CareHub User Guide

Workers' Compensation Board – Alberta

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Introduction

Welcome to CareHub

CareHub offers health-care providers a shared portal to streamline Return-to-Work (RTW) referrals, share information quickly and securely, and enhance communication and connectivity – providing timely, seamless access within one digital platform.

Getting started

Accessing CareHub

To access CareHub, users must enter their credentials in the designated fields and select **Sign in.**

Signing in

The Sign in screen displays two (2) fields:

- Username (Username or User ID)
- Password

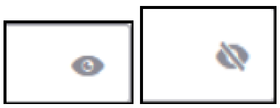
To Sign in:

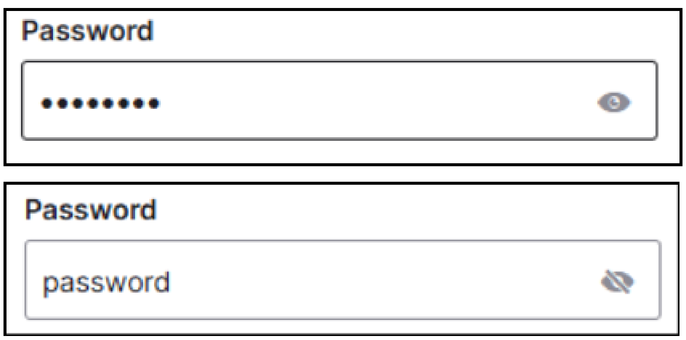
1. Enter your credentials in the Username and Password fields.

2. Click the Sign in button located below the fields to access CareHub.

If the user needs to see what password data has been entered, the eye icon within the Password field can be selected to reveal the characters entered.

If the eye icon within the password field is not selected (default), the characters will remain hidden with circular icons displaying only.



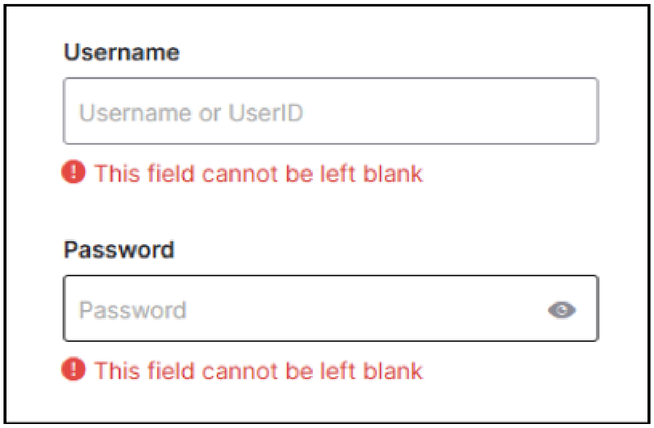


After the user clicks the **Sign in** button, they may be redirected to myWCB to complete Multi-Factor Authentication (MFA). Once this MFA step is successfully confirmed, the user will be redirected back to CareHub where they can access information and functions based on security access for their assigned role. The MFA process will be required once every 24 hours.

Error messaging

If the credentials used in the sign in fields are incorrect, do not exist or a field is left blank, error messaging will be displayed.

If a user is signing in and a field is left blank, error messages will display as **This field cannot be left blank:**

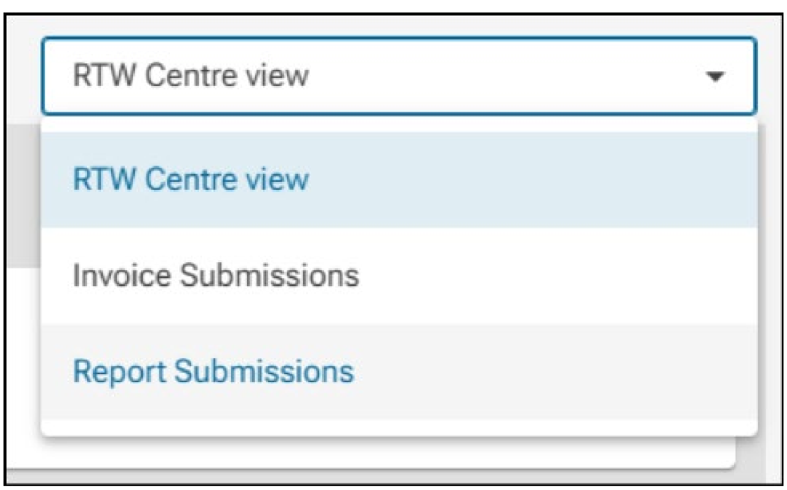


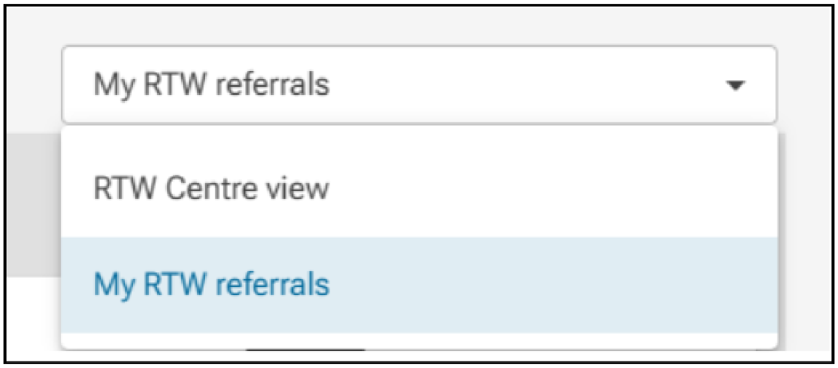
If a user is signing in and information is incorrectly entered into a field or the data entered does not exist, error messaging will display as **Unable to sign in**:

Dashboard management

Select the Dashboard view

The Dashboard screen has multiple views in CareHub and access to the different views will depend on the user role assigned. Some roles have access to multiple dashboard views. These views can be switched using the **View selection** drop-down menu located at the top-right corner of the Dashboard screen.



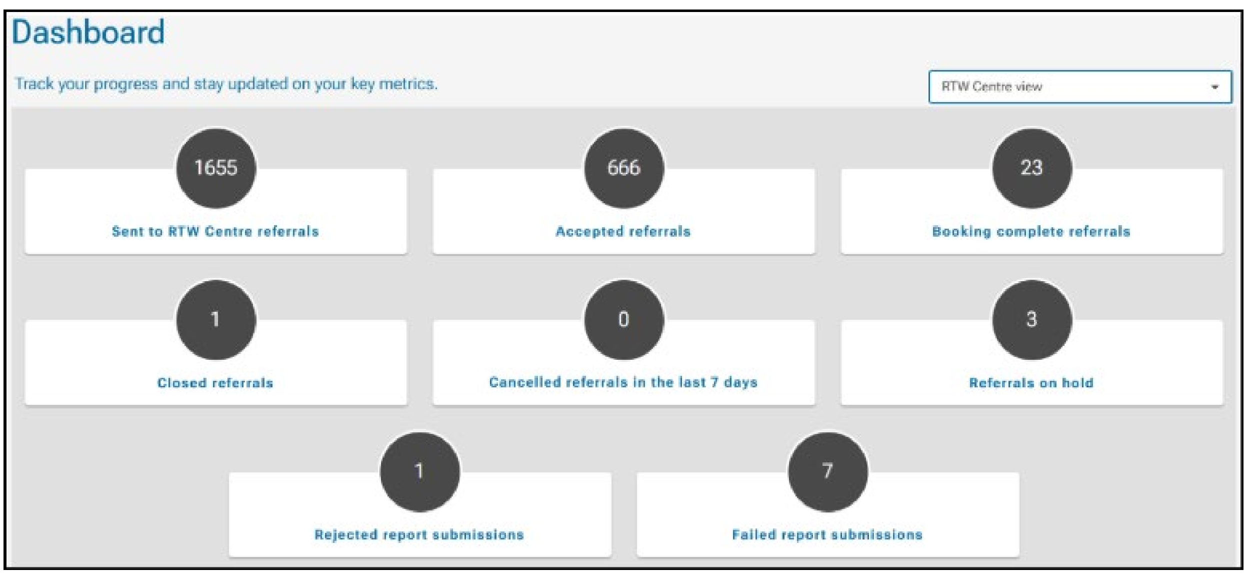


To switch the dashboard view and access other views if available, the user will select the downward arrow icon displayed next to current view title, *(i.e., My RTW referrals)* and select another option from the drop-down menu by clicking the desired dashboard view title.

- When the user clicks a new view from the listed options, the Dashboard screen will automatically update to display the newly selected view.

RTW Centre view

For users with a centre manager role, the RTW Centre view is set as the default dashboard view. Users with the intake coordinator role can also access this view by searching it from the View selection drop-down menu located on the right side of the dashboard.



The top of the RTW Centre dashboard view consists of eight dashboard cards that display clickable hyperlinks and number counts to reflect the number of referrals and reports in specific statuses.

- When a user clicks a displayed hyperlink within a dashboard card, the user will be redirected to the referral summary or the report summary screen (depending on the hyperlink selected).
- A filter will automatically be applied to the referrals or reports listed in the referral summary or report summary table – this filter will depend on the selected hyperlink.
    - *I.e., If the user clicks the Closed referrals hyperlink on the dashboard card, they will be redirected to the referral summary with a filter applied to show only referrals with Status = Closed.*

The dashboard cards shown below link to either the Referral summary or Report summary page. When users click a card, it will open the corresponding page and automatically apply filters to the summary table based on the selected card.

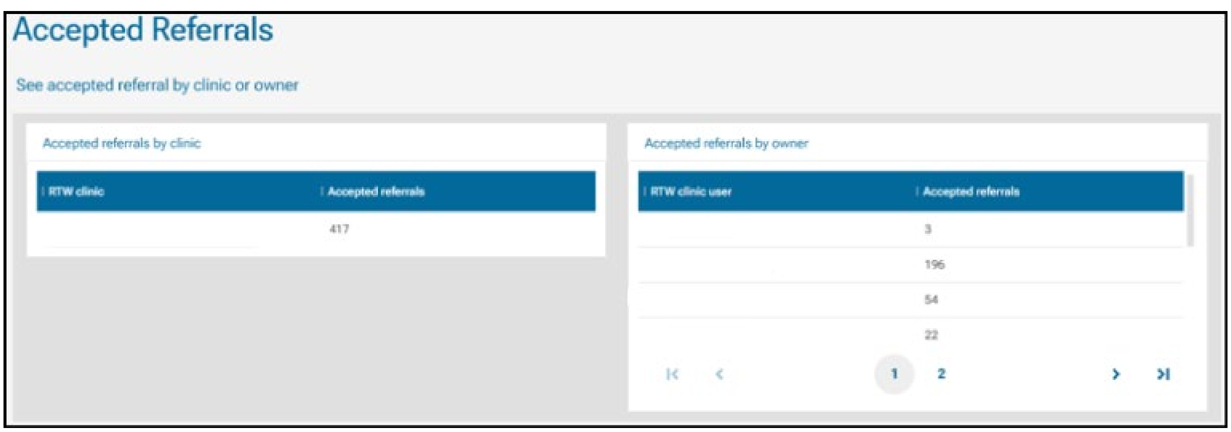
- Sent to RTW centre referrals
- Accepted referrals
- Booking complete referrals
- Closed referrals
- Referrals on hold
- Rejected report submissions
- Failed report submissions

The Cancelled referrals in the last 7 days dashboard card is not a clickable link. RTW Centre's will not have access to view referrals once they have been cancelled.

At the bottom of the RTW Centre view dashboard, the user will find a section labelled Accepted referrals. This section displays two separate tables:

- One organized by RTW clinic
- One organized by Owner

These tables provide an easy reference for viewing Accepted referrals in a structured format.



Accepted referrals by clinic

This table will list users associated with RTW clinic(s) and the total number of accepted referrals aligned with that clinic.

The RTW clinic listed, and its associated accepted referral count, is a clickable hyperlink.

- If a user with appropriate security wants to view only accepted referrals by a specific RTW clinic, they click the RTW clinic name hyperlink.
- This action will redirect the user to the Referral summary screen with applied filters:
    - *Status:* Accepted, *RTW clinic:* user's selected RTW clinic.

Accepted referrals by owner

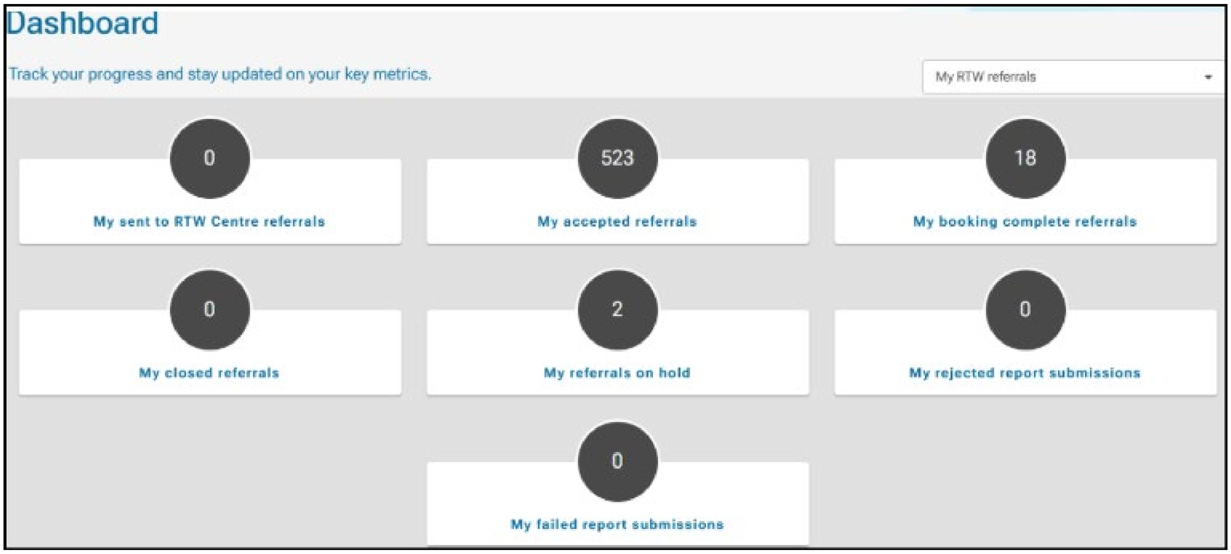
This table shows the number of accepted referrals for individual users associated with the signed in user and the RTW clinic.

