eLink Online Services User Guide

for Employers

WCB Workers'
Compensation
Board
Alberta

Table of Contents

Welcome to eLink Online Services

Introduction

The Workers' Compensation Board – Alberta's eLink Online Services are a collection of internet tools that offer our clients a convenient and secure way of doing business with us. With access to Online Services, employers enjoy the efficiency, security and reliability of electronically submitting worker injury reports, obtaining claims cost summaries and pricing reports, and updating their WCB account information.

The suite of online services tools available to employers include:

- **The Electronic Injury Reporting System for Employers** – Eliminates problems associated with misplaced, incomplete or illegible faxes, resulting in faster and more accurate processing of worker claims and expedited claim decisions. The system now makes it easier for employers to submit their reports within the legislated 72 hours of the incident.

- **The Loss Control Reporting System** – Enables employers to electronically request and receive a variety of reports, ranging from monthly or yearly claims cost summaries to general statistic reports on their company or industry.

- **The Account Maintenance System** – Allows employers to make many of their most frequent updates to their account online, including changing mailing and contact information, updating operations and trade names, and revising worker estimates.

System Availability

Online Services are available from 6:00 am to 12:00 am (MST), seven days a week.

System Requirements

Online services are designed for PCs running Internet Explorer (version 6.0 or higher) and a high-speed internet connection. While it is possible to access our services using a dial-up modem, we strongly recommend using a high-speed connection such as DSL or cable modem.

Technical Support

The WCB recognizes that while online services are designed to provide added convenience and service to our employers, they can also present new challenges to many users. Should you require assistance using our online services, the eBusiness Support Team is available to answer any technical questions you may have. Contact the eBusiness Support Team using any of the methods below:

eBusiness Support Team

Phone: (780) 498-7688

Fax: (780) 498-7866

Email: ebusiness.support@wcb.ab.ca

The team is available from 8:00 am to 4:30 pm (MST) Monday through Friday.

Security

Each user requiring access to our online services will be issued a unique user ID and a temporary password. When a user ID is issued, it is imperative that IDs *not* be shared amongst users. In addition, when an individual leaves an organization or no longer requires access to our systems, their user ID must be deactivated. Doing so is the responsibility of the organization's **Delegated Administrator*** of Online Services. Organizations that do not have a Delegated Administrator must contact the eBusiness Support Team to advise us of all administrative changes.

Our online services are accessible only via a secure web channel using 128-bit Secure Socket Layer (SSL) encryption. Users can be assured that all information transferred through our online services is transmitted using the highest level of protection available today.

To further enhance security, the Electronic Injury Reporting system is governed by a 20 minute session time out rule. This means that, once the user has logged in, browsing activity within the system must be maintained *at least* once every 20 minutes, otherwise the web session will expire and any unsaved information will be lost. Browsing activity can be maintained simply by clicking on either a tab or a button. This feature was implemented to prevent unauthorized persons from accessing confidential information while the user is away from their computer for an extended time.

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* A Delegated Administrator is a role assigned to one member of each organization, and includes several features that allow organizations to manage their own users, including:
- Creating new users
- Modifying existing user information
- Resetting user passwords
- Setting user permissions or restrictions

For more information on the role and responsibilities of the Delegated Administrator, please refer to the **Delegated Administrator guide**, available upon request from the eBusiness Support Team.

Because the 20 minute time out counter *resets* each time the user changes tabs or clicks on a button, there is not a total time limit for using our online systems. It is still recommended, however, that the user save their changes each time before stepping away from their computer; that way, if they are called away for longer than expected, no information will be lost.

Getting Started

Obtaining access to eLink Online Services is a simple three-step process:

1. Become registered

Simply print out and fax in a **Request for Access** form found on the WCB webpage http://www.wcb.ab.ca/onlineservices/requestAccessEmployer.asp. After receiving the request, a member of the eBusiness Support Team will contact the registrant to provide their user ID and temporary password.

2. Create additional users for your organization

There are two ways to set up additional users within a company. First, if a user has requested Delegated Administrator privileges on their registration form, they will automatically be granted the authority to create new user IDs for anyone else in their organization. Alternatively, if Delegated Administrator privileges have not been requested, then individual users may fill out and fax in a registration form to eBusiness Support to request their own user ID.

3. Log in to the system

After receiving their user ID and password, users can immediately log in to use our services. To access Online Services applications:

    a) Navigate to the eBusiness Services login page at the web address https://ds.wcb.ab.ca/uidp/signon.

b) Enter the user ID and password provided by the eBusiness Support Team, then click on the **Sign On** button. Please note that the password is case sensitive.

Note: If this is the first time logging onto the system, the user will be required to change their password. The user will also need to select and answer two challenge questions. These questions are used to confirm their access when the "Forgot Your Password?"* option is used, available from the main logon screen.

Change Password

User ID: abc1234

|	
Current Password:	
New Password:	
Confirm Password:	
Challenge Question 1:	What is your favorite color?
Challenge Response 1:	
Challenge Question 2:	What is your favorite color?
Challenge Response 2:	

The password length must be at least 6 characters and cannot exceed 32 characters.

