Third Party Liability Web Portal
Business Partner Dashboard
Quick Reference Guide

Third Party Liability Web Portal Table of Contents

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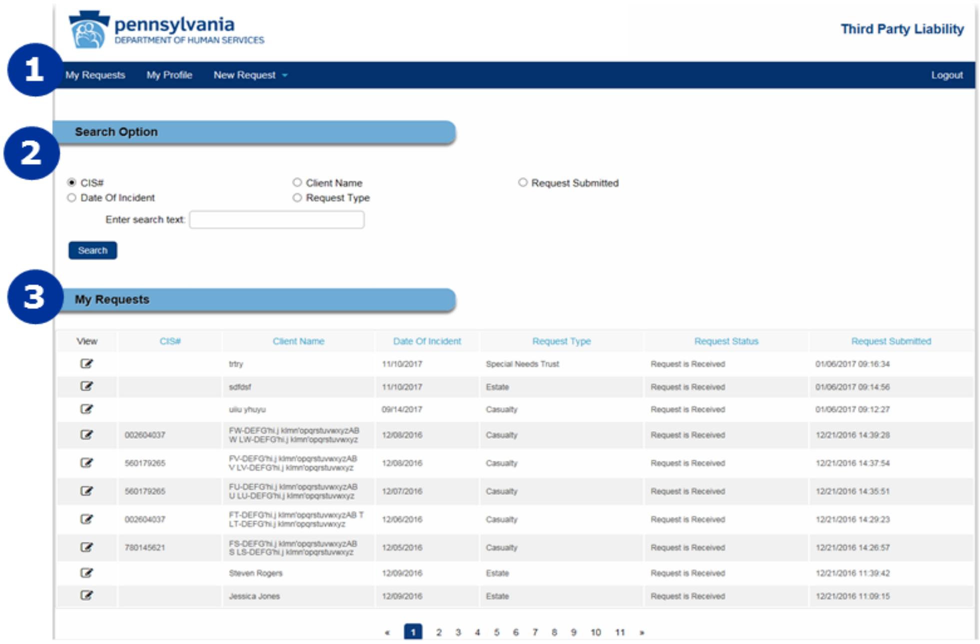
Introduction to the TPL Web Portal Dashboard

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.**

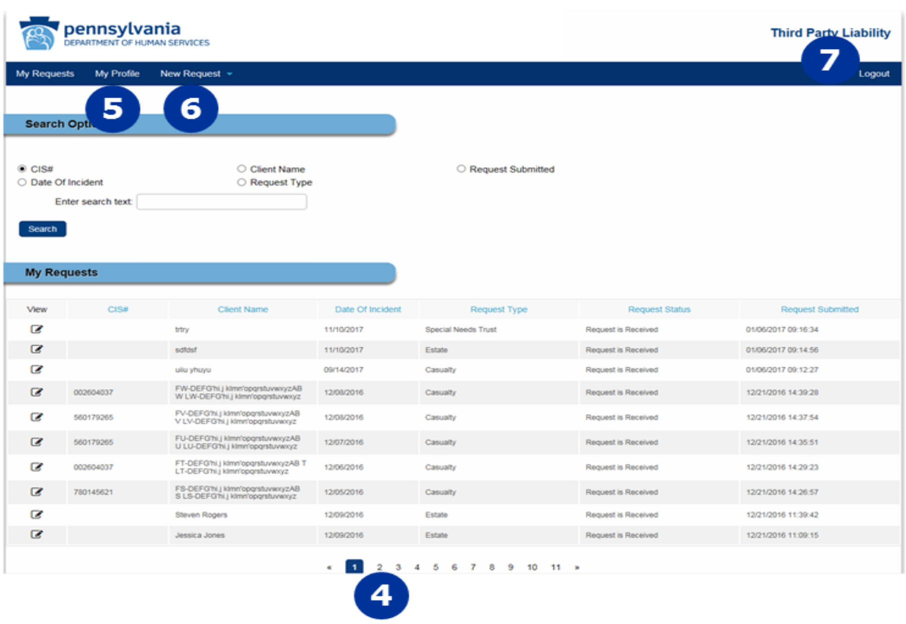
Below is a screen shot of the "Start Page" you will be directed to once you sign into your new Dashboard.



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.'



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

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

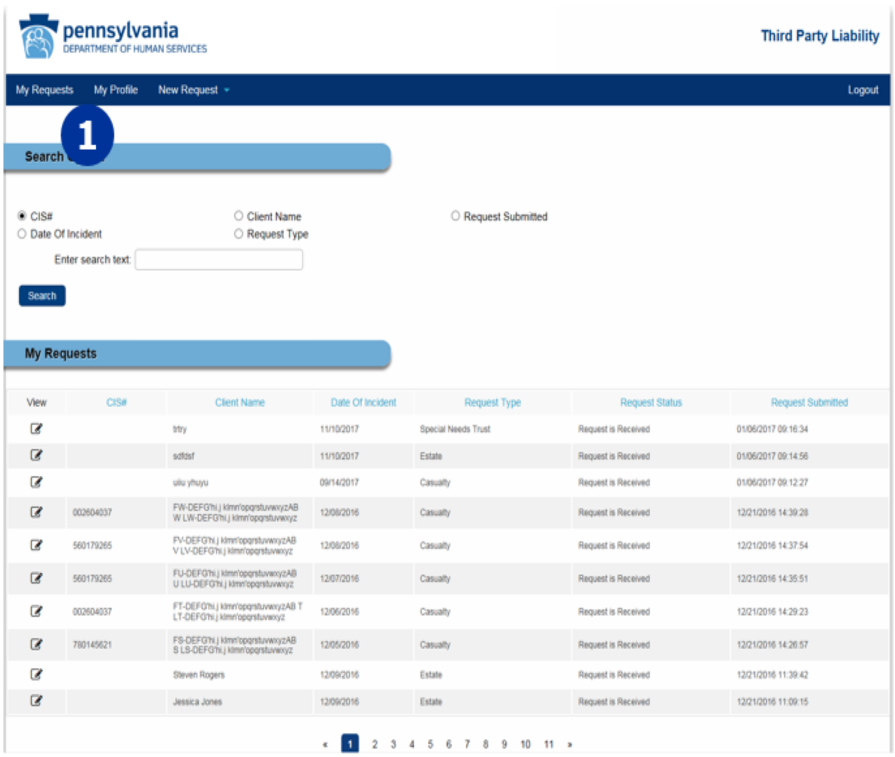
6 Select 'New Request' to submit a claim.

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

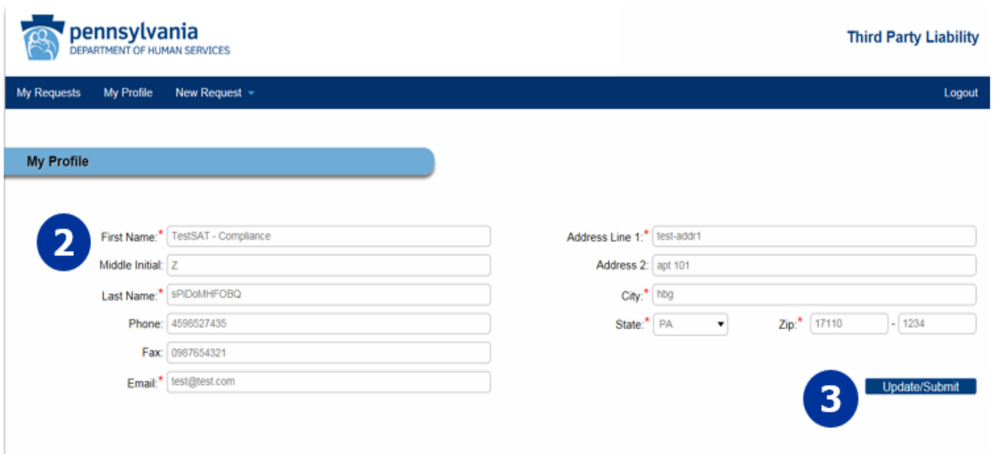
1. Accessing Profile options:



