B.C.

Electronic

Form 7

User Guide

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parklane
SYSTEMS

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BC Electronic Form 7 XML User Guide

Electronic Form 7

In conjunction with WorkSafe BC's initiative to have employers file Form 7's electronically, Parklane Systems provides this capability through a secure internet connection to WorkSafe BC.

Parklane has developed this feature with strict adherence to WorkSafe BC's specification standard ISSv3.

Largely, the goal of WorkSafe BC is to make the submission of a paperless form more convenient for its clients and the agency itself. The decision to electronically submit or to fax the Form 7 is entirely up to the customer as Parklane Systems' Incident Reporting module still maintains the capability of producing the standard paper Form 7. A company can choose to use both methods of submission; fax and electronic, however, once a form has been submitted in one format, any further submissions/updates to that claim must be in the same format.

Getting started electronically is as easy as calling WorkSafe BC to register. At the time of registration, WorkSafe BC will provide your company with unique identifiers which the Incident Reporting module will then automatically include in each electronic Form 7 submission. Electronic submission of a form means that your company can also electronically check the status of a claim on a daily basis, if required.

The electronic Form 7 has been "path-o-logically" designed. This means that the first step in completing the form, classifying the type of incident being reported, will determine the panels and questions presented to the user for completion. For example, a non-injury submission would present a different set of panels and questions than an injury or fatality submission. This feature, combined with a number of mandatory fields and validation checks, ensures that the user provides WorkSafe BC with all imperative and critical information required when reporting an incident or injury the first time.

Defining Electronic Form 7 Worksite Information

Before being able to electronically submit a Form 7, your company must first register by phone with WorkSafe BC. At the time of registration, WorkSafe BC will provide several items of identifying information which are unique to your company.

To enter the information provided by WorkSafe BC, on the main menu of Incident Reporting click on **More**, **Options, Accident Form Variables** and then **Default Worksite**:
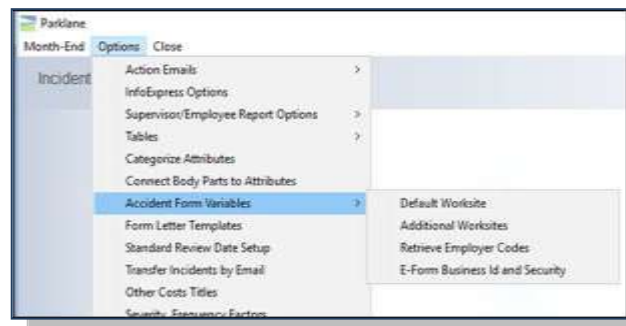
In addition to the standard fields found on this panel, complete the WorkSafe Employer ID and Employer Location Code with the information provided by WorkSafe BC. The Partner ID and Token fields provided many be entered on the **E-Form Business Id and Security** panel.

If you complete the Payroll person's information it will auto fill the appropriate fields in the Form 7.

If your company has multiple sites or produces forms for multiple locations, click on **More, Options, Accident Form Variables** and then **Additional Worksites**:

Use the Retrieve Employer codes report detailed presently to ensure that you complete the Class. Unit, WorkSafe Employer ID and Employer Location Code fields with the correct and correlated information. Complete any additional information found on the panel.

If you complete BOTH the Reporting Name and Phone Number fields, the appropriate fields in the Form 7 will auto fill with this information. If you only complete the Phone Number field, the information will NOT transfer across to the Form 7.

