

MetLink User Guide - Disability Claims (UDS)



Navigating Life Together
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[All States and All Territories]

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Overview

MetLink is a secure portal available on web and mobile platforms (Tablet) that offers a host of benefits administration capabilities supporting the many products and services available through MetLife.

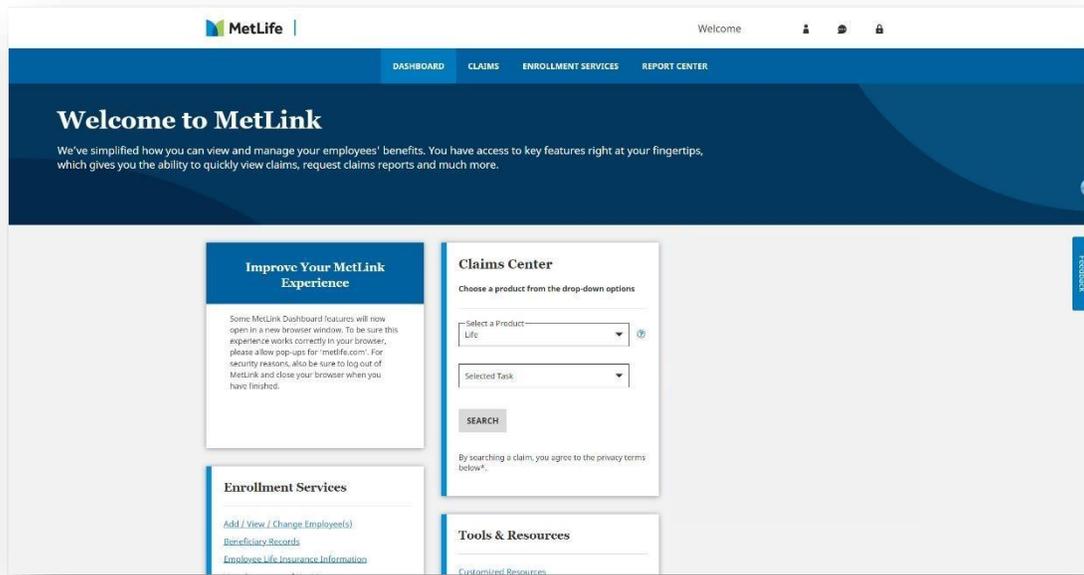
The MetLink Disability Claims experience offers access to disability claim information and details, and the ability to submit a disability claim. This feature provides easy access to information needed to support participants and business administrative functions. Users may be entitled to inquiry only or inquiry and intake functionality.

Disability User Guide

This guide will help users navigate the capabilities and features available for Disability Claims online. The features to be covered in this guide include:

- ▶ MetLink Dashboard
- ▶ Claims Center
- ▶ Claim Searches
- ▶ Claim Information and Details
- ▶ Payment Summary (if applicable)
- ▶ Claim Update Capabilities
- ▶ Downloading Claim Details
- ▶ Filing a Claim

Dashboard



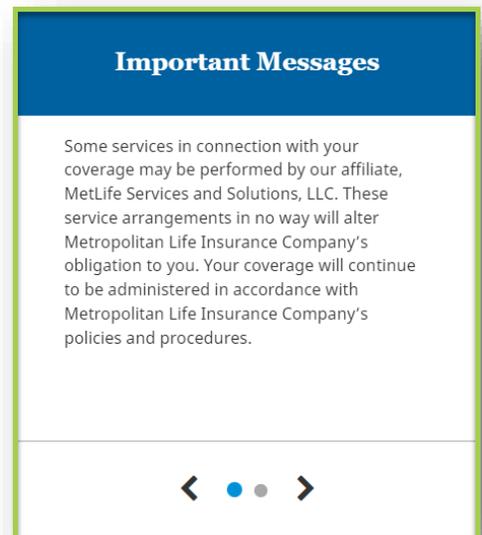
When logging in, the user will land on the **Dashboard** page. The Dashboard tab (located on the navigation bar) is highlighted to let the user know where they are within MetLink.

There are many functions and features available from the Dashboard page that include **Important Messages** and **Claim Center** information

Important Messages

The Important Messages feature provides users with access to site-level information such as upcoming maintenance activity, etc.

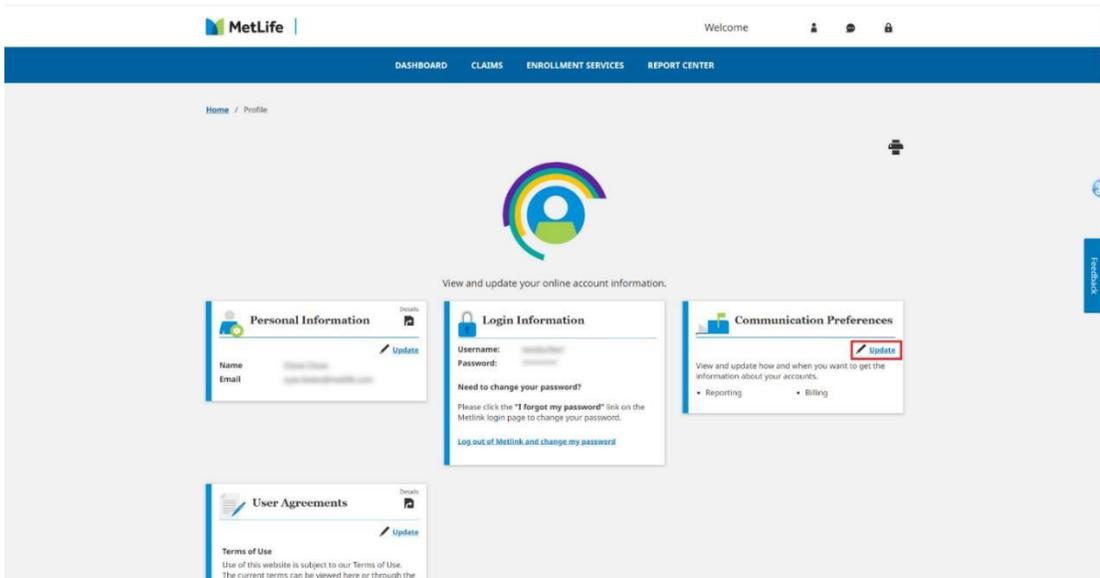
Directional arrows are available at the bottom of the card to navigate to next or previous message(s) if multiple messages are posted.



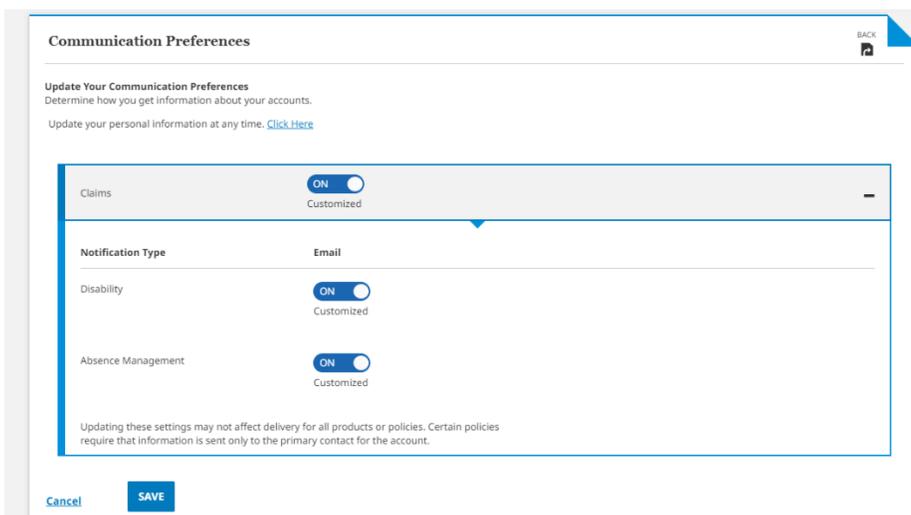
Manage Email Subscription Information

Your eMail Subscription Information can be managed from the Profile section of MetLink. Click on the Profile icon at the top of the page to access.

To manage your email subscriptions, click on the 'Update' hyperlink button in the "Communication Preferences" section.



You are able to select or deselect the notification type you would like to receive email updates for by clicking the ON / OFF button next to each notification type. Once you have made your selections, ensure your email address is correct, then click on the 'SAVE' button to save your changes.



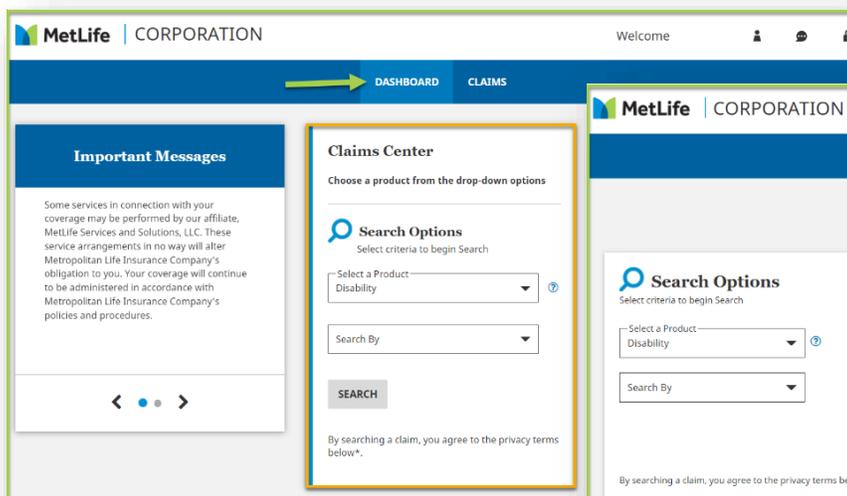
Claims Center

The Claims Center feature enables users to search for claims by selecting a Product and Search By option. A drop-down menu is provided so the user can select Disability from a selection of MetLife Products (the list will populate based on the products you have access to).

