WEBSITE MEMBER USER GUIDE

The WCRB website offers three levels of membership based on organization type:

- **Agency:**
  An entity that employs a person or persons licensed by the Wisconsin Office of the Commissioner of Insurance who solicits, negotiates, or effects insurance contracts on behalf of one or more insurers. Any agency applying for membership **must** provide an active National Producer Number (NPN). Corporate (Agency) licensing is not required and does not provide the Agency with any authority to act as an agent.
  Before applying, check the State Based System (SBS) to be sure you have an active NPN.
- **Carrier:**

  An entity that holds and supports the worker's compensation policy and upholds the risk associated with an insurance policy. Carriers must be a member of the bureau to become a member on the website. See Appendix 1 of our latest Annual Report to verify your five digit bureau membership ID.
- **Employer**:

  Entities that employ one or more workers and operate a business in the state of Wisconsin are required to have worker's compensation insurance.

Membership offers specific products based on organization type. See the last page of this document titled "WCRB website Access" for the detailed product listing by organization type.

The WCRB website membership utilizes a "self-serve" structure that allows members to administer and control their accounts within their organization. Four levels of User accounts exist within this membership:

- **WCRB Administrator** create and maintain Group Administrator accounts ONLY.
- **Group Administrator:**
  - One Group Administrator will exist for each Carrier Group, Employer and Agency.
  - The Group Administrator is authorized by the Organization's President, Owner, or a Chief Officer.

- The Group Administrator has access to all member accounts for their organization.
- The Group Administrator is responsible for creating, maintaining, and inactivating Administrator and User accounts. (Note that accounts cannot be deleted, only inactivated)
- The Group Administrator determines which products Administrators and Users will have access to.

- **Administrators:**
  - Administrators are created by the Group Administrator.
  - Administrators can create and maintain User accounts.
  - Administrators can only grant product permissions to users that they create or that are reassigned to them by the Group Administrator via the Replace Administrator or Move User Administrator Options.
  - Administrators cannot see nor modify any user profile created by any other Administrator.
  - When an Administrator creates a User, that User will only be allowed access to member products available to that respective Administrator. (Users cannot have more product access than their Administrator)

- **Users**:
  - Users have access to those member products that the Administrator has enabled for them.

Member Resources:

Who's My Group Administrator?

When a member is logged into the website, they can select the "View My Member Information" link located in the Member Area Box on the wcrb.org Home page.

Selecting this link will show:

- The members profile details (contact name, address, email, and phone)
- Date and time they last visited the website
- The Number of times they logged into the site
- Group Administrator contact information

Carrier members will also see their organization's email notification contact preferences for NTCs, USRs, WCPAP worksheets and Inspection Reports.

Group Administrator Change Request
Members can change their designated Group Administrator by completing a Group Administrator change request.

Be advised when a Group Administrator change request is processed, the old Group Administrator account is inactivated.

Authorizing Officer Change Request
Members can change their designated Authorizing Officer by completing an Authorizing Officer change request.

Member Account Maintenance:

Group Administrators and Administrators have various options available to help maintain member accounts when viewing an individual member's profile.

Three levels of account status exist in the WCRB website membership:

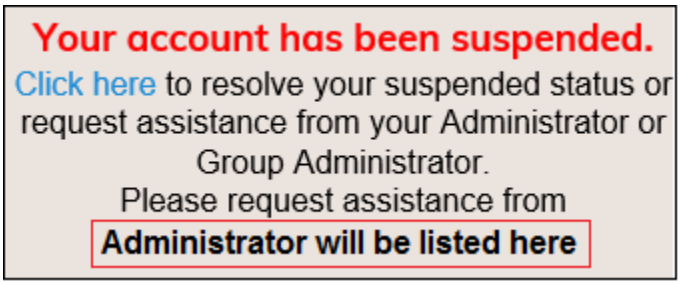
1. ACTIVE—All active User or Administrator accounts within the organization
2. ACTIVE–**suspended**—An ACTIVE user has suspended their account due to login failures
3. INACTIVE—A Group Administrator or Administrator changes a member's status to **inactive** to prevent membership access. Members cannot be deleted from the membership