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

TPL Web Portal Dashboard Profile Management

2. Managing your Profile:



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

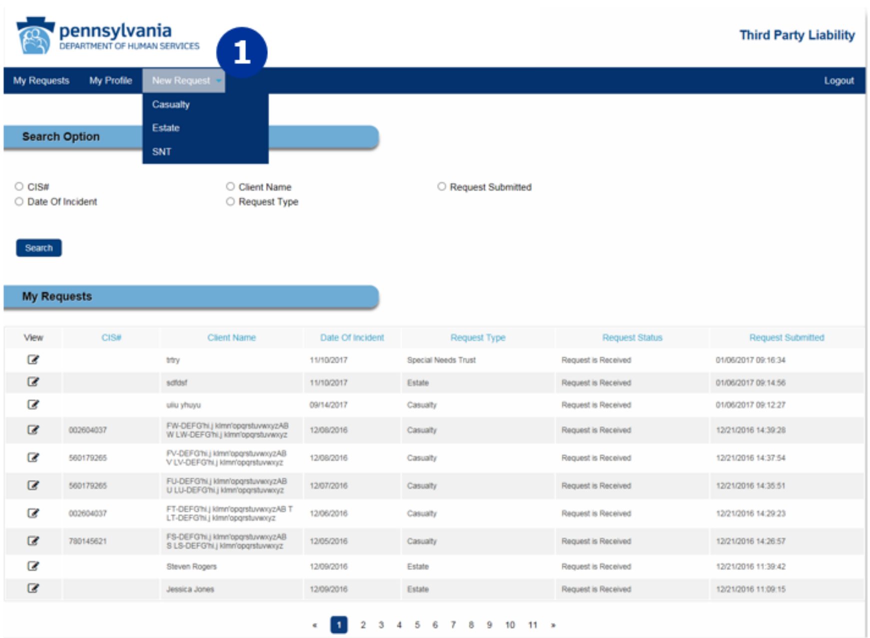
3 If any updates are made, select 'Update/Submit' to save changes.

TPL Web Portal Dashboard Claim Submission

3. Claim Submission

Submitting a Claim

pennsylvania
DEPARTMENT OF HUMAN SERVICES



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. <u>Submitting a Claim</u>

For Casualty See **Appendix A**

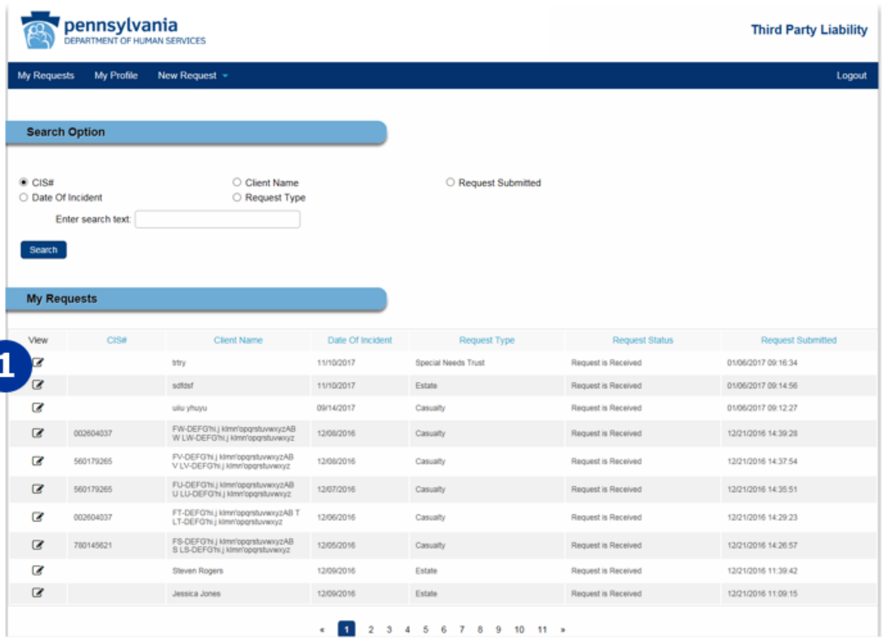
For Estate See **Appendix B**

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.

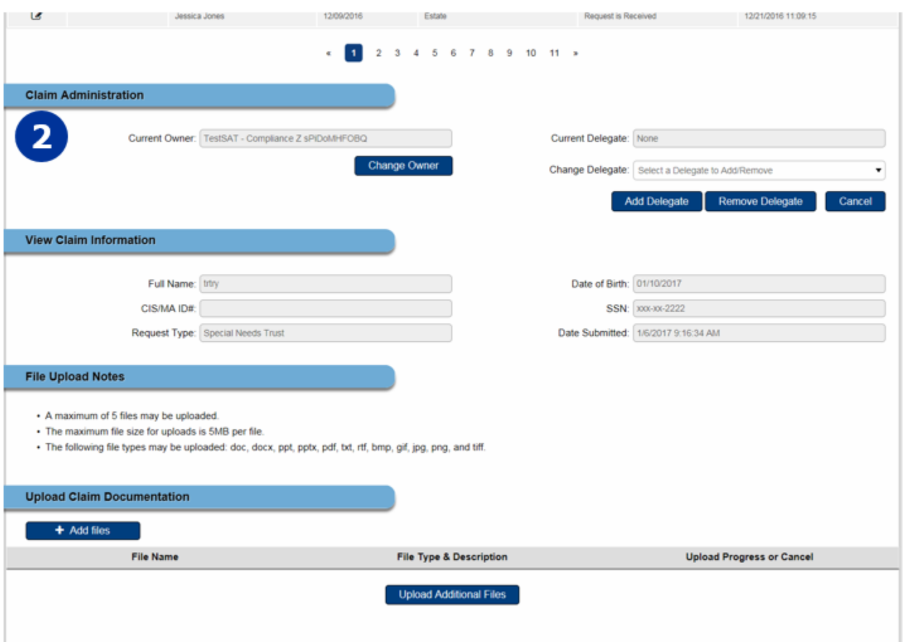
TPL Web Portal Dashboard Viewing a Submitted Claim

5. Viewing a Submitted Claim



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.

