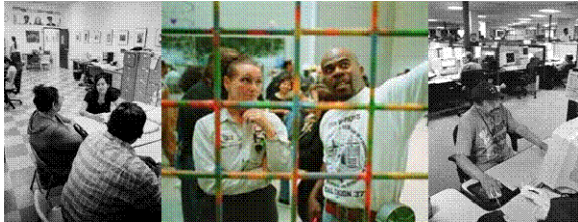


Division of Workers' Compensation

EAMS Electronic Adjudication Management System
CA Department of Industrial Relations

EAMS Train the Trainers Sessions August 14-15, 2008



The Training Team

Judge Colleen Casey, DWC	Denise Spelzini, SCIF
Judge Jorja Frank, DWC	Evelyn Gotera, SCIF
Judge Roger Tolman, DWC	Cheryl Kurpieski, Majestic Insurance
Judge Mark Fudem, DWC	Aida B. Cook, Zurich
Judge Charles Ellison, DWC	Nancy Heredia, Employers Insurance
Jackie McConnie, DWC	Marc Glaser, Liberty Mutual
Richard Neumann, DWC	Gina Gartison, Liberty Mutual
Melissa Hicks, DWC	Jett Ricafort, CompWest
Peter Melton, DWC	Kim Lincoln-Hawkins, EDD
Susan Gard, DWC	Linda Atcherly, CAAA
William Giden, DWC	
Linda Enriquez, DWC	
Yvonne Lang, Pearlman, Borska & Wax	
Renee Sherman, Floyd, Skeren & Kelly	
Wolf Schubert, Law Offices of T. Mae Yoshida	
Lorna A. Voboril, Law Office of Lorna A. Voboril	

The Paper Dilemma



3



What EAMS Does

- Integrates disparate DWC units into one seamless case management model
- Simplifies and improves DWC's case management process
- Better serves injured workers and employers
- Streamlines process of creating cases, setting hearings, serving decisions, orders/awards
- Improves access to electronic case records while preserving confidentiality and strengthening security
- Eases transfer of case information between district offices
- Reduces environmental and physical stress—along with storage needs—through reduced use of paper
- Gathers information to help guide policy decisions and better allocate resource work load



4



Today's Process Stuff

- Focus on filing, not working in EAMS
- Going FAST
- Moderator to keep us on track
- Presentations, followed by Q&A
- Materials on CD
- Restrooms
- Cell phones off



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Agenda

- **10-10:15 a.m.:** Overview of EAMS and purpose of training
- **10:15-10:30 a.m.:** Assigned names
- **10:30-10:45 a.m.:** Decision point: e-forms or OCR forms?
- **10:45-11 a.m.:** Q&A panel on assigned names and decision point
- **11-11:30 a.m.:** OCR form filing
- **11:30 a.m.-noon:** Q&A panel on OCR form filing
- **Noon-1 p.m.:** Lunch on your own
- **1-1:30 p.m.:** E-form trial overview and computer based training review for e-form filers
- **1:30-2 p.m.:** Q&A on e-form filing
- **2-2:30 p.m.:** CD filing bridge
- **2:30-2:45 p.m.:** Q&A on CD filing bridge
- **2:45-3:30 p.m.:** EAMS help desk + Q&A on help desk



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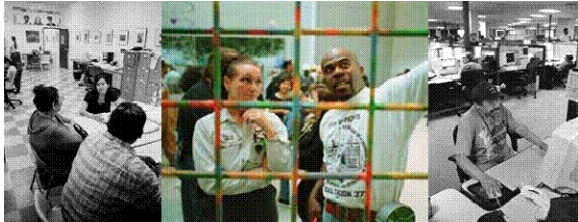


Division of Workers' Compensation

EAMS Electronic Adjudication Management System



CA Department of Industrial Relations

EAMS Assigned Names



Uniform Assigned Names

- Proposed Rule 10217
- Participant matching on forms
- Claims administrators' offices
- Representatives' offices
- Matching on name only



