WCRB

Wisconsin Compensation Rating Bureau

Manage Data User Guide

Effective: April 1, 2024

Last Updated: 6/11/25

Contents

<u>**Before You Start...**</u>

Welcome to the Manage Data web application! The Manage Data application is available through the online portal that allows data reporters to submit, track, and edit their workers' compensation data in real time. The tool provides carriers with a single platform to access and submit both policy and unit statistical data with real time validations. From the policy side, view stored policy data, modify existing policies, and create new policies. From the unit side, view, create, correct, and replace USR data. Manage Data also has features to provide insight into error and rejection reasons.

Learn how to use this powerful online tool. Manage Data was designed to be user-friendly and easy-to-use, but if problems arise, refer to this guide for help.

Now let's get started!

Cookies

Manage Data uses **session cookies** to remember important information as a user moves from page to page within the application. These session cookies reside in the browser's memory only as long as the browser session is active. In other words, when the user closes the web browser after using Manage Data, the session cookie is destroyed, thus protecting any data they entered while using Manage Data.

<u>**Note**</u>: Many web applications use **standard cookies** - a standard cookie is written to the user's hard drive and is used to remember them next time they visit the application's website. Manage Data uses session cookies, not standard cookies, so no data is written to their hard drive (unless they request to download a file).

Opening New Windows

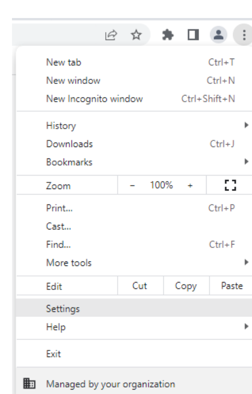
Some pages open, or spawn, a new browser window when accessed. For example, when printing a report, a new window is spawned. Remember to close the new window to exit and return to the previous window in Manage Data.

Configuring Pop-up Blocker

If a pop-up blocker is installed, allow pop-ups from the WCRB website. To allow pop-ups from the WCRB website using Google Chrome, follow these procedures:

Step 1:

Open **Google Chrome**. Click on the **More** icon in the top right corner. Select **Settings** from the Tools list. Based on the browser version, the view may look different.

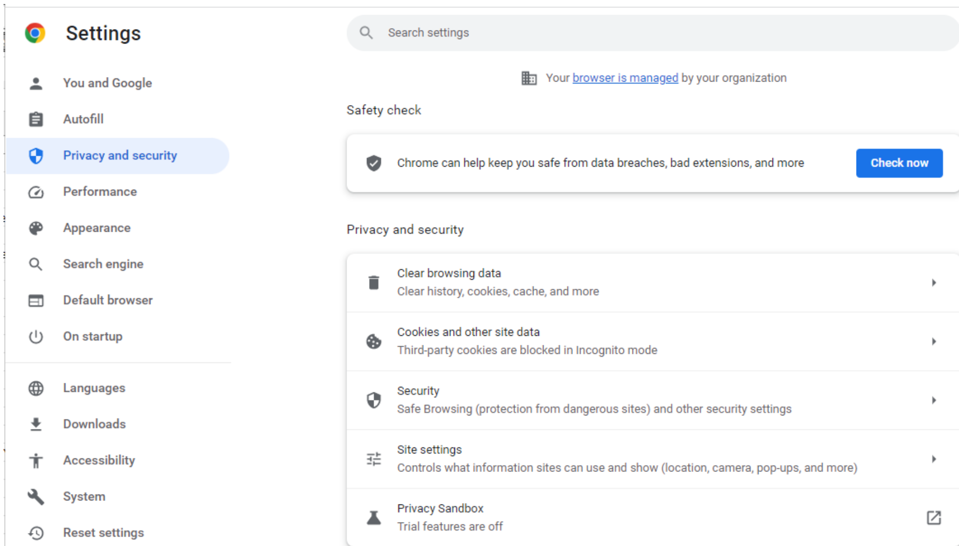


Step 2:

In the **Settings** window, select the **Privacy and Security** tab.

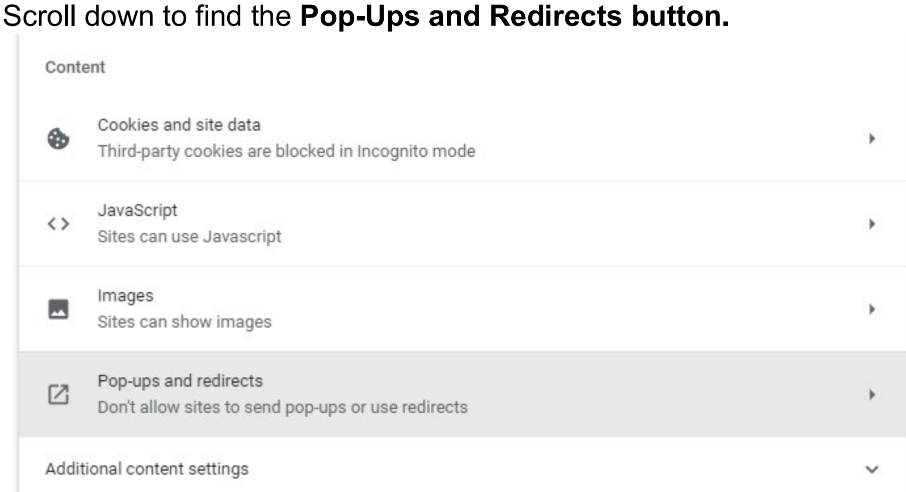
Step 3:

On the **Privacy and Security** tab, click the **Site Settings** button.



Step 4:

Scroll down to find the **Pop-Ups and Redirects button.**

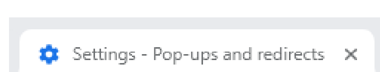


Step 5:

Under Customized behaviors click the Add button. In the Add a Site pop-up, Type http://www.wcrb.org in the **Site** field to allow and click **Add**.

Step 6:

Close this window using the X in the right side of the tab.



System Timeout

Manage Data times out after it has been inactive for more than thirty minutes. A message may display indicating that the user must log into the system again.

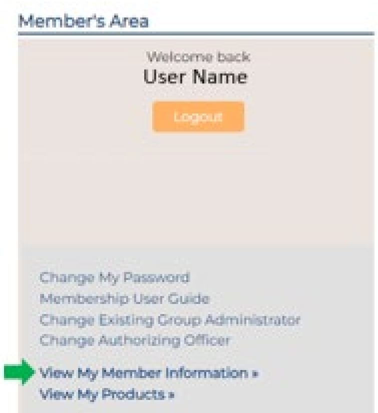
PDF Documents

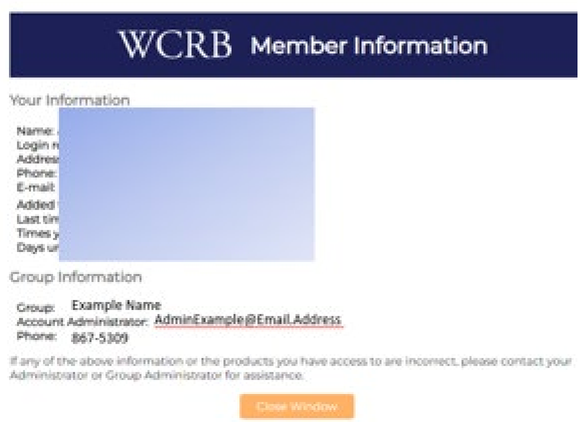
Manage Data supplies some forms and reports in pdf (Portable Document Format) form. To read pdf documents, a pdf reader, like Adobe Acrobat Reader™, must be installed.

Download Acrobat Reader free of charge at http://www.adobe.com.

Group Administrators

It is the Group Administrators (GA) responsibility to grant users access to Manage Data within the WCRB member page. To find your GA, go to View My Member Information and look under Group Information.





Accessing Manage Data

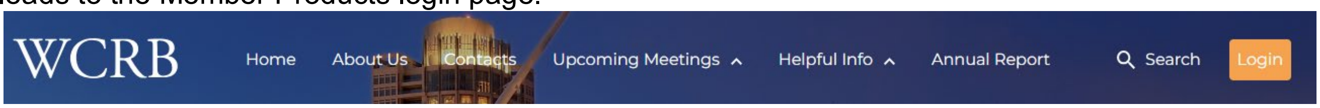
Access Manage Data from the WCRB Membership Products area of WCRB Web site. This section describes how to get to the Login page, enter credentials, and access Manage Data.

Logging into the WCRB Member Products

The Member Products portal will provide access to the secured applications and data on the WCRB website. Log on to the Member Products area to access Manage Data. To login to the Member Products area, use the following procedure.

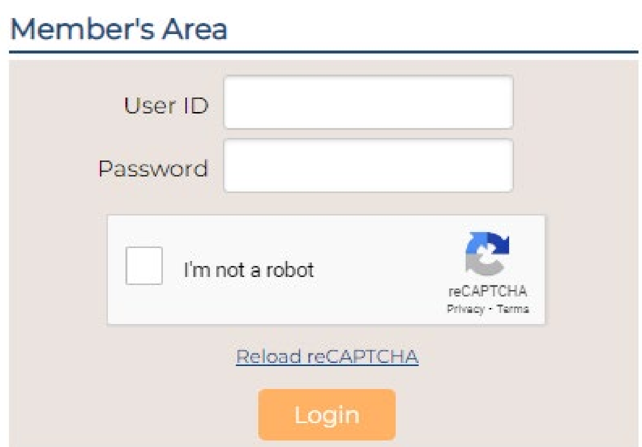
Step 1:

On the WCRB website (http://www.wcrb.org), click the Login button in the upper right corner. This leads to the Member Products login page.



Step 2:

Enter Login ID and password and select the "I'm not a robot" box to complete the reCAPTCHA. Click the Login button below the reCAPTCHA. This goes to the WCRB Member Products page.



Note: If an incorrect username or password is entered, the system will return an error message. The system will lock if incorrect information is entered more than 5 times. It is recommended to reset password with "Forgot My Password" link below the login fields before entering incorrect information a fifth time.

Step 3:

Find and click Manage Data in the Products List. The application will launch in a separate browser window.

Note: The Secured Members Area is the common place from which all secured applications are accessed on the WCRB website. The user will only see applications they have been authorized to access. Contact your Group Administrator if you require access to Manage Data and do not see it in your Products List.

Navigating Manage Data

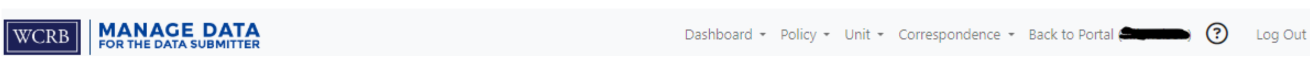
The application page displays the default dashboard for a user type – either Data Submitter or Underwriter. The widgets may look different between the two dashboards.

There are multiple ways to navigate Manage Data. From the main screen is a row of tabs at the top called the Navigation Menu. These tabs have drop downs that will navigate to different sections of the application.

When first logging into Manage Data, the landing page is called the Dashboard. This is a page of widgets that display high level information for the carrier and provides easy access to different sections of the application. Located throughout Manage Data are hyperlinks. These hyperlinks easily navigate to different pages in the application to complete common processes.

Navigation Menu

The top right row in Manage Data is called the navigation menu. The navigation menu allows easy access to the different sections of the application: Dashboard, Policy, Unit, and Correspondence. Regardless of location in the application, the navigation menu will appear at the top of the screen.



- **Dashboard Tab** Navigate to either the Data Submitter or Underwriter Dashboards.
- **Policy Tab** Create a new policy transaction, complete a real time search for policy information and complete a submission search for policy errors and rejections.
- **Unit Tab** Add and correct unit statistical data. Search by unit statistical report, claims, unit statistical tracking and submissions.
- **Correspondence Tab** Search and view all correspondence for USRs and NTCs.
- **Back to Portal Tab** Return to the Members Secured Area page of the WCRB web portal.
- The ⓘ icon provides contact information for the Wisconsin Compensation Rating Bureau.

Embedded Links

Located throughout Manage Data are embedded links also known as hyperlinks. These links easily navigate to different sections of the database. They are identifiable by their alternate text color and when hovered over, they underline and change the mouse arrow to a hand.

Policy Number: When the policy number is linked, click and go to the View Policy Information page. See all the data elements of the policy transaction.

TXN (Transaction) Code: When the TXN code is linked, select it and navigate to the View Transaction page. See the individual policy transaction data.

Rpt. No. (Report Number): When the Report Number is hyperlinked, select it and navigate to the View Unit Stat Report. See submitted Unit Statistical Report data and make corrections.

Submission ID: When the Submission ID is hyperlinked, select it to navigate to the Policy Search screen to see all transactions for that submission and see their correlating status.

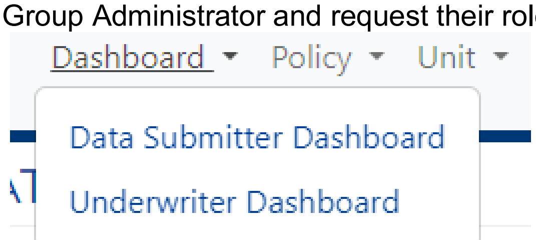
Edit ID: When the Edit ID is hyperlinked, view a full description of the edit in a new window.

Insured Name: When the Insured Name is hyperlinked, select it and navigate to the Employer Chronicle page. See employer information, such as the experience modification.

Address: When the Address is hyperlinked, select it to Google Maps to see the physical location of the employer.

Dashboard Use

The landing page for the Manage Data application is called the Dashboard. If the Group Administrator grants full-edit rights to the user, they will see the Data Submitter Dashboard. If the Group Administrator grants view-only rights to the user, they will see the Underwriter Dashboard. If the user's role requires access to all dashboards, they will see a drop down on the navigation menu and they can navigate between them. If the user does not see the drop down, they can contact their Group Administrator and request their role be adjusted.



The dashboard is an intuitive interface that is user-friendly and customizable to meet carrier needs. The dashboard allows carriers to see their data at a high level, while also allowing users to identify and execute multiple tasks.

The dashboard is customizable for viewing the widgets on the dashboard. Select the pencil at the lower section of the screen to change where the widgets sit on the dashboard. Click and drag the most used widgets to the top of the screen, or least used to the bottom. Resize by pulling the arrows in the lower right corner of boxes that allow it. Not all widgets can be adjusted by size.

Once the customization is complete, select the ✓ to accept the changes or ✗ to reject the changes. If the changes are accepted the dashboard view will remain the same until changed again.

Below is a breakdown of each widget on the dashboard, and its functionality.

Data Submitter Dashboard

The Data Submitter Dashboard allows users to enter data, search, and view. It contains the widgets:

- Experience Rating Search
- External Applications
- My List
- Notifications
- NTC Search
- Outstanding Assigned Risk Policies
- Ratio of Rejected Policy Transactions
- Ratio of Rejected USRs
- Search
- Top 10 Policy Edit Failures
- Top 10 USR Edit Failures
- Tracking by Category
- USR Correspondence Search
- WCPOLS/WCSTAT Queue
- WCPOLS/WCSTAT Upload
- WCPOLS/WCSTAT Test Validation

Underwriter Dashboard

The Underwriter Dashboard functions in the same way the Data Submitter Dashboard does. It allows carriers to see data at a high level and manage accordingly. The Underwriter Dashboard has many of the same features – Search, Notifications, USR Correspondence Search, External Applications, and Experience Rating Search.

Data Retention

The processed data available to search/view in Manage Data include:

Policy data	5 years
Unit Stat data	5 years
CPAP Worksheets	5 years
Experience Rating Worksheets	10 years
Inspection Reports	10 years
Correspondence	
NTCs	5 Years
Unit Stat Correspondence	Once a unit is accepted the correspondence related to the unit will no longer be available to view
Unsubmitted transactions	Imported transactions that are left IN PROGRESS or left in VALIDATED status (this is equivalent to UNSUBMITTED), are purged in 90 days

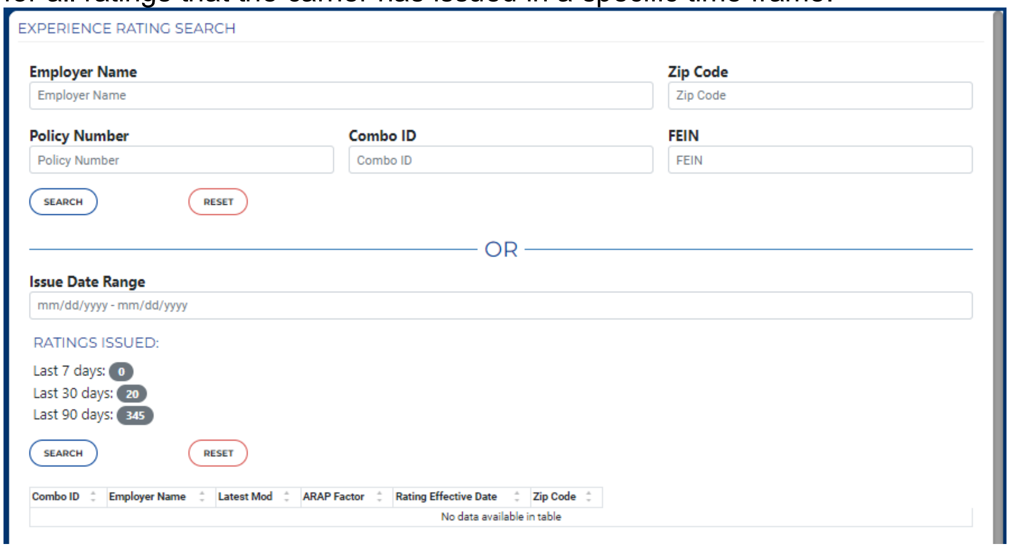
Widgets

There are multiple Unit Statistical Report and Policy Transaction analytics on the Manage Data Dashboard. The Underwriter Dashboard does not have analytics widgets as it is designed to be a search and view landing page. Most widgets provide real time information on the data to help manage data submissions. Some widgets may have a time delay, such as the Tracking by Category widget, which is updated nightly and is labeled with the time increment.

Widgets and their descriptions are listed alphabetically.

Experience Rating Search Widget

This widget allows carriers to search for a specific employer's experience rating or do a search for all ratings that the carrier has issued in a specific time frame.



The top half of the widget allows input of multiple search parameters to locate a specific employer's experience rating. The bottom half of the widget allows a search for all experience ratings that carrier has issued within a specified time frame. To do so, enter criteria in the Issue Date Range.

Employer Name: Input the employer's name.

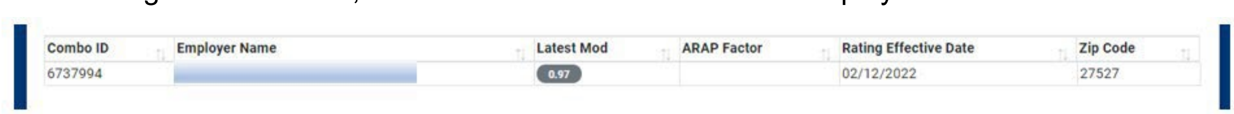
Zip Code: Input a zip code to narrow down the results.

Policy Number: Input the policy number for the employer.

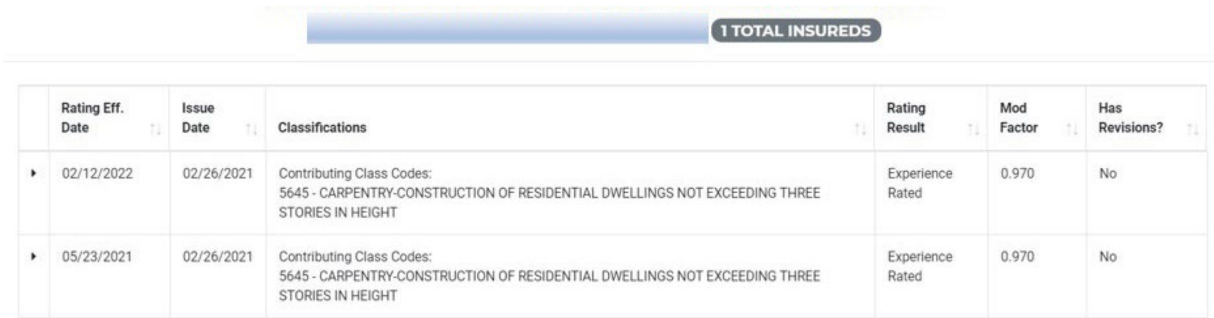
Combo ID: Input the Combo ID for the employer.

FEIN: Input the FEIN for the employer.

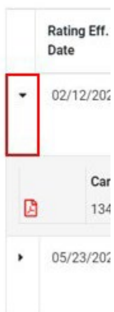
After adding search criteria, select Search and the results will display.



In the Latest Mod column of the search results there is a badge. By clicking on the badge, the system will navigate to the stored experience rating history of the employer.

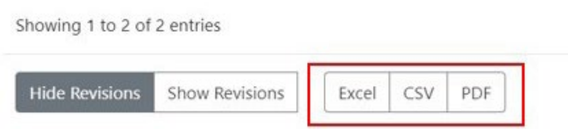


	Rating Eff. Date	Issue Date	Classifications	Rating Result	Mod Factor	Has Revisions?
▸	02/12/2022	02/26/2021	Contributing Class Codes: 5645 - CARPENTRY-CONSTRUCTION OF RESIDENTIAL DWELLINGS NOT EXCEEDING THREE STORIES IN HEIGHT	Experience Rated	0.970	No
▸	05/23/2021	02/26/2021	Contributing Class Codes: 5645 - CARPENTRY-CONSTRUCTION OF RESIDENTIAL DWELLINGS NOT EXCEEDING THREE STORIES IN HEIGHT	Experience Rated	0.970	No

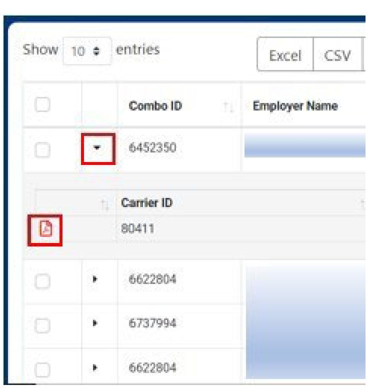


Selecting the arrows to the far left drills down into the specific rating information for each policy period. After selecting one of the arrows to expand a specific rating, find a PDF icon. Clicking this icon will generate a copy of the experience rating worksheet for that employer, for that policy period.

