



Web Portal Overview for Assessors

May 2018

Overview

- Key capabilities and why you need them
- Account activation and login assistance
- Dashboard functionality review
- End to end referral process tracking with all the bells and whistles

Key Capabilities

- View upcoming assessment schedules
- View medical records electronically eliminating securedocs, heavy binders and save trees!
- Upload dictations, draft reports and doctor notes
- View draft reports back from QA
- Upload finalized reports and invoices
- Track active referrals by status
- Receive automatic notification of key events such as: appointment scheduled, rescheduled, draft report uploaded, report finalized, etc.
- Send notes to NYRC regarding active referrals
- View referral details such as: case history notes, documents, letters, and reports
- Enforce industry standard SSL 128-bit encryption

Full visibility and interactivity on referrals at every stage of the workflow.

Activate Account



Web Portal Account Re-Activation

Support Phone: (778) 372-1410

Support Email: intake.bc@nyrc.ca

Company Name: Test Company

Name: Grace Ma

Web User Login ID: grace@nyrc.ca

Password 

Confirm Password 

Submit 

Login Screen 

We have verified your re-activation request and it is valid. Please enter your password in the fields above and click submit.

The following are the password rules:

- The minimum length of the password must be at least 1 characters.



Bookmark New Secure Login

<https://webportal.nyrc.ca/login.aspx?id=5>



User Name

Password

Password

[Reset Password](#) [Bookmark Page](#)

[SIGN IN](#)

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WARNING: THIS IS A SECURE SITE. FOR SECURITY PURPOSES YOUR IP ADDRESS HAS BEEN LOGGED, DATED AND SENT TO THE SYSTEM ADMINISTRATOR.



NYRC Webportal Dashboard

View referrals with medical records, **Search referrals**, and **View** referrals by status.

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Refresh

0 New Referrals Since Last Login

0 New Docs Since Last Login

0 New Notes Since Last Login

Referral Tracker

Total Referrals By Status - Click +/- to show/hide detail

+ 5 Awaiting Medical Records

+ 22 Awaiting Appointment

+ 6 Report Development

+ 359 Complete

Total Referrals 392

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Expand and Collapse referrals by Status



Sorting Referrals

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Refresh

0 New Referrals Since Last Login

0 New Docs Since Last Login

0 New Notes Since Last Login

Referral Tracker

Total Referrals 392

+ 5 Awaiting Appointment

- 22 Medical Records

+ Status - Click +/for show/detail

Claim #	Examinee	Case #	Client	Physician	Service	Appt Date	View Case	Add File	Add Note	Upload Dictation
		113161			Independent Medical Evaluation	10/18/2018 9:00AM	Details	Upload	Add Note	Upload
		113245			Independent Medical Evaluation	11/22/2018 9:00AM	Details	Upload	Add Note	Upload
		81676			Live Testimony	09/25/2017 8:00AM	Details	Upload	Add Note	Upload
		84662			Live Testimony	02/06/2017 8:00AM	Details	Upload	Add Note	Upload
		87480			Live Testimony	02/27/2017 8:00AM	Details	Upload	Add Note	Upload
					Live	04/21/2017	Details	Upload	Add Note	Upload

- Sort Parameters:**
- Claim Number
 - Examinee
 - Case Number
 - Client
 - Service
 - Appt Date



View a Referral

View referrals in the **Awaiting Appointment** queue. Click the **Details** button for case specifics.

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Refresh

0 New Referrals Since Last Login

19 New Docs Since Last Login

0 New Notes Since Last Login

Referral Tracker

Total Referrals 393

Total Referrals By Status - Click +/- to show/hide detail

+ 5 Awaiting Medical Records

- 22 Awaiting Appointment

Claim #	Examinee	Case #	Client	Physician	Service	Appt Date	Details	Add File	Add Note	Upload Dictation
		81676			Live Testimony	09/25/2017 8:00AM	Details	Upload	Add Note	Upload
		84662			Live Testimony	02/06/2017 8:00AM	Details	Upload	Add Note	Upload
		87480			Live Testimony	02/27/2017 8:00AM	Details	Upload	Add Note	Upload
		89957			Live Testimony	04/21/2017 10:00AM	Details	Upload	Add Note	Upload

Referral Search

Easily search referrals by examinee Last Name

Dashboard

Referral Search

Change Password

Logout

Referral Search

Must select at least one search criteria - please do not use wildcard characters (*%), the query will do that for you.

Case# (must be numeric)

Claim# (partial claim# is OK)

Examinee

-Select-

search

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Chrome

Firefox

Edge

PowerPoint

Outlook

Calendar

Taskbar

View a Referral

Open a referral from the **Referral Search** page. View referrals in **Awaiting Appointment**. Click the **View** button.

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Referral Search Results - 2 Total Referrals

Must select at least one search criteria - please do not use wildcard characters (*%), the query will do that for you.

