



Wisconsin Compensation Rating Bureau

## **Manage Data User Guide**

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**Effective: April 1, 2024**

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## Before You Start...

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.

**Note:** 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

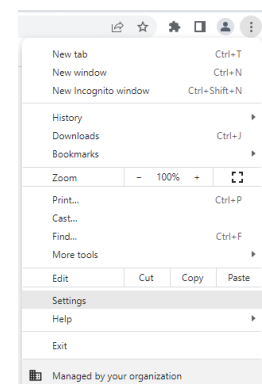
If a pop-up blocker is installed, allow pop-ups from the WCRB website. To allow pop-ups from the WCRB website using Google Chrome, follow these procedures:

### 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.

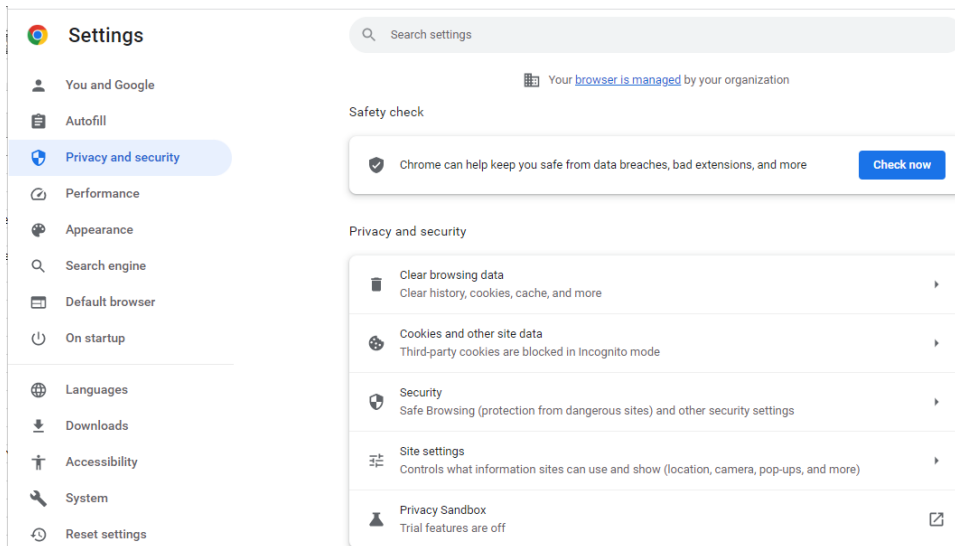
### Step 2:

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



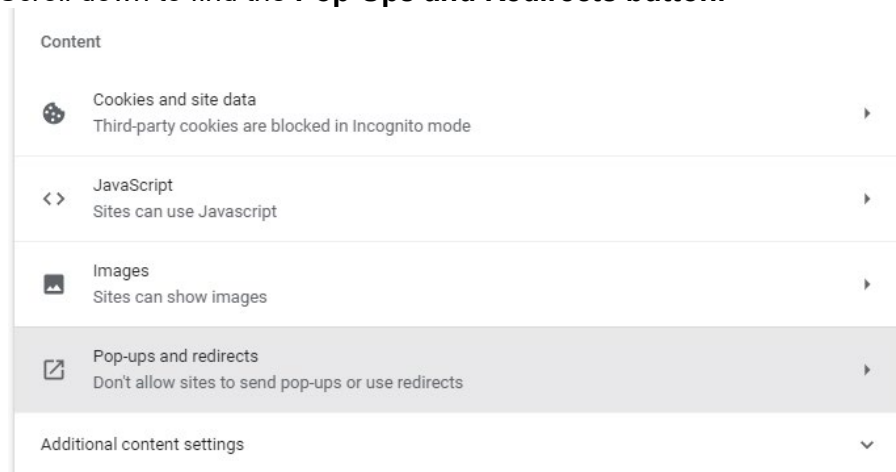
### Step 3:

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



### Step 4:

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

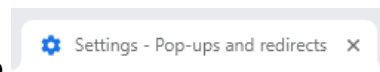


### Step 5:

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.

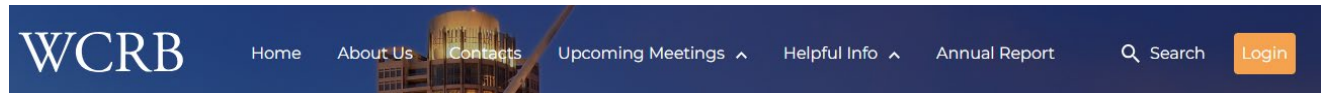


## System Timeout

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:

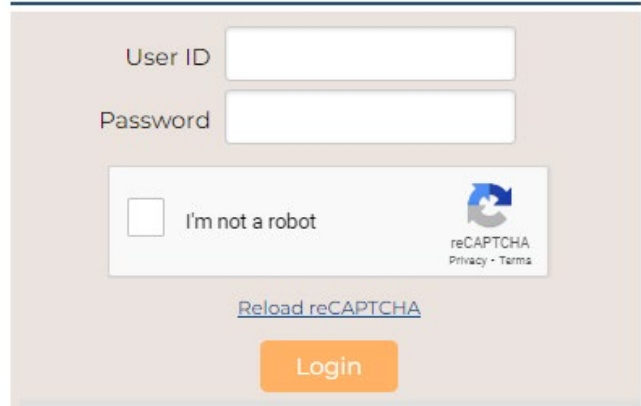
On the WCRB website (<http://www.wcrb.org>), click the Login button in the upper right corner. This leads to the Member Products login page.

## 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.

## Member's Area



## 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.

## Products

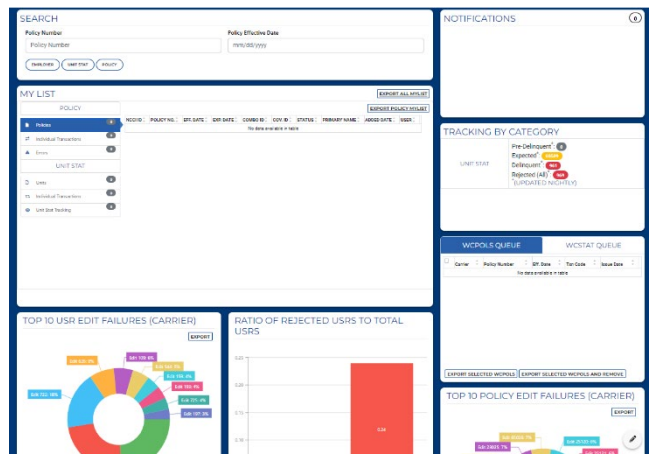
- [Annual Rate Filings](#)
- [Carrier Assessment](#)
- [Carrier Elections](#)
- [Class Code Historical Performance](#)
- [Depopulation Report](#)
- [Experience Modification Calculation](#)
- [Experience Modification Lookup](#)
- [Experience Rating Worksheet](#)
- [Inspection History Lookup](#)
- [Invoice Information](#)
- [Manage Data](#)

## 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.

To the right is an example of the Data Submitter Dashboard.

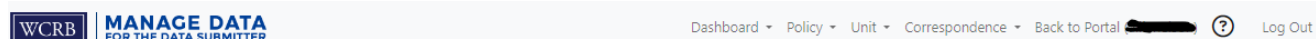
There are multiple ways to navigate Manage Data. From the main screen is a row of tabs at the top called the Navigation Menu. These tabs have drop downs that will navigate to different sections of the application.




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.

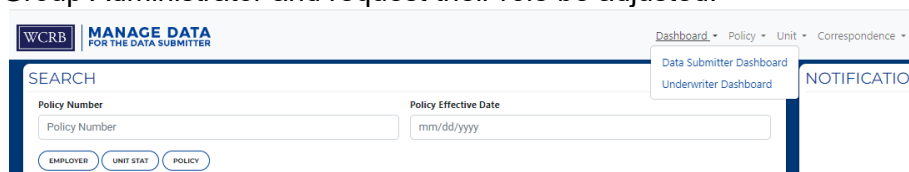


**Insured Name:** When the Insured Name is hyperlinked, select it and navigate to the Employer Chronicle page. See employer information, such as the experience modification.


**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.

## 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.

EXPERIENCE RATING SEARCH

Employer Name  Zip Code

Policy Number  Combo ID  FEIN

SEARCH RESET

OR

Issue Date Range

RATINGS ISSUED:

Last 7 days: 9

Last 30 days: 20

Last 90 days: 345

SEARCH RESET

Combo ID	Employer Name	Latest Mod	ARAP Factor	Rating Effective Date	Zip Code
No data available in table					

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.

Combo ID	Employer Name	Latest Mod	ARAP Factor	Rating Effective Date	Zip Code
6737994		0.97		02/12/2022	27527

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.

**1 TOTAL INSURED**

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

Rating Eff. Date
02/12/2022
05/23/2021

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.

Showing 1 to 2 of 2 entries

Hide Revisions	Show Revisions	Excel	CSV	PDF
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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.

Combo ID	Employer Name	Rating Effective Date	Mod Factor	Rating Result	Issue Date
6452350		02/26/2022	1.15	Experience Rated	02/26/2021
6622804		02/23/2022	0.97	Experience Rated	02/27/2021

Combo ID	Employer Name	Carrier ID
6452350		80411
6622804		
6737994		
6622804		

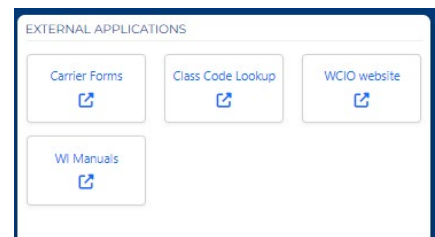
Clicking the arrow on the far left will display a drop down to show additional information about the employer's experience rating for a specific policy period.