- Each user's name and their accepted referral count appear as clickable hyperlinks.
- To view accepted referrals for a specific user if you have the appropriate security permissions:
    1. Click the user's name in the table.
    2. The user will be redirected to the Referral summary screen with filters applied:
        - Status: Accepted
        - Advanced Search: Referral owner

More details about the Referral summary page and available filters are available in the Referral summary section of this guide.

My RTW referrals view

For users with the intake coordinator or clinic provider roles, the My RTW referrals view will be set as the default. Users with the centre manager role can also access this view by selecting it from the View selection drop-down menu located on the right side of the dashboard.



The My RTW referrals dashboard contains seven dashboard cards. Each card displays:

- A clickable hyperlink and
- A number count showing the total referrals or reports in a specific status.

How it works

- When a user clicks a hyperlink on a dashboard card, the user will be redirected to either the **Referral summary** or **Report summary** page.
- The page will automatically apply filters based on the hyperlink selected.
- Example: By clicking My booking complete referrals, you will be taken to the Referral summary screen with the filter applied to show only the referrals with the status: Booking complete.

Dashboard cards

Clicking any of these cards will redirect the user to the appropriate summary page with filters applied:

- My sent to RTW Centre referrals
- My accepted referrals
- My booking complete referrals
- My closed referrals
- My referrals on hold
- My rejected report submissions
- My failed report submissions

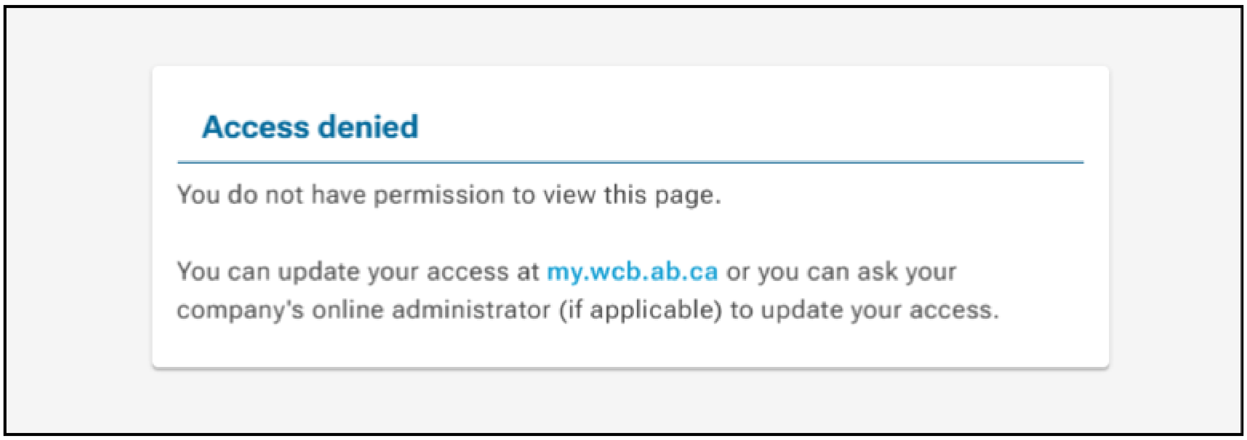
Report submission dashboard cards in the My RTW referrals view

For users with the clinic provider role:

- The **My rejected report submissions** and **My failed report submissions** cards will display the number of rejected and failed reports submitted by the user's clinic.
- Each card includes a clickable hyperlink that opens the Report summary page.

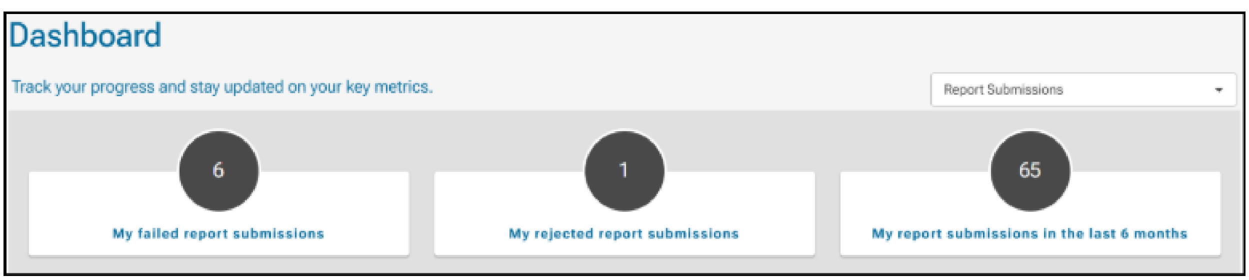
For users with the intake coordinator role:

- These two cards will still appear on the dashboard.
- However, clicking the hyperlink will display an **Access denied** message.



Report submissions view

For users with the report submitter role, the Report submission view will appear by default. Users with centre manager or clinic provider roles can also access this view by selecting it from the drop-down menu on the right.



The Report submission dashboard view consists of three dashboard cards that display clickable hyperlinks:

- My rejected report submissions

- My failed report submissions
- My report submissions in the last 6 months

When a user clicks a displayed hyperlink within a dashboard card, they will be redirected to the report summary screen, and a filter will be automatically applied to the reports listed in the report summary table – this filter depends on the selected hyperlink.

  - *Example: The user clicks My rejected report submissions hyperlink on the dashboard card and will be redirected to the report summary screen with filter applied to only show reports submitted by user with Status = Rejected*

Submitting reports from the Dashboard

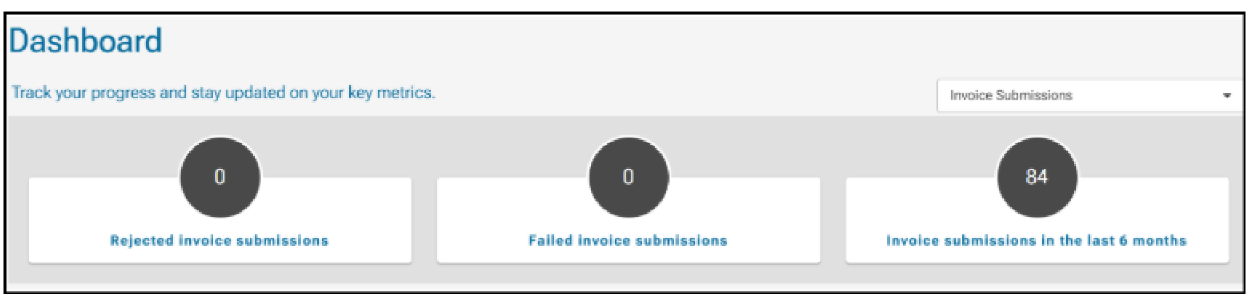
Submission of reports is not an available option for a user from the dashboard screen, however once a dashboard card hyperlink is clicked on and the user is redirected to the filtered Report summary page, they can access a Submit reports button at the top right of the summary screen.

A user assigned a role of report submitter or clinic provider will have this button displayed as these specific roles have *view* and *submit* security privileges for reports.

For more information regarding how-to submit reports, please refer to the *Submitting a report* section of the user guide.

Invoice submission view

The Invoice submission view will be the default view for users with only an Invoice submitter role. Users with a centre manager role can see the associated dashboard via the view selection drop-down menu on the right side.



Invoice submission dashboard screen

The Invoice submission dashboard view consists of three dashboard cards that display clickable hyperlinks.

Dashboard cards for this specific view are:

- Rejected invoice submissions
- Failed invoice submissions
- Invoice submissions in the last 6 months

If a user wants to filter the Invoice summary screen, clicking an Invoice submission dashboard card hyperlink will redirect them from the dashboard screen to the invoice summary page and filter the invoice summary table with the selected filter option:

Example: The user clicks the Invoice submissions in the last 6 months hyperlink on the dashboard card and is redirected to the Invoice summary screen with filter applied with custom date of six months, only invoices submitted by the user in the last six months will display.

Submitting invoices from the Dashboard

Submission of invoices is not an available option for a user from the Dashboard screen, however once a dashboard card hyperlink is selected and the user is redirected to the filtered Invoice summary page, they can access a Submit invoices button at the top right of the Summary screen.

A user assigned a role of invoice submitter will have this button displayed as this specific role has the view and submit security privileges for invoicing.

For more information regarding how-to submit invoices, please refer to the Submitting an invoice section of the user guide.

Menus

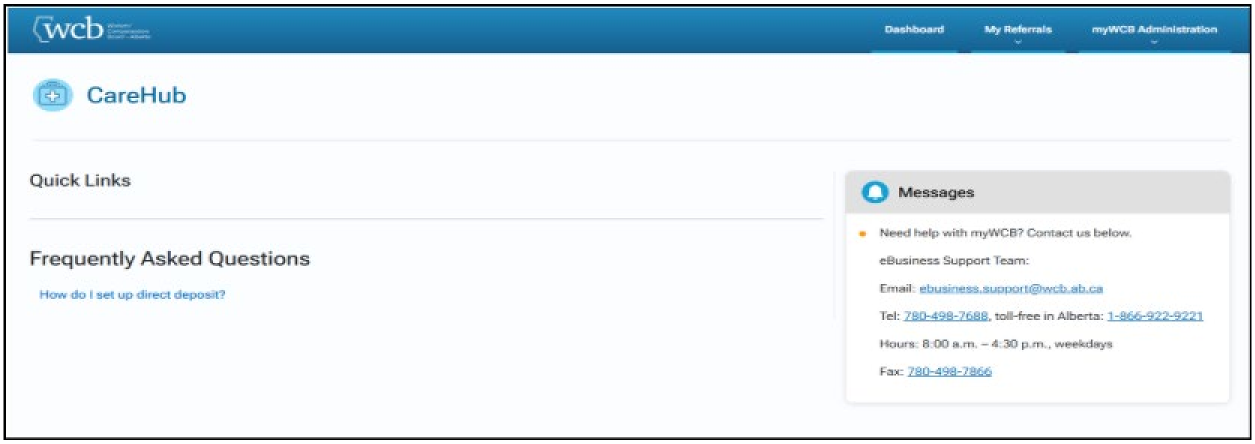
Pencil menu

The Pencil menu is the blue bar located at the top of CareHub screens, above the mega menu. This menu provides:

- a link to the myWCB landing page
- an option to sign out of the CareHub portal

Return to myWCB landing page

If the user wishes to return to the myWCB landing page while navigating CareHub, the user can select the **Return to myWCB landing page** link in the Pencil menu.



Sign out

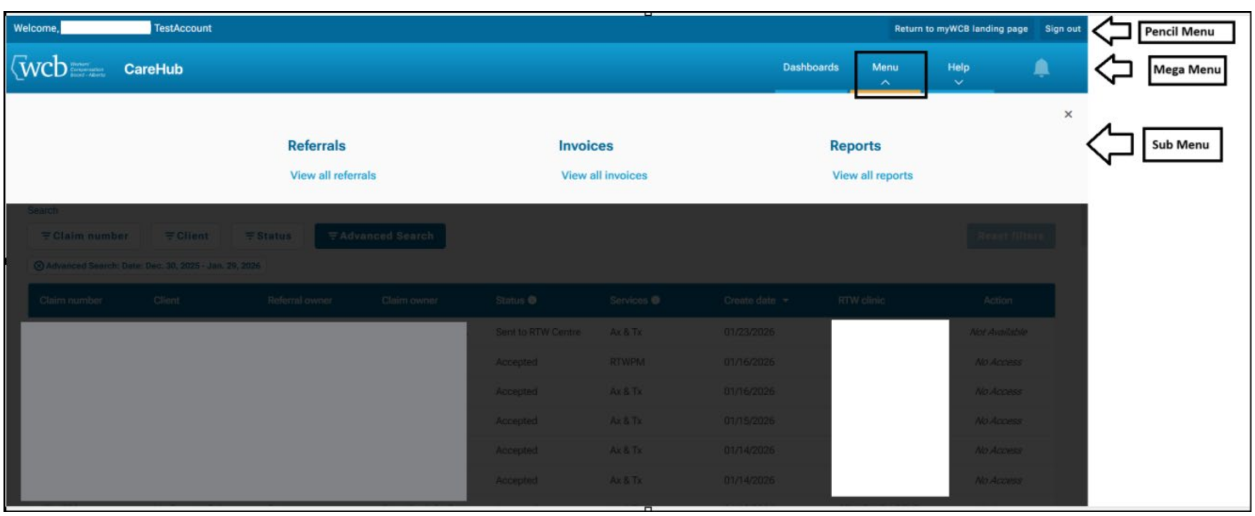
To exit CareHub:

- Click Sign out located on the far-right side of the Pencil menu.
- After signing out, you will be redirected to the myWCB Sign in page.

To regain access to CareHub, sign in using your credentials.

Mega Menu

The mega menu refers to the blue bar located at the top of CareHub screens. This menu bar includes links to access the dashboards, further options for navigating CareHub and the bell icon that allows users to access notifications.

