WEB SITE MEMBER USER GUIDE

The WCRB Web site 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 apply providing 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 Web site. 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 Web Site Access" for the detailed product listing by organization type.

The WCRB Web site 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.
o The Group Administrator has access to all member accounts for their organization.

o The Group Administrator is responsible for creating, maintaining and inactivating Administrator and User accounts. (Note that accounts cannot be deleted, only inactivated)

o The Group Administrator determines which products Administrators and Users will have access to.

• Administrators:
  
  o Administrators are created by the Group Administrator.
  
  o Administrators can create and maintain User accounts.
  
  o 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.
  
  o Administrators cannot see nor modify any user profile created by any other Administrator.
  
  o 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:
  
  o 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 Web site they can select the “Who’s My Group Administrator” 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 web site
• 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 Web site 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 you account is suspended the message will appear below.
- Select the [Click here](#) link

```markdown
Your account has been suspended.
Click here to resolve your suspended status or request assistance from your Administrator or Group Administrator. Please request assistance from Administrator will be listed here
```
• You will then be routed to the Account Reset page.

![Account Reset Form]

To clear the suspended status, answer the question below

Security question: Security question will be listed here.
Answer the above question:

Reset your account

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

![Account Reset Confirmation]

Correct. Your suspended status has been removed. Try to Log in again or Select new password.

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

![Account Reset Error]

Invalid response. Please request assistance from Administrator information will be listed here

You must contact your administrator to clear the suspended status before a password reset is allowed.
2) **Group Administrator or Administrator Assistance**

   The Group Administrator or Administrator can clear suspended accounts by doing the following:

   - Log into the Web site
   - 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

**Member Standing: Suspended**

This option reinstates a member's account when they are suspended due to login failures. (i.e. incorrect password entered multiple times)

Comment: [reset per request](#)  [Change 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 Web site
- 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

**Member Status: Active**

This option allows or prevents Membership access. (i.e. no longer employed by company)

Comment: [Inactivate - retired](#)  [Change Status](#)
Password Reset:
The Group Administrator or Administrator can help expedite a password reset by doing the following:

- Log into the Web site
- 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

Set Member Password = User ID
This option resets the member’s password to be the same as their current User ID and forces the member to reset their password upon next successful login to the membership. You may use this option if the member has forgotten their password and is unable to reset using the password reminder options provided.

Comment: reset per user request
Password = User ID

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. GA’s 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 Web site
- 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 two Member Products have an extended full edit permission control:
Manage Policy
Manage USR

You must DISABLE the view only access in order for members to have full edit permission to these two products. By default, when these products are 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

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Selected</th>
<th>Add/Remove</th>
<th>Date Added</th>
<th>View Only Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Rate Fillings</td>
<td>X</td>
<td>Add/Remove</td>
<td>7/22/2007 2:02:59 PM</td>
<td></td>
</tr>
<tr>
<td>Invoice Information</td>
<td>X</td>
<td>Add/Remove</td>
<td>4/17/2004 10:38:25 PM</td>
<td></td>
</tr>
<tr>
<td>Manage Policy</td>
<td>X</td>
<td>Add/Remove</td>
<td>7/10/2017 11:36:12 AM</td>
<td>ENABLED</td>
</tr>
<tr>
<td>Manage USR</td>
<td>X</td>
<td>Add/Remove</td>
<td>7/10/2017 11:36:13 AM</td>
<td>disabled</td>
</tr>
<tr>
<td>NTC Lookup</td>
<td>X</td>
<td>Add/Remove</td>
<td>1/2/2004 12:35:24 PM</td>
<td></td>
</tr>
</tbody>
</table>
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 Web site
- 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 All Products”
- Select the Finish button.
- A system generated notification will be sent to the e-mail address of the new member welcoming them to the WCRB Web site membership. This e-mail 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 organizations 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 Web site
- 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:
  o Log into the Web site
  o Select the Move User from the Administrator Options menu.
  o Follow the on-screen steps to complete the move

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:
  o Log into the Web site
  o Select Promote to Administrator from the Administrator Options
  o 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:
  o Log into the Web site
  o Select Replace Administrator from the Administrator Options.
  o 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

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<tr>
<td>Depopulation Report</td>
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<tr>
<td>Experience Modification Calculation</td>
</tr>
<tr>
<td>Experience Modification Lookup</td>
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<tr>
<td>Inspection History Lookup</td>
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<tr>
<td>Invoice Information</td>
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<tr>
<td>Online Assigned Risk Application-Pool Application</td>
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<tr>
<td>Premium Calculation</td>
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<tr>
<td>Schedule Z</td>
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<tr>
<td>WCPAP Calculation</td>
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<td>WCPAP Lookup</td>
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<td>Class Code Historical Performance</td>
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<tr>
<td>Depopulation Report</td>
</tr>
<tr>
<td>Electronic Submission Tracking</td>
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<tr>
<td>Experience Modification Calculation</td>
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<tr>
<td>Experience Modification Lookup</td>
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<tr>
<td>Experience Rating Worksheet</td>
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<tr>
<td>Inspection History Lookup</td>
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<tr>
<td>Invoice Information</td>
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<tr>
<td>Manage Policy (View Only or Full Edit Access)</td>
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<tr>
<td>Manage USR (View Only or Full Edit Access)</td>
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<td>Premium Calculation</td>
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<td>Schedule Z</td>
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<td>Servicing Carrier Information</td>
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