

**A Getting Started
Guide for Using the
WCB Online
Clearance Request
System**



Using the WCB Online Clearance Request System

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Helpful Tips

This guide should help you walk through the step-by-step process of the Online Clearance Request System. Should you still have any questions, please check the Getting Help section of this guide.

Do not use the browser **Back** arrow button in your Internet window. Only use the menu links in the Clearances windows. The browser **Back** button will take you out of the Clearances System.

Using the WCB Online Clearance Request System

Overview

The Online Clearance Request System is a secure Internet application that will allow you to search potential sub-contractors and request authorized clearance status documents.* If you become a registered user, you can also use this tool to compile and store lists of the sub-contractors you use most often and be updated on their clearance status via e-mail. This system is one of many services deployed on the web by WCB and is part of an initiative to provide faster and better service to our clients. This guide will introduce you to the Online Clearance Request System and provide the information you need to get started.

System Requirements of the Online Clearance Request System

The system requirements for WCB's Online Clearance Request System include:

- Microsoft Internet Explorer 4.0 (5.0 + recommended) (128-bit encryption version)
- JavaScript enabled on your web browser
- Cookies enabled on your web browser**
- Internet Account
- 800 x 600 display resolution, 1024 X 768 display resolution recommended

If your computer system does not meet any of the above requirements, a screen is displayed when you log on informing you of the minimum criteria and a list of messages that describe what part of your system does not meet the requirements.

While there is no minimum Internet connection speed required, faster connection speeds will provide better performance.

When you can use the Online Clearance Request System

WCB's Online Clearance Request System and technical support is available to you 24 hours a day, seven days a week.***

* Each Clearance letter has a unique reference number to validate its authenticity.

** The Online Clearance Request System only uses session cookies. No application information is stored on your hard drive without your consent.

*** This availability level is subject to change.

Helpful Tips

The Online Clearance Request System checks your web browser and will inform you if your browser does not meet the minimum requirements.

Using the WCB Online Clearance Request System

Following WCB's Security Policy

The Online Clearance Request System provides access to public information only – confidential information is not accessible via this application. However, we have implemented a Web Security Policy as part of our commitment to our clients. In this section, you'll find the highlights of this policy and what this means to you. The Online Clearance Request System and associated data reside on a WCB Manitoba web server. While any Internet user can search and request clearance status documents, only users who have signed up with the WCB and have received a unique User ID have access to the save lists and receive update notifications. In addition, only authorized users – specified by you – can view your organization's information.

For further security, the WCB Technical Support Team will develop a challenge response mechanism when you register. If you ever forget your password or need to confirm your authorization, you will be able to use a unique phrase to identify yourself.

Security precautions are also taken when you register to use the Online Clearance Request System. Please refer to the "Getting Started" section of this guide.

To protect the confidentiality of your Clearance Requests, please observe the following rules:

- The Online Clearance Request System will ask you to change your password every 12 months. However, you can change your password at any time and are encouraged to change your password frequently.
- Use unusual passwords. Never use familiar names such as the names of your children or the name of your company as passwords.
- Three successive password violations during log on will lock your User ID. If this happens, you will need to contact the **WCB Technical Support Team** at **954-4803** in Winnipeg or toll free at **1-866-751-9245**.
- Never share your User ID or password.
- If you have a staff member who changes positions or e-mail addresses, or leaves your company and you no longer want them to have access to your Clearance Requests, please contact the **WCB Technical Support Team** at **954-4803** in Winnipeg or toll free at **1-866-751-9245** to update or remove the employee's User ID.

For security purposes, registered users will be required to read and agree to WCB's Web Access Agreement before accessing the Online Clearance Request System for the first time. If you are a registered user, you will also be required to read and agree to this document every 12 months or if there are any changes to the agreement. This agreement is similar to documents for other interactive web sites and web-based applications. It lists the terms of use and liability issues. It is highly recommended that you read the agreement carefully. You can print this document for your records if you wish.

Helpful Tips

Never share your
User ID or password!

Using the WCB Online Clearance Request System

Getting Started

There are two levels of access for the Online Clearance Request System:

- General public access
- Registered user access

General Public Access

Any Internet user may use the “search and print” functions of the Online Clearance Request System by browsing to the WCB website (www.wcb.mb.ca) and clicking on Online Clearances System under Online Services. Please refer to the Searching in Clearances section on page 6. However, if you will be using the system frequently, you will likely want registered user access.

