

# eClearance

## User Guide

For Access to eClearance Without a User ID

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# eClearance User Guide

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## Getting Help

### Online help

As you are using the eClearance application, help and error messages will be available to guide you.

### The WSIB eClearance helpline

For business support contact: 1-888-243-1569 or 416-344-4122

For technical support contact: 1-888-243-1569 or 416-344-4122

## Session Timeouts

Before you log on to the system, we recommend that you have on hand all of the information you will need while you are working on the system:

- Contractor's WSIB account number which will provide you with the most accurate results. If you do not have the account number, you'll need some or all of the following information: the contractor's legal or trade name, Canada Revenue Agency (CRA) business number, address, telephone number, and email address.
- Principal's WSIB account number which will provide you with the most accurate results. If you do not have the principal's account number, you'll need some or all of the following information: the legal or trade name, CRA business number, address, telephone number, and email address.

Please ensure you have all required information on hand prior to logging on, because your online session will expire if it has been inactive for 20 minutes or more. For security reasons, the system will log you out. We have taken this precaution in order to protect your information. You will have to log in and start over.

## How your Account Details are Entered into the Application

When a principal or a contractor registers with the WSIB, the principal's/contractor's account details are entered into the WSIB's central database and are available in the eClearance application.

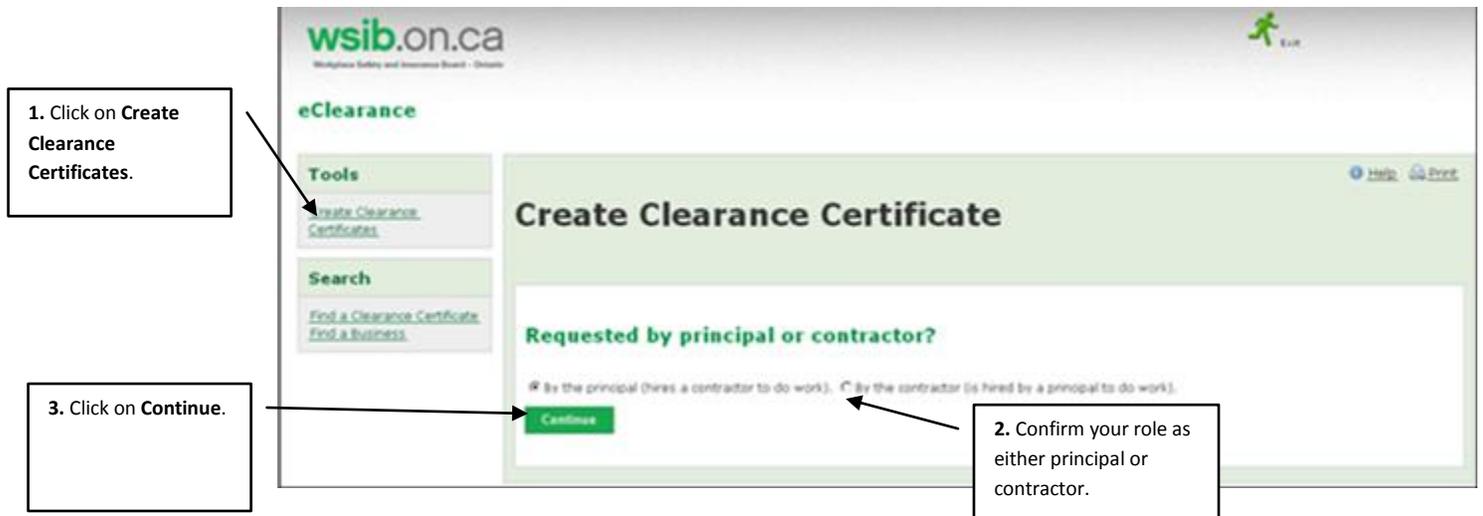
## Creating Clearance Certificates

To create clearance certificates, you need to identify who is requesting the clearance certificate. The process of creating a clearance certificate is different depending on whether the requestor is a principal or a contractor. A principal may request clearance certificates for multiple contractors at one time, and contractors may request clearance certificates for multiple principals at one time. The two processes are described below.

On your main screen, click on **Create Clearance Certificates**. The **Create Clearance Certificates** screen is displayed with the prompt **Requested by principal or contractor?**

First, select your role

- Principal (hires a contractor to do work)
- Contractor (is hired by a principal to do work)



### Requests from Principals

First, you need to search for your account information as the principal. Only accounts that are currently active with the WSIB are searched.