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Pre-registration

- 1400 representatives' offices
- Law firm CD's
- 35 case threshold
- 700 claims administrators' offices
- 50 case threshold
- Name = name/location combination
- Assigned by DWC
- Posted on Web site & updated



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Live Registration

- Central Registration Unit (CRU)
- E-mail cru@dir.ca.gov
- Fax 1-888-822-9309
- New offices and changes
- Preferred method of service
- E-forms trial logons



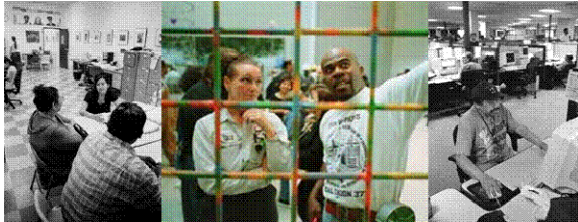
10



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EAMS Electronic Adjudication Management System
CA Department of Industrial Relations

EAMS Decision Point: Are You an E-form or Paper Form Filer?



Main Decision Considerations

- EAMS filing methods
- Advantages and disadvantages of each
- Timing of when each method can be used
- Available resources



Submitting forms in EAMS

- Currently ONLY two methods to get forms and documents into EAMS:
 - ✓ **E-forms**
 - ✓ **Paper OCR forms**
- When EAMS goes live which one will you be using?



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EAMS E-Forms

- Web-based
- Filled out / submitted electronically on line
- Structured tabbed format
- Filled out one at a time
- Do not auto-populate
- Require a logon and password to access
- Each tab/page must be printed to serve



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EAMS OCR Forms

- Paper
- Files submitted same as current process (by mail or in person)
- Require files to be structured using new cover sheets and document separator sheets
- Available on DWC Web site without logon after go-live
- Auto-populate “ready”



EAMS Filing Method Major Considerations

Neither filing method is perfect and both have potential impacts on your business process (depending on how you work now) and how district offices will function (depending on the amount of paper received)

	E-forms	OCR forms
External user business process	Enter data individually	Auto-populate ready
DWC district offices	Submitted directly to EAMS	Scanning required
Printing for service	Print each e-form one tab/page at a time and serve by mail or agreement	Print entire form at once through auto-populate process
File setup	System automatically structures file	User must structure file for submission with cover sheets and document separators