There is the option to export the information to an Excel, CSV, or PDF file.



The widget displays pre-selected time frames with a badge. Clicking on the badge will navigate to the experience rating search screen where the results will display.



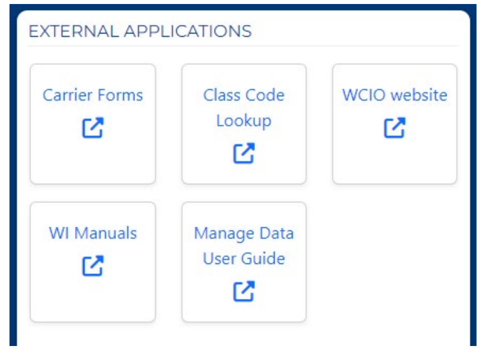
Clicking the arrow on the far left will display a drop down to show additional information about the employer's experience rating for a specific policy period.

Clicking the PDF icon will generate a copy of the experience rating worksheet for that employer for that policy period.

***Note:** The carrier will only be able to see ratings for an employer if they are the carrier on record for the policy.

External Applications Widget

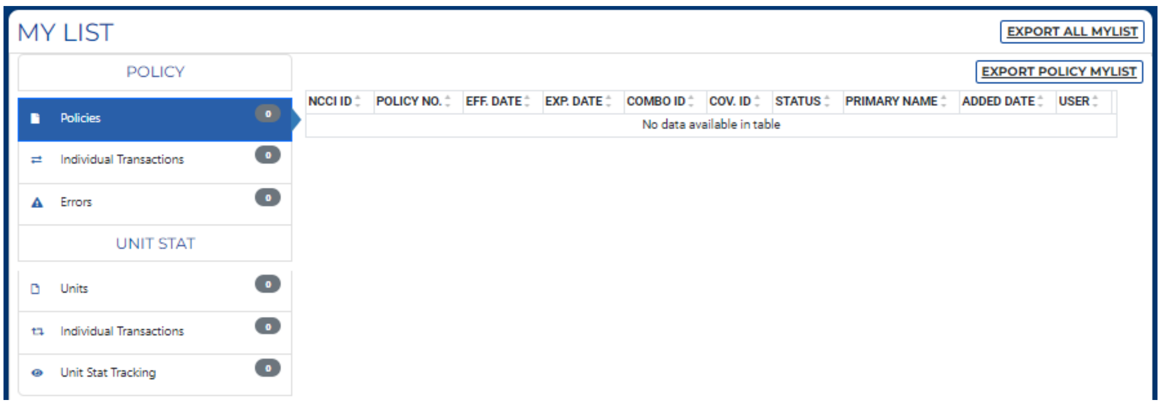
The external applications widget leads to common applications outside of Manage Data.



By selecting an application from the widget, the system will open a new tab/window and navigate to the application.

My List Widget

The My List widget displays transactions added using the (+) buttons located throughout Manage Data. It was designed to create a shortcut for items the user is working on or wants to monitor. This tool will help to quickly locate the policy or unit transaction without the need to search for them again. The My List widget can be used like a personalized work queue.



Navigate between the tabs on the left to view the transactions associated with either policy or unit.

Policy:

Unit Stat:

After selecting a category from the left, a table will display to the right in a sortable grid with columns. The table has the following information for the transactions: NCCI ID (aka Carrier ID), Policy #, Effective Date, Expiration Date, Combo ID, Coverage ID, Status, Primary Name, Added Date, and User.

Adding Items

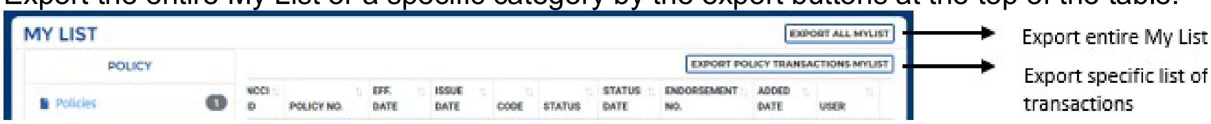
Add items to My List by selecting the green plus sign on a listed item in a grid. New policy transactions and new USR transactions should automatically add to My List.

Removing Items:

The items placed on the My List will stay on their list until removed. To remove the item from the My List Widget, select the located at the far right of the table.

Exporting Lists:

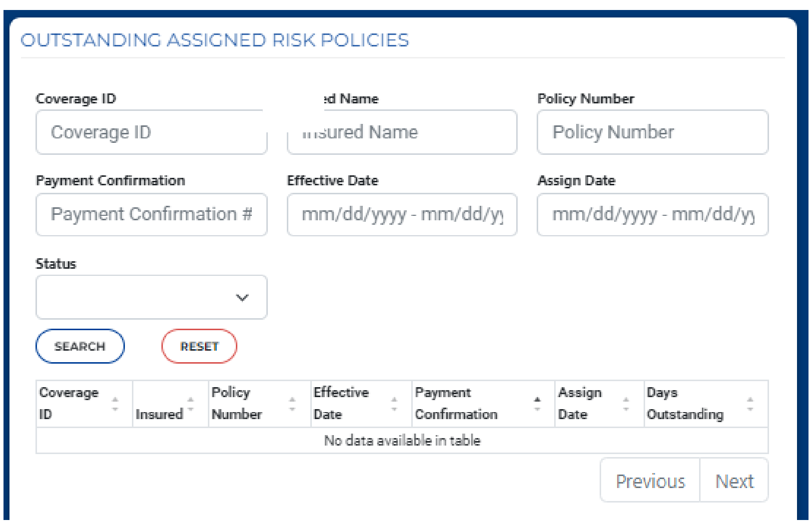
Export the entire My List or a specific category by the export buttons at the top of the table.



This generates an Excel spreadsheet with each tab on its own worksheet with column headers.

Outstanding Assigned Risk Policies Widget

This widget only pertains to Pool Carriers. Search for a specific outstanding assigned risk policy. Inputting information into the fields will generate a grid of results.



Coverage ID: Input the Coverage ID.

Insured Name: Input an employer name.

Policy Number: Input the policy number.

Payment Confirmation: Input the payment confirmation number.

Effective Date: Input a date range.

Assign Date: Input the range for the date the Servicing Carrier is assigned an employer.

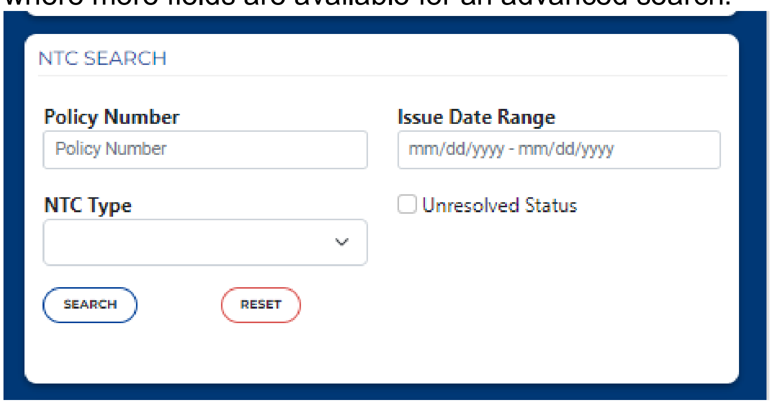
Status: Select from the dropdown.

Notifications Widget

The notifications widget is located at the top right corner of the dashboard. The Wisconsin Compensation Rating Bureau is not using this widget at this time.

NTC Search Widget

This widget allows carriers to search for a specific NTC using Policy Number, Issue Date Range, NTC Type, and an Unresolved Status filter. It navigates to the NTC Search under the Correspondence Tab, where more fields are available for an advanced search.



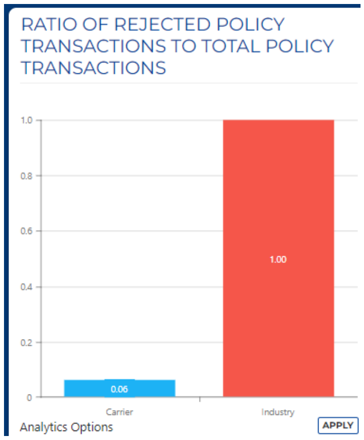
Policy Number: Input the policy number for the employer.

Issue Date Range: Input the date range.

NTC Type: Select a type – Mandatory or Advisory.

Unresolved Status: Filter by unresolved status.

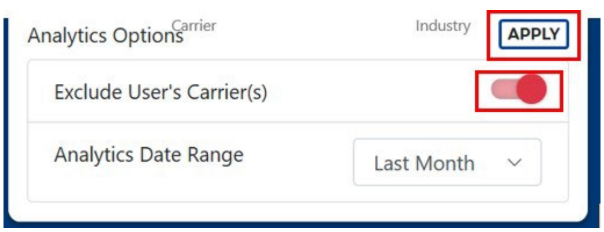
Ratio of Rejected Policy Transactions to Total Policy Transactions Widget

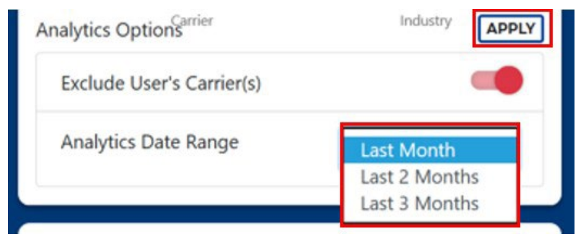


This analytics widget shows the ratio of the carrier's rejected policy transactions to all policy transactions that have been submitted. Displayed next to that is the same ratio for the industry as a whole.

This widget can be customized to exclude the user's carrier from the graph. Click the Exclude User's Carrier button and hit Apply to see the changes in the graph.

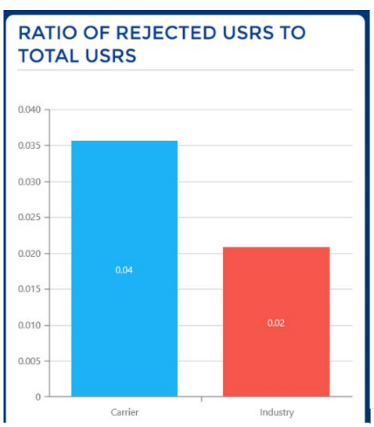
***Note** that the scale of difference may sometimes be very small as the Y axis adjusts automatically.





The Analytics Date Range can also be customized. Select the date range from the drop down and click Apply to see how the company is doing compared to prior time frames.

Ratio of Rejected USRs to Total USRs Widget



This analytics widget shows the ratio of the carrier's failed transactions to all transactions that have been submitted. Displayed next to that is the same ratio for the industry as a whole.

This widget can be customized to exclude the user's carrier from the graph. Click the Exclude User's Carrier button and hit Apply to see the changes in the graph.

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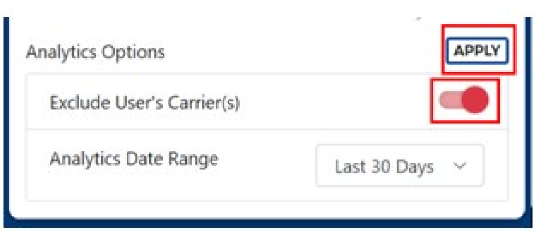
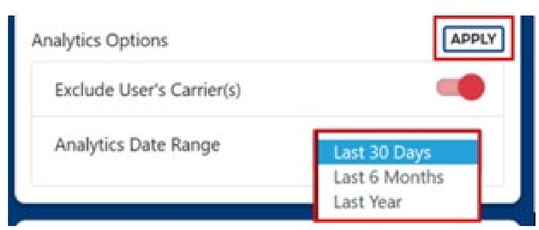
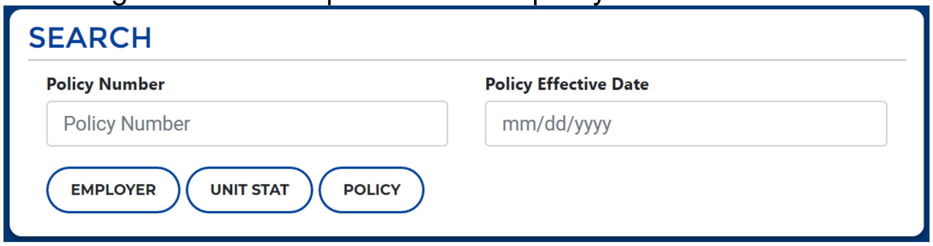




The Analytics Date Range can also be customized. Select the date range from the drop down and click Apply to see how the company is doing compared to prior time frames.

Search Widget

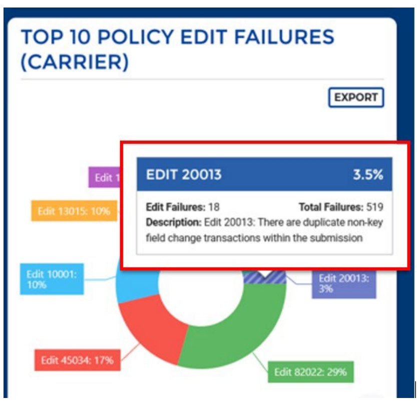
This widget allows for a quick search for policy and unit statistical data stored in Manage Data.



Input a policy number and select one of the following buttons: Employer, Unit Stat or Policy.

- The **Employer Button** leads to the Employer Chronicle for that policy.
- The **Unit Stat Button** leads to the Unit Stat Report Search page or the Unit Stat Tracking Search page, depending on if the unit has been submitted or not.
- The **Policy Button** leads to the Policy Search page.

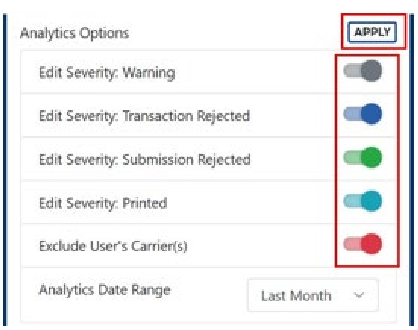
Top 10 Policy Edit Failures (Carrier) Widget

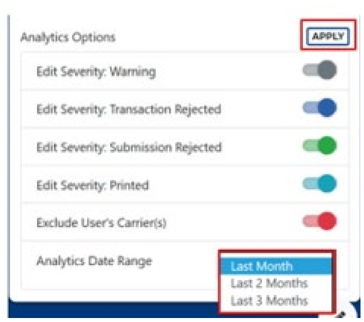


This widget has two parts. The first shows the top 10 policy edit failures the specific user's company has. The second part shows the top 10 policy edit failures of the industry as a whole.

Hover over pieces of the graph to get additional information in a tool tip. There are options to customize the information in the graph at the bottom of the widget. The severity level can be changed. The user's carrier can be included/excluded from the industry totals.

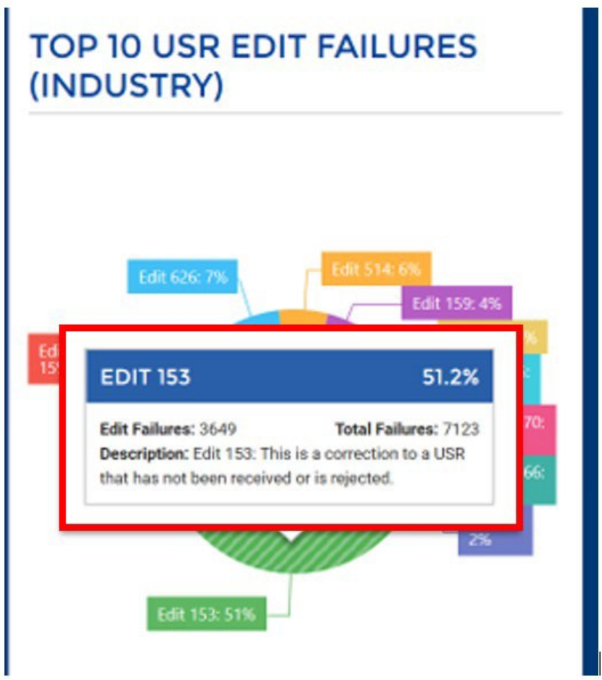
To remove Informational Edits, Transactions Rejected, Submissions Rejected, or Printed Edits, toggle the Edit Severity and click Apply. That will add or delete from the graph. The same can be done to include or exclude the carrier.





The Analytics Date Range can also be customized. Select the date range from the drop down and click Apply to see how the company is doing compared to prior time frames.

Top 10 USR Edit Failures (Carrier) Widget



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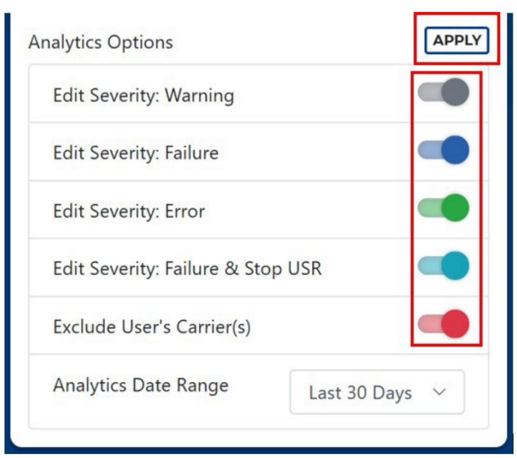
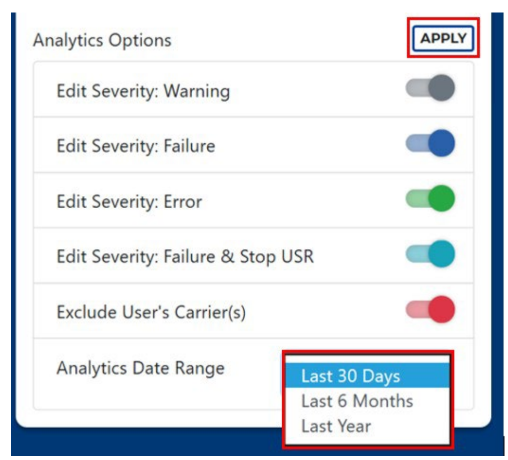


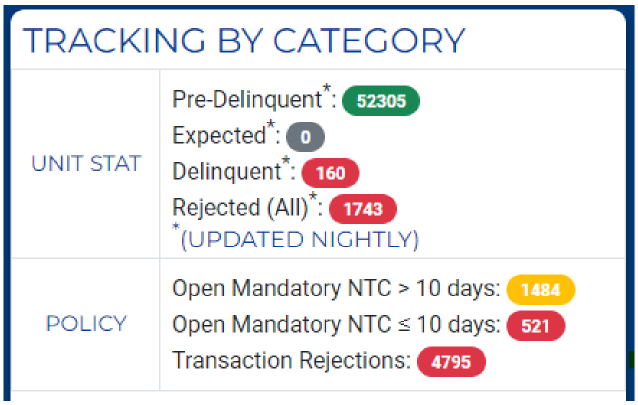


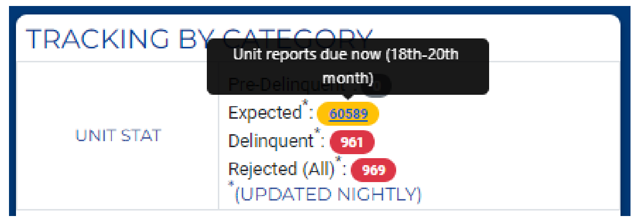
The Analytics Date Range can also be customized. Select the date range from the drop down and click Apply to see how the company is doing compared to prior time frames.

Tracking By Category Widget

The Tracking By Category widget summarizes at a high level the number of unit statistical errors, open mandatory NTCs, or rejected policy transactions. This widget is updated nightly and is not intended to function as a work queue.

The colored badge next to each category shows the number of units in that category. Hovering over the badge defines what items can be found in that category. Clicking on a badge will navigate to either the Unit Stat Tracking Search, Policy search, or NTC search page with the individual results displayed. If there are a large volume of records, the grid will read “Loading…” until the process is complete.





***NOTE:** The maximum returned number of units is set to 5,000 to prevent loading lag time. If the number of expected USRs displayed in the badge were greater than 5,000, only the first 5,000 would show when clicked on for further details. Use the search page to select criteria to find units.

Unit Stat:

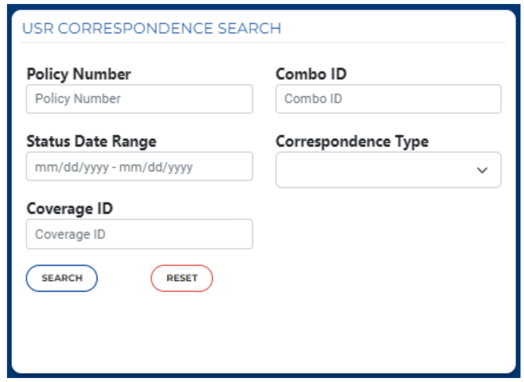
- Pre-Delinquent: Unsubmitted unit statistical reports that are approaching their due date.
- Expected: Unsubmitted unit statistical reports that are due.
- Delinquent: Unsubmitted unit statistical reports that are due and are **accumulating fines.**
- Rejected: Submitted unit statistical reports that were rejected and are **subject to fining**.

Policy:

- Open Mandatory NTC > 10 days: Open Mandatory NTCs with approaching due dates greater than 10 days.
- Open Mandatory NTC ≤ 10 days: Open Mandatory NTCs with approaching due dates 10 days or less.
- Transaction Rejections: A count of Policy Transaction Rejections from the past 90 days. Please note this will not change if the rejected transaction is resubmitted and accepted.