You can search

- by **account number** only (searching by account number ensures the most accurate results), or
- by **business name, telephone number, CRA business number, street address, city, and postal code** – this is an advanced search.

#### To search by account number

The account number is the 7-digit number the WSIB assigns to employers when they register with the WSIB.

1. The **Create Clearance Certificates** screen is displayed with the prompt **Find Requestor's account (principal)**

In the **Search by Account Number** field, enter your account number.

2. When you have entered your account number(s), click **Search**.
3. Confirm that the information displayed for your company is correct and click **Select Principal**.

1. Enter your WSIB account number.

2. Click **Search**.

3. After confirming your information, click **Select Principal**.

Next, you need to search for the contractor(s) for whom you want clearance certificates. Only accounts that are currently active with the WSIB are searched.

You can search

- by **account number** only (searching by account number ensures the most accurate results), or
- by **business name, telephone number, CRA business number, street address, city, and postal code** – this is an advanced search.

**Note:** The system will not allow you to search/select your own account number.

### To search by account number

The account number is the 7-digit number the WSIB assigns to employers when they register with the WSIB. You can enter a maximum of 200 account numbers.

1. The **Create Clearance Certificate** screen is displayed with the prompt **Search for contractor(s)**

In the **Search by Account Number** field, enter each account number, making sure that you press the **Enter** key after each number.

**Note:** If you have existing lists of account numbers in other applications, such as Excel and Microsoft Word you can copy and paste them into the **Search by Account Number** field. Be sure that each number is on a separate line.

2. When you have entered the required account number(s), click **Search**.

In the search results, by default, contractors who are eligible for certificates are automatically selected (i.e., contain a checkmark). If there are any contractors for whom you do not want to create certificates, you need to deselect them.

Contractors who are not eligible for certificates do not have a checkmark beside them.

3. Beside each contractor you want to deselect, click on the checkmark so that the box is blank as shown in the screen shot on the next page.
4. Continue with **Understanding search results** and **Adding selected contractors to the eCart**.

# Create Clearance Certificates

Selected Principal

Legal/Trade Name 123456789 ONTARIO LTD

Address 30 CAVERLEY DR, ETOBICOKE, ON, M9R 2L8, CAN

## Search for contractor(s)

Search by Account Number

Advanced Search

Enter one or more account numbers, one per line, up to a limit of 200.

1234567  
5689324

Search

Searching by account number ensures the most accurate result.

You can copy and paste account numbers from other applications (such as Excel or Microsoft Word).

When entering multiple account numbers, be sure to press the Enter key after each number.

Add Selected To eCart

### Search Results

<input type="checkbox"/> Select All	Contractor Legal/Trade Name	Address	Clearance Status	Current Certificate
<input checked="" type="checkbox"/>	<a href="#">123ABC LTD</a>	C/O M. PERCY, RR 3, LONDON, ON, N5A 4B7, CAN	<span style="color: green;">✔ Eligible for clearance certificates</span>	NA
<input type="checkbox"/>	<a href="#">ABC123 INC / CONSTRUCTION COMPANY</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN	<span style="color: red;">❌ Not eligible for clearance certificates</span>	NA

Contractors selected in step 4 are added to eCart.

**eCart**  
You have not selected any accounts

1. Enter account number(s) you want to search for.

2. Click Search.

3. Deselect contractors you do not want.

4. To add selected contractors to eCart, click Add Selected to eCart.

## To do an advanced search

When doing an advanced search, as described below, you can enter one or more fields to search by. For the search to work, you must enter the search text exactly as it appears in the system.

1. Enter one or more of the fields by which you want to search:
  - **Business name** (i.e., trade name/legal name; maximum of 200 characters)
  - **Telephone number** (XXX)XXX-XXXX
  - **CRA business number** – 9 digits
  - **Street address** (maximum of 350 characters)
  - **City** (maximum 25 characters)
  - **Postal code** (format: X1X 1X1, including a space)
2. Click **Search**.
3. Beside each contractor you want to select, click in the box to add a checkmark.
4. Continue with **Understanding search results** and **Adding selected contractors to the eCart**.