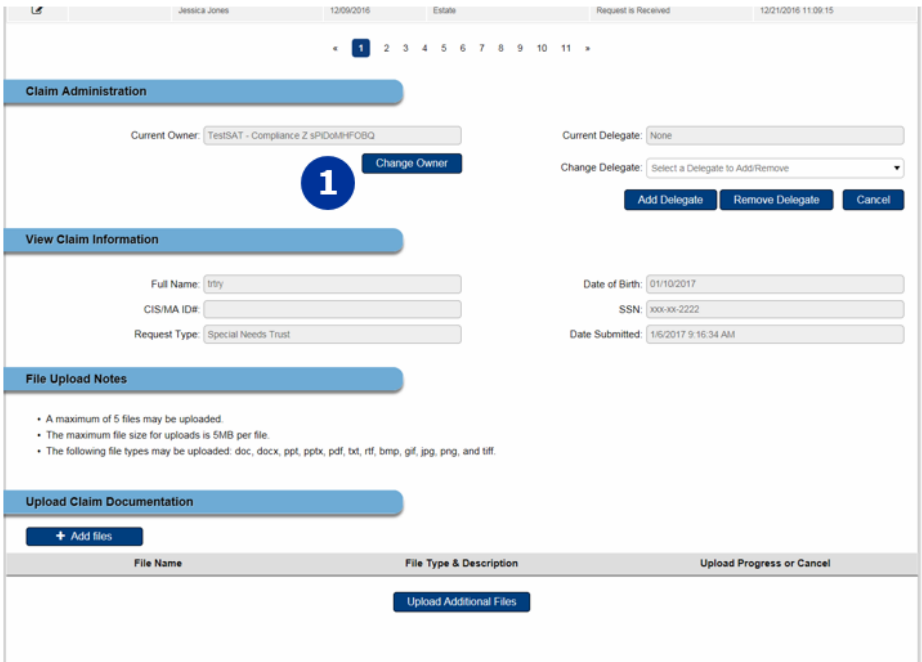
6. Updating Case info



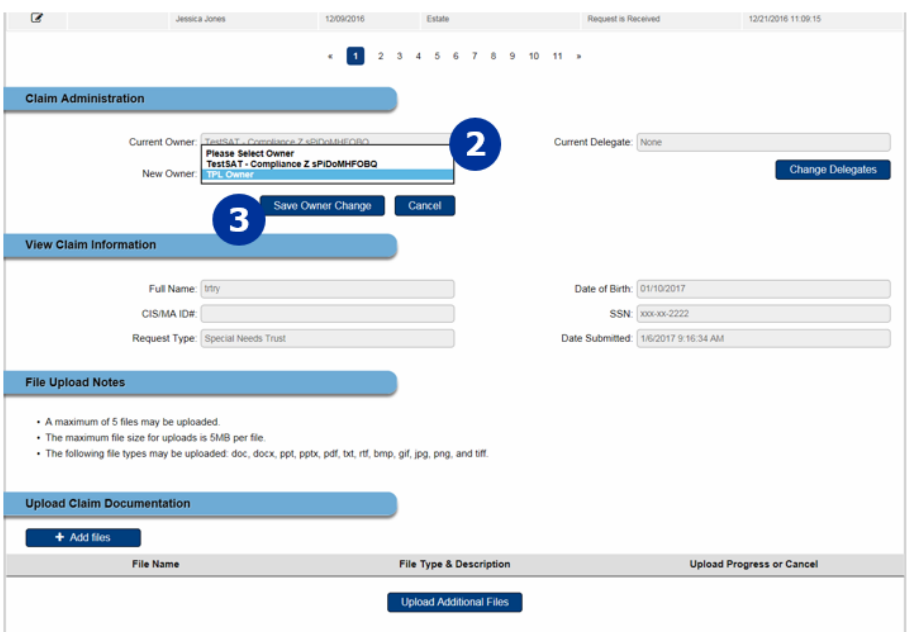
2 Once a claim is selected the claim details are displayed below.

TPL Web Portal Dashboard Updating Claim Ownership

7. Updating Claim Ownership



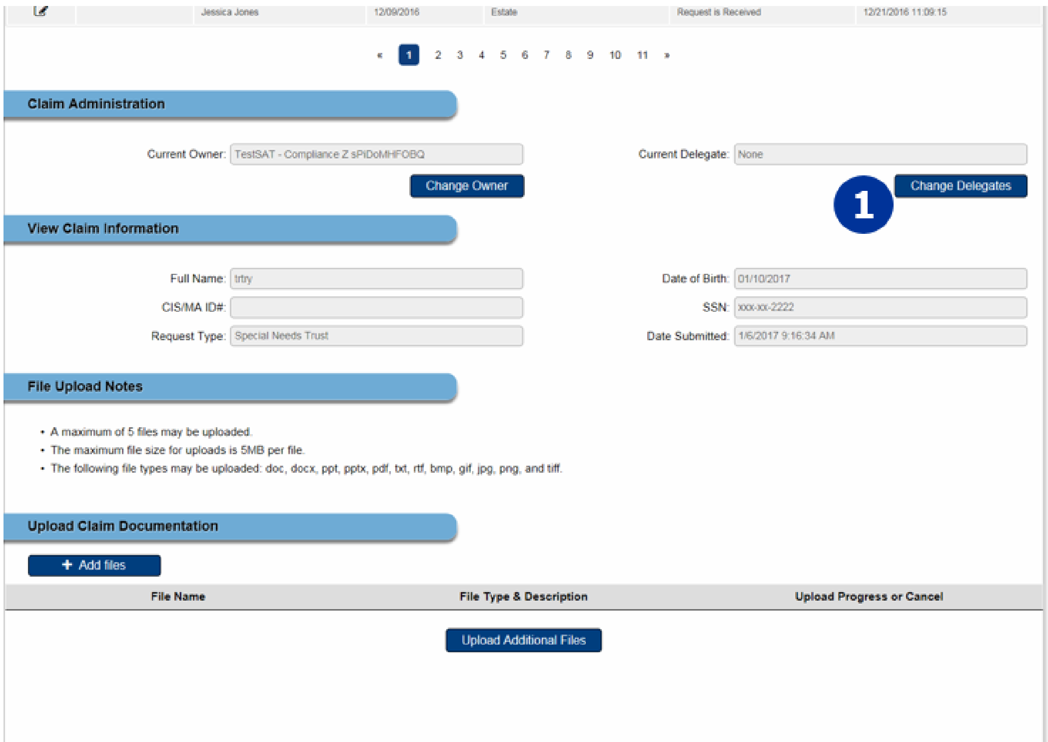
1 To change a claim's owner the user must select the desired claim to view it's details. Then select 'Change Owner.'



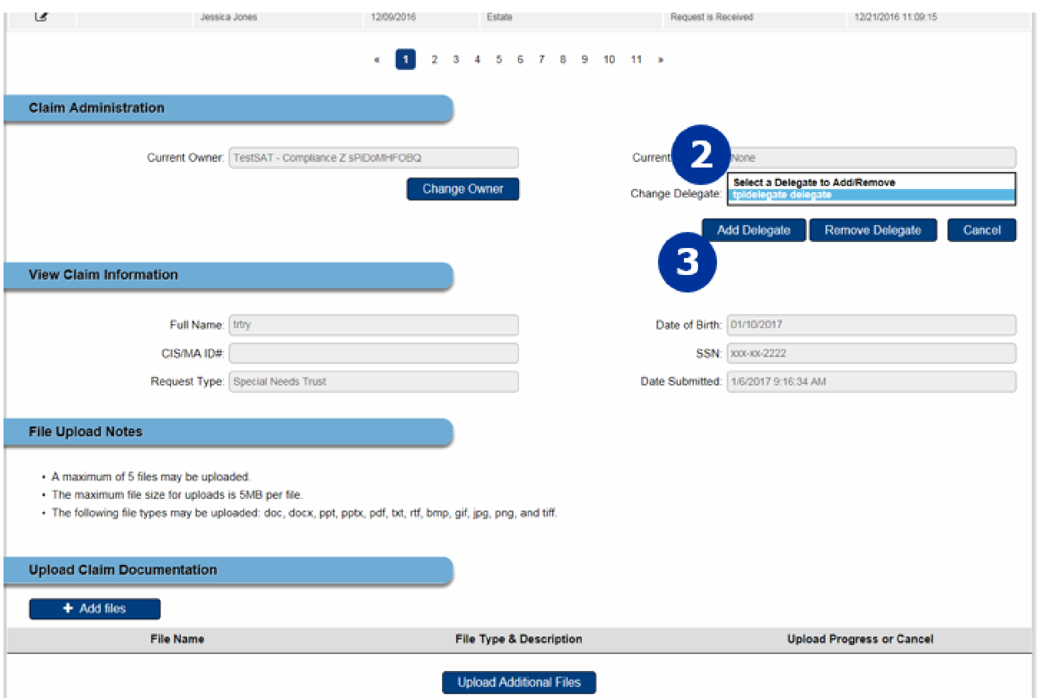
2 Next, select one of the available owners from the drop-down list.

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

TPL Web Portal Dashboard Updating Claim Ownership



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



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:

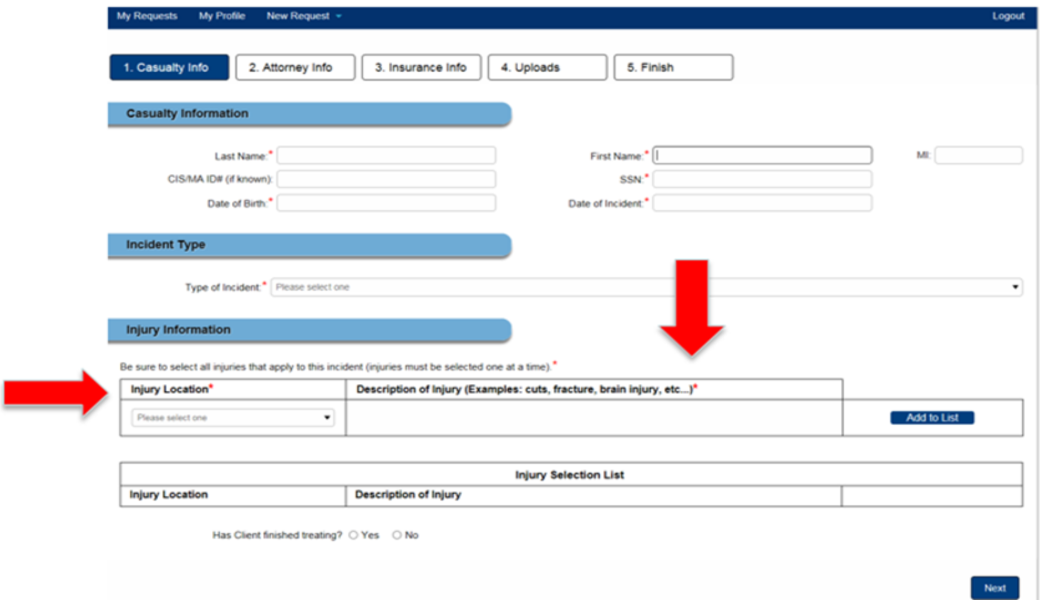
For technical or procedural information relating to the Third Party Liability Web Portal Dashboard or any other TPL Web Portal related issues, please contact:

TPLwebportalhelpdesk@pa.gov

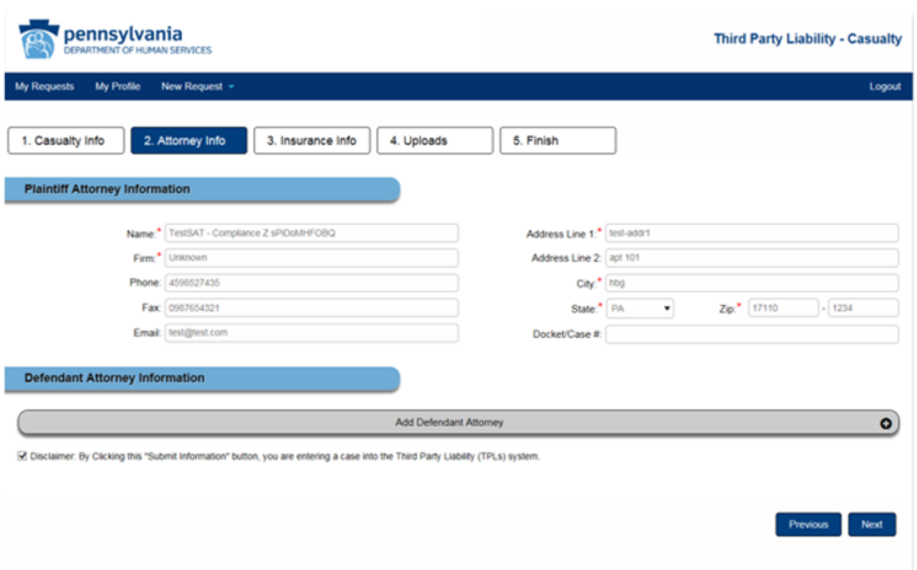
TPL Web Portal Dashboard Appendix A – Casualty

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.

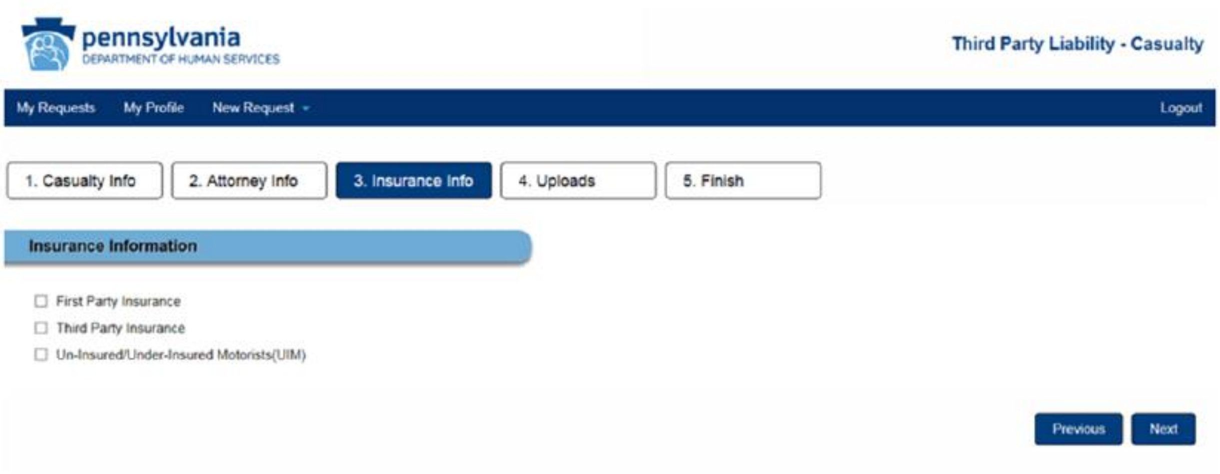


The next screen will prompt you for attorney and defendant information. This is the attorney representing the client.