USR Correspondence Search Widget

The USR Correspondence Search widget allows a search for all letter communications that have been sent to the carrier from the Wisconsin Compensation Rating Bureau. Input search criteria to locate the correspondence needed.



Policy Number: Add the information to search for all correspondence for that specific policy.

Combo ID: Add the combo ID of the employer.

Status Date Range: Add a date range to find all correspondence issued during that time.

Correspondence Type: Select a specific type of correspondence from the drop-down menu.

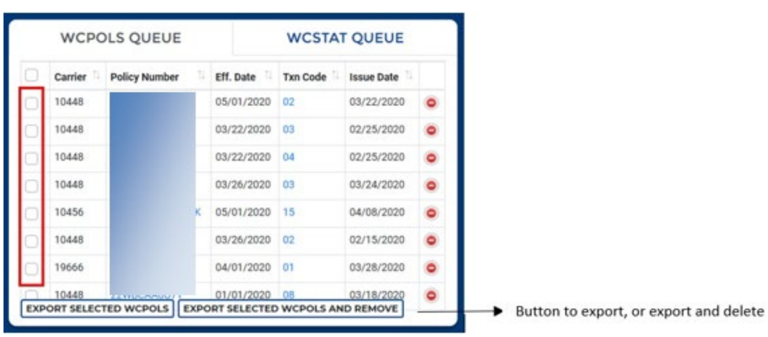
Coverage ID: Add the Coverage ID of the employer.

After adding search criteria, select the search button. The system will navigate to the Correspondence Search results page. This leads to the same page as the Correspondence button on the navigation menu. Steps for this process and detailed information on the results page are located here.

WCPOLS/WCSTAT Queue Widget

The WCPOLS/WCSTAT Queue allows the user to view policies and/or unit statistical reports created during a data entry session. This allows users to export all new policies or new USRs as one single WCPOLS or WCSTAT file for internal use. Navigate back and forth between WCPOLS and WCSTAT from the tabs at the top of the widget. To upload the policy or unit statistical report, see the steps below in WCPOLS/WCSTAT Upload Widget.

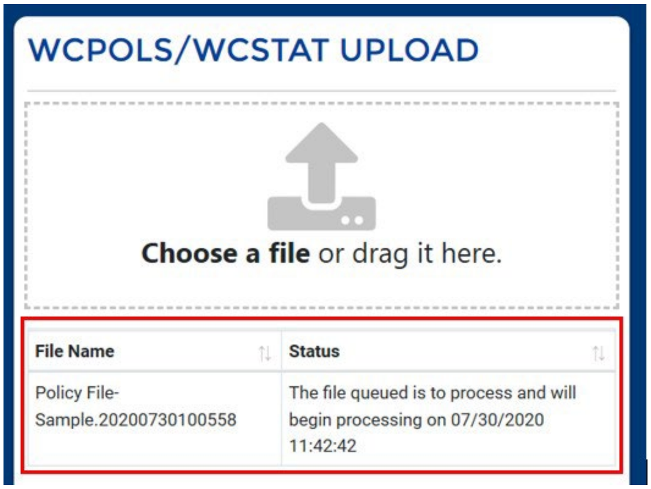
Once all policies have been added to their WCPOLS or WCSTAT queues, export them in the WC format. Select the policies from the left-hand side of the screen, and then use the buttons at the bottom of the widget.



- Export Selected WCPOLS: Export selected policies to the WC format, but the policy remains on the widget until deleted with the red (-) button on the right-hand side.

- Export Selected WCPOLS and Remove: Export selected policies to the WC format and delete the selected policies from the widget.

WCPOLS/WCSTAT Upload Widget

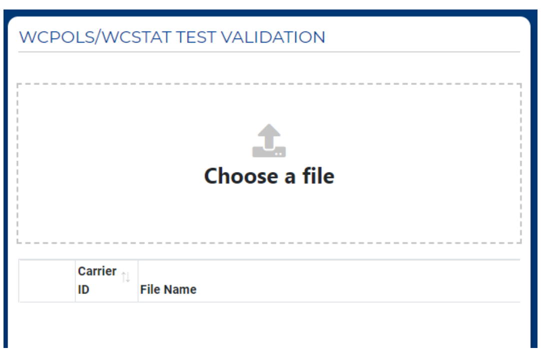


The next widget is the WCPOLS/WCSTAT Upload widget. Carriers can import WC files to the Wisconsin Compensation Rating Bureau Files uploaded using the WCPOLS/WCSTAT upload widget will be processed overnight in batch.

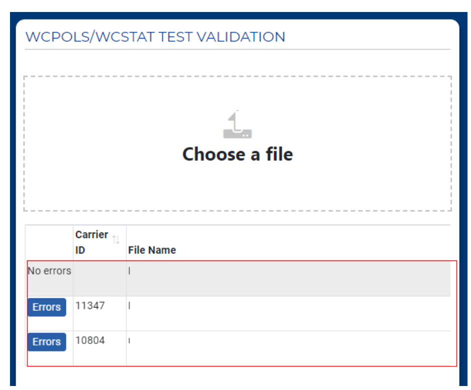
To upload the file, click and drag the file, or select the “Choose a File” box to browse the computer for the file.

Once the file is selected, the file name and status will show at the bottom of the widget. The WCRB does not retain or keep the file to be downloaded later.

WCSTAT Test Validation Widget



The WCPOLS/WCSTAT Test Validation widget allows users to run edits on the file prior to submitting. Adding a file in this widget only validates the file. <u>The data from the file will not get loaded into the system using this Test Validation widget</u>. Use the WCPOLS/WCSTAT Upload widget to upload data into Manage Data. The Wisconsin Compensation Rating Bureau **highly recommends using this validation test to confirm the file is correct prior to submission.**



To upload the file, click and drag the file, or select the “Choose a File” box to browse the computer for the file.

Once a file has been uploaded the system will validate for any errors. Results display at the bottom of the widget with the response listed on the left-hand side.

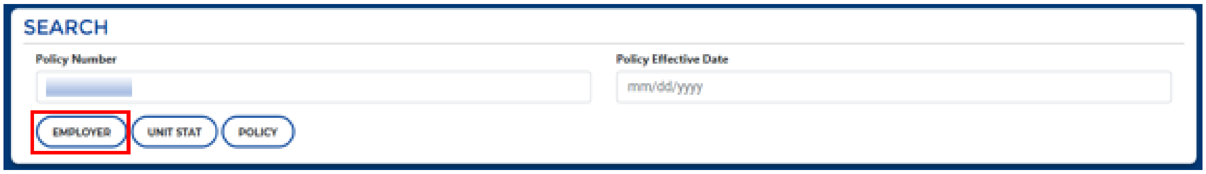
Correct any errors identified and revalidate the file until it displays “No Errors”. Once no errors are confirmed, use the WCPOLS/WCSTAT upload tool to submit the file to the Rating Bureau.
To remove files from the Test Validate widget, use the red minus icon.

<u>*Note:</u> To make corrections to errors and resubmit a file for validation, <u>change the file name</u>. Once a file name has been validated, it cannot be revalidated under the same name.

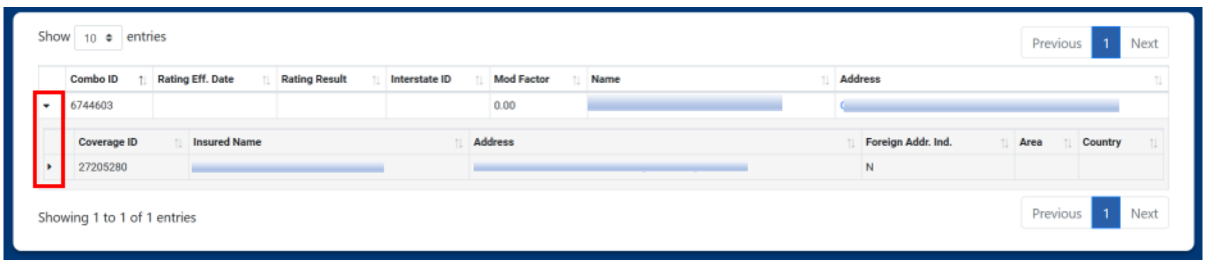
Employer Chronicle

Manage Data provides a tool called the Employer Chronicle which shows the carrier the latest employer information at the combinable group level.

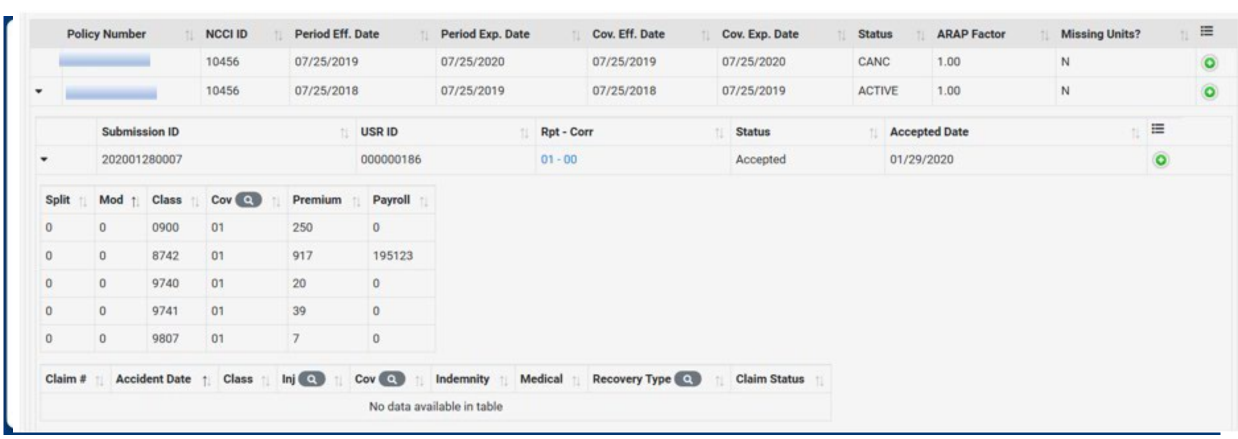
To access the Employer Chronicle, input the policy number in the Search widget on the dashboard and select the Employer button.



Results show the latest rating information, the primary name, and the address for the insured. Expanding the row on the left shows all the Coverage IDs under this combo group.



Expanding the rows further displays all of the carriers' policies related to that employer contained in our records. Continuing to open the rows furthers the details of this policy. If unit statistical reports were filed, they will also be displayed here.

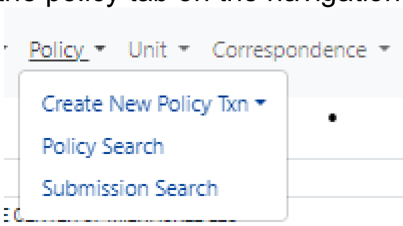


Click on the Rpt-Corr (Report Correction) hyperlink to view the unit report, or the green plus sign icon to add it to the My List widget on the dashboard.

Tabs

Policy Tab

Search for a policy, policy transaction, or submission, and create new policy transactions from the policy tab on the navigation menu.

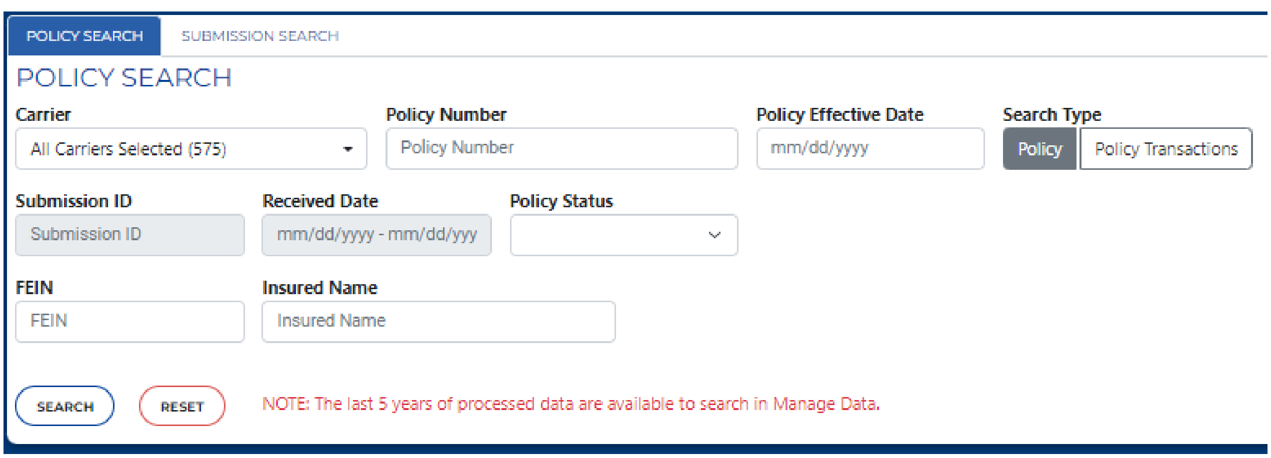


How to Search for A Policy Transaction

Conduct a general search for stored policy information and/or individual policy transactions in the Policy Tab on the Navigation Menu or via the Search Widget on the Dashboard.

From the Policy Tab, select Policy Search.

This leads to the Policy Search Screen. Input search criteria to locate the stored policy information and/or the individual policy transactions.



Toggle between Policy Search and Submission Search by using the tabs at the top of the box.

Policy Number: Input to search for a specific stored policy or policy transaction.

Policy Effective Date: Narrow the search by date with this option.

Search Type: THIS IS A REQUIRED FIELD. The system will default to Policy, which will search for all stored policies with that policy number. To search for all policy transactions, regardless of status, select Policy Transactions.

<u>Submission ID:</u> This is not a required field; enter this information if known.

<u>Received Date:</u> Narrow the search with this option.

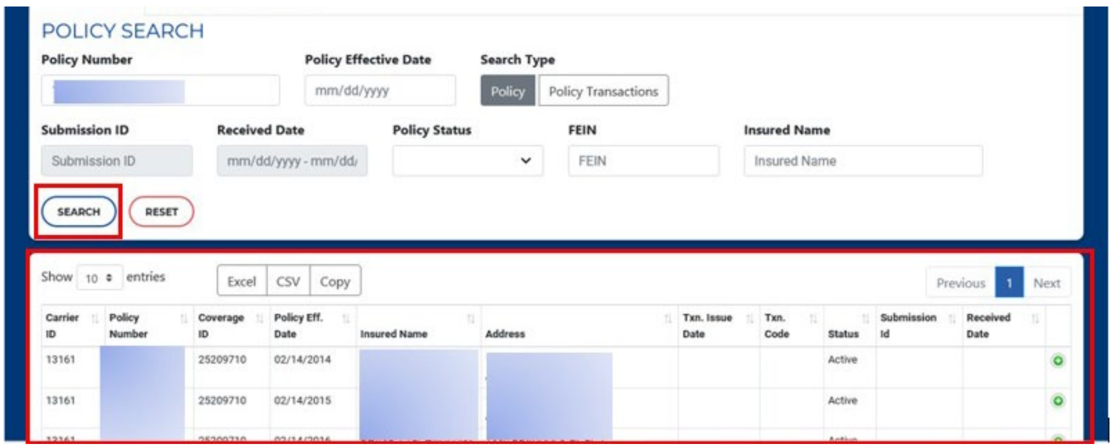
<u>Policy Status:</u> Use the drop-down menu to choose a policy status.

<u>FEIN:</u> Input the employer FEIN here.

<u>Insured Name:</u> Input the employer name here.

After adding search criteria, select the Search button to show the results.

<u>Policy Search Type</u>
In the policy results section is a list of stored policies that correspond to the search criteria.



The search shows a sortable grid with identifying policy information.

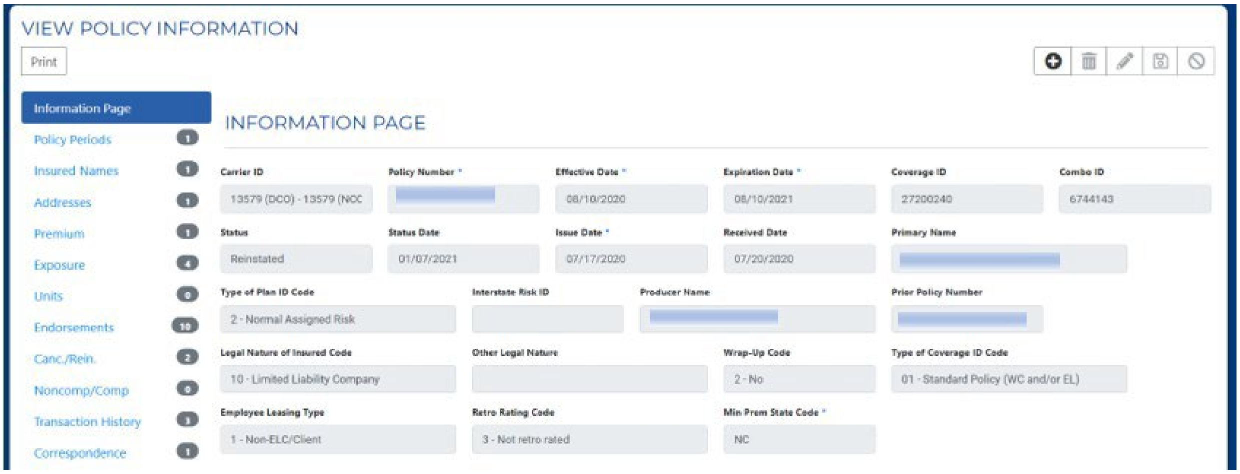
On the right of the grid, there are icons on each row  or  which adds or deletes the transaction from the My List Widget on the dashboard.

<u>*Note:</u> The Units tab on the left-hand side. This displays all associated units for this policy.

Export these transactions to Excel, CSV, or Copy to the clipboard.

Viewing a Policy

The policy number is hyperlinked. This hyperlink goes to the View Policy Information page for submitted and/or stored policy information.



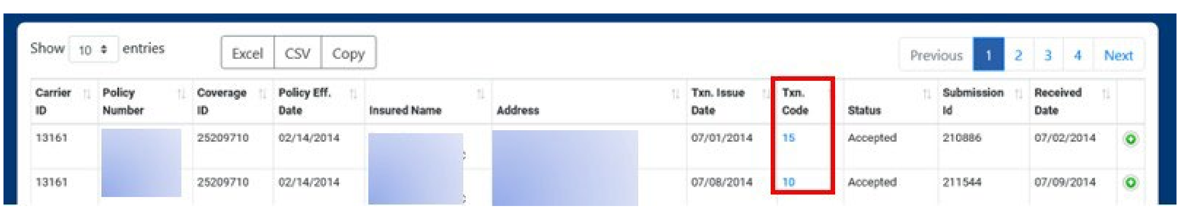
Most of the fields in the left hand menu are explained in How to Create a Policy Transaction. The notable difference is the additional field Policy Periods, which displays the Period Effective Date, Period Type, Governing Class, Experience Rating Code, Deposit Prem. Amount, Policy Est. Std. Prem. Total and Policy Min Prem. Amount. These are not editable fields when viewing the policy.

POLICY PERIODS

Period Effective Date	Period Type	Governing Class	Experience Rating Code	Deposit Prem. Amount	Policy Est. Std. Prem. Total	Policy Min Prem. Amount
07/01/2020	1 - 1 Year	8868	3 - Intrastate Rated Only	$0	$1,529,695	$900

Policy Transactions Search Type

When searching for policy transactions, the transaction code is hyperlinked. This leads to the View Transaction Information page associated with the policy transaction.

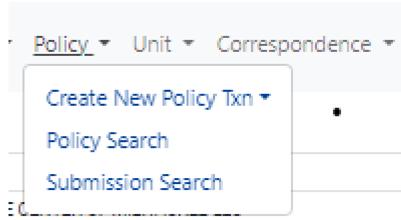


It is important to note, once policy information is submitted and stored, it cannot be changed. Create and submit a policy change transaction to change the stored policy data.

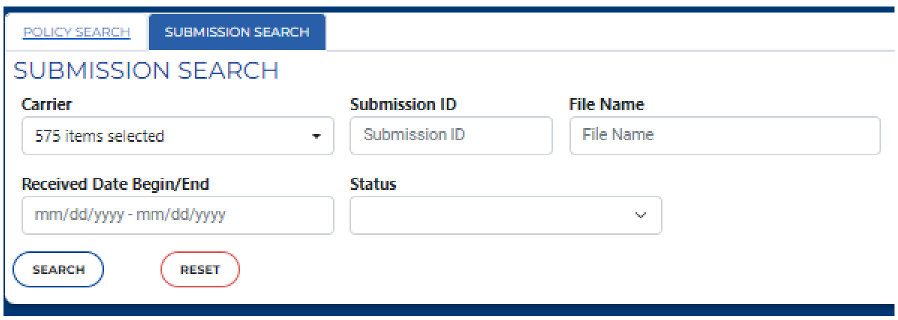
How to Search for a Policy Submission

Conduct a search for policies that were reported through the same submission. ***Note:** only direct reporters to the Wisconsin Compensation Rating Bureau will be able to use this search.

From the Policy Tab, select Submission Search.



This leads to the Submission Search Screen. Input search criteria to locate the specific policies from a specific submission.



Toggle between Policy Search and Submission Search using the tabs at the top of the box.

Submission ID: Input an exact submission ID to locate all policies that were submitted.

File Name: Search for a specific file name, if known.

Received Date: Input a From Date and To Date to locate all submissions for that specific time period. The Received Date range must be 30 days or less.

Status: Select from a dropdown –

- **Processed:** The policy is stored on the WCRBs database
- **Rejected:** The transaction has not been stored and has been rejected. The reject reason can be viewed on the Submission Rejection Report
- **Unmatched:** Transaction(s) in a submission require manual action by the WCRB

After adding the search criteria, select the Search button to show a list of all policies that users have reported.

