



Legacy Documents Search

Quick Reference Guide

Legacy Documents Search

Documents that providers submitted in the legacy system or generated by the legacy system are referred to as legacy documents.

Providers enrolled with the legacy system and migrated to the WCMBP System are referred to as legacy providers.

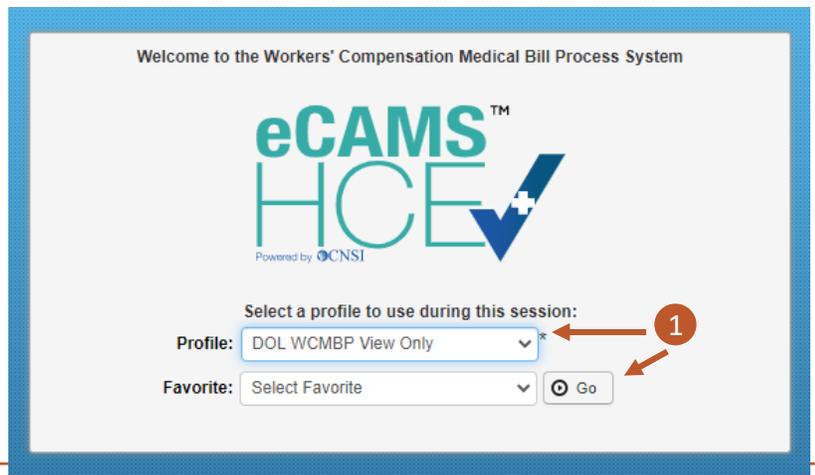
This document outlines the process to search and view such legacy documents, like correspondences and attachments for bill/authorization in the WCMBP System. It describes the required profiles and steps to be followed for Legacy Providers, CNSI Operations Staff, and DOL staff.

Legacy Documents Under Admin Menu

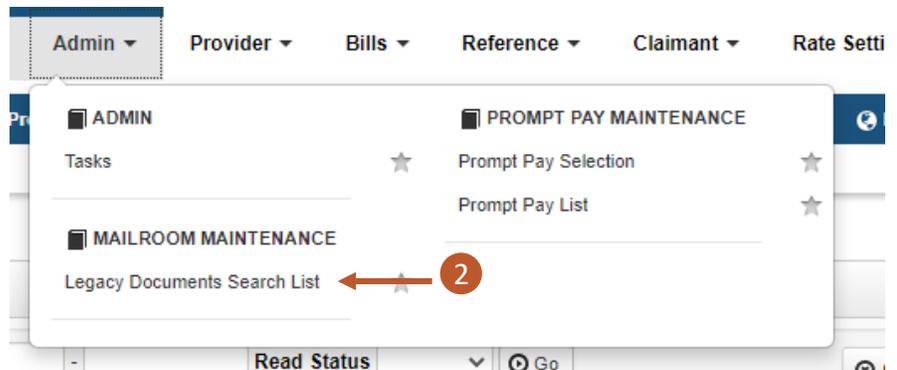
1. Select the applicable profile from the **Profile** drop-down list and select **Go**.

Note: Users who have access to one of the following profiles can access Legacy Documents under Admin menu. This list has all legacy documents that can be searched using TCN or Provider ID.

- DOL Bills Resolution Specialist
- DOL WCMBP View Only



2. Select **Legacy Documents Search List** option from the **Admin** menu. Initially, the system doesn't display any records.



The next section will provide two different examples of how to utilize the filters on the Legacy Documents Search List page to retrieve legacy documents.



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Legacy Documents Under Admin Menu

EXAMPLE 1 – Search for RVs for a specific Provider.

1. Select the **Filter By** drop-down to select filter criteria option. For this example, we will select the **WCMBP Provider ID** filter option.

The screenshot shows the 'Legacy Documents Search List' interface. The 'Filter By' dropdown menu is open, displaying a list of filter options: Authorization ID, Claimant ID, DCN, File Name, Image Title, Parent DCN, Program Name, Provider Tax ID, Received Date, TCN, and WCMBP Provider ID. A red arrow labeled '1' points to the dropdown menu. The search criteria field is empty, and the 'Go' button is visible. The table below shows columns for DCN, WCMBP Provider ID, Claimant ID, TCN, and File Name, with a 'No Records Found!' message at the bottom.