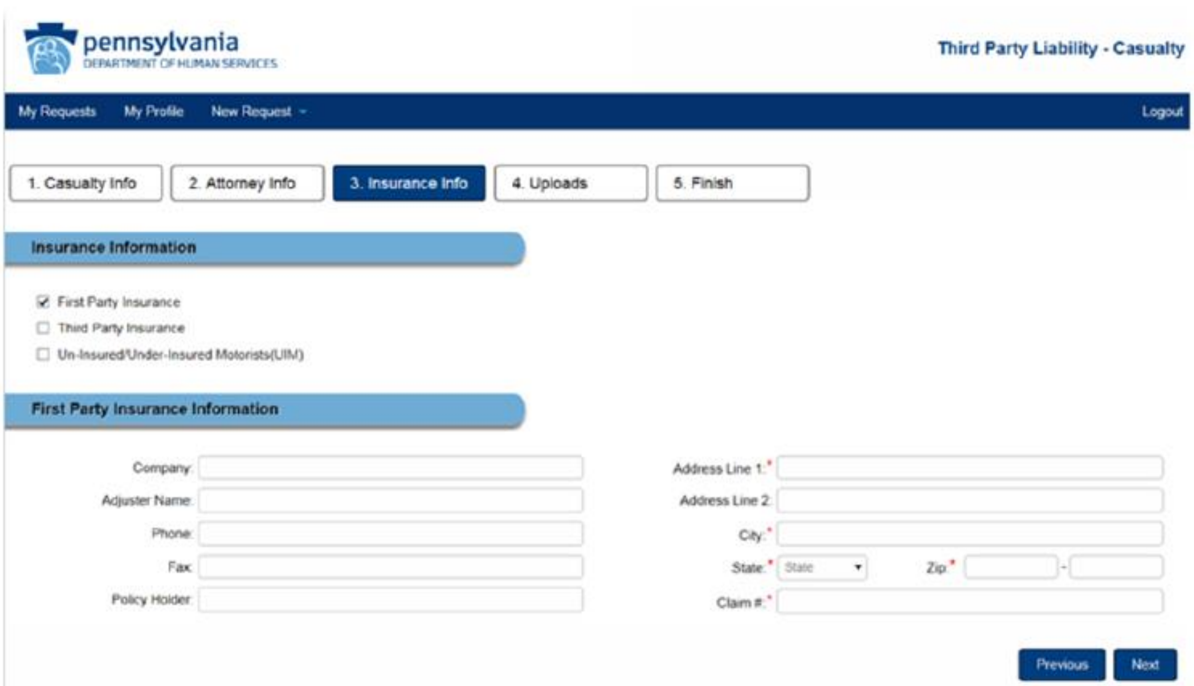


TPL Web Portal Dashboard Appendix A – Casualty

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



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

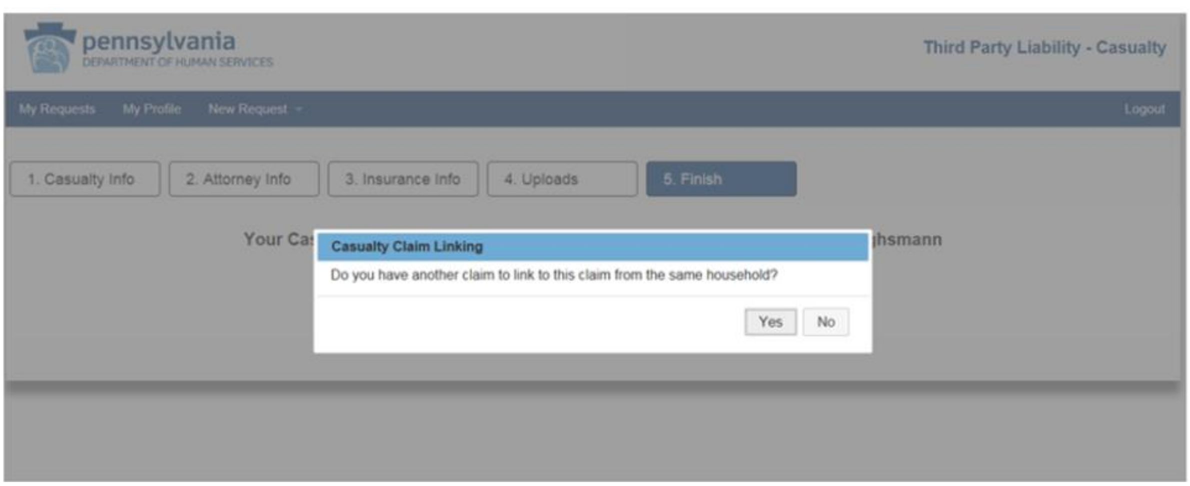


TPL Web Portal Dashboard Appendix A – Casualty

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

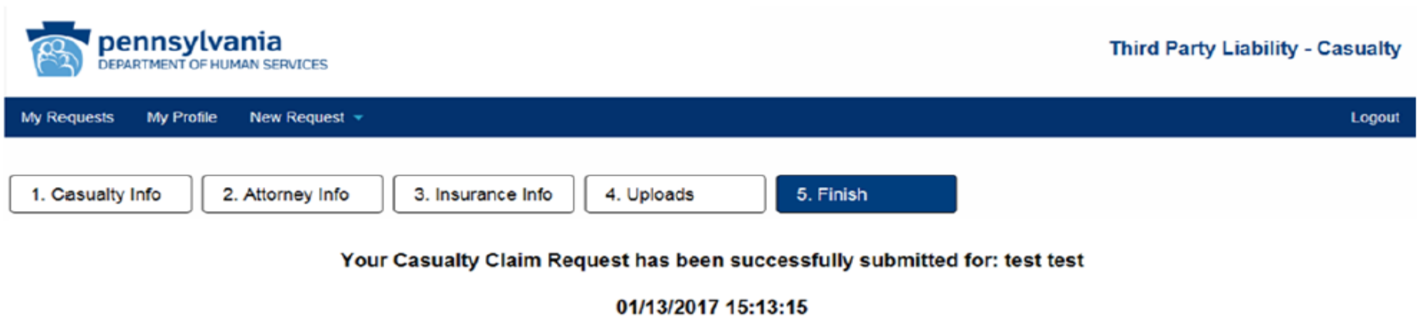
After you have submitted all applicable documentation you will be prompted to enter any “related” cases.

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.



TPL Web Portal Dashboard Appendix A – Casualty

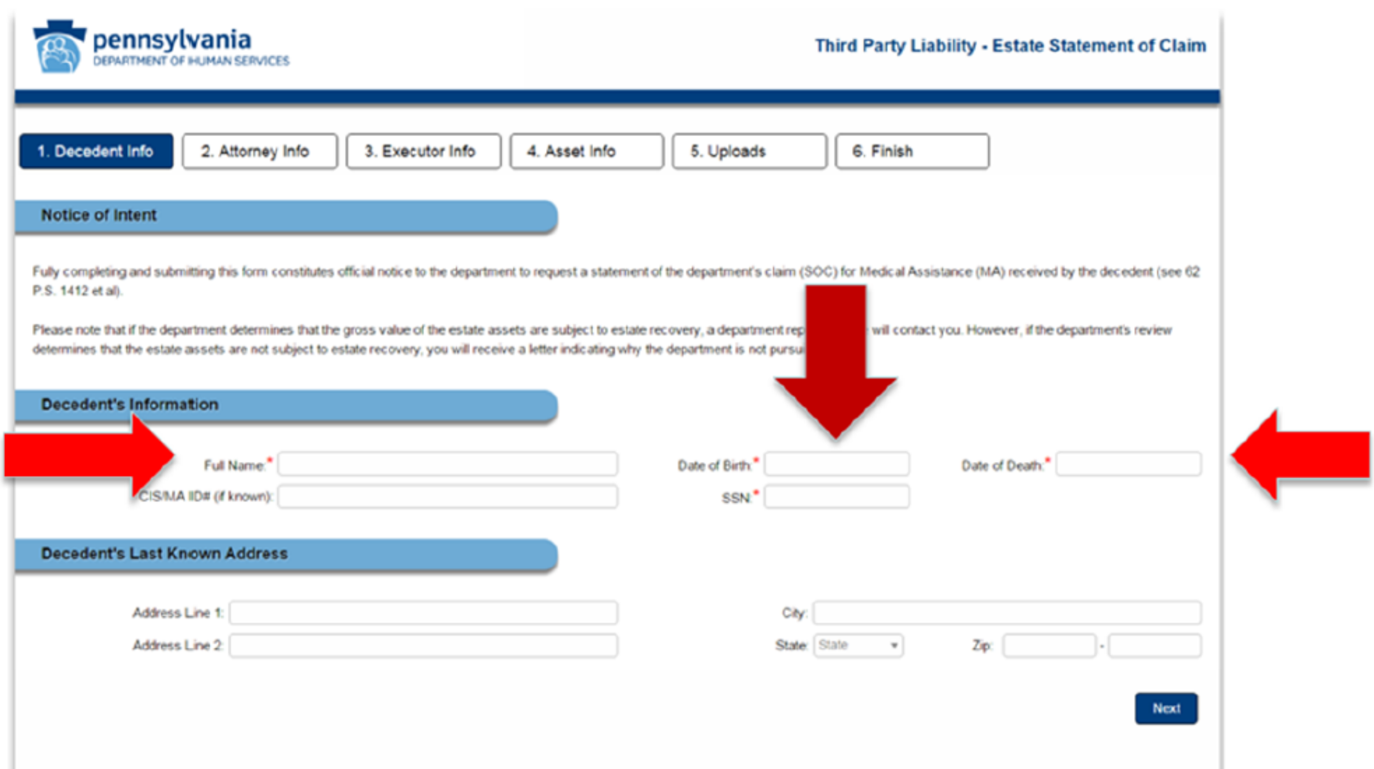
After you have completely entered all case information and clicked submit, you will be presented with a verification screen. This can be saved as proof of submission.



TPL Web Portal Dashboard Appendix B – Estate

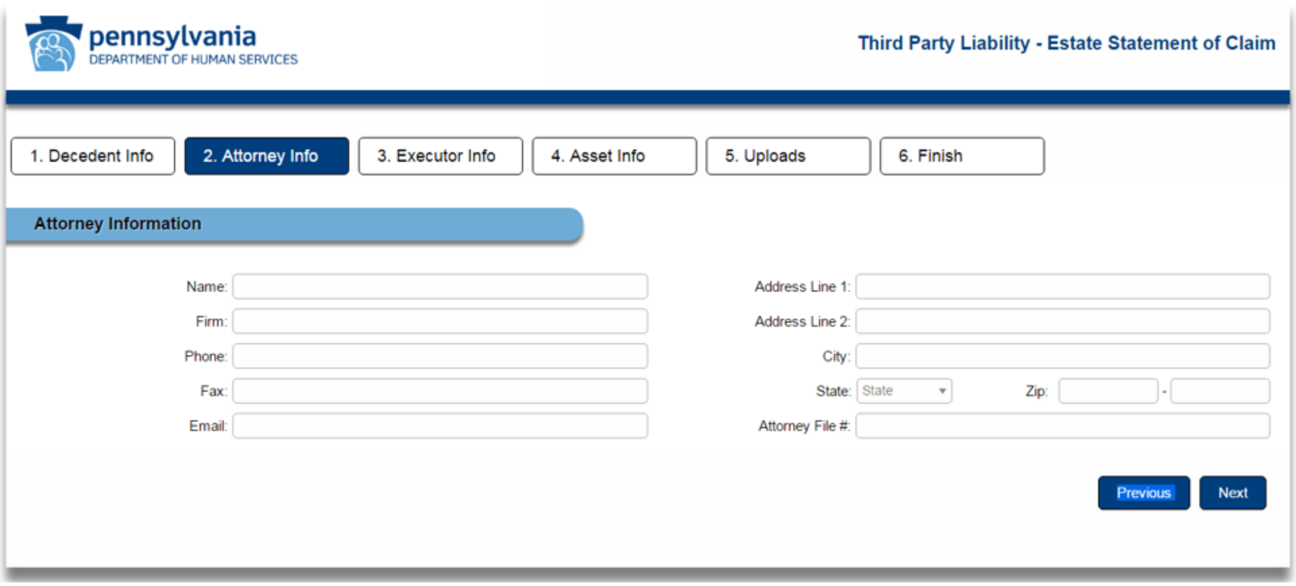
Estate case submission:

- 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.

