TELUS
health solutions

WorkSafeBC Provider Portal

Reporting

User Guide

(Version 5.3; 2014.10.20)

Table of Contents

Document Revision Log

Revision Number	Revision Date	Changes Requested By	Reason for Change	Author
Version 5.0	Aug 10, 2011		Final – Stage 1	THS
Version 5.1	Apr 11, 2012		Enhancements to Portal V2.1. More details in Appendix A.	THS
Version 5.2	Nov 14, 2012		Enhancements to Portal V2.3.	THS
Version 5.3	Oct 20, 2014		No changes to content. Updated document version to align with other guides.	THS

Disclaimer

The examples presented in this document are taken from a test environment, using test data not actual claim information.
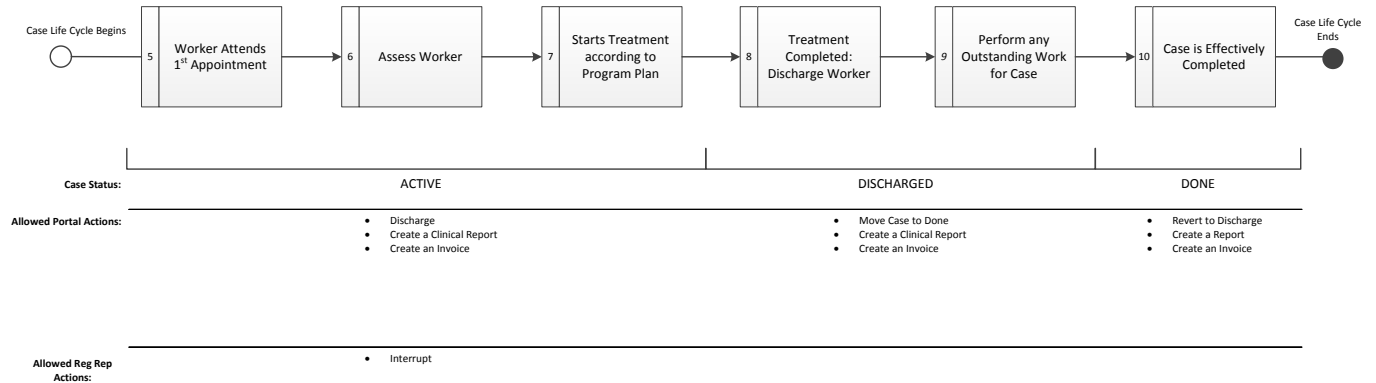
1 Introduction and Overview

1. Explain the high lights of the system:

   - **Describe** in business terms what the system allows the provider to do and deliver (e.g., electronically and in real time);

2. For Stage 1, we are keeping the process as simple and as straightforward as possible in part to minimize the degree of change and any complexity:

   - As a starting point, we are keeping the reports the same and asking you to submit them as PDFs;

3. Reports must be submitted in the context of an existing Referral or Case;

   - For each program (approved for the portal), all Reports will be submitted electronically, including:

     - Initial Assessment Report, Progress Report, Discharge Report;
     - Related medical reports and other related reports.

2 Business Process Overview

4. Life cycle of a Referral from the point that it transitions to a Case to its natural completion point – covering the major events and associated states and statuses as they relate to Reporting;

5. Core main line process – key steps and workflow for submitting a Report:

   - Report Form IDs and what they mean in the portal;

   - Exceptions processes; for example, what if the form id doesn't exist?

Cases Life Cycle

Case Life Cycle (Core Main Line)

Case Status:	ACTIVE	DISCHARGED	DONE
Allowed Portal Actions:	• Discharge • Create a Clinical Report • Create an Invoice	• Move Case to Done • Create a Clinical Report • Create an Invoice	• Revert to Discharge • Create a Report • Create an Invoice
Allowed Reg Rep Actions:	• Interrupt		

3 Functions and Features

3.1 Introduction

The key functions and features are listed below followed by specifics and examples for each:

- Referrals and Cases
    - o Work Lists;
    - o Referral Details Screen;
    - o Referral Header;
    - o Action Panel;
- Reporting
    - o Create Report Screen;
    - o Report Submission Confirmation Screen;

3.2 Referrals and Cases

3.2.1 Work Lists

Work Lists provide access to Referrals and Cases throughout the portal;

The current status of the Referral or Case will determine which work list the user must use to access the Referral or Case they wish to submit a Report for.