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.

NCCI ID	POLICY NO.	EFF. DATE	EXP. DATE	COMBO ID	COV. ID	STATUS	PRIMARY NAME	ADDED DATE	USER
No data available in table									

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

## Policy:

The screenshot shows a sidebar menu for the 'POLICY' section. It contains three items: 'Policies' with a count of 1, 'Individual Transactions' with a count of 5, and 'Errors' with a count of 2. Arrows point from each item to a descriptive text:

- Policies (1):** Flagged stored policies in Manage Data
- Individual Transactions (5):** Flagged individual policy transactions
- Errors (2):** Flagged policies with an error


## Unit Stat:

The screenshot shows a sidebar menu for the 'UNIT STAT' section. It contains three items: 'Units' with a count of 0, 'Individual Transactions' with a count of 0, and 'Unit Stat Tracking' with a count of 6. Arrows point from each item to a descriptive text:


- Units (0):** Flagged stored units in Manage Data
- Individual Transactions (0):** Flagged individual unit transactions
- Unit Stat Tracking (6):** Flagged unsubmitted units in Manage Data

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.

The screenshot shows the 'MY LIST' table with two export buttons at the top right: 'EXPORT ALL MYLIST' and 'EXPORT POLICY TRANSACTIONS MYLIST'. Arrows point from these buttons to descriptive text:

- EXPORT ALL MYLIST:** Export entire My List
- EXPORT POLICY TRANSACTIONS MYLIST:** Export specific list of transactions

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

The screenshot shows an Excel spreadsheet with the following columns: NCCI ID, POLICY NO., EFF. DATE, COMBO ID, COV. ID, DAYS DUE, NOTIFY DATE, ERROR ID, and ERROR MSG. The data rows are:

	NCCI ID	POLICY NO.	EFF. DATE	COMBO ID	COV. ID	DAYS DUE	NOTIFY DATE	ERROR ID	ERROR MSG.
1	13161	13WBCEU4646	02/14/2020			30-90 days	01/16/2020	17880115	We have not received the original policy for this policy
2	13161	22WBCEK2206	02/01/2019	6218413	22129540	30-90 days	01/16/2020	17881685	Multiple mailing addresses reported on change transac

## 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.

OUTSTANDING ASSIGNED RISK POLICIES

Coverage ID:

Insured Name:

Policy Number:

Payment Confirmation:

Effective Date:

Assign Date:

Status:

Coverage ID	Insured	Policy Number	Effective Date	Payment Confirmation	Assign Date	Days Outstanding
No data available in table						

**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.

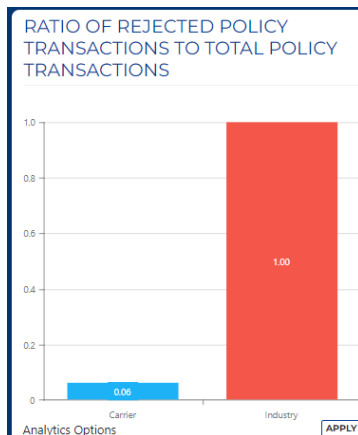
**Policy Number:** Input the policy number for the employer.

**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



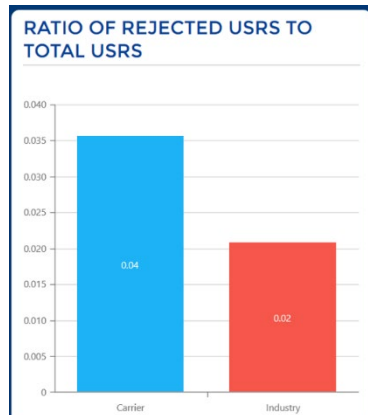
This analytics widget shows the ratio of the carrier's rejected policy transactions to all policy transactions that have been submitted. Displayed next to that is the same ratio for the industry as a whole.

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.

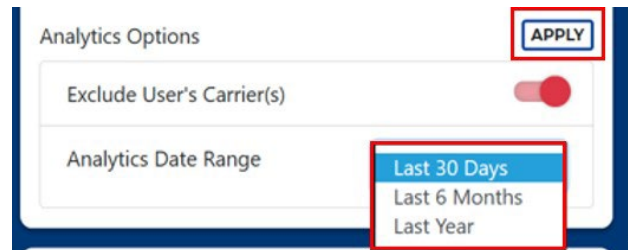
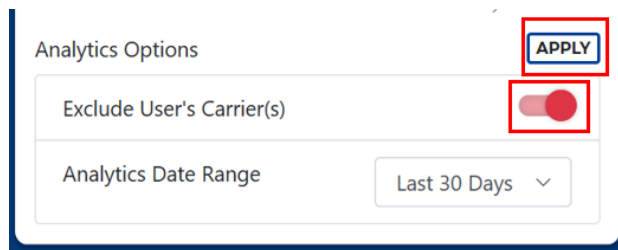
## Ratio of Rejected USRs to Total USRs Widget



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.

**\*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.

## Search Widget

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

### SEARCH

---

**Policy Number**

**Policy Effective Date**

EMPLOYER

UNIT STAT

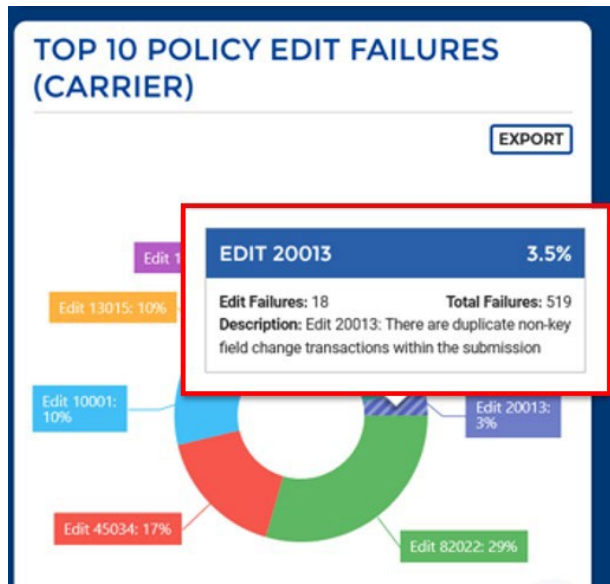
POLICY

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



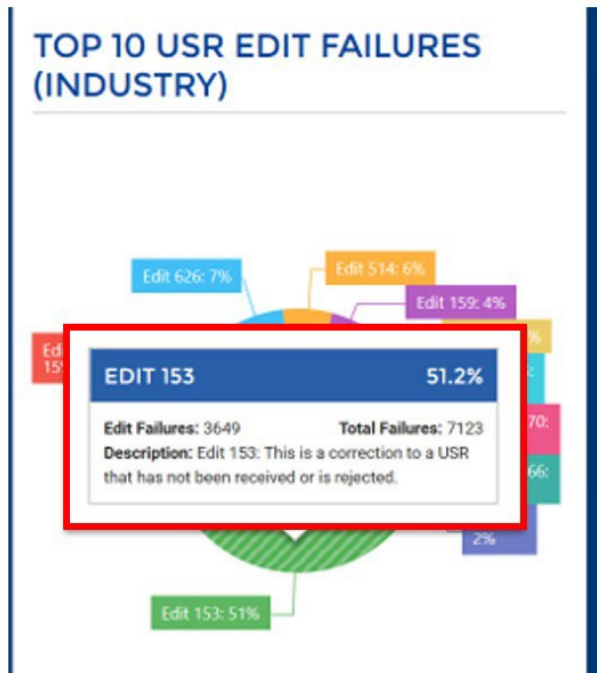
This widget has two parts. The first shows the top 10 policy edit failures the specific user's company has. The second part shows the top 10 policy edit failures of the industry as a whole.

Hover over pieces of the graph to get additional information in a tooltip. 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



This widget has two parts. The first shows the top 10 edit failures the specific user's company has while the second shows the top 10 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.

Analytics Options

APPLY

- Edit Severity: Warning
- Edit Severity: Failure
- Edit Severity: Error
- Edit Severity: Failure & Stop USR
- Exclude User's Carrier(s)

Analytics Date Range: Last 30 Days

Analytics Options

APPLY

- Edit Severity: Warning
- Edit Severity: Failure
- Edit Severity: Error
- Edit Severity: Failure & Stop USR
- Exclude User's Carrier(s)

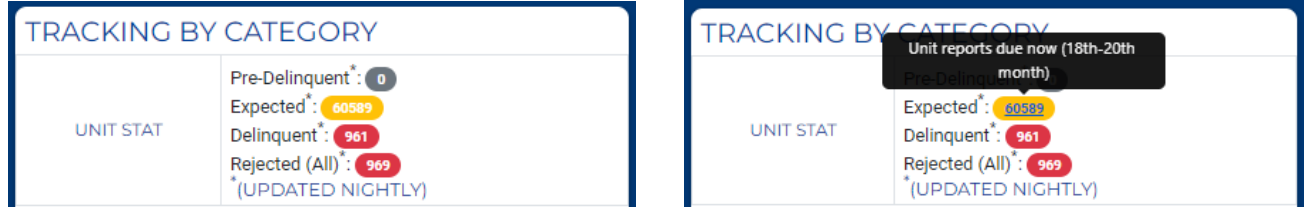
Analytics Date Range: Last 30 Days, Last 6 Months, Last Year

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.