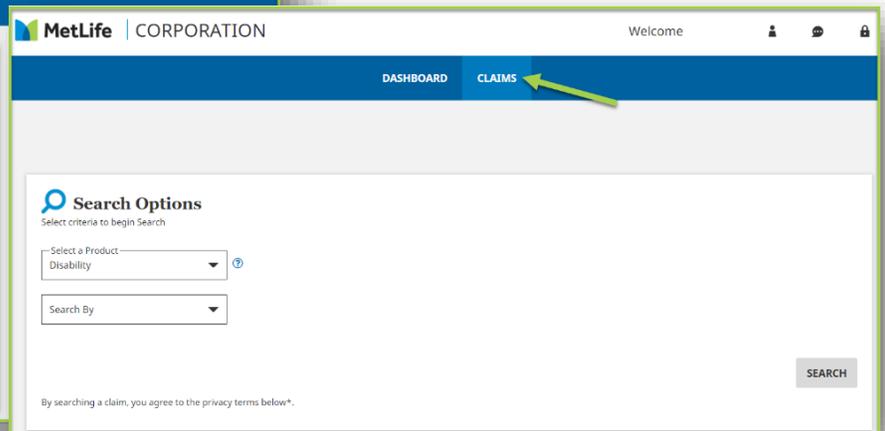
There are two ways a user can make their initial search for claims. Users can search via the Claims Center card from the Dashboard or the Claims Tab found on the navigation bar at the top of the screen. This brings the user to the Claims Search Options page. The results are the same.

The available product search features are based on the products or services the employer has with MetLife and/or the product features individuals have been granted access to view. Access to claims may also be limited based on individual security profiles.

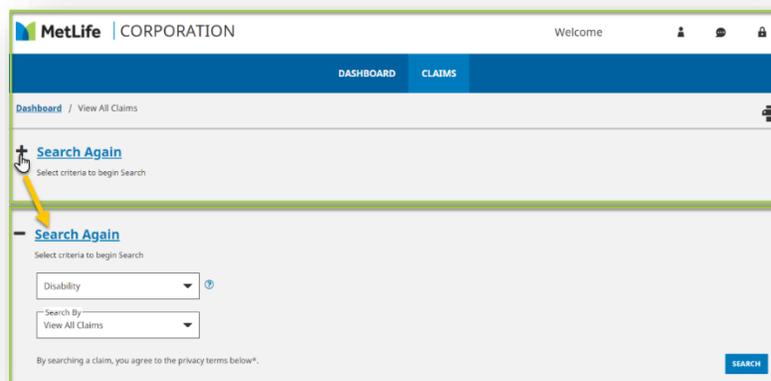
Claims Search From The Dashboard (Claims Center)



Claims Search From The Claims Tab



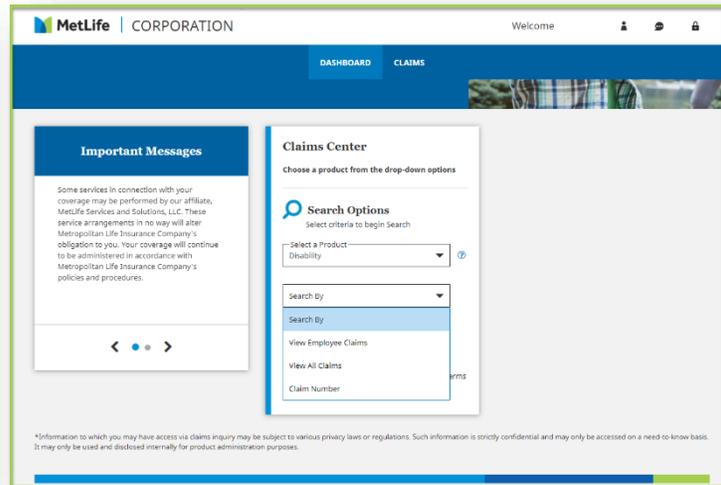
After the initial search is performed, the user can perform additional searches in quick succession by using the **'Search Again'** functionality built into the Claims experience. Simply expand (+) the search parameters and enter the new criteria. To minimize, click the (-) icon



Claim Search

There are multiple criteria ('Search By') options to select from when conducting a claims search. They include:

1. View Employee Claims
2. View All Claims
3. Claim Number

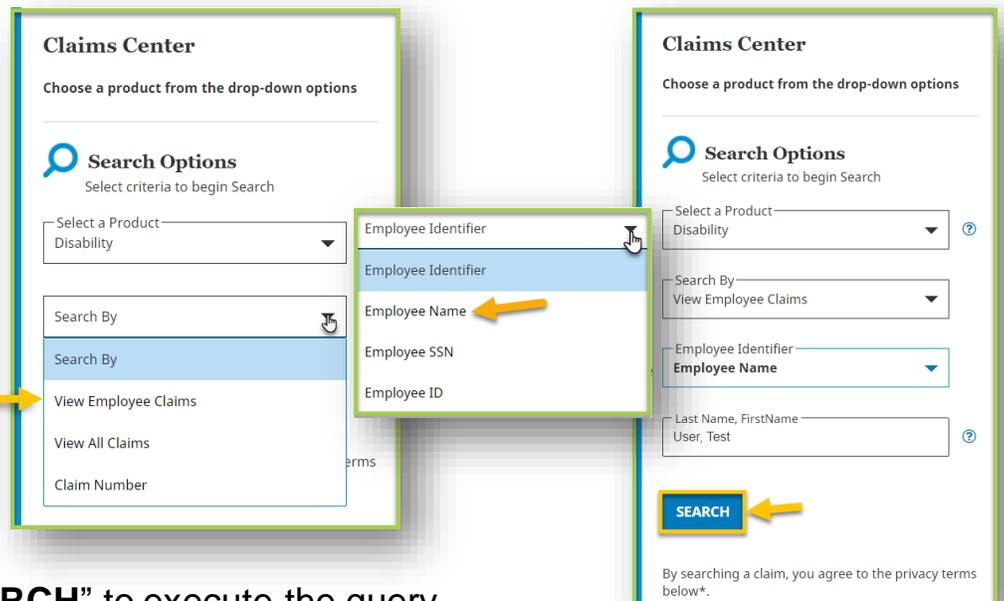


Search By Employee Identifiers (SSN, Employee ID, Employee Last Name)

To search for a claim by employee identifiers, follow these steps:

1. First, the user must select a Product. Select the dropdown arrow to view the choices available for selection. When only one choice is available (Disability), the selection will default to that product.
2. To search for specific employees and their claims, select the '**Search By**' dropdown, then '**View Employee Claims**'. The user will be prompted to further refine their search using one of the following Employee Identifiers

- ▶ Employee Name
- ▶ Employee SSN
- ▶ Employee ID



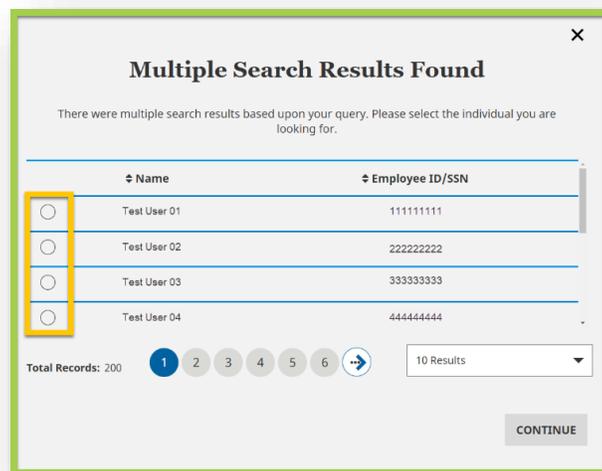
3. Be sure to click "**SEARCH**" to execute the query.

Note the following:

- ▶ If the user needs additional explanation of what is required for each search option, click on the blue question mark displayed next to each option.
- ▶ The message 'Please make a selection' will display when an election is not made for one more of the required search results.

Searching with the EEID or SSN will bring the user directly to the Employee Claim Search Results Page. However, searching via the employee's name may return multiple results if there are multiple employees with that name

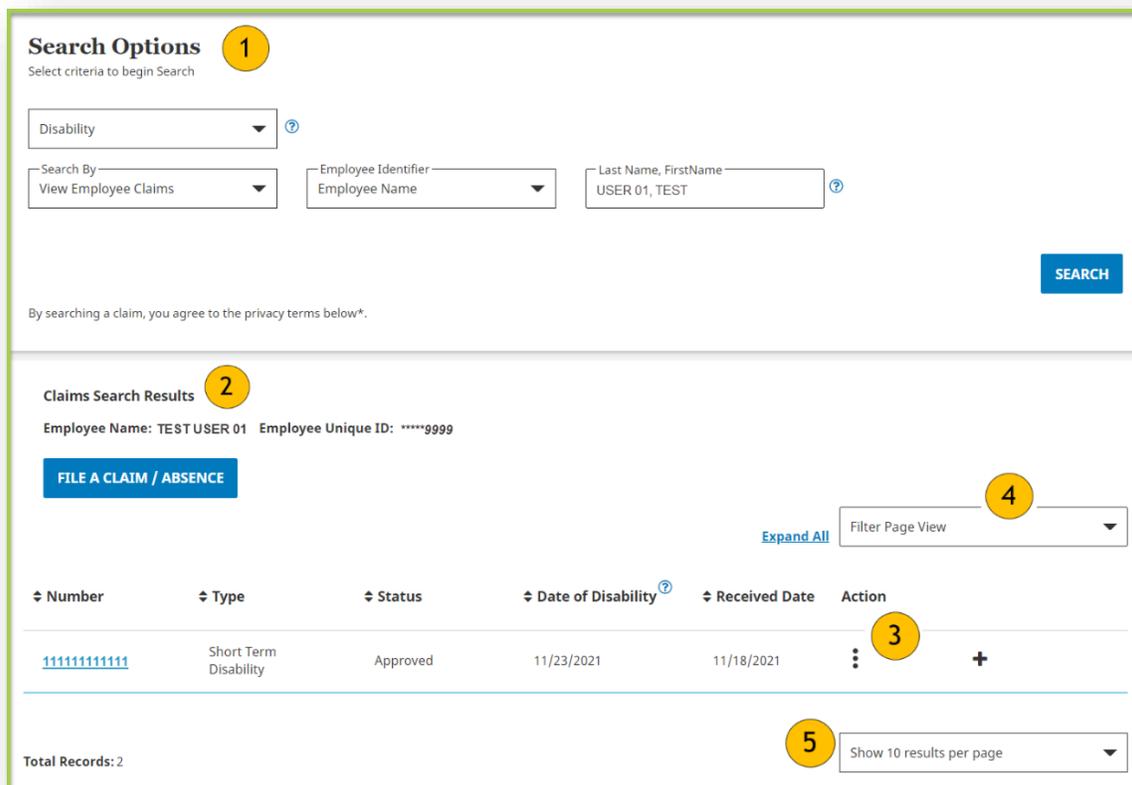
Select the 'CONTINUE' button to view results of the search.