3.2.2 Referral Details Screen

The Referral Details Screen provides detailed information related to a Referral or Case. The Referral Details screen includes both Referral and Worker Claim information;

The Referral Details Screen is the user's starting point for Reporting.

3.2.3 Referral Header

The Referral Header provides a summary of the most important information related to a Referral so that it is easily accessible and can be viewed quickly.

Information in the Referral Header is re-purposed for submission of Reporting by the portal to minimize repetitive data entry and minimize the potential for data entry errors.

JAREMA , HARTINDER			
Date of Birth	Oct 31, 1959 (51) Female	Program/Service	Pain
PHN	9439567451	Location	Vancouver
Referral Auth	A0600931428	Claim Number	00671546
Referral Status	ACTIVE	Eligibility Status	Allowed

3.2.4 Action Panel

Located on the right hand side of the Referral Details screen, the Action Panel provides the functionality to fully complete a process end to end.

The command to Create a New Report is accessed from the Action Panel. *For more information on Referral and Cases related functions and features, see Referrals and Cases Training document.*

3.3   Reporting

Reporting provides the user with the ability to submit a Report to WorkSafeBC through the Portal. Reports can only be submitted in the context of a Referral or Case that is available in the portal.

3.3.1 Create Report Screen

The Create Report Screen is the interface used for Report submission through the portal. Components of the Create Report Screen include:

- **WSBC Form ID** – Refers to the WorkSafeBC Report Form ID used to identify the type of report that is being submitted. Reports must be submitted using the correct Report Form ID. *This is a required field.*

- **Progress report # or Program module #** – Provider reference number to identify the specific report within the context of a treatment program or program module that is being submitted (i.e. Progress Report #2). Complete only if applicable to the report being submitted. *This is not a required field.*

- **Report number** – Provider's control number for the report; Typically a unique report number that identifies this specific report within the context of the Provider Clinic Locaiton and/or Provider Organization. *This is a required field.*

- **Report date** – The Report Date on the physical report; This may or may not be the same date as the date the report is submitted to WorkSafeBC. *This is a required field.*
    - The portal will programmatically determine the date and time a Report is submitted. The user cannot enter a submission date.

- **Date of service** – Refers to the Date of Service as defined by WorkSafeBC for the referred program or service. *Refer to WorkSafeBC procedures, practices and contract for specific details. This is a required field.*

- **Attachment(s)** – Allows the user to select an electronic version of the Report(s) to upload to the portal to submit to WorkSafeBC.
    - Reports submitted through the portal must be in PDF format;
    - Only PDF files may be attached
    - Total size of all PDF files cannot a maximum file size of 7 MB;
    - Do not submit password protected PDF files;
    - All files will be automatically combined into one PDF file when submitted to WorkSafeBC. The files will be combined in the order in which they are attached.

- **Submit Report** – Submits the Report to WorkSafeBC.

Create Report

RADOVICH , EDOUARD

Date of Birth	Jan 14, 1951 (61) Male	**Program/Service**	OR1
PHN	9139559601	**Location**	BIM REHAB - RICHMOND
Referral Auth	A0601133175	**Claim Number**	00163835
Referral Status	SCHEDULED	**Eligibility Status**	Allowed

Choose the type of report you want to submit.

WSBC Form ID: ⬤ BSRGRTWP - GRTW Plan (or Revised/Updated GRTW plan) ▾

Progress report # or program module #: TEST1 (if applicable)

Report number: ⬤ T9955

Report date: ⬤ 2012-11-13 Enter the report date from the document

Date of service: ⬤ 2012-11-13

Attachments

CAUTION: All attachments here will be merged into a single document and submitted as a single report indicated by the WorkSafeBC Form ID that was selected. Please ensure that all attached pdf documents pertain only to the WorkSafeBC Form ID that was selected above. The total size of attachments cannot exceed 7MB.