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 the Unit Stat Tracking Search page with the individual unit statistical 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**.

## 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.

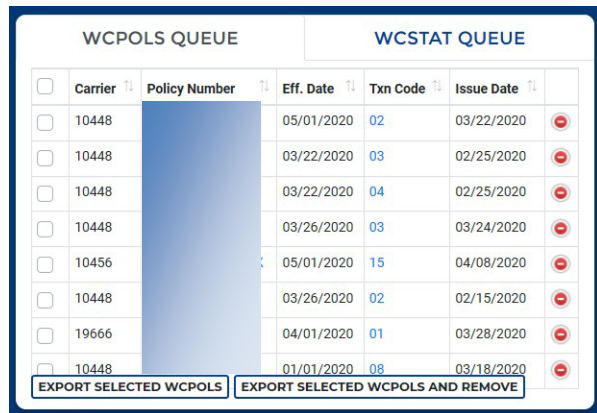
**Status Date Range:** Add a date range to find all correspondence issued during that time.

**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

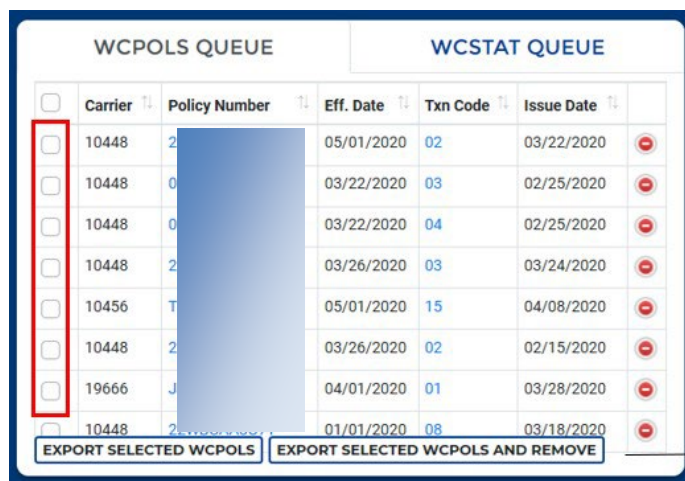


WCPOLS QUEUE		WCSTAT QUEUE				
<input type="checkbox"/>	Carrier	Policy Number	Eff. Date	Txn Code	Issue Date	
<input type="checkbox"/>	10448		05/01/2020	02	03/22/2020	⊖
<input type="checkbox"/>	10448		03/22/2020	03	02/25/2020	⊖
<input type="checkbox"/>	10448		03/22/2020	04	02/25/2020	⊖
<input type="checkbox"/>	10448		03/26/2020	03	03/24/2020	⊖
<input type="checkbox"/>	10456		05/01/2020	15	04/08/2020	⊖
<input type="checkbox"/>	10448		03/26/2020	02	02/15/2020	⊖
<input type="checkbox"/>	19666		04/01/2020	01	03/28/2020	⊖
<input type="checkbox"/>	10448		01/01/2020	08	03/18/2020	⊖

EXPORT SELECTED WCPOLS    EXPORT SELECTED WCPOLS AND REMOVE

The WCPOLS/WCSTAT Queue allows the user to view policies and/or unit statistical reports waiting to be exported to WCRB. 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 to 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.



WCPOLS QUEUE		WCSTAT QUEUE				
<input type="checkbox"/>	Carrier	Policy Number	Eff. Date	Txn Code	Issue Date	
<input type="checkbox"/>	10448		05/01/2020	02	03/22/2020	⊖
<input type="checkbox"/>	10448		03/22/2020	03	02/25/2020	⊖
<input type="checkbox"/>	10448		03/22/2020	04	02/25/2020	⊖
<input type="checkbox"/>	10448		03/26/2020	03	03/24/2020	⊖
<input type="checkbox"/>	10456		05/01/2020	15	04/08/2020	⊖
<input type="checkbox"/>	10448		03/26/2020	02	02/15/2020	⊖
<input type="checkbox"/>	19666		04/01/2020	01	03/28/2020	⊖
<input type="checkbox"/>	10448		01/01/2020	08	03/18/2020	⊖

EXPORT SELECTED WCPOLS    EXPORT SELECTED WCPOLS AND REMOVE

Button to export, or export and delete

- **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

File Name	Status
Policy File-Sample.20200730100558	The file queued is to process and will begin processing on 07/30/2020 11:42:42

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


Carrier ID	File Name
------------	-----------

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. The data from the file will not get loaded into the system using this Test Validation widget. 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. 

Carrier ID	File Name
No errors	
Errors 11347	
Errors 10804	

**\*Note:** To make corrections to errors and resubmit a file for validation, change the file name. 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.

The screenshot shows a search interface with two input fields: 'Policy Number' and 'Policy Effective Date'. Below the fields are three buttons: 'EMPLOYER', 'UNIT STAT', and 'POLICY'. The 'EMPLOYER' button is highlighted with a red rectangular box.

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.

The screenshot shows a table with columns: Combo ID, Rating Eff. Date, Rating Result, Interstate ID, Mod Factor, Name, and Address. The first row is expanded to show a sub-table with columns: Coverage ID, Insured Name, Address, Foreign Addr. Ind., Area, and Country. The 'EMPLOYER' button from the previous screenshot is visible on the left side of the table.

Combo ID	Rating Eff. Date	Rating Result	Interstate ID	Mod Factor	Name	Address												
6744603				0.00														
<table border="1"> <thead> <tr> <th>Coverage ID</th> <th>Insured Name</th> <th>Address</th> <th>Foreign Addr. Ind.</th> <th>Area</th> <th>Country</th> </tr> </thead> <tbody> <tr> <td>27205280</td> <td></td> <td></td> <td>N</td> <td></td> <td></td> </tr> </tbody> </table>							Coverage ID	Insured Name	Address	Foreign Addr. Ind.	Area	Country	27205280			N		
Coverage ID	Insured Name	Address	Foreign Addr. Ind.	Area	Country													
27205280			N															

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.

The screenshot shows a detailed view of a policy record. It includes a table for Policy Information and a table for Split Information.

Policy Number	NCCI ID	Period Eff. Date	Period Exp. Date	Cov. Eff. Date	Cov. Exp. Date	Status	ARAP Factor	Missing Units?
	10456	07/25/2019	07/25/2020	07/25/2019	07/25/2020	CANC	1.00	N
	10456	07/25/2018	07/25/2019	07/25/2018	07/25/2019	ACTIVE	1.00	N

Submission ID	USR ID	Rpt - Corr	Status	Accepted Date
202001280007	000000186	01 - 00	Accepted	01/29/2020

Split	Mod	Class	Cov	Premium	Payroll
0	0	0900	01	250	0
0	0	8742	01	917	195123
0	0	9740	01	20	0
0	0	9741	01	39	0
0	0	9807	01	7	0

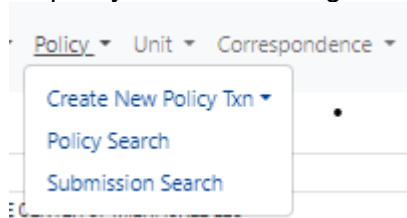
  

Claim #	Accident Date	Class	Inj	Cov	Indemnity	Medical	Recovery Type	Claim Status
No data available in table								

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

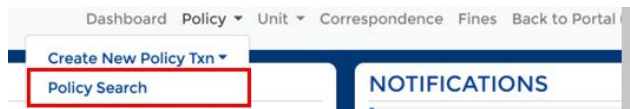
Search for a policy, policy transaction, or submission, and create new policy transactions from the policy tab on the navigation menu.



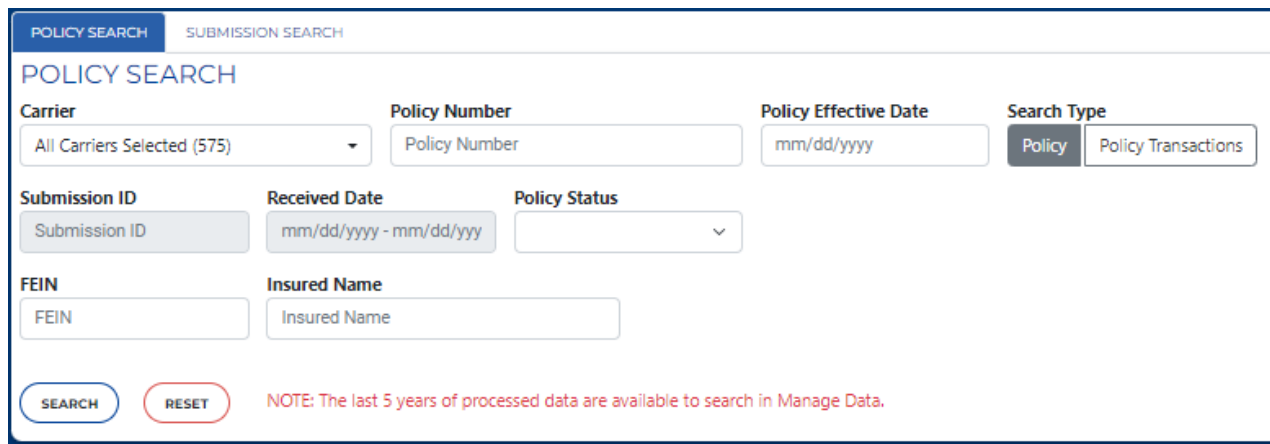
### How to Search for A Policy Transaction

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.