Submit   Reset

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*The "**Forgot Your Password?**" option can be used if you are unable to remember the password you chose when you first logged into the system. To utilize this service, enter your user ID, then click the "**Forgot Your Password?**" link. You will be allowed to change your password, provided that both challenge questions are answered correctly. Please note that challenge answers are also case sensitive.

c) Once logged in, the user will be directed to the eBusiness Services *Menu of Services*.
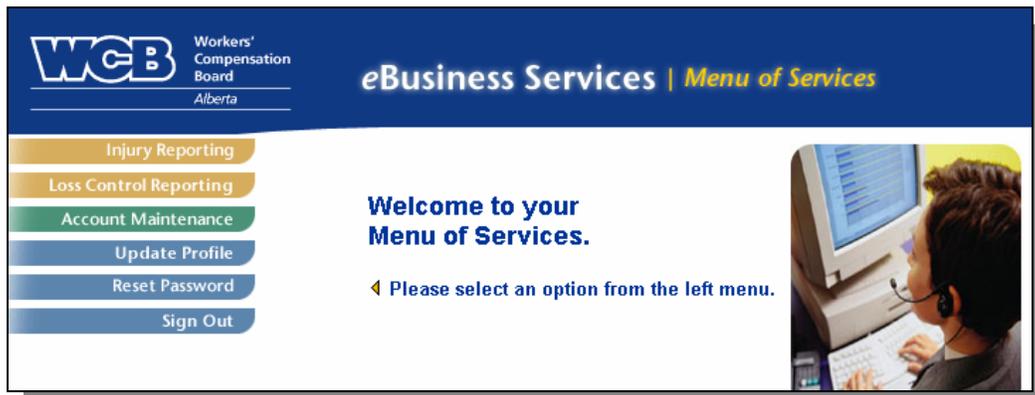
The *Menu of Services* provides the following options for a regular user.

1. **Injury Reporting** – Provides access to the Electronic Injury Reporting system.

2. **Loss Control Reporting** – Provides access to the Loss Control Reporting system.

3. **Account Maintenance** – Provides access to the Account Maintenance system.

4. **Update Profile** – Allows the user to correct or change their own user profile information, such as the user's name or email address.

5. **Reset Password** – Allows the user to change their password and/or challenge questions and answers.

6. **Sign Out** – To securely exit the system.

*Note: Delegated Administrators will also have one additional option labeled User Administration. The functions available in the User Administration option are outlined in the **Delegated Administrator Guide**. To receive a copy of the Delegated Administrator Guide, please contact the eBusiness Support Team.*

The Electronic Injury Reporting System

The Electronic Injury Reporting system provides a free, easy-to-use and convenient means for employers to submit injury reports to the WCB. Through this system, employers can electronically submit their **Employer's Report of Injury (C-040)**, the **Worker's Report of Injury (C-060)** and the **Earnings Addendum to the Employer's Report of Injury (C-040E)**.

The Electronic Injury Reporting system replaces the traditional faxing method for injury report submission.

There are several advantages to using the Electronic Injury Reporting system:

- **Flexible reporting options** – Multiple users can access the same reports from any location with an Internet-equipped computer.
- **Faster claims decisions** – Reports are in the hands of Adjudicators and Case Managers sooner to expedite claims decisions, which benefit both the injured worker and the employer by reducing claims costs. Your new information reaches WCB decision-makers within hours (instead of days) of submission.
- **Improved security** – All data transfer is private and secure, using 128-bit Secure Socket Layer (SSL) encryption. This is the same level of security your bank uses with their online banking applications.
- **Report Management** – The system can be used as a centralized storage medium, allowing users to store and organize claim reports.

To access the Electronic Injury Reporting System, simply click on the **Injury Reporting** option from the **eBusiness Services** – *Menu of Services*.

Navigating through the Electronic Injury Reporting System

This section will describe the screen layout of the Electronic Injury Reporting system. There are five areas of the screen as described below:

1. **Function tabs** – Provide access to different areas of the Electronic Injury Reporting system. Function tabs allow the user to **enter** a new **Employer's Report**, **create Worker Reports** and **C040 Earnings Addendum Reports**, and **Search** to retrieve both completed reports and reports that are still in progress.

2. **Report name** – Identifies the type of report currently being edited.

3. **Section tabs** – Used to toggle among the different sections of the report currently being edited.

4. **Save Changes & Submit For Processing buttons** – The **Save Changes** button saves all information entered in the report that is being edited. At this stage, no data validation or error checking is performed, and the report cannot be reviewed by WCB staff for adjudication purposes. The **Submit For Processing** button first checks all inputted data for completeness and correctness and, if no

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errors are found, will transmit the report to the WCB for claim adjudication.

5. **Help & Logout links** – The **Help** link opens a new browser window containing a comprehensive help document. The **Logout** link will allow the user to securely exit the Electronic Injury Reporting system and return them to the **eBusiness Services –** *Menu of Services* screen.

Working with Reports

The Employer's Report of Injury or Occupational Disease (C-040)

Upon entering the Electronic Injury Reporting system, the user is always automatically provided with a new, blank Employer's Report. The Electronic Reporting system requires this report to be submitted first for each injured worker, before any subsequent reports can be created. As per Workers' Compensation Act legislation, employers are required to submit this report to the WCB within 72 hours of being notified.

General Layout

The Employer's Report is divided into 7 different sections, as indicated by the corresponding tabs along the left side of the screen. By simply clicking from tab to tab, the user can navigate from one section of the report to the next. The sections of the report can be completed in any order; however, all seven sections of the report should be completed first before any attempt is made to submit the report. While it is not mandatory to **Save Changes** after every section (the user could, in theory, fill out all sections of the report, then click on **Save Changes** to save everything), it is highly

recommended that the user save *regularly* to avoid losing data due to timing out or lost internet connection issues.

Entering Data

Each section of the report contains a number of labeled question fields and a corresponding text box, pull-down menu, or set of radio buttons to provide the answer. Users familiar with the paper version of the reports will find the questions on the electronic version nearly identical. The only difference lies in the method by which they are answered.

Text boxes permit the user to enter and edit freehand information using a keyboard. Pull-down menus and radio buttons allow the user to select an answer from a simplified list of choices using a mouse. If the user does not find a specific answer they require in a pull-down menu, simply select the option that best matches the answer.

In text fields where specific formatting is required (for instance, date fields), the system will display the formatting style in the field label.

Note: Cutting and pasting text, tables, graphs, graphics, etc. directly from your word processor is not recommended. Advanced text editors such as **Microsoft Word** *often contain special characters that the Electronic Injury Reporting system cannot interpret. See the Frequently Asked Questions at the end of the document for more information about cutting and pasting text.*

For a detailed explanation of what a particular field is asking, or to find out if a specific field is mandatory to be answered, consult the online **Help** file. Because the Help file always opens in a new window, the user can continue working on their report even while the Help file is open (please ensure all pop-up blockers are disabled in order to use this feature). The Help file also contains useful suggestions and examples for properly filling out individual fields.