2. Enter the **WCMBP Provider ID** in the blank field to the right of the selected filter option.

The screenshot shows the 'Legacy Documents Search List' interface. The 'Filter By' dropdown is now set to 'WCMBP Provider ID', and the value '117' has been entered in the adjacent search field. A red arrow labeled '2' points to the search field. The 'Go' button is visible. The table below shows columns for DCN, Program Name, WCMBP Provider ID, Claimant ID, TCN, File Name, Image Title, Received Date, and Provider Tax ID, with a 'No Records Found!' message at the bottom.

3. In the next drop-down field, select the **Image Title** filter option.

The screenshot shows the 'Legacy Documents Search List' interface. The 'Filter By' dropdown is set to 'WCMBP Provider ID' with '117' entered. The second 'And' dropdown menu is open, showing a list of filter options: Authorization ID, Claimant ID, DCN, File Name, Image Title, Parent DCN, Program Name, Provider Tax ID, Received Date, TCN, and WCMBP Provider ID. A red arrow labeled '3' points to the dropdown menu. The 'Go' button is visible. The table below shows columns for DCN, Program Name, WCMBP Provider ID, Claimant ID, TCN, File Name, Image Title, Received Date, and Provider Tax ID, with a 'No Records Found!' message at the bottom.

4. Enter the Image Title as **Remit%** in the blank field to the right of the selected filter option and then select the **Go** button.

The screenshot shows the 'Legacy Documents Search List' interface. The 'Filter By' dropdown is set to 'WCMBP Provider ID' with '117' entered. The second 'And' dropdown is set to 'Image Title', and the value 'Remit%' has been entered in the adjacent search field. A red arrow labeled '4' points to the search field. The 'Go' button is visible. The table below shows columns for DCN, Program Name, WCMBP Provider ID, Claimant ID, TCN, File Name, Image Title, Received Date, and Provider Tax ID, with a 'No Records Found!' message at the bottom.



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EXAMPLE 1 Continued – Search for RVs for a specific Provider.

- By default, the system retrieves all documents received. In order to view document received within the last 6, 12 or 24 months, select a different value for the **Received In** filter.

Legacy Documents Search List

Filter By : WCMBP Provider ID 117 And Image Title Remit%

Received In All

DCN	Program Name	WCMBP Provider ID	Claimant ID	TCN	File Name	Image Title	Date	Provider Tax ID
202004260002671	DFEC				1172032001120200430010.pdf	Remittance Vouchers	04/30/2020	
202004260003953	DFEC				1172032000220200430010.pdf	Remittance Vouchers	04/30/2020	
202004260003956	DFEC				1172032000320200430010.pdf	Remittance Vouchers	04/30/2020	

- Select the **DCN** hyperlink to view the RV.

Legacy Documents Search List

Filter By : WCMBP Provider ID 117 And Image Title Remit%

Received In Last 12 months

DCN	Program Name	WCMBP Provider ID	Claimant ID	TCN	File Name	Image Title	Received Date	Provider Tax ID
202004260002671	DFEC				1172032001120200430010.pdf	Remittance Vouchers	04/30/2020	
202004260003956	DFEC				1172032000320200430010.pdf	Remittance Vouchers	04/30/2020	

EXAMPLE 2 – Search for 1099s.

- Select the **Filter By** drop-down to select filter criteria option. For this example, we will select the **Image Title** filter option.

Legacy Documents Search List

Filter By : [Dropdown] And [Blank] [Blank] Received In All

Image Title

No Records Found !

- Enter the Image Title as **1099** in the blank field to the right of the selected filter option and then select the **Go** button.

Legacy Documents Search List

Filter By : Image Title 1099 And [Blank] [Blank] Received In All

Go

No Records Found !



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EXAMPLE 2 Continued – Search for 1099s.

3. Select the **DCN** hyperlink to view the 1099.

DCN	Program Name	WCMBP Provider ID	Claimant ID	TCN	File Name	Image Title	Received Date	Provider Tax ID
202001280008756	DFEC				39199896120200124O.pdf	1099	01/24/2020	391998961
202001280008785	DFEC				36470120320200124O.pdf	1099	01/24/2020	364701203

The next section will explain how to view legacy documents at the Provider Level.