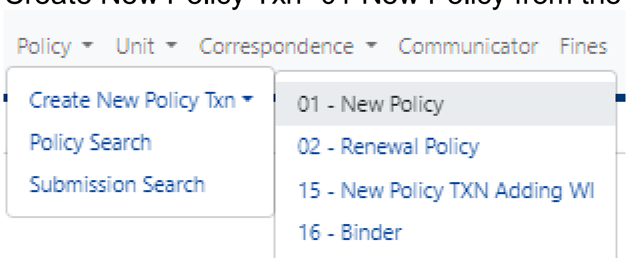
How to Create a Policy Transaction

A user with specific permissions (Data Submitter) can create a new policy transaction. Create a New Policy Transaction or create a Policy Change Transaction.

If additional information is needed to determine whether to create a New or Policy Change Transaction, contact the Wisconsin Compensation Rating Bureau directly at (262) 796-4540 or manage.policy@wcrb.org

Transaction Code	Transaction Type
01	New Policy
02	Renewal Policy
15	New Policy TXN Adding WI
16	Binder

To create a New Policy Transaction, navigate to the Policy Tab on the Navigation Menu and select Create New Policy Txn- 01 New Policy from the drop down.



The system navigates to the Create New Policy Transaction page. Add all the policy information for the transaction. Fields with a gray background are not editable and fields with a blue asterisk * are required. To the left of the screen is navigation menu that details each section of the policy transaction that needs to be completed.

***Note:** These fields were designed to be entered in order. Skipping ahead to other sections will bring up error messages requiring previous information fields to be entered first.

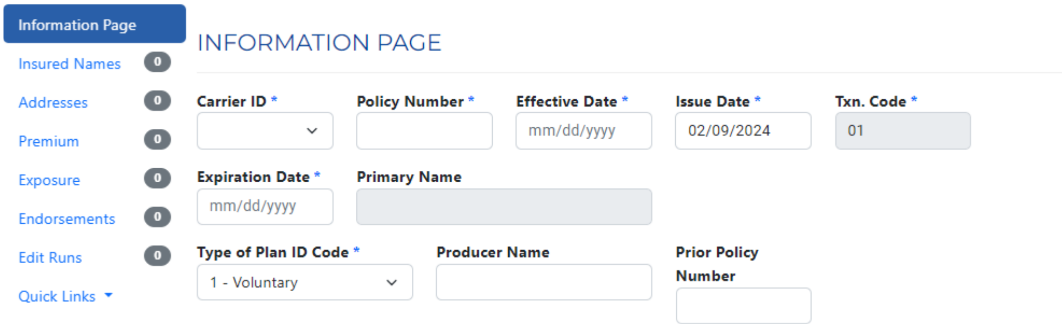
The following examples include simulated test data.

Information page

The first section is the information page that contains:

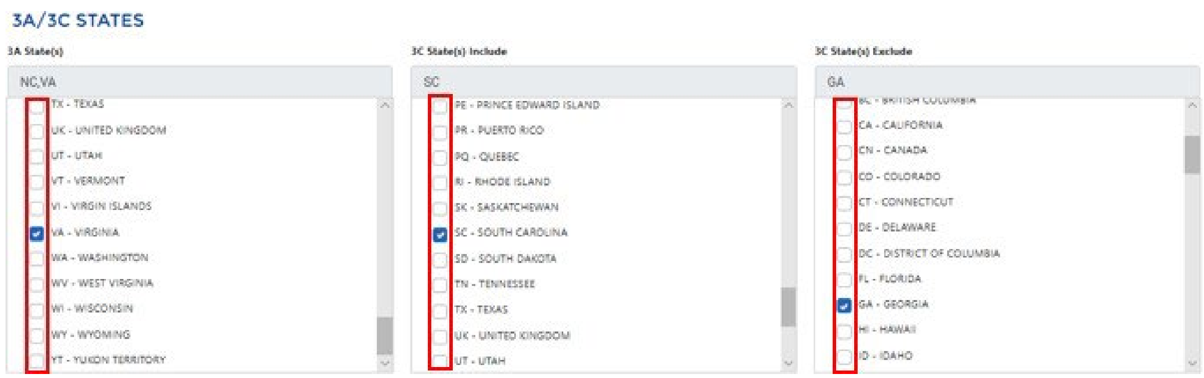
- Carrier ID
- Policy Number
- Effective Date
- Txn. Code
- Issue Date
- Expiration Date
- Primary Name
- Type of Plan ID Code
- Producer Name
- Prior Policy Number
- Legal Nature of Insured Code
- Other Legal Nature
- Wrap-Up Code
- Type of Coverage ID Code
- Policy Term Code
- Experience Rating Code
- Employee Leasing Type
- Retro Rating Code

All grayed fields are not editable, and all blue asterisks indicate a required field.



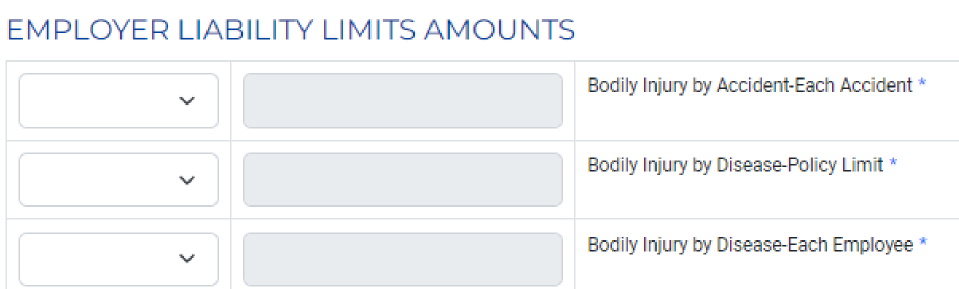
3A/3C States

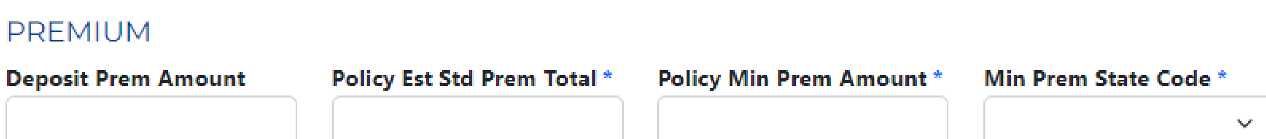
Add 3A-3C States to the policy transaction by selecting the corresponding box to the left.



Employer Liability Limits Amounts

Input the necessary information in the employer liability limits and premium fields





Premium

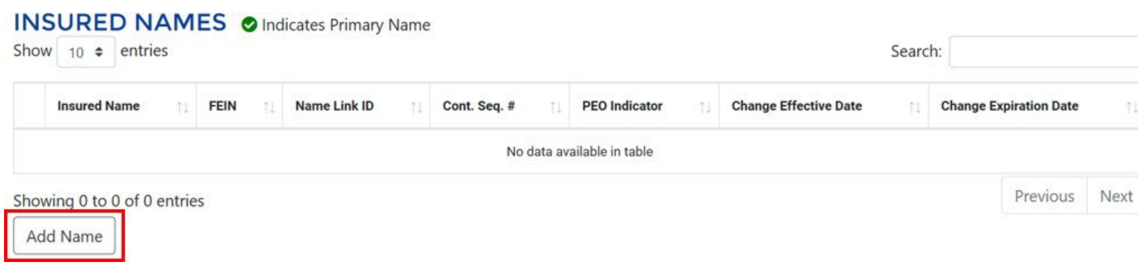
Policy Est Std Prem Total, Policy Min Prem Amount, and Min Prem State Code are required fields.

Change Effective/Expiration Dates

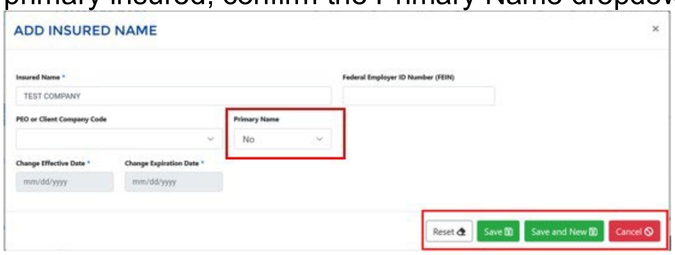
These fields are not editable in New Policy transactions.

Insured Names

Input all names for the insured in a sortable grid. Add a primary name and correct Name Link ID. Reference the WCIO specs for details. To add a name, select the Add Name button at the lower left of the section.



A pop-up box will display to add the insured name. Once all fields have been added, select from the following: Reset, Save, Save and Add New, and Cancel. When the Insured Name being added is the primary insured, confirm the Primary Name dropdown selection is Yes.



After selecting Save, the name appears in the grid. To edit or delete an insured name, use the Edit and Delete buttons on the left-hand side of the grid.

Note: There is no blue asterisk* indicating the FEIN is a required field, but if it is left blank it will pop up in the validation errors.

Addresses

This section allows input of all addresses for the insured in the same sortable grid as the insured name section. Click the Add Address button.

ADDRESSES

Show 10 entries Search:

	Address	Name Link	Foreign Address	Country	Area	Type	Change Effective Date	Change Expiration Date
Edit Delete	123 MAIN STREET RALEIGH, NC 27616	TEST COMPANY	N			1 - Mailing		

Showing 1 to 1 of 1 entries

Previous 1 Next

Add Address

A pop-up box will display to add the address.

ADD ADDRESS

Type of Address Code *

Address Structure: 1 - Structured Address

Foreign Address Code: No

Name Link *

Street Address *

City *

State Code *

Zip Code *

Wrap-up Project Name/Location *

Geographic Area *

Country Code *

Change Effective Date *: mm/dd/yyyy

Change Expiration Date *: mm/dd/yyyy

Reset | Save | Save and New | Cancel

Premium

Input all premium information for the insured in a sortable grid. To add premium information, follow similar steps as outlined above for adding an insured name.

PREMIUM *

Show 10 entries Search:

DCO Risk ID	Est. State Std. Prem.	Exp. Mod. Status	Exp. Mod. Factor	Experience Mod. Effective Date	Expense Constant State	Expense Constant	Premium Discount	Other Indv. Risk Rating	Insurer Prem. Deviation	Type of Prem. Deviation Code	Premium Adjustment Period Code	State Added Reason	Change Effective Date	Change Expiration Date
No data available in table														

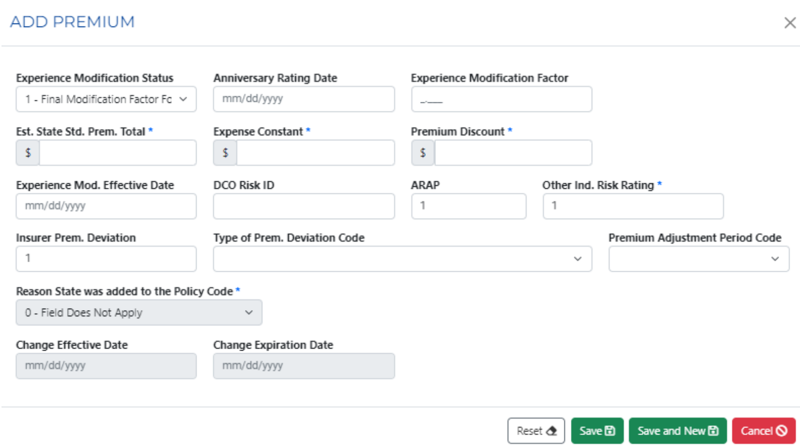
Showing 0 to 0 of 0 entries

Previous Next

Add Premium

Click the Add Premium button.

A pop-up box allows the user to add the premium.



Find definitions of input fields in the Wisconsin Workers Compensation Statistical Plan Manual.

Exposure

Input all exposure information for the insured in a sortable grid.

EXPOSURE

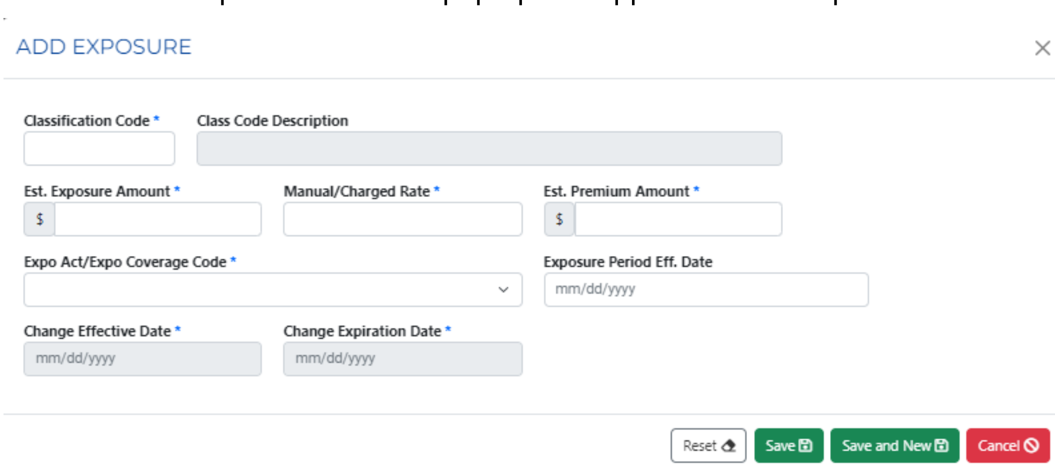
Show 10 entries | Search:

	Class Code	Phraseology	Est. Exposure Amount	Manual Rate	Est. Prem. Amount	Expo. Period Eff. Date	Expo. Act	Effective Date	Expiration Date
Edit Delete	8810	CLERICAL OFFICE EMPLOYEES NOC	$1,000.00	0.2300	$1,000		00		

Showing 1 to 1 of 1 entries | Previous 1 Next

Add Exposure

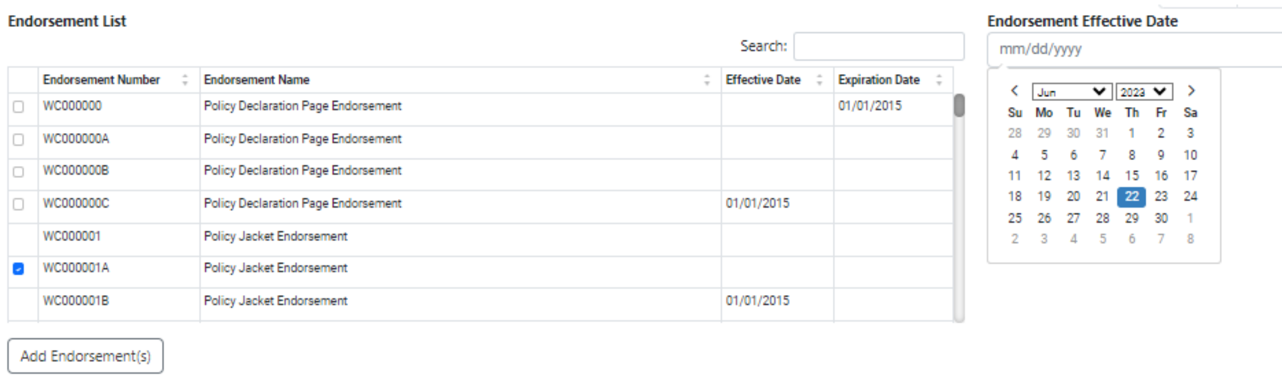
Click the Add Exposure button. A pop-up box appears to add exposure information.



Endorsements

Add endorsements to the policy transaction. Use the list of endorsements located at the bottom of the page and add them by checking the corresponding box to the left.

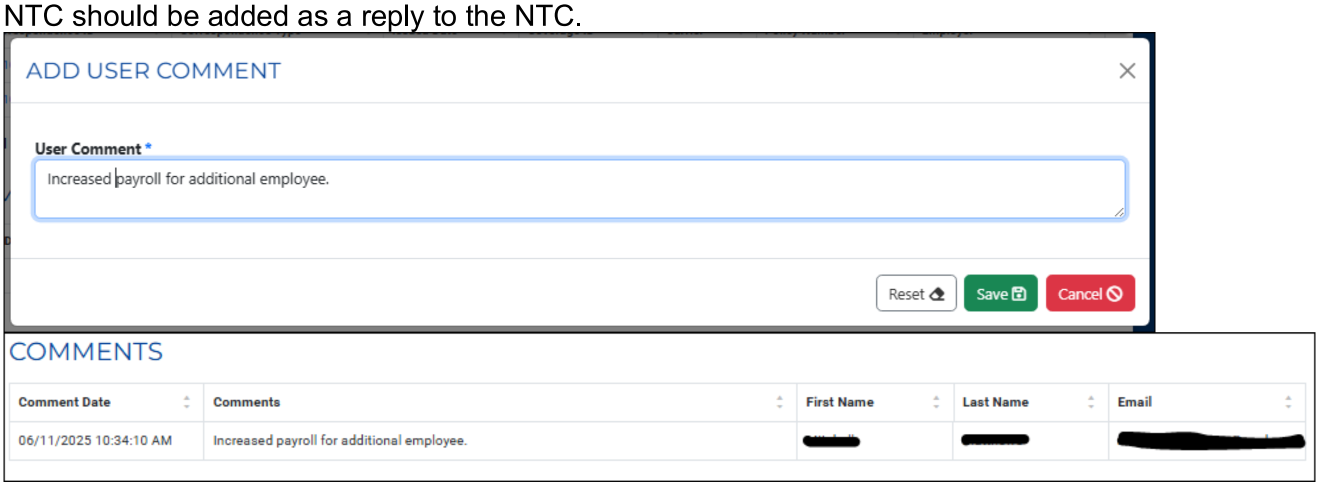
Once the endorsements have been selected, indicate the effective date to the right of the screen.
***Note:** If the endorsements have different effective dates they will need to be added separately.



Once all endorsement effective dates and applicable endorsements are indicated, select the Add Endorsement button. If any of the selected endorsements require detailed information, the system will display a blank endorsement data entry field for each endorsement. Enter the necessary information and continue with the Save or Close buttons.

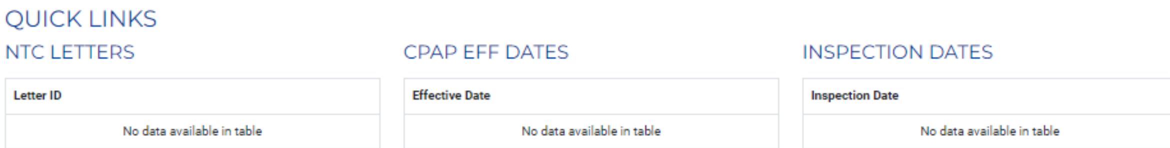
Comments

Add any internal notes regarding the policy to this section. Please note that although WCRB reviews posted comments, the comment section should not be used to respond to open NTCs. Responses to NTC should be added as a reply to the NTC.



Edit Runs
Indicator of how many times the edit has run.

Quick Links:
Only the last 5 years of data are included in Quick Links.



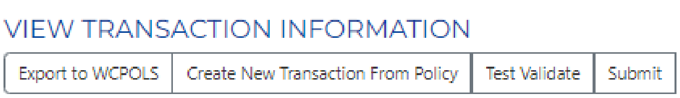
Saving
When all fields have been entered for the transaction, scroll to the top of the screen to select the Save  , Cancel  , or Print.

To save, select the Save button at the top right of the screen. A pop-up box appears as confirmation. ***Note:** Saving the transaction does not submit the transaction to the Wisconsin Compensation Rating Bureau, it saves the policy transaction in Manage Data.

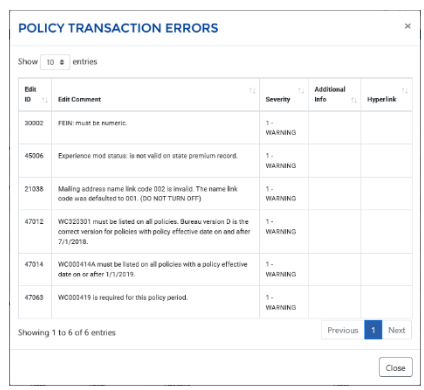
Validating

After saving, users with edit permissions have the option to test validate the transaction prior to submitting it to the Wisconsin Compensation Rating Bureau. ***Note:** transactions that are test validated are not submitted. The transaction will still need to be submitted to us after validations are run.

To validate the transaction prior to submitting, select the Test Validate button at the top left corner of the saved policy transaction.



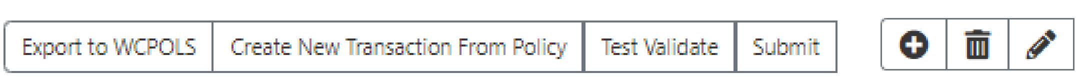
The WCRB highly recommends using the Test Validate to confirm the transaction is correct prior to submission.



In Test Validate, the system will run the same validations that are used for our policy errors and rejections process. A dialog box will display any edit IDs and comments found in the validation process. If any of the edits are rejected, the transaction will not be accepted to the database and the errors should be resolved before submitting the transaction. Close the dialog box to return to the saved and **unsubmitted** transaction.

Submitting

There are buttons along the top of the screen:



Export to WCPOLS: Transfer this policy transaction into the WC format.

Create New Transaction From Policy: Duplicate policy information added and make changes.

Test Validate: Run the validation. It is recommended to run again if anything was modified after the first validation. ***Note:** if the validation fails, it is important to make changes to the current policy transaction and **DO NOT** create another transaction to fix the issue, as it will generate a duplicate policy transaction and cause an error. To correct the current policy transaction, click the pencil icon at the top right and change the information on the transaction.

