



Wisconsin Compensation Rating Bureau

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Located at 20700 Swenson Drive, Suite 100, Waukesha, WI 53186

## GENERAL CIRCULAR 464 - July 12, 2004

TO ALL MEMBERS OF THE BUREAU:

### 2004 INDUSTRY TRAINING SESSION




#### When:

A WCRB Industry Training Session has been planned for Thursday, October 14, 2004.





#### Seminar Overview

This session will center on all areas of our member's interaction with WCRB.

#### Topics of discussion will be:

-  WCRB Web site
-  Industry Associations
-  Experience Rating Overview and Use of Web Tools

#### Breakout Sessions will be conducted for:

-  Electronic Data Reporting Information and High level Training (PEEP, Web BEEP, Desktop BEEP, CDX)
-  Financial Accounting Issues
-  Policy Reporting Issues
-  Basic and Advanced Unit Statistical Reporting Training

#### Who Should Attend?

Those staff members involved in Underwriting, Rating, Unit Reporting, IT Business Analyst, and Accounting.

#### Seminar Details

The seminar will be conducted at the Brookfield Sheraton, 373 S. Moorland Rd., Brookfield, WI. A block of 30 rooms has been reserved on a first-come, first served basis. Please contact the hotel directly to make your reservation. A room rate of \$99.00 plus taxes has been negotiated. The phone number to make reservations is 262-786-1100; ask for the WI Compensation block of rooms. Reservations in this block must be made before September 23, 2004. The hotel provides complimentary airport shuttle service.

The cost of this session will be \$75.00. Training materials, breaks, and lunch will be provided.

Registration will begin at 8:00 a.m. The training session will begin at 8:30 a.m. and conclude about 4:30 p.m.

Please complete the attached form and return it to WCRB by **September 3, 2004**.

#### Special Note:

Friday, October 15<sup>th</sup> has been set aside as WCRB's "Meet Our Staff Day". We would like to invite anyone interested in staying an additional day to stop by our office to meet and visit with members of our staff. Conference rooms will be available for one-on-one discussions of reporting issues, and "hands-on" BEEP and PEEP training.

Any questions regarding this seminar can be directed to Kay Higgins, WCRB, 262-796-4570, or via e-mail at [kay.higgins@wcrb.org](mailto:kay.higgins@wcrb.org)

# Agenda

# WCRB Industry Training Session

October 14, 2004  
Sheraton, Brookfield, WI

## Agenda topics

8:30 a.m.	Welcome Message	WCRB President, Ralph Herrmann
8:40 a.m.– 10:30 a.m.	<p>General Session Overview</p> <ul style="list-style-type: none"><li>WCRB Web Site Site Overview - A General, Brief Review of: Home Page, Forms, Circulars, FAQ, Search, Links, Contact Us, About Us.</li></ul> <p>Detailed Explanation of: Products Page, Member vs. Public Products, How to Become a Member, Structure of Members Area</p> <p>Overview of All Members Area Products - General Explanation, Intent of Tool, Mod Calc, Mod Lookup, Experience Rating Worksheet, Invoice Information, NTC Lookup, Premium Calc, USTS/Manage USR, WCPAP Calc, WCPAP Lookup</p> <p>Class Code Historical Performance Report</p> <p>Depopulation Report</p> <p>Industry Associations IDMA, WCIO, IAIABC, AmComp, ACCCT</p>	<p>Beth Nickel</p> <p>Ralph Herrmann</p> <p>Richard Colvin</p> <p>Christine Siekierski</p>
10:30 a.m. – 11:00 a.m.	Break	

<b>CONCURRENT SESSIONS</b>		
11:00 a.m. - 12:00 p.m.	<b><u>WCRB Electronic Reporting Overview and Instructional Breakout Sessions</u></b>	Betty Rohde, Christine Siekierski, Miguel Garcia, Kay Higgins
11:00 a.m. - 12:00 p.m.	<b><u>Financial Accounting Breakout Session</u></b>	Nancy Kierzek
12:00 p.m. - 1:00 p.m.	Lunch	
<b>CONCURRENT SESSIONS</b>		
1:00 p.m. - 2:45 p.m.	<b><u>Policy Breakout Session</u></b>	Betty Rohde Sara Shackelford
1:00 p.m. - 2:45 p.m.	<b><u>Basic Unit Reporting Breakout Session</u></b>	Melanie Lindseth
1:00 p.m. - 2:45 p.m.	<b><u>Advanced Unit Reporting Breakout Session</u></b>	Kay Higgins
2:45 p.m. - 3:15 p.m.	Break	
3:15 p.m. – 4:00 p.m.	<b><u>Experience Rating Overview and Use of Web Tools</u></b> Web tools: Experience Mod Calculation, Experience Mod lookup, Experience Rating Worksheet, WCRATING, and EXR through CDX	Nancy Kronenberg Melanie Lindseth
4:00 p.m. – 4:30 p.m.	Question and Answer Session	All Staff

