

## Using PMP for Electronic Submission of WSIB Form 8 to TELUS HEALTH

PMP allows for the direct submission of WSIB Forms to the TELUS HEALTH (TH) portal. This procedure is completed without the need to access the TH portal.

Here are just a few of the benefits for using the PMP for WSIB form submission.

- Patient information transfers from the patient file to WSIB forms
- Forms are made and stored locally on your computer
- Forms are included in PMP backups
- Forms are created without access to the internet. An internet connection is required only to send completed forms.

To facilitate electronic submission of PMP's WSIB forms electronically to TH, users are required to:

- be registered with TH and have a username and password
- have a WSIB Provider ID.

## Setup PMP

From the **Setup** menu, go to **Doctor Defaults**. Choose the practitioner and select **Edit this Doctors Defaults**.

Beside the **WSIB** tab type in your *UserName* provided by TH.

Type in your *WSIB Provider ID*.

Select your *Designation* if necessary.

Checkmark **Enable WSIB Electronic Form Submission**.

Click **Accept**.

Doctor Defaults for : Daniel David Palmer, DC #1234

Personal Info	<b>WSIB Details</b>
Appointment Book	UserName <input type="text" value="s2sBCuat1F8"/>
Patient Defaults	Provider ID <input type="text" value="123456789012"/>
Statements	Designation <input type="text" value="Chiropractor"/>
ChiroWrite	<b>Electronic Forms Submission</b>
Activity	<input checked="" type="checkbox"/> Enable WSIB Electronic Form Submission
Receipts	
<b>WSIB</b>	

# Creating & Sending WSIB Form 8's in PMP

## Accidents

The **Accidents** section lists all accidents related to this patient. Buttons in this section are:

- **New Accident** a new accident is created - details will be populated after creating a form
- **Edit Comments** allows you to add a comment to the accident
- **Delete** will delete an accident if there were no forms created using this accident

The screenshot shows the PMP software interface for patient Amy Love. The 'Accidents' section contains a table with one entry:

Accident ID	Date	Claim Number	Comments
129	1-Jul-2013	84972949	

Below the table are buttons for 'New Accident', 'Edit Comments', and 'Delete'. The 'Form Data' section contains a grid of buttons for various form types: FAF, Form 8, Treatment Ext. (0148), Physio TE(0153A), UE Init. Ass. (2864), UE Care/Out.(2865), LB Init. Ass.(3238), LB Care/Out.(3239), LE Init. Ass. (2098), LE Care/Out.(2099), MTBI Init. Ass.(3240), MTBI Care/Out.(3241), Shoulder Ass. (2522), Shoulder Out (2524), and Progress Report (26). Below these buttons is a table of submitted forms:

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/ Final	Invoice Number
129	112	Form8	Submitted	10003562020130822110021		22-Aug-2013	Final	1012
129	110	Form8	Submitted	10003562020130822104229		22-Aug-2013	Final	1010

Below the table are buttons for 'Edit Comments', 'Edit', 'View / Print', 'Delete 'Draft'', 'Submit Form8 to WSIB', and 'Print Log'. At the bottom, there are navigation buttons: 'Next', 'Previous', 'Save', 'Cancel', 'New Patient', and a search section for 'Last name', 'Number', 'First name', 'Other', and 'Continue'. A footer note says 'Press F2 to add an appointment, or press F10 to process an activity'.

## Form Data

All forms required by WSIB are created by clicking the appropriate button.

The table below the report buttons are forms created for this patient.

Below your forms are buttons that offer additional functions for your forms:

- **Edit Comment** allows you to add comments to a form
- **Edit** allows a *Draft* form to be edited
- **View / Print** will open the Ace Viewer and display your form
- **Delete 'Draft'** allows you to delete *Drafts*. **Note:** *Final* forms cannot be edited or deleted.
- **Submit Form8 to WSIB** will electronically send your Finalized form to TH
- **Print Log** offers a report detailing the status of electronically submitted Form 8's.

## Completing the Form 8

Click onto the **New Accident** button if you do not have an existing accident for the patient. Read the message boxes; click **Yes**, then **OK**.

Click the **Form 8** button.