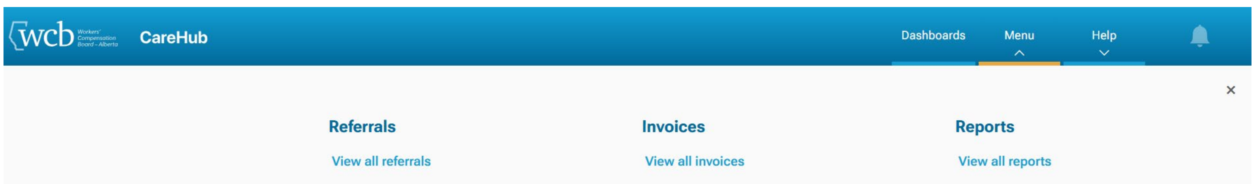


Menu

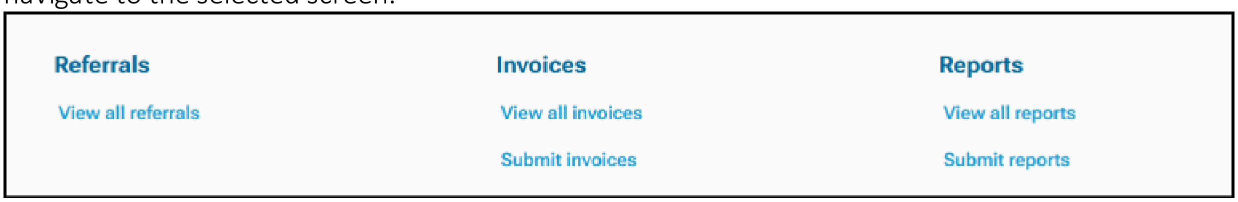
Within the mega menu, when a user selects the Menu header or the downward arrow icon displayed beneath it, a submenu will display.

The submenu provides additional menu options with hyperlinks so a user can navigate to a different screen of their choosing. These options are role dependant and will only display options that align with the security access granted:

- Referrals
- Invoices
- Reports



Below each additional menu title displayed, hyperlink options are listed. When clicked, the user can navigate to the selected screen.



Referrals

Under the Referrals menu, users with security access to the Referral summary screen will see a hyperlink labelled View all referrals.

- Click View all referrals to open the Referral summary screen.

Invoices

Under the Invoices menu, users with security access to view and/or submit invoices can access one or both of the following hyperlinks:

- View all invoices which opens the Invoice summary screen.
- Submit invoices which opens the Invoice submission screen.

Reports

Under the Reports menu, users with security access to view and/or submit reports can access one or both of the following hyperlinks:

- View all reports which opens the Report summary screen.

- Submit reports which opens the Report submission screen.

Help

Within the mega menu, there is also a Help link.

When a user selects the Help header or the downward arrow icon below it, a submenu is displayed.

The Resources submenu provides additional menu options . These options are role dependant and will only display options that align with the security access granted:

- Take a tour (Welcome Tour)
- User guide

Take a tour

A Welcome tour is available for users as an onboarding feature within CareHub, designed to guide new and returning users through the portal's key functionalities and navigation elements.

User guide (Providers)

This user guide is available under the Resources tab in the drop-down menu.

Dashboards

- Select Dashboards from the mega menu to return to the dashboard view from any screen.
- When selected, you will be taken to the Dashboard screen that corresponds to your assigned role in CareHub.

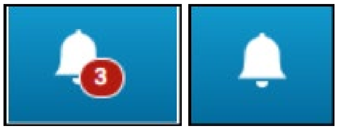
Tip: You can also click the **WCB** logo in the mega menu to return to your default dashboard.

Notifications

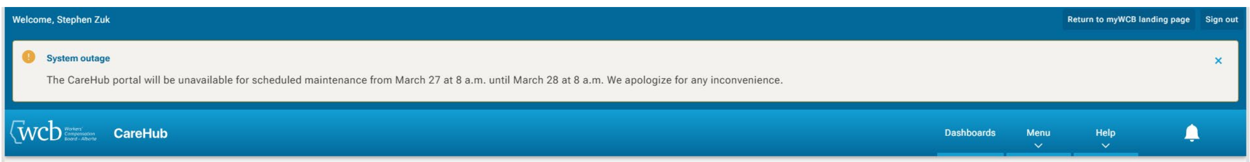
- The bell icon, displayed in the mega menu, provides access to a user's notifications.
- When the bell icon is clicked in the mega menu, the **My notifications** screen will display for

the user with appropriate notifications (if any).

- For further details regarding this option, please refer to the Notifications section of the user guide.

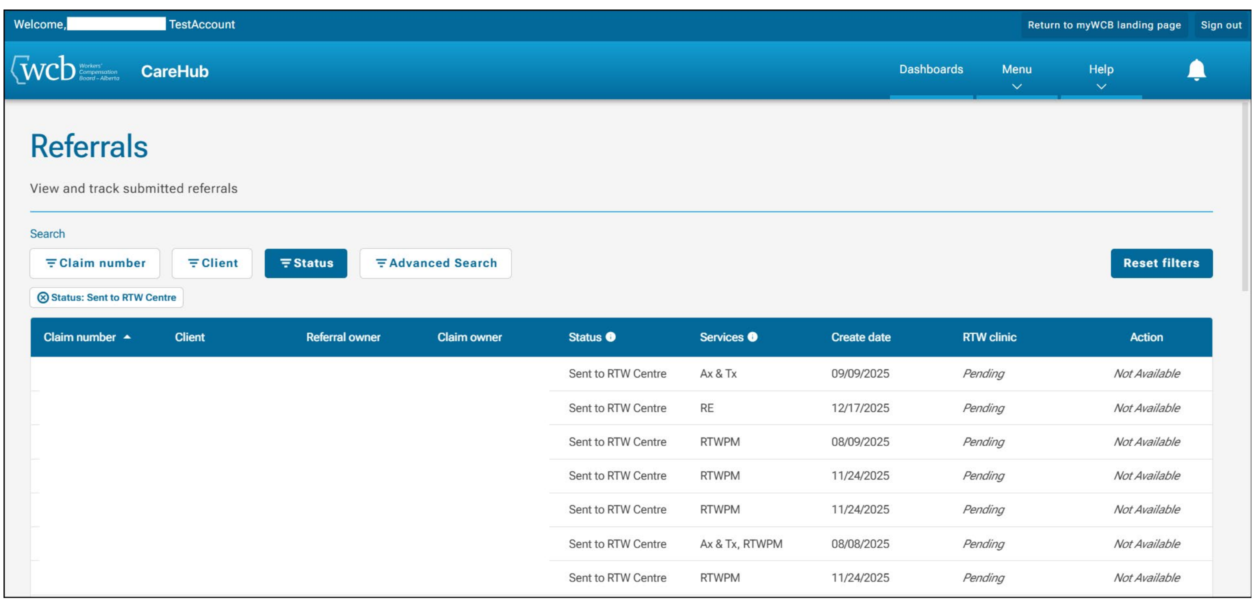


Broadcast message banner



Between the mega menu and the pencil menu, a broadcast message banner may be visible. This displays general broadcast messaging to all users (e.g., upcoming system outage).

Referrals summary page



The Referrals screen in CareHub displays a list of referrals that can be searched, sorted and filtered.

- MedPack documents can be accessed from this screen for accepted referrals.

RTW centre staff will only see referrals assigned to their own RTW clinic and have explicit access to. Double clicking on a row in the referral summary will open the referral.

Referral summary layout

The referral data displayed on this page includes the following columns:

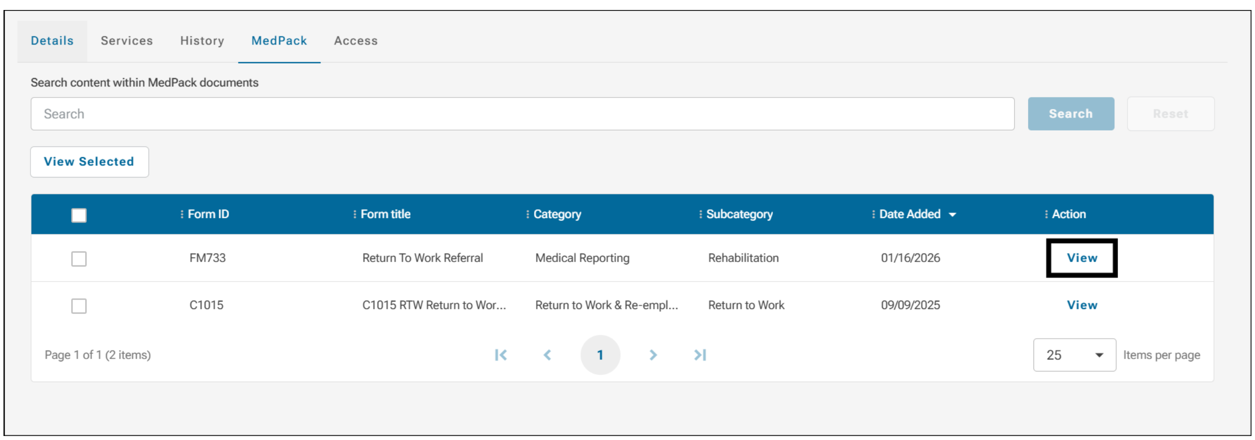
- Claim number
- Client
- Referral owner
- Claim owner
- Status
- Services
- Create date
- RTW clinic
- Action (contains a View link to MedPack documents)

Sorting:

By clicking on one of the above column headers (not including Services, RTW clinic or Action), the user **has** the ability to sort the table in ascending or descending order based on that column.

Viewing MedPack documents:

Click the View hyperlink in the Action column to open the MedPack screen for the selected referral. MedPacks are only available for referrals that have been accepted by the RTW centre. Fatality referrals will not include a MedPack.

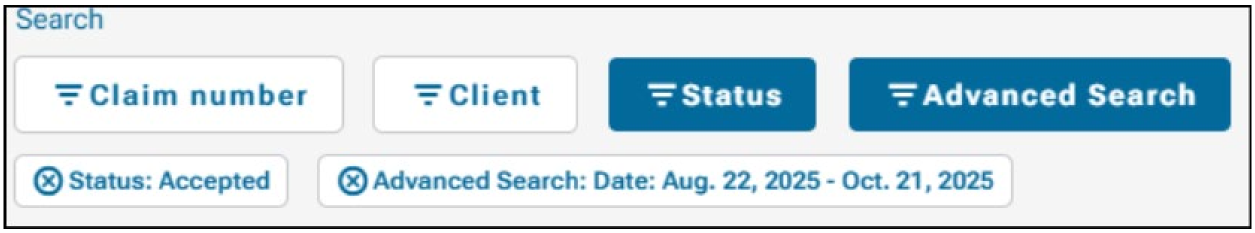


Using the referral table

When the page loads, referrals visible to the user based on their permissions will display.

Filters

- Filters can be applied directly from search modals.
- Active filters appear as **white buttons with blue text** and an **X icon** to remove them.



Sorting

Select one of the above column headers (e.g., Claim Number, Client, Status) to sort the table in ascending or descending order.

An arrow icon will appear beside the column header:

- Upward arrow = ascending order
- Downward arrow = descending order

Search options

Click Claim number, enter the claim number then click Search. Close the window by clicking X.

Click Client, enter the client's name then click Search. Close the window by clicking X.

Click Status, select one or more statuses (e.g., Draft, Accepted, Closed) then click Search. Close the window by clicking X.

Click the Advanced Search button to open the modal. You can search by:

- Referral owner
- Claim owner
- Referral date (Last seven Days, last 60 Days, or custom range – cannot exceed 365 days)
    - For custom dates, use the From and To calendar selections. Click Search to apply or Cancel to exit.

Click Reset filters to remove all filters and reset the table view.

Referral details

The Referral details tab contains relevant information that RTW Centres can use to determine which RTW services are appropriate for a worker.
The referrals received will be in Edit submitted referral view and will allow for editing of some displayed fields by the RTW Centre users with access to the referral(s).

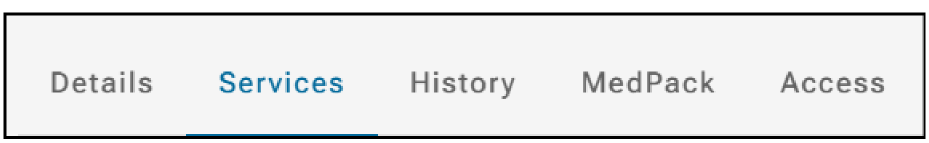
Referral banner

Once the user has selected a referral for review, the Referral banner will provide:

- Claim number / referral number
- Claim owner name
- Claim owner email / phone number
- Date of Accident
- Referral submitted date

If the primary contact information differs from the Claim owner, additional contact information will be added.

Referral tabs and functions



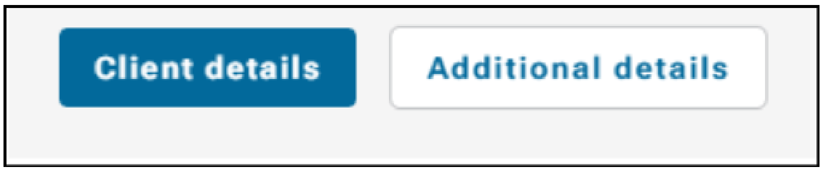
Users can view multiple tabs within a referral, with each tab providing different information.

Below is a list of the different tabs within a referral, followed by in-depth information on what's available in each individual tab and what functions they provide.

- Details
- Services
- History
- MedPack
- Access

Details

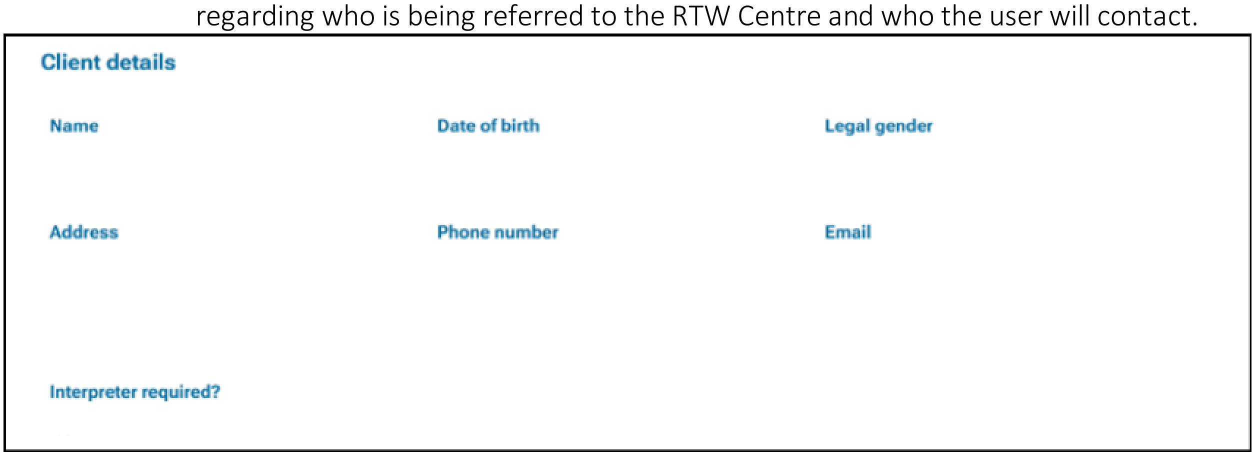
The Details tab is split into two separate tabs within its section – one is labelled **Client details** and the other tab is **Additional details**. These sections can be utilized in different ways to support a user's decision-making about services scheduled, appropriate next steps, appropriate contacts, etc.