Report Attachment 1.pdf [▲] [▼] [Delete]

Report Attachment 3.pdf [▲] [▼] [Delete]

Report Attachment 2.pdf [▲] [▼] [Delete]

[_____] [Browse...] ⬤

[Submit Report] ⬤

3.3.2 Report Submission Confirmation Screen

Displays a confirmation screen of the Report submission, including the following information:

The report submission is captured in the Report Submission History panel (see section below)

To print the Confirmation screen, Use the browser's print command to print the screen.

Create Report

RADOVICH , EDOUARD

Date of Birth	Jan 14, 1951 (61) Male	Program/Service	OR1
PHN	9139559601	Location	BIM REHAB - RICHMOND
Referral Auth	A0601133175	Claim Number	00163835
Referral Status	SCHEDULED	Eligibility Status	Allowed

Report Form ID: BSRGRTWP
Progress report # or program module #: TEST1
Report number: T9955
Report date: Nov 13, 2012
Date of service: Nov 13, 2012
Submitted: Nov 13, 2012 1:57:25 PM

Please print this page as the confirmation of your submitted report. Report submissions are also logged in the Report History panel for future reference.

- Worker Information:
    - o Worker name;
    - o Worker's date of birth;
    - o Worker's Personal Health Number (if available);

- Claim Information:
    - o Claim Number;
    - o Claim Eligibility Status;

- Referral Information:
    - o Referral Authorization Number;
    - o Referred Program/Service;
    - o Referred Clinic Location;

- Submitted Report Information:
    - o Report Form ID;
    - o Provider's Report Information:
        - ▪ Progress report/Module number;
        - ▪ Report number;
        - ▪ Report date;

- o Date of service;
- o Date and time the report was submitted through the portal;

3.3.3 Report Submission History

Displays the details of any report that has been submitted for the Referral.

Report History

Nov 13, 2012 1:57:25 PM		
	WorkSafeBC Form ID:	BSRGRTWP
	Report #:	T9955
	Report Date:	Nov 13, 2012
	Date of Service:	Nov 13, 2012
	Progress Report #/Program Module #:	TEST1
	Submitted By:	Mary Rtest
	Report PDF:	Report Attachment 1.pdf **More**

If more than one PDF file was submitted with the report, the "More" link will be shown. Click on it to view a list of PDF files that were submitted.

REPORTING

₄ Usability Suggestions – Factors & Considerations

From a usability perspective, we list a number of considerations below.

1. Reports can only be submitted within the context of an existing Referral or Case;

   - Therefore, it is important for portal users to have at least a basic understanding of Referrals and Case management practices and procedures;

   - Reports cannot be submitted for a Referral that has not been 'accepted';

     o Therefore, if the Referral status is "New" the Create Report function will not be available;

2. Confirm the Referral or Case context and associated information before submitting the report (i.e., Referral-based Case for contracted programs or services):

   - A provider's Case identifies the Referral for "The Worker's Claim" (Claim and Worker information);

     o If there is a Referral, it will be attached to the Case. The Referral contains the entitlement (Program and associated Services);

       ▪ In Stage 1, this is the Referral Form;

     o The entitlement identifies the Program / Service to be delivered;

     o The Provider's contract for "that" program contains the fee schedule and business rules;

   - Important confirmation steps to ensure that you are attaching the correct Report:

     o Confirm claim and patient/worker information (i.e., "the worker's claim");

     o Confirm Referral, program and contract:

   - If required for further details, perform a query on any of the representative profiles – Referral or Case;

     o For a contracted Program:

- ○ Confirm or indicate the phase, module, segment or service that is going to be reported;

3. Once a Report has been submitted, it cannot be revoked or cancelled by the Provider;

   - The Report is submitted immediately to WorkSafeBC;

4. Providers cannot access submitted reports through the portal; therefore it is important that they maintain a copy of the Report on their internal system for future reference;

5. Portal users must have the ability to generate a version of their report in PDF format:

   - The portal will not do this conversion for the user;

   - The PDF file(s) must be prepared in advance of submitting it through the portal;

6. There are restrictions to the filesize of a Report uploaded through the portal;

   - The combined size of all PDF files attached cannot exceed 7 MB.