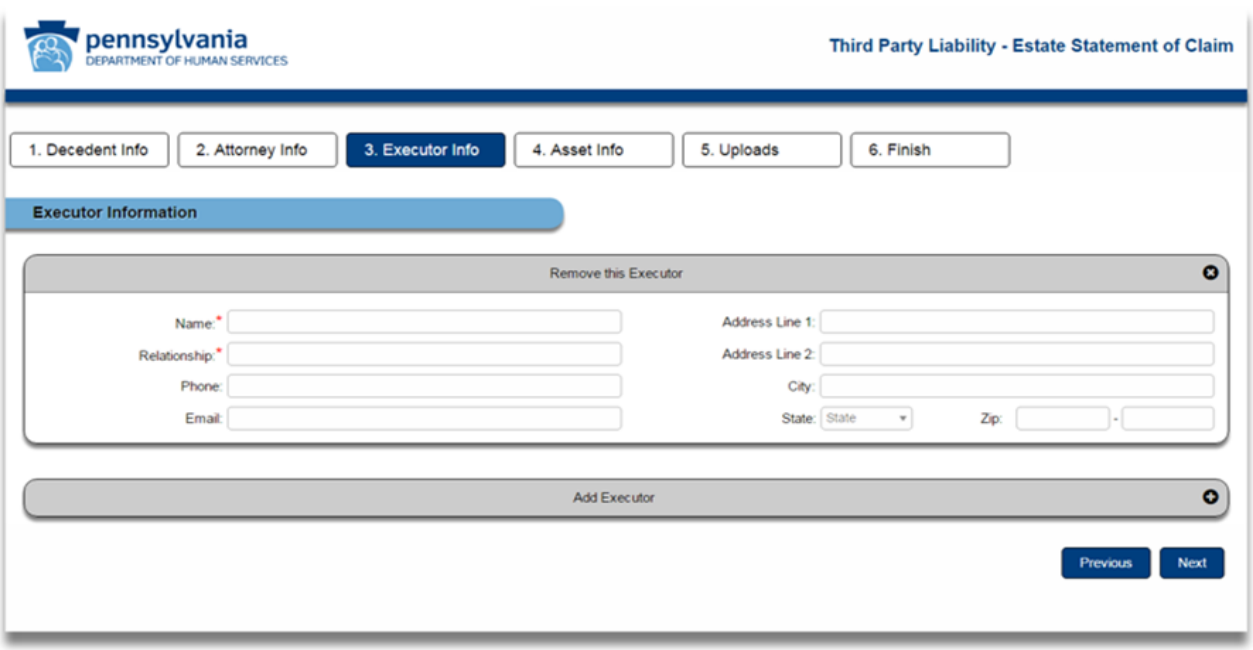


TPL Web Portal Dashboard Appendix B – Estate

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

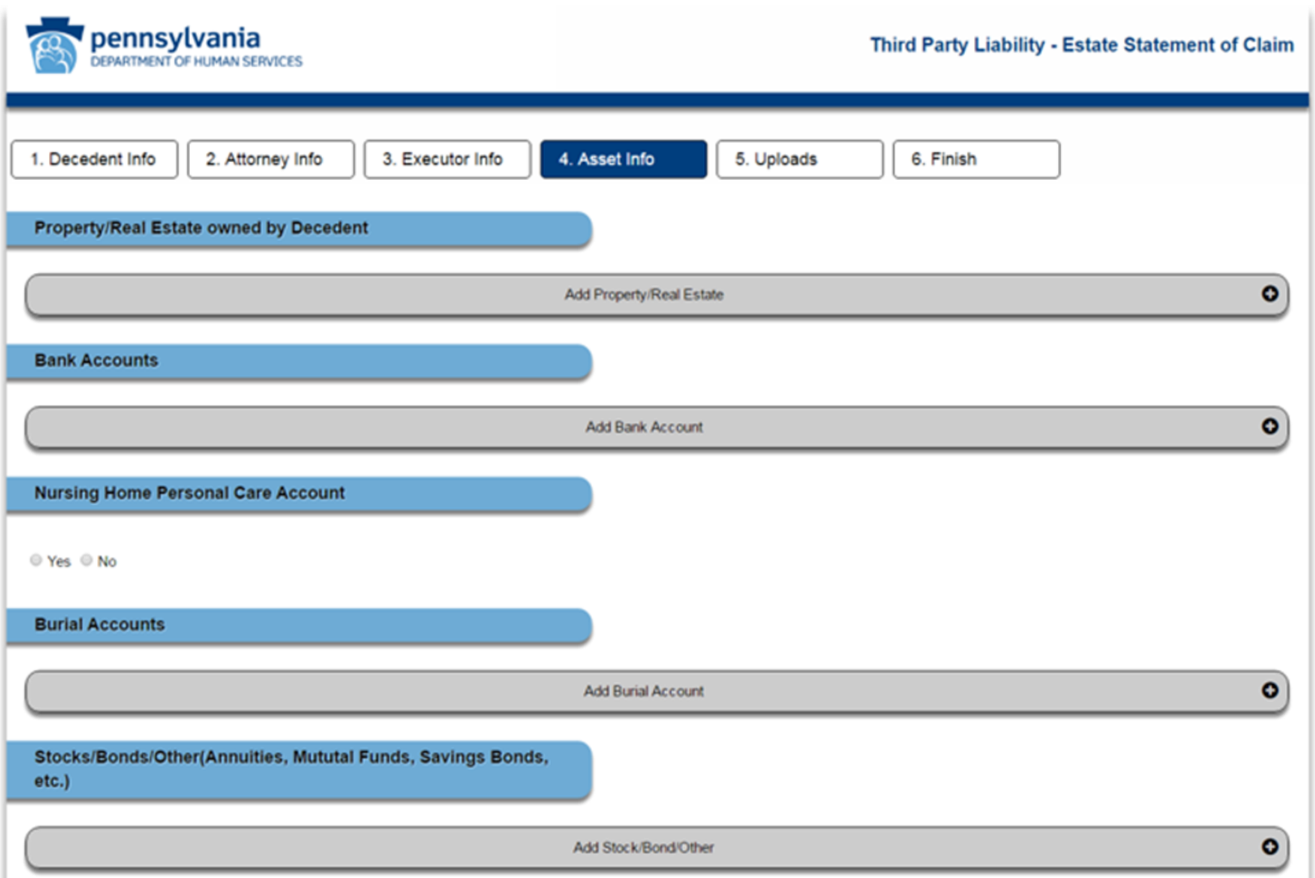


You will now be asked to provide information about the executor of the estate of the estate being reported. You can add up to 5 executors.



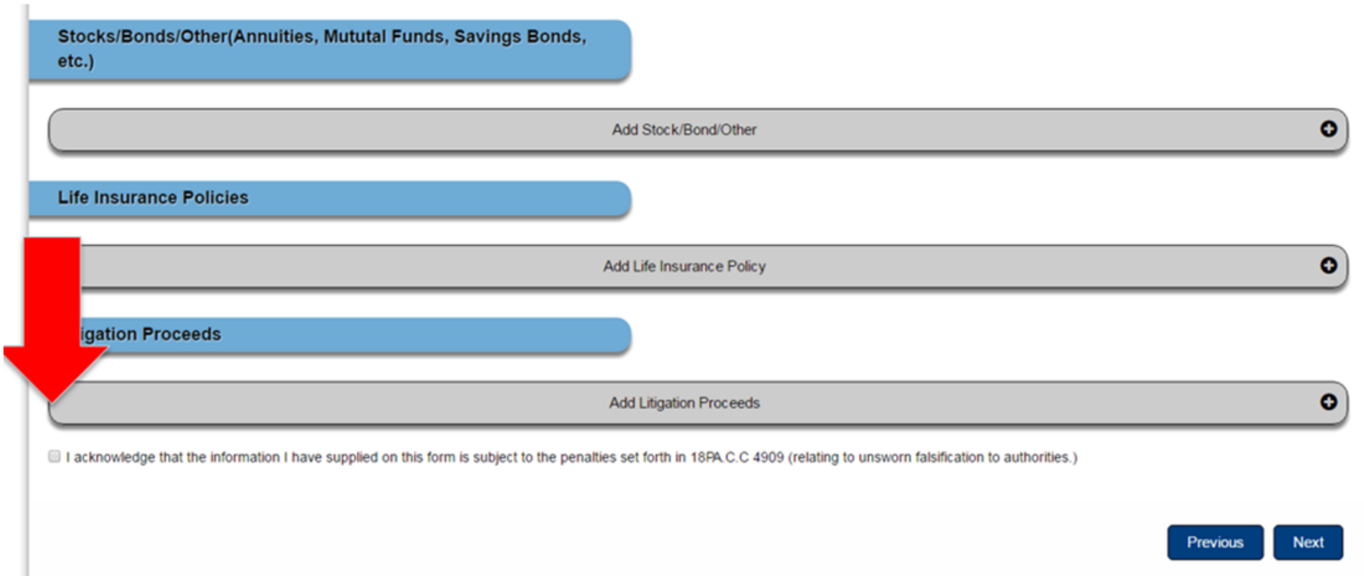
TPL Web Portal Dashboard Appendix B – Estate

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.