WorkSafeBC has deemed it MANDATORY that an Additional Worksite is setup for each Employer Location Code that your company will be using. It is optional whether or not you choose to set up Additional Worksite(s) for each Classification Unit found within each Employer Location Code. If you choose to not set up Additional Worksite(s) for the Classification Units you may simply select the appropriate Classification Unit from the list provided on page two of the Form 7.
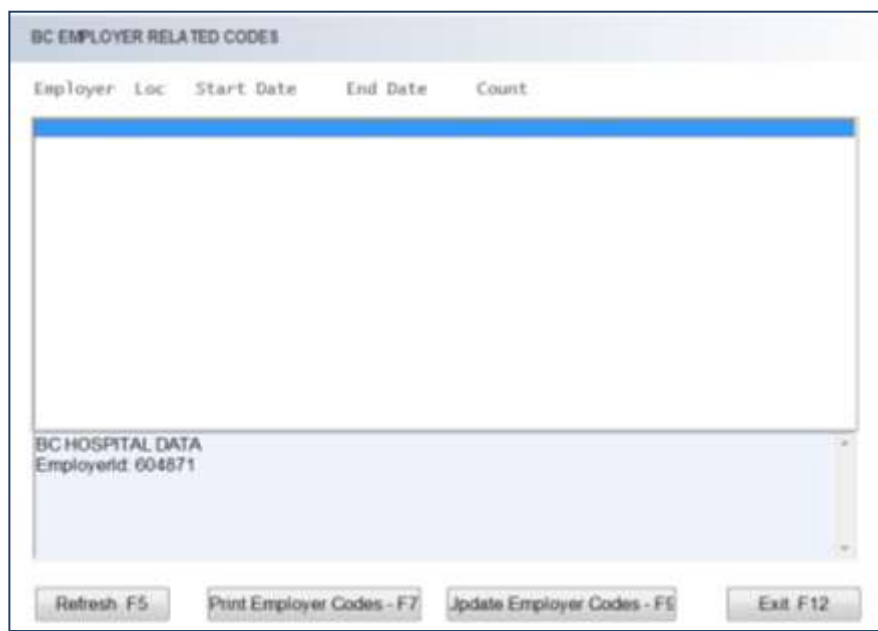
Employer Codes for XML

WorkSafe BC assigns unique Class/Sub-Class Industry Codes to each company. A company may not only have multiple worksites/locations but also multiple Sub-Class Industry Codes for each location. As the Sub-Class Industry Code is one of the mandatory and validated fields required when submitting an Electronic Form 7 it is important that your company maintain an up-to-date Industry Code listing.

To update your company's listing of Employer Industry Codes, from the main menu of Incident Reporting click on **More, Options, Accident Form Variables** and then **Retrieve Employer Codes**:
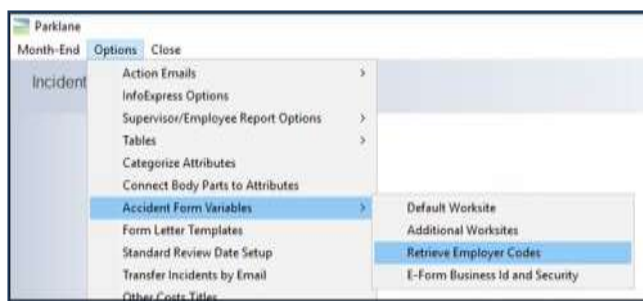
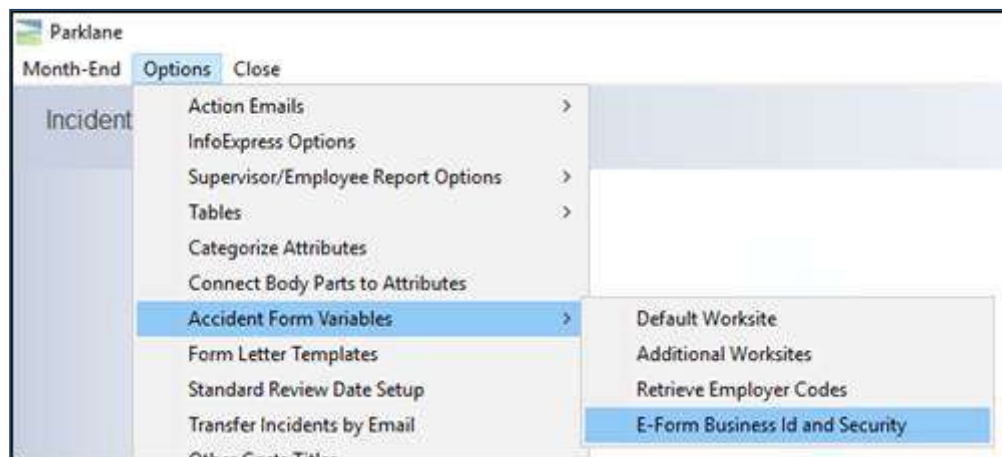and you will be presented with the BC Employer Related Codes panel:

Click on the **Update Employer Codes-F9** button and WorkSafe BC will electronically update your listing with any additions or changes.