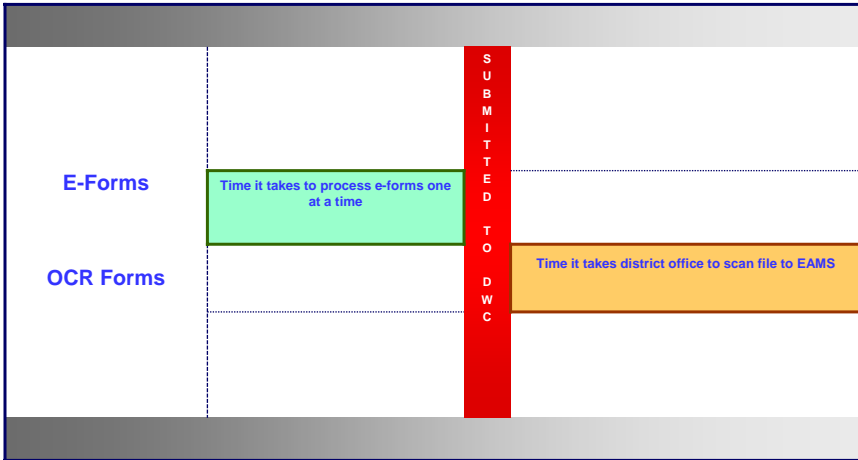
EAMS Filing Method Major Considerations

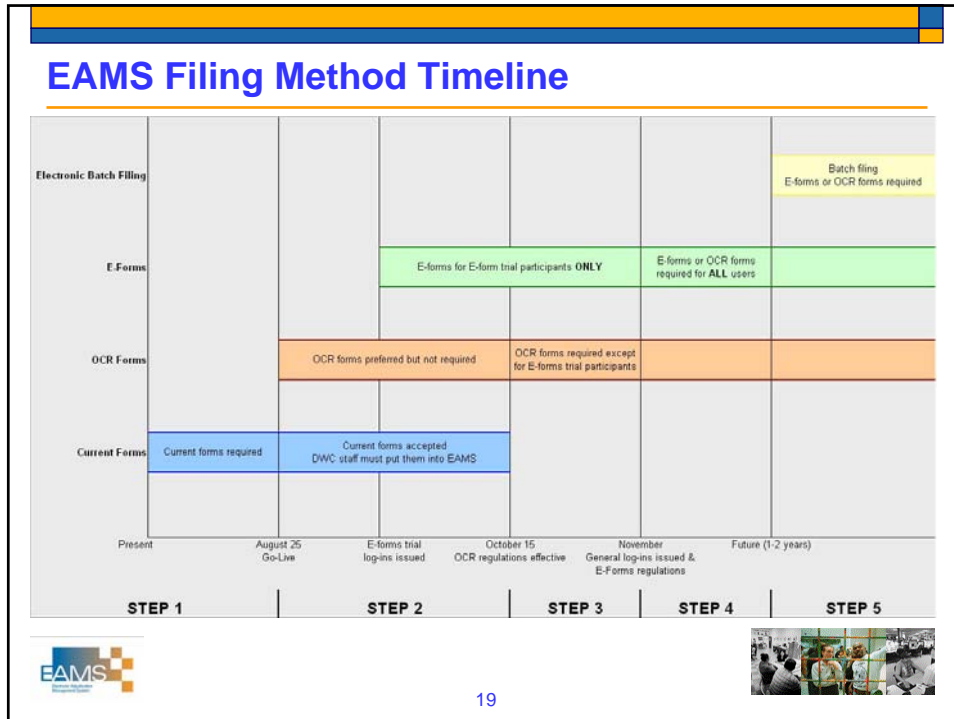
- Another way to think about this is that initially there will be some processing time, either on your side or the district office side
 1. E-forms don't auto-populate so it will take more time to fill each one out in the single-user-to-form electronic interface
 - ✓ Once you click submit, it goes into EAMS for processing
 2. OCR forms are "auto-populate ready." That is, DWC designed them so developers could make them work in case management systems that auto-populate forms
 - ✓ Those forms must then be scanned into EAMS by district office staff



EAMS Filing Method Major Considerations



Processing time diagram





Filing Method Action Items

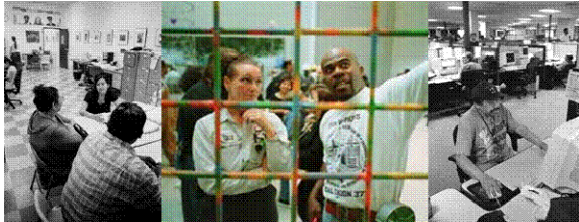
- **OCR forms test lab: EAMS@dir.ca.gov “Test Lab Reservation”**
 - ✓ DWC headquarters offices in Oakland
 - ✓ Four computers with access to a printer and scanning environment to ensure forms you’ve developed function with OCR software
 - ✓ Space for your laptops
- **E-forms trial: EAMS@dir.ca.gov “E-Forms Trial Request”**
 - ✓ Begins ASAP after Sept. 4, continues until EAMS generally available
 - ✓ You must file all documents in EAMS using e-forms for duration of trial
 - ✓ You must have status of party, lien claimant or representative
 - ✓ Participation is at all your locations unless you specify to the contrary, and specify the applicable location(s)
 - ✓ Your **location** gets one logon and password (i.e., each claims administration **office**, representative **office**, lien claimant **filing office**, etc)
 - ✓ You must designate one person responsible for the logon issued to your location

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EAMS Electronic Adjudication Management System
CA Department of Industrial Relations


Q&A Panel: Assigned Names and Decision Point



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EAMS Electronic Adjudication Management System
CA Department of Industrial Relations

OCR Form Filing



OCR Form Filing Introduction

- For optical character recognition (OCR) forms users
- Cover how to obtain OCR forms and how to prepare documents for filing with the district offices