After selecting the 'CONTINUE' button, the Claim Search Results page will display.

Claim Search Results

The Claim Search Results page includes:

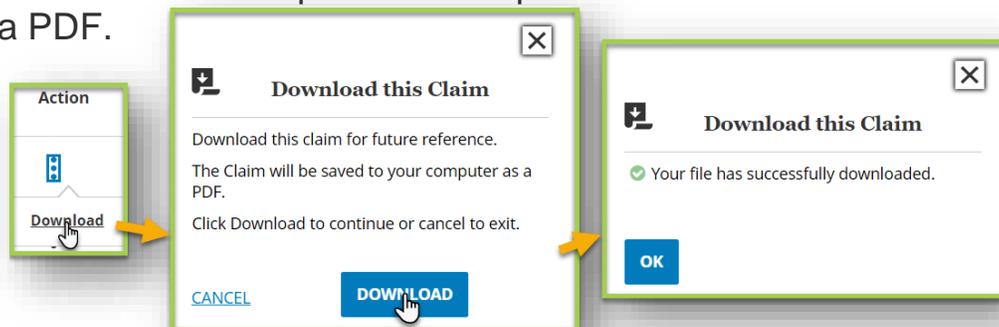


1 **Search Options:** As above, this is where the user selects criteria to search for claims. Upon retrieving search results, this can serve as a reminder as to what search parameters were entered. Alternatively, a user can enter new parameters to run a new search. Again, the critical search criteria include Product (e.g., Disability) and Employee Identifier. The user still can choose from Employee Last Name, Employee SSN and Employee ID

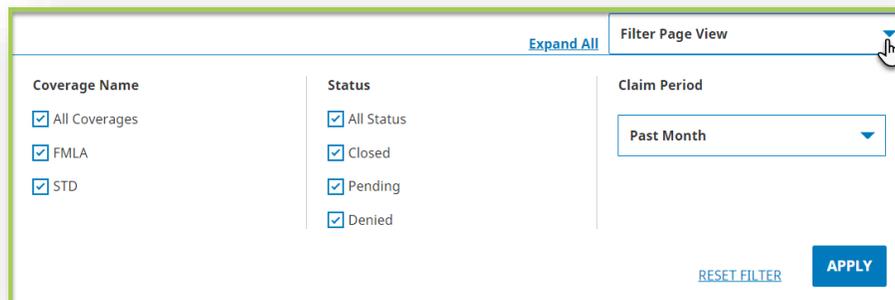
2 **Claims Search Results:** This section of the webpage includes the employee's name and masked unique identifier as well as a list of claims resulting from the search criteria summarizing the following claim information (from left to right)

- ▶ Number (Employee ID/Masked SSN)
- ▶ Type
- ▶ Status
- ▶ Date of Disability
- ▶ Receive Date

3 The  in the 'Action' column provides an option to download all available claim details in a PDF.



4 To view or change the filter criteria that was applied to the claim's data for each column such as the Claim Status or Claim Type, select the Filter Page View drop-down on the top right of the Claims Search Results screen.

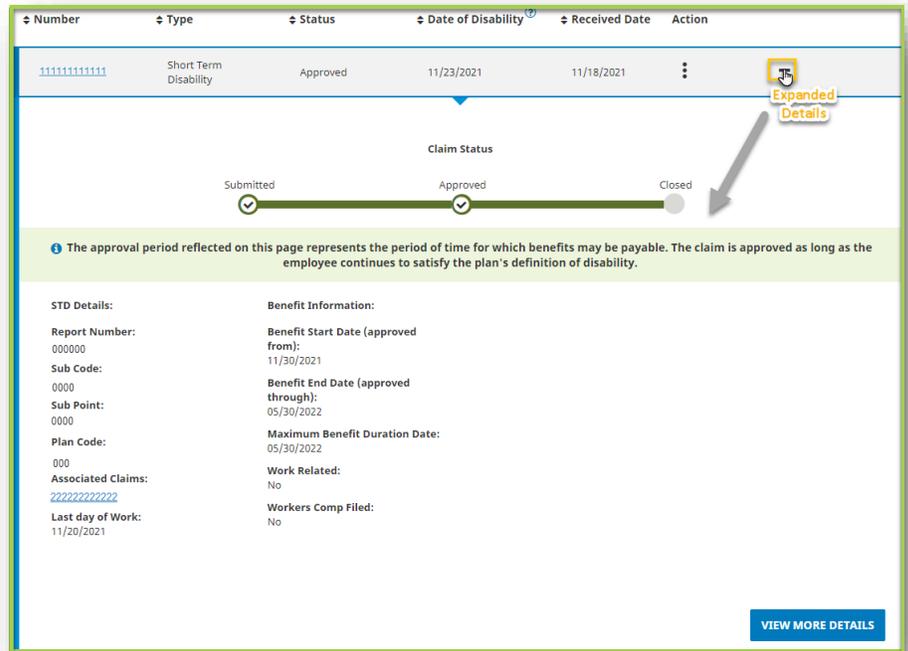


5 A user may change the number of results displayed on the screen.

The “+” to the right of each claim will expand the claim view and display additional claim detail information, such as:

- ▶ Structure
- ▶ Benefit Details – (start and stop dates)
- ▶ Associated Claims
- ▶ Appeals Card (if applicable)

The fields shown will change based on the type of claim.



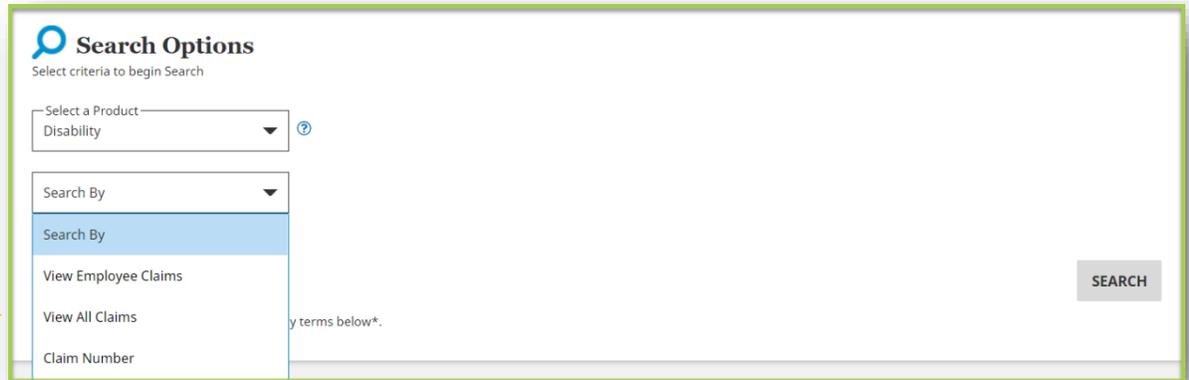
By selecting the claim number or clicking the ‘**View More Details**’ button in the expanded view, the user will be brought to a summary of details for the claim. This includes claim activity, employee and employment information, and other details relating to the claim. To return to the employee’s list of claims, click the ‘**Claim Search**’ breadcrumb in the top left-hand corner under the blue navigation bar

If the user needs additional explanation of what is required for each search option, select the blue question mark displayed next to each option. The message ‘**Please make a selection**’ will display when an election is not made for one or more of the required search results. Select the ‘**Search**’ button to view results of the search.

Search By View All Claims

To search for all available claims, follow these steps:

1. First, the user must select a product. Select the drop-down arrow to view the product choices available. When only one choice is available, the selection will default to that product.
2. Select the **'Search By'** drop-down, then select **'View All Claims'** and then select the **'SEARCH'** button



Search Options
Select criteria to begin Search

Select a Product
Disability

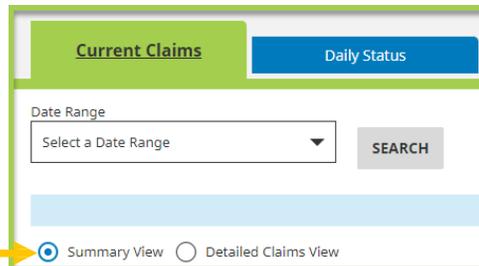
Search By

- Search By
- View Employee Claims
- View All Claims
- Claim Number

SEARCH

3. The **'Current Claims'** summary view will then display. The Current Claims tab offers two viewing options:

- ▶ Summary View
- ▶ Detailed Claims View



Current Claims Daily Status

Date Range
Select a Date Range

SEARCH

Summary View Detailed Claims View

The Summary View, which is the default option on the Current Claims tab, provides a summary of claims by coverage type. Each available program/coverage has a card which displays applicable claims according to status.

View All Claims - Current Claims Tab - Summary View

When selecting 'View All Claims', a summarized view of all claims viewable by the user will display by:

- ▶ Coverage Type
- ▶ Claim Status (Within each Coverage Type)

The number of claims within each claim status, can be viewed for each card type – approved, closed, denied, cancelled, closed, pending, etc...

Click the  icon above the coverage type cards to download the summary in an excel spreadsheet.

	A	B
1		
2	Current Activities - Summary View	
3		
4		
5		
6	STD	
7	Pending	68
8	Decision pending review	1
9	Approved	22
10	Suspended	50
11	Closed	110
12	Denied	18
13	Total	255

To see a list of all claims within a card/coverage type, select the arrow '>' to the right of the card header. All claims will be viewable based on the user's security access.