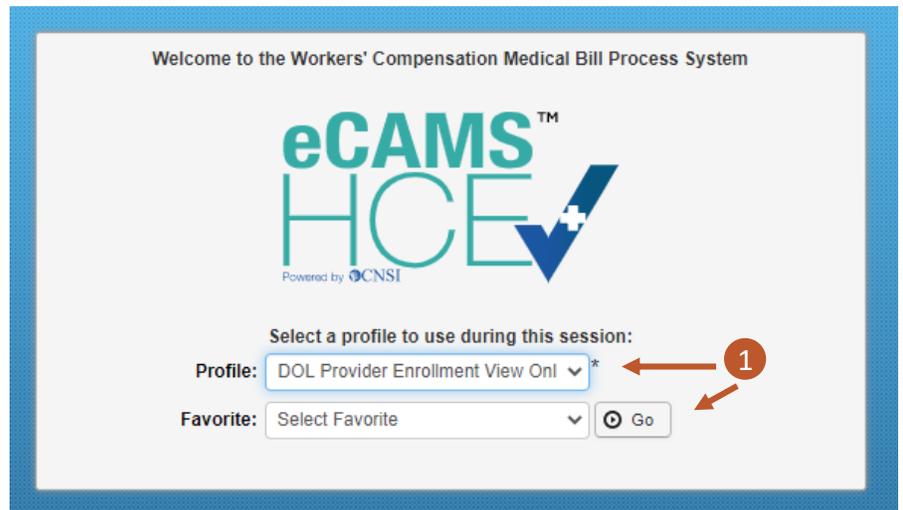
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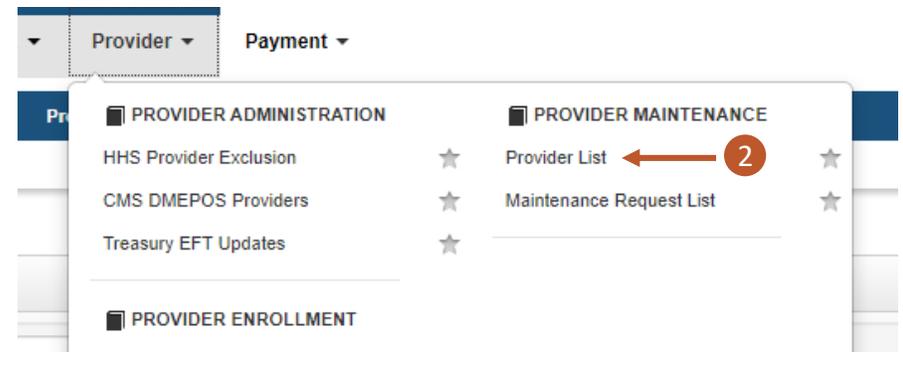
Legacy Documents at Provider Level

DOL Staff who are responsible for tasks related to provider enrollment or authorization review may not have access to the required profiles in order to view documents under the Admin menu. These users can access legacy documents at the provider level, as demonstrated in the steps below.

1. Select a profile from the **Profile** drop-down list and select **Go**.
 - DOL Provider Enrollment View Only



2. Select the **Provider List** menu option under the **Provider** tab.



EXAMPLE 1 – Search for RVs for a specific Provider.

1. Select the **Filter By** drop-down to filter criteria option. For this example, we will filter by **OWCP ID**.





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Legacy Documents at Provider Level

EXAMPLE 1 Continued – Search for RVs for a specific Provider.

2. Enter the **OWCP ID** in the blank field to the right of the selected filter option and then select the **Go** button.