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OCR Form Filing Agenda

- The importance of filing using OCR forms
- The timeline for when the forms should be used
- The uses of the “Cover Sheet” and “Document Separator Sheet”
- Samples for filing packages at district offices using the OCR forms and unstructured forms



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OCR Form Filing Vocabulary

- OCR forms are “optical character recognition” forms
- Cover sheet: an OCR form required as the first document of every document submission to district office
- Document separator sheet: OCR form used to separate and identify documents being filed



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OCR Form Filing Importance

- As of 8/25/2008, EAMS will be *the* management system for the WCAB and each of the district offices
- The OCR form is a specially developed form that is read by EAMS in the scanning process to populate an EAMS case file and reduces clerical time to process files
- OCR forms include a DOR or application as well as settlement documents and rehabilitation documents



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OCR Form Filing Importance Contd.

- There were 138,615 applications; 335,599 DOR's and 333,421 hearings held in 2007
- Use of the proper form ensures speedy processing of these documents and timely setting of the file for hearing
- If you use an "old" form DOR or application then the information has to be entered in by the district office clerical staff, which increases time for processing your documents



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OCR Cover Sheets

- The "Document Cover Sheet" is an OCR form that is the first sheet of every submission
- Form is multi-page, with general case information, including where the filing needs to be stored, i.e., ADJ, DEU, etc.
- Filed whether the next form is also an OCR form or not



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OCR Document Separator Sheets

- The “Document Separator Sheet” is an OCR form that separates the documents being filed
- A one page form that tells EAMS what document is being submitted and where to put it
- For example, a document separator sheet goes between each doctor’s report being submitted or between the DOR and the doctor’s report
- It would also go between the document cover sheet and the next document whether or not it is an OCR form



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OCR Form Filing Rules: All Documents

- All documents filed with district office must be flat, never folded, no staples, paperclips, two hole punches or extraneous marks
- If mailed they need to be mailed in a manila envelope with no folds, creases, paper clips or staples
- Failure to do this will result in scanning errors and delays in filing documents



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OCR Form Filing Rules: All Documents

- BE FIRST GENERATION FORMS
- Documents must be single sided, black ink on white paper, serif font, 8-1/2 x 11, 12 pound or heavier, no text in margins
- EAMS or legacy number on first page caption; attorneys caption for legal pleadings
- Failure to do this will result in scanning errors and delays in filing documents



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OCR Form Filing Sample: Application

- Cover sheet (prepare & print)
- Document separator sheet (prep & print)
- Application for adjudication of claim (prep & print)
- DWC1, 4906g, fee disclosure
- Proof of service of the above



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OCR Form Filing Sample: DOR

- Cover sheet (prepare & print)
- Document separator sheet (prep & print)
- Declaration of readiness to proceed (prep & print)
- Document separator sheet (prep & print)
- Dr. A report
- Document separator sheet (prep & print)
- Proof of service of the above



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OCR Form Filing Sample: Unstructured Form

- Cover sheet (prepare & print)
- Document separator sheet (prep & print)
- Your pleading or other document such as petitions or motions with the exhibits (pleadings are limited to 25 pgs. maximum)
- Proof of service of the above



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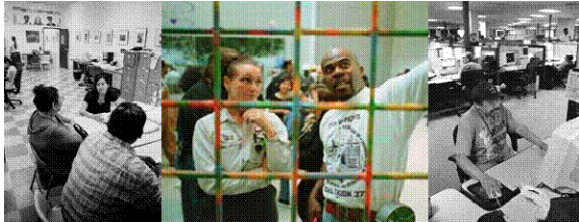


Division of Workers' Compensation

EAMS Electronic Adjudication Management System

CA Department of Industrial Relations

Q&A Panel: OCR Form Filing




Division of Workers' Compensation

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CA Department of Industrial Relations

E-form Trial Overview and CBT Review for e-Form Filers



E-Form Trial Overview

- Before ability to participate in the e-form trial:
 - Organization must complete and sign the e-forms trial application and agreement
 - Organization must complete the CBT and obtain the EAMS user certification after completing the testing with a score of at least 80%
 - Username / Logons will be assigned upon completion of the above
- ONE username / logon will be distributed PER entity location



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E-Form Trial Overview Contd.