Click on the **Print Employer Codes-F7** button and you will be presented with a list of all your Location Codes, their related Industry Class Codes and the start and stop dates for each Industry Code. This report will be useful to you when you are completing your Additional Worksites information detailed previously.

E-Form Business Id and Security

WorkSafe BC assigns each employer with a Partner ID and a Token for submission of E-Forms. This security information must be entered here on the E-Form Business Id and Security panel. The system will check and use these security credentials during submission. If no credentials are entered, then E-Forms cannot be submitted.

Completing/Submitting an Electronic Form 7

Parklane Systems' Incident Reporting module is used to record all workplace incidents such as no injury, first aid, health care, lost time and recurrences. In the past, an important part of its functionality was to also produce a Form 7 which could then be faxed to WorkSafe BC. Now there is also the capability of electronically submitting a Form 7.
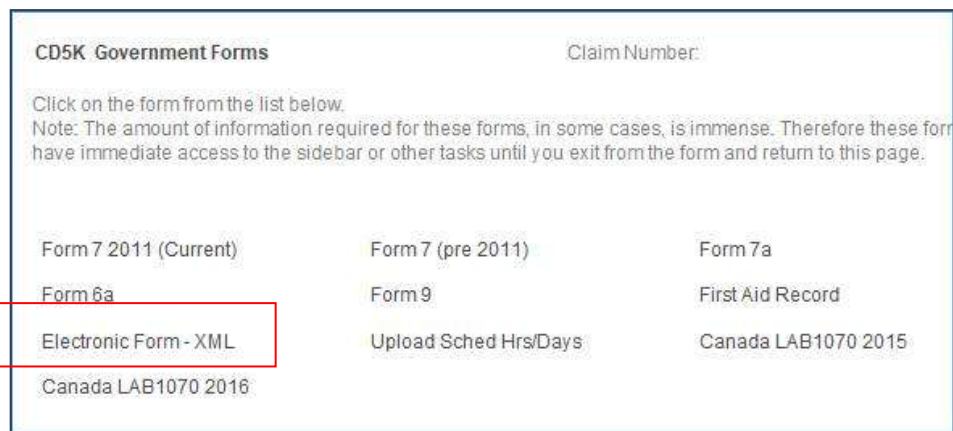
Once the incident information has been entered, click on **Government Forms** on the side bar menu.

Then select: **Electronic Form – XML**

and the first page of the electronic Form 7 will present itself:

Within the Case Definition box there are four possible selections; Involves NO Workers, One Fatal Worker, One Injured Worker and One Not Injured Worker.

Each Case will present a different series of panels and questions for completion. Some of the fields on some of the panels will be mandatory with the majority being optional. Filling in one field may make another field mandatory while Case definition will in itself make some fields mandatory. As well as mandatory checks there are some validation checks, for example; valid Social Insurance and Worker's Health Numbers, birthdates, etc. The user cannot exit a panel and/or submit the form if any of the mandatory fields have not been completed with valid information. In order for the program to recognize that all mandatory fields have been completed the user must Continue/Page Down thru all of the panels immediately prior to clicking on the Submit – F1 button.

The Wage Template – F2 button will allow the user to print a Worker Wage Detail Template which can then be submitted to the HR department for completion and return. This information will be required before the Form 7 can be electronically submitted.

Turn on the radio button in the Case Definition box which best describes the incident you are about to report to WorkSafe BC and then click on the Continue – F6 button and you will be presented with the second page of the electronic Form 7:

If the Submitting and/or Reporting Employer fields contain the wrong information, click on the Get Sites – SF1 or SF2 buttons and select the appropriate site(s) from the list box(es) provided. The Class/Sub-Class Industry Code field will auto-fill with the correlated information based upon your selection for the Reporting Employer. You can also use the Classifications - SF3 button to select from a list of Industry Classifications that are valid for the current Reporting Location Code.

As mentioned previously, some of the fields on some of the panels are mandatory. As demonstrated by the above panel, the mandatory fields will always have a pink background as opposed to the standard white background which designates fields as being optional for completion. Any field with a gray background is locked and cannot be accessed or modified.

