

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

Now let's take a look at 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. Future web portal releases will enable you to receive updates and view the current status of your request.

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 interface with callouts 1, 2, and 3. Callout 1 points to the 'My Requests' link in the top navigation bar. Callout 2 points to the search filters (CIS#, Date of Incident, Client Name, Request Submitted) and the search text input field. Callout 3 points to the 'My Requests' table header.

| View | CIS# | Client Name | Date Of Incident | Request Type | Request Status | Request Submitted |
|------|-----------|--|------------------|---------------------|---------------------|---------------------|
| | | Itty | 11/10/2017 | Special Needs Trust | Request is Received | 01/06/2017 09:16:34 |
| | | sdfsf | 11/10/2017 | Estate | Request is Received | 01/06/2017 09:14:56 |
| | | ulu yhozu | 09/14/2017 | Casualty | Request is Received | 01/06/2017 09:12:27 |
| | 002604037 | PW-DEFGHJ kimrppgrstuwxyzAB W-LW-DEFGHJ kimrppgrstuwxyz | 12/09/2016 | Casualty | Request is Received | 12/21/2016 14:39:28 |
| | 560179265 | PV-DEFGHJ kimrppgrstuwxyzAB V-LV-DEFGHJ kimrppgrstuwxyz | 12/09/2016 | Casualty | Request is Received | 12/21/2016 14:37:54 |
| | 560179265 | FU-DEFGHJ kimrppgrstuwxyzAB U-LU-DEFGHJ kimrppgrstuwxyz | 12/07/2016 | Casualty | Request is Received | 12/21/2016 14:35:51 |
| | 002604037 | FT-DEFGHJ kimrppgrstuwxyzAB T LT-DEFGHJ kimrppgrstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:29:23 |
| | 780145621 | FS-DEFGHJ kimrppgrstuwxyzAB S-LS-DEFGHJ kimrppgrstuwxyz | 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.'

The screenshot shows the dashboard interface with callouts 4, 5, 6, and 7. Callout 4 points to the pagination controls at the bottom of the table. Callout 5 points to the 'My Profile' link in the top navigation bar. Callout 6 points to the 'New Request' link in the top navigation bar. Callout 7 points to the 'Logout' link in the top navigation bar.

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 'My Requests' table is displayed with 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.

| 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 kimr'opgrstuvewyzAB W LW-DEFGH j kimr'opgrstuvewyz | 12/08/2016 | Casualty | Request is Received | 12/21/2016 14:39:28 |
| <input checked="" type="checkbox"/> | 560179265 | PV-DEFGH j kimr'opgrstuvewyzAB V LV-DEFGH j kimr'opgrstuvewyz | 12/08/2016 | Casualty | Request is Received | 12/21/2016 14:37:54 |
| <input checked="" type="checkbox"/> | 560179265 | FU-DEFGH j kimr'opgrstuvewyzAB U LU-DEFGH j kimr'opgrstuvewyz | 12/07/2016 | Casualty | Request is Received | 12/21/2016 14:35:51 |
| <input checked="" type="checkbox"/> | 002604037 | FT-DEFGH j kimr'opgrstuvewyzAB T LT-DEFGH j kimr'opgrstuvewyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:29:23 |
| <input checked="" type="checkbox"/> | 790145621 | FS-DEFGH j kimr'opgrstuvewyzAB S LS-DEFGH j kimr'opgrstuvewyz | 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:

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Third Party Liability

My Requests My Profile New Request Logout

My Profile

2 First Name: TestSAT - Compliance
Middle Initial: Z
Last Name: sPIDOmHFOBQ
Phone: 4596527435
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-DEFOthj klmr'opprstuwxyzAB W LW-DEFOthj klmr'opprstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:39:28 |
| <input checked="" type="checkbox"/> | 560179265 | PU-DEFOthj klmr'opprstuwxyzAB Y LV-DEFOthj klmr'opprstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:37:54 |
| <input checked="" type="checkbox"/> | 560179265 | FU-DEFOthj klmr'opprstuwxyzAB U LU-DEFOthj klmr'opprstuwxyz | 12/07/2016 | Casualty | Request is Received | 12/21/2016 14:35:51 |
| <input checked="" type="checkbox"/> | 002604037 | FT-DEFOthj klmr'opprstuwxyzAB T LT-DEFOthj klmr'opprstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:29:23 |
| <input checked="" type="checkbox"/> | 790145621 | F8-DEFOthj klmr'opprstuwxyzAB S LS-DEFOthj klmr'opprstuwxyz | 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 'My Requests' section of the dashboard. It includes a search bar with options for CISA#, Date Of Incident, Client Name, and Request Submitted. Below the search bar is a table of requests. A blue circle with the number '1' highlights the first row of the table.