- E-form trial to start on or after Sept. 4, 2008
- The e-forms trial is not an opportunity for offices to "try out" e-forms because it is not a test, it is real filing in real cases
- It's a voluntary commitment and a legal contract for the office to use exclusively e-forms during its participation
- Be excited about actually being "paperless" in your dealings with the DWC as you embrace the change



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Go to CBT



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CBT Review

- Many questions have arisen about filing OTHER pleadings
 - To do this in the e-form filing environment of EAMS we use the unstructured e-form
- No ability to “auto-populate” within the e-form filing environment
- In the e-form filing environment the cover sheet and document separator sheet are part of the DWC form



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CBT Review Contd.

- There is no ability to print the entire document in the e-form environment, so you must print each tab/page as you complete it
- There is no rejection NOTICE sent from EAMS, so the e-form filer should / can check the status of submitted documents within 24 hours of filing, after the “batch” has been uploaded into EAMS
 - Checking the INT case / product delivery unit



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Managing User Names and Logons

- Some thoughts about how an external user group may manage their ONE username / logon:
 - Central computer
 - Central pass
 - Small group of external users / administrators



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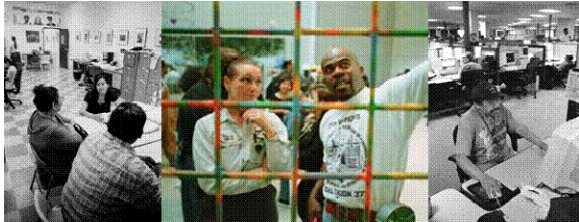


Division of Workers' Compensation

EAMS Electronic Adjudication Management System

CA Department of Industrial Relations

Q&A Panel: e-Form Trial and Filing




Division of Workers' Compensation

EAMS Electronic Adjudication Management System

CA Department of Industrial Relations

Temporary CD filing by External Users



Objectives

- Submission of CD
 - Folders
 - Documents
 - CD identifier sheet
- Legacy forms
 - Data transfer to e-form
 - Attachments
 - Batch submission
 - Confirmation



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Submission of CD

- CD
 - Senders name
 - Senders phone
 - Date (MM/DD/YYYY)
 - Folder names



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CD Format

- Contains no more than 5 file folders
- Each folder signifies document(s) for a specific case
 - Naming convention of folders
 - Existing case
 - Case type (examples: ADJ, DEU, RSU, etc.)
 - Case number (for existing cases)
 - Last name of injured worker
 - New case
 - Date of birth
 - Last name of injured worker
 - Date of Injury

Example: ADJ109203 Smith
ADJ293053 Jones
DEU1204932 Johnson
OAK9384528 Acosta

Example: 09291976 Walker 01192007



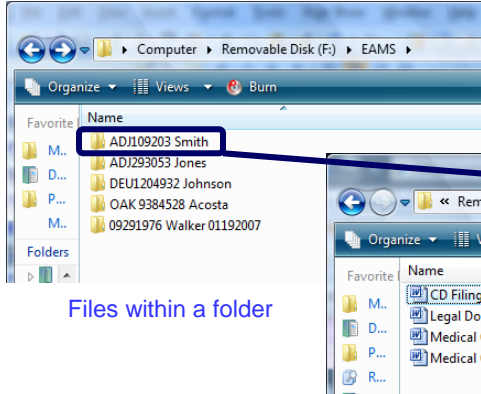
Documents

- Formatted in MS Word or PDF
- Naming convention of files
 - Document type
 - Examples of ADJ document type (other units will have different doc types):
 - Employer
 - Evidence
 - Legal
 - Lien or bills
 - Medical
 - Misc
 - Document title (see attached list)
 - Author (person who created the document)
 - Document date (MMDDYYYY)

Example: Legal DOR Robert Morton 06132008
Medical QME Report Dr. James Quincy 07182003
Medical QME Report Dr. James Quincy1008200317