For Example: Selecting the STD arrow '>' will take the user to a detailed list of all STD claims.



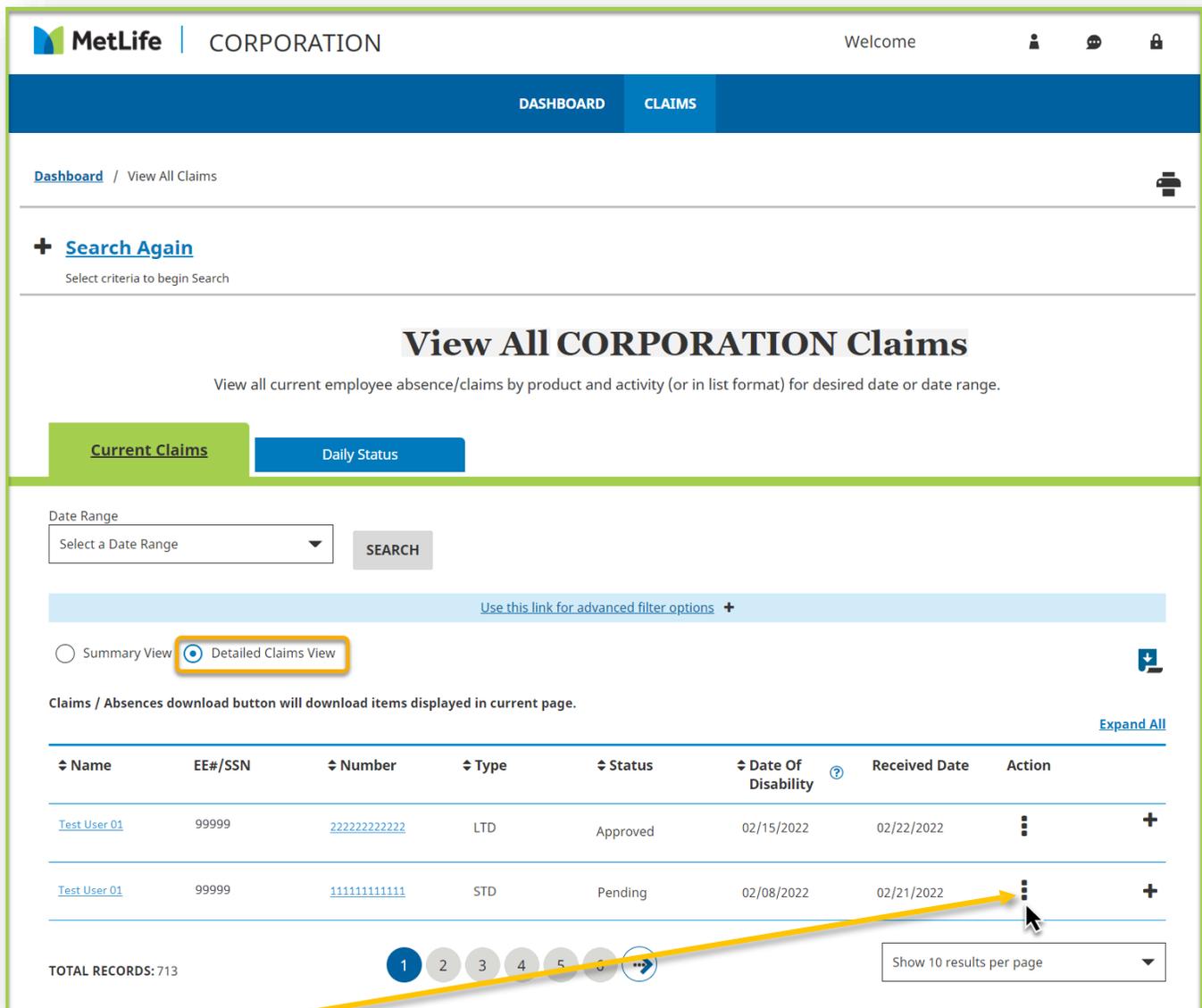
Selecting the STD '**Approved**' link will take the user to a summary of all STD approved claims. Note that statuses with available claims display with blue text and are clickable. Statuses with no claims available are in black text and are not clickable.

STD	
Pending	67
Decision pending review	5
Approved	20
Suspended	48
Closed	109
Denied	19
Total	268

View All Claims - Current Claims Tab - Detailed Claims View

The 'Detailed Claims View' provides more detailed information on all available disability claims and displays in order of Received Date, beginning with the most recent claim. The list can be sorted by the columns with a  icon next to the heading.

The information displayed for each claim includes Name, EE#/SSN, Claim Number, Claim Type, Status, Date of Disability, and Received Date.

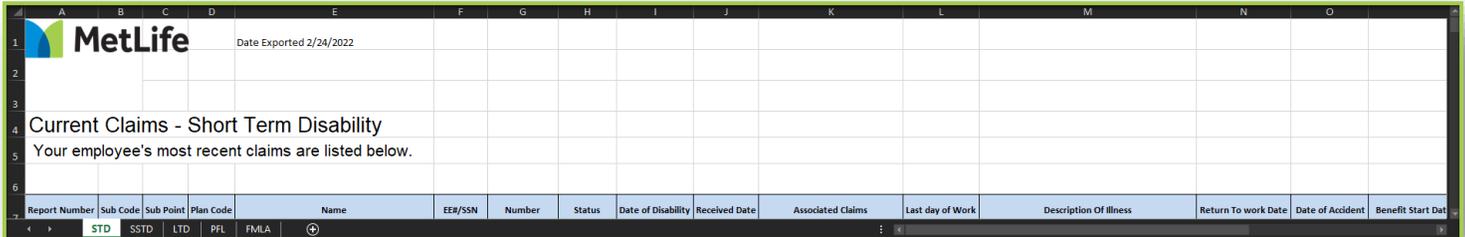


Name	EE#/SSN	Number	Type	Status	Date Of Disability	Received Date	Action
Test User 01	99999	222222222222	LTD	Approved	02/15/2022	02/22/2022	 
Test User 01	99999	111111111111	STD	Pending	02/08/2022	02/21/2022	 

By selecting the  under the 'Action' column, a user can download the details of a single claim in a PDF.

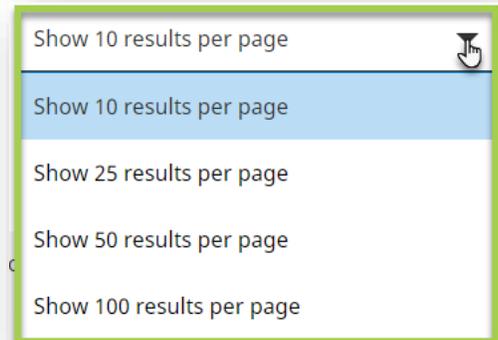
View All Claims - Current Claims Tab – Detailed Claims View *(continued)*

Additionally, a user can select the  icon at the top of the claims list to download the list of all claims currently displayed on the screen in an Excel file. Each coverage will be listed on separate tabs of the export and will consist of the information found in each column, as well as other claim specific details.



Report Number	Sub Code	Sub Point	Plan Code	Name	EE/SSN	Number	Status	Date of Disability	Received Date	Associated Claims	Last day of Work	Description Of Illness	Return To work Date	Date of Accident	Benefit Start Date
STD	SSTD	LTD	PFL	FMLA											

The default number of claims (rows) that will display per page is ten. To change the number of claims that display per page, select the drop-down box below the list of claims and next to the results drop-down and select from the available options (10, 25, 50, or 100.)



Click '+' to [expand a specific claim](#) and view more details or 'Expand All' to expand *all* claims on the current page.

Click the employee's name to display the [Employee Claim Search Results](#) list.

Name	EE#/SSN	Number	Type	Status	Date Of Disability	Received Date	Action
Test User 01	99999	222222222222	LTD	Approved	02/15/2022	02/22/2022	⋮ +

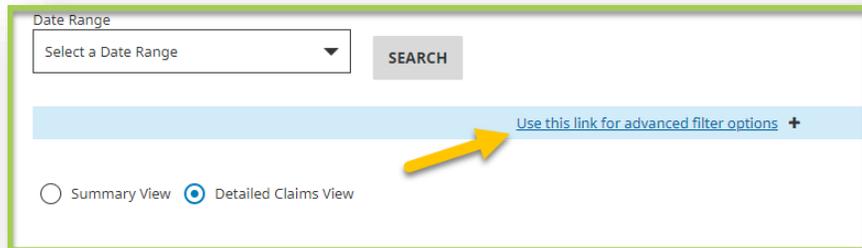
Click the Claim Number to be brought to the [Claim Details Page](#).

