

A Guide for Using WCB's Online Clearance Request System



Using the WCB Online Clearance Request System

Table of Contents

Overview	3
System Requirements of the Online Clearance Request System	3
When you can use the Online Clearance Request System	3
Following WCB's Security Policy	4
Getting Started	6
General Public Access for Unregistered Users	6
Registered User Access	6
General Public Access for Unregistered Users – Searching in Clearances	7
Searching Firms	8
Searching by Firm Name	8
Searching by Firm Number (also known as Account Number)	8
General Public Access – Creating Temporary Lists and Printing Clearance Letters	9
Registered User Access – Logging On as a Registered User	12
Registered User Access – Changing Your Password	13
Registered User Access – The Main Menu/Welcome Page	14
Creating and Viewing Lists	15
Searching Firms	15
Saving, Retrieving and Maintaining Lists	17
Saving New Lists	17
Retrieving Lists	18
Maintaining (or Editing) Lists	18
Adding More Firms to or Deleting Firms from a Saved List	18
Creating a New List	19
Deleting a Saved List from the Directory	19
Registered User Access – Requesting Clearance Letters	20
Requesting Clearance Letters from Unsaved lists	20
Requesting Clearance Letters from Saved Lists	21
Getting Help	21

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.

NOTE: In this document Firm Number and Account Number are interchangeable and are referring to the same number.

System Requirements of the Online Clearance Request System

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

- Microsoft Internet Explorer 8.0 or above
- JavaScript enabled on your web browser
- Cookies enabled on your web browser**

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 is available to you 24 hours a day, seven days a week. The WCB Technical Support Team is available to assist you from Monday to Friday, 8:00 AM to 7:00 PM (except on statutory holidays).***

* 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 challenge question previously selected by you 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 **204-954-4803** 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 **204-954-4803** in Winnipeg or toll free at **1-866-751-9245** to update or remove the employee's access.

Helpful Tips

Never share your
User ID or password!

Using the WCB Online Clearance Request System

For security purposes, registered users will be required to read and agree to WCB's Terms and Conditions 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.



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 (wcb.mb.ca) and clicking on Online Clearances System under Online Services. Please refer to the Searching in Clearances section. 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, phone number and email address of all the users they wish to register.

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 Payroll
- your WCB Firm Number (also known as Account 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 204-954-4803 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

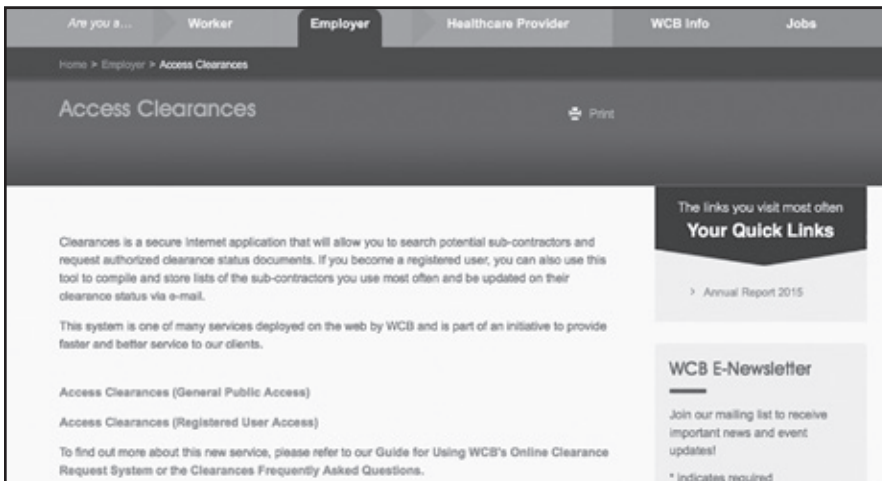
Please ensure you have all required information before phoning to register. If you do not have all of the required information when you phone to register, you will be required to phone back to continue the registration process.