Information found within **Client details:**

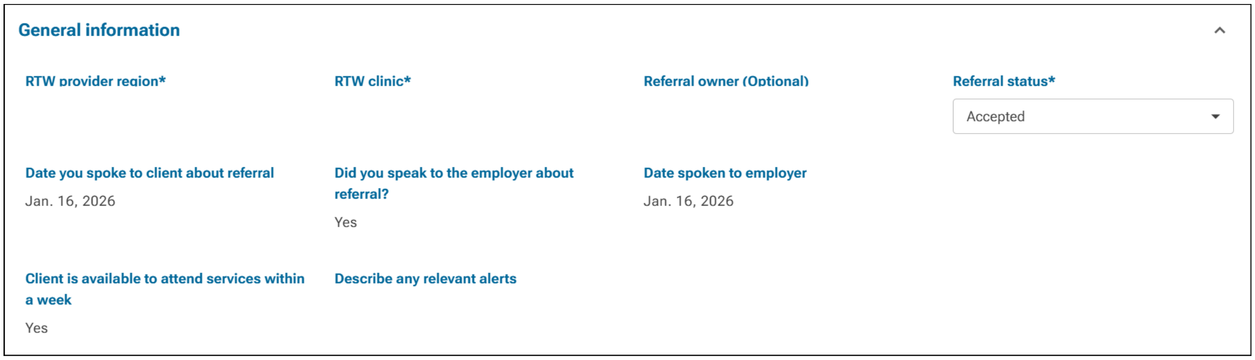
- Client details
- General information
- Injury
- Services

- **Client details** – includes important details regarding the worker being referred and can assist users in determining appropriate geographic location, interpreter requirements and contact details for scheduling requested services.
  - This section supports the user scheduling the services to gather important details regarding who is being referred to the RTW Centre and who the user will contact.



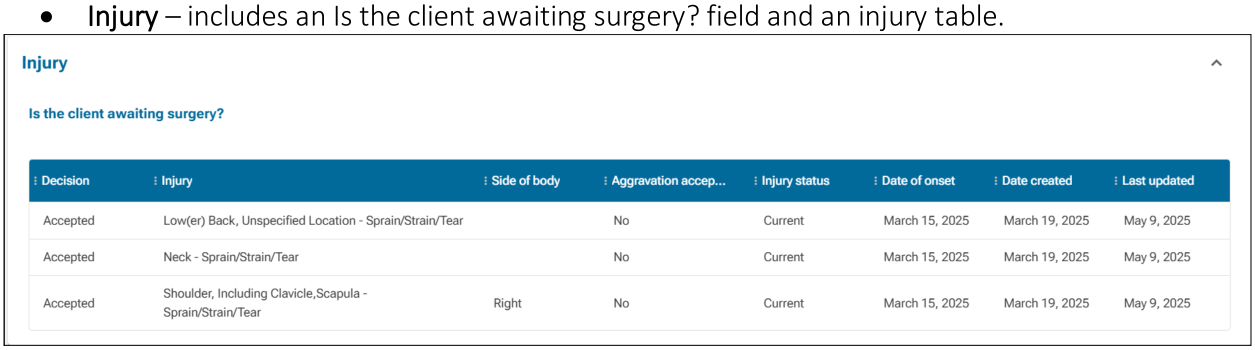
  - This section will also confirm:
    - The referred worker is of age and can be contacted directly
    - What language the worker prefers to communicate with to help determine if an interpreter is required
    - That the worker has been referred to the appropriate geographic RTW Centre location for services *(Address)*
  - Users cannot edit this section

- **General information** – includes details for the selected RTW provider region and allows users to select an appropriate RTW clinic, assigns a user as the referral owner and updates the referral status.



  - Drop-down selections and changes can be made in the RTW clinic, Referral owner and Referral status fields.
  - Users can select the downward arrow icon to display a drop-down menu for each editable field.
    - Click an option displayed in the drop-down menu to populate the corresponding field.
    - If the user selection for Referral owner is not listed in the drop-down menu, type a specific user's name next to the magnifying glass icon in the drop-down menu to search for them. (*Only users with access to that clinic will be displayed. If a user is still not found, they will need to be added to that clinic before their name will be displayed.)*
      - Click the displayed search data to populate in the **Referral owner** field.
    - Click the Save changes button to save any changes to the listed fields.

- **Injury** – includes an Is the client awaiting surgery? field and an injury table.

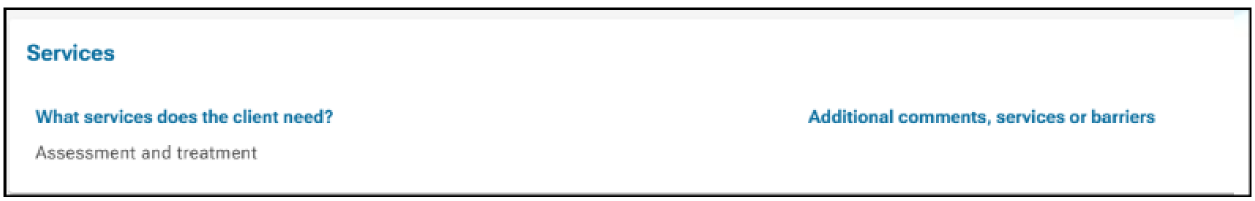


Decision	Injury	Side of body	Aggravation accep...	Injury status	Date of onset	Date created	Last updated
Accepted	Low(er) Back, Unspecified Location - Sprain/Strain/Tear		No	Current	March 15, 2025	March 19, 2025	May 9, 2025
Accepted	Neck - Sprain/Strain/Tear		No	Current	March 15, 2025	March 19, 2025	May 9, 2025
Accepted	Shoulder, Including Clavicle,Scapula - Sprain/Strain/Tear	Right	No	Current	March 15, 2025	March 19, 2025	May 9, 2025

  - The injury table will include all injury decisions for user reference:
    - Accepted: A decision has been made to accept the injury.
    - Not Accepted: A decision has been made to not accept the injury.
    - Pending: A decision on the acceptability of the injury has not yet been made.
    - Medical Investigation: A decision has been made to accept the injury on a medical investigation basis so the claim owner can issue wage replacement benefits to the claimant while they complete the investigation.

        - Aggravation injuries may show the decision as “Not Accepted”; however, the entitlement of a temporary or permanent aggravation acceptance may show “Yes”.
    - The injury table will include the Injury Status:
        - Current: An injury that requires management, and the worker has not returned to work.
        - Resolved: The worker has made a full recovery from their injury.
        - Recurrent: An injury directly related to a previously stabilized, compensable condition.
        - Ongoing: An injury that requires management or won’t allow for a full recovery, but the worker has returned to work.
    - Users cannot edit this section.
    - Use the injury table to determine appropriate services that best align with accepted injuries (brain injury, back, shoulder, COVID, etc.).

- **Services** – includes the services being requested by the referring claim owner or WCB team desk.



    - This information will help users decide on the appropriate service(s) for the referred worker.
        - A field labelled **Additional comments, services or barriers** will be displayed so users have data to further support determining appropriate. services, if data is available.
        - Users cannot edit this section.

Information found within **Additional details:**

- **Employment** – includes details for insured employers, modified work contact details and information, and the worker’s employment details.

Employment

Employer	**Industry** CITIES (95104)	**Address** ,	
Employer contact name	**Employer contact phone number**	**Employer contact extension**	**Employer contact email**
Modified work contact name	**Modified work contact phone number**	**Modified work contact extension**	**Modified work contact email**
Date of hire March 14, 2005	**Date of retirement** Feb. 28, 2037	**Client job attached** Yes	**Employment end date**
Occupation category Technical Occupations Related to Natural and Applied Sciences	**NOC and occupation** 2263 - Inspectors in Public and Environmental Health and Occupational Health and Safety	**Job descriptions and duties** Municipal Waste Inspector I	**Job classification**

Is modified work available?

Is client currently working?
No

Does the client have any concurrent employers?
No

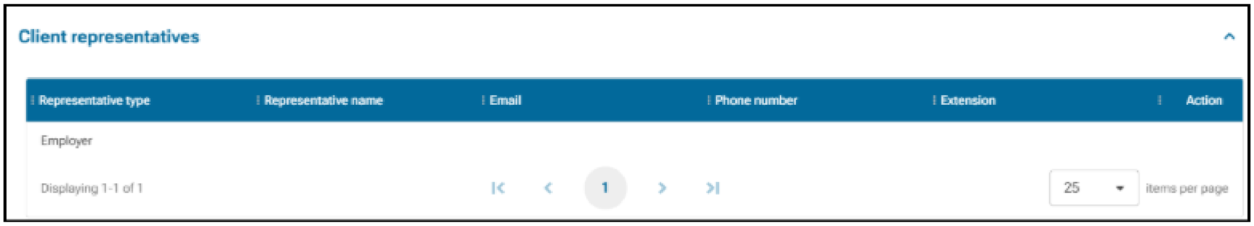
DOA occupation
jerb

Does the employer have any concerns with the claim?
No

Additional comments and special circumstances

- This section can be used to schedule certain services by:
  - Ensuring correct contact is made when arranging return-to-work planning meetings.
  - Referring to the modified work details during program services for consideration when arranging a program schedule.
  - Reviewing employment details for a worker if attending re-employment services to provide further details, determine next steps, etc.
- Users cannot edit this section.

- **Client representatives** – includes a Client representatives table that provides information about types of representatives and contact details.



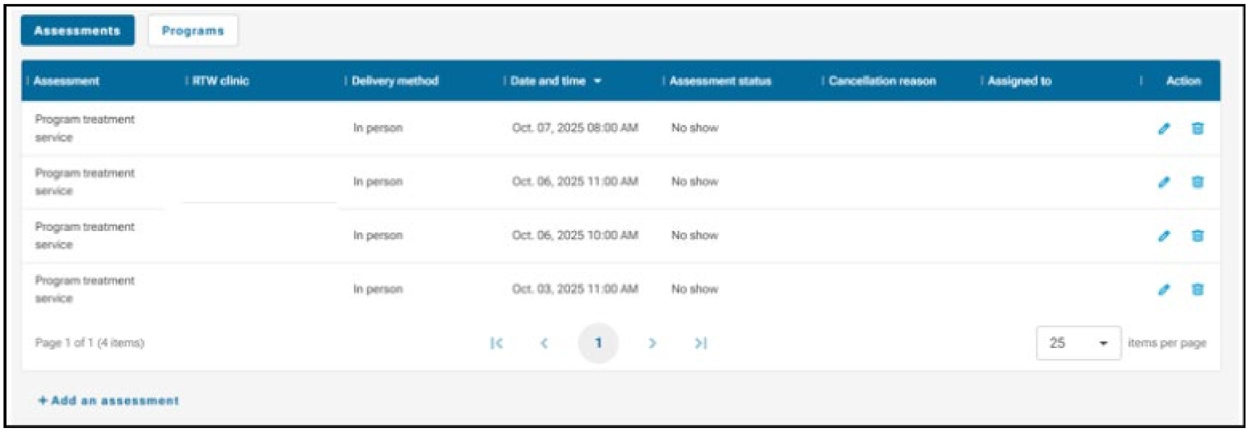
- Use the representative table data to determine appropriate contact when needing to contact the worker, employer or union representative.
  - **Employer representative** data identifies the appropriate contact when communicating with the insured.
  - **Client representative** data helps ensure the user contacts the correct client representative, such as *when the worker prefers not to be contacted directly.*
  - **Union representative** data helps ensure the user contacts the appropriate union representative when their presence is requested, such as *for return-to-work planning meetings.*
  - User cannot edit this section.

- **Re-employment** – includes important information to reference if the worker will be attending re-employment services to help determine appropriate services and next steps in their re-employment journey.

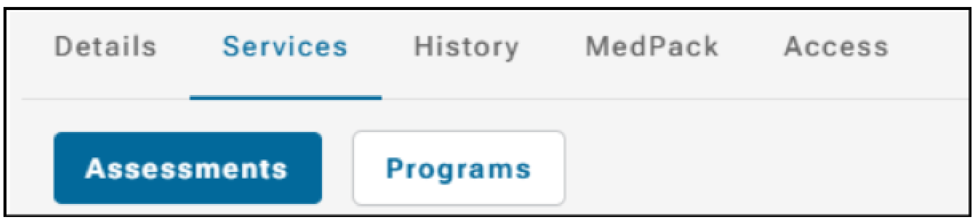
  - **Please note:** some fields display only if the correct response to the field's prompts the hidden fields to be displayed.
    - Hidden fields include the *reason why the client is not able to participate* and *retroactive date.*
  - **Fatal claims only:** this field will display data for the widowed person's gainful employment earnings goal.
  - User cannot edit this section.

Services

The Services tab contains information regarding assessment and program services scheduled by RTW Centres.



The Assessments services table and the Programs services table will be separated with filter buttons within the Services tab.