Saving and submitting

When the **Save Changes** button is clicked, *all* information that the user has entered in *every* section of the report will be saved remotely on our secure servers. No data is ever saved locally to the user's machine. Should the user's computer or network system crash or be compromised, no confidential information will be lost and all report data will remain safely accessible through any other machine having secure internet access. Keep in mind that when the **Save Changes** button is clicked, nothing is ever submitted for review by the WCB.

The fact that the report is saved to a central location also means that a report does not have to be completed all in one sitting. Users can start filling out portions of a report, save a draft copy, then continue working on it at a later time or date, even from a different machine (provided it has Internet access).

The first time a report is successfully saved, a **Transaction ID** will be automatically assigned to the report. The Transaction ID field can be found on Section 1 of the Employer's Report. The Transaction ID is a unique report identifier that is assigned to each and every report that is saved in the system. While most employers will not need to record or reference this number, the *eBusiness Support Team* may request this number when a user calls for assistance.

Once the user has completed all sections of the report and clicks on the **Submit for Processing** button, the following will occur:

1. All data in the report will be saved.
2. The system will check the report for errors – either fields that contain invalid data, or mandatory fields that have been left blank. See the next section for details on how errors are identified by the system, and how to make corrections.
3. If system does find errors, the user can make corrections and re-submit the report. If there are no errors, the user will receive the pop-up message, "Your report was successfully submitted." Please

note that the WCB does not examine the report until it has been successfully submitted.

The following chart summarizes the differences between reports that have been submitted and those that have only been saved:

Saved Reports	Submitted Reports
• Are not examined by the WCB. • Can be edited, printed and even deleted at your convenience.	• Become part of an official claim file. • Can be printed but not edited or deleted.

Correcting Errors

After clicking the **Submit for Processing** button, the report is automatically checked for accuracy and completeness before being transmitted to the WCB. If the system finds errors, the user will be notified in three ways:

1. Section tabs will be highlighted with red text if there are errors in that section.
2. Within each section, individual fields that contain errors will be highlighted with red text.
3. A description of **Section Errors** will be displayed at the top of each section.

To correct errors, click on any section tab where the tab text is highlighted in red. Within that section, look for individual field headings highlighted in red – these are the fields that need to be corrected. Use the **Section Error** descriptions at the top of the page to determine how to fix the error.

Some errors may appear more complex than others. The simplest errors arise from mandatory fields that have not been completed (most fields are always mandatory; however, some *become* mandatory, depending on what was answered in a previous question). For example, if the user indicates in the **Work Status** tab that modified duties have been offered to the worker, then a description of those modified duties offered must be provided in the next field (in contrast, if modified duties *were not* offered, then the description field must be left blank).

Other error messages may emerge due to invalid or illogical data entered. Examples of this include invalid postal codes or Social Insurance Numbers, or a date of injury that occurs before the date hired. To best identify the nature of the error, refer to the Section Error description(s) at the top of

each section. If the nature of the error is still not clear, contact the eBusiness Support Team for assistance.

Once all errors have been corrected, the system will allow the report to be submitted for processing. The user will receive a pop-up message stating "Your report was successfully submitted", indicating that the report has been successfully transmitted to the WCB.

Important note: Once a report has been submitted, the user is no longer able to make additions or modifications to the report. If there is any information that was mistakenly omitted or a correction needs to be made to the report, the user may submit this to the WCB by fax, phone or email. Please refer to the **Contact Us** *section below for this information*

The Worker's Report of Injury or Occupational Disease (C-060)

After the Employer's Report of Injury (C-040) has been submitted, the Electronic Injury Reporting system will allow the Worker's Report of Injury (C-060) to be also submitted electronically. Electronic submissions of the Worker's Report will replace the traditional faxing method, so there is no need to fax a copy of the report to the WCB.

There are two common methods by which electronic submission of the Worker's Report can be done:

1. Employers can have the worker fill out a paper copy of the Worker's report, then transpose the information onto the electronic version on behalf of the worker. Once the report is submitted, the employer can then print out a copy of the Worker's Report to provide to the worker.
2. Alternatively, the worker can enter their report directly into the electronic system themselves, at the permission of the employer. Be advised that the *employer* must be logged into the system when this is done, as the WCB does not issue user IDs and passwords to workers.

Note: Even if the employer has submitted the Employer's Report using the Electronic Injury Reporting system, it is not mandatory that the Worker's Report also be submitted electronically. If either of the above methods for electronic submission of the Worker's report does not work for your company, the worker can continue to fax in their report to the WCB.

Creating a Worker's Report of Injury

Prior to being allowed to create a Worker's Report, the Employer's Report (C-040) must have already been successfully submitted.

To create a **Worker's Report**:

1. Click on the **New Report from Existing** tab at the top of the screen.

2. Identify the worker for whom the Worker Report is to be created by filling in one or more search criteria fields.

   Note: Although the system provides the user with many options by which the worker may be identified, it is not necessary to fill in every search criteria field. In fact, the last name alone is usually sufficient to find the correct worker.

3. In the **Create Report As** pull-down menu, select the option **Worker's Report of Injury**.

4. Click on the **Search** button. The system will now search for, and return, a summary of any submitted Employer's Reports matching the search criteria entered.


5. From the ensuing list of results, locate the correct worker and click on the corresponding **Create New** link.
6. The system will create a new Worker's Report for the worker that has been automatically pre-populated with basic information taken from the initial report.

From here the process of completing the Worker Report is the same as completing an Employer's Report. Refer to the steps described in the previous section for entering data, saving and submitting the report and correcting errors.