**POLICY SEARCH** SUBMISSION SEARCH

**POLICY SEARCH**

Carrier: All Carriers Selected (575) | Policy Number: Policy Number | Policy Effective Date: mm/dd/yyyy | Search Type: Policy (selected), Policy Transactions

Submission ID: Submission ID | Received Date: mm/dd/yyyy - mm/dd/yyyy | Policy Status: [Dropdown]

FEIN: FEIN | Insured Name: Insured Name

SEARCH RESET NOTE: The last 5 years of processed data are available to search in Manage Data.

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.

**Submission ID:** This is not a required field; enter this information if known.

**Received Date:** Narrow the search with this option.

**Policy Status:** Use the drop-down menu to choose a policy status.

**FEIN:** Input the employer FEIN here.

**Insured Name:** Input the employer name here.



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

### **Policy Search Type**

In the policy results section is a list of stored policies that correspond to the search criteria.

The screenshot shows a 'POLICY SEARCH' form with the following fields: Policy Number, Policy Effective Date (mm/dd/yyyy), Search Type (Policy, Policy Transactions), Submission ID, Received Date (mm/dd/yyyy - mm/dd), Policy Status (dropdown), FEIN, and Insured Name. There are 'SEARCH' and 'RESET' buttons. Below the form is a table with columns: Carrier ID, Policy Number, Coverage ID, Policy Eff. Date, Insured Name, Address, Txn. Issue Date, Txn. Code, Status, Submission Id, and Received Date. The table contains two rows of data. On the right side of the table, there are 'Previous', '1', and 'Next' navigation buttons. A red box highlights the 'SEARCH' button and the table area.

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.

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

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

This screenshot is a zoomed-in view of the table from the previous screenshot. It shows the 'Excel', 'CSV', and 'Copy' buttons highlighted with a red box. The table has four rows of data with Carrier ID 10448. On the right side of the table, there are 'Previous', '1', and 'Next' navigation buttons. A red box highlights the 'Excel', 'CSV', and 'Copy' buttons.



## 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.

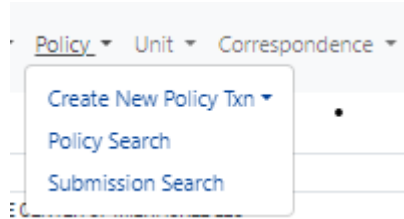
Carrier ID	Policy Number	Coverage ID	Policy Eff. Date	Insured Name	Address	Txn. Issue Date	Txn. Code	Status	Submission Id	Received Date
13161		25209710	02/14/2014			07/01/2014	15	Accepted	210886	07/02/2014
13161		25209710	02/14/2014			07/08/2014	10	Accepted	211544	07/09/2014

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.

Show 10 entries    Excel   CSV   Copy

Previous   1   ...   10   **11**   12   ...   350   Next

Submission ID	File Name	Submission Status	Total Record Count	# of Accepted Txns	# of Rejected Txns	# of Unmatched Txns	Received Date	Processed Date	
		Rejected	4746				05/11/2023		<a href="#">Submission Reject Report</a>
		Rejected	2987				05/15/2023		<a href="#">Submission Reject Report</a>

## 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](mailto: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.

**Information Page** INFORMATION PAGE

Insured Names 0

Addresses 0

Premium 0

Exposure 0

Endorsements 0

Edit Runs 0

Quick Links ▾

**Carrier ID \***  **Policy Number \***  **Effective Date \***  **Issue Date \***  **Txn. Code \***

**Expiration Date \***  **Primary Name**

**Type of Plan ID Code \***  **Producer Name**  **Prior Policy Number**

### 3A/3C States

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

**3A/3C STATES**

**3A State(s)** **3C State(s) Include** **3C State(s) Exclude**

**NC,VA**

- TX - TEXAS
- UK - UNITED KINGDOM
- UT - UTAH
- VT - VERMONT
- VI - VIRGIN ISLANDS
- VA - VIRGINIA
- WA - WASHINGTON
- WV - WEST VIRGINIA
- WI - WISCONSIN
- WY - WYOMING
- YT - YUKON TERRITORY

**SC**

- PE - PRINCE EDWARD ISLAND
- PR - PUERTO RICO
- PQ - QUEBEC
- RI - RHODE ISLAND
- SK - SASKATCHEWAN
- SC - SOUTH CAROLINA
- SD - SOUTH DAKOTA
- TN - TENNESSEE
- TX - TEXAS
- UK - UNITED KINGDOM
- UT - UTAH

**GA**

- BC - BRITISH COLUMBIA
- CA - CALIFORNIA
- CN - CANADA
- CO - COLORADO
- CT - CONNECTICUT
- DE - DELAWARE
- DC - DISTRICT OF COLUMBIA
- FL - FLORIDA
- GA - GEORGIA
- HI - HAWAII
- ID - IDAHO

### Employer Liability Limits Amounts

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

#### EMPLOYER LIABILITY LIMITS AMOUNTS

<input type="text"/>	<input type="text"/>	Bodily Injury by Accident-Each Accident *
<input type="text"/>	<input type="text"/>	Bodily Injury by Disease-Policy Limit *
<input type="text"/>	<input type="text"/>	Bodily Injury by Disease-Each Employee *

#### PREMIUM

**Deposit Prem Amount**  **Policy Est Std Prem Total \***  **Policy Min Prem Amount \***  **Min Prem State Code \***

### 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.

**INSURED NAMES** ✔ Indicates Primary Name

Show  entries Search:

Insured Name	FEIN	Name Link ID	Cont. Seq. #	PEO Indicator	Change Effective Date	Change Expiration Date
No data available in table						

Showing 0 to 0 of 0 entries Previous Next

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.

**ADD INSURED NAME**

Insured Name \*  Federal Employer ID Number (FEIN)

PEO or Client Company Code  Primary Name

Change Effective Date \*  Change Expiration Date \*

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.

**INSURED NAMES** ✔ Indicates Primary Name

Show  entries Search:

	Insured Name	FEIN	Name Link ID	Cont. Seq. #	PEO Indicator	Change Effective Date	Change Expiration Date
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	TEST COMPANY		002	001			
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	TEST COMPANY AFFILIATE		003	001			

Showing 1 to 2 of 2 entries Previous **1** Next

**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
<a href="#">Edit</a> <a href="#">Delete</a>	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

Foreign Address Code

Name Link \*

Street Address \*

City \*

State Code \*

Zip Code \*

Wrap-up Project Name/Location \*

Geographic Area \*

Country Code \*

Change Effective Date \*

Change Expiration Date \*

[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.

ADD PREMIUM



Experience Modification Status: 1 - Final Modification Factor Fc

Anniversary Rating Date: mm/dd/yyyy

Experience Modification Factor: ---

Est. State Std. Prem. Total: \$

Expense Constant: \$

Premium Discount: \$

Experience Mod. Effective Date: mm/dd/yyyy

DCO Risk ID:

ARAP: 1

Other Ind. Risk Rating: 1

Insurer Prem. Deviation: 1

Type of Prem. Deviation Code:

Premium Adjustment Period Code:

Reason State was added to the Policy Code: 0 - Field Does Not Apply

Change Effective Date: mm/dd/yyyy

Change Expiration Date: mm/dd/yyyy

Reset Save Save and New Cancel

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
<a href="#">Edit</a> <a href="#">Delete</a>	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.

ADD EXPOSURE



Classification Code:

Class Code Description:

Est. Exposure Amount: \$

Manual/Charged Rate:

Est. Premium Amount: \$

Expo Act/Expo Coverage Code:

Exposure Period Eff. Date: mm/dd/yyyy

Change Effective Date: mm/dd/yyyy

Change Expiration Date: mm/dd/yyyy

Reset Save Save and New Cancel

## 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.

**Endorsement List**

Search:

Endorsement Number	Endorsement Name	Effective Date	Expiration Date
<input type="checkbox"/> WC000000	Policy Declaration Page Endorsement		01/01/2015
<input type="checkbox"/> WC000000A	Policy Declaration Page Endorsement		
<input type="checkbox"/> WC000000B	Policy Declaration Page Endorsement		
<input type="checkbox"/> WC000000C	Policy Declaration Page Endorsement	01/01/2015	
<input type="checkbox"/> WC000001	Policy Jacket Endorsement		
<input checked="" type="checkbox"/> WC000001A	Policy Jacket Endorsement		
<input type="checkbox"/> WC000001B	Policy Jacket Endorsement	01/01/2015	

**Endorsement Effective Date**

mm/dd/yyyy

< Jun 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

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.

**WC000101A - DEFENSE BASE ACT COVERAGE**

Work Description

## 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.

### QUICK LINKS

#### NTC LETTERS

Letter ID
No data available in table



#### CPAP EFF DATES

Effective Date
No data available in table

#### INSPECTION DATES

Inspection Date
No data available in table

## 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.

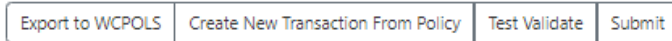


## Validating

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.