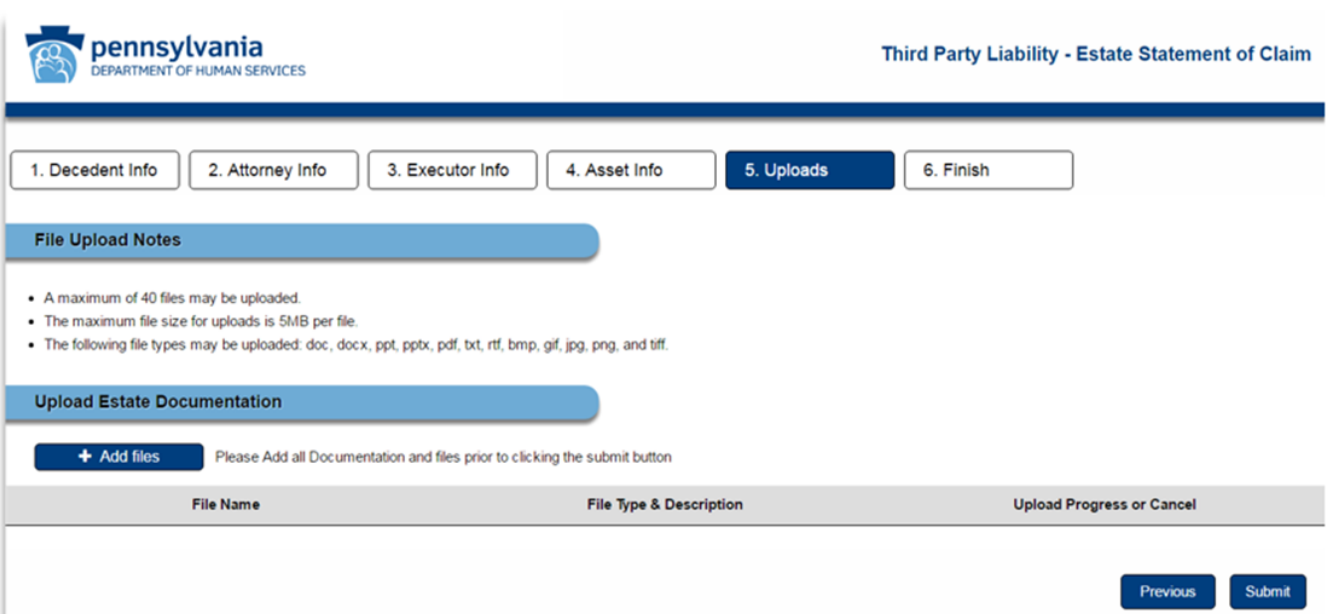


TPL Web Portal Dashboard Appendix B – Estate

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

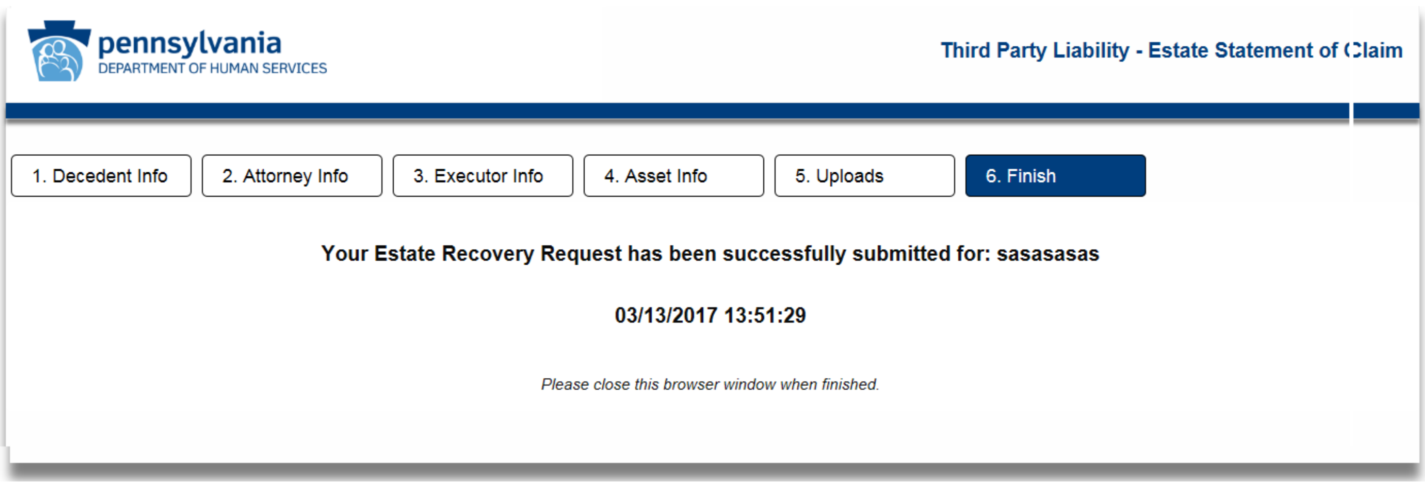


Below is the final submission screen. On this screen you will be given the opportunity to provide applicable documentation. Like the previous screens, the more pertinent documentation you provide, the faster your request can be processed.



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.