Accessing the services tables:

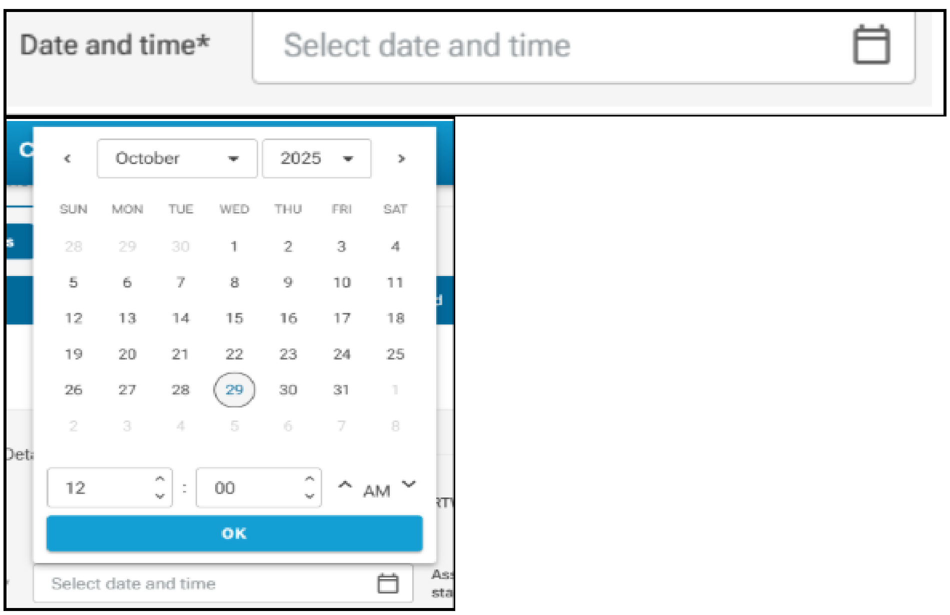
- The Assessments services table is the default screen to the Services tab.
- To access the Programs services table, users select the Programs button displayed at the top of the services table.
- To return to the Assessments services table from the Programs table, the user clicks the Assessments button.

Adding assessments manually in the Services table will be disabled for RTW Centres. Users are encouraged to reach out to their administrator if they feel they should have access to manually add assessments.

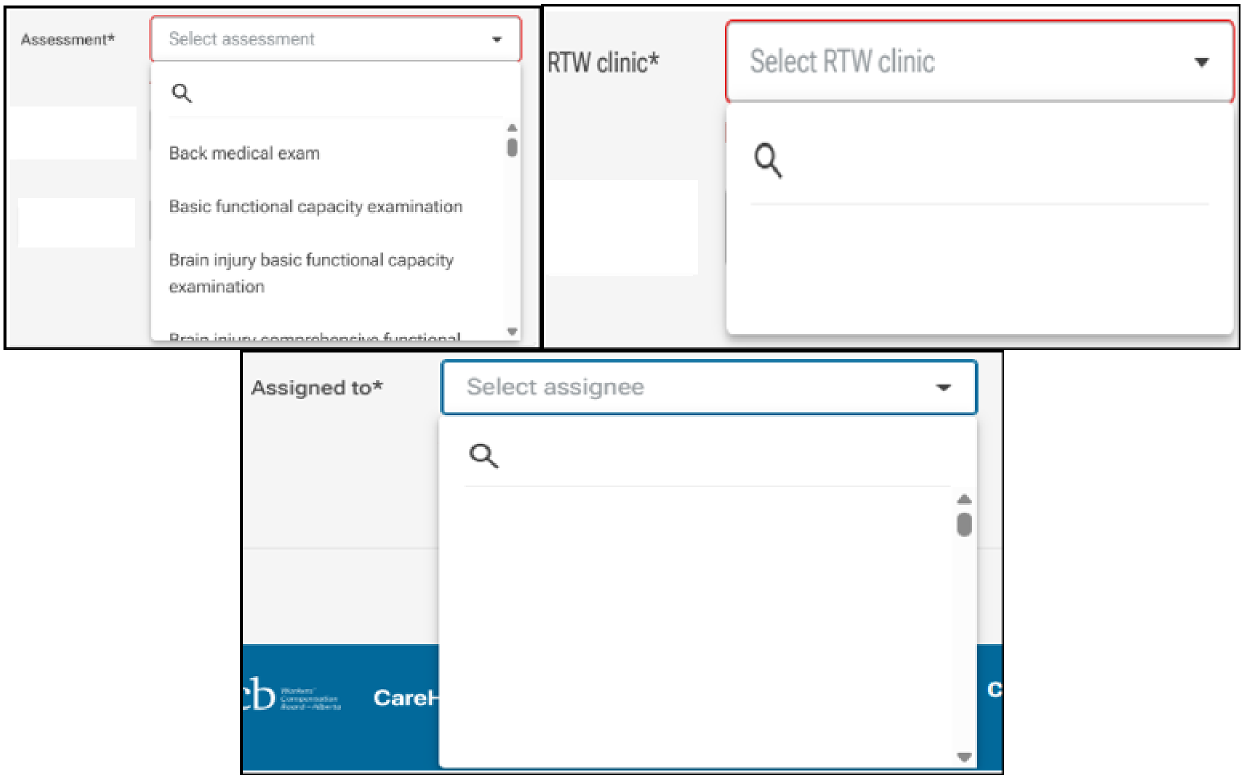
For users with access to add assessments manually to the Services table:

- The RTW Centre must accept the referral to manually add an assessment service
    - Within the Services tab, the user navigates to the bottom of the services table, where the + Add an assessment hyperlink is displayed.
    - Click the + Add an assessment hyperlink to open the Assessment details section.
    - In the Assessment details section, five required fields will be displayed:
        - Assessment
        - RTW clinic
        - Delivery method (in-person, virtual or off-site)
        - Date and time (of scheduled assessment)

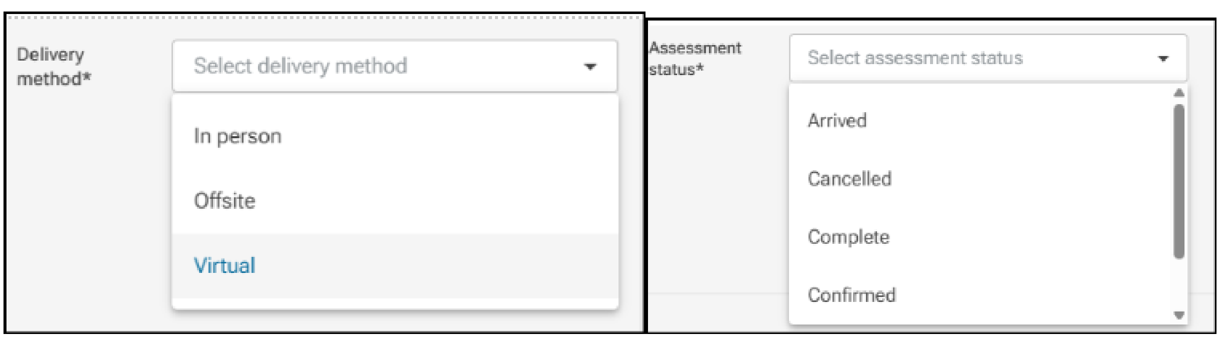
        - Assessment status (Arrived, Cancelled, Complete, Confirmed, No Show)
        - Assigned to (RTW Centre user providing the scheduled service)
- Date and time field will display a calendar icon in the blank field.
    - Users select the calendar icon to display a date/time selection and can choose a date by clicking it.
        - *If changing the month and/or year is also required, the user can change these within this window at the top, utilizing the downward arrow icons in the month and year fields.*
    - Time selection can be made at the bottom of the date/time selection window, by using the up or down arrow in the hour, minute and AM/PM fields.
    - User selects the OK button to save selections into Date and time field.



- **Assessment**, **RTW Clinic** and **Assigned to** fields display downward arrow icons:
    - Click the downward arrow icon in each field to display a drop-down menu with options for populating blank fields.
    - These fields display a magnifying glass icon at the top of each drop-down menu – if users cannot find an option in the displayed list, they can type data next to magnifying glass icon to search.
    - Clicking data in the drop-down menus will populate the data into the blank field.

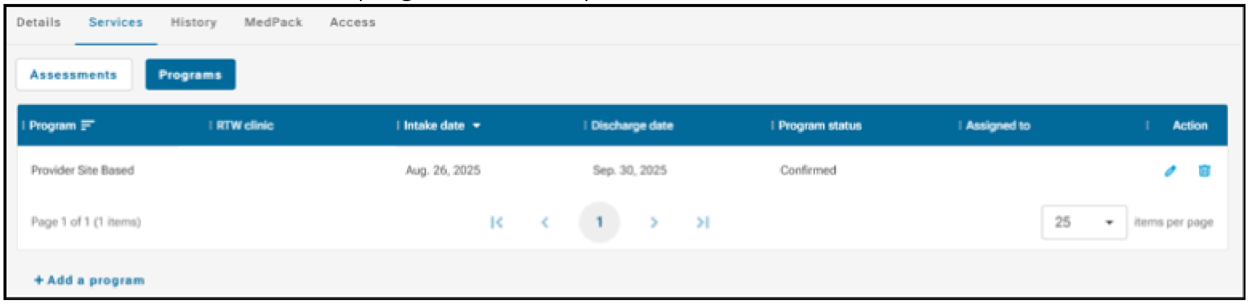


- ○ **Delivery method** and **Assessment status** fields will display downward arrow icons
  - ▪ Click the downward arrow icon in each field to display a drop-down menu with options for populating blank fields.
  - ▪ Clicking data in the drop-down menus will populate that data into the blank field.
- ○ Once information has been put into each required field:
  - ▪ Click the **Save** button – when clicked, all data added is saved and assessment details will display in the Services table.
  - ▪ Click the **Cancel** button – when clicked, all data is erased and does not save.



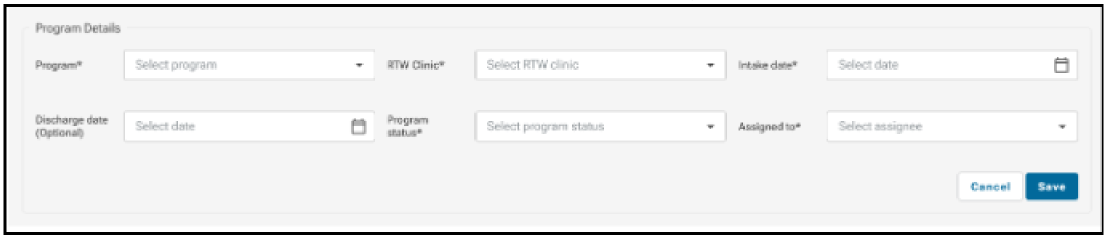
Adding programs manually in the Services table will be disabled for RTW Centres. Users are encouraged to reach out to their administrator if they feel they should have access to manually add assessments.

For users with access to add programs manually to the Services table:



- The RTW Centre must accept the referral to enable the ability to manually add a program service.
- In the Services tab, select the Programs button at the top of the page to display the programs service table.
- In this screen, scroll to the bottom of the programs services table to the + Add a program hyperlink.
- Click the hyperlink to open the Program details section.
- In the Program details section, five required fields and one optional field will be displayed:
  - Program RTW clinic
  - Intake date
  - Discharge date
  - Program status (*Active* or *Discharged*)
  - Assigned to (*RTW Centre user providing the scheduled program service*)
- **Intake date** and **Discharge date** fields will display a calendar icon in the blank field
  - Select the calendar icon by clicking it to display a date selection. They can choose a displayed date by clicking it.
    - *If changing the month and/or year is also required, users can change these within this window at the top, utilizing the downward arrow icons in the month and year fields.*
- Program, RTW Clinic and Assigned to fields will display downward arrow icons
  - Click the downward arrow icon in each field to display a drop-down menu with options for populating blank fields.
  - These fields will display a magnifying glass icon at the top of each drop-down menu – if users cannot find an option in the displayed list, they can type data next to the magnifying glass icon to search.
  - Clicking data in the drop-down menu will populate the clicked data into the blank field.
- The Program status field displays a downward arrow icon.
  - Click the downward arrow icon in the field to display a drop-down menu with options to populate into the blank field.
  - Clicking data in the drop-down menu will populate it into the blank field.
- Once information has been put into each required field:

- Click the **Save** button – when clicked, all data added is saved and program details will display in the services table.
- Click the **Cancel** button – when clicked, all data is erased and does not save.



Manually deleting services from the Services table will be disabled for RTW Centres. Users are encouraged to reach out to their administrator if they feel they should have access to manually remove assessment in CareHub.

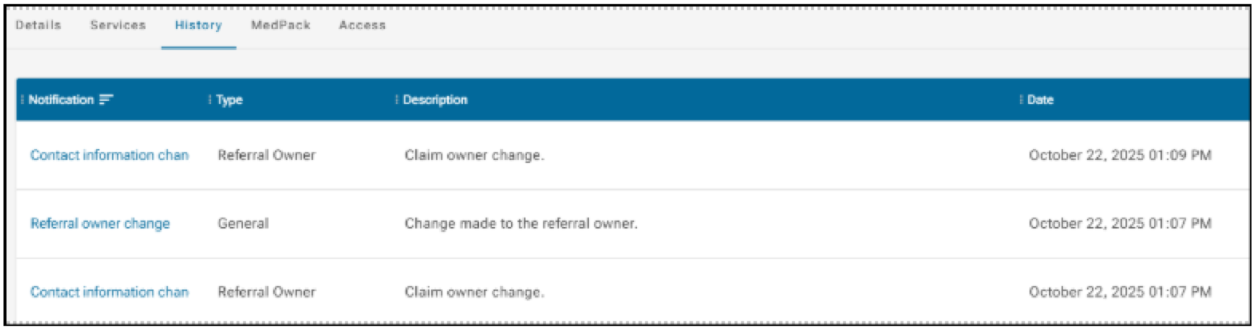
Users with access to manually delete a service from the services table:

- To delete a service displayed in the Assessments or Programs services tables, navigate to the Action column of the services table and then to the corresponding scheduled service.
- Both a pencil icon and a garbage can icon will be displayed in the Action column.