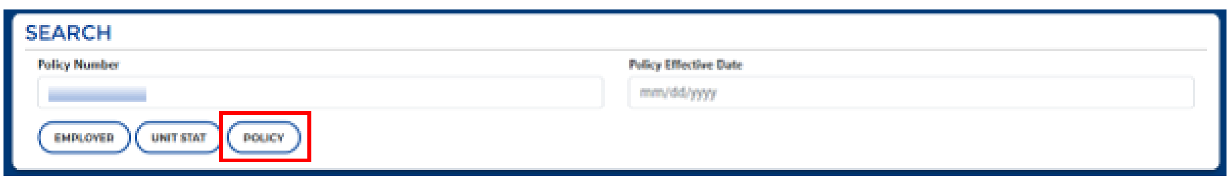
Submit: This submits the full policy transaction to the Wisconsin Compensation Rating Bureau. The system acknowledges that the transaction was submitted by listing the status of the transaction. Acknowledge the message by selecting OK, or OK and add to WCPOLS Queue to add the transaction to the WCPOLS Queue located on the dashboard.

Icons:
The (+) icon adds the policy transaction to the My List Widget. The Trash Can icon deletes the policy transaction completely. The Pencil icon modifies the policy transaction data.

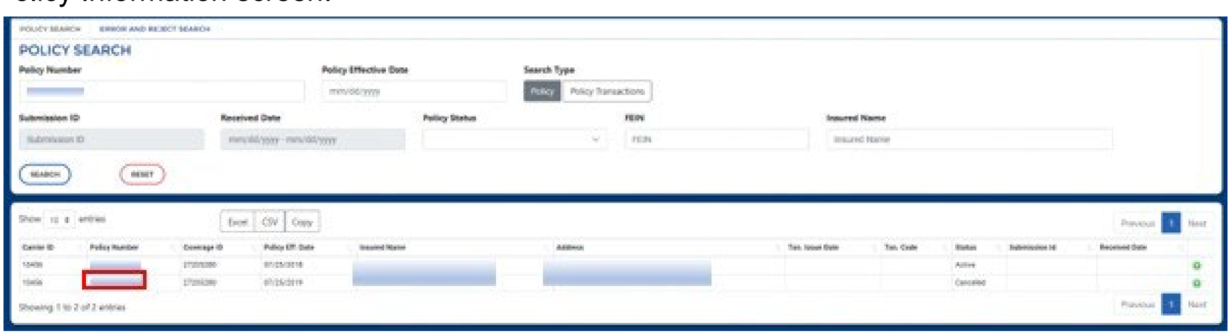
How to Create a Policy Change Transaction

To create a Policy Change Transaction, first locate the shell of the Policy.

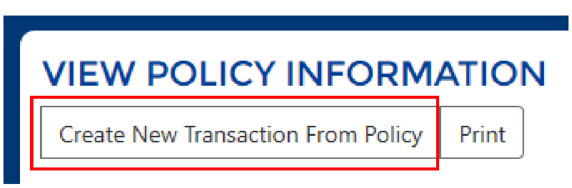
Navigate to the Dashboard and input the policy number in the Search Widget and select the Policy button.



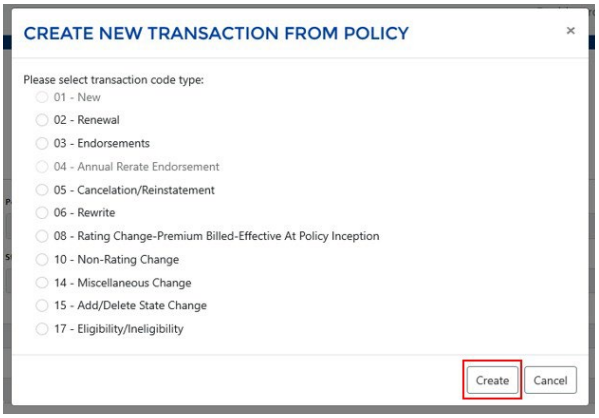
View all policies in the search results. Click the hyperlinked policy number to go to the View Policy Information screen.



The View Policy Information screen will show the saved and submitted policy. Select the Create New Transaction from the top left of the screen.



A dialog box will display the available transaction types. After selecting the intended transaction code type, hit the Create button.



The policy transaction will display a copy of the stored policy information with the ability to edit any open fields.

Deleting Endorsements

When deleting endorsements, please note the deleted endorsements will continue to be visible in Manage Data but will be greyed out. The Effective and Expirations Dates fields will also display the same date.

ENDORSEMENTS

Show 10 entries

Search:

Detail	Endorsement Number	Endorsement Name	Effective Date	Expiration Date	Received Date
	WC480606B	WI Cancellation and Nonrenewal Endorsement	05/17/2024	05/17/2025	05/21/2024
Details	WC000424	Audit Noncompliance Charge Endorsement	05/17/2024	05/17/2024	05/21/2024
	WC000425	Experience Rating Modification Factor Revision Endorsement	05/17/2024	05/17/2024	05/21/2024

Unit Tab or USR (Unit Statistical Report)

Create a new Unit Statistical Report, search for submitted and unsubmitted reports, search for claims and search for submissions, from the Unit Tab on the navigation menu.

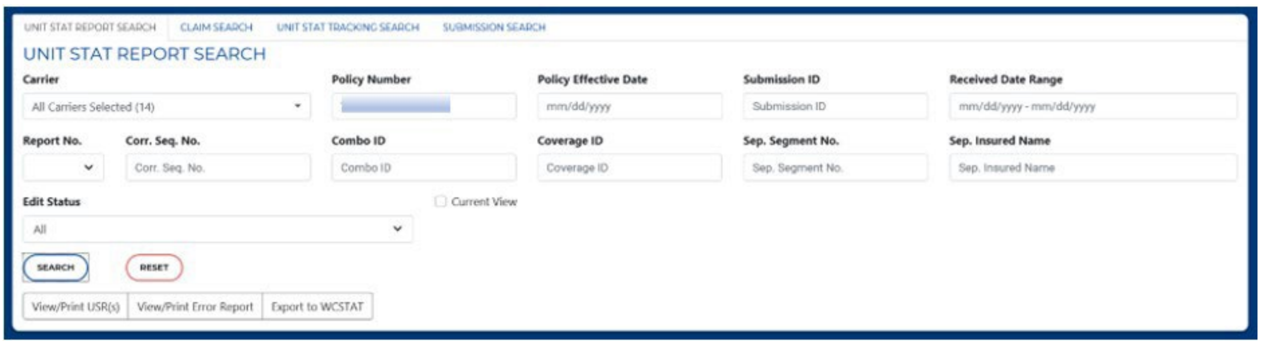
Below are steps to common procedures as it relates to unit statistical reports.

How to Search for a Submitted Unit Statistical Report

Search for unit statistical reports via the Search Widget on the Dashboard, or from the Unit Tab on the Navigation Menu.

From the Unit Tab, select Unit Stat Report Search.

On the Unit Stat Report Search screen, input search criteria to locate the unit statistical report.



Toggle between Claim Search, Unit Stat Tracking Search and Submission Search using the tabs along the top of the search box.

Carrier: This field allows the carrier to search all companies they are associated with, a specific company, or a mix of companies. The system will automatically default to all carriers. To select a specific company, click the drop-down menu and then click Deselect All button. Then select the company or companies to search.

Policy Number: THIS IS A REQUIRED FIELD. To find a specific stored policy, or policy transaction, input that here.

Policy Effective Date: Narrow the search with this option.

Submission ID: If multiple unit statistical reports were submitted in a single submission, the Submission ID criteria can locate all the units.

Received Date Range: Narrow the search by adding a received date range. Manually enter the date range or select a pre-fillable date range.

Report No.: Use the drop-down menu to select a specific report number for the correlating policy number.

Corr. Seq. No.: Add the correction sequence number if appropriate.

Combo ID: Add the Combo ID for the employer here. Find the Combo ID in the Employer Chronicle.

Coverage ID: Add the Coverage ID for the employer here. Find the Coverage ID in the Employer Chronicle.

Sep. Segment No.: This is used as an indicator to help identify a unit as separated data.

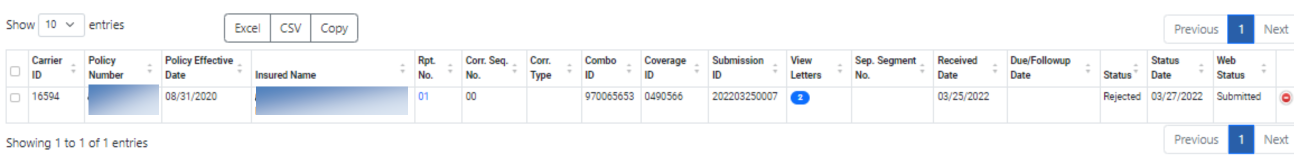
Sep. Insured Name: Add the separated entity name here to help locate the specific unit statistical report.

Status: Use the drop-down to locate a specific unit statistical report based off the report's status.

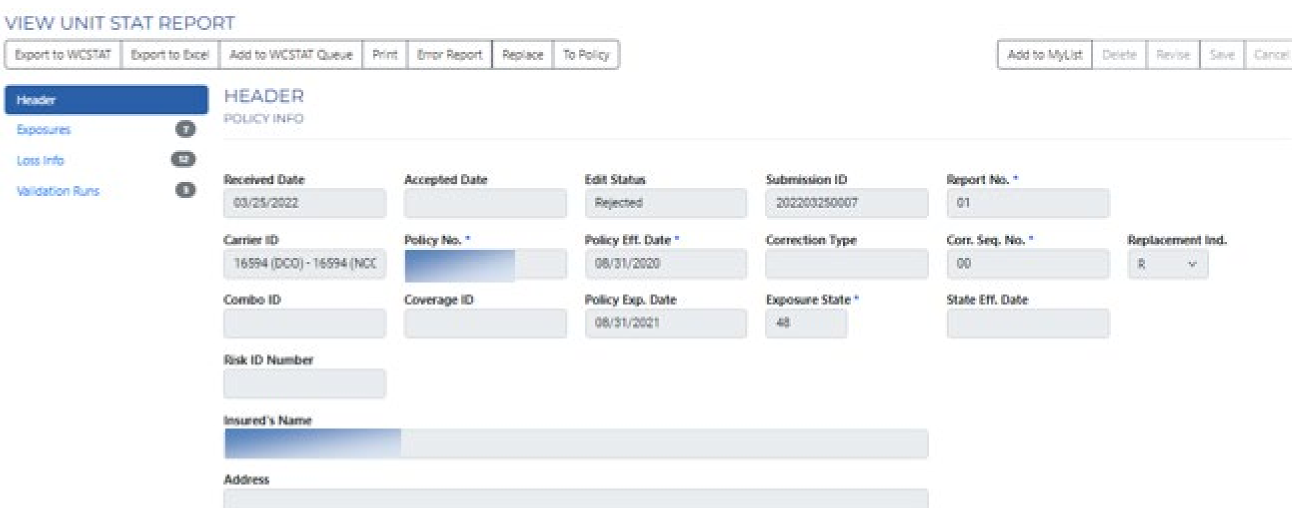
Current View: This view displays the current overall view of units. If checked, Submission ID, Received Date Range, and Status fields lock and become grayed out from options. If subsequent reports have been corrected, the newest data is viewable.

After the search criteria is added, select the Search button to show the results.

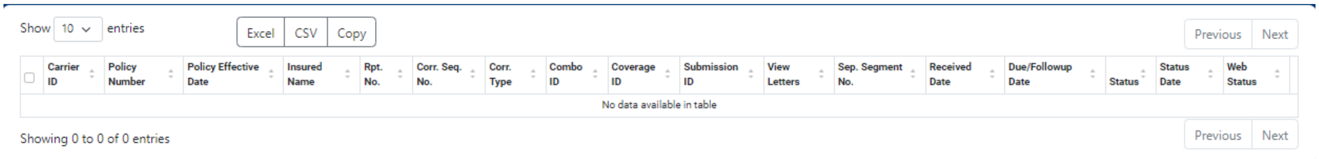
In the unit stat results section is a list of unsubmitted unit statistical reports that correspond to the search criteria.



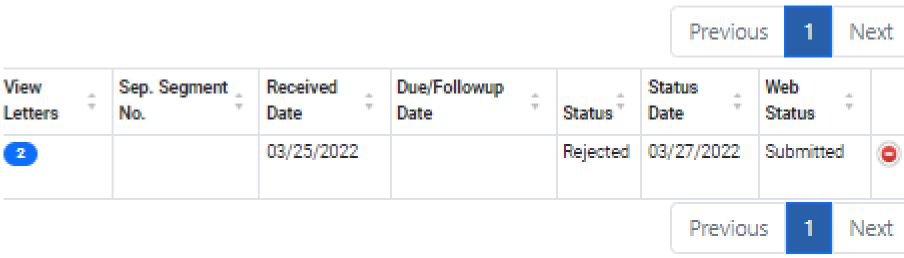
The search results will be displayed in a sortable grid with identifying policy and unit statistical report information. The report number is hyperlinked. This hyperlink goes to the individual saved unit statistical report. The policy number is also hyperlinked and leads to the View Policy Information page for the stored policy information.



***Note:** a feature on the View Unit Stat Report screen is the To Policy button at the top of the screen. This navigates to the stored policy for this unit.

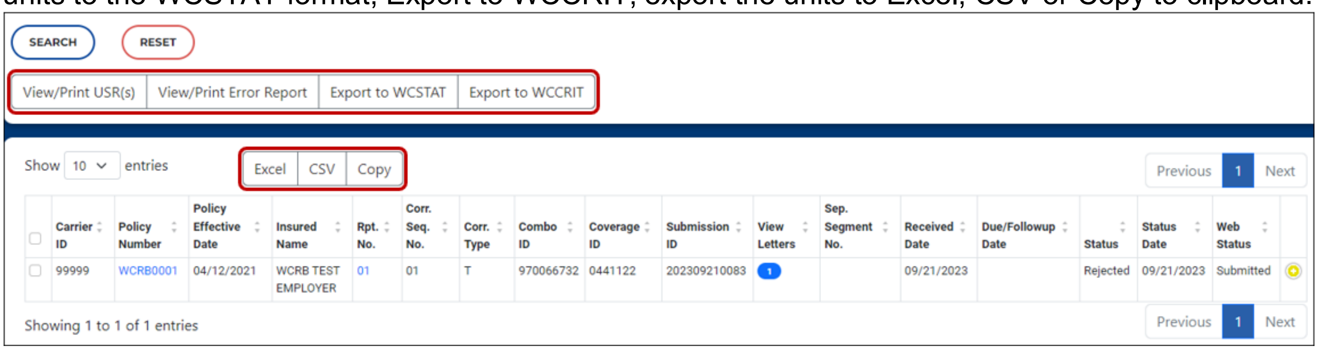


Located toward the right side of the results grid is a column for Status. All unit stat reports for the policy and the status of each report are located there.



On the right side of the grid there are icons on each row or which allow adding or deleting the transaction from the My List Widget on the dashboard.

The search results screen has the option to View/Print USR(s), View/Print Error Report, Export the units to the WCSTAT format, Export to WCCRIT, export the units to Excel, CSV or Copy to clipboard.

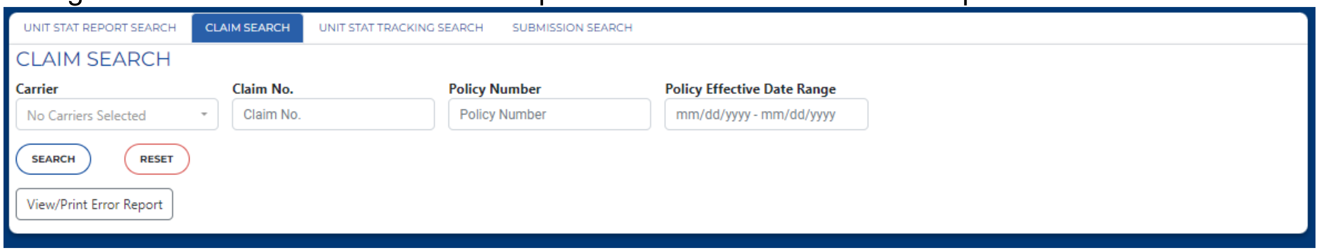


How to Search for a Claim

Conduct a claim search for a unit that has been submitted to the Wisconsin Compensation Rating Bureau.

From the Unit Tab, select Claim Search.

This goes to the Claim Search Screen. Input search criteria to locate the specific claim information.



Toggle between Unit Stat Report Search, Unit Stat Tracking Search and Submission Search using the tabs along the top of the search box.

Carrier: Select a carrier to narrow the search.

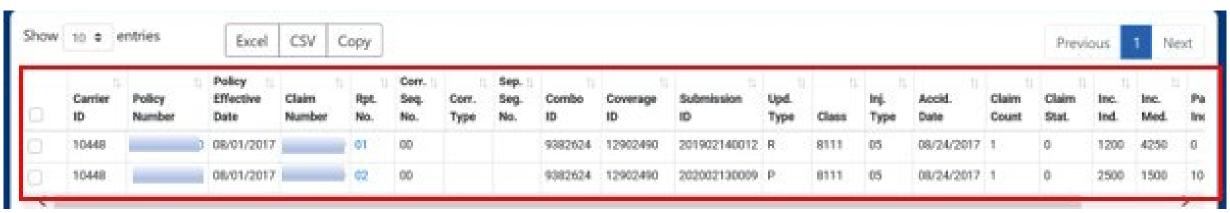
Claim No.: Input the specific claim number.

Policy Number: Narrow the search with this option.

Policy Effective Date Range: Use the drop-down menu to select the specific date range.

After adding the search criteria, select the Search button to show the results.

The results section has a list of all submitted unit statistical reports that contain a specific claim.



Show 10 entries | Excel | CSV | Copy | Previous | 1 | Next

Carrier ID	Policy Number	Policy Effective Date	Claim Number	Rpt. No.	Corr. Seq. No.	Corr. Type	Sep. Seg. No.	Combo ID	Coverage ID	Submission ID	Upd. Type	Class	Inj. Type	Accid. Date	Claim Count	Claim Stat.	Inc. Ind.	Inc. Med.	Pa Inc
10448		08/01/2017		01	00			9382624	12902490	201902140012	R	8111	05	08/24/2017	1	0	1200	4250	0
10448		08/01/2017		02	00			9382624	12902490	202002130009	P	8111	05	08/24/2017	1	0	2500	1500	10

Results display in a sortable grid with identifying policy and unit statistical report information. The policy number is hyperlinked and leads to the View Policy Information page for the stored policy information. The report number hyperlink leads to the individual stored unit statistical report.

Scrolling right, the system displays all claim information that was submitted with the unit.

Policy Number	Policy Effective Date	Claim Number	Rpt. No.	Corr. Seq. No.	Corr. Type	Sep. Seg. No.	Combo ID	Coverage ID	Submission ID	Upd. Type	Class	Inj. Type	Accid. Date	Claim Count	Claim Stat.	Inc. Ind.	Inc. Med.	Paid Ind.	Paid Med.
	08/01/2017		01	00			9382624	12902490	20190214001	R	8111	05	08/24/2017	1	0	1200	4250	0	926
	08/01/2017		02	00			9382624	12902490	20200213000	P	8111	05	08/24/2017	1	0	2500	1500	1000	926

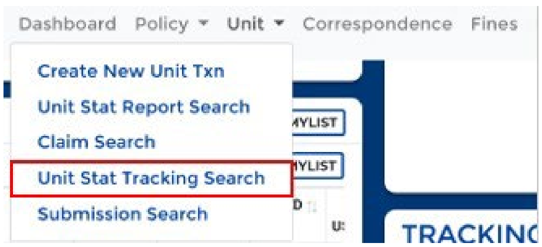
On the right of the grid there are icons on each row  or  which add or delete the transaction from the My List Widget on the dashboard.

Export the units to Excel, CSV or Copy to the clipboard. The View/Print Error Report button is below the Search button.

How to Search in Unit Statistical Report Tracking

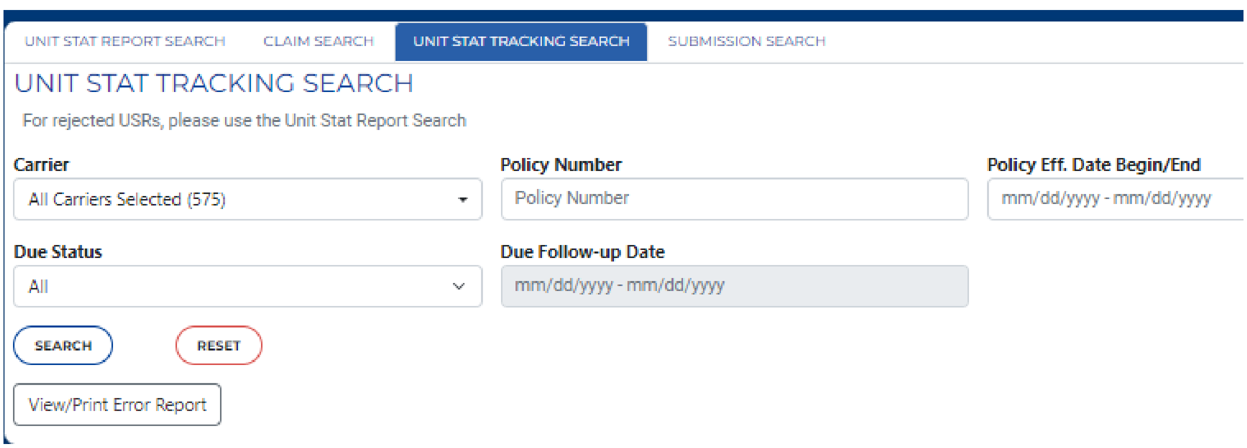
Conduct a Unit Statistical Tracking Search for units that have been rejected or not yet submitted to the Wisconsin Compensation Rating Bureau.

Search for unsubmitted unit statistical reports via the Search Widget on the Dashboard, the Tracking by Category Widget on the Dashboard, or from Unit Tab on the Navigation Menu. From the Unit Tab, select Unit Stat Tracking Search.



On the Unit Stat Tracking Search Screen, input search criteria to locate the unsubmitted or rejected unit statistical reports.