| View | CISA# | Client Name | Date Of Incident | Request Type | Request Status | Request Submitted |
|-------------------------------------|-----------|---|------------------|---------------------|---------------------|---------------------|
| <input checked="" type="checkbox"/> | | Itty | 11/19/2017 | Special Needs Trust | Request is Received | 01/06/2017 09:16:34 |
| <input checked="" type="checkbox"/> | | sdstar | 11/19/2017 | Estate | Request is Received | 01/06/2017 09:14:56 |
| <input checked="" type="checkbox"/> | | wlu yhuo | 09/14/2017 | Casualty | Request is Received | 01/06/2017 09:12:27 |
| <input checked="" type="checkbox"/> | 002604037 | FN-DEFON J kmmrppgrstuwxyzAB W LW-DEFON J kmmrppgrstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:39:28 |
| <input checked="" type="checkbox"/> | 560179265 | FV-DEFON J kmmrppgrstuwxyzAB V LV-DEFON J kmmrppgrstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:37:54 |
| <input checked="" type="checkbox"/> | 560179265 | FU-DEFON J kmmrppgrstuwxyzAB U LU-DEFON J kmmrppgrstuwxyz | 12/07/2016 | Casualty | Request is Received | 12/21/2016 14:35:51 |
| <input checked="" type="checkbox"/> | 002604037 | FT-DEFON J kmmrppgrstuwxyzAB T LT-DEFON J kmmrppgrstuwxyz | 12/06/2016 | Casualty | Request is Received | 12/21/2016 14:29:23 |
| <input checked="" type="checkbox"/> | 790149621 | FB-DEFON J kmmrppgrstuwxyzAB S LB-DEFON J kmmrppgrstuwxyz | 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 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 for a claim submitted by Jessica Jones on 12/09/2016. The 'Claim Administration' section includes fields for Current Owner (TestSAT - Compliance Z sPIDoH#FOBQ), Current Delegate (None), and Change Delegate (Select a Delegate to Add/Remove). The 'View Claim Information' section includes fields for Full Name (Itty), Date of Birth (01/10/2017), CISA/MA ID#, SSN (xxx-xx-2222), Request Type (Special Needs Trust), and Date Submitted (1/6/2017 9:16:34 AM). The 'File Upload Notes' section provides instructions on file uploads. The 'Upload Claim Documentation' section includes 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 placed over the 'Change Owner' button. Other fields include 'Current Delegate' (None), 'Change Delegate' (Select a Delegate to Add/Remove), and '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', 'TestSAT - Compliance Z sPIDoMhFOBQ', and 'TestSAT - Compliance Z sPIDoMhFOBQ'. A blue circle with the number '2' is over the dropdown. Below the dropdown is a 'Save Owner Change' button, which is highlighted with a blue circle containing the number '3'. 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 sPIDoMhFQBQ 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 |
|--------------------------------------|-------------------------|---------------------------|
| Upload Additional Files | | |

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

Claim Administration

Current Owner: TestSAT - Compliance Z sPIDoMhFQBQ 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 |
|--------------------------------------|-------------------------|---------------------------|
| Upload Additional Files | | |

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 screenshot shows the 'Casualty Information' form in the TPL Web Portal. The form is divided into several sections:

- Casualty Information:** Includes fields for Last Name, First Name, MI, CIS/MA ID#, SSN, Date of Birth, and Date of Incident. Red asterisks indicate required fields.
- Incident Type:** A dropdown menu for 'Type of Incident' with a red arrow pointing to it.
- Injury Information:** Includes a note: 'Be sure to select all injuries that apply to this incident (injuries must be selected one at a time)'. Below this is a table with 'Injury Location' and 'Description of Injury' columns. A red arrow points to the 'Injury Location' dropdown.
- Injury Selection List:** A table with columns for 'Injury Location' and 'Description of Injury'.
- Has Client finished treating?:** Radio buttons for 'Yes' and 'No'.
- Next:** A blue button at the bottom right.

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 in the TPL Web Portal. The form is divided into two main sections:

- Plaintiff Attorney Information:** Includes fields for Name, Firm, Phone, Fax, Email, Address Line 1, Address Line 2, City, State, Zip, and Docket/Case #. Red asterisks indicate required fields.
- Defendant Attorney Information:** A section with a dropdown menu for 'Add Defendant Attorney'.
- Disclaimer:** A checkbox and text: 'Disclaimer: By Clicking this "Submit Information" button, you are entering a case into the Third Party Liability (TPLs) system.'
- Previous/Next:** Blue buttons at the bottom right.

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 |
|-----------|-------------------------|---------------------------|
|-----------|-------------------------|---------------------------|

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 menu)
- Zip: -
- Attorney File #:

At the bottom right, there are "Previous" and "Next" buttons.

