunity to provide applicable documentation. Like the previous screens, the more pertinent documentation you provide, the faster your request can be processed.

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Third Party Liability - Estate Statement of Claim

1. Decedent Info 2. Attorney Info 3. Executor Info 4. Asset Info 5. Uploads 6. Finish

**File Upload Notes**

- A maximum of 40 files may be uploaded.
- The maximum file size for uploads is 5MB per file.
- The following file types may be uploaded: doc, docx, ppt, pptx, pdf, txt, rtf, bmp, gif, jpg, png, and tiff.

**Upload Estate Documentation**

+ Add files Please Add all Documentation and files prior to clicking the submit button

File Name	File Type & Description	Upload Progress or Cancel
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Previous Submit

## TPL Web Portal Dashboard Appendix B—Estate

After you have completely entered all request information and clicked submit, you will be presented with a verification screen. This can be saved as proof of submission.

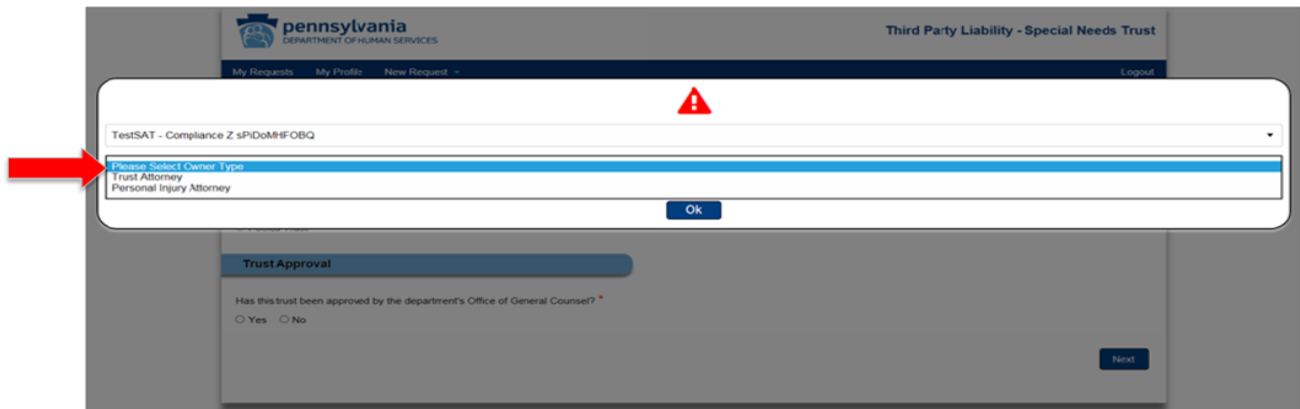
The screenshot displays the Pennsylvania Department of Human Services web portal interface. At the top left is the state logo and the text "pennsylvania DEPARTMENT OF HUMAN SERVICES". At the top right is the page title "Third Party Liability - Estate Statement of Claim". Below the header is a navigation bar with six buttons: "1. Decedent Info", "2. Attorney Info", "3. Executor Info", "4. Asset Info", "5. Uploads", and "6. Finish". The "6. Finish" button is highlighted in dark blue. Below the navigation bar, the main content area displays the following text: "Your Estate Recovery Request has been successfully submitted for: sasasasas", the timestamp "03/13/2017 13:51:29", and the instruction "Please close this browser window when finished."

## TPL Web Portal Dashboard Appendix C – Special Needs Trust

### SNT submission:

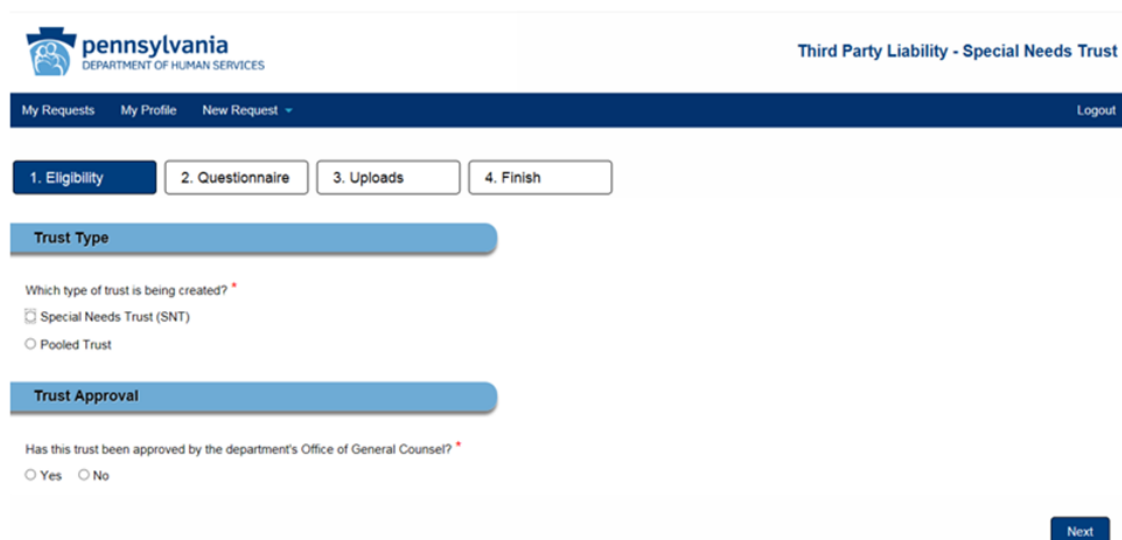
- Please note that all required fields have a red indicator next to them.
- Even if the field is not required, please fill all forms to the best of your knowledge.

