MC EDT Designee Maintenance Procedure Summary

Ministry of Health and Long-Term Care

Ontario

Designee Maintenance (Refer to Medical Claims Electronic Data Transfer (MC EDT) Reference Manual Section 3.1)

Add a Designee for the First Time (Refer to MC EDT Reference Manual Section 3.3/3.3.4)

1. Close any open Internet browser sessions.
2. Open a new Internet browser session and key in https://www.edt.health.gov.on.ca
3. At the GO Secure Login screen, key in your GO Secure ID (your email address) and password.
4. Select 'Sign In'.
5. At the Administration and MOHLTC Services page, select 'Designee Maintenance' (Add, Remove, Update).
6. At the Designated Accounts screen, select 'Add Designee'.
7. At the Designee Details screen, key in full name and email address of the person you would like to designate.
8. Select 'Save'.
9. A system generated email will be sent to you and your designee from GO Secure.
10. Close your Internet browser session.
11. Open your email account.
12. Open the email from GO Secure and retrieve the 'shared secret'.
13. Pass the 'shared secret' to your designee.
14. Wait for the system generated email from GO Secure advising you that your designee has accepted their designation (refer to Authorize Permission for Designee section).

Add a Designee Previously Designated (Refer to MC EDT Reference Manual Section 3.3/3.3.5)

1. Close any open Internet browser sessions.
2. Open a new Internet browser session and key in https://www.edt.health.gov.on.ca

3. At the GO Secure Login screen, key in your GO Secure ID (your email address) and password.

4. Select 'Sign In'.

5. At the Administration and MOHLTC Services page, select 'Designee Maintenance' (Add, Remove, Update).

6. At the Designated Accounts screen, select 'Add Designee'.

7. At the Designee Details screen, key in full name and email address of the person you would like to designate.

8. At the Designee Details screen, the designee's name and email address will appear on the screen indicating the designee has already been designate.

9. Select text 'Confirm this Designation'.

10. Log out and close your Internet browser.

11. **Note**: a system generated email will be sent to the designee. A shared secret is not required.

12. Wait for the system generated email from GO Secure advising you that your designee has accepted their designation (refer to Authorize Permissions for Designee section).

Designee GO Secure Registration (Refer to MC EDT Reference Manual Section 4.1/4.1.3)

First Time Designee Registration

1. Open email account.

2. Select GO Secure email 'Access created/Acces cree'.

3. Select link in email.

4. Close your email Internet browser window.

5. At the GO Secure Login screen, select 'Register Now'.

6. At the Registration: Step 1 of 2 screen, key first name, last name and email address.

7. Select 'Next'.

8. At the Registration: Step 2 of 2 screen, key your active email address in the GO Secure ID field.

   Note: An email address can only be associated to one GO Secure account.

9. Key in your password.

10. Confirm you password.

11. Choose 3 questions and key your answers.

12. Select 'Register'.

13. At the GO Secure Terms and Conditions of Use screen, select 'Accept'.

14. At the GO Secure Login – Registration Complete screen, close the Internet browser.

15. Open your email.

16. Select the system generated email from GO Secure.

17. Select the link in the email.

18. Close your email account and Internet browser.

19. At the GO Secure Login page, key in your GO Secure ID (your email address) and password.

20. Select 'Sign In'.

21. At the GO Secure Login – Email Validation screen, select '**here**'.

Designee Accepts Authorization (Refer to MC EDT Reference Manual Section 4.2)

First Time Designee

1. Obtain the system generated 'shared secret' from the health care provider.

2. At the Designee Enrolment screen, key in your shared secret and confirm the secret.

3. Select 'Continue'.

4. At the Acceptable Use Policy to Access the Claims Services Branch (CSB) Services screen, select 'Accept'.

5. Log out and close your browser.

6. Open a new browser session (https://www.edt.health.gov.on.ca).

7. At the GO Secure Login screen, key in your GO Secure ID (your email address) and password.

8. Select 'Sign In'.

9. At the 'Administration and MOHLTC Services' screen, your enrolment is confirmed.

10. Close your Internet browser.

11. Notify your health care provider that you have completed the registration and acceptance and an email will be sent to them.

12. The health care provider will notify you when he has authorized permissions and you can then begin using MC EDT to upload and/or download files on behalf of the health care provider.

Previously Added as a Designee

1. A 'shared secret' from the health care provider is not required.

2. Open email account.

3. Select link in the "Please Confirm Designated Access" email.

4. Close your email and Internet browser.

5. At the GO Secure Login page, key in your GO secure ID (your email address and password).

6. Select 'Sign In'.

7. At the Designee Acceptance screen, select the 'Accept' button to accept the health care provider's designation.

8. At the Success screen, log out and close your Internet browser.

9. Wait for notification from the Health Care Provider that permissions have been authorized at which time you can use the MC EDT service.

Health Care Provider Authorizes Permissions for a Designee (Refer to MC EDT Reference Manual Section 3.4)

1. Open your email account.

2. Retrieve GO Secure email with subject "Designate has confirmed access".

3. Select the link in the email.

4. Close your email account and Internet browser.

5. **OR** alternately you can open a new Internet browser session and log in using the MC EDT link (https://www.edt.health.gov.on.ca)

6. At the GO Secure Login screen, key in your GO Secure ID (your email address) and password.

7. Select 'Sign In'.

8. At the Administration and MOHLTC Services screen, select 'Designee Maintenance' (Add, Remove, Update).

9. At the Designated Accounts screen, select text "MC EDT" in the 'Service Access' column beside the designee.

10. At the Designate Permission screen, select the 'Select All' button or grant permission to specific files or reports as required.

11. Select 'Save'.

12. At the Designated Permissions screen, review your selection ('Designee Permissions have been saved'), log out and close the browser session.