Folders and Files



File folders in CD

Files within a folder

- First document is the CD filing batch identifier sheet
- Second document is the legacy form
- All other supporting documents



CD Filing Batch Identifier Sheet

A CD identifier sheet must be completed for each folder

Example: If 5 folders are on a CD, 5 CD identifier sheets would be attached

This fillable form can be typed-- otherwise print clearly

CD Filing Batch Identifier Sheet

Applicant other than Injured Worker Insurance Carrier Employer Lien Claimant

Your Name _____ Date Received _____
 Contact Number _____ ICB DWIC USE _____
 EAMS Case# _____ Date Entered into EAMS _____
 Legacy Case# _____ Batch ID# _____
 Injured Workers' Last Name, First Name _____ Initials _____
 Date of Injury _____ Confirm in FileNet _____

Companion Case Number

DOC TYPE *	DOC TITLE	AUTHOR (FIRST AND LAST)	DOC DATE (MM/DD/YYYY)

* Doc Type

ADJ	Employee	Employer	Legal	Law Bills	Medical	Misc
DBI	DBI Docs - Other	DBI Forms	Medical Report	Misc		
FEI	ADJ - Legal	Legal Docs	Misc			
ESI	Legal - Misc	Legal Docs	Misc			
LSB	Medical	Medical Reports	Legal	Law Bills	Medical Docs	Medical Report
VOIC	Hearing	Law Bills	Medical Docs	Misc	New Forms	Other Docs
	RTW /CDR Doc	VOIC/Misc Docs	Medical Docs			



CD Filing Batch Identifier Sheet Contd.

- Mandatory fields:
 - Application information
 - Employer information
- Optional fields:
 - Applicant attorney information
 - Insurance carrier information
 - Defense attorney information

CD Filing Batch Identifier Sheet

Applicant Information	
Applicant First Name	
Applicant Last Name	
Address	
City, State, Zip	
Applicant SSN	
Date of Injury	
Date of Birth	
Applicant Attorney (optional)	
Attorney Name	
Law Firm	
Address	
City, State, Zip	
Telephone	
Employer Information: Insured <input type="checkbox"/> Self-Insured <input type="checkbox"/> Legally Uninsured <input type="checkbox"/> Uninsured <input type="checkbox"/>	
Employer Name	
Address	
City, State, Zip	
Insurance Carrier (optional)	
Insurance Carrier Name	
Address	
City, State, Zip	
Defense Attorney (optional)	
Law Firm	
Address	
City, State, Zip	
Telephone	

* Disc-Type: Employee, Employer, Employee, Legal, Law/DBA, Medical, Misc
 DIS: DIS/Case - Other, EEO/Retire, Medical Report, Misc
 INT: AD Legal, Legal Docs, Medical Docs, Misc
 REP: Law/DBA, Non-Firm, Misc
 REP: Hearing, Investigation, Legal, Law/DBA, Medical Docs, Medical Report
 Misc
 Misc: Misc, Law/DBA, VCC/Retiree, Medical Docs, Misc, Non-Firm, Medical Report



Complete Info on CD Batch Filing Identifier Sheet

- Complete your
- Name
 - Contact number
 - Company name

and the injured worker's

- Case number
- Name
- Date of injury

Name	Jane Seymour
Contact Number	555-555-5555
Company Name	Law Office of Jane Seymour
EAMS Case#	ADJ 109203
Legacy Case#	
Injured Workers' Last Name, First Name	Smith, John
Date of Injury	02/04/2007

Use the legacy case number when the EAMS case number is unknown.