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 menu)
- Zip: -

At the bottom right, there are "Previous" and "Next" buttons. Additionally, there is a "Remove this Executor" button with a close icon (X) and an "Add Executor" button with a plus icon (+).

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.

The screenshot shows the 'Third Party Liability - Estate Statement of Claim' form, specifically the '4. Asset Info' step. The form is part of a six-step process: 1. Decedent Info, 2. Attorney Info, 3. Executor Info, 4. Asset Info (highlighted), 5. Uploads, and 6. Finish. The '4. Asset Info' section includes several categories with 'Add' buttons:

- 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.

The screenshot shows a web form with three main sections, each with a blue header bar and a grey input field with a plus icon on the right:

- Stocks/Bonds/Other(Annuities, Mutual Funds, Savings Bonds, etc.)**: Input field labeled "Add Stock/Bond/Other".
- Life Insurance Policies**: Input field labeled "Add Life Insurance Policy".
- Litigation Proceeds**: Input field labeled "Add Litigation Proceeds". A red arrow points to this section.

Below the input fields is a checkbox with the text: "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.)".

At the bottom right are two buttons: "Previous" and "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.

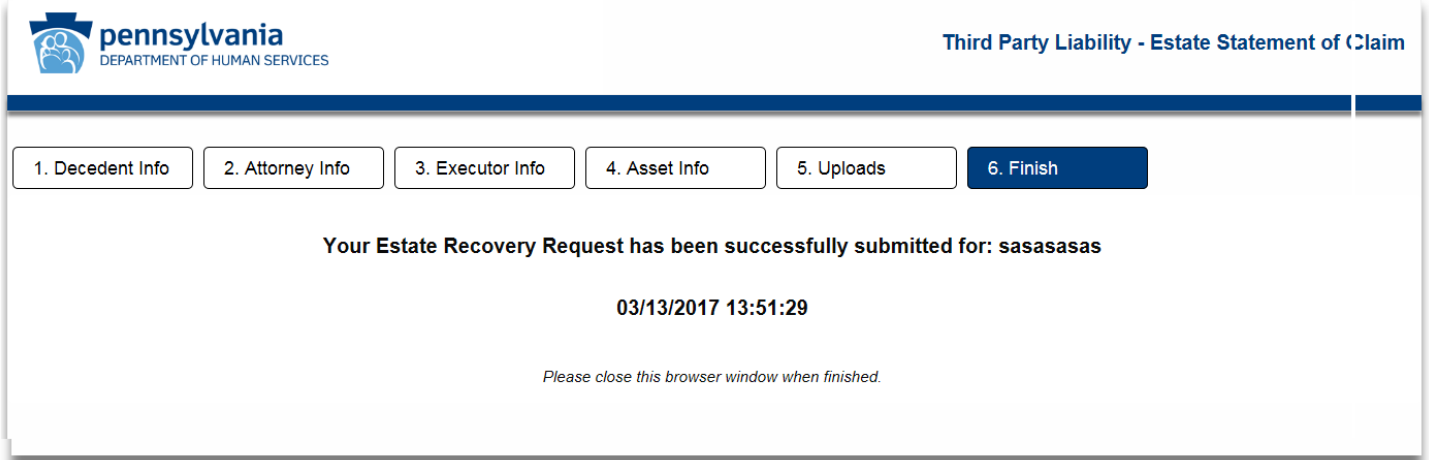
The screenshot shows the final submission screen with the following elements:

- Logo**: Pennsylvania Department of Human Services.
- Title**: Third Party Liability - Estate Statement of Claim.
- Progress Bar**: Six steps are shown: 1. Decedent Info, 2. Attorney Info, 3. Executor Info, 4. Asset Info, 5. Uploads (highlighted in blue), 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**: A blue button labeled "+ Add files" and the text "Please Add all Documentation and files prior to clicking the submit button".
- Table Header**:

| File Name | File Type & Description | Upload Progress or Cancel |
|-----------|-------------------------|---------------------------|
|-----------|-------------------------|---------------------------|
- Buttons**: "Previous" and "Submit" buttons at the bottom right.

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.