Case# (must be numeric)

Claim# (partial claim# is OK)

Examinee

Examinee

Q Search

Click on the heading to sort by that category

Web Ctl#	Claim #	Web Status	Examinee	Case #	Physician	Service	Specialty	Appt Date	View
114280		Awaiting Appointment						05/18/2018 12:30PM	Details
114072		Report Development						05/17/2018 9:00AM	Details

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Get to a referral from the referral tracker on the dashboard or referral search.



View Referral Documents

Click the **Documents** tab to see a list of all documents associated with the referral those not yet viewed are indicated as **New**.

[Dashboard](#)
[Referral Search](#)
[Physician Schedule](#)
[Change Password](#)
[Logout](#)

Referral Details

Case Number:	100116	Examinee:		Client Name:		Physician:	
Claim Number/Ext:		Appt Date:	1/18/2018 9:00:00 AM	Date of Loss:	5/30/2014	Location:	NYRCBC 1385
Service:		Status:		Report Development			

[Add Note](#)

[Add Document](#)

[History Notes \(0 Total - 0 new\)](#)

[Documents \(3 Total - 3 new\)](#)

[Related Cases With Same Claim# or Claimant \(1 Total\)](#)

No notes found

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Types of documents:

- Confirmation Letters
- Doctor Instruction Letters
- Medical Records
- Invoices
- Reports



Opening Documents

Once you click **View** the document will load and you can download documents to your desktop for viewing/editing

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Referral Details

Case Number: 100116

Examinee:

Client Name:

Physician:

Claim Number/Ext:

Appt Date:

Date of Loss: 5/30/2014

Location: NYRCBC 1385

Service:

Status: Report Development

Independent Medical Evaluation

Add Note

Add Document

History Notes (0 Total - 0 new)

Documents (3 Total - 3 new)

Related Cases With Same Claim# or Claimant (1 Total)

User ID	Description	Date	File Type	File Name	View Docs	New
AGioia	- LOI	12/22/2017	Medical Records	- LOI.pdf	View	New
AGioia	- INDEX	12/22/2017	Medical Records	- INDEX.pdf	View	New
AGioia	- MEDS	12/22/2017	Medical Records	- MEDS.pdf	View	New

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Downloading Documents

For PDF Documents: When you click **View**, the document will load in the NYRC Webportal. A random 5 digit number will be assigned to the document when you save it to your computer. Rename the document so you can find it easily

For Word Documents: When you click **View**, you have the option to **Open**, **Save** or **Save As**:

- 1) **Open** – this will open the document in the NYRC Webportal
- 2) **Save** – A random 5 digit number will be assigned to the document when you save it to your computer. Rename the document so you can find it easily
- 3) **Save As** and rename the document so you can find it easily

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Referral Details

Case Number: 108001

Claim Number/Ext:

Service: Independent Medical Evaluation

Add Note

Add Document

History Notes 0 Total - 0 new

Examinee:

Appt Date:

Client Name:

Date of Loss: 5/30/2013

Physician:

Location: NYRCBC 1385

What do you want to do with 47847.doc?

Size: 105 KB

From: webportal.nyrc.ca

Open

The file won't be saved automatically.

Save

Save as

Cancel

ed Cases With Same Claim# or Claimant 1 Total

User ID	Description	Date	File Type	File Name	View Docs	New
Amber.Gioia	- MEDS	4/12/2018	Medical Records	n - MEDS.pdf	View	New
Amber.Gioia	- INDEX	4/12/2018	Medical Records	n - INDEX.pdf	View	New
farica.lambert	- LOI	4/13/2018	Medical Records	n- LOI.pdf	View	New
SCramer	Draft	5/4/2018	Report	may02~nyr - dge - 2207567_1393.doc	View	New

View a Referral and History Notes

View and **Add** new case history notes which will be received by NYRC if necessary.

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Referral Details

Case Number: 107148

Claim Number/Ext: [input]

Service Index: [input]

Examinee: [input]

Appt Date: 6/22/2018 9:00:00 AM

Status: Awaiting Medical Records

Client Name: [input]

Date of Loss: 4/23/2014

Location: NYRCBC 1385

Physician: [input]

Add Note

Add Document

History Notes 0 Total - 0 new

Documents 0 Total - 0 new

Related Cases With Same Claim# or Claimant 0 Total

No notes found

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Attach a New Document

[Dashboard](#)

[Referral Search](#)

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[Change Password](#)

[Logout](#)

Referral Details

Case Number:
107148

Examinee:

Client Name:

Physician:

Claim Number/Ext:

Appt Date:
6/22/2018 9:00:00 AM

Date of Loss:
4/23/2014

Location:
NYRCBC 1385

Service:
Independent Medical Evaluation

Status:
Awaiting Medical Records

Add Note

Add Document

History Notes
0 Total - 0 new

Documents
0 Total - 0 new

Related Cases With Same Claim# or Claimant
0 Total

No notes found

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Uploading Documents

Select Document Type. Enter a description for the documents. Click **Browse** to find the documents on your system and click **Upload**.