Provider List

Filter By: OWCP ID 98 And

Program Alternate Identifier Go

Clear Filter Save Filter My Filters

3. Click the **OWCP ID** hyperlink. The system displays the provider's basic information.

Provider List

Filter By: OWCP ID 98 And

Program Alternate Identifier Go

Clear Filter Save Filter My Filters

OWCP ID	Provider Name	NPI	Enrollment Type	Provider Type	Program	Business Status	Business Status Start Date	Business Status End Date	Created Date
98		10	Group Practice	25-Physician (MD) & Physician (DO)	DFEC,DEEOIC	Active	01/01/1964	12/31/2999	04/23/2020

4. Select the **Retrieve Correspondence** button.

OWCP ID/NPI: 98 / 10 Name: 4

Close Save Approve Reject View History Notes Generate Correspondence Retrieve Correspondence

Provider Details

Provider Type: 25-Physician (MD) & Physician (DC) *
Category of Service
If you select "Other Provider" (96) or Non-Medical Vendor (53), please explain:

5. The system displays the Correspondence Retrieval (provider letters) grid and Images/Attachments (RV, ACH form, 1099 form, bills/authorization attachments) grid.

Correspondence Retrieval Page

Filter By: And And

Clear Filter Save Filter My Filters

E2 VAULT KEY	CORRESPONDENCE TITLE	SENT BY	SENT DATE	JOB TYPE	STATUS	OWCP ID
PE515360156	OWCP Registration letter	Administrator,Super	04/16/2020	PC	File Archived	98
PE515284523	026 - Provider Welcome Letter	Administrator,Super	04/16/2020	PC	File Archived	98

View Page: 1 Go Page Count Viewing Page: 1 First Prev Next Last

SaveToCSV

Upload Images/Attachments

Images/Attachments Retrieval Page

Filter By: And And

Clear Filter Save Filter My Filters

REPOSITORY KEY	IMAGE TITLE	CREATED BY	CREATED DATE	RECEIVED DATE	OWCP ID
IMG99976480	Bills-HCFA	DataConversionProcess	04/21/2020	04/13/2015	98
IMG99336364	Bills-HCFA	DataConversionProcess	04/21/2020	04/13/2015	98



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Legacy Documents at Provider Level

EXAMPLE 1 Continued – Search for RVs for a specific Provider.

6. In the second grid select the **Image Title** filter option.

Images/Attachments Retrieval Page

Filter By : **Image Title** And And

Application Number
Claimant Id
Image Title
OWCP ID
PA Request Number
Provider Location Id
RV Number
Received Date

Clear Filter Save Filter My Filters

REPOSITORY KEY	IMAGE TITLE	CREATED BY	CREATED DATE	RECEIVED DATE	OWCP ID
IMG90976	DataConversionProcess	DataConversionProcess	04/21/2020	04/13/2015	980

7. Enter the Image Title as **Remit%** in the blank field to the right of the selected filter option and then select the **Go** button.

Images/Attachments Retrieval Page

Filter By : Image Title And And

Go

8. The system displays Remittance Voucher(s) for this provider. Select the **Repository Key** hyperlink to open/view a RV.

Images/Attachments Retrieval Page

Filter By : Image Title And And

Go

REPOSITORY KEY	IMAGE TITLE	CREATED BY	CREATED DATE	RECEIVED DATE	OWCP ID
IMG91473304	Remittance Vouchers	DataConversionProcess	04/21/2020	12/26/2013	980
IMG90918237	Remittance Vouchers	DataConversionProcess	04/21/2020	08/07/2014	980
IMG90511155	Remittance Vouchers	DataConversionProcess	04/21/2020	08/21/2014	980

The next section will explain how to view legacy documents from the Provider Portal.



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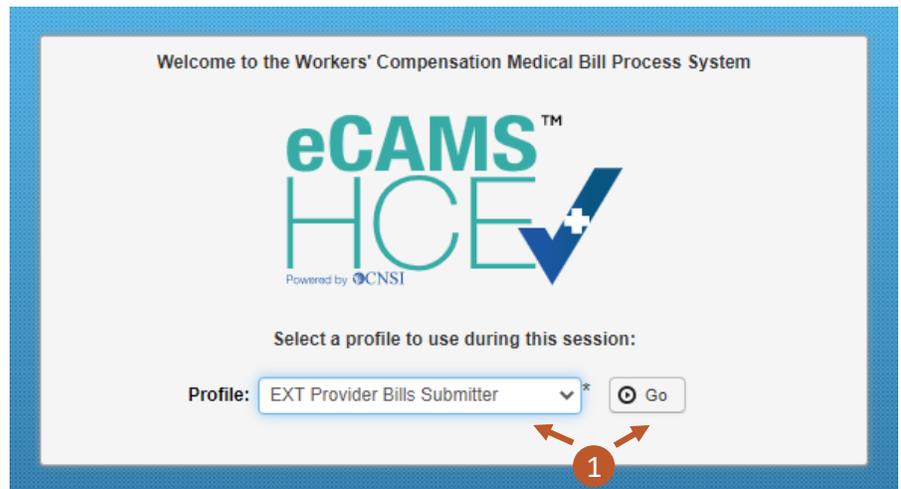
Legacy Documents from the Provider Portal (**Providers**)