Reset a Suspended Account:
There are 2 ways for a member to clear their suspended account:

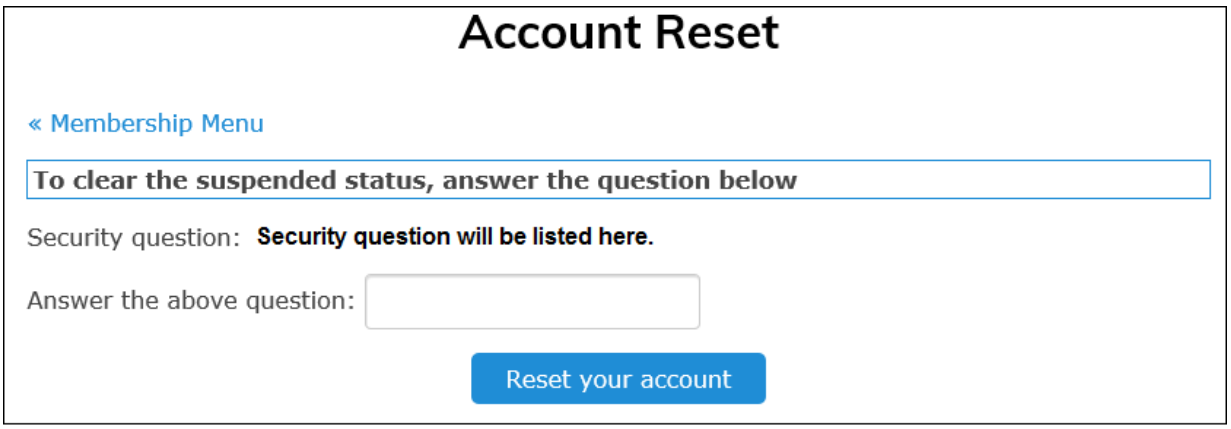
- Self Service option to clear suspended status
- Group Administrator or Administrator assistance

1) Self Service option to clear suspended status

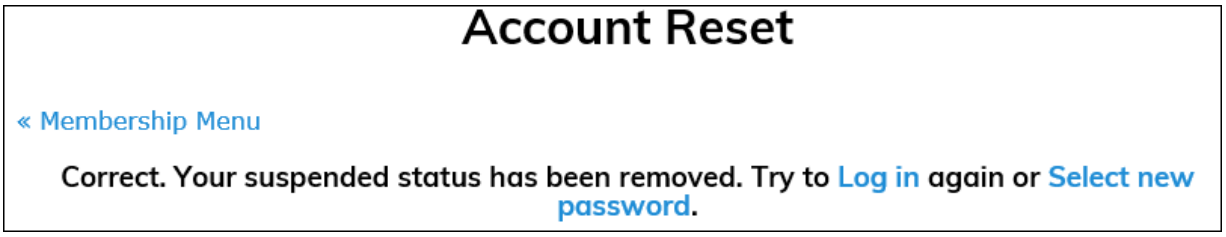
- When your account is suspended the message will appear below.
- Select the **Click here** link



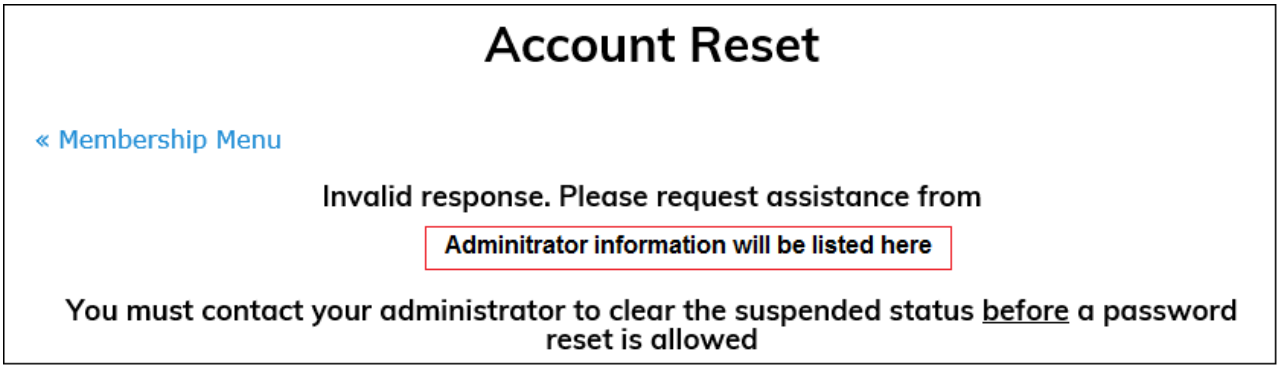
- You will then be routed to the **Account Reset** page.