The C-040 Earnings Addendum (C-040E)

The **C-040 Earnings Addendum** is used as a method for providing wage and work schedule information to the WCB for a worker who has lost time since the initial Employer's Report was submitted, so therefore, was previously considered as No Lost Time on the first report.

Creating a C-040 Earnings Addendum

Prior to being allowed to create a C-040 Earnings Addendum Report, the **Employer's Report (C-040)** must have been already successfully submitted in the system as a **No Lost Time** report.

To create a **C-040 Earnings Addendum**:
1. Click on the **New Report from Existing** tab at the top of the screen.

2. Identify the worker for whom the Earnings Addendum Report is to be created by filling in one or more search criteria fields.

   Note: Although the system provides the user with many options by which the worker may be identified, it is not necessary to fill in every search criteria field. In fact, the last name alone is usually sufficient to find the correct worker.

3. In the **Create Report As** pull-down menu, select the option **C040 Earnings Addendum**.

4. Click on the **Search** button. The system will first search for, and then return, a summary of any submitted Employer's Reports matching the search criteria entered.

5. From the ensuing list of results, locate the correct worker and click on the corresponding **Create New** link. If the report that was previously

submitted for the worker already identified the report as a Time Lost, the user will receive the following error message:
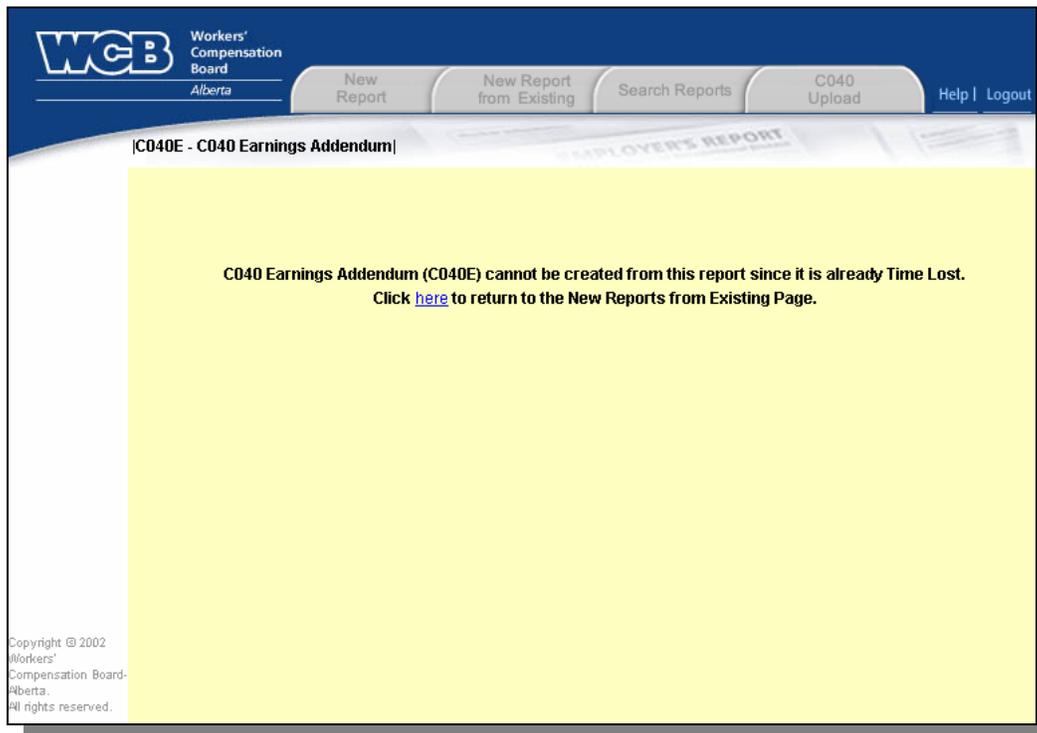
6. Otherwise, the system will create a new C-040 Earnings Addendum Report that has been automatically pre-populated with basic information taken from the initial report.

The C-040 Earnings Addendum Report consists of five Section tabs, with the fields in the Worker tab pre-populated with the worker's data taken from the original Employer's Report. Note that the pre-populated data on the new report cannot be edited or deleted. Begin filling out the report starting with the **Work Status** tab. Once all sections have been filled out, click on the **Submit For Processing** button to submit your report.

Retrieving and Printing Reports

Saved Reports

Once a report has been saved in the Electronic Reporting system, the user can retrieve the report at a later time or date to continue modifying it. Because the reports are saved remotely on the WCB's servers, the user can access the saved report from *any* machine having Internet access. To retrieve a previously saved report:

1. Log on to the Electronic Injury Reporting System.
2. Click on the **Search Reports** tab at the top of the screen.

3. Identify the worker to whom the report belongs by filling in one or more search criteria fields. The user may also optionally select a method by which the search results will be sorted ('Last Name' is selected by default).

   Note: Although the system provides the user with many options by which the worker may be identified, it is not necessary to fill in every search criteria field. In fact, the last name alone is usually sufficient to find the correct worker.

4. Click on the **Search** button. The system will first search for, and then return, a summary of all reports matching the search criteria entered.

5. From the ensuing list of results, locate the exact report required to be modified by examining the information provided in each report summary. Note that any reports with a **Report Status** of 'Incomplete' means that the report has not yet been submitted to the WCB. Such reports will be accompanied by both an **Open** link and a **Delete** link. *Note: Employer's Reports and Earnings Addendum Reports with a report status of 'Incomplete' will also have a third option to **View & Print** the report.*

6. To resume modifying the report, click on the **Open** link. The report will be re-opened for modification, containing all information that was previously entered and saved.

7. To permanently remove the incomplete report from the system, click on the **Delete** link. Before deleting the report, the system will ask the user to confirm their choice to delete the report.
Note: Doing this will permanently delete the report from the system. The user will no longer be able to access or retrieve the report.