The screenshot shows a web interface for searching contractors. It has two tabs: 'Search by Account Number' and 'Advanced Search'. The 'Advanced Search' tab is active, showing several input fields: Business Name (containing 'ABC'), Telephone Number, CRA Business Number, Address, City, and Postal Code. A green 'Search' button is located at the bottom right of the form. Below the form is a table of search results with columns for 'Select All', 'Contractor Legal/Trade Name', 'Address', 'Clearance Status', and 'Current Certificate'. Two contractors are listed: '123ABC LTD.' and 'ABC123 INC / CONSTRUCTION COMPANY'. The first contractor is selected with a checkmark and is marked as 'Eligible for clearance certificates'. The second contractor is not selected and is marked as 'Not eligible for clearance certificates'. A callout box on the left explains that when doing an advanced search, none of the contractors are selected. Another callout box on the right points to the 'Search' button. A third callout box on the left points to the 'Select All' checkbox in the table header.

1. Enter search criteria.

2. Click Search.

3. To select all contractors, click Select All, or to select individual contractors, click in boxes.

When you do an advanced search, none of the contractors are selected.

Select All	Contractor Legal/Trade Name	Address	Clearance Status	Current Certificate
<input checked="" type="checkbox"/>	<a href="#">123ABC LTD.</a>	C/O M. PERCY, RR 3, LONDON, ON, N6A 4B7, CAN	Eligible for clearance certificates	NA
<input type="checkbox"/>	<a href="#">ABC123 INC / CONSTRUCTION COMPANY</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN	Not eligible for clearance certificates	NA

## Understanding search results

The eClearance application displays a list of all of the contractors that match your search criteria. For each contractor, the **account number**, **legal/trade name**, **address**, and **clearance status** are displayed.

The **clearance status** field may contain one of the following messages:

Clearance status message:	Meaning of message:
<b>Eligible for clearance certificate</b>	The contractor is registered with the WSIB, has filed all premium remittance forms and reconciliation forms, and has paid all premiums owing to the WSIB based on payroll reported.
<b>Not eligible for clearance certificates</b>	The contractor is unable to obtain a clearance certificate and needs to contact the WSIB to determine the reason.
<b>Invalid account number</b>	The contractor is either not registered with the WSIB, or one or more of the search text likely contained a typo, so no match was found in the system.

Search results are limited to 200 records. If more than 200 records are found matching your search criteria, you will be prompted to refine your search.

## Adding selected contractors to the eCart

In this system, the “eCart” is an acronym for “electronic cart”. The eCart is similar to the shopping cart you use in grocery stores or when you are shopping online — you put all the items you want to buy into the shopping cart and then go to the check-out to pay for them. In this system, you select the contractors for whom you want to create a clearance certificate and move them to the eCart — a temporary list where you can store contractors’ information until you are ready to create all their clearance certificates.

### To add the selected contractors to the eCart

1. After you have identified the contractors for whom you want to print a clearance certificate, click on the **Add selected to eCart** button.

The selected contractors are added to the eCart where you can view their details, remove them, or create certificates. At the top of the eCart, the message “Certificate valid until dd/mmm/yyyy” tells you for how long the certificates will be valid.

If there are fewer than 6 contractors in your eCart, the system displays the link **Show Details**. If there are more than 6 contractors in your eCart, the system displays the link **View all items in your eCart** and the link **Create Certificate**.

2. Click on **Show details** or **View all items in your eCart** to display a table with the details for all of the contractors in your eCart. From the table you can:

- Add contractors
- Remove contractors
- Create certificates

## Creating clearance certificates from the eCart

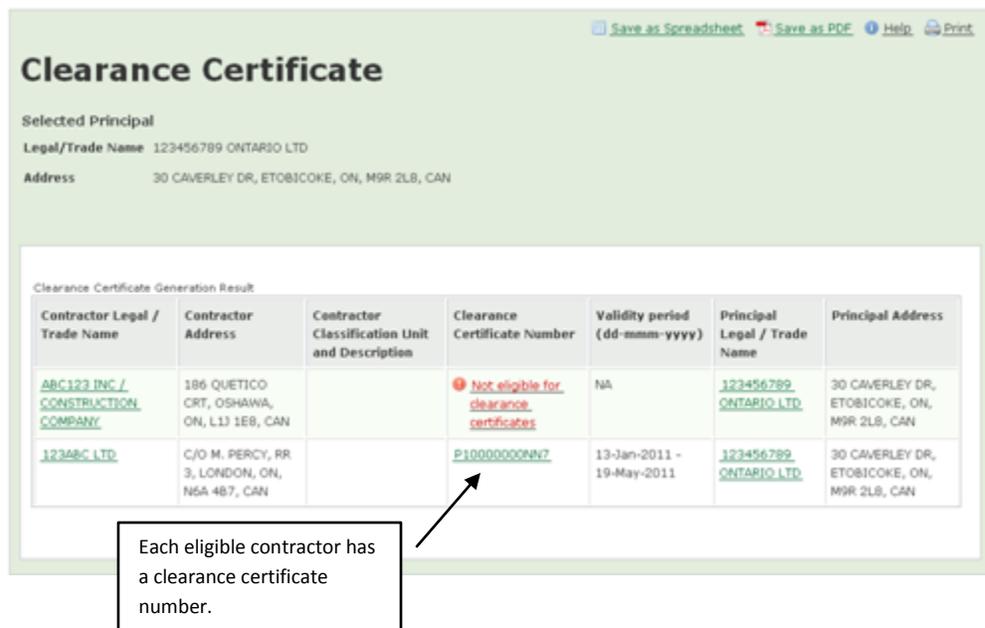
You can create clearance certificates from the eCart.

### To create a clearance certificate from the eCart

1. Click on the **Create Certificate** button.



2. The system displays the results. Each eligible contractor has a clearance certificate number.



The screenshot shows the 'Clearance Certificate' results page. At the top, there are links for 'Save as Spreadsheet', 'Save as PDF', 'Help', and 'Print'. Below this, the title 'Clearance Certificate' is displayed. Underneath, the 'Selected Principal' information is shown: 'Legal/Trade Name: 123456789 ONTARIO LTD' and 'Address: 30 CAVERLEY DR, ETOBICOKE, ON, M9R 2L8, CAN'. The main content is a table titled 'Clearance Certificate Generation Result'.

Contractor Legal / Trade Name	Contractor Address	Contractor Classification Unit and Description	Clearance Certificate Number	Validity period (dd-mmm-yyyy)	Principal Legal / Trade Name	Principal Address
<a href="#">ABC123 INC / CONSTRUCTION COMPANY</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN		Not eligible for clearance certificates	NA	<a href="#">123456789 ONTARIO LTD</a>	30 CAVERLEY DR, ETOBICOKE, ON, M9R 2L8, CAN
<a href="#">123ABC LTD</a>	C/O M. PERCY, RR 3, LONDON, ON, N6A 4B7, CAN		<a href="#">P10000000NN7</a>	13-Jan-2011 - 19-May-2011	<a href="#">123456789 ONTARIO LTD</a>	30 CAVERLEY DR, ETOBICOKE, ON, M9R 2L8, CAN

A callout box with an arrow pointing to the 'P10000000NN7' cell contains the text: 'Each eligible contractor has a clearance certificate number.'

## Removing contractors from the eCart

To remove a contractor from the Clearance Certificate eCart, click on the **Remove** link that appears beside the contractor's name.



## Requests from Contractors

The process for creating clearance certificates with the contractor as the requestor is very similar to the process for principals described above. You can follow the steps above to identify the contractor and principal before creating a clearance certificate.

Contractors may request clearance certificates for several principals. In these cases, you can select multiple principals following the same basic process for selecting multiple contractors described above.

Some processes are unique to contractor requests for clearance certificates, and these are described below.

### Contractors Not Eligible for Clearance Certificates

When contractors are not eligible for clearance certificates, the system displays “Not Eligible for clearance certificates” in the **Clearance Status** field of your search results. In this case, you cannot continue with creating a clearance certificate and the contractor should contact WSIB at 1-888-243-1569 or 416-344-4122.

Contractor Legal/Trade Name	Address	Clearance Status	Action
<a href="#">ABC123 INC / CONSTRUCTION COMPANY</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN	Not eligible for clearance certificates	

If the contractor is not eligible, they should contact WSIB at 416-344-4122 or 1-888-243-1569 for assistance.

## Working with the Search Menu

Use the Search Menu to search for:

- Clearance certificates, and
- Businesses.