Registered User Access

The first step to gaining “save list” and “update notification” access to the Online Clearance Request System is to become a registered user. For security purposes, there must be only one person in your organization who registers all of the users within your organization. This person will become the Security Administrator for your organization.

When the Security Administrator phones the WCB Technical Support Team to register your organization’s users, they will need the name and phone number of all the users they wish to register and a challenge-response phrase. (For more detailed information about challenge-response phrases, please refer to the “Following WCB’s Security Policy” section of this guide.) The Security Administrator will also need to provide a valid e-mail address.

If your firm is a registered employer with the WCB and you want to register for access to other WCB Online Services as you register for Clearances, you will also be asked for:

- the last reported Annual Estimated Earnings, or the last reported Quarterly Earnings
- your WCB Firm Number and
- the WCB Industry Code and corresponding rate.

To register for Clearances and other WCB Online Services, phone the WCB Technical Support Team at 954-4803 in Winnipeg or toll free at 1-866-751-9245. A WCB Technical Support Team Member will help you register all of the users for your organization.

Helpful Tips

Please ensure you have all required information before phoning to register. If you do not have all of the required information when you phone to register, you will be required to phone back to continue the registration process.

Using the WCB Online Clearance Request System

General Public Access - Searching in Clearances

To access the Online Clearance Request System as an unregistered user:

1. Go to the WCB Manitoba website (www.wcb.mb.ca) and choose Online Clearances System from Online Services.
2. Click the **General Public Access for Unregistered Users** link.

The **Welcome Page** is the first page you will see after you access the Online Clearance Request System.

Helpful Tips

After your search, check the **Clear Search Results** box to start a fresh search.

Enter a new firm name or number then click the **Search** button to see your new search results.

Using the WCB Online Clearance Request System

Searching Firms

You can search for organizations using two different criteria:

- Firm Name
- Firm Number

Searching by Firm Name

To search by Firm Name...

Select the **Firm Name** radio button...

Enter at least the first 3 characters of the firm name...

Then click the **Search** button.

Searching by Firm Number

To search by Firm Number...

1. Select the **Firm Number** radio button...

2. Enter the **exact** firm number of the organization...

3. Then click the **Search** button.

If you enter the firm number in an incorrect format, an error message will be displayed after you click the **Search** button. The error message will contain the suggested correct format.

Helpful Tips

When searching by **Firm Number**, you have to enter the **exact** firm number of the organization, (e.g. 0486363, C0123456, etc.).

If a Firm Number starts with a "C", ensure you enter the "C" first, followed by the 7 digits.

Firm Numbers can be found on account statements or correspondence file letters.

Using the WCB Online Clearance Request System

General Public Access - Creating Temporary Lists and Printing Clearance Letters

Once you've found the firms you're looking for...

1. Click boxes in this column to select the firms for which you require Clearance Letters.

2. Click the **Add to List** button to "create" a temporary list.

Select	Firm Number	Firm Name / Trade Name and Address
<input checked="" type="checkbox"/>	1111111	EXAMPLE COMPANY 1 BOX 00 GRP 000 RRD, WINNIPEG
<input checked="" type="checkbox"/>	1111111	EXAMPLE COMPANY 2 VRDEN
<input type="checkbox"/>	1111111	EXAMPLE COMPANY 3 1234 CLEARANCE BOULEVARD

After clicking the **Add to List** button, a **View List** button will appear on the **Search Firms** screen. Click this button to perform another search for additional firms to add to your temporary list or to view your list.

The firms you have selected will no longer be visible on this screen because they have been moved to a temporary list.

Click the **View List** button to view the temporary list you created.

Select	Firm Number	Firm Name / Trade Name and Address
<input type="checkbox"/>	1111111	EXAMPLE COMPANY 3 1234 CLEARANCE BOULEVARD

The temporary list you created will appear on the **Requested Clearance List** screen.

OR Request Clearance Letters.

You can delete firms from your list...

View Clearance Status...

Perform another search for additional firms to add to your list...