8. To print a hardcopy of the report, click on the **View & Print** link. A PDF (Portable Document Format) copy of the report will open in a new window using Adobe Reader®. The user can print a copy of the report from here. Note that all incomplete reports that are viewed or printed will contain a "**Draft**" watermark, indicating that the report has not yet been submitted. Once the report has been submitted and reprinted, the "**Draft**" watermark will disappear.

Submitted Reports

Once a report has been submitted to the WCB through the Electronic Injury Reporting System, the system will immediately and automatically attempt to match the report to an existing claim on file. If the system finds a matching claim, it will assign the claim number to the report, which can be retrieved by the user (usually within one hour after submission). Reports that have been submitted may no longer be modified or deleted; however, they are still retrievable through the system for the purpose of viewing or printing.

To retrieve a submitted report, the user must first search for the report. Since submitted reports are saved remotely on the WCB's servers, they may be accessed from any computer with Internet access. To retrieve a submitted report:

1. Log on to the Electronic Injury Reporting System.
2. Click on the **Search Reports** tab at the top of the screen.

3. Identify the worker to whom the report belongs by filling in one or more search criteria fields. The user may also optionally select a method by which the search results will be sorted ('Last Name' is selected by default).

   Note: Although the system provides the user with many options by which the worker may be identified, it is not necessary to fill in every search criteria field. In fact, the last name alone is usually sufficient to find the correct worker.

4. Click on the **Search** button. The system will now search for and return a summary of all reports matching the search criteria entered.

5. From the ensuing list of results, locate the report required to be viewed and/or printed by examining the information provided in each report summary.

Submitted reports are any reports which display a **Report Status** *other than* "Incomplete". Specifically, submitted reports will have one of the following four potential report statuses:

1. **Submitted** – The report has been successfully submitted to the WCB, but it has not yet been processed by the Electronic Reporting System.

2. **Complete** – The report has been successfully submitted to the WCB, has been processed by the Electronic Reporting System, and a claim number has been assigned to the report. The user will find the assigned claim number in the **Processed Claim** field when viewing the report summary details on the Search screen.

3. **Held for Manual Processing** – The report has been submitted to the WCB; however, the system is unable to successfully match the report to an existing claim on file. The user will find an accompanying **Reason** for any reports that are held for manual processing. The

most common cause for reports having this status is due to a discrepancy in the data provided in the report, and what has been reported in prior report submissions by the worker, employer or physician. Because the report is unable to be automatically processed by the system, it must now be manually processed and matched to a claim by a Customer Records Clerk.

4. **Manual Processing Complete** – The report has been submitted to the WCB and was held for manual processing, but the Customer Records Clerk has finished processing the report and a claim number has been assigned. The user will find the assigned claim number in the **Processed Claim** field when viewing the report summary details on the Search screen.

All reports that have been submitted and/or processed will be accompanied by a link to **View & Print** the report. In addition, reports that have already been processed (where the report status is either "Complete" or "Manual Processing Complete") will have a second option to **Move to History**.

To print a hardcopy of the report, click on the **View & Print** link. A PDF (Portable Document Format) copy of the report will open in a new window using Adobe Reader®. The user can print a copy of the report from here.

The **Move to History** link provides the user with an option to archive old reports. This action does not *delete* the report from the system, but rather, moves the report from "active" view to "historical" view. One search criterion available on the Search Reports screen is the option to select between "Active" and "Historical" reports. If the user selects "Active", the system will omit displaying any reports that have been moved to history. In contrast, if the user selects "Historical", the system will display only reports that have been moved to history.

Important note: Once a report has been moved to history (historical view), it can no longer be moved back to active view. Please exercise caution when clicking on this link. Should a report be archived in error, the report can still be retrieved by selecting "Historical" from the Search Criteria.

The C040 Upload Tab

The C040 upload interface provides a method to import electronic information into the Employer's Report of Injury form (C040). By reading information directly from a human resource or injury management system, time is saved and data entry errors are avoided. For information on requirements to use the C040 upload interface, please refer to the technical schema found on the WCB website at http://www.wcb.ab.ca/misc/eir.zip.

Using this system, a selected XML file is imported using the screen shown below. The amount of information populated into the Employer's Report of Injury from another system can be varied to suit the user. Any information that is not imported can be typed directly into the Electronic Injury Reporting system.

To import an XML file into the system, simply click on the **Browse** button, then navigate to the file to be uploaded. After the file has been located, click on the **Submit** button to upload the file. If the system finds any problems with the file the user is attempting to upload, it will display an error message similar to the one below:

If there are no errors in the file, the system will automatically create a new Employer's Report (C-040) containing pre-populated data taken from the XML file. The user can then complete the report by entering any missing information, then submit the report to the WCB in the usual manner.

The Loss Control Reporting System

The Loss Control Reporting system is a self-service online program that allows employers, certifying partners and safety associations to electronically request and receive claim cost history and pricing program reports for companies and industries. To access the Loss Control Reporting system, simply click on the **Loss Control Reporting** option from the **eBusiness Services – *Menu of Services***.

Navigating through the Loss Control Reporting System

Within the Loss Control Reporting application, there are three tabs located horizontally along the top of the screen. Each tab enables the user to perform different functions within the application. In addition, there are two links located in the upper-right corner of the page that allow the user to request assistance in using the application.

Request Reports Tab

The options available through the *Request Reports* tab allow the user to either request reports on a one-time basis, or to subscribe to reports to be sent at regular intervals. Within this tab, the user will find a custom list of available reports that can be requested or subscribed to.

There are currently three reports to which a user can subscribe:

Report	Interval
Claims Summary - Monthly	Monthly
Claims Summary - Yearly	Monthly or Quarterly
Claims Reporting Performance - Timeliness	Quarterly

The other reports are generated as a one-time request *only*.

To request a report, simply click on the name of the report you wish to request or subscribe to. There may be as many as 15 different reports to choose from; however, not all users will be able to access all reports, as some reports are user-specific. A user's selection of available reports is based on the accounts that they were granted access to when registering.