- Pencil icon = Edit – if a user needs to edit data on a service added and displayed in the services table, click the pencil/edit icon to re-open the assessment/program details section to allow editing of each field.
  - Users will need to click the Save button to save any edits made.
- Garbage can icon = Delete – to delete the service added and displayed in the services table, click the garbage can/delete icon. A confirmation pop-up message will appear.
  - If the user wants to delete the information, they can select the Delete button in the pop-up message.
  - To keep the service booking and stop the deletion process, select the Cancel button.

History

The History tab will display a table with the notification history and general referral update history.



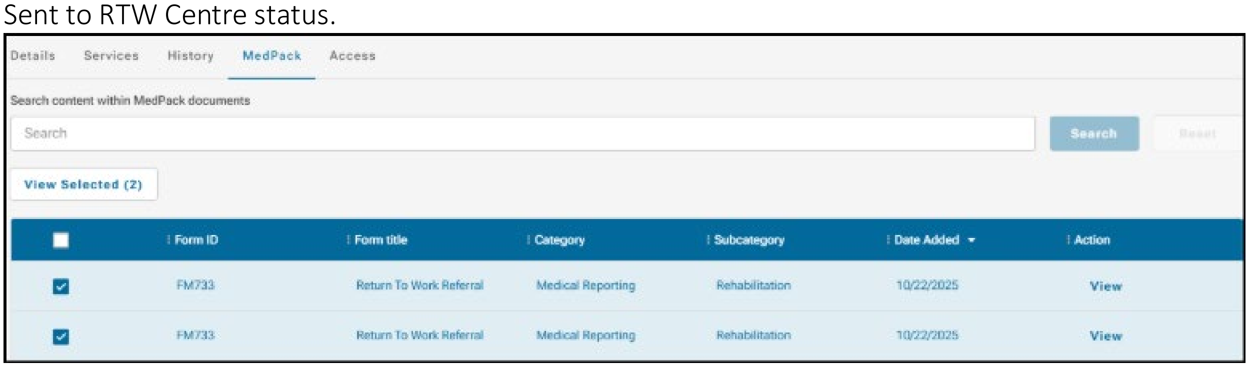
The history table is not editable for users, as the data is automatically added. Use it as an informative tool to track updates and changes.

- If a user does not receive a notification via the bell icon/notifications window, the notification will also be located in the history table.
    - Notifications not displayed in the My Notifications window are considered low priority and will only display in this table.
- If a user makes an update that notifies the claim owner on the referral, the notification will appear in this table.
- Each column in the history table can be sorted by ascending or descending order.
    - To sort, click the column header.
    - Sort order will be displayed next to the column header name with an upward arrow or downward arrow (ascending or descending).
    - Subsequent clicks to the column headers will resort in ascending or descending order.

MedPack

The MedPack tab displays a list of redacted PDF documents in a table which provides relevant medical information on the worker to the RTW Centre user with the appropriate access.

Referrals must first be accepted in order to view the MedPack documents and cannot remain in the Sent to RTW Centre status.



- Selecting and viewing MedPack documents:
    - In the MedPack document table, select multiple documents by clicking the checkbox icon on the left side of the table for the documents the user would like to view.

    - At the top of the MedPack document table, a View selected (x) button will be displayed – the number displayed in the brackets will reflect the number of documents the user has selected.
    - To view the selected documents, click the View selected (x) button.
    - When the View selected (x) button is clicked, the selected documents will open as PDF documents in a new window.
    - To view a single document, repeat the above steps or navigate to the Action column of the MedPack table and select the View hyperlink that aligns with the desired document.

- Search MedPack documents

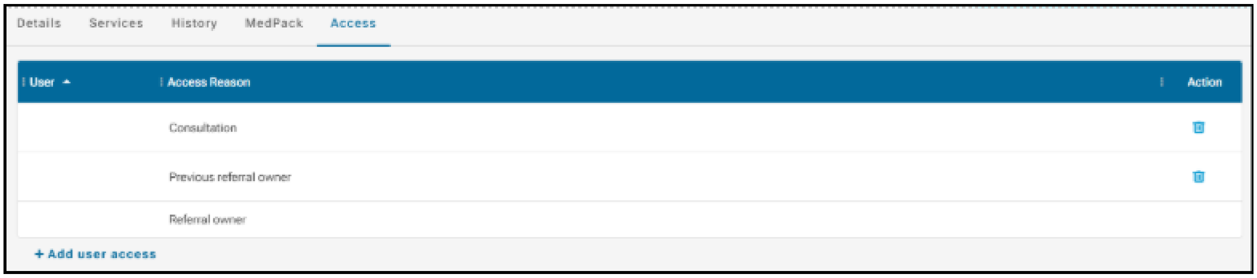
    - The Search bar for the MedPack documents is located at the top of the MedPack tab:
        - Type a keyword into the search bar and click the Search button.
        - When Search is clicked, all documents that match the search criteria will appear in the MedPack document table.
        - When Search is applied, the Reset button, next to the Search button, will be enabled.
        - Users can click the Reset button to clear a previous search.

If users experience an error when trying to access the MedPack, the following are common issues they may encounter:

- Redaction errors
    - If a document fails to redact properly, it will not be available for review.
    - If a document is only partially redacted, some pages may still be viewable, while any pages that failed redaction will appear as blank.
    - WCB will be notified of these issues and will work to resolve them. Once the issue has been resolved, the MedPack will update, and the error will be removed.
- Access-related issues
    - The user does not have access to view MedPack documents.
    - The user has not been added to the User Access table in the Referral Access tab.
- There are no MedPack documents on the claim.
- The claim is a fatality claim – MedPacks are not generated for these claims.

Access

The Access tab of a referral displays an access table that lists all users with access to the referral currently and provides an Access reason for each user listed.
Users can be manually added or automatically added, depending on their role.



How to add a user to the access table *automatically*:

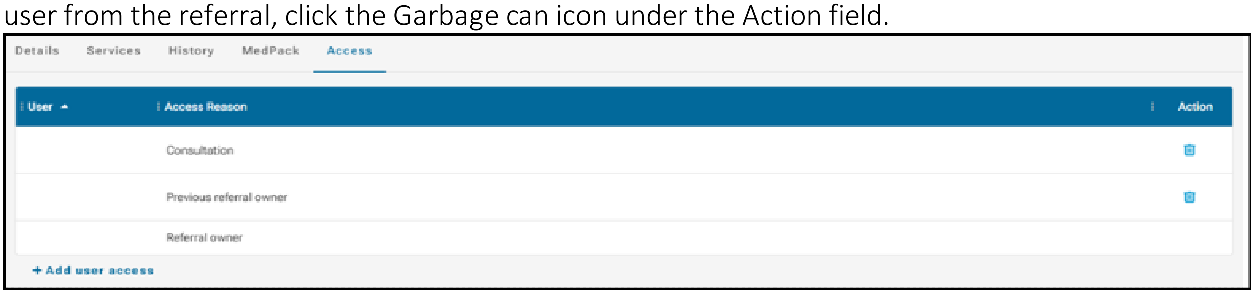
- Users assigned as the Referral owner or assigned to a service they are providing will be added automatically to the Access table.
- How to assign a referral owner or an assigned assessor is covered under the General Information and Services sections.

How to add a user to the access table *manually:*

- Navigate to the bottom of the access table and select the +Add user access hyperlink.
  - When this hyperlink is selected, the user details section displays.
- Select the downward arrow in the User field to find the user's name in the drop-down menu or by typing their name next to the magnifying glass icon.
  - Click the displayed user's name to populate selection into User field.
- Select the downward arrow in Access reason field and select a listed option in the drop-down menu .
- Click the Save button in the bottom right corner to save access selections.
  - Users added to the access table are granted access to the referral.

Remove user access

User access should be removed when users no longer have an active role in the referral. To remove a user from the referral, click the Garbage can icon under the Action field.

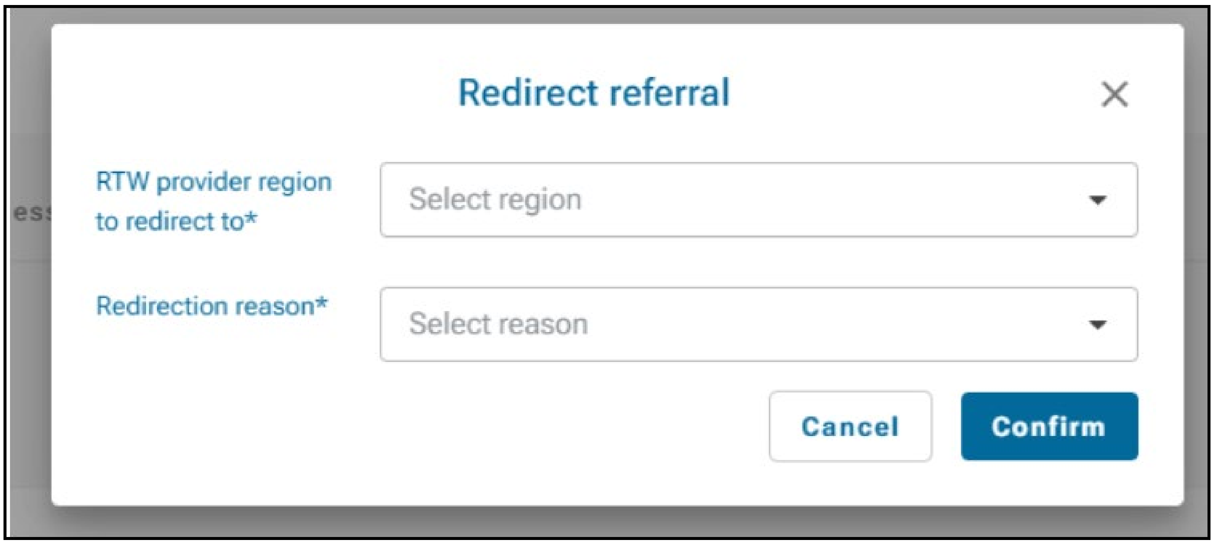


Referral redirection

The Redirect referral button is displayed in the Client details tab of the referral details screens. It is only displayed for users assigned a security role of intake coordinator or centre manager, otherwise the button will be hidden.

When a user selects the Redirect referral button, a pop-up message appears requiring two fields to be completed before proceeding. The pop-up message displays the following mandatory fields:

- RTW provider region to redirect to
- Redirection reason



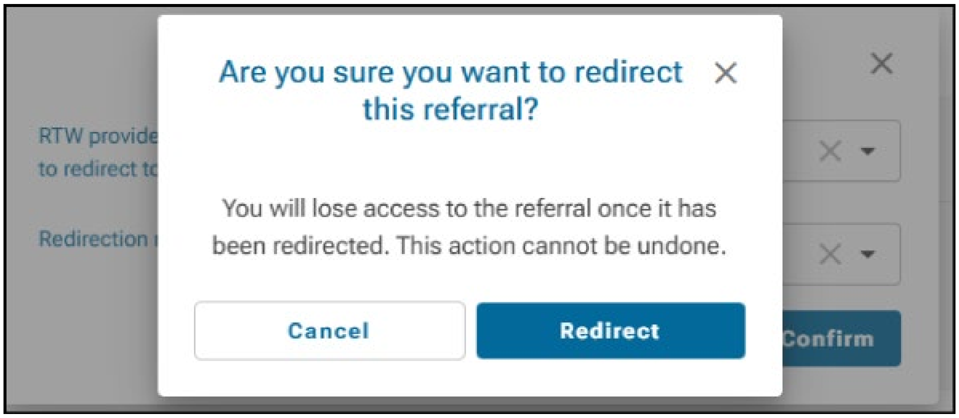
Populate each mandatory field to redirect the referral.

- Click the downward arrow icons in each field to display a drop-down menu with appropriate options.
- To choose a selection, click on a listed option displayed in the drop-down menu(s). This selection will populate the field corresponding to the drop-down menu.

Button options for redirect referral pop-up

When users click the Cancel button, the redirect referral window closes, and the referral remains with user's RTW Clinic.

- When users click the Confirm button a secondary pop-up confirmation message is generated for the redirect.

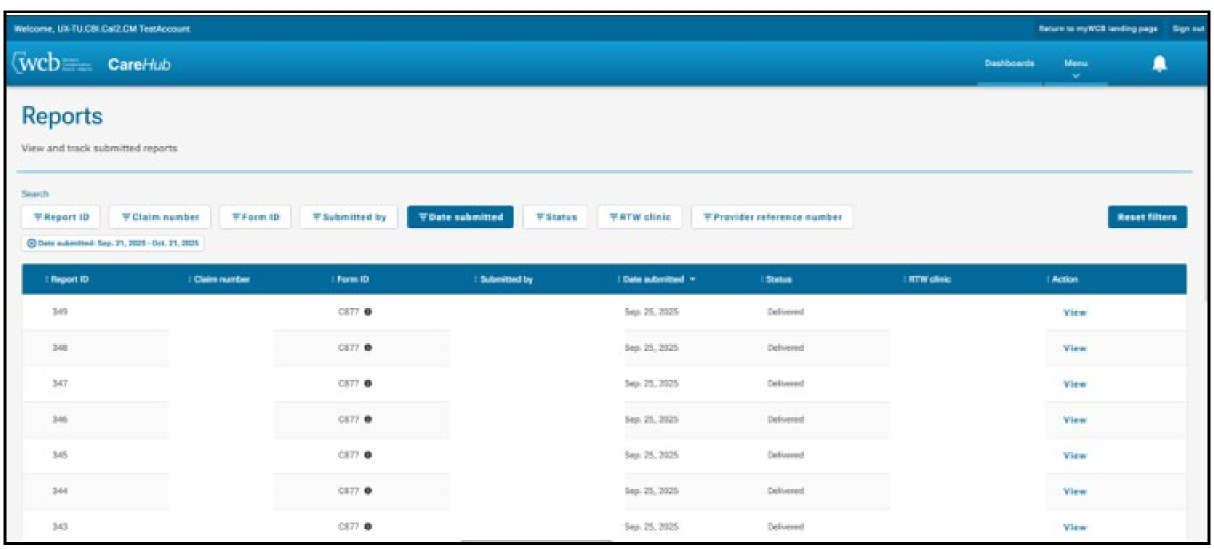


Redirect referral confirmation

When a user selects Confirm in the *first* redirect referral pop-up message, a *second* pop-up message will display reconfirming the redirection with the user.