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 1 BOX 00 GRP 000 RRD, WINNIPEG
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 2 VRDEN

Helpful Tips

Once you've created a list, you can adjust the sort order of the list by clicking on the **Firm Number** or **Firm Name** column headings.

The default sort order is by ascending Firm Name.

Once you leave the Online Clearance Request System, the list you created is erased.

Using the WCB Online Clearance Request System

When you require a document confirming the status of a firm, you can request a Clearance Letter.

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input checked="" type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 1 BOX 00 GRP 000 RRD, WINNIPEG
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 2 VRDEN

Select the firm(s) for which you require Clearance Letters...

Then click the **Request Letter** button.

When you click the **Request Letter** button, the **Clearance Letter Request...** screen will be displayed.

Click the **Submit** button to request a Clearance Letter.

If you do not enter information into any of these fields, the letter will be addressed to "To Whom It May Concern".

Helpful Tips

You can select multiple firms for each letter.

Use the checkbox in the **Select** column heading to select all of the firms in the list.

You can add additional firms to the list by clicking on the **Add Firms** button and searching for more firms.

It is important to remember that this is a temporary list that will be deleted when you leave the Online Clearance Request System website.

Using the WCB Online Clearance Request System

After clicking the **Submit** button, a printer-friendly version of the letter is displayed.

WCB
Workers Compensation
Board of Manitoba

Employer Services Division
210 - 363 Broadway - Winnipeg, Manitoba, Canada - R3C 3N9
Telephone: (204) 954-4935 - Toll Free 1-800-362-3340 - Fax: (204) 954-4800
www.wcb.mb.ca

To whom it may concern, February 23, 2006

Subject: **Clearance Request**

As of **23-Feb-2006** the following firm(s) are registered and in good standing with the Workers Compensation Board:

11111111 EXAMPLE COMPANY 1
BOX 00 GRP 000 PPO, WINNIPEG

Employer Services Division
Clearance Reference #: A000000

Print Exit

Click the **Print** button on the displayed page or the Print button on your web browser to print the letter.

Click the **Exit** button to request additional Clearance Letters from your list or add more firms to your list.

Helpful Tips

Each Clearance Letter has a unique WCB reference number to validate its authenticity.



Using the WCB Online Clearance Request System

Registered User Access - Logging On As a Registered User

To log on to the Online Clearance Request System:

1. Go to the WCB Manitoba website (www.wcb.mb.ca) and choose Online Clearances System from Online Services.
2. When the **Logon** screen is displayed, enter your User ID and password and click the **Logon** button.

Please use the **Log Off** menu item when you have completed your activities on the Online Clearance Request System. If you have been inactive for 30 minutes, the system will automatically log you off. If this happens and you try to perform another system activity, you will be prompted to log on to the system again.

Helpful Tips

The first time you log on to the system, you are required to:

- Change your password. Please refer to the “Changing Your Password” section of this guide.
- Read and agree to the WCB Web Access Agreement. Please read the agreement carefully.

For your convenience, you may wish to “bookmark” the **Logon** screen.

Using the WCB Online Clearance Request System

Registered User Access - Changing Your Password

For security purposes, you must change your password on your initial log on and every 12 months afterwards. You can also change your password anytime you want. Changing your password is a very simple process.

To change your password, check the **Change Password** box on the **Logon** screen shown on page 11. The **Change your password** screen will be displayed.

The screenshot shows a form titled "Change your password:". It contains three input fields: "Current Password:", "New Password:", and "Re-enter New Password:". Below the fields are two buttons: "OK" and "Cancel". Callout boxes with arrows point to the "Current Password" field (labeled "Enter your current password..."), the "New Password" field (labeled "Enter your new password..."), and the "OK" button (labeled "Then click the OK button.").

Then click the **OK** button.

If you have entered an invalid password, an error message will be displayed at the bottom of the screen.

Helpful Tips

When you are required to change your password, the **Change Password** screen will be automatically displayed.

Using the WCB Online Clearance Request System

Registered User Access - The Main Menu/Welcome Page

The Clearance **Welcome Page** is the first page that you will see after you successfully log on. If this is your first time logging on, you will want to click **Search Firms** as indicated in the left-hand balloon in the screen below. After you have logged on and created a list, the next time you log on you can simply go directly to **Select List** as explained in the right-hand balloon.