Completing Companion Case Information

- Documents can be received in companion cases, if any
- If EAMS case number is unknown, list the legacy case number

Companion Case Number

ADJ 832472		
LAO 0094832		
LAO 0098736		



Document Type and Title

Specified document types and document titles are required for submission to FileNet

DOC TYPE *	DOC TITLE	AUTHOR (FIRST AND LAST)	DOC DATE (MM/DD/YYYY)
Misc	CD Filing Batch Identifier Sheet	Jane Seymour	08/11/2008
Legal	DOR	Jane Seymour	08/11/2008
Medical	QME Report	Dr. Jimmy Jones	06/01/2008
Medical	QME Report	Dr. Jimmy Jones	07/18/2008

Document types are listed at the bottom of this form

* Doc Type	Employer	Evidence	Legal	Lien/Bills	Medical	Misc
ADJ	DEU Docs - Other	DEU Forms	Medical Report	Misc		
DEIS	ADJ Legal	Legal Docs	Medical Docs	Misc		
INTL	Lien/Bills	Non-Form	Misc			
RSU	Hearing	Investigation	Legal	Lien/Bills	Medical Docs	Medical Report
UEP	Misc					
VOC	Hearing	Lien/Bills	Medical Doc	Misc	Non-Form	Rehab Docs
	KCW SIBB Doc	VOC Rehab Doc				


Document titles are appended at the end of these instructions



Date Received

The date received box will be stamped on the date in which the CD and CD identifier sheet(s) are received by DWC

For DWC use

Date Received	
Date Entered into EAMS	
Batch ID#	
Initials	
Confirm in FileNet	



Legacy Forms

EAMS e-form

Legacy form (PDF format)

STATE OF CALIFORNIA
WORKERS' COMPENSATION APPEALS BOARD

Case No. 201009005

John Smith Applicant
vs.
AA Auto Defendants

DECLARATION OF READINESS TO PROCEED

NOTICE: This requires the proceedings requested by a Declaration of Readiness to proceed shall be filed and served within ten (10) days after service of the Declaration. (Title 10410)

The Employee or Applicant Defendant requests that this case be set for hearing at Oakland Los Angeles San Francisco and Declarant states under penalty of perjury that he or she is presently ready to proceed to hearing on the issues below and has made the following efforts to resolve these issues: _____

Declarant requests: Mandatory Settlement Conference Status Conference Rating MSC* Priority Conference (L.C. 101020)

At the present time the principal issues are:

Compensation Rate Rehabilitation
 Temporary Disability Self-Insured Treatment
 Permanent Disability Future Medical Treatment
 Other _____

Declarant relies on the report(s) of Doctor(s) _____ dated _____

When a legacy form and supporting documents are submitted, the DWC staff member will place the e-form on one screen and the legacy form on the other screen



Transfer of Data from Legacy form to e-form

The DWC employee will copy and paste the required fields from the legacy form into the e-form

STATE OF CALIFORNIA
DWC DISTRICT OFFICE
E-COVER SHEET

Companion Cases Exist
More than 15 Companion Cases
Date: (MM/DD/YYYY) 08/07/2008
Case Number*: ADJ109203
55566777
Paste
START DATE (if Specific Injury) 08/07/2008
END DATE (MM/DD/YYYY)
Cumulative Injury
Body Part 1* 200 NECK Body Part 2:
Body Part 3:
Other Body Parts:
Please check unit to be filed on (check only one box)*
 ADJ DEU SIF UEF VOC INT
Companion Cases
Add Attachments Submit

STATE OF CALIFORNIA
WORKERS' COMPENSATION APPEALS BOARD
John Smith vs. AA Auto
Applicant vs. Defendants
Case: ADJ109203
Copy
DECLARATION OF READINESS TO PROCEED
NOTICE: Any objection to the proceedings requested by a Declaration of Readiness to proceed shall be filed and served within ten (10) days after service of the Declaration. (Title 10416)
The Employee or Applicant Defendant Lien Claimant requests that this case be set for hearing at Oakland (Other)
and Declarant states under penalty of perjury that he or she is presently ready to proceed to hearing on the issues below and has made the following efforts to resolve these issues:
Declarant requests: Mandatory Settlement Conference Status Conference Rating MSC* Priority Conference (i.c. 10020)
At the present time the principal issues are:
 Compensation Rate Rehabilitation
 Temporary Disability Self-Insured Treatment
 Permanent Disability Future Medical Treatment
 Other