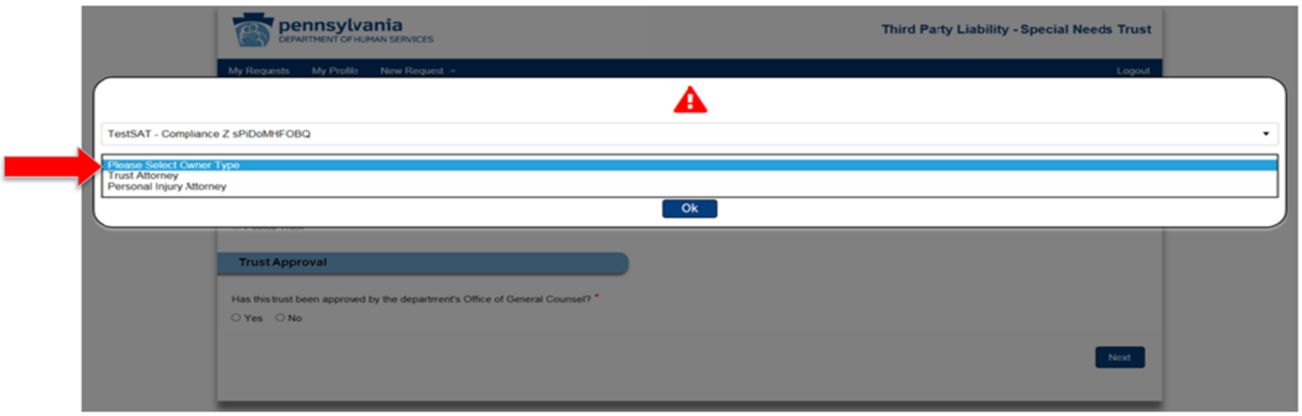


TPL Web Portal Dashboard Appendix C – Special Needs Trust

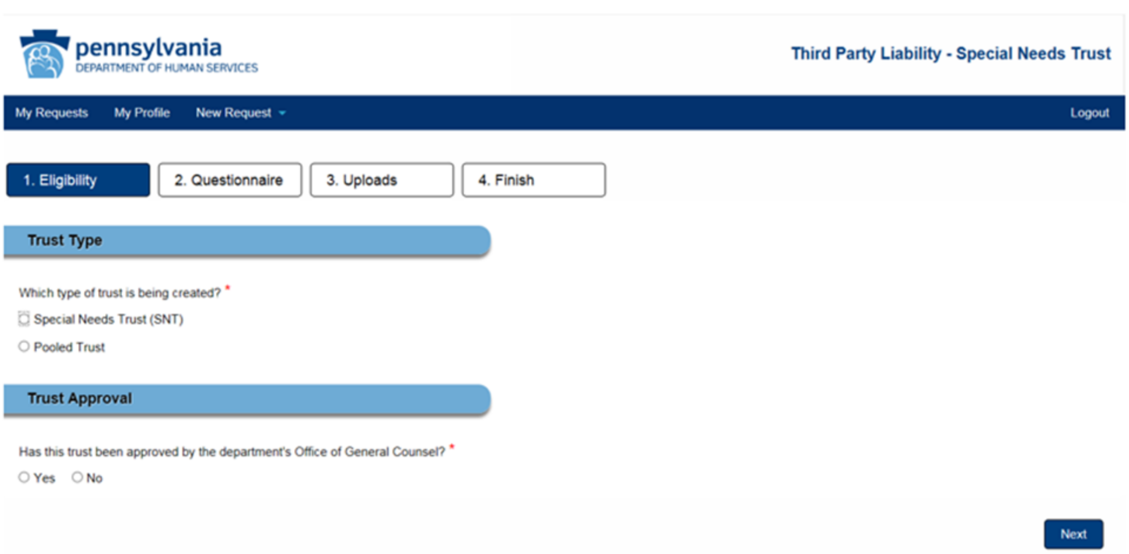
SNT submission:

- 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.

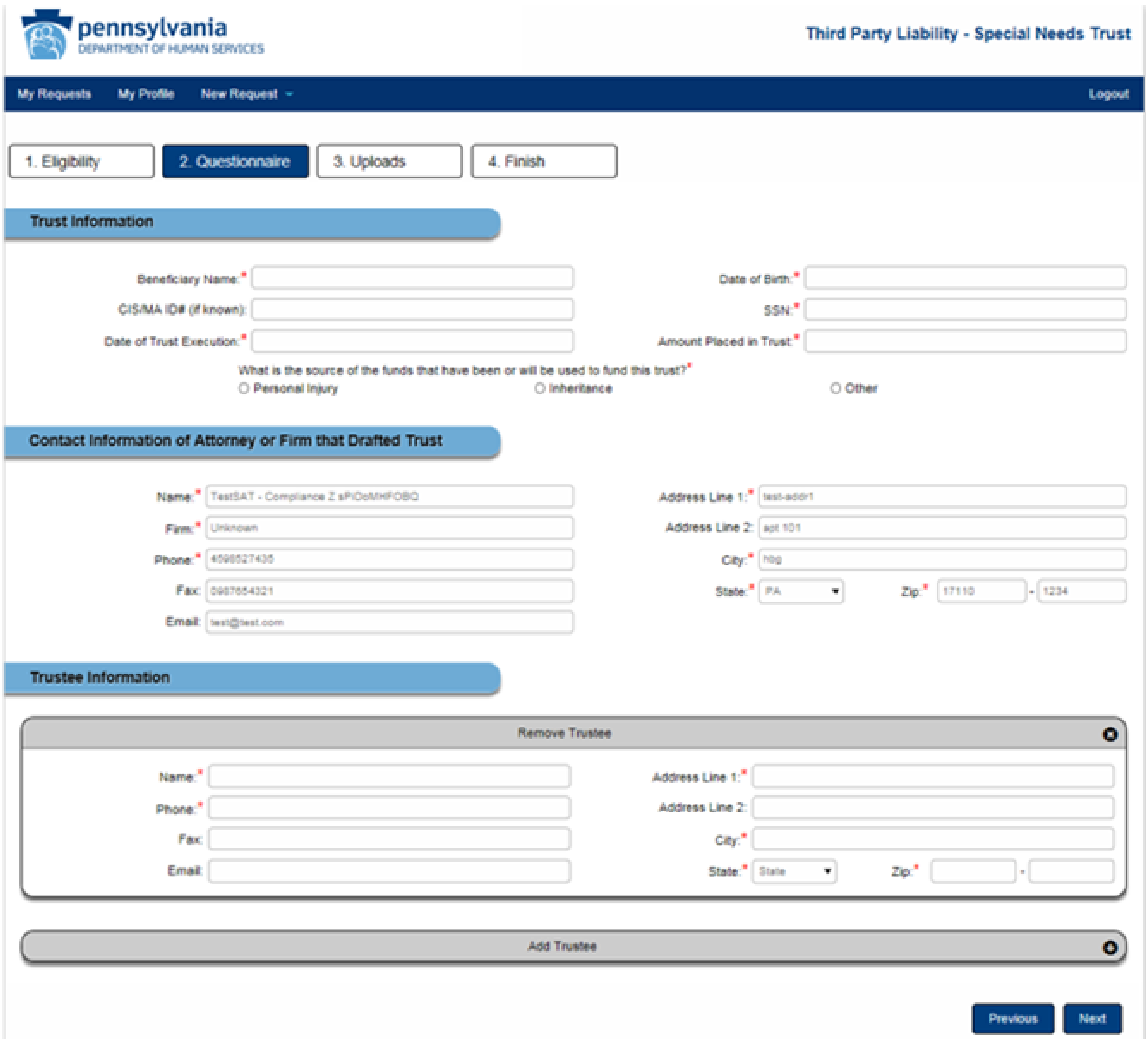


Next, select the type of trust and indicate whether the trust has been approved by the Department’s Office of General Counsel. Please note: Pooled trusts cannot be submitted via the TPL Web Portal. Please submit via fax, 717-772-6553 or mail to Third Party Liability, Special Needs Trust Depository, PO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



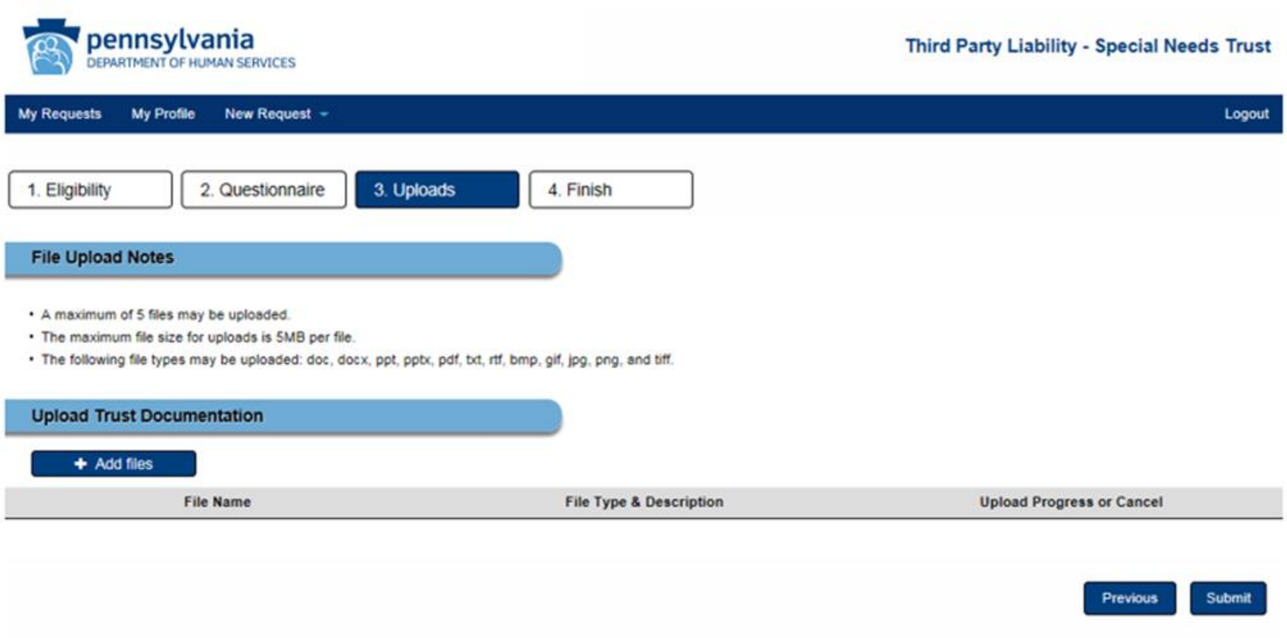
TPL Web Portal Dashboard Appendix C – Special Needs Trust

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.



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.



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.