Requesting a report is a simple three-step process:

1. **Select** the account: At the top of the next screen, the user will find a list of the available account/industry combinations they have access to. Click on the check box beside the account/industry code or codes you wish to request the reports for. More than one account/industry code combinations may be selected.

Select Accounts	Open or Closed	Account Number	Industry Code	Company Legal Name	Company Trade Name
☐	O	1234567	11111	ABC COMPANY INC.	
☑	O	1234567	22222	ABC COMPANY INC.	

Check All   Clear All   Add Selected

2. **Promote** the selection: Click on the **Add Selected** button to copy the selection(s) to the orange **Requested** area. Verify that the correct account/industry code combination(s) required are listed in the **Requested** area. To remove an account/industry code combination from the list of requested reports, simply select the check box under the **Remove Accounts** column, then click on the **Remove Selected** button.

Verify Reports Requested:

Remove Accounts	Open or Closed	Account Number	Industry Code	Company Legal Name	Company Trade Name
☐	O	1234567	22222	ABC COMPANY INC.	

Check All **Clear All**   **Remove Selected**

3. **Submit** your request for the report: Complete relevant parameters such as report dates and delivery options, then click on the **Submit Request** button. Use the **Cancel** button to return to the main screen without submitting the request.

Year/Month (yyyy / mm)   2006/05

Delivery Options

☑ Submit Immediately   Output Type Portable Document Format ▾   **Submit Request**

☑ Subscribe on a Monthly ▾ basis. Comment _____   **Cancel**

*Note: The **Comment** field allows the user to attach a notation that will help identify a particular run of a report when it is generated. Please be advised, however, that if requesting multiple reports, every report will be given the exact same comment. In addition, please note that comments are not editable once they have been assigned to the report. The only way to change a comment will be to first delete the report (or subscription), then re-request it with the correct comment.*

Upon submitting the request, the user will receive a pop-up confirmation indicating that the request has been received. As soon as the report is generated, an email notification will be sent to the user advising that the requested report is available to be viewed.

Retrieve Reports Tab

The Retrieve Reports tab provides a list of reports that have been requested by the user or automatically generated (in the case of PIR reports) by the **Loss Control Reporting** system.

To view the details of a report, simply click on the report name below the **Type** heading. The report will open in a new window where it can then be saved to the user's hard drive in PDF format for future reference, or printed if a hard copy is required.

A few notes regarding the retrieval of reports:

1. The email address to which the notification message is sent is the address provided on the **Request for Access** form when the ID was created. The email notification message is sent *only* to this email address. Should the user need to share the report with another member of their organization, they may either print, or save and email an electronic copy of the report (in PDF format).

2. The list of reports found in the **Retrieve Reports** tab can be sorted by any one of the column headings, simply by clicking on the column heading the user wishes to sort by (e.g. Account #, Industry #, etc.).

3. The Removal Date represents the date when the report will be automatically deleted from the Retrieve Reports box. Each report has a maximum archive date of 80 days (except for the 7 page General Statistics Reports, which is 120 days), so that the retrieve box does not get too cluttered. Old or unused reports can also be *manually* deleted before the Removal Date by the user, simply by checking the applicable box under the 'Delete' column, and then clicking the **Delete Selected** button.

4. If there is a large selection of reports listed in the Retrieve Reports screen, use the **Search List** feature to find a specific report, or to at least narrow down the selection of choices.

Manage Subscriptions Tab

The Manage Subscriptions tab allows the user to organize their subscriptions. At a glance, the screen will list every subscription that has been requested. In addition to each report name (Type), the screen will also list both the account and the industry numbers, the time interval for the report (How Often), when the next offering will be available (Next Posted Date), the format in which the report will be created (Output Type), and the description that was entered when the subscription was first created (Comment).

Each of these columns is sort-able. Simply clicking the top of each column will rearrange the order. Each sort toggles in an alternating ascending/descending fashion.

Type	Account#	Industry#	How Often	Next Posted Date	Output Type	Comment	Delete
Claims Summary – Monthly	1234567	30100	Monthly	2006/08/08	PDF		☐
Claims Summary – Yearly	1234567	99100	Monthly	2006/08/08	PDF		☐

Additional information about the subscription process can be found by clicking on the 'Help' link, located at the top-right hand corner of the screen.

A few notes regarding subscriptions:

1. If you no longer need to receive a report on a regular basis, *delete* the subscription by checking the delete box (on the right-hand side of the display) and clicking the orange **Delete Selected** button.
2. The 'Next Posted Date' indicates the date the next report will be created.
3. Users can sort the list of subscriptions found in this tab by clicking on the applicable column heading they wish to sort by.
4. This screen displays a list of *subscriptions*, not the actual reports themselves. To find the pertinent report, go to the 'Retrieve Reports' tab.

The Reports

Claims Summary – Monthly

The **Monthly Claims Summary** report provides a monthly account of costs and services provided on workers' claims. The report is available through either a monthly subscription or a one-time (ad-hoc) request basis. Users may request reports as far back as 6 months from the current date (not including the current month).

Claims Summary – Yearly

The **Yearly Claims Summary** report provides an account of costs and services provided on workers' claims for specific years. The report is available through either a monthly or quarterly subscription or an ad-hoc basis. The report will provide past claims data up to 10 years from the current date (not including the current year).

Claims Reporting Performance – Details

The **Claims Reporting Performance – Details** report provides data on timeliness of all claims reports (both Lost Time and No Lost Time claims) submitted by an employer to the WCB. The report provides two indications for reporting performance: one for days to report from the date of accident and another for days to report from date reported to employer.

Claims Reporting Performance – Timeliness

The **Claims Reporting Performance – Timeliness** report is a quarterly report that provides data on timeliness of lost time claims (LTC) reports for a specific account/industry operation. At a glance, the report will indicate how many employer reports were submitted within 0-3 days, 4-5 days, 6-10 days, or 10+ days. Reports submitted within the 0-3 or 4-5 day ranges are deemed to be ON-TIME, and are shown as a percentage of all LTC reports submitted. This report is available through either a quarterly subscription or an ad-hoc basis. Users may request data as far back as eight quarters from the current date.