- If users click the Redirect button in the second pop-up message, the referral will redirect and return the user to the Referral summary screen. **Access to the referral will now be lost.**
- If users click the Cancel button, it will cancel the redirection and close the pop-up windows. Users will be returned to the referral details screen with no changes saved.

Report summary screen



The Report summary screen allows RTW centre and internal WCB users to view report submissions and access submitted PDF reports.

RTW centre users can only view reports submitted by their own centre. Access is restricted to specific roles. A reference number can be seen by hovering over an **i** icon next to the Report ID.

Report summary layout

Report information includes:

- Report ID
- Claim number
- Form ID
- Submitted by
- Date submitted
- Status
- RTW clinic

The View hyperlink opens the submitted PDF report for the selected record in a new tab. For failed or rejected submissions, the error type and description identifies the reason for failure or rejection.

Using the report summary table

Only reports that the user has permission to view will be displayed. Permissions are based on the user's role.

Filters can be applied using the search buttons.

Active search filters appear as white buttons with blue text and an X to remove them.

Sorting

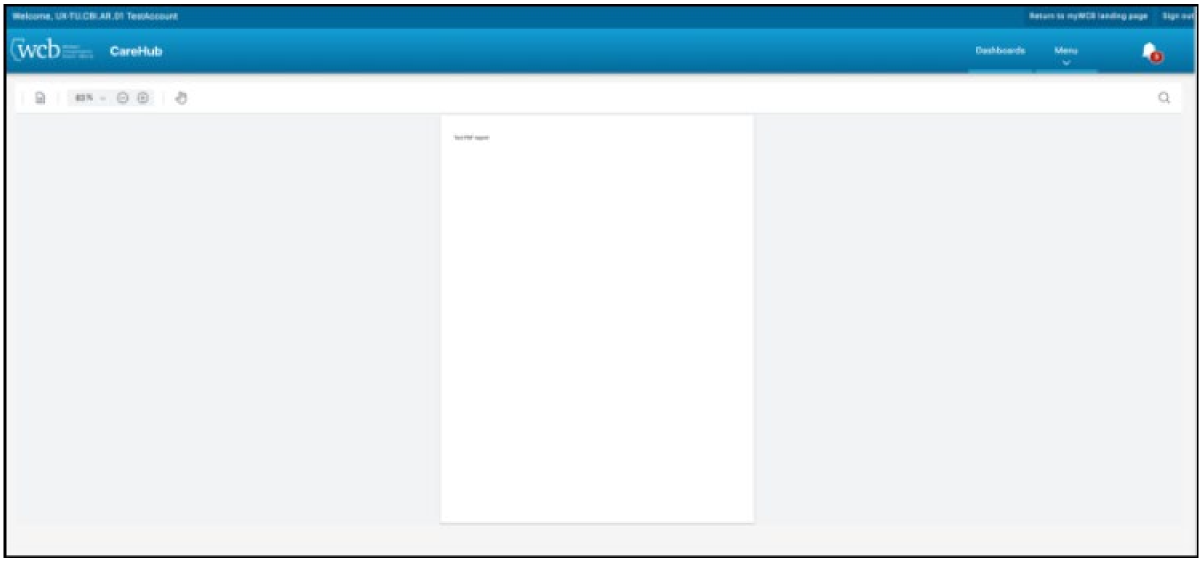
Clicking on a column header (e.g., Claim Number, Form ID, Status) allows the user to sort in ascending or descending order.

Arrow indicators show sort order:

- upward arrow = ascending
- downward arrow = descending

Report actions

The View hyperlink opens the report PDF in a new tab.



The **Dismiss** hyperlink allows a user to remove Rejected or Failed reports from the table view. Dismissing does not permanently delete the report from the system, only hiding it from the view.

Search options

Search by Report ID:

- Click the Report ID button to open the search window
- Enter a Report ID and click Search
- Click X to close

Search by Claim number:

- Click the Claim number button to open the search window
- Enter a Claim number and click Search
- Click X to close

Search by Form ID:

- Click the Form ID button to open the search window
- Enter a Form ID and click Search
- Click X to close

Search by Submitted by:

- Click the Submitted by button to open the search window
- Enter a user’s name and click Search
- Click X to close

Search by Date submitted:

- Click the Date submitted button to open the search window

- Choose one of the following date filters:
    - Last 7 Days
    - Last 60 Days
    - Custom Date Range
- Use the From and To calendar selections to choose a date range
- Click Search to apply or X to close

Search by Status:

- Click the Status button to open the status search window
- Select one or more statuses:
    - Queued
    - Processing
    - Delivered
    - Failed
    - Rejected
- Click Search to apply or X to close

Search by RTW clinic:

- Click the RTW clinic button to open the search window
- Enter or select a clinic and click Search
- Click X to close

Search by Provider reference number:

- Click the Provider reference number button to open the search window
- Enter the reference number and click Search
- Click X to close

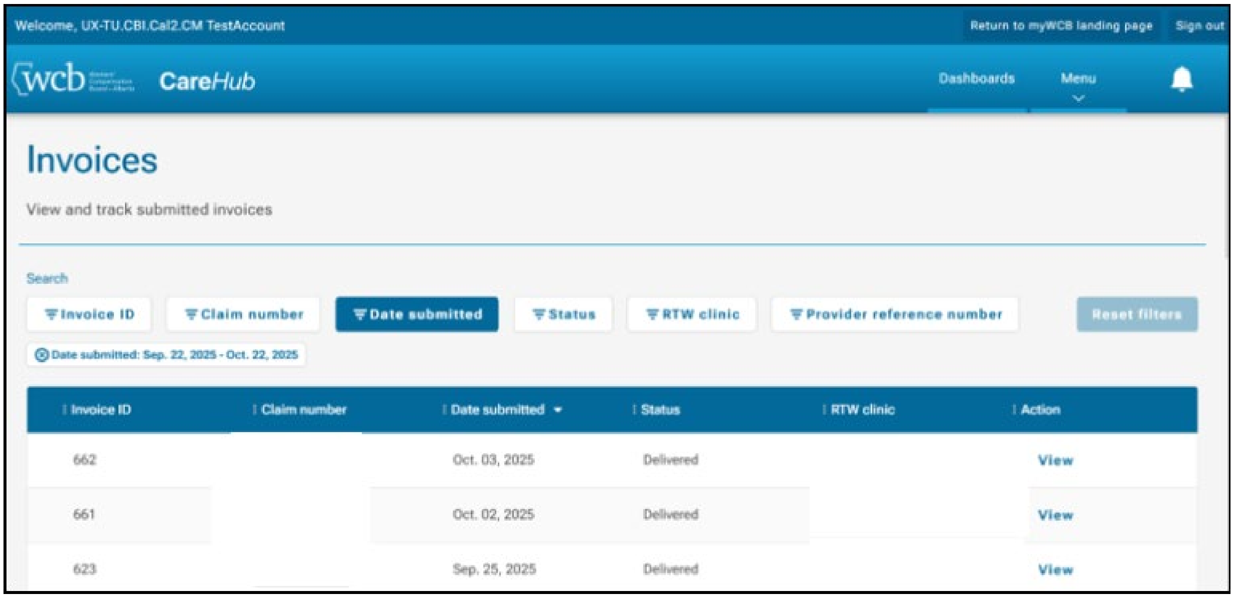
Reset filters:

- Click Reset filters to remove all search filters and reset sorting.

Search Criteria Applied - **No Results**

- If the search criteria return no reports, the grid will show a message indicating no records found.

Invoice summary screen



The Invoice summary screen allows RTW centres and internal WCB users to view invoice submissions and access submitted PDF invoices. A reference number can be seen by hovering over the i icon next to the invoice ID.

Users can search, filter and sort invoices by multiple criteria. RTW centre users can only view invoices submitted by their own centre. **Only specific roles have access to this screen.**

Invoice summary layout

Invoice information includes:

- Invoice ID
- Claim number
- Date submitted
- Status
- RTW clinic

The **View** hyperlink opens the submitted invoice PDF for the selected record in a new tab.

For Failed or Rejected submissions, the error type and description identify the reason for failure.

Using the Invoice Summary Table

Only invoices the user has permission to view will display. Filters can be applied using the search buttons. Active search filters appear as white buttons with blue text and an X to remove them.

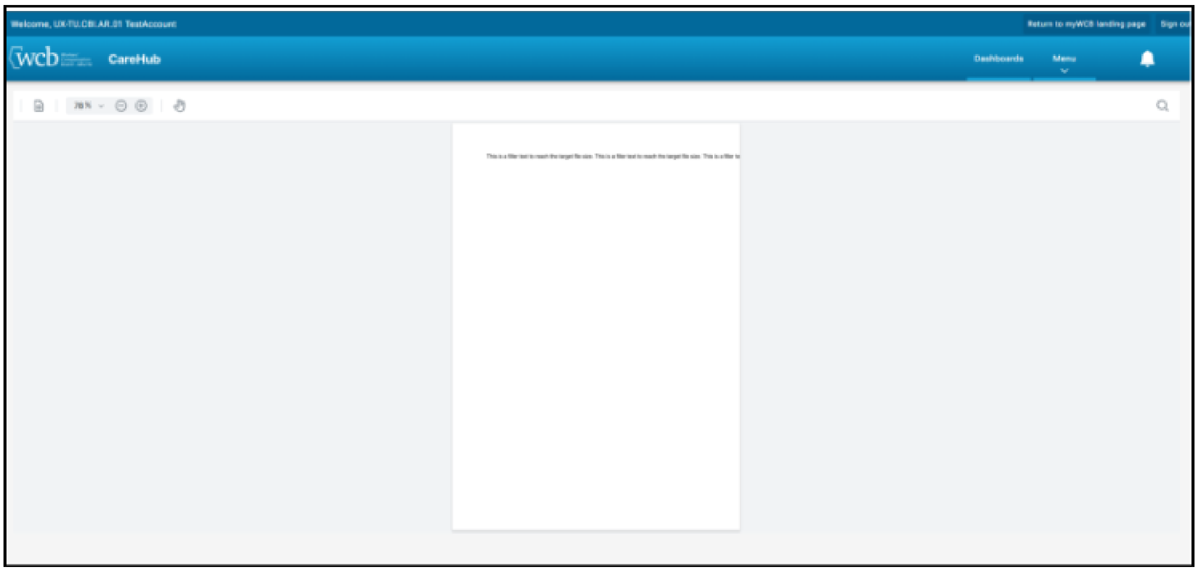
Sorting

Clicking on a column header (e.g., **Claim number**, **Form ID**, **Status**) will allow the user to sort in ascending or descending order:

- upward arrow = ascending
- downward arrow = descending

Invoice actions

The View hyperlink opens the invoice PDF in a new tab.



The **Dismiss** hyperlink is for Rejected or Failed invoices. Clicking this allows the user to remove it from the table. Dismissing does not permanently delete the invoice from the system, i hiding it from the view only.

Search options

Search by Invoice ID:

- Click the Invoice ID button to open the search window
- Enter an Invoice ID and click Search
- Click X to close

Search by Claim number:

- Click the Claim number button to open the search window
- Enter a Claim number and click Search
- Click X to close

Search by Date submitted:

- Click the Date submitted button to open the search window
- Choose one of the following date filters:
    - Last 7 Days
    - Last 60 Days
    - Custom Date Range
- Use the From and To calendar selection to choose a date range
- Click Search to apply or X to close

Search by Status:

- Click the Status button to open the status search window
- Select one or more statuses:
    - Queued
    - Processing
    - Delivered
    - Failed
    - Rejected
- Click Search to apply or X to close

Search by RTW clinic:

- Click the RTW clinic button to open the search window
- Enter or select a clinic and click Search
- Click X to close

Search by Provider reference number:

- Click the Provider reference number button to open the search window
- Enter the reference number and click Search
- Click X to close

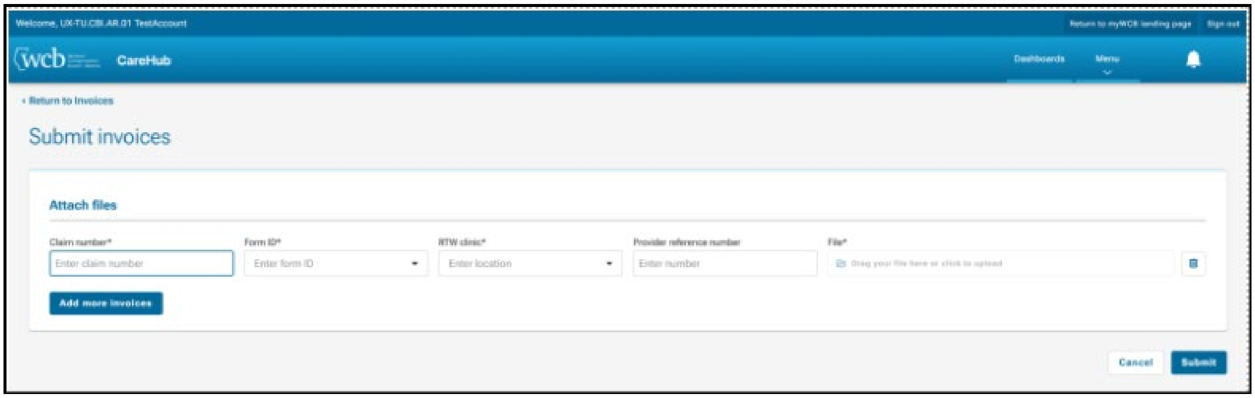
Reset filters:

- Click Reset filters to remove all search filters and reset sorting

Search Criteria Applied – No Results

- If the search criteria return no invoices, the grid will display a message indicating no records found.

Submitting an invoice



The Invoice submission screen enables RTW providers to submit invoices for services rendered. Submitted invoices are attached to the corresponding claim file.