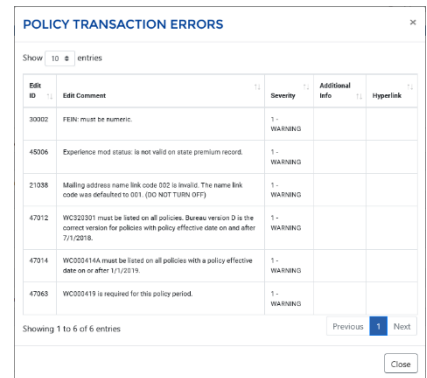
To validate the transaction prior to submitting, select the Test Validate button at the top left corner of the saved policy transaction.

### VIEW TRANSACTION INFORMATION



## 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.



Edit ID	Edit Comment	Severity	Additional Info	Hyperlink
30002	FEN must be numeric.	1 - WARNING		
45006	Experience mod status: is not valid on state premium record.	1 - WARNING		
21338	Mailing address name link code 002 is invalid. The name link code was defaulted to 001. (DO NOT TURN OFF)	1 - WARNING		
47912	WC020201 must be listed on all policies. Bureau version 0 is the correct version for policies with policy effective date on and after 7/1/2018.	1 - WARNING		
47914	WC02014A must be listed on all policies with a policy effective date on or after 1/1/2019.	1 - WARNING		
47963	WC020419 is required for this policy period.	1 - WARNING		

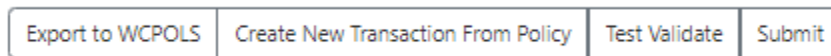
Showing 1 to 6 of 6 entries

Previous 1 Next

Close

## 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.

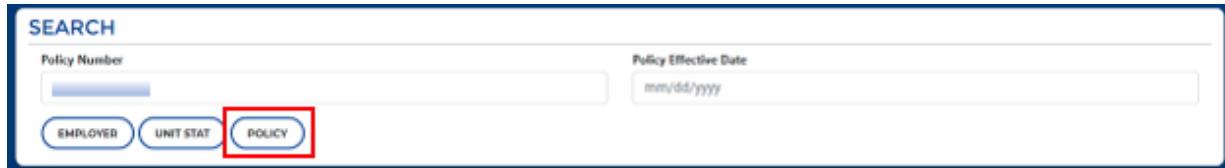
## Icons:

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

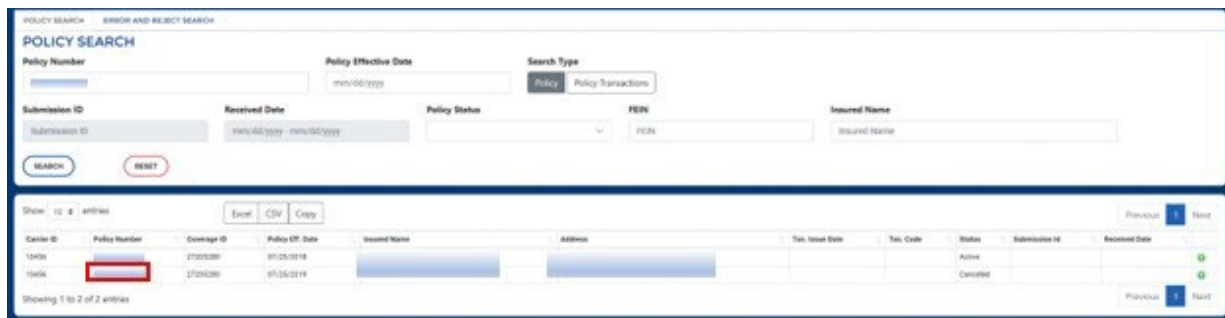
To create a Policy Change Transaction, first locate the shell of the Policy.

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



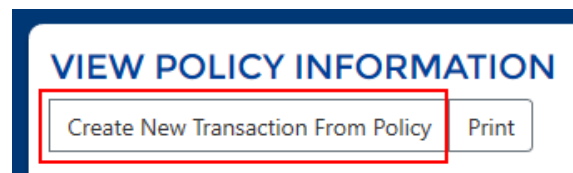
The screenshot shows a search interface with a 'SEARCH' header. Below the header, there are two input fields: 'Policy Number' and 'Policy Effective Date'. Below these fields are three buttons: 'EMPLOYER', 'UNIT STAT', and 'POLICY'. The 'POLICY' button is highlighted with a red rectangle.

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



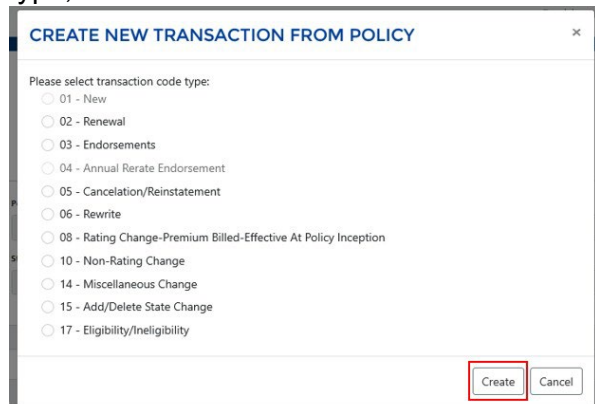
The screenshot shows the 'POLICY SEARCH' results page. At the top, there are search filters for 'Policy Number', 'Policy Effective Date', and 'Search Type'. Below the filters is a table of search results. The first row of the table has a red box around the 'Policy Number' column. The table has columns for 'Carrier ID', 'Policy Number', 'Coverage ID', 'Policy Eff. Date', 'Insured Name', 'Address', 'Tax Issue Date', 'Tax Code', 'Status', 'Submission ID', and 'Received Date'. The first row shows a policy with a red box around the 'Policy Number' field.

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



The screenshot shows the 'VIEW POLICY INFORMATION' screen. At the top, there is a header 'VIEW POLICY INFORMATION'. Below the header, there are two buttons: 'Create New Transaction From Policy' and 'Print'. The 'Create New Transaction From Policy' button is highlighted with a red rectangle.

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



The screenshot shows a dialog box titled 'CREATE NEW TRANSACTION FROM POLICY'. The dialog box contains a list of transaction code types with radio buttons next to each. The 'Create' button is highlighted with a red rectangle.

Please select transaction code type:

- 01 - New
- 02 - Renewal
- 03 - Endorsements
- 04 - Annual Rerate Endorsement
- 05 - Cancellation/Reinstatement
- 06 - Rewrite
- 08 - Rating Change-Premium Billed-Effective At Policy Inception
- 10 - Non-Rating Change
- 14 - Miscellaneous Change
- 15 - Add/Delete State Change
- 17 - Eligibility/Ineligibility

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

## 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.

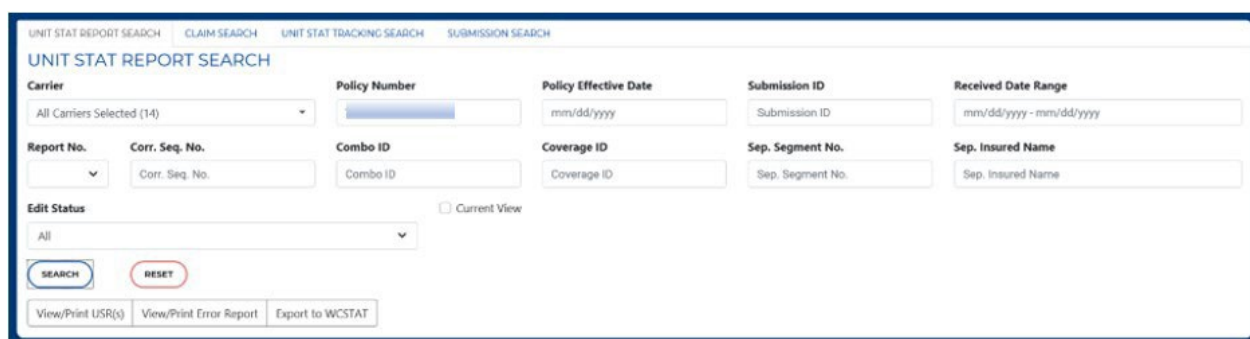
Below are steps to common procedures as it relates to unit statistical reports.

### 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.

Show 10 entries    Excel   CSV   Copy    Previous 1 Next

Carrier ID	Policy Number	Policy Effective Date	Insured Name	Rpt. No.	Corr. Seq. No.	Corr. Type	Combo ID	Coverage ID	Submission ID	View Letters	Sep. Segment No.	Received Date	Due/Followup Date	Status	Status Date	Web Status
16594		08/31/2020		01	00		970065653	0490566	202203250007	3		03/25/2022		Rejected	03/27/2022	Submitted

Showing 1 to 1 of 1 entries    Previous 1 Next

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.