Using the WCB Online Clearance Request System

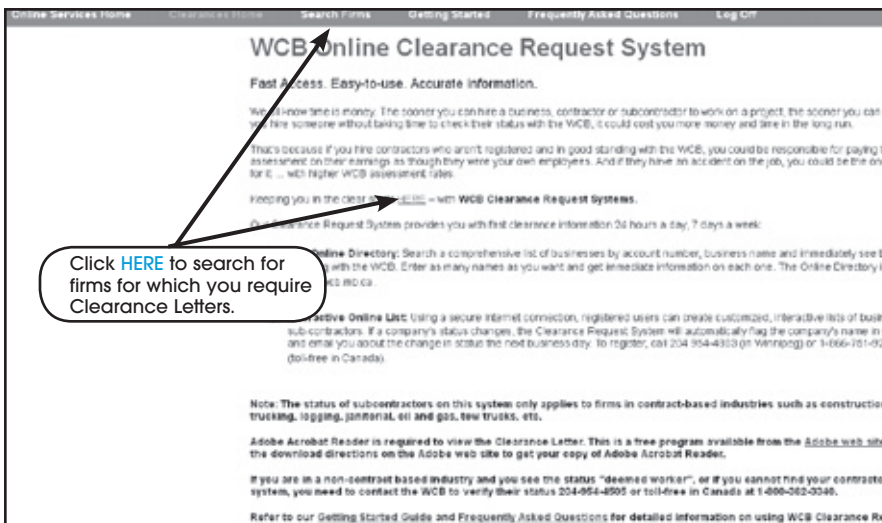
General Public Access for Unregistered Users - Searching in Clearances

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

1. Go to the WCB Manitoba website (wcb.mb.ca) and click Access Clearances.
2. Click **Access Clearances (General Public Access)**.



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 (also known as Account Number)

Searching by Firm Name

To search by Firm Name...

The screenshot shows the 'Search Firms' page. It features a search form with two radio buttons: 'Firm Name' (selected) and 'Firm Number'. A text input field is labeled 'Enter at least 3 characters'. A 'Search' button is on the right. Below the form is a table with columns for 'Select', 'Firm Number', and 'Firm Name / Trade Name and Address'. Callouts include: 'Select the Firm Name radio button...', 'Enter at least the first 3 characters of the firm name...', and 'Then click the Search button.'

Searching by Firm Number (also known as Account Number)

To search by Firm Number (also known as Account Number)...

The screenshot shows the 'Search Firms' page. It features a search form with two radio buttons: 'Firm Name' and 'Firm Number' (selected). A text input field is labeled 'Enter valid firm numbers and press Enter after each one'. A 'Search' button is on the right. Below the form is a table with columns for 'Select', 'Firm Number', and 'Firm Name / Trade Name and Address'. Callouts include: '1. Select the Firm Number radio button...', '2. Enter the exact firm number (also known as Account Number) of the organization...', and '3. Then click the Search button.'

If you enter the firm number (also known as Account 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 (also known as Account Number)**, you must enter 7 digits, (e.g. 1234567).

If the firm number (also known as Account Number) has less than 7 digits add zeros to the beginning of the account number (e.g. 1234 enter 0001234). Firm Numbers are found on account statements and account correspondence (where they are called Account Number).

When searching by Firm Name, only active registered accounts will display.

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.

Select	Firm Number	Firm Name / Trade Name and Address
<input type="checkbox"/>		

Click the Add to List button...

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

Select	Firm Number	Firm Name / Trade Name and Address
<input type="checkbox"/>	0019675	ROSLAND CONSTRUCTION (1989) LIMITED 751 LAPODROISE BOULEVARD, WINNIPEG
<input type="checkbox"/>	1337475	ROSLAND CONSTRUCTION INC. 751 LAPODROISE BOULEVARD, WINNIPEG
<input type="checkbox"/>	0016685	ROSLAND DISTRIBUTORS

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.

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

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"/>	0019675	ROSLAND CONSTRUCTION (1989) LIMITED 751 LAPODROISE BOULEVARD, WINNIPEG
<input type="checkbox"/>	1337475	ROSLAND CONSTRUCTION INC. 751 LAPODROISE BOULEVARD, WINNIPEG

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

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

Clearance List:

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Good Standing	0500074	TRANSX LTD 2596 INDIAN BOULEVARD, WINNIPEG, MB R3T 1A5
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Good Standing	0500074	TRANSX LTD BOX 36 GAY 200 RR 2, WINNIPEG

Callouts:
 - You can delete firms from your list... (points to Delete column)
 - View Clearance Status... (points to Clearance Status column)
 - Perform another search for additional firms to add to your list... (points to Add Firms button)
 - OR Request Clearance Letters. (points to Request Letter button)

Message to users

Adobe Acrobat Reader is required to view the Clearance Letter. This is a free program available from the Adobe web site. Follow the download directions on the [Adobe web site](#) to get your copy of Adobe Acrobat Reader.