To submit an invoice, the following fields are **required**:

- Claim number
- Form ID
- RTW clinic

Additionally, an optional provider reference number can be entered. This allows providers to include their own internal invoice reference for enhanced auditability.

Invoices must be uploaded in **PDF format**. Other file types are not accepted.

Mandatory fields for submission

- Claim number
- Form ID
- RTW clinic
- File (Invoice – PDF format)

Optional field

- Provider reference number (for internal tracking).

Uploading an invoice

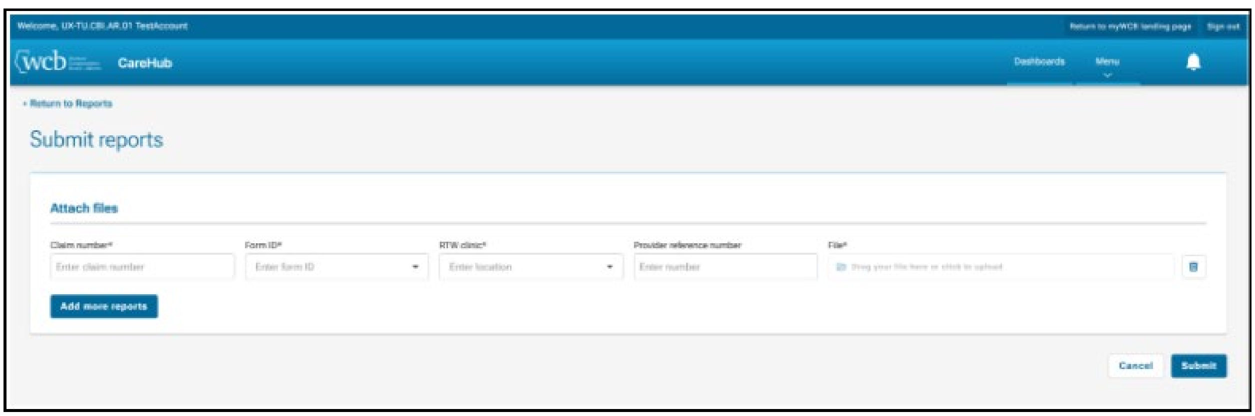
- Upload a PDF by either selecting the file or dragging and dropping it into the designated file field.

- Click the X icon to remove a selected file.
- Use the Delete invoice icon to remove the entire invoice entry.
- Click Add more invoices to create additional submission rows.
- Submit all invoices by selecting the Submit button.
- To return to the Invoice summary or cancel the process, use the Return to invoices hyperlink or the Cancel button.

Submitting an invoice

- Click the Submit button on the Invoice submission screen.
- Submit: Confirms submission and redirects user to the Invoice summary screen.
- Cancel: Closes submission section without submitting the invoice(s).
- X: Closes success message and returns user to the Invoice submission screen.

Submitting a report



The report submission screen allows return-to-work (RTW) providers to submit reports for services provided so that they can be attached to the claim file.

To submit a report, the following fields must be entered:

- Claim number
- Form ID
- RTW clinic

Once the user has entered a valid claim number, a valid Form ID and attached a valid file, they can submit the report.

Reports must be submitted as a **PDF**. No other file type will be accepted.

Mandatory fields for submission

- Claim number
- Form ID
- RTW clinic
- File (Report – PDF format)

Optional field for Submission

- Provider reference number (for internal tracking).

Uploading a report

- Upload a PDF by selecting it or dragging and dropping into the file field.
- Use X icon to remove a selected file.
- Use Delete report to remove the entire report entry.
- Use Add more reports button to create additional submission rows.
- Submit Reports using the Submit button.
- Return to Report summary or cancel using Return to reports hyperlink or Cancel button.

Submitting a report

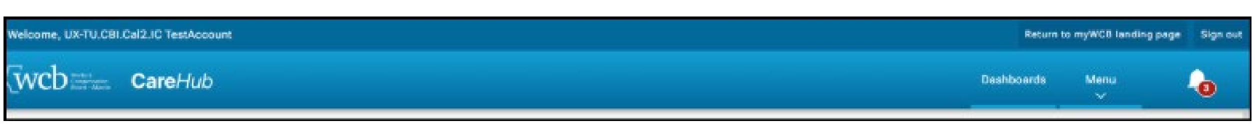
- User clicks Submit on the Report submission screen.
- Submit: Confirms submission and redirects the user to Report summary screen.
- Cancel: Closes submission section without submitting the report(s).
- X: Closes success message and returns user to the Report submission screen.

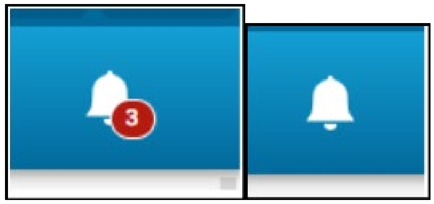
Notifications

A user will only receive an appropriate notification for a claim's referral if they are assigned to a specific referral as the Referral owner and the notification type is turned on.

The user can access their notifications by:

- Clicking the displayed bell icon in the mega menu. The bell icon will be displayed and clickable for a user in the mega menu from any screen.

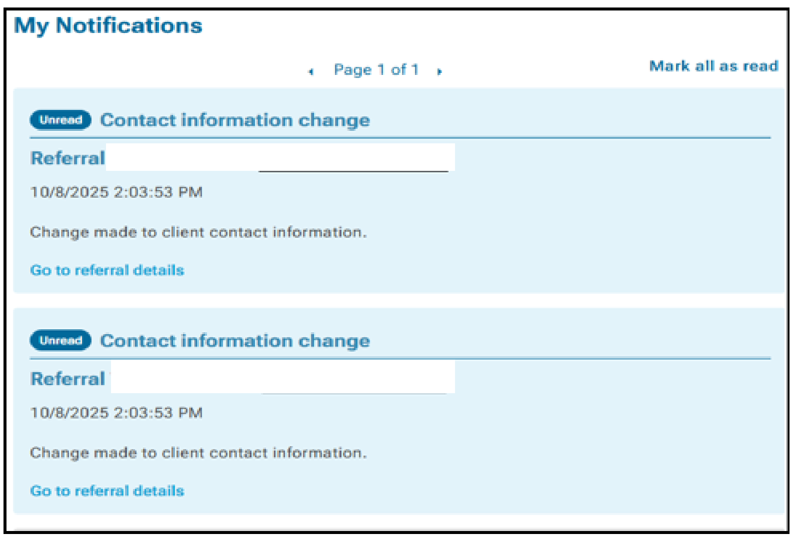




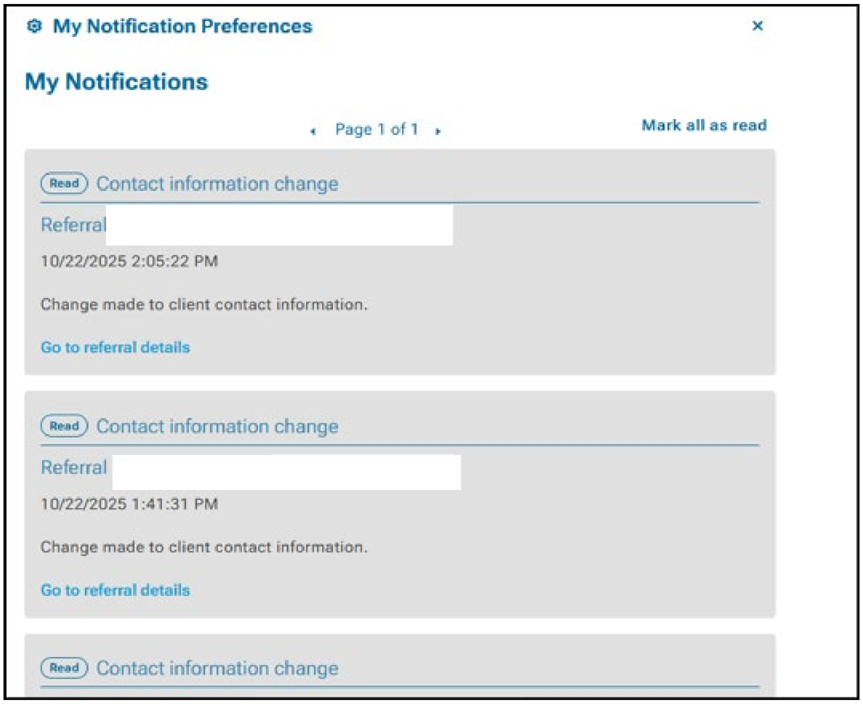
Read/Unread notifications

When an **unread** notification is received, the bell icon will alert a user of a new notification with a red numbered indicator displayed over top of the bell icon.

- To view the notification(s), the user clicks the bell icon, and the My Notifications window will display.
  - Unread notifications will be highlighted in light blue, display an Unread badge and have the notification type, claim number and worker name in bold.



- A notification can be marked **Read** by clicking the Unread badge or selecting the Mark all as read hyperlink on the right-hand side of the notification window.
- To successfully read an unread notification, a user must click the badge or hyperlink.
  - Read notifications will be highlighted gray, display a Read badge and have the notification type, claim number and worker name no longer in bold.



Subsequent clicks of the Read or Unread indicator on a notification will mark the notification as Read or Unread depending on the notifications prior status before clicking.

- *Example: If a notification has been marked as Read by a user who would like to return the red indicator on the bell icon or highlight the notification, the Read indicator can be clicked to mark the notification as Unread and return the red indicator on the bell icon.*

Notification types

Specific changes or updates to a claim trigger a notification to the assigned referral owner within CareHub.

The changes or updates that trigger notifications to the referral owner are considered medium priority notifications. *Examples of medium priority notifications include:*

- New injury: *A new injury has been added to the claim.*
- Injury decision change: *a decision has been made on a pending injury.*
- Earnings change: *changes made to client earnings.*
- Contact information change: *changes made to client contact information, employer contact information, modified work contact information, client representative contact information, employer representative contact information, union representative contact information or claim owner change.*
- Modified work started: *client will start modified work on <start date>.*

- Modified work ended: *client modified work is ending on <end date><reason for end>.*

Not all updates or changes to the claim are considered medium priority with some given a low priority notification type.

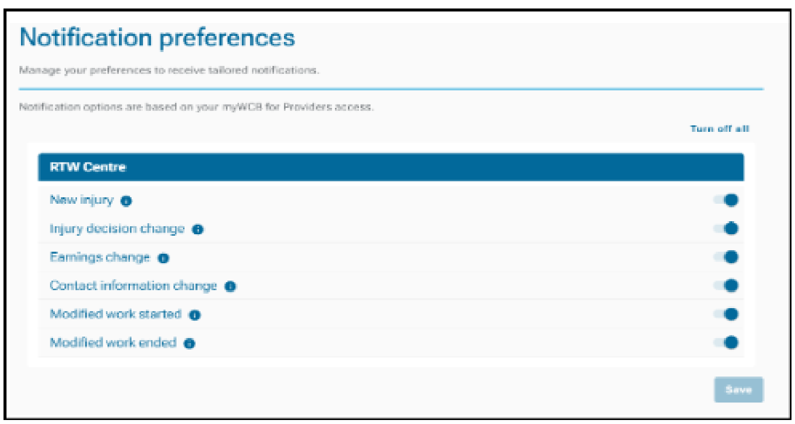
These low priority notifications do not produce a notification alert and will only be displayed within the History tab of the referral details on a specific referral, rather than the bell icon or in the My Notifications window.

Please see the Referral Details section of the user guide for information regarding low priority notifications and the History tab.

Notification preferences

The Notification Preferences window is accessed through the notification bell icon.

- Click the bell icon in the CareHub mega menu.
- In the My Notifications window, click the My Notification Preferences hyperlink at the top.



When in the Notification preferences window, a user has the option to toggle on/off individual notifications to customize the notifications received for claims through CareHub.

- To turn a notification on or off, select the toggle icon for each individual notification – subsequent clicks to the same toggle will turn the toggle back on or off.
- If a user wants all notifications turned off, select the Turn off all hyperlink on the right-hand side of the RTW Centre Notification Preferences table.
    - When the Turn off all hyperlink is clicked, the hyperlink changes its display to Turn on all and the user can reselect the hyperlink to turn all notification toggles back to on.

When the Notification preferences have been customized, the user will need to Save their selections by clicking the button displayed at the bottom right of the screen. Changes applied will show across all referrals.

Stop notifications

Alternatively, a user can **turn off** notifications for a singular referral without adjusting all notifications for other referrals assigned to them via the referral owner field.

To stop notifications for an individual referral:

- Access the referral details page of an individual referral by double clicking the referral column of the desired referral in the Referral summary screen.
- Locate the Stop notifications checkbox in the banner of the selected referral.

Who To Contact

Contact	Contact info	Reason
eBusiness	eBusiness.support@wcb.ab.ca	- Help navigating electronic reporting/ CareHub - Note that you should be contacting your internal Help Desk first to address any technical issues
Health Care Strategy RTW Mailbox	rtw@wcb.ab.ca	- RTW questions, updating information, contract questions
RTW Service Approval Requests Mailbox	hcs.rtwapprovals@wcb.ab.ca	- Requests to proceed with services or assessments, extensions, and exceptions outside of CO authority
Re-employment Services Mailbox	hcsre-employmentservices@wcb.ab.ca	- RE questions - RE approvals
Medical Aid	medical.aid@wcb.ab.ca	- Billing, invoicing, or outstanding payments
Claim owner (CO)	Check the referral for Claim Owner contact information. If you don't have that information or are unsure who the claim owner is, call the **Claims Contact Centre**	- Claim information, decisions, approvals - Collaborative phone calls about client progress, concerns, discharge, extensions, etc.
Claims Contact Centre	contact.centre@wcb.ab.ca Toll Free in Alberta: 1-866-922-9221 Calgary: 403-517-6000 Edmonton: 780-498-3999	- General and claims related questions (reviewing claim info, reporting, billing, providing CO contact info, etc.) - Can document information to pass along to the CO - Can help connect you to the right person during the call or document a file note for the CO