WSIB Health Professional's Report (Form 8)

✓ Section A | ✓ B-C1 | ✓ C2 | ✓ C3-C4 | ✗ D1-D3 | ✓ E | ✓ F1-F2 | ✓ F3-F4

**Claim Number**

Claim Number	Date of Birth	Date of Accident	Social Ins. No.
84972949	11/07/1965	01/07/2013	

**A. Patient Information**

Last Name	Initial	First Name
Love	C	Amy

**Address**

1001 Bay St, #214

**Language**

English

**Other Language**

City	Province	Postal Code	Telephone Number	Gender
Thornhill	Ontario	L4K 7J8	(905) 967-1238	Female

**Employer/Company Name**

Go Transit

**Job Title/Occupation**

technician

**Test Form** **Cancel** **Save as 'Draft'** **Save for WSIB submission (unalterable)**

1 field needs to be corrected. (1 Error)

The form will open with the sections in tabs across the top. Click on any tab to go to the specific part of the form. Many fields will be populated with information pulled from the patient file.

Patient information fields can be edited and the changes will be reflected in the patient information field containing the original information. For example, if you change the telephone number in Section A the change will reflect on the Patient Information Info 1 tab.

The fields contained in WSIB forms will require the use of calendars, drop down selections, check boxes, and typing. The printed forms will replicate WSIB produced forms.

WSIB and TH have specific rules that must be followed when completing forms for electronic submission. These rules have been incorporated into PMP forms to avoid rejection.

### Additional Buttons

The bottom portion of the form contains the following buttons:

**Test Form** **Cancel** **Save as 'Draft'** **Save for WSIB submission (unalterable)**

- **Test Form** when pressed will mark a red 'X' on the tabs signifying incomplete parts of the form and highlight required fields in yellow.
- **Cancel** closes the form without saving and brings the user back to the WSIB forms tab.
- **Save as Draft** will save all information input so far allowing you to edit or complete the form at a later time
- **Save for WSIB (unalterable)** saves the form in an unchangeable format. Use this button only when you are sure all the information is complete and correct.

Click **Test Form** to locate required areas of the form that are incomplete. Tabs where validation rules fail will be marked with a red 'X'. Fields will be highlighted in yellow. Move your mouse over yellow fields to produce a hint. Once a yellow field has been completed the colour will return to normal by clicking **Test Form** again.

If you are unable to complete the form click **Save as Draft**. The form will be saved as a Draft on the main WSIB forms tab.

Click **Edit Comments**. Type a comment about the status of the form or missing information on the form. Click **OK**. The comment will now be added to the form description.

To add additional information to a form click the draft form in the list followed by **Edit**. When the form is complete click **Save as WSIB Submission (unalterable)**.

*Final* and *Submitted* forms cannot be edited or deleted; we recommend printing draft forms and double checking for accuracy before finalizing.

## Submitting the Form 8

Once the form has been *Finalized* the **Submit Form8 to WSIB** button will become active. Make sure that the form for submission is highlighted by selecting the line. Click **Submit Form8 to WSIB**.

The screenshot shows a 'Form Data' window with a grid of buttons for various form types: FAF, Form 8, Treatment Ext.(0148), Physio TE(0153A), UE Init. Ass.(2864), UE Care/Out.(2865), LB Init. Ass.(3238), LB Care/Out.(3239), LE Init. Ass.(2098), LE Care/Out.(2099), MTBI Init. Ass.(3240), MTBI Care/Out.(3241), Shoulder Ass.(2522), Shoulder Out(2524), and Progress Report(26). Below this is a table with columns: Accident ID, Form ID, Form Type, WSIB Status, WSIB confirmation, Comments, Date, Draft/Final, and Invoice Number. The first row is highlighted in blue and contains: 130, 111, Form8, Ready to Submit, (blank), (blank), 22-Aug-201Final, and 1011. At the bottom of the window is a toolbar with buttons: Edit Comments, Edit, View / Print, Delete 'Draft', Submit Form8 to WSIB (highlighted in yellow), and Print Log. A red arrow points to the 'Submit Form8 to WSIB' button.