The screenshot shows the wsib.on.ca website interface. At the top left is the logo 'wsib.on.ca' with the text 'Workplace Safety and Insurance Board - Ontario' below it. At the top right is a green 'Exit' button with a person icon. Below the logo is the 'eClearance' header. On the left is a 'Tools' sidebar with a 'Search' section highlighted by a black box. The 'Search' section contains two links: 'Find a Clearance Certificate' and 'Find a Business'. The main content area is titled 'Find a Clearance Certificate' and features a search input field with the placeholder text 'Please enter one or more clearance...'. Below the input field is a green 'Search' button. Two callout boxes with arrows point to the search links: one points to 'Find a Clearance Certificate' with the text 'See the section called "Finding a Clearance Certificate."' and the other points to 'Find a Business' with the text 'See the section called "Finding a Business."' Below the search input field, there is a note: 'You can copy and paste clearance certificate numbers from other applications (such as Excel or Microsoft Word). When entering multiple clearance certificate numbers, be sure to press the enter key after each number.'

## Finding a Clearance Certificate

Clearance certificate numbers link to individual clearance details screens.

### To find a clearance certificate

You can enter and search for a maximum of 200 clearance certificate numbers.

1. Click on **Find a Clearance Certificate**.
2. On the **Find a Clearance Certificate** screen, enter each clearance certificate number; be sure to press the **Enter** key after each number.

**Note:** If you have existing lists of clearance certificate numbers in other applications, such as Excel and Microsoft Word you can copy and paste them into the search field. Be sure that each number is on a separate line.

3. When you have entered the required clearance certificate number(s), click **Search**.

The system displays the clearance certificate numbers along with the list of results as shown on the next page. The displayed results include:

- Contractor legal/trade name
- Contractor mailing address
- Contractor Classification Unit (CU) and CU description
- Clearance certificate number (Each certificate number links to a single certificate. If a contractor is ineligible for a clearance certificate, a number is not generated for that contractor).
- Validity period
- Principal legal/trade name
- Principal mailing address

The screenshot shows the 'Find a Clearance Certificate' page on the wsib.on.ca website. The page has a green header with the logo and navigation links. A left sidebar contains 'Tools' and 'Search' sections. The main content area has a title 'Find a Clearance Certificate' and a text input field containing three clearance certificate numbers: ZX12345678XZ, VU12345678UV, and TS12345678ST. A green 'Search' button is located below the input field. Three callout boxes with arrows point to specific elements: the first points to the 'Find a Clearance Certificate' link in the sidebar; the second points to the input field containing the numbers; the third points to the 'Search' button.

1. Click on **Find a Clearance Certificate**.

2. Enter up to 200 clearance certificate numbers. Press **Enter** after each.

3. Click on **Search**.

Search criteria.

ZX12345678XZ  
VU12345678UV  
TS12345678ST

**Search**

You can copy and paste clearance certificate numbers from other applications.  
When entering multiple clearance certificate numbers, make sure they are separated by commas.

To view a clearance certificate, click on the certificate's number

To view a contractor's details, click on the contractor's name.

Search Results

Contractor Legal / Trade Name	Contractor Address	Contractor Classification Unit and Description	Clearance Certificate Number	Validity Period (dd-mm-yyyy)	Principal Legal / Trade Name	Principal Address
<a href="#">JULIA B</a>	359 MAJOR ST, COBOURG, ON, K9A 4C8, CAN	6013-000: BAKERY PRODUCT STORES	<a href="#">ZX12345678XZ</a>	10-Nov-2010 to 15-Nov-2010	<a href="#">123ABC INC 5689324</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN
<a href="#">JULIA BAA / JULIA BAA</a>	37 MAJOR ST, LONDON, ON, N5Z 1E2, CAN	6013-000: BAKERY PRODUCT STORES	<a href="#">VU12345678UV</a>	10-Nov-2010 to 15-Nov-2010	<a href="#">123ABC INC 5689324</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN
<a href="#">JULIA AE / JULIA JULIA</a>	356 MAJOR ST, COBOURG, ON, K9A 4C7, CAN	6013-000: BAKERY PRODUCT STORES 7722-000: COMPUTER EQUIPMENT MAINTENANCE AND REPAIR	<a href="#">TS12345678ST</a>	10-Nov-2010 to 15-Nov-2010	<a href="#">123ABC INC 5689324</a>	186 QUETICO CRT, OSHAWA, ON, L1J 1E8, CAN

After you click **Search**, the search results are displayed.

To view a principal's details, click on the principal's name.

With the search results displayed on screen (see screen shot above), you can do any of the following actions:

- View a contractor's details. To do so, click on a contractor's name.
- View a clearance certificate for a specific contractor. To do so, click on the contractor's clearance certificate number.
- View a principal's details. To do so, click on a principal's name.