VIEW UNIT STAT REPORT

Export to WCSTAT   Export to Excel   Add to WCSTAT Queue   Print   Error Report   Replace   To Policy    Add to MyList   Delete   Revise   Save   Cancel

**Header**    7

Exposures    12

Loss Info    3

Validation Runs

**HEADER**  
POLICY INFO

Received Date: 03/25/2022    Accepted Date:    Edit Status: Rejected    Submission ID: 202203250007    Report No. \*: 01

Carrier ID: 16594 (DCO) - 16594 (NCC)    Policy No. \*:    Policy Eff. Date \*: 08/31/2020    Correction Type:    Corr. Seq. No. \*: 00    Replacement Ind.: R

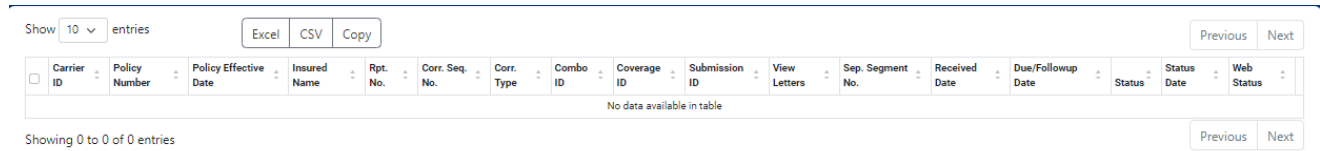
Combo ID:    Coverage ID:    Policy Exp. Date: 08/31/2021    Exposure State \*: 48    State Eff. Date:

Risk ID Number:

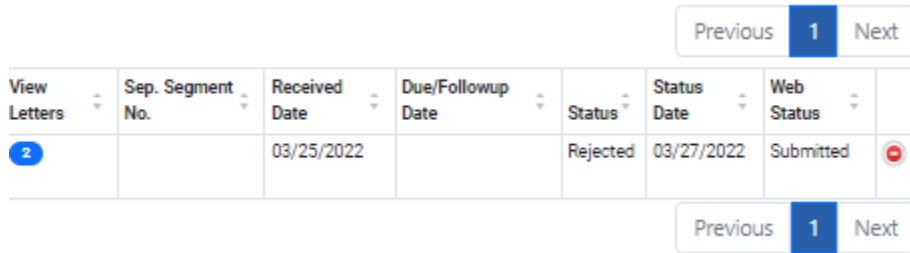
Insured's Name:



Address:

**\*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.

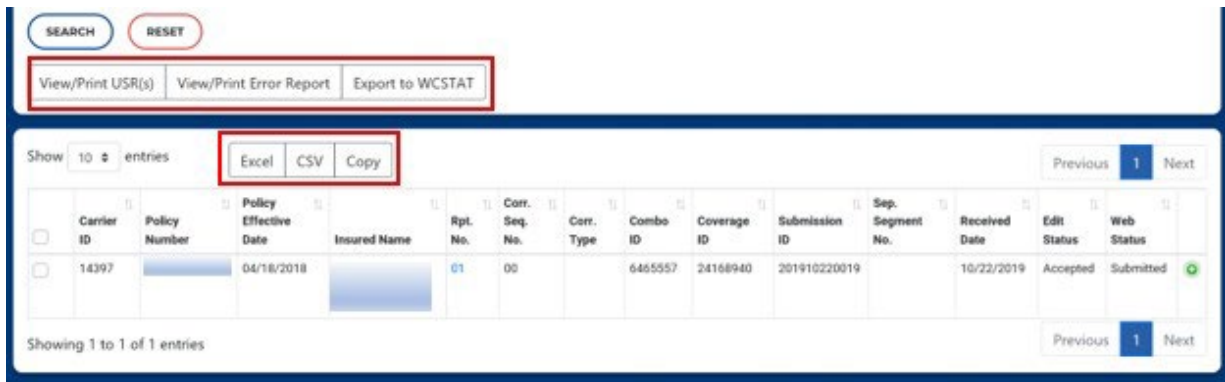


Located toward the right side of the results grid is a column for Status. All unit stat reports for the policy and the status of each report are located there.



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.

UNIT STAT REPORT SEARCH CLAIM SEARCH UNIT STAT TRACKING SEARCH SUBMISSION SEARCH

**CLAIM SEARCH**

Carrier: No Carriers Selected

Claim No.: Claim No.

Policy Number: Policy Number

Policy Effective Date Range: mm/dd/yyyy - mm/dd/yyyy

SEARCH RESET

View/Print Error Report

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. Seq. No.	Combo ID	Coverage ID	Submission ID	Upd. Type	Class	Inj. Type	Accid. Date	Claim Count	Claim Stat.	Inc. Ind.	Inc. Med.	Pa. Inv.
10448	<a href="#">10448</a>	08/01/2017	<a href="#">01</a>	00				9382624	12902490	201902140012	R	8111	05	08/24/2017	1	0	1200	4250	0
10448	<a href="#">10448</a>	08/01/2017	<a href="#">02</a>	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. Seq. 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.	
<a href="#">10448</a>	08/01/2017	<a href="#">01</a>	00				9382624	12902490	201902140012	R	8111	05	08/24/2017	1	0	1200	4250	0	926	
<a href="#">10448</a>	08/01/2017	<a href="#">02</a>	00				9382624	12902490	202002130009	P	8111	05	08/24/2017	1	0	2500	1500	1000	926	

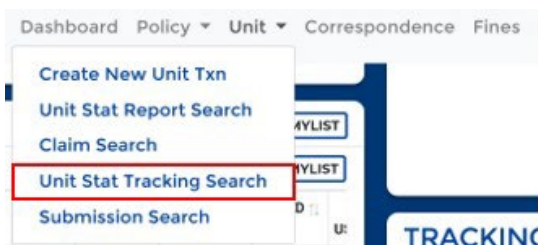
On the right of the grid there are icons on each row  or  which add or delete the transaction from the My List Widget on the dashboard.

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.

A screenshot of the 'UNIT STAT TRACKING SEARCH' form. The form has a header with four tabs: 'UNIT STAT REPORT SEARCH', 'CLAIM SEARCH', 'UNIT STAT TRACKING SEARCH' (which is active), and 'SUBMISSION SEARCH'. Below the tabs, there is a heading 'UNIT STAT TRACKING SEARCH' and a note: 'For rejected USRs, please use the Unit Stat Report Search'. The form contains several input fields: 'Carrier' (a dropdown menu with 'All Carriers Selected (575)' selected), 'Policy Number' (a text input field), 'Policy Eff. Date Begin/End' (a date range input field with the format 'mm/dd/yyyy - mm/dd/yyyy'), 'Due Status' (a dropdown menu with 'All' selected), and 'Due Follow-up Date' (a date input field with the format 'mm/dd/yyyy - mm/dd/yyyy'). At the bottom of the form, there are three buttons: 'SEARCH', 'RESET', and 'View/Print Error Report'. The 'SEARCH' and 'RESET' buttons are circled in red.

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.

**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.

Carrier ID	Policy Number	Policy Effective Date	Policy Expiration Date	Insured Name	Rpt. No.	Coverage ID	Due Status	Due Date
10456		07/17/2019	07/17/2020		01	26923040	EXPECTED	03/31/2021
10456		07/17/2020	07/17/2021		01	26923040	EXPECTED	03/31/2022

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.

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

Show 10 entries Excel CSV Copy



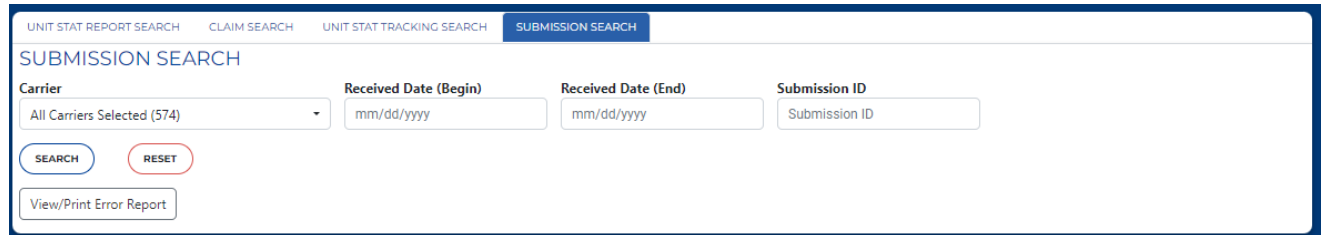
## How to Search for a Submission

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.

A screenshot of the 'SUBMISSION SEARCH' form. At the top, there are four tabs: 'UNIT STAT REPORT SEARCH', 'CLAIM SEARCH', 'UNIT STAT TRACKING SEARCH', and 'SUBMISSION SEARCH'. The 'SUBMISSION SEARCH' tab is active. Below the tabs, there are four input fields: 'Carrier' (a dropdown menu showing 'All Carriers Selected (574)'), 'Received Date (Begin)' (a date input field with a placeholder 'mm/dd/yyyy'), 'Received Date (End)' (a date input field with a placeholder 'mm/dd/yyyy'), and 'Submission ID' (a text input field with a placeholder 'Submission ID'). Below these fields are 'SEARCH' and 'RESET' buttons, and a 'View/Print Error Report' button.

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

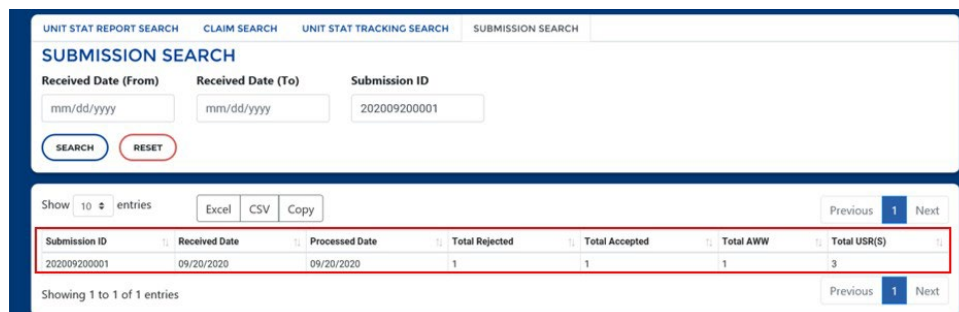
**Carrier:** Select a carrier to narrow the search.