First you will be prompted to choose an 'Owner Type.' Select 'Trust Attorney' or 'Personal Injury Attorney' from the drop-down menu.



The screenshot shows the Pennsylvania Department of Human Services Third Party Liability - Special Needs Trust portal. A dropdown menu is open, displaying the prompt "Please Select Owner Type" with two options: "Trust Attorney" and "Personal Injury Attorney". A red arrow points to the dropdown menu. The background shows a "Trust Approval" section with a question: "Has this trust been approved by the department's Office of General Counsel?" and radio buttons for "Yes" and "No".

Next, select the type of trust and indicate whether the trust has been approved by the Department's Office of General Counsel. Please note: Pooled trusts cannot be submitted via the TPL Web Portal. Please submit via fax, 717-772-6553 or mail to Third Party Liability, Special Needs Trust Depository, PO Box 8486, Harrisburg PA, 17105



The screenshot shows the Pennsylvania Department of Human Services Third Party Liability - Special Needs Trust portal. The "Trust Type" section is highlighted, showing the question "Which type of trust is being created?" with two radio button options: "Special Needs Trust (SNT)" (which is selected) and "Pooled Trust". Below this is the "Trust Approval" section with the question "Has this trust been approved by the department's Office of General Counsel?" and radio buttons for "Yes" and "No". A "Next" button is visible at the bottom right.

## TPL Web Portal Dashboard Appendix C – Special Needs Trust

Next, complete the questionnaire. Please note that all required fields have a red indicator next to them.

Even if the field is not required, please fill in all items to the best of your knowledge.

The screenshot shows the 'Third Party Liability - Special Needs Trust' questionnaire form. At the top left is the Pennsylvania Department of Human Services logo. The page title is 'Third Party Liability - Special Needs Trust'. A navigation bar includes 'My Requests', 'My Profile', 'New Request', and 'Logout'. Below this is a progress indicator with four steps: '1. Eligibility', '2. Questionnaire' (highlighted), '3. Uploads', and '4. Finish'. The form is divided into three main sections: 'Trust Information', 'Contact Information of Attorney or Firm that Drafted Trust', and 'Trustee Information'. The 'Trust Information' section includes fields for Beneficiary Name, Date of Birth, CISMA ID#, SSN, Date of Trust Execution, and Amount Placed in Trust, along with radio buttons for the source of funds: Personal Injury, Inheritance, and Other. The 'Contact Information of Attorney or Firm that Drafted Trust' section includes fields for Name, Firm, Phone, Fax, Email, Address Line 1, Address Line 2, City, State, and Zip. The 'Trustee Information' section features a 'Remove Trustee' form with fields for Name, Phone, Fax, Email, Address Line 1, Address Line 2, City, State, and Zip, and an 'Add Trustee' button. At the bottom right are 'Previous' and 'Next' buttons.

## TPL Web Portal Dashboard Appendix C – Special Needs Trust

On this next screen you will be prompted to upload all applicable documentation for this request.

The screenshot shows the 'Uploads' step of the TPL Web Portal. At the top left is the Pennsylvania Department of Human Services logo. At the top right is the text 'Third Party Liability - Special Needs Trust'. Below the logo is a navigation bar with 'My Requests', 'My Profile', and 'New Request' (with a dropdown arrow), and a 'Logout' link on the far right. A progress bar below the navigation bar shows four steps: '1. Eligibility', '2. Questionnaire', '3. Uploads' (highlighted in blue), and '4. Finish'. Below the progress bar is a section titled 'File Upload Notes' with a blue header. It contains three bullet points: 'A maximum of 5 files may be uploaded.', 'The maximum file size for uploads is 5MB per file.', and 'The following file types may be uploaded: doc, docx, ppt, pptx, pdf, txt, rtf, bmp, gif, jpg, png, and tiff.' Below the notes is a section titled 'Upload Trust Documentation' with a blue header and a '+ Add files' button. Below this is a table with three columns: 'File Name', 'File Type & Description', and 'Upload Progress or Cancel'. At the bottom right of the form are 'Previous' and 'Submit' buttons.

After you have completely entered all request information and clicked submit, you will be presented with a verification screen. This can be saved as proof of submission.

The screenshot shows the 'Finish' step of the TPL Web Portal. At the top left is the Pennsylvania Department of Human Services logo. At the top right is the text 'Third Party Liability - Special Needs Trust'. Below the logo is a navigation bar with 'My Requests', 'My Profile', and 'New Request' (with a dropdown arrow), and a 'Logout' link on the far right. A progress bar below the navigation bar shows four steps: '1. Eligibility', '2. Questionnaire', '3. Uploads', and '4. Finish' (highlighted in blue). Below the progress bar is a confirmation message: 'Your Special Needs Trust Claim Request has been successfully submitted for: Steve' followed by the timestamp '01/19/2017 15:01:45'.