- If the security question is answered correctly, the suspended status will be removed, and you can either **log in** or **select a new password**.

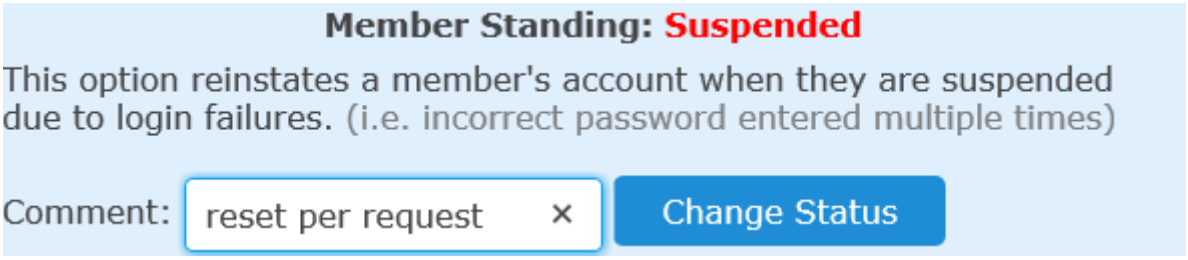


- If you do not answer the question correctly, you will be directed to contact your Administrator.



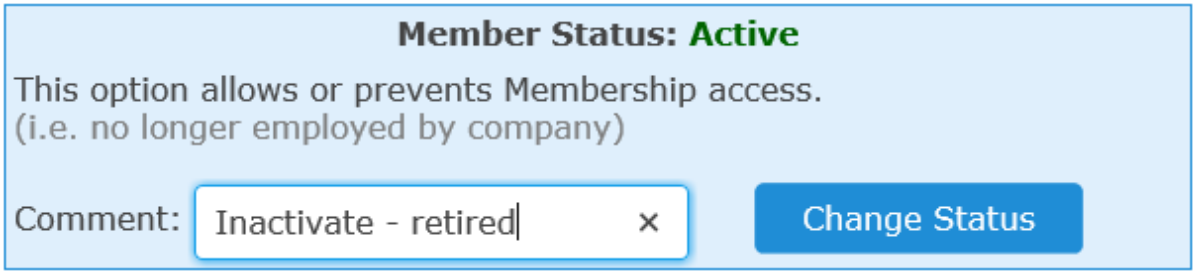
2) **Group Administrator or Administrator Assistance**
The Group Administrator or Administrator can clear suspended accounts by doing the following:

- Log into the website
- Select on the **View Group Members** link from the **Administrator Options**
- Find the suspended member name
- Click the name link to open the member's profile
- Look for the **Member Standing** section displaying the "Suspended" status
- Type in a comment and click the "**Change Status**" button to clear the suspended status