**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.

A screenshot of the 'SUBMISSION SEARCH' results page. The search criteria are: 'Received Date (From)' is 'mm/dd/yyyy', 'Received Date (To)' is 'mm/dd/yyyy', and 'Submission ID' is '202009200001'. Below the search criteria are 'SEARCH' and 'RESET' buttons. The results are displayed in a table with the following columns: 'Submission ID', 'Received Date', 'Processed Date', 'Total Rejected', 'Total Accepted', 'Total AWW', and 'Total USR(S)'. The table shows one entry for Submission ID '202009200001' with Received Date '09/20/2020', Processed Date '09/20/2020', Total Rejected '1', Total Accepted '1', Total AWW '1', and Total USR(S) '3'. Below the table, it says 'Showing 1 to 1 of 1 entries'. There are also 'Excel', 'CSV', and 'Copy' buttons, and 'Previous' and 'Next' navigation buttons.

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

The screenshot displays the 'SUBMISSION SEARCH' interface. At the top, there are navigation tabs: 'UNIT STAT REPORT SEARCH', 'CLAIM SEARCH', 'UNIT STAT TRACKING SEARCH', and 'SUBMISSION SEARCH' (which is active). Below the tabs, the search criteria are: 'Carrier' (set to 'All Carriers Selected (574)'), 'Received Date (Begin)' (01/01/2022), 'Received Date (End)' (09/02/2022), and 'Submission ID' (empty). There are 'SEARCH' and 'RESET' buttons, and a 'View/Print Error Report' link.

Below the search filters, there is a table of results. The table has columns: Carrier, Submission ID, Insured Name, Received Date, Processed Date, Total Rejected, Total Accepted, Total Flagged, Total USR(S), Status, and a 'View USR' link. The table shows 10 entries, all with a status of 'PROCESSED'. The first row shows a carrier with 15 total accepted submissions and 15 total USR(S). The other rows show 1 total accepted submission and 1 total USR(S) each.

Carrier	Submission ID	Insured Name	Received Date	Processed Date	Total Rejected	Total Accepted	Total Flagged	Total USR(S)	Status	View USR
158		E INC	01/03/2022	01/03/2022	0	15	0	15	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	10	0	10	PROCESSED	View USR
158		S LLC	01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR
158			01/03/2022	01/03/2022	0	1	0	1	PROCESSED	View USR

Showing 1 to 10 of 1,000 entries

## 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](mailto: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.

Header

Exposures 0

Loss Info 0

**\*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.

#### HEADER POLICY INFO

Carrier ID *	Policy No. *	Report No. *	Corr. Seq. No. *
<input type="text"/>	<input type="text"/>	<input type="text" value="01"/>	<input type="text" value="00"/>
Policy Eff. Date *	Policy Exp. Date	Exposure State *	State Eff. Date
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="48"/>	<input type="text" value="mm/dd/yyyy"/>
Risk ID Number	<input type="text"/>		
Insured's Name	<input type="text"/>		
Address	<input type="text"/>		

### Policy Conditions

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

#### POLICY CONDITIONS

3 yr. F/R Policy	Multi State Policy	Interstate Policy	Estimated Audit Code
<input type="text" value="N - No"/>	<input type="text" value="N - No"/>	<input type="text" value="N - No"/>	<input type="text" value="N - No"/>
Retro Policy	Canceled Mid-term	MCO Indicator	
<input type="text" value="N - No"/>	<input type="text" value="N - No"/>	<input type="text" value="N - No"/>	

### Policy Type ID

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

#### POLICY TYPE ID

Type Coverage	Plan Indicator	Non-Standard Indicator *
<input type="text" value="01 - Standard Work"/>	<input type="text" value="01 - Voluntary Polic"/>	<input type="text" value="01 - Non-Standard Code Does Nc"/>
Amt Per Claim/Acc	Aggregate Amount	Percent
<input type="text"/>	<input type="text"/>	<input type="text" value="00"/>

## Previous Fields

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

### PREVIOUS FIELDS

Carrier ID	Policy No.	Policy Eff. Date
<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>

## Exposure Record:

### 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.

### EXPOSURE

### SPLITS

							Add Split	Add Expo	Calculate
Split Indicator	Mod. Eff. Date	Rate Eff. Date	Total Exposure	Subject Premium	Exp. Mod	Modified Premium			
No data available in table									

### EXPOSURE TOTALS

Subject Premium	Standard Exposure	Standard Premium
<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

#### ADD EXPO

Split Ind. *	Class Category *			
<input type="text" value="0"/>	<input type="text" value="Subject to Mod"/>			
Update Type *	Mod Eff. Date *	Rate Eff. Date *	Exp. Mod.	Expo. Act *
<input type="text" value="R - Revised"/>	<input type="text" value="06/12/2019"/>	<input type="text" value="06/12/2109"/>	<input type="text" value="00.000"/>	<input type="text" value="00 - Statistical Coc"/>
Class *	Exposure	Manual Rate	Premium Amt. *	
<input type="text" value="8810"/>	<input type="text"/>	<input type="text" value="0000.000"/>	<input type="text" value="1500"/>	

#### ADD SPLIT

Split Ind. *	Mod Eff. Date *	Rate Eff. Date *	Exp. Mod.
<input type="text" value="0"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="00.000"/>

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.

**EXPOSURE SPLITS**

Splits Indicator		Subject Premium		Modified Premium	
0					
<b>SUBJECT TO MOD</b>					
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Amt	Premium Amt.
8	06/12/2019	06/12/2019		0.00	1000
<a href="#">Edit</a>	<a href="#">Delete</a>				
<b>NOT SUBJECT TO MOD</b>					
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Amt	Premium Amt.
8	06/12/2019	06/12/2019		0.00	1298
<a href="#">Edit</a>	<a href="#">Delete</a>				
<b>NON STANDARD</b>					
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Amt	Premium Amt.
No data available in table					

[Add Expo](#)

**EXPOSURE SPLITS**

Splits Indicator		Subject Premium		Modified Premium	
0					
<b>SUBJECT TO MOD</b>					
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Amt	Premium Amt.
8	06/12/2019	06/12/2019		0.00	1000
<a href="#">Edit</a>	<a href="#">Delete</a>				
<b>NOT SUBJECT TO MOD</b>					
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Amt	Premium Amt.
8	06/12/2019	06/12/2019		0.00	1298
<a href="#">Edit</a>	<a href="#">Delete</a>				
<b>NON STANDARD</b>					
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Amt	Premium Amt.
No data available in table					

[Add Expo](#)

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:** this is not a required section. Ensure values are entered correctly to prevent additional follow-up.

**EXPOSURE TOTALS**

<b>Subject Premium</b>	<b>Standard Exposure</b>	<b>Standard Premium</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

## LOSS INFO

Show 10 entries

Search:

Update Type	Claim Number	Accident Date	No. Of Claims	Incurred Indemnity	Incurred Medical	Class	Type of Injury	Claim Status
No data available in table								

Showing 0 to 0 of 0 entries

Previous Next

Add Claim

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

## ADD CLAIM

×

Update Type R - Revised	Claim Number <input type="text"/>	Accident Date 09/02/2019	No. of Claims 1	Incurred Indemnity <input type="text"/>
Incurred Medical 523.44	Class 8810	Type of Injury 05 - Temporary Inj	Claim Status 1 - Closed	

## LOSS CONDITIONS

Loss Act 01 - State Act	Loss Type 01 - Trauma	Recovery 01 - No Recovery	Claim Type 01 - Worker's Com	Settlement 00 - Claim not sub	Jurisdiction State <input type="text"/>
Catastrophe Code 00	MCO Type 00 - Not Approvec	Injury Part 35 - Hand	Injury Nature 40 - Laceration	Injury Cause 16 - Hand Tool, Ut	Voc. Reh. Ind. N - CLAIM DOES
Occupation Description <input type="text"/>	Lump <input type="text"/>	Fraud Claim Ind. 00 - Not Frauduler	Deduct. Ind. <input type="text"/>	Paid Indemnity <input type="text"/>	
Paid Medical 523.44	Claimant Att. Fees <input type="text"/>	Emp. Att. Fees <input type="text"/>	ALAE Paid <input type="text"/>	ALAE Incurred <input type="text"/>	

Reset Save 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 INFO

Show 10 entries

Search:

Update Type	Claim Number	Accident Date	No. Of Claims	Incurred Indemnity	Incurred Medical	Class	Type of Injury	Claim Status
<a href="#">Edit</a> <a href="#">Delete</a>	R	WC12345A	09/02/2019	1	523.44	8810	05	1 - null

Showing 1 to 1 of 1 entries

Previous 1 Next

Add Claim

## 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.

## LOSS TOTAL

<b>No. of Claims</b>	<b>Incurred Indemnity</b>	<b>Incurred Medical</b>	<b>Paid Indemnity</b>	<b>Paid Medical</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>ALAE Paid</b>	<b>ALAE Incurred</b>			
<input type="text"/>	<input type="text"/>			

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.

### **Validate**

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.