   - This limitation may further be impacted by inadequate connection speed, causing the portal to timeout before the upload can be completed;

7. Any user that has access to the portal will have the ability to submit a Report for any Referral or Case in the portal within the context of any Clinic work location that that user has been assigned access to.

5 Organizing Your Work

5.1 Reporting – Practices and Procedures

5.1.1 Managing timeliness

Practices and procedures regarding the timeliness of Report submissions are governed by WorkSafeBC contracts with the Providers.

5.1.2 Managing the workflow

Reports may be submitted at any point in the lifecycle of a Referral or Case, after the Provider has accepted the Referral.

The type of report, when and how often a Provider is required to submit a report will be governed by the Provider's practices and procedures and contractual requirements from WorkSafeBC.

5.2 Program and contract based Reporting (i.e., Referrals for a program):

No specifics at this time;

5.3 Change management considerations

5.3.1 Business process change and information availability

- Data is now in electronic form;
    - o Referrals are provided electronically;
    - o Reports are submitted electronically;
- This now allows the portal to automate Referral based Reporting.

5.3.2 Automated system functions:

- Prepopulating known data for Report submission:
    - o The Portal will populate the Create Report form with Referral details including Worker information, Claim information and Referral details;

- Timeliness and ease of report submission;
  - o Reduces dependency on fax machine for report submission;
  - o Reduces need to print report in paper format in order to submit;

5.3.3 Key principals:

- "Do it now" concept;
  - o Timeliness and accuracy of the information maintained in the Portal is important;
- Workarounds for any limitations and/or constraints:
  - o Provider must prepare a PDF version of the Report in advance of submission;
    - ▪ This may require special software to be installed on the user's workstation;
  - o Some report sizes may exceed practical limitations of what can be uploaded and submitted through the portal;
    - ▪ In these cases, report submission must be done by fax or mail unless the report file size can be reduced;
  - o Important to maintain accurate information in the portal to ensure that business processes are not impacted by incorrect data;
  - o Provider must maintain a copy of the submitted report on their internal systems;
    - ▪ Once submitted, the Report cannot be accessed through the portal;
- Special considerations for access rights (e.g., visibility).
  - o Only users requiring access to the Portal to perform specific functions, or access Referral or Case information should be provided access to the Portal.
  - o User can see only those Referrals or Cases associated to the locations they have access to;
    - ▪ Within the context of the Provider Organization that they are currently logged in under;
    - ▪ Users can only submit Reports for the Referrals and Cases they have access to through the portal;
  - o All users can see all areas of the Portal – Referrals, Cases, Invoicing, and Payments;
    - ▪ No restrictions on user's ability to see specific areas of the Portal;
    - ▪ No restrictions on any user's ability to perform any task in the Portal (for example, anyone can submit a Report for a Referral that is associated to a location they have access to);

6 Major Business Processes

6.1 Introduction

- Referral core main line– happy path (high-level review only to establish context);

- Reporting core main line – happy path;

- Special cases – typical problem and error situations;

- User experience - potential challenged/problem areas;

6.2 Referrals - Core Main Line (Happy Path)

- Acknowledge Referral;

- Accept Referral;

- Schedule Worker;

- Worker Shows Up;

- Move Referral to Active Cases;

* See Referrals and Cases Training document for more details;

6.3 Reporting - Core Main Line (Happy Path)

- Starting point:
    - Active Cases Work List;
    - View Referrals Details screen;
    - Action Panel: Create Report;

6.3.1 Report screen:

- Description:
  To ensure the Provider submits the Report with required data;

- Actions:
    - Confirm worker and claim details;
    - Confirm referred program/services and clinic location information;

- o Select Report Form ID;
- o Enter report information, where applicable, such as:
    - Report Number;
    - Report Date;
    - Service Date;
- Practices and rules:
    - o The report must be for a specific Worker and a specific Claim;
    - o The report must be for a specific Provider location and a specific contracted Program or Service deliverable by the selected location;
    - o It is important for the Provider to select the correct Report Form ID for the type of report and program/service the report is being submitted for;
    - o Provider must ensure they enter the Date of Service as defined by WorkSafeBC;
    - o Only one report can be submitted at a time;
    - o Attachments must be in PDF format only;