The screenshot shows the WCB Clearance Request Systems Welcome Page. At the top, there is a navigation bar with links: [Online Services Home](#), [Clearances Home](#), [Search Firms](#), [Select List](#), and [Log Off](#). The main heading is "WCB Clearance Request Systems". Below this, there is a sub-heading "Online or On The Line" and a tagline "Fast Access. Easy-to-use. Accurate information." A paragraph explains that time is money and hiring someone without checking their status with the WCB could be costly. Two callout boxes are present: one on the left pointing to the "Search Firms" link with the text "Click here to search for firms for which you require Clearance Letters." and one on the right pointing to the "Select List" link with the text "Click here to go to the list directory. See 'Saving, Retrieving and Maintaining Lists' on page 16 of this guide for detailed instructions." Below the callouts, there is a list of three options: 1. **The Online Directory:** Search a comprehensive list of businesses by firm number, company or trade style name and immediately see their standing with the WCB. Enter as many names as you want and get immediate information on each one. The Online Directory is available at www.wcb.mb.ca. 2. **Interactive Online List:** Using a secure Internet connection, registered users can create customized, interactive lists of firms and sub-contractors. If a company's status changes, the Clearance Request System will automatically flag the company's name in your file and email you about the change in status the next business day. To register, call 954-4803 (in Winnipeg) or 1-866-751-9245 (toll-free outside Winnipeg). 3. **Automated Phone and Fax Back Service:** Use your phone to get clearance information on a single company or firm by dialing 954-4988 (in Winnipeg) or 1-800-362-3340 (toll free outside Winnipeg). Enter the 7 digit firm number for the business you want clearance information on. You'll also be given the option of entering a fax number to receive confirmation. At the bottom, there is a reference to "Getting Started Guide" and "Frequently Asked Questions" for detailed information on using WCB Clearance Request Systems.

Helpful Tips

You can select multiple firms for each Clearance Letter.

See "Requesting Clearance Letters" on page 19 for more information.

Using the WCB Online Clearance Request System

Creating and Viewing Lists

With registered access, you can create, save, and view **permanent** lists to select the firms for which you would like to request Clearance Letters. For every firm saved in your lists, you will receive e-mail notifications if the status of a particular firm changes.

Searching Firms

Once you've found the firms you're looking for, you can create a list that you can save and refer to when you log on at other times.

1. Click boxes in this column to select the firms for which you require Clearance Letters.

2. Then click the **Add to List** button to create a list.

Select	Firm Number	Firm Name / Trade Name and Address
<input checked="" type="checkbox"/>	1111111	EXAMPLE COMPANY 1 BOX 00 GRP 000 RR0, WINNIPEG
<input checked="" type="checkbox"/>	1111111	EXAMPLE COMPANY 2 VRGEN
<input type="checkbox"/>		EXAMPLE COMPANY 3 1234 CLEARANCE BOULEVARD

After clicking on the **Add to List** button, a **View List** button will appear on the **Search Firms** screen. Click this button to perform another search for additional firms to add to your temporary list or to view your list.

1. Click the **View List** button to view the temporary list you created.

2. The firms you have selected will no longer be visible on this screen because they have been moved to a temporary list.

Select	Firm Number	Firm Name / Trade Name and Address
<input type="checkbox"/>	1111111	EXAMPLE COMPANY 3 1234 CLEARANCE BOULEVARD

Helpful Tips

Once you've created a list, you can adjust the sort order of the list by clicking on the **Firm Number** or **Firm Name** column headings.

The default sort order is by ascending Firm Name.

Using the WCB Online Clearance Request System

The following screen shows the temporary list created and the functions available on that screen.

Click the **Edit Contact Info** button to maintain lists you have created.

See the **“Saving, Retrieving and Maintaining Lists”** on page 16 of this guide for detailed instructions.

You can delete firms from your list...

View Clearance Status...

Perform another search for additional firms to add to your list...

OR request Clearance Letters.

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 1 BOX 50 GPO RD. WINNIPEG
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 2 WGEN

If this is a new list, make sure you save it before exiting the list. Please see page 16 for details on saving a new list.