View All Claims – Current Claims Filters

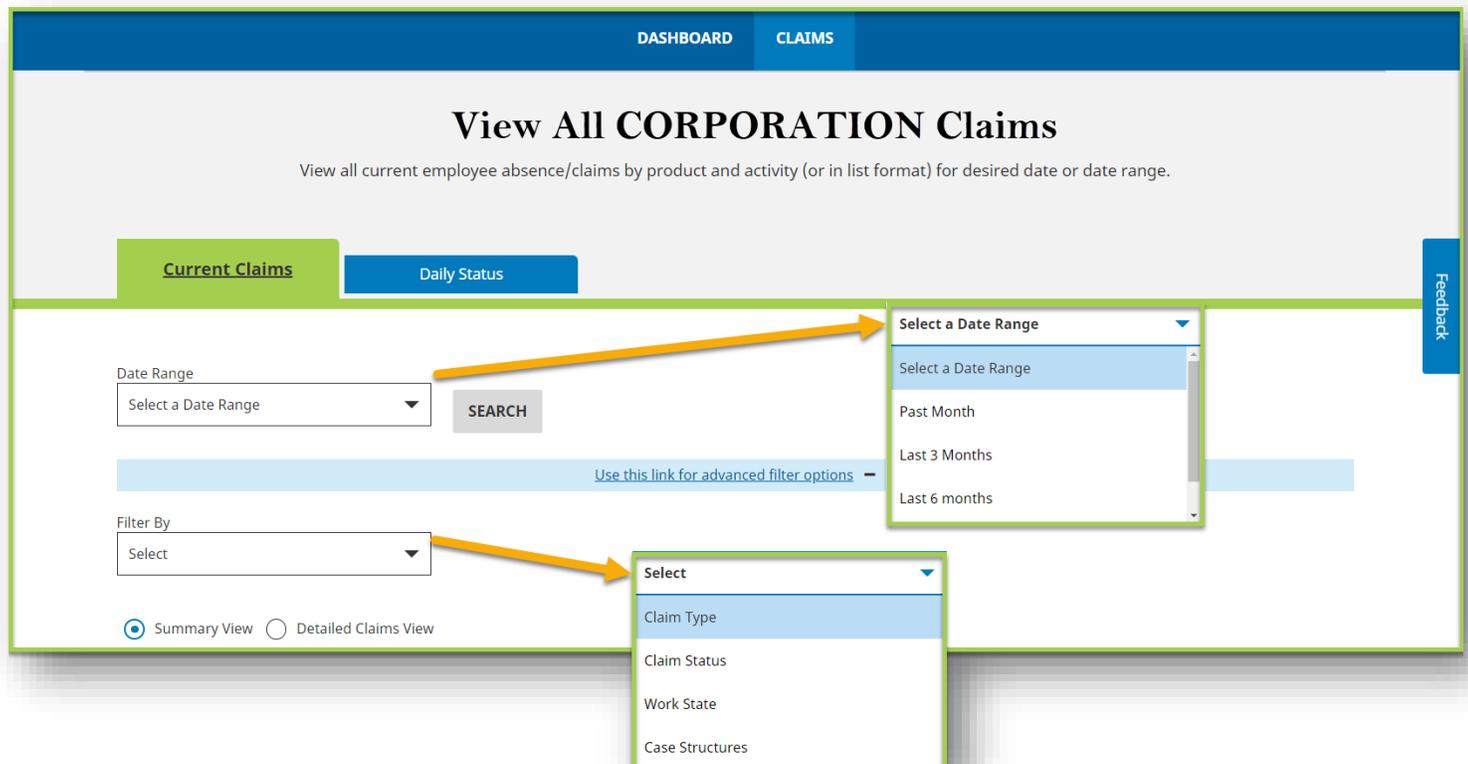
Users can customize their results by searching for claims within a date range and continue tailoring results with additional filters.

The Advanced Search Filters enable the user to further customize and refine the Claim Search results by selecting one of more filter criteria. Upon selecting the Advanced Search Filters link or the expand icon **+** to the right of the Advanced Search Filter link, the user is presented with the following filter options:

- ▶ The Claim Type
- ▶ Claim Status
- ▶ Case Structure
- ▶ Work State



The advanced filters can be combined to offer flexibility in how the data is searched and displayed. For example, if the user only wanted to see 'Approved' STD claims, from a specific work state and/or within a specific company structure, the Advanced Search Filter assists in controlling this lookup. **Note: Case Structure options will be limited to the structures available to each user's security profile.**



View All Claims - Filters (Continued)

- ▶ From the Advanced Filter Option menu, select a filter option from the dropdown. In the example to the right, **Claim Type** is selected, and the corresponding options are displayed for selection.
- ▶ Upon selecting of one or more filter criteria, they will be moved into a new list to the right, displaying only the search criteria selected from the available options to the left.

The screenshot shows the 'Current Claims' interface. At the top, there are two tabs: 'Current Claims' (active) and 'Daily Status'. Below the tabs, there is a 'Date Range' section with a dropdown menu labeled 'Select a Date Range' and a 'SEARCH' button. A blue banner below this contains the text 'Use this link for advanced filter options -'. Underneath is a 'Filter By' section with a dropdown menu currently set to 'Claim Type'. The main area is titled 'Your Search Options' and contains a tree view of filter options: 'All', 'Claim Type', 'STD', 'Statutory STD', 'LTD', and 'PFL'. The 'STD', 'LTD', and 'PFL' options are checked.

This screenshot shows the 'Current Claims' interface after filtering. The 'Date Range' and 'SEARCH' buttons are at the top. A blue banner contains the text 'Use this link for advanced filter options -'. Below that is the 'Filter By' dropdown, which is set to 'Claim Type'. The interface is split into two main sections: 'Your Search Options' on the left and 'Your Search Criteria' on the right. In 'Your Search Options', the tree view shows 'All', 'Claim Type', 'STD', 'Statutory STD', 'LTD', 'PFL', 'PML', and 'ADA'. The 'STD' and 'LTD' options are checked. A yellow arrow points from the 'STD' and 'LTD' options in the 'Your Search Options' list to the 'Your Search Criteria' list. In 'Your Search Criteria', the tree view shows 'All', 'Claim Type', 'STD', and 'LTD'. The 'STD' and 'LTD' options are checked. At the bottom right, there is a 'Clear Search' link and a 'SEARCH' button.

View All Claims - Filters (continued)

To further customize claim results, apply additional filters. Example:

- ▶ Claim Type = STD
- ▶ Claim Status = Approved
- ▶ Work State = Alabama
- ▶ Case Structure = 111111

The screenshot shows a filter configuration interface. At the top left, there is a 'Filter By' dropdown menu set to 'Work State'. Below this are two main panels: 'Your Search Options' and 'Your Search Criteria'. 'Your Search Options' is a tree view where 'Alabama' is selected under 'Work State'. 'Your Search Criteria' shows a list of filters: 'Claim Type' with 'STD' selected, 'Claim Statuses' with 'Approved' selected, 'Work State' with 'Alabama' selected, and 'Case Structure' with '+ 111111' selected. At the bottom right, there are 'Clear Search' and 'SEARCH' buttons.

Below is an example of final search results when the above filters are applied. To close filters, select the Advance Filter link or the collapse icon **-**.

The screenshot shows the search results summary view. At the top, there are radio buttons for 'Summary View' (selected) and 'Detailed Claims View'. A table displays the distribution of claim statuses:

Claim Status	Count
Pending	0
Decision pending review	0
Approved	26
Suspended	0
Closed	0
Denied	0
Total	26

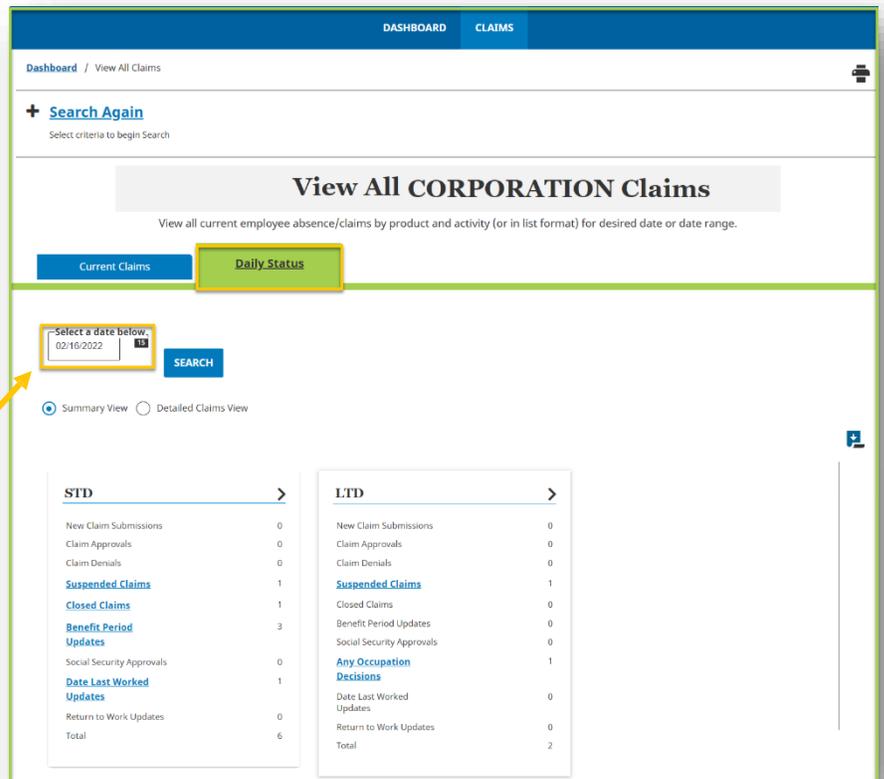
At the bottom left, it says 'TOTAL RECORDS: 1'. At the bottom right, there is a dropdown menu set to 'Show 10 results per page'.

View All Claims - Daily Status – Summary View

This feature provides the user with the ability to filter claim search results by displaying claims that fall on a specific date. When a user would like results for a specific day, click on the daily status tab. A date can be entered manually, or by clicking the calendar icon and selecting the desired date. **Note: Results are only available for the previous 31 days. If a date is selected outside of the 31 days, a message will be displayed indicating “No Records Found”.**

- ▶ The purpose of the Daily Status View is to help users target claims that have had a major change in status, or where a major claim event occurred.

- ▶ The user must first select an activity date. Any date within the past 31 calendar days can be selected, but the default date is always the prior day.



- ▶ Similar to the Current Claims Tab, once an activity date is selected the results will display by default in a Summary View with coverage cards and claim counts for each event or status change that occurred on the date selected.

- ▶ The user can then select one of the following options to view a detailed list of claims:

- ▶ The '>' on one of the coverage cards (will display a list of claims within that coverage type that had an event or status change on the date selected). STD >

- ▶ One of the blue links within the claim coverage cards (will display a list of claims approved on the date selected for the chosen coverage) [Approved](#) 26

- ▶ The 'Detailed Claims View' radio button (will display all coverage types and statuses) Summary View Detailed Claims View

View All Claims - Daily Status Search (continued)

- ▶ Like the Current Claims views, and *any* detailed claims list view, users can [expand the details](#) for each claim, in the resulting list, by clicking the ‘+’ sign or the ‘**Expand All Rows**’ link. To navigate to the Employee’s overall Claim History, click the Employee’s Name. To navigate to additional claim specific details, click the claim number.