### **WCRB Electronic Reporting Instructional Breakout Session 11:00 a.m. – 12:00 p.m.**

TOPICS:	
• Electronic Data Reporting for Policy and Unit Statistical Cards	Betty Rohde and Kay Higgins
• CDX 1. Carrier Group Administrator functions 2. Benefits of Using CDX: ETR Search of Submitted Files, Status of Submitted Files	Miguel Garcia
• PEEP	Betty Rohde
• Desktop and Web-Based BEEP	Kay Higgins and Christine Siekierski

### **Financial Accounting Breakout Session 11:00 a.m. – 12:00 p.m.**

TOPICS:	
• Monthly Invoicing Program: Detailed review of the monthly invoicing program, including a review of the different types of charges, etc.	
• Invoice Information Web Product: Walkthrough of the Invoice Information Web Product	

### **Policy Breakout Session 1:00 p.m. – 2:45 p.m.**

TOPICS:
• Electronic reporting, WCPOLS, and difference between electronic and hard copy reporting
• Filing requirements
• Notice to Carriers (NTCs) What are they, how to respond, how to avoid, etc. There will also be a review of the Web NTC Lookup.
• Termination of coverage including non-renewal requirements and how they relate to WI statutes
• WI Inspection surveys
• Expense constant and minimum premium rules
• Requirement when WI is added by endorsement - receipt of policy, indication that WI was added due to audit included, etc.
• Named insured/legal status
• WI Locations
• Endorsements - attaching them to policies, nonstandard endorsement procedures
• Experience Modification – WCRB application procedures
• Carrier Name change requirements
• Anniversary rating dates
• New WCRB procedures for overlapping coverage
• WCRB plans for the future - increased use of electronic methods of communication including submission of policy information

### **Basic Unit Reporting Breakout Session 1:00 p.m. – 2:45 p.m.**

TOPICS:
• Data Flow From Carriers to WCRB
• WCRB Statistical Plan and Reporting Requirements
• WCRB/Carrier Communication
• USTS

### **Advanced Unit Reporting Breakout Session 1:00 p.m. – 2:45 p.m.**

TOPICS:
• Reporting Directly with WCRB
• WCESTAT
• USTS/Manage USR

**WCRB INDUSTRY TRAINING REGISTRATION FORM:**

Please identify the name of each person attending. (Copy this form for additional people desiring to attend this training session)

**Attendee Name and Title:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

I WILL BE ATTENDING THE FOLLOWING BREAKOUT SESSIONS:

**CHECK ONE OF THE FOLLOWING:**

**11:00 – 12:00 – Morning Breakout Session**

- WCRB Electronic Overview and Instructional Breakout Session ( )
- Financial Accounting Issues Breakout Session ( )

**CHECK ONE OF THE FOLLOWING:**

**1:00 – 2:45 – Afternoon Breakout Session**

- Policy Reporting Issues Breakout Session ( )
- Basic USR Training Breakout Session ( )
- Advanced USR Training Breakout Session ( )

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**WCRB’s “Meet Our Staff Day”.**

\_\_\_\_\_ I plan to visit the WCRB on Friday October 15, 2004.

\_\_\_\_\_ I am interested in detailed instruction for PEEP.

\_\_\_\_\_ I am interested in detailed instruction for BEEP.

\_\_\_\_\_ I would like to meet with \_\_\_\_\_, and would like help with \_\_\_\_\_

\_\_\_\_\_

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Carrier Code: \_\_\_\_\_

Carrier Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Make your check payable to WCRB in the amount of \$75.00. **Print the completed form and mail with your check to WCRB by September 3, 2004.** (Attention: Kay Higgins, WCRB, P. O. Box 3080, Milwaukee, WI 53201-3080)