Helpful Tips

Both the **Save List** and **Edit Contact Info** buttons will take you to the **Maintain Clearance List** screen.

Using the WCB Online Clearance Request System

Saving, Retrieving and Maintaining Lists

If you are a registered user, you can save permanent lists of firms that you contract with often or just for a particular project. For every firm saved in your lists, you will receive e-mail notifications if the status of a particular firm changes. You will have access to the lists that you have created as well as other lists that have been created within your organization.

Saving New Lists

After you have created a list (see page 14), you should save it in order to be able to view it again later. To save your list...

Clearance List: Save List Cancel

Edit Contact Info

Total Items on List: 2 Add Firms Request Letter

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 1 BOX 00 GPP 000 RRD, WINNIPEG
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 2 VROEN

Click the **Edit Contact Info** button which will take you to the **Maintain Clearance List** screen.

Maintain Clearance List: Save List Cancel

Contact Information:

Name:

Address:

City: Province:

Postal Code:

Phone: Fax:

Email:

Total Items on List: 2 Add Firms Request Letter

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 1 BOX 00 GPP 000 RRD, WINNIPEG
X	<input type="checkbox"/>	Good Standing	1111111	EXAMPLE COMPANY 2 VROEN

1. Enter the name of the list...

2. Enter the contact information of the person to whom e-mails should be sent about the list. Fill in all fields in the "Contact Information" section.

3. Then click the **Save List** button to save this list to your list directory.

After you have saved your list, you can click the **Select List** menu item to view the list and add to it, remove firms, or request letter(s) for some or all of the firms on your list. Or, you can exit by clicking the **Log Off** menu item.

Helpful Tips

You can organize your lists by:

- Project
- Industry Sector
- Date

or any other categorization that works best for you.

To better distinguish between your lists, enter a unique name for each list you save.

Using the WCB Online Clearance Request System

Retrieving Lists

To retrieve a saved list...

Delete	List Name	Contact
X	LIST 1	JANE DOE
X	LIST 2	JANE DOE
X	LIST 3	JANE DOE
X	LIST 4	JANE DOE
X	LIST 5	JANE DOE
X	LIST 6	JANE DOE
X	LIST 7	JANE DOE
X	LIST 8	JANE DOE
X	LIST 9	JANE DOE

Maintaining (or Editing) Lists

The Online Clearance Request System lets you maintain or edit your saved list directory in three ways:

- i) Add more firms to or delete firms from a saved list;
- ii) Create a new list or
- iii) Delete a saved list from the directory.

i) Adding More Firms To or Deleting Firms From a Saved List

To add more firms to or delete firms from a saved list, retrieve the list then...

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Good Standing	11111111	
X	<input type="checkbox"/>	Good Standing	22222222	
X	<input type="checkbox"/>	Good Standing	33333333	

Helpful Tips

Clearance status is updated daily.

You can access the **Online Clearance Request System** 24 hours a day, 7 days a week.

Using the WCB Online Clearance Request System

ii) Creating a New List

To create new lists, click the **Select List** menu item then...

Click the **Create List** button to search for firms to add to a new list or click the **Search Firms** menu item. (See **"Creating and Viewing Lists"** on page 14 of this guide.)

Delete	List Name	Contact
X	LIST 1	JANE DOE
X	LIST 2	JANE DOE
X	LIST 3	JANE DOE
X	LIST 4	JANE DOE
X	LIST 5	JANE DOE
X	LIST 6	JANE DOE
X	LIST 7	JANE DOE
X	LIST 8	JANE DOE
X	LIST 9	JANE DOE
X	LIST 10	JANE DOE
X	LIST 11	JANE DOE

iii) Deleting a Saved List from the Directory

To delete a saved list from your directory, click the **Select List** menu item then...

Click the "X" to delete a list from the list directory.

Delete	List Name	Contact
X	LIST 1	JANE DOE
X	LIST 2	JANE DOE
X	LIST 3	JANE DOE
X	LIST 4	JANE DOE
X	LIST 5	JANE DOE
X	LIST 6	JANE DOE
X	LIST 7	JANE DOE
X	LIST 8	JANE DOE
X	LIST 9	JANE DOE
X	LIST 10	JANE DOE
X	LIST 11	JANE DOE

You will see a message asking if you are sure you want to delete the selected list. Click the **OK** button to delete the list or the **Cancel** button if you do not want to delete the list.