6.3.2 Attach Report

- Description:
  To upload an electronic version of the Report to be submitted;
- Actions:
    - o Select PDF file(s) to upload:
- Practices and rules:
    - o Attachments must be in PDF format only;
    - o Attachments cannot exceed 7MB in total
    - o An uploaded file is not submitted to WorkSafeBC until the user clicks the Submit button;

6.3.3 Submit Report

- Description:
  To submit the uploaded electronic Report to WorkSafeBC;
- Actions:
    - o Click Submit Report button on Create Report screen;
    - o Confirmation Screen will appear when the submission has completed;
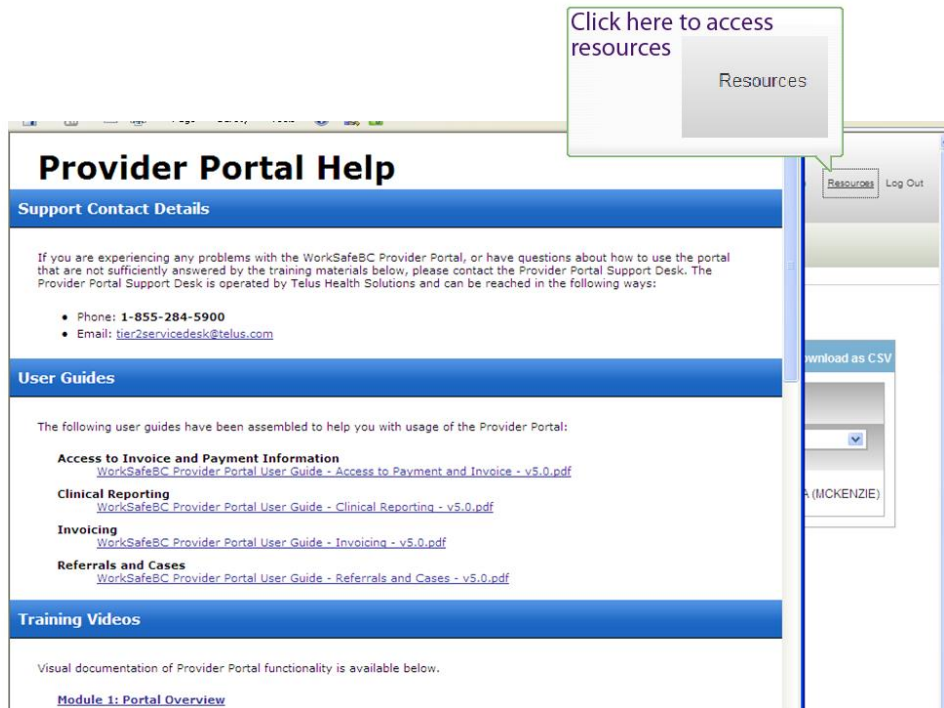
- o User may print the confirmation screen using their browser's print function for their records;

- Practices and rules:
  - o Once the report has been submitted, it cannot be revoked or cancelled;
  - o User cannot access submitted reports through the portal

7 Summary of Key Points

1. As a suggestion, users should summarize the key points in the module (i.e., as a characterization of the business process and functionality that are pertinent to them or their organization's processes) including:

   - Key points and considerations;

   - Practical guidelines;

2. As a suggestion, users should consider "Applying what you learned" as follows:

   - **Ask** "what would you now do differently back on the job?"

     o Relate back to their experience discussed as part of the course;

   - **Suggest** recording 3-5 key ideas, success factors or action steps;

   - **Suggest** reviewing the Business Processes and write a short summary of the process and deliverables or key points for themselves;

3. As a suggestion, users now have expanded their network of contacts (i.e., both within their own organization and externally with other providers) and they should be sure to use them.

8 Resources

The Resources section contains training materials and documents, including this user guide, for easy reference by users.

Appendix A: Summary of Revisions

Revision	Changes to document
V5.1	▪ Addition of 3.3.3 Report Submission History Panel ▪ Addition of Section 8 Resources