Search By Claim Number

To search by Claim Number, follow these steps:

1. First, the user must select a Product.
2. Select the drop-down arrow to view the product choices available. When only one choice is available, the selection will default to that product
3. Select the ‘**Search By**’ drop-down and select ‘**Claim Number**’
4. A Claim Number input field will appear. and then select the ‘**SEARCH**’ button

The screenshot shows the 'Claims Center' search interface. At the top, it says 'Choose a product from the drop-down options'. Below that is a 'Search Options' section with a magnifying glass icon and the text 'Select criteria to begin Search'. There is a 'Select a Product' dropdown menu with 'Disability' selected. Below that is a 'Search By' dropdown menu with 'Claim Number' selected. Underneath the 'Search By' dropdown is a 'Claim Number' input field containing the text '111111111111'. At the bottom of the search options is a blue 'SEARCH' button with a hand cursor over it. Below the button is a small disclaimer: 'By searching a claim, you agree to the privacy terms below*.'

This screenshot shows the 'Claims Center' search interface with the 'Search By' dropdown menu open. The menu is titled 'Search Options' and has the subtitle 'Select criteria to begin Search'. The 'Search By' dropdown is currently open, showing a list of options: 'Search By', 'View Employee Claims', 'View All Claims', and 'Claim Number'. The 'Search By' option is highlighted in blue. An orange arrow points from the 'Search By' dropdown in this screenshot to the 'Search By' dropdown in the previous screenshot.

Searching by Claim Number will bring the user directly to the **Claim Details** page.

Claim Details

The Claim Details page provides the relevant details for a specific claim in one convenient location. After you have completed your Search, you can access the Claim Details from:

1. The Detailed Claims View, by clicking the Claim Number link.
2. The Search Results list, by clicking the Claim Number link.



◆ Name	EE#/SSN	◆ Number	◆ Type
Test User 01	99999	222222222222	LTD

3. From the [Detailed Claims View expanded view](#), click the ‘**VIEW CLAIM DETAILS**’ button.

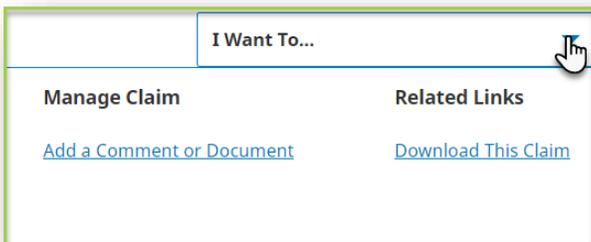
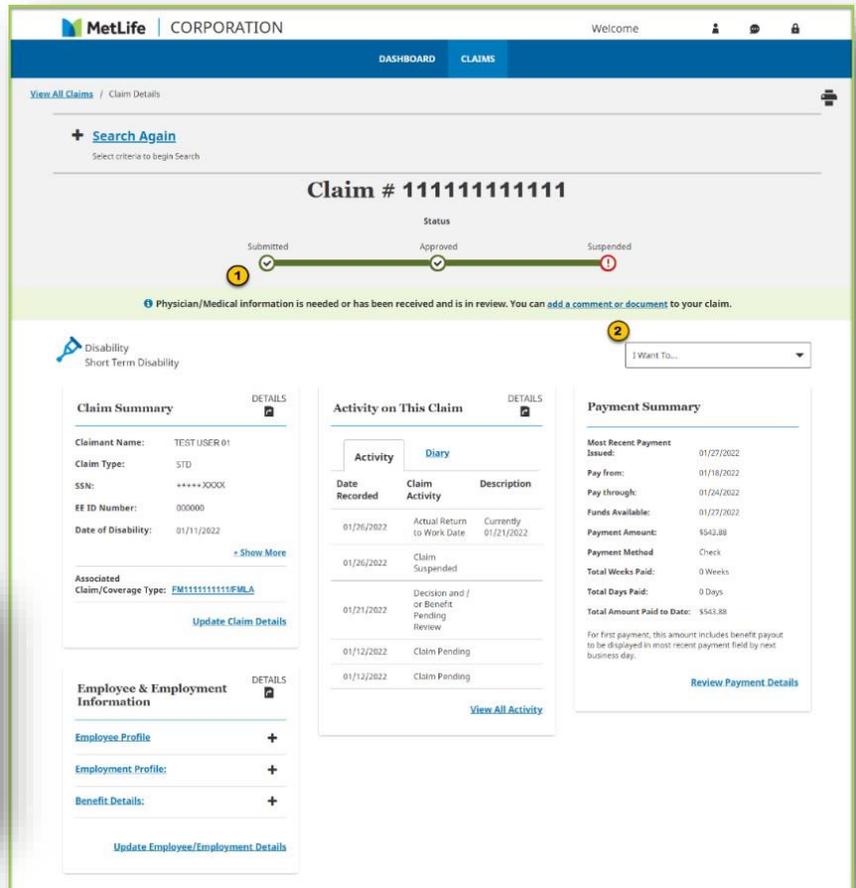


From the Claims Details page, the claim number and status bar will be displayed, along with several card containing claim information. The cards may vary by coverage, but will generally include the following:

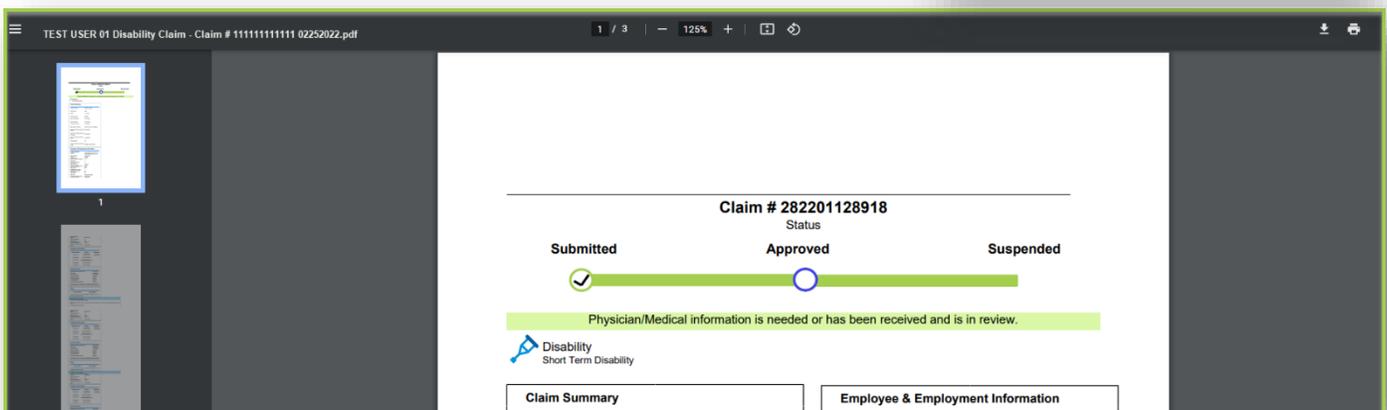
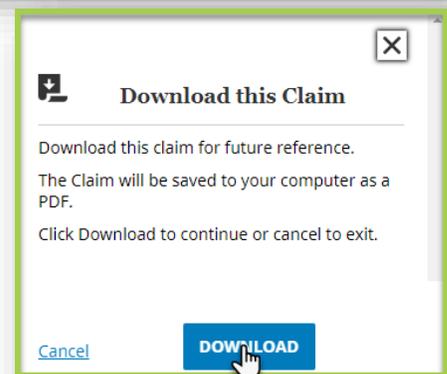
- ▶ **Claim Summary Card:** which provides as summary of all the important claim details
- ▶ **Claim Activity Card:** which shows the key events that have occurred throughout the life of the claim.
- ▶ **Employee and Employment Information:** which verifies important benefit administration work details.
- ▶ **Payment Summary Card** (when applicable): which shows payment information for approved claims.
- ▶ **Appeal Information** (when applicable): which shows highlighted appeal activity and status.
- ▶ **Social Security Information** (when applicable): which shows highlighted social security activity and status.

Claim Details (continued)

- 1 The Claim Status and Progress Bar provides the current status of the claim. Depending on the status, additional messaging may be displayed.
- 2 The 'I Want To' dropdown enables the user to “Add a Comment or Document” and/or to “Download This Claim”.

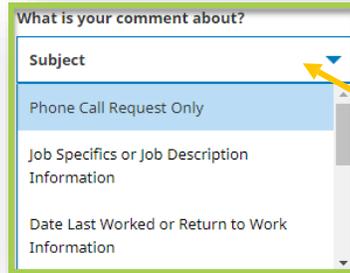


- ▶ To download the claim, click the “[Download This Claim](#)” link. A side pane will open on the right side of the browser window
- ▶ Click the **DOWNLOAD** button to download the claim in PDF format.



Claim Details – Add a Comment or Document

- ▶ To Add a Comment or Document to the claim, Click the “[Add a Comment or Document](#)” link from the ‘I Want To’ menu.
- ▶ Enter the following information accordingly:
 - ▶ Name
 - ▶ E-Mail
 - ▶ Subject
 - ▶ Phone Number
 - ▶ Free Form Comment



What is your comment about?

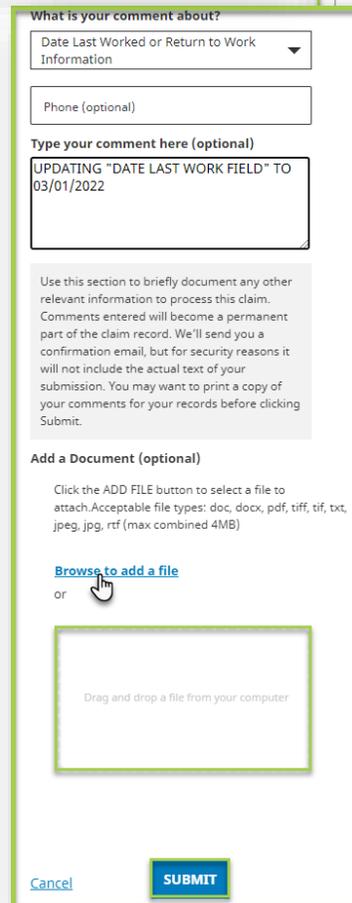
Subject

Phone Call Request Only

Job Specifics or Job Description Information

Date Last Worked or Return to Work Information

- ▶ To Add a Document, drag a file in to the designated area, or click the “[Browse to add a file](#)” link, and select the appropriate file from a PC location. ****Please Note: The current file size limit is 5 MB.**
- ▶ Once the comment and/or document has been added, click the **SUBMIT** button to finish adding the information to the claim. The side pane will close automatically.