Using the WCB Online Clearance Request System

Registered User Access – Requesting Clearance Letters

When you require a document confirming the status of a firm, you can request a Clearance Letter.

If you are a registered user, you can request Clearance Letters for two different types of lists:

- Lists before they are saved
- Lists after they have been saved

Requesting Clearance Letters from Unsaved lists

The screenshot shows the 'Clearance List' interface. A callout bubble points to the 'Select' column, stating: 'Select the firms for which you require Clearance Letters...'. Another callout bubble points to the 'Request Letter' button, stating: 'Then click the Request Letter button.' The table below shows three example firms.

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Good Standing	11111111	EXAMPLE COMPANY 1 BOX 00 GRP 000 RR90, WINNIPEG
X	<input type="checkbox"/>	Good Standing	11111111	EXAMPLE COMPANY 2 WIRREN
X	<input type="checkbox"/>	Good Standing	11111111	EXAMPLE COMPANY 3 1234 CLEARANCES BOULEVARD

When you click the **Request Letter** button, the **Clearance Letter Request...** screen is displayed.

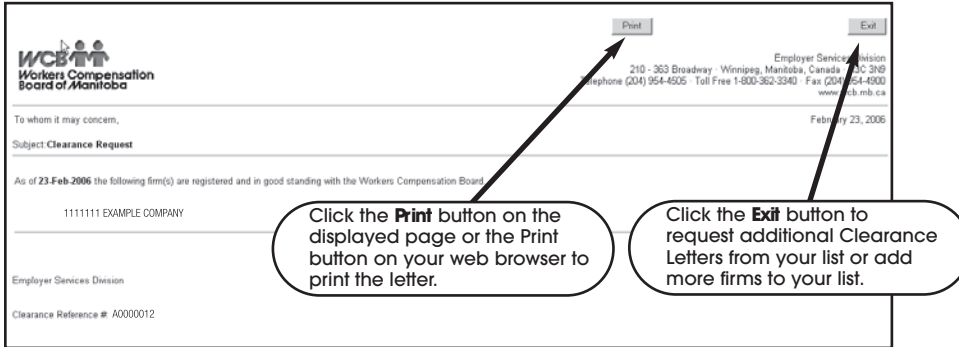
The screenshot shows the 'Clearance Letter Request...' form. Callouts provide instructions: 'Check this box and a field for a fax number will appear. The WCB will fax your Clearance Letter to the number you enter in this field. If you choose this option and click the **Submit** button, you will return to the Clearance Request System where you can request additional Clearance Letters from your list or add more firms to your list.'; 'If you do not enter information into any of these fields, the letter will be addressed to "To Whom It May Concern".'; 'If you choose Print Locally, your Clearance Letter will be printed to your local printer.'; and 'Click the **Submit** button to view your Clearance Letter.'

Helpful Tips

Each Clearance Letter has a unique WCB reference number to validate its authenticity.

Using the WCB Online Clearance Request System

If you choose Print Locally and click the **Submit** button, a printer-friendly version of the letter will be displayed.



Requesting Clearance Letters from Saved Lists

Before you can request Clearance Letters from a saved list, you need to retrieve the list. Please see the "Saving, Retrieving and Maintaining Lists" section of this guide. After you have retrieved the list, follow the same instructions for requesting Clearance Letters from an unsaved list.

Getting Help

If you have general questions, you may be able to find the answer in the **Frequently Asked Questions (FAQ)** section of the Online Clearance Request System. In fact, it may be helpful to browse through the FAQ before you register to use the system. The FAQ list is accessible from the **Logon** screen of the Online Clearance Request System and on the WCB website (www.wcb.mb.ca).

If you require more in-depth technical assistance with the Online Clearance Request System, please contact the WCB Technical Support Team at 954-4803 in Winnipeg or toll free at 1-866-751-9245. The Technical Support Team is available to you 24 hours a day, 7 days a week.

Helpful Tips

If you are requesting a Clearance Letter from a saved list, you will not be prompted to enter contact information. The letter will be addressed with or faxed to the contact information you provided when you created and saved your list.