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

Requested Clearance List:

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Good Standing	0500074	TRANSX LTD 2596 INDIAN BOULEVARD, WINNIPEG, MB R3T 1A5
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Good Standing	0500074	TRANSX LTD BOX 36 GAY 200 RR 2, WINNIPEG

Callouts:
 - Select the firm(s) for which you require Clearance Letters... (points to Select column)
 - Then click the **Request Letter** button. (points to Request Letter button)

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

Clearance Letter Request...

Select one or more of the following formats to send the letter.
All fax requests are queued and processed between the hours of 8am and 7pm - Monday to Friday

Fax Request

Print Locally

Subject Line:

Buttons: **Submit**, **Cancel**

Callouts:
 - Click the **Submit** button to request a Clearance Letter. (points to Submit button)
 - If you do not enter information into any of these fields, the letter will be addressed to "To Whom It May Concern". (points to Subject Line field)

Helpful Tips

You can select multiple firms for each letter.

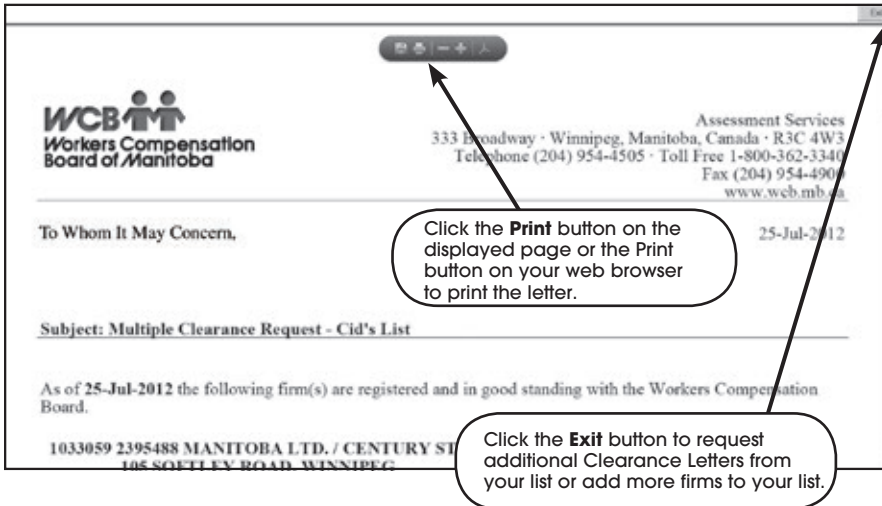
Use the checkbox in the **Select** column heading to select all of the firms in the list.

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.

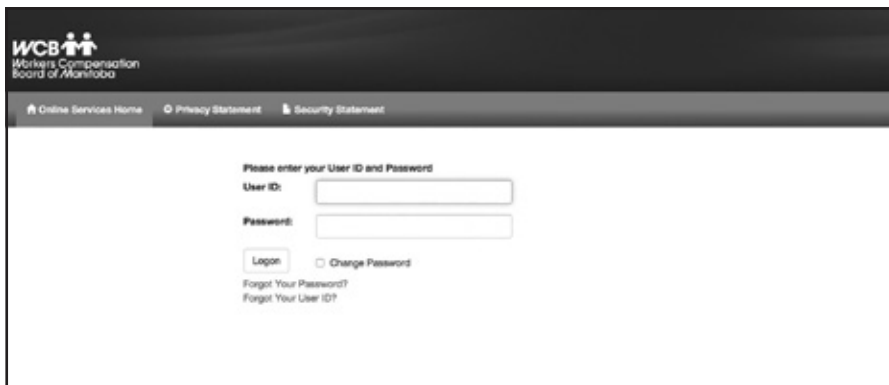


Helpful Tips

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

A screenshot of the WCB Online Clearance Request System login page. The page features the WCB logo and navigation links for 'Online Services Home', 'Privacy Statement', and 'Security Statement'. The main content area is titled 'Please enter your User ID and Password' and contains two input fields: 'User ID:' and 'Password:'. Below these fields are a 'Logon' button, a 'Change Password' link, and two links for 'Forgot Your Password?' and 'Forgot Your User ID?'.