What is your comment about?

Date Last Worked or Return to Work Information

Phone (optional)

Type your comment here (optional)

UPDATING "DATE LAST WORK FIELD" TO 03/01/2022

Use this section to briefly document any other relevant information to process this claim. Comments entered will become a permanent part of the claim record. We'll send you a confirmation email, but for security reasons it will not include the actual text of your submission. You may want to print a copy of your comments for your records before clicking Submit.

Add a Document (optional)

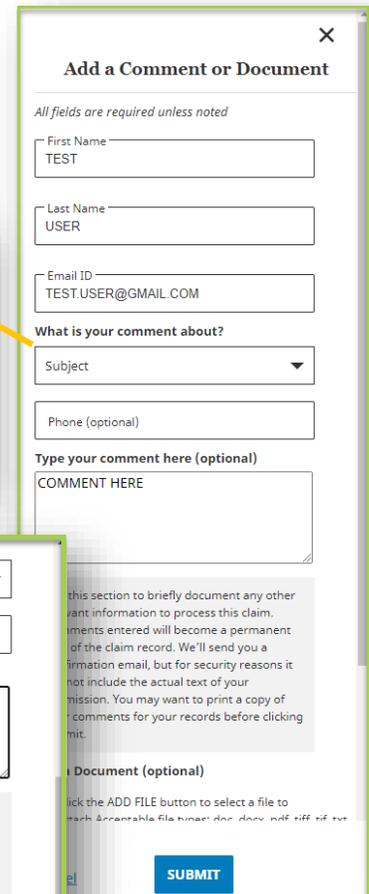
Click the ADD FILE button to select a file to attach. Acceptable file types: doc, docx, pdf, tiff, tif, txt, jpeg, jpg, rtf (max combined 4MB)

[Browse to add a file](#)

or

Drag and drop a file from your computer

Cancel **SUBMIT**



Add a Comment or Document

All fields are required unless noted

First Name
TEST

Last Name
USER

Email ID
TEST.USER@GMAIL.COM

What is your comment about?

Subject

Phone (optional)

Type your comment here (optional)

COMMENT HERE

This section to briefly document any other relevant information to process this claim. Comments entered will become a permanent part of the claim record. We'll send you a confirmation email, but for security reasons it will not include the actual text of your submission. You may want to print a copy of your comments for your records before clicking Submit.

Document (optional)

Click the ADD FILE button to select a file to attach. Acceptable file types: doc, docx, pdf, tiff, tif, txt, jpeg, jpg, rtf (max combined 4MB)

SUBMIT

Claim Details - Claim Summary Card

The claim summary card provides a single location for many of the important claim details such as:

- ▶ Claimant Information
- ▶ Date of Disability
- ▶ Associated Claims (clicking the link will bring the user directly to the Claim Details page of that claim)

Expand this card by clicking the ‘+ Show More’ link to show additional details:

- ▶ Submission Details
- ▶ Benefit Start and End Dates (when available)

Clicking the  icon or the ‘Update Claim Details’ link, the card will be “flipped” and the user will be presented with the option to edit and update select fields (based on user permissions). Editable fields are outlined by a text entry box. The user can then save or cancel those changes by using the Cancel or Save buttons at the bottom of the screen.

Should the user choose to cancel any changes, a confirmation message will display.

Claim Details – Claim Activity Card

The **Activity** tab will include the 5 most recent status updates on the claim, including:

- ▶ The Date the activity was recorded
- ▶ The Claim activity
- ▶ Description of the activity (if available/applicable)

To ‘flip’ the card and view all claim activity, click the  button or ‘**View All Activity**’ link. Display of activity will show up to 10 updates per page, and the user can select additional pages for the claim if applicable. The  icon in the top right of the card can be used to “flip” the card back to the front.

Activity on This Claim DETAILS 

Activity
Diary

Date Recorded	Claim Activity	Description
01/26/2022	Actual Return to Work Date	Currently 01/21/2022
01/26/2022	Claim Suspended	
01/21/2022	Decision and / or Benefit Pending Review	
01/12/2022	Claim Pending	
01/12/2022	Claim Pending	

[View All Activity](#)

Activity on This Claim BACK 

Activity
Diary

↕ Date Recorded	Claim Activity	Description
01/26/2022	Actual Return to Work Date	Currently 01/21/2022
01/26/2022	Claim Suspended	
01/21/2022	Decision and / or Benefit Pending Review	
01/12/2022	Claim Pending	
01/12/2022	Claim Pending	
01/12/2022	Claim Received	

Total Records: 6 Show 10 results per page 

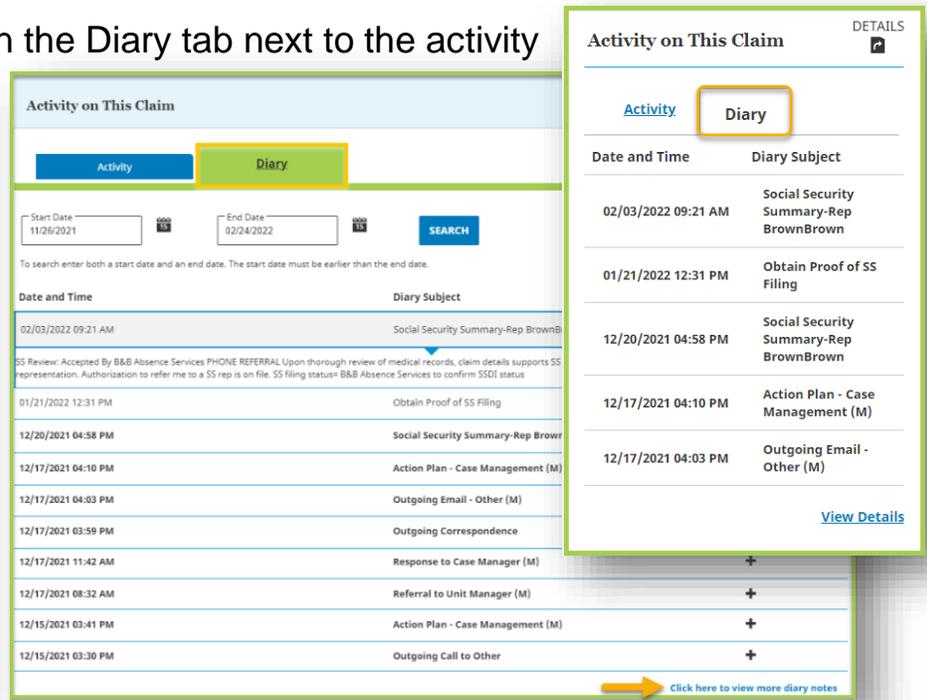
CLOSE

Claim Details - Claim Activity Card – Diary Tab

If your entitlement includes access to diary notes, you will have access to disability claim team notes for a particular disability claim (i.e., STD, LTD, etc..) but it will not include any medical information.

To access the diary notes, click on the Diary tab next to the activity tab.

- ▶ The 5 most recent notes will be displayed.
- ▶ Within the tab, users will see the following columns:
 - ▶ Date and Time
 - ▶ Diary Subject
- ▶ To view additional notes, click the  button or 'View Details' link. The card will 'flip' and additional notes will be displayed (if available).



Date and Time	Diary Subject
02/03/2022 09:21 AM	Social Security Summary-Rep BrownBrown
01/21/2022 12:31 PM	Obtain Proof of SS Filing
12/20/2021 04:58 PM	Social Security Summary-Rep BrownBrown
12/17/2021 04:10 PM	Action Plan - Case Management (M)
12/17/2021 04:03 PM	Outgoing Email - Other (M)
12/17/2021 03:59 PM	Outgoing Correspondence
12/17/2021 11:42 AM	Response to Case Manager (M)
12/17/2021 08:32 AM	Referral to Unit Manager (M)
12/15/2021 03:41 PM	Action Plan - Case Management (M)
12/15/2021 03:30 PM	Outgoing Call to Other

- ▶ Click the 'Click here to view more diary notes' link until all notes are shown. Once all available notes are displayed, the link will no longer be visible.
- ▶ Expand each row by clicking the '+' button to view the detailed notes.
- ▶ Easily search for notes by using the date range filter. Click  once the desired dates are entered. (**Note:** The maximum search interval is 24 months)



Date and Time	Diary Subject
02/03/2022 09:21 AM	Social Security Summary-Rep BrownBrown
01/21/2022 12:31 PM	Obtain Proof of SS Filing
12/20/2021 04:58 PM	Social Security Summary-Rep BrownBrown
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12/17/2021 03:59 PM	Outgoing Correspondence
12/17/2021 11:42 AM	Response to Case Manager (M)
12/17/2021 08:32 AM	Referral to Unit Manager (M)
12/15/2021 03:41 PM	Action Plan - Case Management (M)
12/15/2021 03:30 PM	Outgoing Call to Other

Claim Details - Employee and Employment Information Card

To review an Employee Profile, Employment Profile, and/or Benefit Details information, select the expand icon '+' or the related link. This will expand the Information specific to that category. The information is viewable but not editable.

Clicking all the links (e.g. underlined Employee Profile, Employment Profile, and Benefit Details), the entire card will expand with the section heading and its information

- ▶ Upon clicking the  icon or the 'Update Employee/Employment Details' link, the card will be "flip" and the user will be presented with the option to edit and update select fields (based on user permissions).

- ▶ Editable fields are outlined by a text entry box. The user can then save or cancel those changes by using the 'CANCEL' or 'NEXT' buttons at the bottom of the screen.

- ▶ The fields with new values will be display for review before clicking 'SUBMIT'



Employee & Employment Information BACK

Please review and confirm the following updates before submitting them. Go Back to make changes. Your case manager will need time to process these updates before you see changes on our website.