Narrow the search for Due Status of Pre-Delinquent or Expected to all unit statistical reports that are not submitted and **have potential to produce a fine.**



Toggle between Claim Search, Unit Stat Report Search and Submission Search using the tabs along the top of the search box.

Carrier: This field allows the carrier to search all companies they are associated with, a specific company, or a mix of companies. The system will automatically default to All Carriers. To specify a company, click the drop-down menu, and then click Deselect All button. From there select the company or companies to search.
Policy Number: Input information here or in the field of Due Status to generate results.

Policy Eff. Date Begin/End: Enter a date range here.

Due Status: Narrow the search with this option.

All: Show all unsubmitted unit statistical reports for this policy number, regardless of status.

Filing Due Date Custom Search: Use a custom date range.

Pre-Delinquent: Show all unsubmitted unit statistical reports that are approaching their due date.

Expected: This will show all unsubmitted unit statistical reports that are currently due.

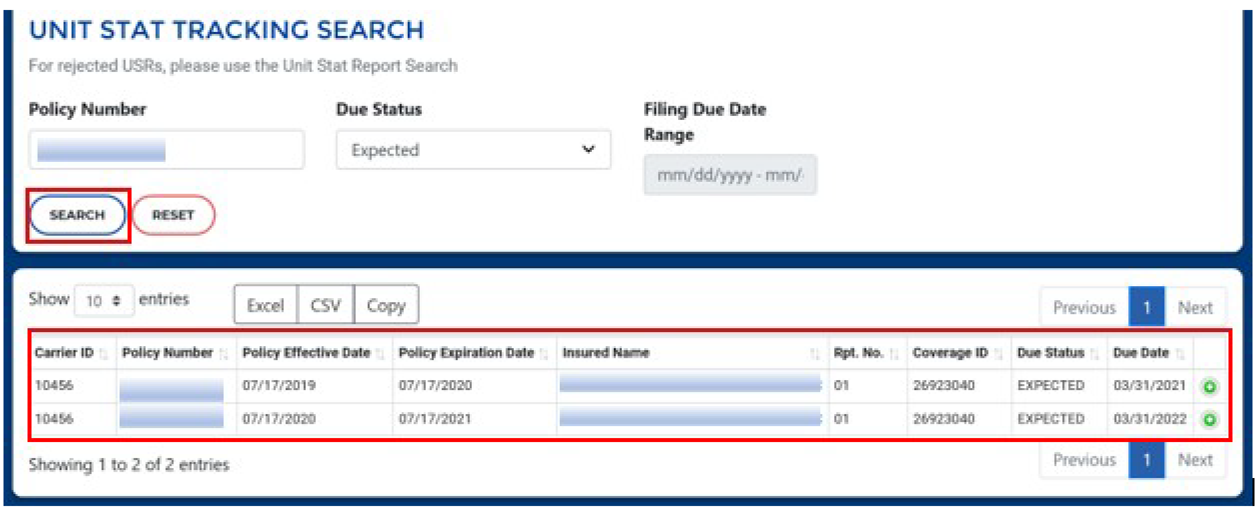
Delinquent: Show all unsubmitted unit statistical reports that are due and are **accumulating fines.**

Rejected: Show all unit statistical reports that are currently in a rejected status and require carrier action or response. These can be **subject to fining.**

Due Follow-up Date Range: Narrow the search by adding a date range. Manually enter the date range or select a pre-fillable date range. This field is grayed out unless Due Status has "Filing Due Date Custom Search" selected.

After adding the search criteria, select the search button to show the results.

The unit stat results section has a list of unsubmitted or rejected unit statistical reports that correspond to the search criteria.



The search will show a sortable grid with identifying policy information. The policy number is hyperlinked. This hyperlink leads to the View Policy Information page for the stored policy information. The insured name is hyperlinked. This hyperlink goes to the Employer Chronicle.

Located on the right-hand side of the grid is a column for Due Status. All unsubmitted and rejected unit stat reports for that policy and the status of that report should be listed.

On the right of the grid there are icons on each row or which add or delete the transaction from the My List Widget on the dashboard. This is one way to manage a personal work queue by adding items that require attention and removing them once completed.

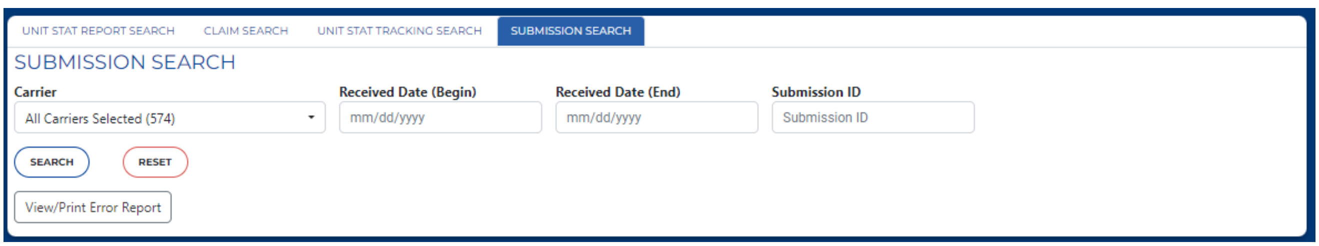
Export these transactions to Excel, CSV or Copy to the clipboard using the buttons.

How to Search for a Submission

Conduct a search for all units that were reported through the same submission. ***Note:** only direct reporters to the Wisconsin Compensation Rating Bureau will be able to use this search. Carriers that report USR through NCCI will not need access to this.

From the Unit Tab, select Submission Search.

On the Submission Search Screen, input search criteria to locate the specific unit statistical reports from a specific submission.



Toggle between Claim Search, Unit Stat Tracking Search and Unit Stat Report Search using the tabs along the top of the search box.

Carrier: Select a carrier to narrow the search.

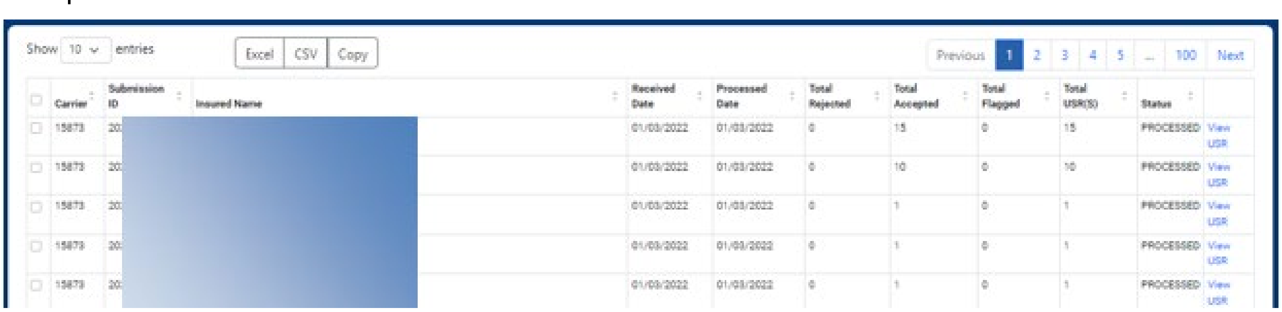
Received Date: Input a From Date and To Date to locate all submissions for a specific time period.

Submission ID: Input an exact submission ID to locate all units that were submitted.

After the search criteria is added, select the Search button to show the results.

The results show a list of all submitted unit statistical reports that a specific claim has reported.

If only a date range was used as search criteria, the results will display all submissions during that time period.



How to Create a New Unit Statistical Report

Users with specific permissions can create a new unit statistical report from scratch. Only direct reporting carriers to the Wisconsin Compensation Rating Bureau are allowed to submit the created unit statistical reports via the Manage Data web application. The Wisconsin Compensation Rating Bureau must already have a submitted policy in order for the unit statistical report to be processed.

Depending on whether this is the first report for the policy, or a subsequent report, either create a new unit statistical report or a subsequent unit statistical report.

If additional information is needed to determine whether to create a new, subsequent, or correction report, contact the Wisconsin Compensation Rating Bureau directly at (262) 796-4540 or exr-usr@wcrb.org

To create a new unit statistical report, go to the Unit tab on the navigation menu and select Create New Unit Txn.

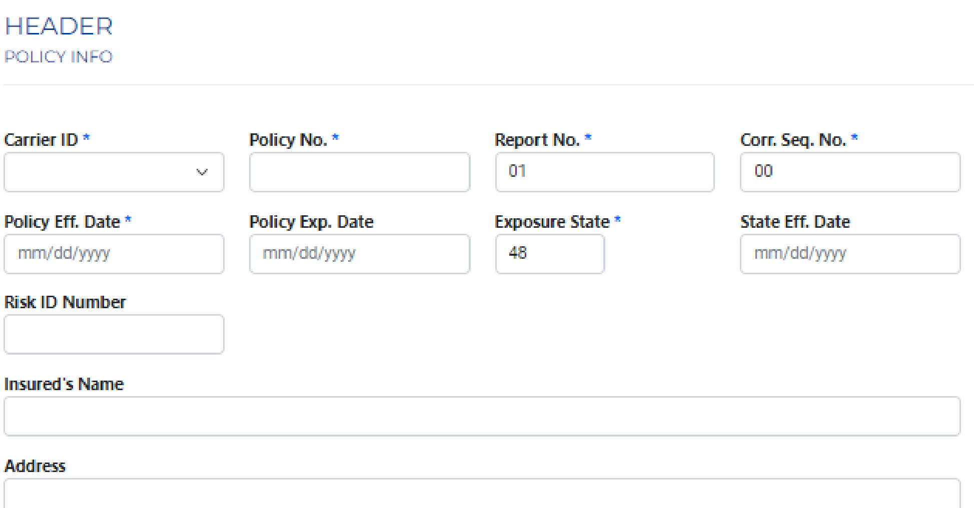
The system will load the Create New Unit Transaction screen. Add all the unit statistical report data for the policy.

***Note**: To the left of the screen is a navigation menu of each section that needs to be completed.

Header Record

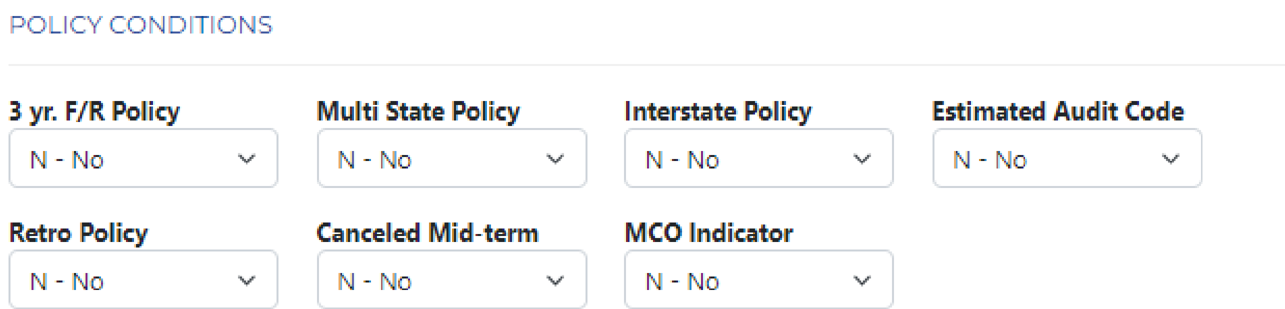
Policy Info

The first section is the header record. As previously mentioned, blue asterisks indicate a required field. There may be some pre-filled fields, edit if necessary.



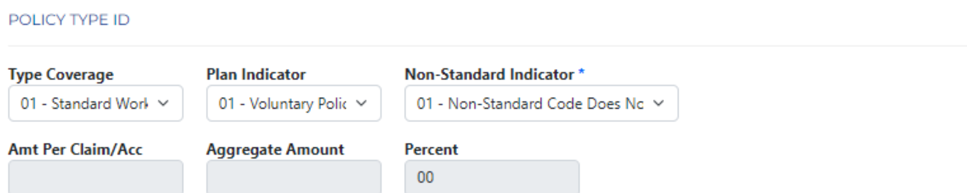
Policy Conditions

Place a check mark on any of the following policy conditions. The default selection is “No” for not selected.



Policy Type ID

Use the drop-down menus to further identify policy information.

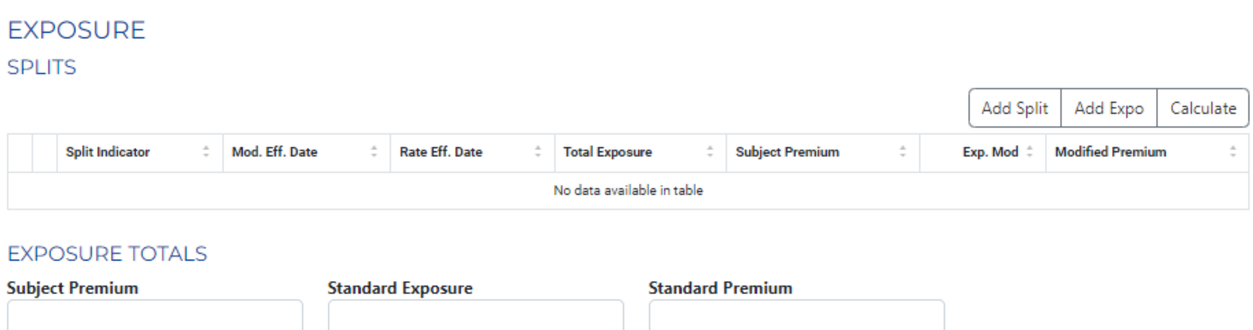


Previous Fields

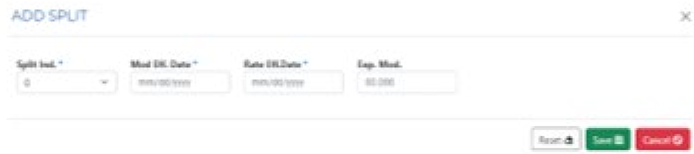
Add the policy information that was previously added in the policy info section.

<u>Exposure Record:</u>

Exposure Splits

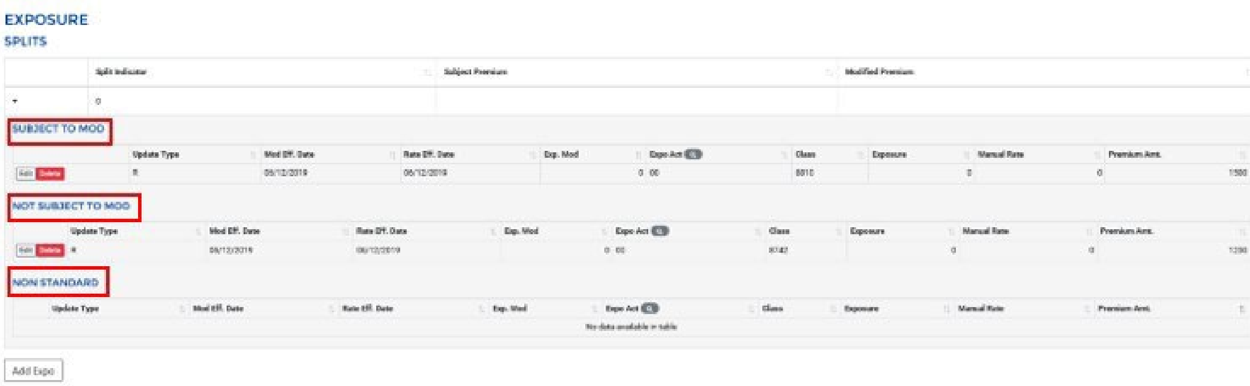


Enter an exposure or exposure split to the unit statistical report. To add an exposure, click the Add Expo button at the top right of the section. To add a split, click the Add Split button. Once exposures and splits have been added, click the Calculate button to calculate the exposure totals. The totals can also be manually inputted.



A pop-up box displays to add the split and a pop-up box displays to add the exposure. Once all fields have been added, Reset, Save, or Cancel using the buttons. ***Note**: the first exposure added will have the Split Indicator pre-populate to '0'. Adding multiple exposures causes the split indicator to go in consecutive order 0,1,2 etc. Split indicator must be completed in consecutive order, or an error will occur.

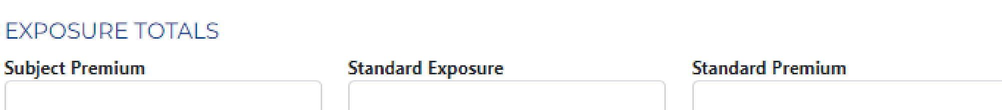
After selecting Save, the exposure appears in the grid. There are different subsections on the exposure splits. Depending on what class category selected when adding the exposure, the system will add to the subsection of Subject to Mod, Not Subject to Mod, and Non-Standard.



To edit or delete an exposure, use the Edit and Delete buttons on the left-hand side of the grid.

Exposure Totals

Tally up all exposures for the insured and place them in the corresponding fields. There is also the option to use the Calculate Button in the Splits Section. ***Note:** <u>this is not a required section.</u> Ensure values are entered correctly to prevent additional follow-up.



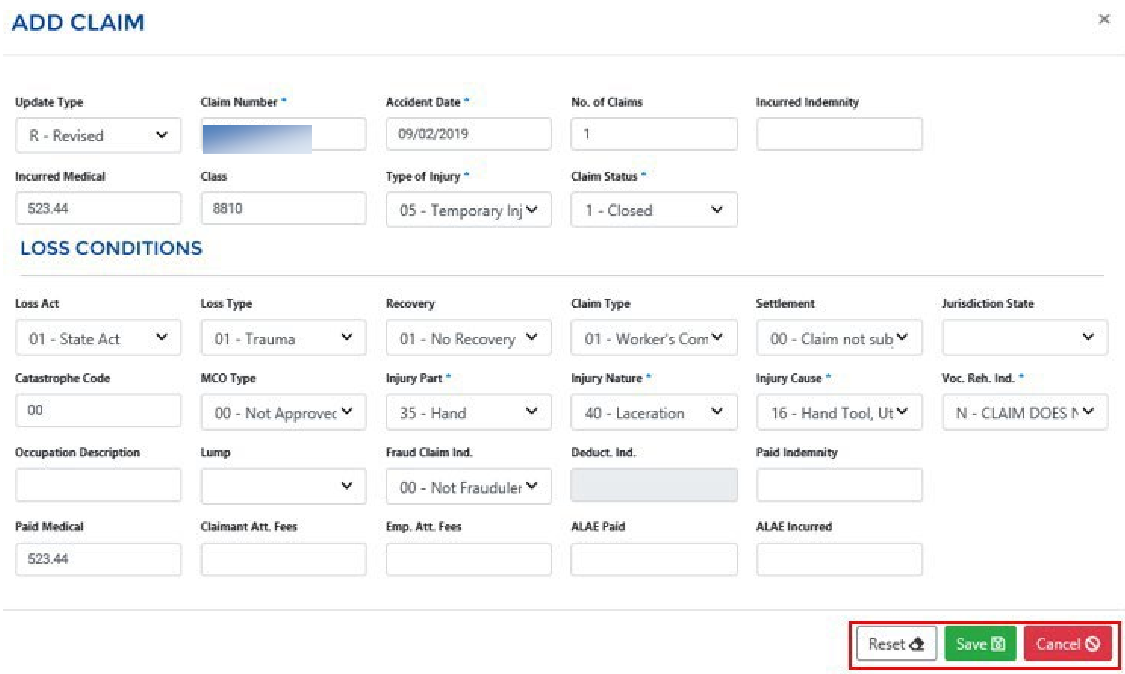
If there are no losses to report, save the unit.

Loss Info Record:

Loss Info

Add all losses applicable to the unit statistical report. To add a loss, click the Add Claim button at the bottom of the section.

A pop-up box displays to add the claim information. Input data and Reset, Save, or Cancel.

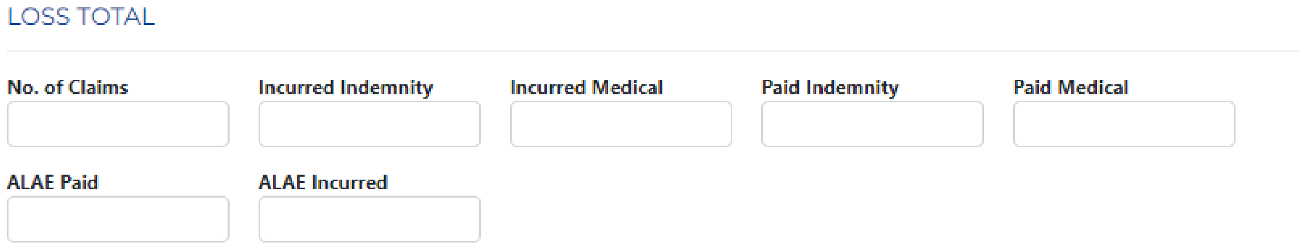


Users can find definitions of input fields in the Wisconsin Workers Compensation Statistical Plan Manual.

After selecting Save, the loss appears in the grid. To edit or delete the loss, use the Edit and Delete buttons on the left-hand side of the grid.

Loss Total

Tally up all losses and place them in the corresponding fields. ***Note:** this is not a required section. Ensure values are entered correctly to prevent additional follow-up.



When all fields have been entered for the unit statistical report, scroll to the top right of the screen to either Save or Cancel the unit transaction. To save, select the Save button at the top right of the screen. A pop-up box appears as confirmation.