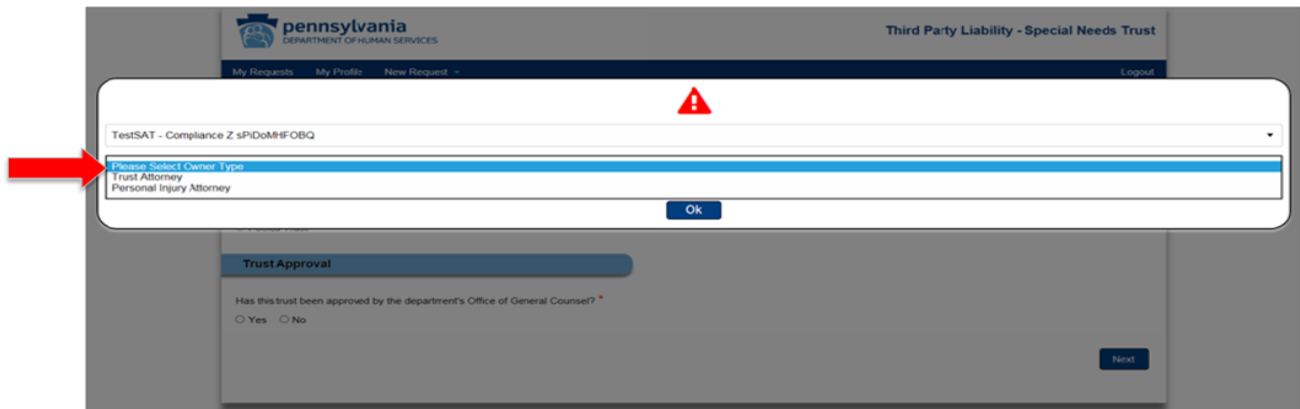
The screenshot displays the Pennsylvania Department of Human Services web portal interface. At the top left is the state logo and the text "pennsylvania DEPARTMENT OF HUMAN SERVICES". At the top right is the page title "Third Party Liability - Estate Statement of Claim". Below the header is a navigation 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. The main content area shows a confirmation message: "Your Estate Recovery Request has been successfully submitted for: sasasasas" followed by 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:

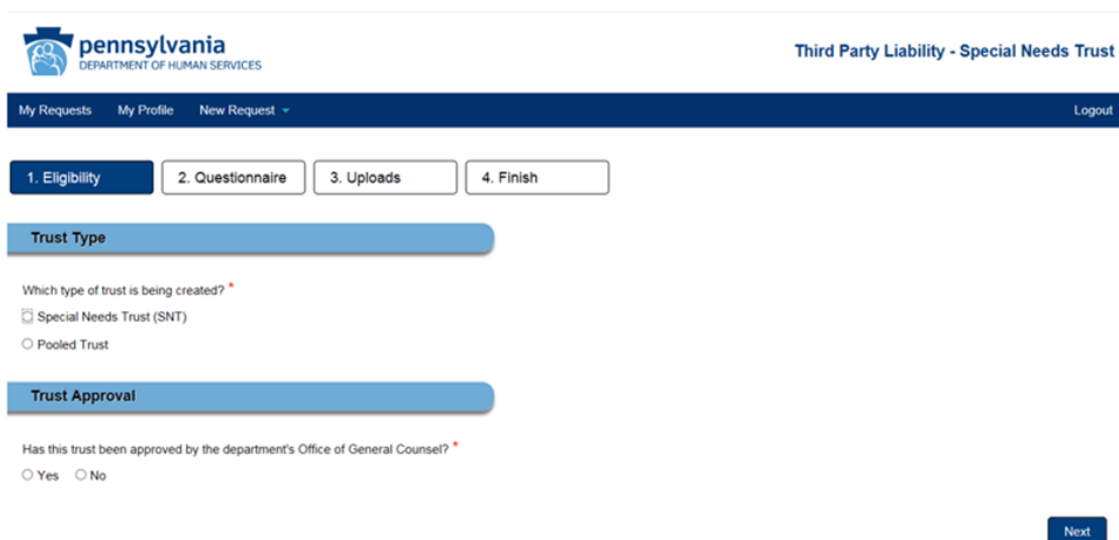
- Please note that all required fields have a red indicator next to them.
- Even if the field is not required, please fill all forms to the best of your knowledge.

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 text "Please Select Owner Type" and two options: "Trust Attorney" and "Personal Injury Attorney". A red arrow points to the dropdown menu. Below the dropdown menu is an "Ok" button. 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 a question: "Which type of trust is being created?" with two radio button options: "Special Needs Trust (SNT)" and "Pooled Trust". Below this is the "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". 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.

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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 indicator shows four steps: '1. Eligibility', '2. Questionnaire', '3. Uploads' (highlighted in blue), and '4. Finish'. Below the progress indicator is a section titled 'File Upload Notes' with a blue header bar. 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 another section titled 'Upload Trust Documentation' with a blue header bar and a '+ Add files' button. At the bottom of this section is a table with three columns: 'File Name', 'File Type & Description', and 'Upload Progress or Cancel'. At the bottom right of the page 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 indicator shows four steps: '1. Eligibility', '2. Questionnaire', '3. Uploads', and '4. Finish' (highlighted in blue). Below the progress indicator is a large text area with the message: 'Your Special Needs Trust Claim Request has been successfully submitted for: Steve' followed by the timestamp '01/19/2017 15:01:45'.