Address1	321 FAKE STREET
City	NOWHERE
State	New York
Zip Code:	22222
Home Phone:	
Regular Work Hours:	35

[CANCEL](#) [Back](#) [SUBMIT](#)



Employee & Employment Information DETAILS

[Employee Profile](#) 

[Employment Profile:](#) 

[Benefit Details:](#) 

[Update Employee/Employment Details](#)



Employee & Employment Information BACK

Employee Profile

Address1: 123 Fake Street

Address2:

Address3:

City: ANYWHERE

State: New York

Zip Code: 11111

Home Phone: (555) 555 - 5555

Gender: Male Female

Marital Status: Single

Marital Status for Federal Tax Filing: S

Number of Federal Exemptions: 0

Report Number: 000000

Division Code/Sub-Code: 0000

Branch/Sub-Point: 0000

Plan Code: 000

Regular Work Hours:

Work State: NC

Job Class: S

Job Title: Worker

Insurance Effective Date: 06/17/2018

Employment Date: 03/05/2001

Salary: \$33,550.00

Salary Frequency: Y

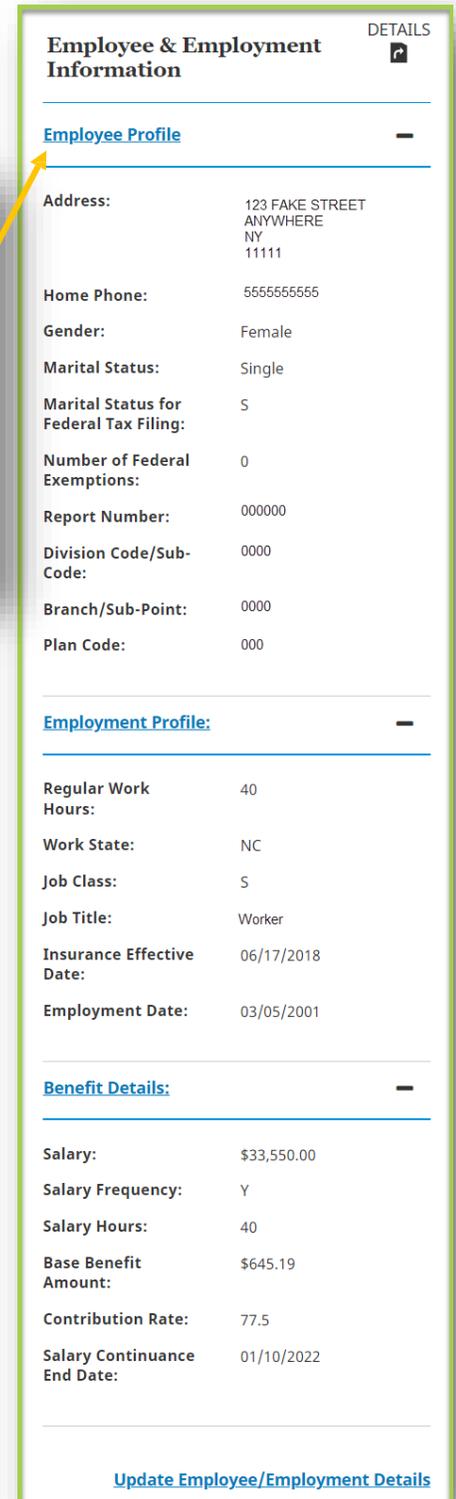
Salary Hours: 40

Base Benefit Amount: \$645.19

Contribution Rate: 77.5

Salary Continuance End Date: 01/10/2022

[Cancel](#) [NEXT](#)



Employee & Employment Information DETAILS

[Employee Profile](#) 

Address: 123 FAKE STREET
ANYWHERE
NY
11111

Home Phone: 5555555555

Gender: Female

Marital Status: Single

Marital Status for Federal Tax Filing: S

Number of Federal Exemptions: 0

Report Number: 000000

Division Code/Sub-Code: 0000

Branch/Sub-Point: 0000

Plan Code: 000

[Employment Profile:](#) 

Regular Work Hours: 40

Work State: NC

Job Class: S

Job Title: Worker

Insurance Effective Date: 06/17/2018

Employment Date: 03/05/2001

[Benefit Details:](#) 

Salary: \$33,550.00

Salary Frequency: Y

Salary Hours: 40

Base Benefit Amount: \$645.19

Contribution Rate: 77.5

Salary Continuance End Date: 01/10/2022

[Update Employee/Employment Details](#)

Claim Details – Payment Summary Card

The Payment Summary Card can also be found on the Claim Details Page, but will only be displayed if:

- ▶ A payment has been issued OR
- ▶ The Employer has been advised to make the benefit payment (Advice To Pay – ATP)

The Payment Summary Card will have important payment details including:

- ▶ Pay From and Pay Through dates
- ▶ Date When Funds are Available
- ▶ Most Recent Payment Date and Amount
- ▶ Payment Method
- ▶ Total Amount Paid to Date
- ▶ Next Check Release Date

Payment Summary

Most Recent Payment Issued:	12/31/2021
Pay from:	11/30/2021
Pay through:	12/26/2021
Funds Available:	01/05/2022
Payment Amount:	\$2,201.36
Payment Method	Direct Deposit
Total Weeks Paid:	0 Weeks
Total Days Paid:	0 Days
Total Amount Paid to Date:	\$5,745.87

For first payment, this amount includes benefit payout to be displayed in most recent payment field by next business day.

Next Check Release Date: 03/01/2022

[Review Payment Details](#)

For more itemized payment information, click the **'Review Payment Details Link'**. Each payment will be listed along with the Pay From and Pay Through Dates, Payment Method, and Payment Amount. The last 10 payments are displayed on each page by default. To view more payments per page, use the results per page drop down to select from the available options. Click  to return to the Claim Details Page

Payment Details



↕ Pay from:	↕ Pay through:	↕ Payment Method	↕ Payment Amount:
02/14/2022	02/20/2022	Direct Deposit	\$337.08
02/07/2022	02/13/2022	Direct Deposit	\$337.08
02/01/2022	02/06/2022	Direct Deposit	\$293.46
01/24/2022	01/31/2022	Direct Deposit	\$414.29
01/17/2022	01/23/2022	Direct Deposit	\$540.65
01/10/2022	01/16/2022	Direct Deposit	\$540.65
01/03/2022	01/09/2022	Direct Deposit	\$540.65
12/27/2021	01/02/2022	Direct Deposit	\$540.65
11/30/2021	12/26/2021	Direct Deposit	\$2201.36

Total Amount Paid to Date: **\$5745.87**

Total Records: 9

 Show 10 results per page ▼

Claim Details - Appeal Information Card

The Appeal Information Card displays information regarding a claim's appeals (if applicable). Details include:

- ▶ Date Received
- ▶ Acknowledgement Letter date
- ▶ Decision and Date
- ▶ Status and Date
- ▶ Determination Due Date and Reason

Appeal Information	
Date Received:	02/18/2020
Acknowledgement letter sent:	02/18/2020
Decision & Date:	Case Manager Overturned Decision on 02/18/2020
Status & Date:	Open on 02/18/2020
Determination due date:	02/18/2020
Determination Due Date Reason Description:	Original

For additional help, select the , and a definition will be provided.

Claim Details – Add a Comment or Document

A user can add a comment or upload documentation to the claim via a secure portal. Select the **'Add A Comment or Document'** link underneath the claim number in the top portion of the screen, or, select the option from the **'I Want To'** menu.



Claim # 111111111111

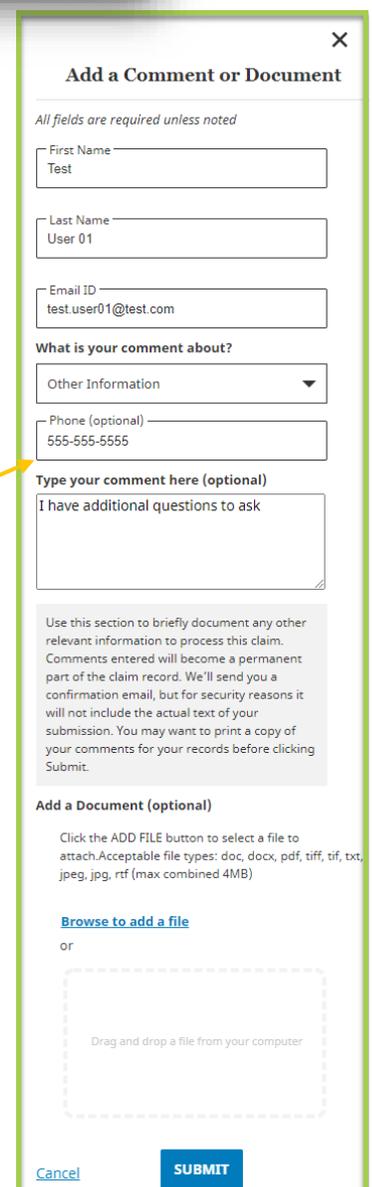
Status

Submitted Approved Suspended

Physician/Medical information is needed or has been received and is in review. You can add a comment or document to your claim.

I Want To...

After entering contact information, the user can type a comment or upload a document. A document can be dragged into the designated area or selected from a specific file location to be uploaded to the claim. Once the desired information/document(s) have been added, Click the **'SUBMIT'** button to send.



Add a Comment or Document

All fields are required unless noted

First Name
Test

Last Name
User 01

Email ID
test.user01@test.com

What is your comment about?
Other Information

Phone (optional)
555-555-5555

Type your comment here (optional)
I have additional questions to ask

Use this section to briefly document any other relevant information to process this claim. Comments entered will become a permanent part of the claim record. We'll send you a confirmation email, but for security reasons it will not include the actual text of your submission. You may want to print a copy of your comments for your records before clicking Submit.

Add a Document (optional)

Click the ADD FILE button to select a file to attach. Acceptable file types: doc, docx, pdf, tiff, tif, txt, jpeg, jpg, rtf (max combined 4MB)

Browse to add a file

or

Drag and drop a file from your computer

Cancel SUBMIT