Clicking on the Page Down button at the bottom of each panel will advance the user to the next

panel/page of the Form 7. As in the past with the standard Form 7, some of the information entered in the Incident Reporting module will auto fill the corresponding and appropriate fields found within the electronic Form 7.

When all other required information has been completed, click on the Submit – F1 button found on the first page and the Submit Form 7 panel will present itself:

Clicking on the Secure Submit – F4 button will submit the form to WorkSafe BC:

The "Form 7 Submission Completed" message will only appear if the Form has been accepted in it's entirety by WorkSafe BC:

Should your Form 7 contain invalid information, you will be presented with error messages detailing the problem(s), for example:

The current errors will be marked with an asterisk (*). All older error messages will also be shown. The asterisks (*) will disappear only after a valid submission. The Show All Errors – F7 button will provide the user with a list of ALL of the submission errors for the selected claim.

The user may then go back to the fields in question, correct the errors and re-submit the Form 7.

Check the Status of a single submitted Form7.

Open an existing Form7 that was already submitted, over 24 hours ago.

From the first screen, click the button: "**Submit – F1**"

From the screen below, click the button: "**Show Status SF4**"

From the screen below click the button: "**Check Status F6**"

To retrieve the claim status, of the current claim, press the button: "**Submit Request F5**"

The results of the Status response will be listed on the screen below.

If you check the Status on the same day of the submission it will be in the list below the submit date.

When a claim number is returned by WorkSafeBC the Form7 and the Incident record will automatically be updated with the claim number.

History/Status of Electronic Form 7's

One of the benefits of electronically submitting a Form 7 is the capability of also electronically checking the status of the Form with WorkSafe BC. The electronic status check can be performed as often as you require, making it a convenient and time efficient way of monitoring all of your Form 7's.
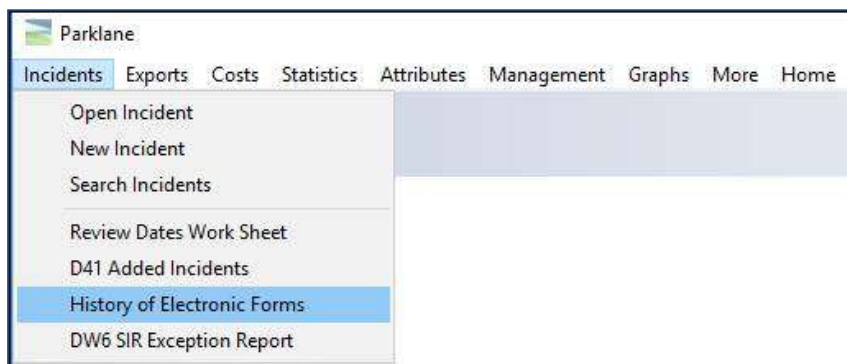
To check on the status of any or all electronically submitted Form 7's, from the main menu of Incident Reporting click on **Incidents** and then on **History of Electronic Forms:**
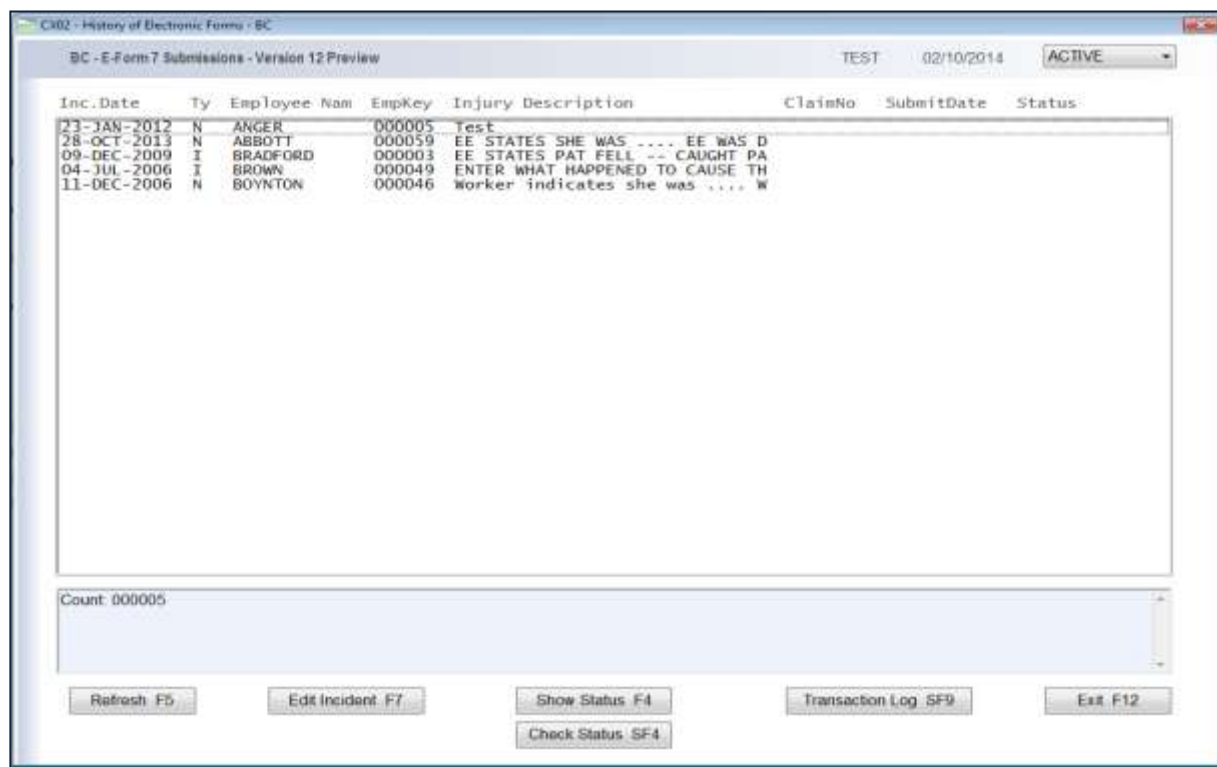
The **Edit Incident F7** button will allow you to edit the incident/Form 7 you have selected.