 Dashboard

 Referral Search

 Physician Schedule

 Change Password

 Logout

Files and Documents

Case# 81676 Claim# P643770-0 // 55000-488 Examinee:

Please make sure the file upload confirmation box is displayed before leaving this page.

Select document type (required):

- Select-
- Addendum
- Billing Documents
- Cover Letter
- DICOM Images
- Films
- Medical Records
- Photos
- Report
- Videos

Character limit (required - 200 character maximum):

Click here to upload documents. A file upload dialog then upload them at once:

Having problems? Try the alternate version of the file upload screen by clicking the link below.
[Alternate File Upload Screen](#)

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NYRC

Uploading Multiple Files

Enter a description for the documents. Click **Browse** to find the documents on your system and click **Upload**.

 Dashboard

 Referral Search

 Physician Schedule

 Change Password

 Logout

Files and Documents

Case# 81676 Claim# P643770-0 // 55000-488 Examinee:

Please make sure the file upload confirmation box is displayed before leaving this page.

Select document type (required):

-Select- 

Enter description of file(s) being uploaded (required - 200 character maximum):

Select one or more files in the file browser dialog then upload them at once:

Upload Multiple Files

Having problems? Try the alternate version of the file upload screen by clicking the link below.

[Alternate File Upload Screen](#)

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Uploading Dictation

Easily upload dictations for quicker turnaround times

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Refresh

0 New Referrals Since Last Login

0 New Docs Since Last Login

0 New Notes Since Last Login

Referral Tracker

Total Referrals By Status - Click +/- to show/hide detail

+ 5 Awaiting Medical Records

- 22 Awaiting Appointment

Total Referrals 392

Claim #

Examinee

Case #

Client

Physician

Service

Appt Date

View Case

Add File

Add Note

Upload Dictation

A		113161			Independent Medical Evaluation	10/18/2018 9:00AM	Details	Upload	Add Note	Upload Dictation
A		113245			Independent Medical Evaluation	11/22/2018 9:00AM	Details	Upload	Add Note	Upload
F		81676			Live Testimony	09/25/2017 8:00AM	Details	Upload	Add Note	Upload
F		84662			Live Testimony	02/06/2017 8:00AM	Details	Upload	Add Note	Upload
F		87480			Live Testimony	02/27/2017 8:00AM	Details	Upload	Add Note	Upload
					Live	04/21/2017	Details	Upload	Add Note	Upload



Check Upcoming Appointments

Easily check your upcoming schedule for your assessment dates

Dashboard

Referral Search

Physician Schedule

Change Password

Logout

Physician Schedule - 2 Total Referrals

Select Appointment Start Date

Friday, May 18, 2018

Location

NYRCBC 1385

NYRCBC 1385

Appt Date

05/18/2018 12:00PM

05/18/2018 12:30PM

Claim #

Exam

Select Appointment End Date

Friday, May 18, 2018

Tuesday, May 22, 2018

Wednesday, June 6, 2018

Tuesday, June 12, 2018

Friday, June 22, 2018

Monday, August 20, 2018

Monday, August 27, 2018

Thursday, October 18, 2018

Thursday, November 22, 2018

View Details

View

View

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Related Cases (Addendums, Trial Notices, etc.)

Cases associated with the same claim number are also available for viewing

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Referral Details

Case Number:
114072

Examinee:

Client Name:

Physician:

Claim Number/Ext:

Appt Date:
5/17/2018 9:00:00 AM

Date of Loss:
4/19/2013

Location:
NYRCBC 1385

Service:

Status:
Report Development

Independent Medical Evaluation

[Add Note](#)

[Add Document](#)

History Notes (0 Total - 0 new)

Documents (2 Total - 2 new)

Related Cases With Same Claim# or Claimant (1 Total)

Claim #	Web Status	Examinee	Case #	Client	Physician	Service	Appt. Date	View Case
	Awaiting Appointment					Phone Consultation	05/18/2018 12:30PM	Details

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View the Report



Assessor receives email **notification** when the reports are available for viewing.



E-mail contains a **secure** [https link](#) to retrieve report.



The **report** can be viewed, printed or downloaded.



Communications

Communication between NYRC and assessor occurs at key points in the case workflow which is customizable based on assessor preferences.

Notifications

NYRC receives notifications when assessor:

- Uploads documents (draft report, final report, invoice)
- Enters a case history note

Notifications

NYRC receives notifications when assessor:

- Publishes:
 - Case history notes
 - Document
 - Report
- Announces progress of key events including:
 - New Referral
 - Scheduled
 - Rescheduled
 - Canceled
 - Show
 - No Show
 - Late Cancel
 - Report Finalized

Summary

- Streamlines referral workflow all on one platform
- Get real-time status and information
- Improve communications
- Access 24/7 from work, home or on the road
- Provide maximum security protections
- Easier to use
- Get better turn around times, fewer errors and on-time report delivery to clients

Discussion

We are here to listen to your requests to further enhance the NYRC web portal interface.

Thank you for your continued support.

We hope this new form of communications with NYRC gives you greater flexibility and saves you time.