General Statistics Reports

There are 7 variations of this report:

1. *Company* – Provides claims, financial and qualitative history for a company and its corresponding industry. This report is available only to large employer accounts.

2. *Industry* – Provides claims, financial and qualitative history for a particular industry.

3. *Certifying Partner Members* – Provides claims, financial and qualitative history for all companies associated with a particular Certifying Partner. The user will be required to choose from a list of (currently) 16 Certifying Partners.

4. *Funded Safety Association Members* – Provides claims, financial and qualitative history for all companies associated with a particular Safety Association. The user will be required to choose from a list of (currently) 7 fully-funded Safety Associations.

5. *Established Group of Accounts* – Provides claims, financial and qualitative history for all companies associated with a particular Non-Funded Safety Association. The user will be required to choose from a list of (currently) six Non-Funded Safety Associations.

6. *Established Group of Industries* – Provides claims, financial and qualitative history for the Petroleum Safety Council.

7. *All Industries* – Provides claims, financial and qualitative history for all industries in Alberta.

Performance Based Pricing – Impact of Injuries

The **Impact of Injuries** report provides a range of claim cost scenarios and the corresponding rate/premium for those claim costs for a particular company, industry and rate year. This report is available only to large employer accounts.

Performance Based Pricing – Premium Analysis

The **Premium Analysis** report provides a detailed breakdown of how a company's premium is calculated, showing how all pricing program adjustments and rebates/refunds are applied to the account for each of the past five revenue years.

The Account Maintenance System

Using our Account Maintenance application, employers can make many of their most frequent updates to their WCB account online: revise worker estimates, maintain personal coverage, update operations and trade names, change mailing and contact information, or close their account*. To access the Account Maintenance system, simply click on the **Account Maintenance** option from the **eBusiness Services – *Menu of Services***.

Navigating through the Account Maintenance System

The Account Maintenance application provides five tabs listed vertically along the left side of the screen for navigation. Simply click on the tab to jump directly to the area of information required to be modified.

Fields marked with a red asterisk (*) are mandatory fields, and must contain information when the changes are submitted.

*The Account Maintenance system cannot be used to reopen a closed account. To do this, use our online **Account Registration** system.

Addresses

This tab allows users to modify their company's legal name or billing address, or add, modify or delete one or more location addresses.

- If the company name has changed, answering 'Yes' to the first question will prompt the user to provide additional information regarding the name change.
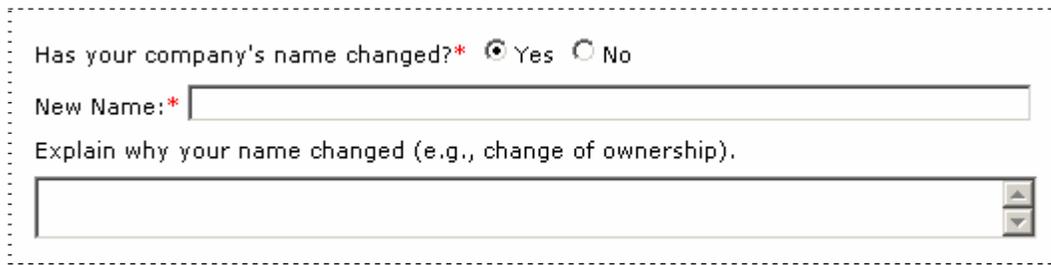
> Has your company's name changed?* ⊙ Yes ○ No
>
> New Name:* [   ]
>
> Explain why your name changed (e.g., change of ownership).
>
> [   ]

- Changes to the **Billing Address** can be made by simply typing over the existing information.
- To add a location address, click on the **Add Location Address** button, then fill in the required information. Click the **OK** button to accept your changes, or the **Cancel** button to abandon your changes.
- To make changes to an existing location address, click the **Edit** icon (📝) to the right of the address line. To delete an existing location address, click the **Delete** icon (✗).

Contact

Maintain the names, phone numbers and email addresses of an organization's staff or representatives who interact with the WCB.

- To add a new contact, click the **Add Contact** button, then fill in the required information. Click the **OK** button to accept your changes, or the **Cancel** button to abandon your changes.
- To make changes to an existing contact, click the **Edit** icon (📝) to the right of the contact. To delete an existing contact, click the **Delete** icon (✗).

Operations

The **Operations** Tab allows users to notify the WCB of changes to company operations, or to add, modify or delete one or more trade names.

- To request a change to your company operations classification, answer **No** to the question "Does the above describe the operation(s) you are engaged in?", then type in the details for your request.
- Click on the **Edit** icon ( ) beside the Operations Industry Code and Title to make changes to the company's trade name. Click on the red checkmark ( ) to accept your changes, or the cancel icon ( ) to abandon your changes.

Worker Earnings

The **Worker Earnings** tab allows users to update their estimate of worker insurable earnings for the current year.*

- To change the company's insurable earnings estimate for the current year, click on the **Edit** icon ( ) to the right of the current estimate. Enter the revised estimate, then click the red checkmark ( ) to accept your changes. To abandon your changes, click the cancel icon ( ).

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*Companies that do not currently have worker coverage must contact the WCB to activate this coverage. Please call the Customer Contact Centre in Edmonton at (780) 498-3999, or toll-free within Alberta 1-866-922-9221 if you require worker coverage. Worker coverage cannot be initiated through the Account Maintenance system.

Personal Coverage

The **Personal Coverage** tab can be used to add, terminate or modify coverage amounts for directors, partners and owners.

- To add a new personal coverage holder, click the **Add Personal Coverage Holder** button, then fill in the required information. Click the red checkmark (✓) to accept your changes, or the cancel icon (🚫) to abandon your changes.
- To change the personal coverage amount or to terminate coverage for an existing coverage holder, click the **Edit** icon (📝) to the right of the personal coverage holder. Click the red checkmark (✓) to accept your changes, or the cancel icon (🚫) to abandon your changes.