To log on to the Online Clearance Request System:

1. Go to the WCB Manitoba website (wcb.mb.ca) and select Access Clearances.
2. Select **Access Clearances (Registered User Access)**.
3. 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’s Terms and Conditions. Please read the agreement carefully.

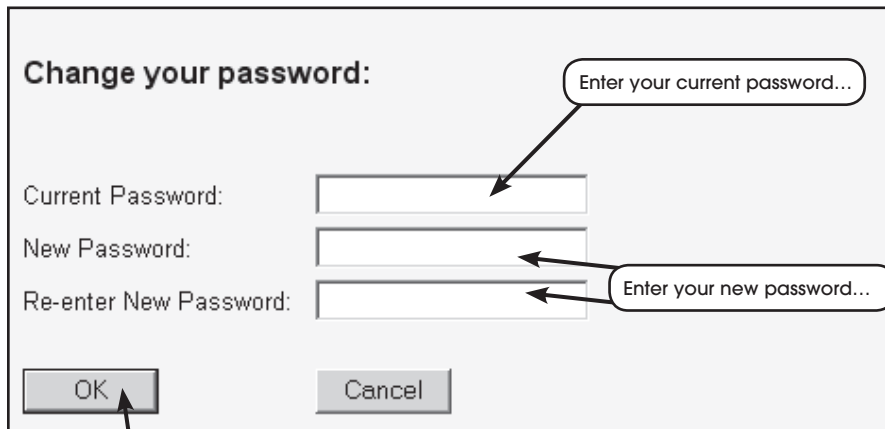
For your convenience, you may wish to “bookmark” the **Logon** screen.

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. 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 top of the screen.

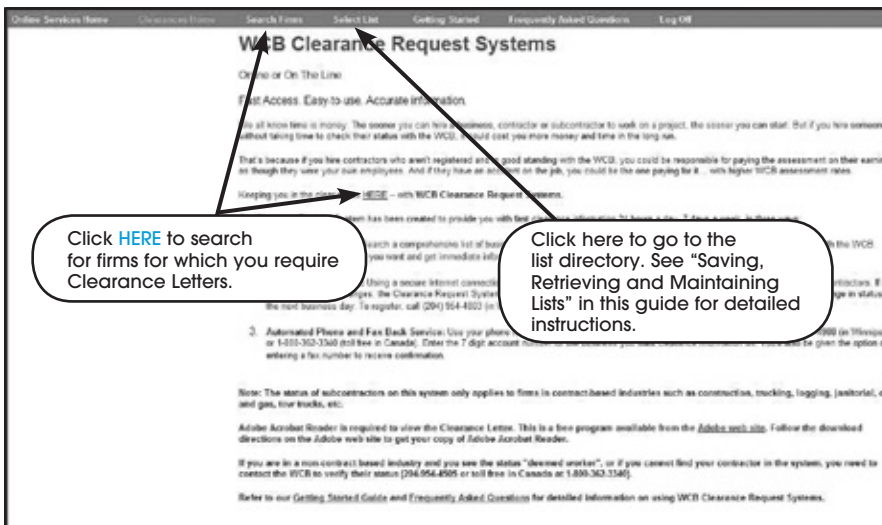
Helpful Tips

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.



Helpful Tips

You can select multiple firms for each Clearance Letter.

See "Requesting Clearance Letters" 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 type="checkbox"/>	1111111	EXAMPLE COMPANY 1 800 OLD BRD DR, WINNIPEG
<input type="checkbox"/>	1111111	EXAMPLE COMPANY 2 WIGEN
<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.

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

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

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

If this is a new list, make sure you save it before exiting the list. Please see “Saving, Retrieving and Maintaining Lists” for details on saving a new list.