The Provider can view legacy documents via the Provider portal.

1. After logging into the WCMBP System and selecting the Provider ID, select a profile from the **Profile** drop-down list and select **Go**.

Note: You can use one of the following profiles:

- EXT Provider Bills Submitter
- EXT Provider Super User

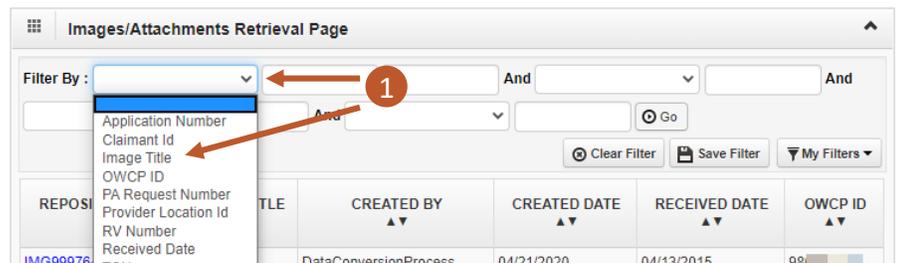


2. Select the **Correspondences** hyperlink under the **My Interactions** menu.



EXAMPLE 1 — Search for RVs for a logged-in Provider.

1. Search can be performed using TCN, Image Title or Case Number. In the second grid (Images/Attachments Retrieval Page), select the **Image Title** filter option.





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Legacy Documents from the Provider Portal (Providers)

EXAMPLE 1 Continued – Search for RVs for a logged-in Provider.

2. Enter the Image Title as **Remit%** in the blank field to the right of the selected filter option.

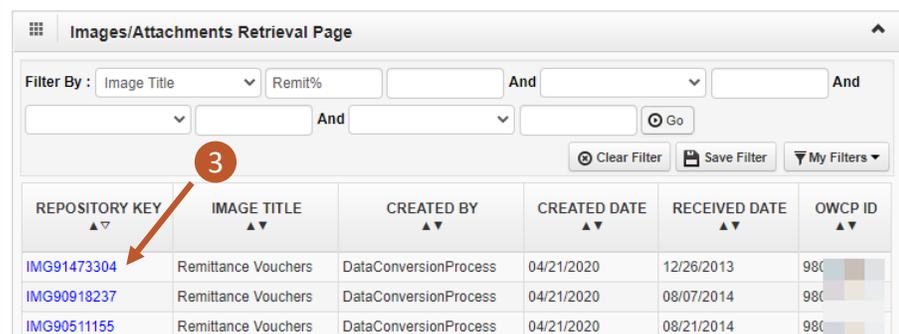


Images/Attachments Retrieval Page

Filter By : Image Title ▼ Remit% [] And [] And []

[] And [] [] [] Go

3. The system displays remittance vouchers. Select the **Repository Key** hyperlink to open/view an attachment.



Images/Attachments Retrieval Page

Filter By : Image Title ▼ Remit% [] And [] And []

[] And [] [] [] Go

Clear Filter Save Filter My Filters ▼

REPOSITORY KEY ▲▼	IMAGE TITLE ▲▼	CREATED BY ▲▼	CREATED DATE ▲▼	RECEIVED DATE ▲▼	OWCP ID ▲▼
IMG91473304	Remittance Vouchers	DataConversionProcess	04/21/2020	12/26/2013	980
IMG90918237	Remittance Vouchers	DataConversionProcess	04/21/2020	08/07/2014	980
IMG90511155	Remittance Vouchers	DataConversionProcess	04/21/2020	08/21/2014	980