The **Transaction Log SF9** button shows a list of submission and communication status messages used internally by Parklane Support.

The drop-down box found in the top right corner of the panel has several filter selections, allowing you to choose which claims will be shown in the Status of Electronic Forms panel:

The selections will filter the electronic Form 7's in the following ways:

ALL - Shows all Electronic Form 7's EXCEPT those for incidents which have been cancelled on the

Description panel of Incident Reporting

ACTIVE - Shows all Electronic Form 7's which have information completed. This selection does NOT include any Form 7's which have the Denied or No Further Action buttons turned on on the Description panel of Incident Reporting. Also does NOT include any Form 7's which have a WorkSafe BC claims status code of DI (disallowed) or RE (rejected)

CANCELLED - Any Electronic Form 7 which is associated with an incident which has been cancelled on the Description panel of Incident Reporting

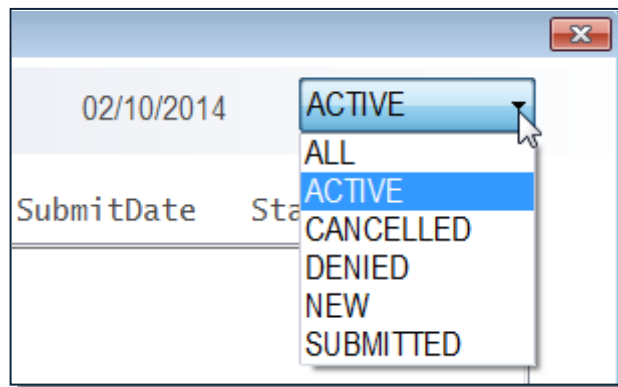DENIED - The exact opposite selection of Active. This selection shows any Form 7's which have the Denied or No Further Action buttons, from the Description panel of Incident Reporting. This selection also shows any Form 7's which have a WorkSafe BC claims status code of DI (disallowed) or RE (rejected).

NEW - Shows all Form 7's which have been started but NOT submitted or have been submitted but Failed due to errors SUBMITTED - Shows all Form 7's which have been SUCCESSFULLY submitted (ie: a submission correlation ID has been received back from WorkSafe BC)

NOTE: Please see the WorkSafe BC's Submission/Claim Status Messages topic detailed later in this document for further information on status codes.

There are two options for checking the status of claims; the user may either choose to check a single claim or multiple claims up to a maximum of 100 may be checked at once.