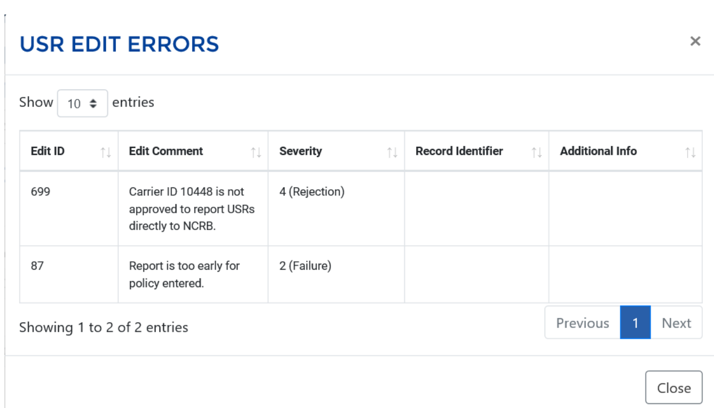
***Note:** Saving the unit *does not* submit the transaction to the Wisconsin Compensation Rating Bureau, it simply saves the unit statistical report in Manage Data.

<u>Validate</u>
After the unit has been saved, test validate the unit prior to submitting it to the Wisconsin Compensation Rating Bureau. ***Note:** unit statistical reports that are test validated are not submitted. The unit will still need to be submitted after validations are run.

To validate the unit prior to submitting, select the test validate button at the top left corner of the saved unit statistical report.

<u>The WCRB highly recommends using the Test Validate to confirm the unit is correct prior to submission.</u>

In Test Validate, the system will run edit validations on the data to ensure the reporting is correct prior to submission. A dialog box displays any edit IDs and comments found in the validation process. If any of the edits are rejected, the unit will not be accepted to our database and the errors should be resolved before submitting the unit to the Wisconsin Compensation Rating Bureau. Close the dialog box to return to the saved and **unsubmitted** unit statistical report.

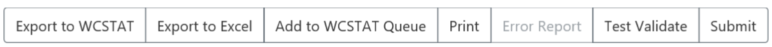


Submitting

After saving and validating the unit statistical report, use options at the top right of the screen:

With the (+) icon adds this unit to the My List Widget on the Dashboard. With the Trash Can icon the delete the unit statistical report completely. With the Pencil icon modify the unit data.

To the top left there are additional options:



Export to WCSTAT: Transfer this unit statistical report to the WC format.

Export to Excel: Create an Excel spreadsheet with the data entered for the unit.

Add to WCSTAT Queue: Add the unit to the WCSTAT Queue Widget on the Dashboard.

Print: Open a pdf copy of the unit for printing.

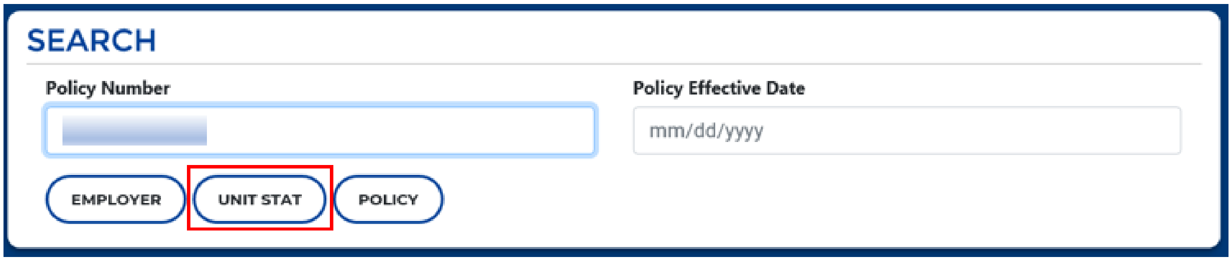
Test Validate: Test validate the unit again after any modifications are made.

Submit: This submits the full unit statistical report to the Wisconsin Compensation Rating Bureau. Once selected the system acknowledges that the unit was submitted and lists the status of the unit. Acknowledge the message by selecting OK, or OK and add to WCSTAT Queue to add the transaction to the WCSTAT Queue located on the dashboard.

How to Create a Unit Statistical Report Correction

It is possible to correct a previously submitted and accepted or rejected unit statistical report. To make a correction, find the unit statistical report that needs the change.

Go to the Dashboard and input the policy number for the unit in the Search widget and select the Unit Stat Button.



The search results show unit statistical reports submitted for that policy. By clicking the hyperlinked report number, the system shows the unit stat report screen.

To make a correction to the report, select the Create Correction button at the top of the screen.

A Create Correction dialog displays to select which correction type is needed. After selecting the correction type, hit the Create button. ***Note:** selecting a specific record to correct displays only that record for editing. To correct multiple records, select the Corrections to multiple record types [M] option.

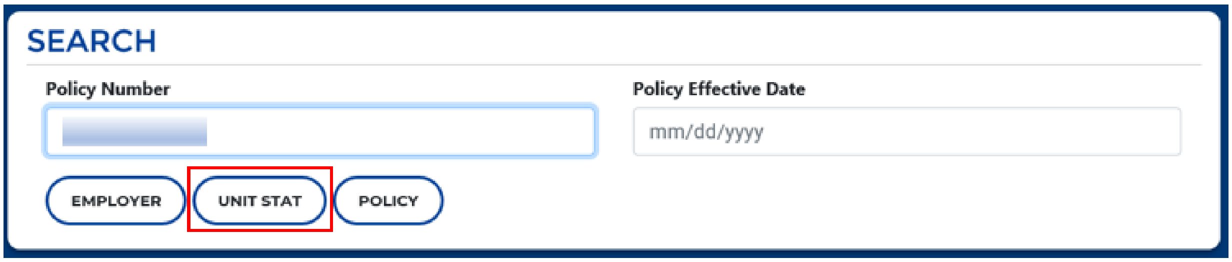
The unit statistical report displays with a copy of the stored unit data and the ability to edit any open fields.

For all sections on the left-hand side of the screen, edit or delete previously saved records or add new records. Once all records have been updated with the correct unit data, save, validate, and submit the unit statistical report data.

How to Create a Subsequent Unit Statistical Report

To create a subsequent unit statistical report, find the initial reported unit for that policy.

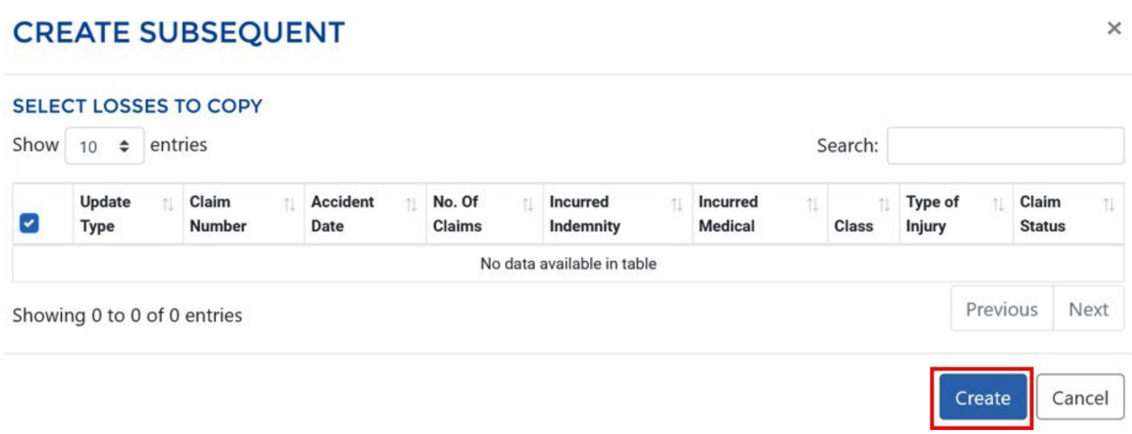
Go to the Dashboard and input the policy number for the unit in the Search widget and select the Unit Stat button.



The search results show all unit statistical reports submitted for that policy. Clicking the hyperlinked report number (Rpt. No.) 01 leads to the view unit stat report screen.

To make a subsequent report, select the Create Subsequent button at the top of the screen.

A dialog displays to select which losses to copy to the subsequent unit. If the initial unit does not have a loss reported, select Create.



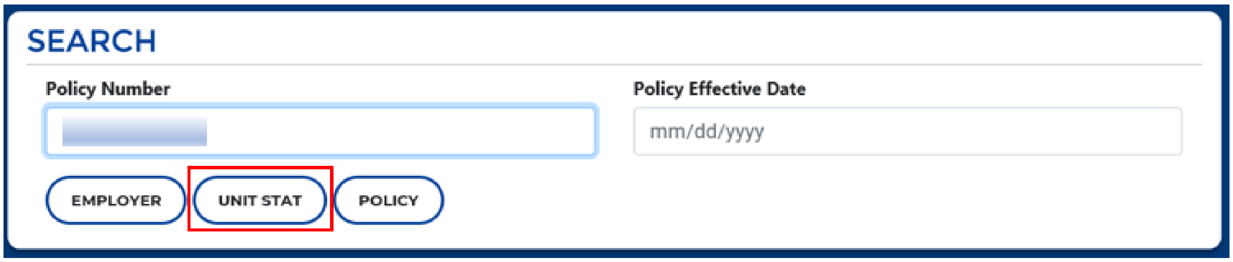
The unit statistical report will display with a copy of the stored unit data and the ability to edit any open fields.

For all sections on the left-hand side of the screen, edit or delete previously saved records or add new records. Once all records have been updated with the updated unit data, save, validate and submit the unit statistical report data.

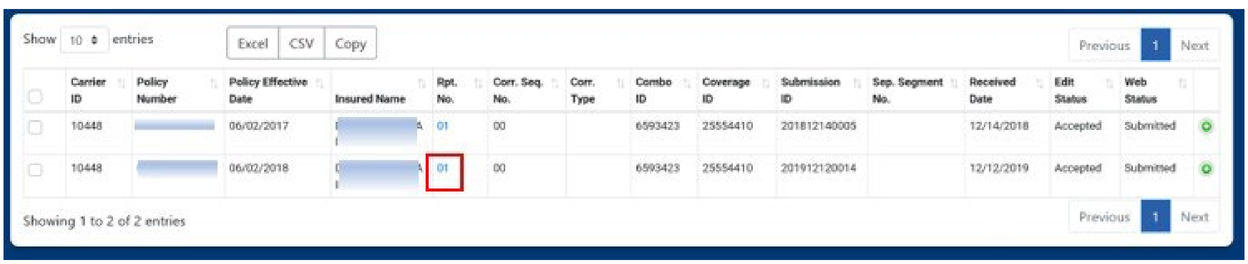
How to Create a Separated Data Unit Statistical Report

This function is used when a policy covers more than one risk, and the data needs to be separated out. Submit a separated unit report by copying the original unit containing the combined entities and then separating out the exposure and loss records for each entity.

To separate data between the entities, access the original submitted unit stat report. Navigate to the Dashboard and input the policy number for the unit in the Search Widget and select the Unit Stat button.



Search results show all unit statistical reports submitted for that policy. Clicking the hyperlinked report number (Rpt. No.), shows the View Unit Stat Report screen.

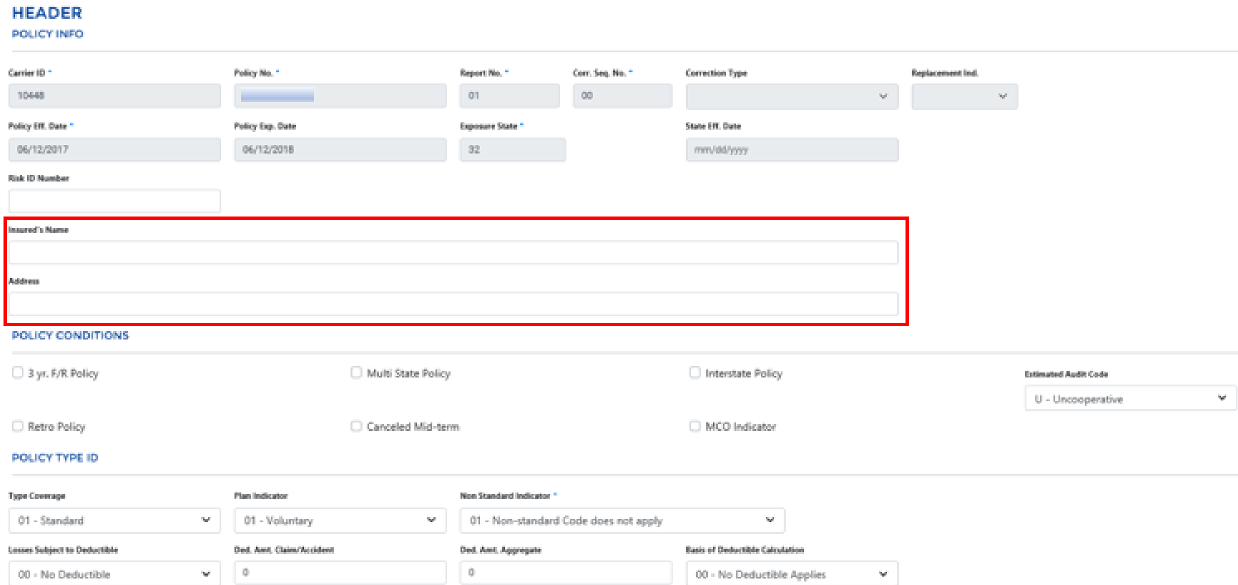


At the top left of the screen there is a button for Create Separated. Clicking this button generates a new unit statistical report that is identical to that which has already been submitted.

Update the submitted information to differentiate what records that were submitted belong to the separated entity.

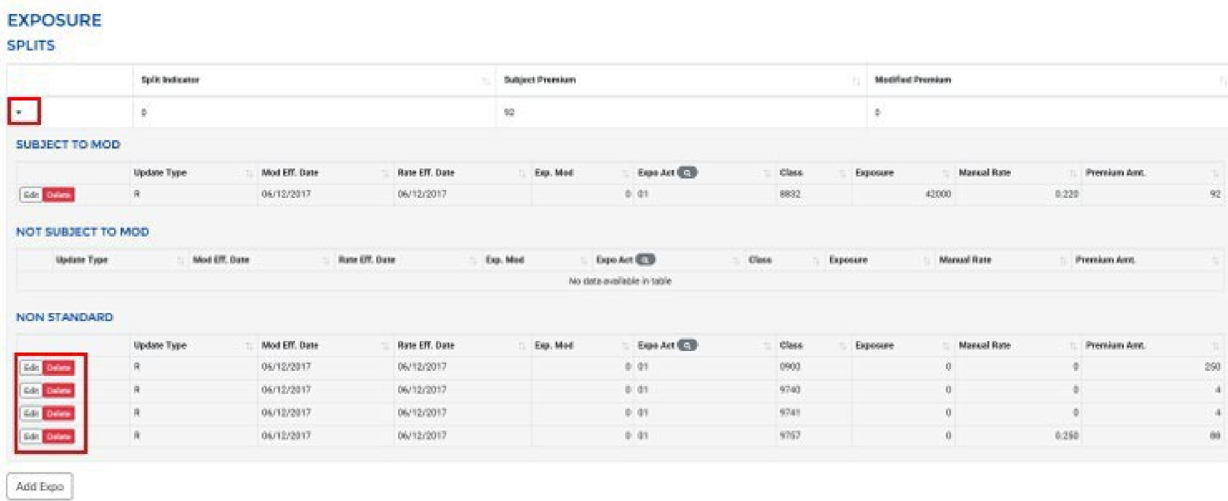
Header Record:

The unit will display grayed fields that are not editable. The insured name and address fields can be changed. This should be the name of the entity from the original unit report. Further down the page, update the report with the separated entities names.



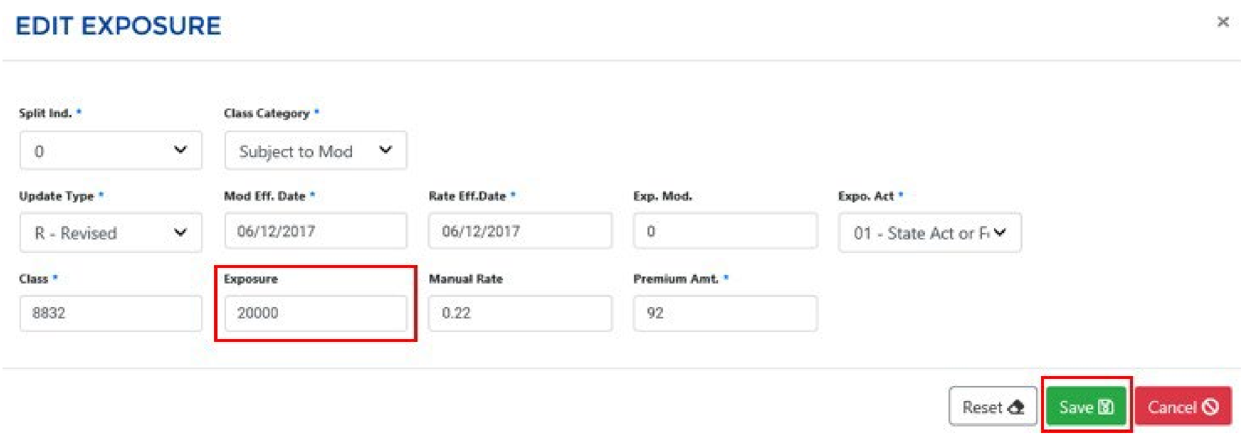
Exposure Record:

View the exposure details by clicking the arrow on the left- hand side of the screen. The exposure records shown are from the combined original unit statistical report that was submitted. Clicking the edit and delete fields on the left-hand side allows updates to the records to show what is contributed to the separated entity.



For example, this insured submitted $42,000 in exposure for class code 8832. Let's say their separated entity is responsible for $20,000 of that $42,000. Select the Edit button.

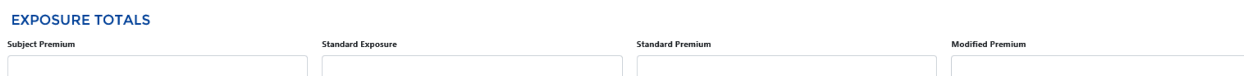
In the dialog box, update the Exposure number to reflect the exposure information for the separated entity. So, for this example delete the $42,000 and input the $20,000 this entity is responsible for. Once all edits have been made to the exposure, click the Save button and the system will change the record information on the grid.



If there are exposure records listed that are attributed to the first entity and not this separated entity, the user needs to delete them by selecting the delete button to the left. ***Note:** The exposure records displayed should reflect that of the separated entity only.

***Note:** if there is an additional exposure record that needs to be added, create a correction transaction to the original combined unit statistical report, not this separated USR.

Once the exposure information is updated for the separated entity the user will then need to update the exposure totals for this entity.

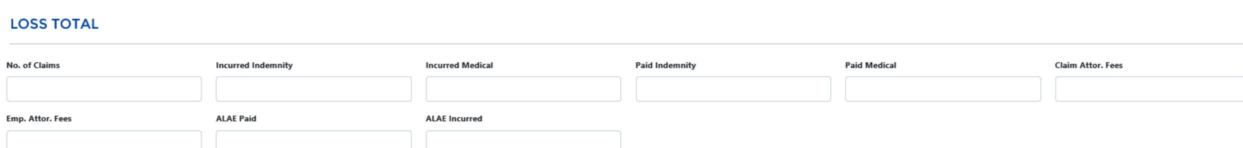


Loss Info Record:

Similar to the exposure records, the Loss Info Record will show all losses the insured has submitted from the original combined unit. If there are losses that do not apply to the separated entity, select the delete button. **The losses displayed should reflect that of the separated entity only.**

***Note:** If the separated entity has a loss that is not reflected here, create a correction transaction to the original combined unit statistical report, not this separated unit statistical report.

Once the loss information is updated, update the loss totals for this entity.



Separated Data Record:

The separated data record is the section of the unit to identify the separated entity.

Separated Segment Number: Enter the separated segment number. The first separated unit for the policy would be reported as a 01. When multiple separations occur on one policy, the segment numbers should be reported in sequential order 02, 03, and so forth.

Separated Date: This is the date the insured(s) separated from the original unit report data.

Separated Insured Name: This is the name of the person or business that is being separated from the existing unit statistical report.

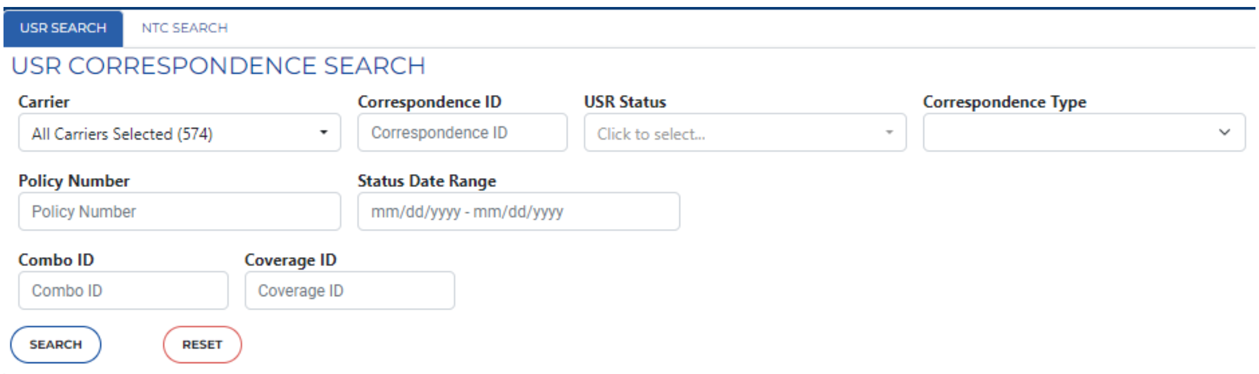
Previous Separated Segment Number: This is not a required field. However, if placed here it would be the previous separated number used for that policy. This is only used when correcting link data.

Once all records have been updated with the separated unit data the user will need follow the steps to save, validate and submit the unit statistical report data.

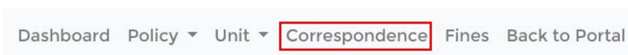
Correspondence Tab

How to Search for Correspondence

Search for all correspondence from the Wisconsin Compensation Rating Bureau via the



correspondence tab on the navigation menu.



On the Correspondence Search Screen, input search criteria to locate the stored correspondence sent to the carrier. The search is divided into USR or NTC.