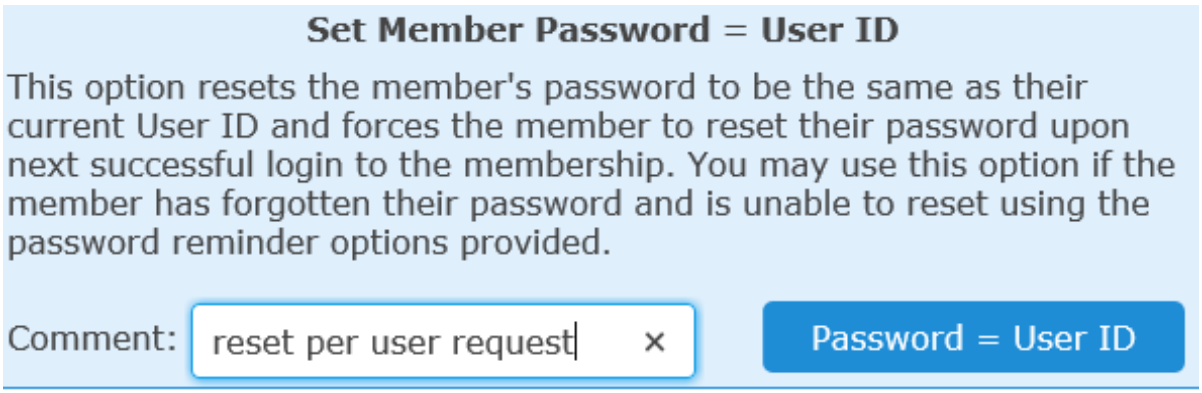
Inactivate or Reactivate An Existing Member Account:
The Group Administrator or Administrator can change an existing account status by doing the following:

- Log into the website
- Select on the **View Group Members** link from the **Administrator Options**
- Find the member name that requires a status change
- Click the name link to open the member's profile
- Look for the **Member Status** section displaying the current status "Active" or "Inactive"
- Type in a comment and click the "**Change Status**" button to either Activate or Inactivate an account



Password Reset:
The Group Administrator or Administrator can help expedite a password reset by doing the following:

- Log into the website
- Select on the **View Group Members** link from the **Administrator Options**
- Find the member name that requires a password reset
- Click the name link to open the member's profile
- Look for the section displaying **Set Member Password = User ID**
- Type in a comment and click the "**Password=User ID**" button to execute the reset
- The user will receive a system generated email to notify them of the reset



Product Permissions:

The Group Administrator and Administrator can add or remove product permissions.

Group Administrators (GA) can change product permissions for any member of their organization except for their own. GAs should contact the WCRB Webmaster if they require a product permission change.

Administrators can only change product permissions for users that they create or that are reassigned to them by the Group Administrator via the Replace Administrator or Move User Administrator Options.

Following are the steps to update product permissions:

- Log into the website
- Select on the **View Group Members** link located in the **Administrator Options** section of the member products page
- Find the member name that requires a change in product permissions
- Click the name link to open the member's profile
- Scroll to the bottom of the page to see the **Add/Remove Products for Members** list
- An 'X' will appear in the Member Products grid if product access has been granted

- Either select the "**Add All Products**" link to grant permissions to all available products or pick and choose specific products by clicking the "**Add/Remove**" links located next to each product listed in the grid

*** IMPORTANT Note to Carrier Members ***

The following Member Product has an extended full edit permission control:
Manage Data

You must DISABLE the view only access in order for members to have full edit permission to this product. By default, when this product is added, the User is granted view only access. Additional steps are required to provide full edit permission.

"**ENABLED**" = View Only Access
"**Disabled**" = Full Access Rights.

Click the word "**ENABLED**" to change the access rights to full edit control
Click the word "**Disabled**" to change the access rights to view only control

Product Description	Selected	Add/Remove	Date Added	View Only Access
Annual Rate Filings	X	Add/Remove	3/27/2023 3:18:59 PM	
Carrier Assessment	X	Add/Remove	3/27/2023 3:18:59 PM	
Carrier Elections	X	Add/Remove	3/27/2023 3:18:59 PM	
Class Code Historical Performance	X	Add/Remove	3/27/2023 3:18:59 PM	
Depopulation Report	X	Add/Remove	3/27/2023 3:18:59 PM	
Employer EXR Worksheet Lookup	X	Add/Remove	3/27/2023 3:18:59 PM	
Experience Modification Calculation	X	Add/Remove	3/27/2023 3:18:59 PM	
Experience Modification Lookup	X	Add/Remove	3/27/2023 3:18:59 PM	
Experience Rating Worksheet	X	Add/Remove	3/27/2023 3:18:59 PM	
Industry Reports	X	Add/Remove	3/27/2023 3:18:59 PM	
Inspection History Lookup	X	Add/Remove	3/27/2023 3:18:59 PM	
Inspection Report	X	Add/Remove	3/27/2023 3:18:59 PM	Disabled
Invoice Information	X	Add/Remove	3/27/2023 3:18:59 PM	
Manage Data	X	Add/Remove	4/24/2024 1:49:34 PM	ENABLED

Full Edit Rights

View Only Rights

Administrator Options:

Group Administrators and Administrators have access to Administrator options. Some of these options are ONLY available to the Group Administrator (See below).