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

See the “**Saving, Retrieving and Maintaining Lists**” section for detailed instructions.

The screenshot shows a web application interface for managing clearance lists. At the top, there are navigation tabs: "Home Services Home", "Clearance Home", "Search Firms", "Select List", "Getting Started", "Frequently Asked Questions", and "Log Out". The main heading is "Clearance List: mylist". Below this, there are buttons for "Save List", "Cancel", and "Edit Contact Info". A table lists firms with columns for "Delete", "Select", "Clearance Status", "Firm Number", and "Firm Name / Trade Name and Address". Two rows of firms are visible. Callouts point to the "Delete" button, the "Select" checkbox, the "Clearance Status" column, the "Add Firms" button, and the "Edit Contact Info" button.

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Deemed Worker	1106479	2191542 MANITOBA INC. ERIC'S NEST RESTAURANT & BAR 3732 SIMON'S HILL ROAD, SIMON HILL
X	<input type="checkbox"/>	Deemed Worker	2203383	4644762 MANITOBA LTD. WILSON'S REDOUBT GOLF 489 OLD BRIDGE ROAD, PORTAGE LA PRAIRIE

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.

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, you should save it in order to be able to view it again later. To save your list...

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

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

Helpful Tips

Clearance status is updated daily.

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

Retrieving Lists

To retrieve a saved list...

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...

Using the WCB Online Clearance Request System

ii) Creating a New List

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

The screenshot shows the 'Select Clearance List' interface. At the top right, there is a 'Create List' button. A callout box with an arrow pointing to this button contains the text: '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.**”)

iii) Deleting a Saved List from the Directory

The screenshot shows the 'Select Clearance List' interface. In the 'Your Lists' table, the first row has an 'X' icon in the 'Delete' column. A callout box with an arrow pointing to this 'X' contains the text: 'Click the “X” to delete a list from the list directory.'

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

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

Delete	Select	Clearance Status	Firm Number	Firm Name / Trade Name and Address
X	<input type="checkbox"/>	Deemed Worker	1108479	218122 MANITOBA INC. (BIRD'S NEST RESTAURANT & BAR) 2103 BIRD'S HILL ROAD, BIRDS HILL
X	<input type="checkbox"/>	Deemed Worker	0000000	4044702 MANITOBA LTD (BIRD'S NEST GOLF) 403 OLD BRIDGE ROAD, PORTAGE LA PRAIRIE

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

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.

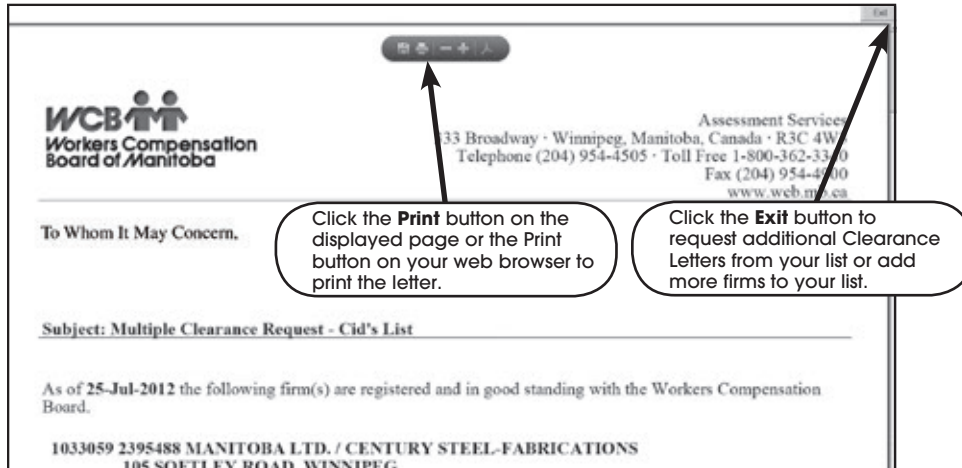
Click the **Submit** button to view your Clearance Letter.

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 (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 204-954-4803 in Winnipeg or toll free at 1-866-751-9245. The WCB Technical Support Team is available to assist you from Monday to Friday, 8:00 AM to 7:00 PM (except on statutory holidays).

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.