USR Search

USR Search Fields

Correspondence ID: If specific correspondence ID is known, input that in this field.

USR Status: Narrow down by status, such as Delinquent and Pre-Delinquent.

Correspondence Type: Use the drop-down menu to select a specific type of correspondence.

Policy Number: Add the information to search for all correspondence for that specific policy.

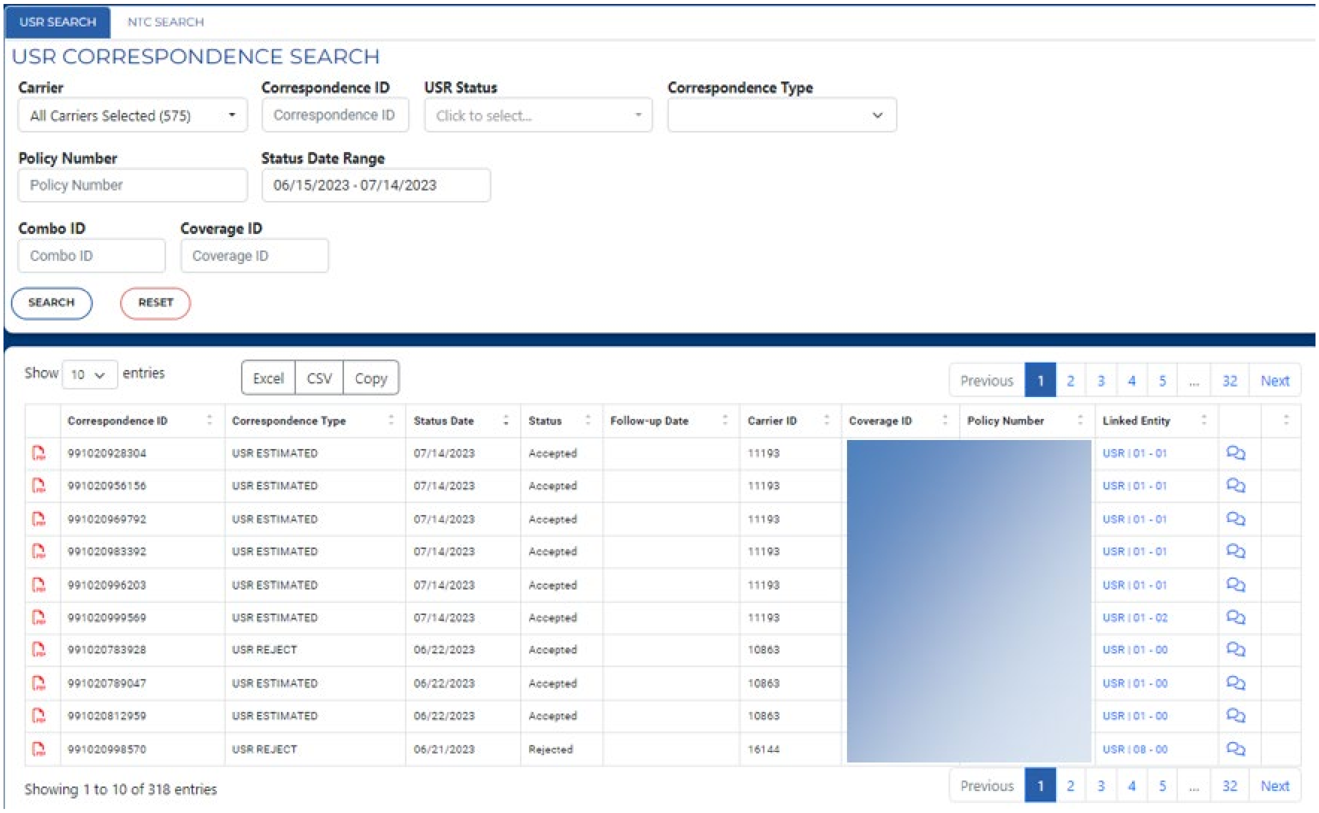
Status Date Range: Narrow down by specific time period.

Combo ID: Narrow down by specific ID.

Coverage ID: Narrow down by specific ID.

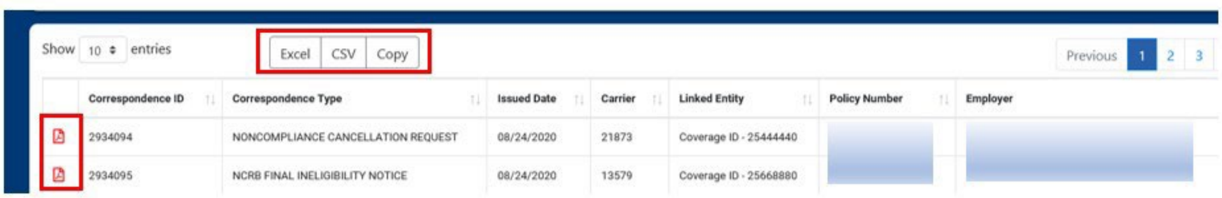
Coverage Effective Date: Add the effective date of the policy to further narrow the search for a specific correspondence.

Once all the criteria are entered, the search will display results in a sortable grid.



	Correspondence ID	Correspondence Type	Status Date	Status	Follow-up Date	Carrier ID	Coverage ID	Policy Number	Linked Entity		
	991020928304	USR ESTIMATED	07/14/2023	Accepted		11193			USR | 01 - 01		
	991020956156	USR ESTIMATED	07/14/2023	Accepted		11193			USR | 01 - 01		
	991020969792	USR ESTIMATED	07/14/2023	Accepted		11193			USR | 01 - 01		
	991020983392	USR ESTIMATED	07/14/2023	Accepted		11193			USR | 01 - 01		
	991020996203	USR ESTIMATED	07/14/2023	Accepted		11193			USR | 01 - 01		
	991020999569	USR ESTIMATED	07/14/2023	Accepted		11193			USR | 01 - 02		
	991020783928	USR REJECT	06/22/2023	Accepted		10863			USR | 01 - 00		
	991020789047	USR ESTIMATED	06/22/2023	Accepted		10863			USR | 01 - 00		
	991020812959	USR ESTIMATED	06/22/2023	Accepted		10863			USR | 01 - 00		
	991020998570	USR REJECT	06/21/2023	Rejected		16144			USR | 08 - 00		

Export the correspondence to Excel, CSV or Copy to the clipboard. To the left side there is also a pdf icon, clicking the icon the correspondence will open in another window.

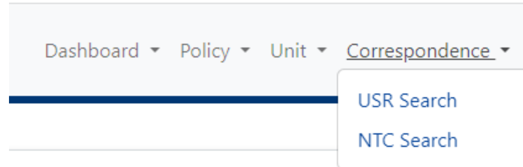


	Correspondence ID	Correspondence Type	Issued Date	Carrier	Linked Entity	Policy Number	Employer
	2934094	NONCOMPLIANCE CANCELLATION REQUEST	08/24/2020	21873	Coverage ID - 25444440		
	2934095	NCRB FINAL INELIGIBILITY NOTICE	08/24/2020	13579	Coverage ID - 25668880		

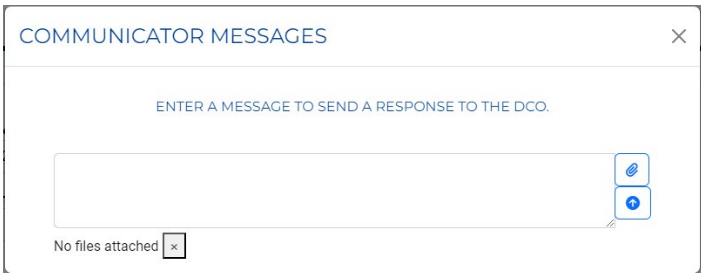
Hover above the dialogue bubbles  in the column on the right display the status. The color changes based on status: Green = Answered/Complete, Yellow = Under DCO Review, White = Unanswered. Clicking the dialogue bubble brings up a pop-up box with a free text field to respond to the USR message. A paperclip icon allows for attachments. An up arrow icon sends the response.

View and Respond to USR Letters

Navigate to the USR Correspondence Search via the Correspondence Tab. Use Correspondence ID search field criteria for fastest results (if known). Otherwise, search using known criteria: Carrier, USR Status, Correspondence Type, Policy Number, Status Date Range, Combo ID and/or Coverage ID.



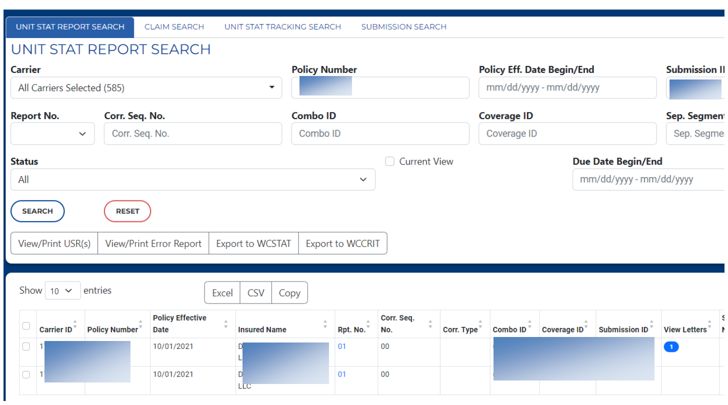
Use the PDF icon on the left to view a printable version of the USR letter. Use the dialogue icon on the right to enter a response.



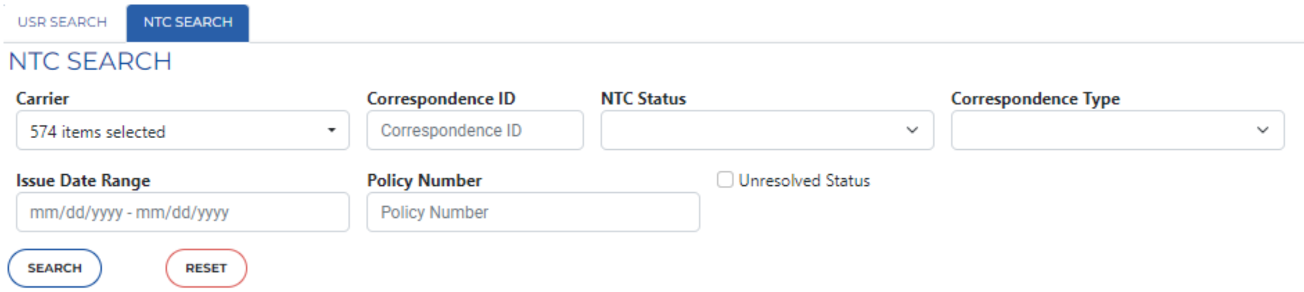
Type a message into the blank box. Use the up-arrow button to send the response.

The paperclip button allows a user to add an attachment.

If the Unit Stat Report Search displays a badge in the View Letters Column, clicking on it leads to the USR Correspondence Search tab.



NTC Search



Toggle between USR Search and NTC Search using the tabs along the top of the search box.

NTC Search Fields

<u>Correspondence ID:</u> If the specific correspondence ID is known input that in this field.

<u>NTC Status:</u> Narrow down by status, such as Unanswered Fined, or Advisory.

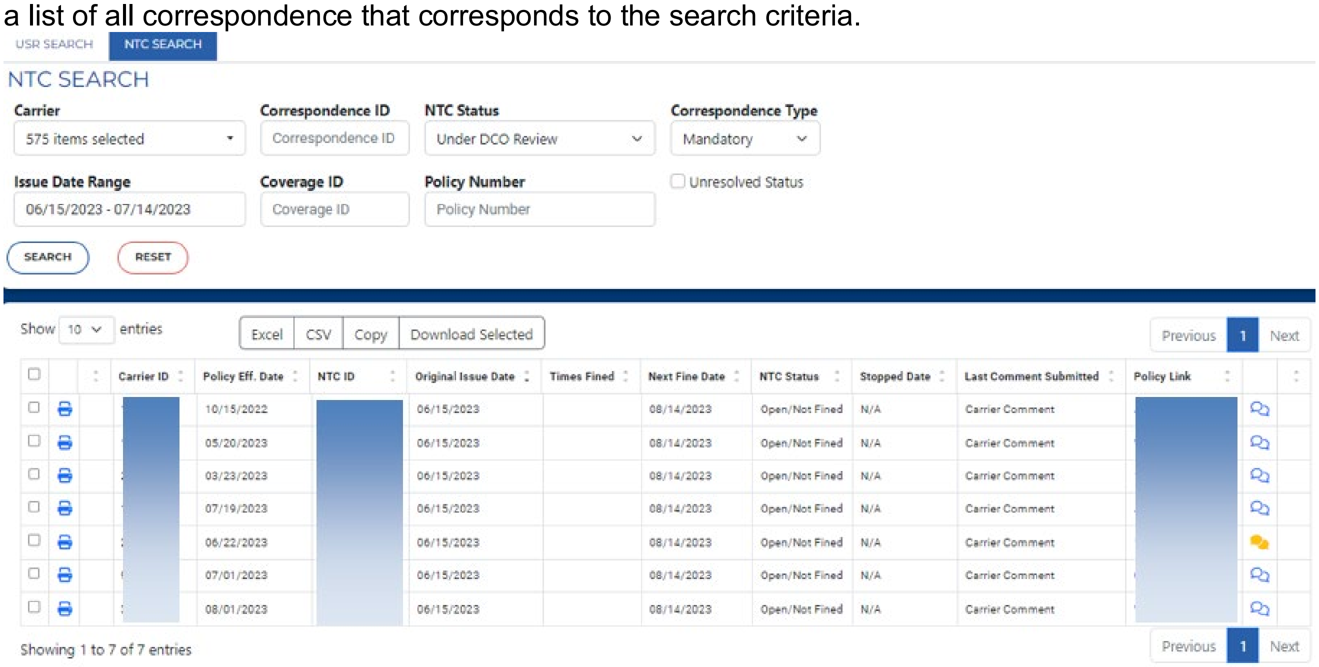
<u>Correspondence Type:</u> Use the drop-down menu to select a specific type of correspondence.

<u>Issue Date Range:</u> Add a date range to find all correspondence that occurred during that time.

<u>Policy Number:</u> Add the information to search for all correspondence for that specific policy.

<u>Unresolved Status checkbox:</u> Narrow down by status of unresolved.

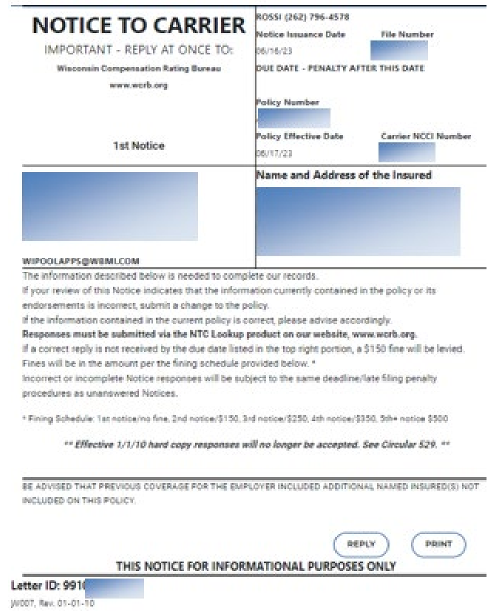
After adding the search criteria, select the search button to show the results. The results section has a list of all correspondence that corresponds to the search criteria.



Notice to Carrier (NTC) letters that are not connected to a policy or coverage ID should be listed first in the results grid, if any. These events are uncommon, but if they occur carriers can respond to match them appropriately to a policy.

View and Respond to NTCs

Hovering above the dialogue bubbles in the column on the right display the status. The color changes based on status: Green = Answered/Complete, Yellow = Under DCO Review, White = Unanswered.



NOTICE TO CARRIER

IMPORTANT - REPLY AT ONCE TO:

Wisconsin Compensation Rating Bureau

www.wcrb.org

1st Notice

WIPOOLAPPS@WBMI.COM

ROSSI (262) 796-4578

Notice Issuance Date: 06/16/23

File Number

DUE DATE - PENALTY AFTER THIS DATE

Policy Number

Policy Effective Date: 06/17/23

Carrier NCCI Number

Name and Address of the Insured

The information described below is needed to complete our records.
If your review of this Notice indicates that the information currently contained in the policy or its endorsements is incorrect, submit a change to the policy.
If the information contained in the current policy is correct, please advise accordingly.
Responses must be submitted via the NTC Lookup product on our website, www.wcrb.org.
If a correct reply is not received by the due date listed in the top right portion, a $150 fine will be levied.
Fines will be in the amount per the fining schedule provided below. *
Incorrect or incomplete Notice responses will be subject to the same deadline/late filing penalty procedures as unanswered Notices.

* Fining Schedule: 1st notice/no fine, 2nd notice/$150, 3rd notice/$250, 4th notice/$350, 5th+ notice $500

***** Effective 1/1/10 hard copy responses will no longer be accepted. See Circular 529. *****

BE ADVISED THAT PREVIOUS COVERAGE FOR THE EMPLOYER INCLUDED ADDITIONAL NAMED INSURED(S) NOT INCLUDED ON THIS POLICY.

REPLY PRINT

THIS NOTICE FOR INFORMATIONAL PURPOSES ONLY

Letter ID: 991

JW007, Rev. 01-01-10

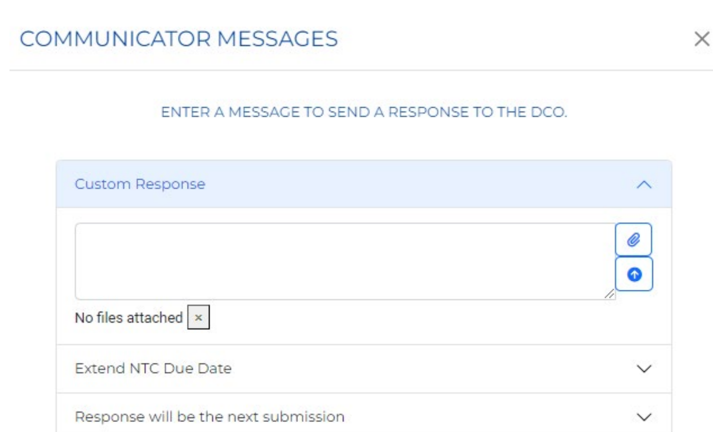
Checking NTC Due Dates

If there is a Due Date on the NTC, it will be listed on the upper right of the letter under Due Date – Penalty After This Date.

Submitting NTC responses

When there is an NTC, they can click on the hyperlinked NTC ID to navigate to the notice. At the bottom of the notice are two buttons that allow a Reply or Print.

REPLY PRINT



Clicking Reply brings up a pop-up box with a free text field. To the right of the field is a paperclip icon for adding attachments. There is also an upward arrow icon for adding response.

There are also drop-down options to request a due date extension and an option to respond on the next submission.

Summary of Changes

Version	Date	Editor	Changes
1.0	1/16/25	Allia Nelson	Data Retention section changed to table. Purging information added
1.0	1/7/25	Allia Nelson	Data Retention section added.
1.0	8/13/24	Allia Nelson	Add Policy to Tracking by Category Widget. Add Fining to Glossary.
1.0	6/25/24	Allia Nelson	Deleting Endorsements clarification added.
1.0	6/3/24	Allia Nelson	WCCRIT button image added
1.0	5/2/24	Allia Nelson	WCPOLS/WCSTAT Queue widget clarification for internal use.
1.0	4/30/24	Allia Nelson	WCPOLS/WCSTAT widgets added nightly batch process time. Glossary added Correspondence ID
1.0	3/5/2024	Allia Nelson	Indicated Notifications Widget is not in use for WI.
1.0	2/21/2024	Allia Nelson	Updated grammar for concise instructions using active verbiage. Added External Links section.
1.0	9/8/2023	Allia Nelson	Added View & Respond to USR Letter section. Titled View & Respond to NTC section for ease of navigation.
1.0	9/5/2023	Allia Nelson	Removed Communicator Tab section. Ratio of Failed Policy Transactions renamed to Ratio of Rejected. Mention of Fines Tab removed.
1.0	8/3/2023	Allia Nelson	Initial Draft

External Links

Policy Electronic Reporting Instructions/WCPOLS Submission Instructions
https://www.wcrb.org/manuals/WCPOLS-SubmissionInstructions.pdf

WCRB Manuals
https://www.wcrb.org/manuals/

Wisconsin Workers Compensation Statistical Plan Manual
https://www.wcrb.org/manuals/WI_WORKERS_COMP_STATISTICAL_PLAN_MANUAL.pdf

Workers Compensation Insurance Organizations
https://www.wcio.org/wcio-specifications-and-related-documents

Glossary

Badge: a clickable icon located throughout the program. May be a circle/oval with number inside, often gray, blue, green, yellow or red. Examples: 2 60589

Correspondence ID: This term is interchangeable with Letter ID and NTC ID.

FEIN: Federal Employer Identification Number. A 9-digit unique number assigned by the IRS.

Fines/Fining: WCRB fines insurers for the following:
- Failure to resolve a Notice to Carrier within the allowable time.
- Late filing of a unit statistical report and/or failure to resolve a unit statistical report rejection.
- Filing an Estimated unit statistical report and failing to update with audited data within the allowable time.
- Late Filing of a Policy (received by WCRB over 60 days after the Policy Effective Date).

NTC: Notice to Carrier

Rpt-Corr: Report Correction

Rpt. No.: Report Number. When this field is a blue hyperlink, it navigates to the unit statistical report.

Transaction Statuses:

Unmatched: One or more of the transactions in a submission required manual action by the WCRB.

Processed: The policy is stored on the WCRBs database.

Rejected: The transaction has not been stored and has been rejected. The reject reason can be viewed on the Transaction Rejection Report.

Accepted: The transaction has been stored on the policy without error.

Accepted with Errors: The transaction has been stored on the policy with errors that can be viewed on the Error Reports.

USR: Unit Statistical Report