To check the status of a single claim, select the appropriate claim from the list shown in the **Status of Electronic Claims** panel shown above, then click on the **Show Status F4** button and you will be presented with the Claims Status History panel:

To check the status of a multiple submitted claims, click on the **Check Status SF4** button and you will be presented with the "Retrieve Multiple Submission Status" screen.

Enter the Start and End Dates for the range of the claims submissions which you wish to check the status of. Then click the "Submit Request" button.

A message will display showing the number of submitted claims found for the selected date range:
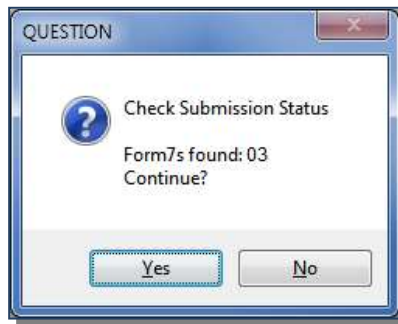
Click on the Yes button to continue. Once the Submission Status Check has completed running, the list in the Status of Electronic Forms panel will automatically be refreshed, indicating which claims have had their status changed.

An asterisk (*) next to the Status column indicates that a claim's status has changed since a previous submission check. The asterisk (*) will only remain visible on the panel on the day that the current check was completed. A plus sign (+) indicates that a claim has been successfully submitted to WorkSafe BC, however, a Check Status has not yet been completed on that particular claim. The plus sign (+) will remain on the panel until such time as a Check Status has been completed. In both cases, follow the procedure(s) detailed previously to either view or check the submission status of claim(s).

NOTE: Claim numbers are not assigned by WorkSafeBC until the day after a claim is submitted. A claim will be updated with a claim number only after it has been accepted by WorkSafeBC and only after a Check Status has been completed.

Submission/Claim Status Messages

Below are listings of submission/claim status messages. This information, current as of July 11, 2008, was made available to Parklane Systems Inc. by WorkSafe BC. Parklane Systems Inc. does not take responsibility in any way for the ongoing content of the information provided as WorkSafe BC may make changes over time which may not be reflected.

Submission Status Messages:

Submission Status Code	Submission Status Message	Description
CNP	Incident not processed yet	This message applies to cases where the submission currently resides in the interim repository (also referred to as the "queue") awaiting processing.
CAC	Incident was accepted	This message applies to cases where the submission is now stored in the WCB Accident Registry System.
CNW	**Incident has no workers**	**This message applies to cases where the incident involves no workers. For Reported Incidents involving no workers, only the submission status will be returned. Submission has no workers and therefore no claim numbers.**
CNF	**Submission not found**	**This message applies to cases where the submission is not found in the queue or in the WCB Accident Registry System.**

Submission Status Message Comments:

Possible Values	Description
Reported Only	This refers to one of the following two cases:

- Injured worker (not fatal) with no wage loss and no healthcare treatment received and no damaged appliance.
- Non-injured worker (not fatal) with no wage loss and no healthcare treatment received and no damaged appliance.

Claim waiting to be assigned	This refers to the case where WCB Accident Registry Program has not matched the worker to a claim yet.
Claim has been assigned	This refers to the case where WCB Accident Registry Program has matched the worker to a claim.

Claim Status Response:

Claim Status Code	Claim Status Message	Description
AC	This claim has been accepted.	AC – The claim has been accepted.
AI	We require more information to process this claim.	The claim has been accepted for investigative purposes only. Only health care costs are payable. This is not a final decision on the claim.
AN	This claim has been accepted.	The claim has been accepted on an interim basis. Only wage loss costs are payable. This is not a final decision.
DI	This claim has not been accepted.	This claim has been disallowed.
PE	We require more information to process this claim.	The claim is in a pending state as we have not made a claim decision yet.
SU	We require more information to process this claim.	The claim has been suspended as we did not have all the evidence we required to make a claim decision.
HC	This claim has been accepted for health care only.	The claim has been accepted for the payment of health care benefits only.
IN	This claim has been registered but needs more information.	The claim has been recorded for information purposes only. There was no medical attention sought nor time loss involved.
RE	This claim has not been accepted.	The claim has been rejected. The claim does not meet the requirements of the Workers Compensation Act.

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