Close Account

If your business has been sold or is no longer operating you must provide the WCB with information related to this change. It may be necessary to close your account, even if your business is continuing under a new owner. You need not report a sale of shares if the business continues in its current form. To close your account, simply fill out the required fields in this tab.

- To enter dates, either use your keyboard to manually enter in the dates in the proper date format, or select the calendar icon (📅) to access an online calendar.
- Choose the applicable Province or State from the pull-down list.
- All other information can be entered manually using your keyboard.

Submitting Changes to the WCB

To send your information to the WCB, click the **Submit** button in the lower right corner. All changes made during your session will be sent to the WCB. You will be shown a summary page of your changes sent to the WCB, along with a confirmation number. Please retain your confirmation number for future reference, or print a hard copy of the summary screen by selecting the **Print** link in the top right corner.

Additional Help

Frequently Asked Questions

1. **I can't log in!**

   Here are a few things to keep in mind when trying to log in:

   - Ensure that you are at the correct site. The address at the top of the login screen should read:

     https://ds.wcb.ab.ca/uidp/signon/content/logon.aspx

   - Ensure your user ID is correct. Your user ID is comprised of three letters followed by four numbers. If you have forgotten your user ID, please contact your Delegated Administrator, who will be able to retrieve it for you.

   - Ensure your password is correct. The password is case-sensitive. If you have forgotten your password, enter your username on the login page, and then click the "Forgot Your Password?" link. The system will prompt you to answer the two challenge questions you selected when you logged in the first time, and, at the same time, allow you to enter a new password.

   If further assistance is required with logging in, contact your Delegated Administrator (or the eBusiness Support Team if you do not have one).

2. Common Electronic Injury Reporting Questions

a. How do I attach additional information to the report?

The Electronic Injury Reporting system does not allow for attachments to be submitted with the Employer's or Worker's Report of Injury. Any additional information the user wishes to submit independently of their report must be faxed, phoned, emailed or mailed to:

WCB – Alberta
9912-107 Street
P.O. Box 2415
Edmonton, AB T5J 2S5

Telephone: (780) 498-3999
Toll-free: 1-866-922-9221
Fax: (780) 498-7999
Email: ebusiness.support@wcb.ab.ca

b. I am unable to find a report using the search feature.

There are several reasons why a user may not be able to successfully retrieve a report for a worker. The most common reason is simply due to incorrect information that has been entered in the search criteria. Another common reason is that too many search criteria fields are entered (the search is too specific). In most cases, the report(s) can be found by searching using only the worker's last name. If this produces too many search results, the search can be further narrowed by using one additional search criterion along with the last name.

If the user is still unable to find the report, contact the eBusiness Support Team before re-creating the report. The eBusiness Support Team will be able to verify whether or not the report truly exists.

c. **When or why should a report be "Moved to History"?**

The **Move to History** feature helps users to manage and organize their reports by allowing them to archive inactive patient reports. By moving dated reports to history, the user will be able to focus only on their active claims. If the user is required to retrieve a report that has already been moved to history, they may simply select the "Historical" search option on the **Search Reports** screen.

d. **Can I cut and paste text directly from my word processor?**

Most advanced word processor tools (such as Microsoft Word or Lotus WordPro) contain special characters that are incompatible with the Electronic Injury Reporting system. It is strongly advised that users not cut and paste directly from such documents. If you do need to copy information from these types of files, there is an effective workaround to do this:

1. Highlight and copy the information from your word processor.
2. Paste the information into a simple text editing program such as Windows Notepad. Doing this will remove any special characters.
3. Highlight and copy the information again, this time from the Windows Notepad program.
4. Paste the information into the Electronic Injury Reporting system.

3. **Common Loss Control Reporting Questions**

   a. **What output formats are available for reports?**

      All reports are available in **Portable Document Format (PDF)**. To view such types of reports, Adobe Reader software (version 6.0 or higher) is required. A few select reports can also be requested in other formats. The <u>Claims Summary – Yearly</u> and <u>Claims Reporting Performance – Details</u> reports can be requested in either **PDF** or **Comma Separated Values (CSV)** format. The <u>Claims Summary – Monthly</u> report alone is available in **PDF**, **CSV** or **text** format.

   b. **How do I request Partners in Injury Reduction (PIR) reports?**

      Participants in the PIR program who have access to LCR do not need to request PIR reports. The reports will be automatically generated on a monthly basis with an email notification sent to the user each time the report is generated.

   c. **How long does it usually take to receive the report after I request it?**

      The time it takes to receive a report after the request is made depends on both the type of report you are requesting, and the time of day the report is requested. Normally, reports will be generated within 30 minutes of your request; however, if it is a particularly large report, or if it is requested during a period of high demand, it may take a few hours before the report is created.

   d. **Who do I contact if I have questions related to the data contained in my report?**

      Please address any questions pertaining to the specific details of a report to your Account Manager. If you have any questions or problems regarding the Loss Control Reporting system, please contact the eBusiness Support Team.

4. **Common Account Maintenance Questions**

   a. **How do I close my account if I only have Personal Coverage and I don't have any workers?**

      On the Personal Coverage tab select the edit button and click the termination box. You must then confirm your changes by selecting the check mark and then the submit button.

   b. **I have made a change on the Personal Coverage tab but I am unable to submit because my submit button is not highlighted.**

      You must confirm your changes by selecting the check mark and then you will be able to select the submit button.

   c. **I have questions.**

      Refer to the help file first, and if you are unable to find the answer, contact the eBusiness Support Team.

Contact Us

If this guide or the online help file does not answer your questions, then the eBusiness Support Team is available for assistance. Contact us using any of the methods listed below:

eBusiness Support Team

Phone: (780) 498-7688

Fax: (780) 498-7866

Email: ebusiness.support@wcb.ab.ca

The eBusiness Support Team is available from 8:00am to 4:30pm Monday through Friday.