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Uploading Attachments

The attachments are added one by one using the document naming format for each attachment to create a separator sheet for each

https://eamsdm.dwc.ca.gov/7hdnContextName-%2Fdwcfirmsfj

Electronic Adjudication Management System

Document Type*: --select--
Document Title*: --select--
Document Date: (mm/dd/yyyy)
Author:
File Upload*: Browse...
Attachment

https://eamsdm.dwc.ca.gov/7hdnContextName-%2Fdwcfirmsfj

Electronic Adjudication Management System

Document Type*: LEGAL DOCS
Document Title*: DECLARATION OF READINESS TO PROCEED
Document Date: 08/07/2008 (mm/dd/yyyy)
Author: Jane Seymour
File Upload*: F:\EAMS\ADJ109203 Sr Browse...
Attachment Browse File

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Batch Submission



The batch is uploaded into FileNet and a batch ID number is returned

Submission of this eform through EAMS constitutes service upon any internal DWC unit.
Batch ID: 42673
Date: 08/07/2008 01:39:50

The next business day a DWC staff will confirm entry into FileNet



Confirmation of FileNet Entry

Title	Doc Title	Doc Type	Doc Status	Admitted	Admitted Prop ID	Proposed	Author	Operator Jd	EAMS Doc ID	Doc Date	Doc Entry Date	Received Date
Legal Doc Jane Seymour 06132008.doc	DECLARATION OF READINESS TO PROCEED	LEGAL DOCS	PUBLIC				Jane Seymour	use1199	19510	8/7/08 12:00 AM	8/7/08 1:44 PM	8/7/08 12:00 AM

- FileNet displays all document associated to a case at the unit level
- FileNet allows users to search for documents that were uploaded into EAMS

Documents submitted are processed in the overnight batch run and will be available for viewing the next business day



Division of Workers' Compensation

EAMS Electronic Adjudication Management System

CA Department of Industrial Relations

Q&A Panel: Temporary CD Filing




Division of Workers' Compensation

EAMS Electronic Adjudication Management System

CA Department of Industrial Relations

EAMS Help Desk



About the EAMS Help Desk

- DWC Call Center is designated as EAMS help desk for external users
- During Pilot: 7 employees assisting external users via telephone 1-888-771-3267 choose option #4 or e-mail EAMSHelpDesk@dir.ca.gov
- All Call Center staff (30 approx.) will be gradually be incorporated to assist external users



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EAMS Help Desk Procedures

- External users with issue contact EAMS help desk @ 1-888-771-3267 choose option #4 or e-mail EAMSHelpDesk@dir.ca.gov
- Call Center to research problem
 - Discuss issue with external user
 - Call Center will walk through problem with external user if necessary
 - If it is determined there is a problem that can't be resolved the issue will be elevated to "issue tracker"



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EAMS Help Desk Problem Solving

- What is issue tracker?
 - EAMS experts who investigate and resolve issues
 - Issue tracker ID# will be given to external user as a reference number to track status
 - Upon response from issue tracker, external user will be contacted and notified of outcome



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EAMS Help Desk Helpful Hints

- Take screen shots of error messages
- How? ALT + print screen then save into a Word document and attach to your e-mail for help desk to view & possibly submit to issue tracker
- Include name of case, case # and detailed description of problem when reporting issues to the help desk
- Provide all your information and best way to reach you
- Trust the process!



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Q&A Panel: Help Desk



EAMS Available Resources

- **Web site:** www.dwc.ca.gov/eams
 - ✓ Computer based training (CBT)
 - ✓ Demos
 - ✓ FAQs
 - ✓ How-to's
 - ✓ Newsletter
- **Email:** eams@dir.ca.gov
 - ✓ Put nature of what you're looking for, such as "test lab" or "e-forms trial" in subject line
- **External sources:**
 - ✓ Forms vendors
 - ✓ Statewide and local professional associations—CWCI, CAAA, State Bar, etc



What's Next?

- ✓ Make a decision about filing if you haven't already
- ✓ Take the necessary action to implement decision
- ✓ Read the regulations
- ✓ Train your staff
- ✓ Embrace the change