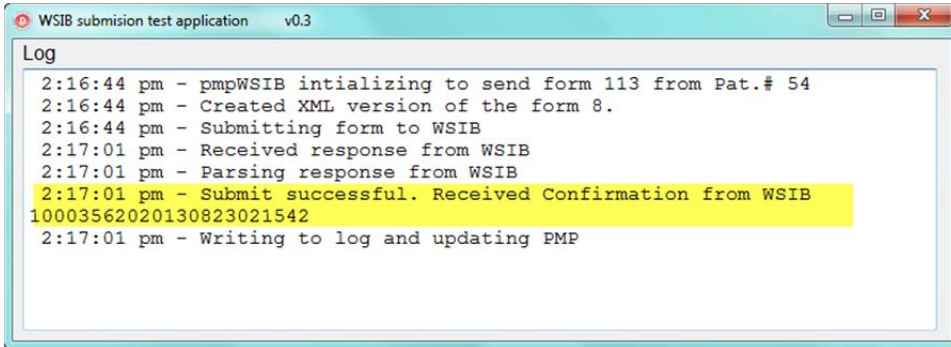
A pop up will appear requesting your password. Input the required information.

The screenshot shows a small dialog box titled 'Please enter' with a close button (X) in the top right corner. The text inside the dialog reads: 'Enter password for WSIB portal for username YTUGJNBR.2'. Below the text is a text input field. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

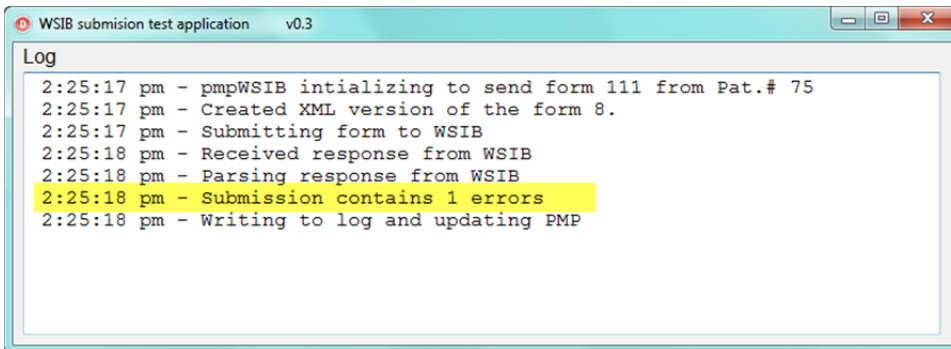
**Be patient.** A communication screen will appear with details from TELUS HEALTH regarding the submission.

Read the screen.

The screen below contains confirmation the form was submitted successfully.



This screen contains information that 1 error was found. The form must be corrected and resubmitted.



The WSIB submission screen will disappear after a few moments.

Once back on the *WSIBForms* tab your Form 8 will show either **Submitted** or **Submit Errors**.

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/Final	Invoice Number
▶ 121	109	Form8	Submitted	10003562020130823112340		23-Aug-201	Final	1009

Accident ID	Form ID	Form Type	WSIB Status	WSIB confirmation	Comments	Date	Draft/Final	Invoice Number
▶ 130	111	Form8	Submit Errors			22-Aug-201	Draft	1011

## Log Report

Beside the **Submit Form8 to WSIB** button you will see a **Print Log** button.

The report offers filter options to assist in locating the information required.

**Note:** this log is also available under the WSIB menu from the main appointment book.

To determine the reason for a Submit Error choose to filter the response by *Failed Submissions*.

Fri, 23 Aug 2013		<b>WSIB Submission Log</b>				Date From:	14-Aug-2013	Page No.	1
		Filtered by Patient; Date; Failed Submissions;		Date To:	23-Aug-2013				
Sent	Error	Date	Time	Form ID	Pat. No.	Patient Name	WSIB Username	Confirmation	
✓	✓	Aug 14, 2013	1:53:12 PM	107	18	Lloyd, Bradley	s2sBCuat1F8		
									203 Occupation on CLINICAL is not allowed to contain character(s) '&'. Please remove the character(s).
✓	✓	Aug 14, 2013	1:38:04 PM	106	18	Lloyd, Bradley	s2sBCuat1F8		
									302 The claim number 12345678 is not valid
✓	✓	Aug 14, 2013	1:19:00 PM	105	18	Lloyd, Bradley	s2sBCuat1F9		
									301 Login authorization failed

Read the highlighted line to determine the reason for the rejections.

Close the log and select the **Edit** button to return to the form. Correct the cause for the rejection.

Resubmit the form.