Add Member:

Create and add new member accounts to the membership.

Group Administrators can add Administrator accounts and User accounts.

Administrators can only add User accounts.

To add a new member:

- Log into the website
- Select the **Add Member** option on the Administrator Options menu.
- Select Add
- Complete the member information (all fields are required except phone extension, fax, and comment)
- Click the **Add Member** button.
- If successful, "Member Added Successfully" will appear at the top of the screen
- Select desired products by clicking "**Add/Remove**" for each or by selecting "**Add AllProducts**"
- Select the **Finish** button.
- A system generated notification will be sent to the email address of the new member welcoming them to the WCRB website membership. This email will contain basic instructions and a temporary password.

Edit Member:

Update member account information (Includes: Name, Contact Information, status changes, password resets and product permissions).
Group Administrators can edit any member in their organization's membership
Administrators can ONLY edit profiles for members that they have created.
Follow the on-screen steps to edit the Member Standing, Member Status or Product Permissions.
To edit member information:

- Log into the website
- Select the **Edit Member** option on the Administrator Options menu.
- Search for the last name of the member you wish to edit
- Select the name link for that member from the search results to open their profile
- Update the "Member Information" section
- Click "Update Member Information" button to save changes

Move User (GA Use Only):

The Group Administrator can use this option to move one user from one Administrator to another.

To move a user:

- Log into the website
- Select the **Move User** from the Administrator Options menu.
- Follow the on-screen steps to complete the move

Product Permission Search (GA Use Only):

The Group Administrator can use this option to identify which active members of their organization have access to specific products and check the member's Last Access date of a product. Search by individual products or download all member product permissions in .csv format.

To check a user access dates and product permissions:

- Log into the website
- Select the **Product Permission Search** from the Administrator Options menu.
- Select product from the "search by product" drop down menu, **OR**
- Select Download Permissions to Spreadsheet button

Promote to Administrator (GA Use Only):

The Group Administrators can promote a selected User to be an Administrator. When executing this promotion, the Group Administrator must edit the member account to assign product permissions.

To promote a User to Administrator:

- Log into the website
- Select **Promote to Administrator** from the Administrator Options
- Follow on-screen steps to complete the promotion

Replace Administrator (GA Use Only):

The Group Administrator can replace an existing Administrator with another member. This option is useful when the intent is to move all member accounts associated with a specific Administrator. The new Administrator inherits all the product access rights and all the member accounts from the existing Administrator.

To replace an Administrator:

- Log into the website
- Select **Replace Administrator** from the Administrator Options.
- Follow the on-screen steps to complete the move

View Group Members:

Group Administrators can view all members in a hierarchal view based on administrative permission. Provides three view options: All, Active and Inactive

Administrators cannot view all members. Administrators can only view a list of members they created along with members assigned to them by the GA.

Member Product Available by Organization Type

PRODUCT ACCESS—AGENCY
Class Code Historical Performance
Depopulation Report
Experience Modification Calculation
Experience Modification Lookup
Inspection History Lookup
Invoice Information
Online Assigned Risk Application-Pool Application
Premium Calculation
Schedule Z
WCPAP Calculation
WCPAP Lookup
PRODUCT ACCESS—CARRIER
Annual Rate Filing
Class Code Historical Performance
Depopulation Report
Electronic Submission Tracking
Experience Modification Calculation
Experience Modification Lookup
Experience Rating Worksheet
Inspection History Lookup
Invoice Information
Manage Data (View Only or Full Edit Access)
Premium Calculation
Schedule Z
Servicing Carrier Information
WCPAP Calculation
WCPAP Lookup
WCPAP Worksheet
PRODUCT ACCESS—EMPLOYER
Experience Modification Calculation
Online Assigned Risk Application-Pool Application
Premium Calculation
WCPAP Calculation