When any of the above details are displayed on screen, you have three choices:

- **Save as Spreadsheet**
- **Save as PDF**
- **Print**

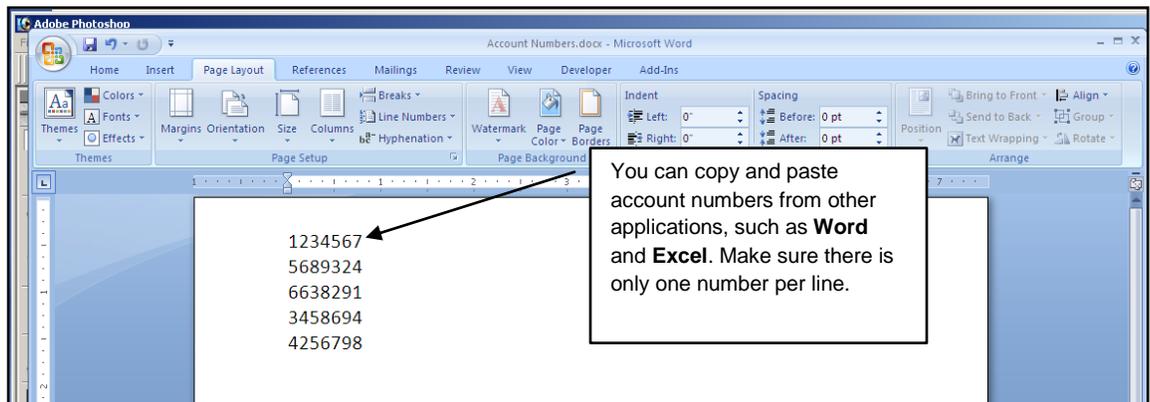
## Finding a Business

### To search by account number

The account number is the 7-digit number the WSIB assigns to employers when they register with the WSIB. You can enter a maximum of 200 account numbers.

- Click on **Find a Business**.
- In the **Search by Account Number** field, enter each account number, making sure that you press the **Enter** key after each number.

**Note:** You can also copy and paste account numbers from other applications, such as Excel and Microsoft Word (make sure there is only one number per line).



- When you have entered the required account number(s), click **Search**.

### To do an advanced search

When doing an advanced search, as listed below, you can enter one or more fields to search by. For the search to work, you must enter the search text exactly as it appears in the system.

1. On the **Find a Business** screen, click on **Advanced Search**.
2. Enter one or more of the fields by which you want to search:
  - **Business name** (i.e., trade name/legal name; maximum of 200 characters)
  - **Telephone number** (XXX)XXX-XXXX
  - **CRA business number** – 9 digits
  - **Street address** (maximum of 350 characters)
  - **City** (maximum 25 characters)
  - **Postal code** (format: X1X 1X1, including a space)
3. Click **Search**.

Only accounts that are currently active with the WSIB are searched. The eClearance application displays a list of all of the businesses that match your search criteria.

The screenshot shows the 'Find a Business' search interface. At the top right, there are links for 'Help' and 'Print'. The main heading is 'Find a Business'. Below this, there are two tabs: 'Search by Account Number' and 'Advanced Search'. The search form includes fields for 'Business Name' (containing 'abc'), 'Telephone Number', 'CRA Business Number', 'Address', 'City', and 'Postal Code'. A green 'Search' button is located at the bottom right of the form. Below the form, there is a 'Search Results' section with a table. The table has three columns: 'Legal / Trade Name', 'Address', and 'Clearance Status'. The first row shows '123ABC LTD' with a green checkmark and the text 'Eligible for clearance certificates'. The second row shows 'ABC LIMITED & CBA INC' with a red exclamation mark and the text 'Not eligible for clearance certificates'. Three callout boxes with arrows point to specific elements: '1. Enter search criteria.' points to the Business Name field; '2. Click Search.' points to the Search button; '3. Click on a Legal/Trade Name to view details.' points to the underlined name '123ABC LTD'. A fourth callout box on the left points to the search results table with the text 'Search results matching your search criteria are displayed.'

An error message is displayed if no search results are found matching search criteria. Search results are limited to 200 records (i.e. what will fit on a page). If more than 200 records match the search criteria, you will be prompted to refine your search.

To view the details for a business, click on its underlined name. The following details about the business are displayed:

- Legal Name
- Trade Name
- Address
- Rate Group and Description
- Classification Unit and Description
- Clearance Status