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

### VIEW UNIT STAT REPORT

Export to WCSTAT	Export to Excel	Add to WCSTAT Queue	Print	Error Report	<b>Test Validate</b>	Submit
------------------	-----------------	---------------------	-------	--------------	----------------------	--------

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.

### USR EDIT ERRORS

Show 10 entries

Edit ID	Edit Comment	Severity	Record Identifier	Additional Info
699	Carrier ID 10448 is not approved to report USRs directly to NCRB.	4 (Rejection)		
87	Report is too early for policy entered.	2 (Failure)		

Showing 1 to 2 of 2 entries

Previous 1 Next

Close

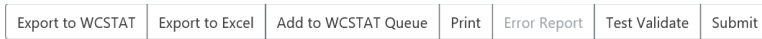
## **Submitting**

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.

### VIEW UNIT STAT REPORT



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.



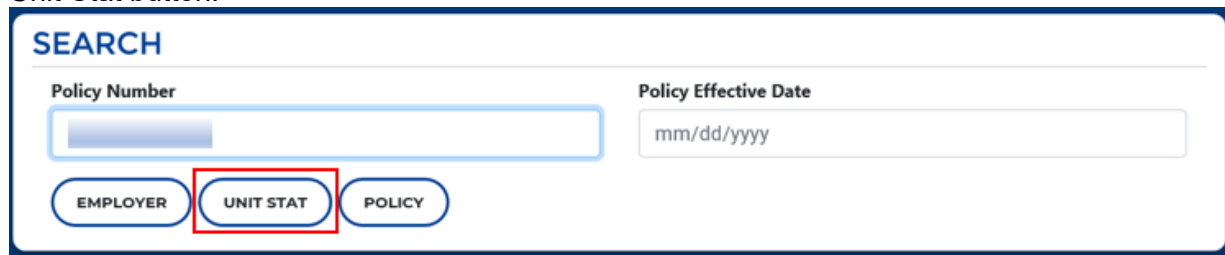
The unit statistical report displays with a copy of the stored unit data and the ability to edit any open fields.

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.

Carrier ID	Policy Number	Policy Effective Date	Insured Name	Rpt. No.	Corr. Seq. No.	Corr. Type	Combo ID	Coverage ID	Submission ID	Sep. Segment No.	Received Date	Edit Status	Web Status
10448		06/02/2017		01	00		6593423	25554410	201812140005		12/14/2018	Accepted	Submitted
10448		06/02/2018		01	00		6593423	25554410	201912120014		12/12/2019	Accepted	Submitted

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

### VIEW UNIT STAT REPORT

Export to WCSTAT	Export to Excel	Add to WCSTAT Queue	Print	Error Report	Create Correction	<b>Create Subsequent</b>	Create Separated
------------------	-----------------	---------------------	-------	--------------	-------------------	--------------------------	------------------

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.

### CREATE SUBSEQUENT

#### SELECT LOSSES TO COPY

Show 10 entries

Search:

<input checked="" type="checkbox"/>	Update Type	Claim Number	Accident Date	No. Of Claims	Incurred Indemnity	Incurred Medical	Class	Type of Injury	Claim Status
No data available in table									

Showing 0 to 0 of 0 entries

Previous Next

**Create** Cancel

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

Policy Number

Policy Effective Date

**EMPLOYER** **UNIT STAT** **POLICY**

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.

Carrier ID	Policy Number	Policy Effective Date	Insured Name	Rpt. No.	Corr. Seq. No.	Corr. Type	Combo ID	Coverage ID	Submission ID	Sep. Segment No.	Received Date	Edit Status	Web Status
10448		06/02/2017		01	00		6593423	25554410	201812140005		12/14/2018	Accepted	Submitted
10448		06/02/2018		01	00		6593423	25554410	201912120014		12/12/2019	Accepted	Submitted

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.

### VIEW UNIT STAT REPORT

Export to WCSTAT	Export to Excel	Add to WCSTAT Queue	Print	Error Report	Create Correction	Create Subsequent	<b>Create Separated</b>
------------------	-----------------	---------------------	-------	--------------	-------------------	-------------------	-------------------------

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.

**HEADER**  
POLICY INFO

Carrier ID *	Policy No. *	Report No. *	Corr. Seq. No. *	Correction Type	Replacement Ind.
10448		01	00		
Policy Eff. Date *	Policy Exp. Date	Exposure State *	State Eff. Date		
06/12/2017	06/12/2018	32	mm/dd/yyyy		
Risk ID Number					
Insured's Name					
Address					

**POLICY CONDITIONS**

<input type="checkbox"/> 3 yr. F/R Policy	<input type="checkbox"/> Multi State Policy	<input type="checkbox"/> Interstate Policy	Estimated Audit Code
<input type="checkbox"/> Retro Policy	<input type="checkbox"/> Canceled Mid-term	<input type="checkbox"/> MCO Indicator	U - Uncooperative

**POLICY TYPE ID**

Type Coverage	Plan Indicator	Non Standard Indicator *	
01 - Standard	01 - Voluntary	01 - Non-standard Code does not apply	
Lesses Subject to Deductible	Det. Amt. Claim/Accident	Det. Amt. Aggregate	Basis of Deductible Calculation
00 - No Deductible	0	0	00 - No Deductible Applies

## 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.

### EXPOSURE SPLITS

Split Indicator	Subject Premium	Modified Premium
0	92	0

SUBJECT TO MOD									
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt.	
R	06/12/2017	06/12/2017	0	01	8832	42000	0.220	92	

NOT SUBJECT TO MOD									
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt.	
No data available in table									

NON STANDARD									
Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt.	
R	06/12/2017	06/12/2017	0	01	0900	0	0	250	
R	06/12/2017	06/12/2017	0	01	9740	0	0	4	
R	06/12/2017	06/12/2017	0	01	9741	0	0	4	
R	06/12/2017	06/12/2017	0	01	9757	0	0.250	89	

Add Expo

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.

Update Type	Mod Eff. Date	Rate Eff. Date	Exp. Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt.
R	06/12/2017	06/12/2017	0	01	8832	42000	0.220	92

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.

### EDIT EXPOSURE

Split Ind. *	Class Category *				
0	Subject to Mod				
Update Type *	Mod Eff. Date *	Rate Eff. Date *	Exp. Mod.	Expo. Act *	
R - Revised	06/12/2017	06/12/2017	0	01 - State Act or F	
Class *	Exposure	Manual Rate	Premium Amt. *		
8832	20000	0.22	92		

Reset Save Cancel

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.

#### EXPOSURE TOTALS

Subject Premium	Standard Exposure	Standard Premium	Modified Premium
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### **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.

#### LOSS TOTAL

No. of Claims	Incurred Indemnity	Incurred Medical	Paid Indemnity	Paid Medical	Claim Attor. Fees
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Emp. Attor. Fees	ALAE Paid	ALAE Incurred			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

### **Separated Data Record:**

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

#### SEPARATED DATA

Separated Segment Number *	Separated Date *	Separated Insured Name *	Previous Separated Segment Number
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>	<input type="text"/>

**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

The screenshot shows the 'USR CORRESPONDENCE SEARCH' interface. It features a top navigation bar with 'USR SEARCH' and 'NTC SEARCH' tabs. Below the navigation bar, the search criteria are organized into several sections: 'Carrier' (a dropdown menu currently showing 'All Carriers Selected (574)'), 'Correspondence ID' (a text input field), 'USR Status' (a dropdown menu with 'Click to select...' as the placeholder), and 'Correspondence Type' (a dropdown menu). Below these are 'Policy Number' (text input) and 'Status Date Range' (text input with a date format 'mm/dd/yyyy - mm/dd/yyyy'). Further down are 'Combo ID' and 'Coverage ID' (both text input fields). At the bottom of the search area are two buttons: 'SEARCH' and 'RESET'.

Search for all correspondence from the Wisconsin Compensation Rating Bureau via the correspondence tab on the navigation menu.

Dashboard Policy ▾ Unit ▾ **Correspondence** Fines Back to Portal

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 is entered, the search will display results in a sortable grid.

USR SEARCH    NTC SEARCH

### USR CORRESPONDENCE SEARCH

**Carrier**: All Carriers Selected (575)   
**Correspondence ID**: Correspondence ID   
**USR Status**: Click to select...   
**Correspondence Type**:

**Policy Number**: Policy Number   
**Status Date Range**: 06/15/2023 - 07/14/2023

**Combo ID**: Combo ID   
**Coverage ID**: Coverage ID

SEARCH    RESET

---

Show 10 entries    Excel    CSV    Copy    Previous 1 2 3 4 5 ... 32 Next

	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	0016679	1000003173	USR   01 - 01	
	991020956156	USR ESTIMATED	07/14/2023	Accepted		11193	0016679	1000003173	USR   01 - 01	
	991020969792	USR ESTIMATED	07/14/2023	Accepted		11193	0016679	1000003173	USR   01 - 01	
	991020983392	USR ESTIMATED	07/14/2023	Accepted		11193	0016679	1000003173	USR   01 - 01	
	991020996203	USR ESTIMATED	07/14/2023	Accepted		11193	0016679	1000003173	USR   01 - 01	
	991020999569	USR ESTIMATED	07/14/2023	Accepted		11193	0016679	1000003173	USR   01 - 02	
	991020783928	USR REJECT	06/22/2023	Accepted		10863	0337773	WC930560718	USR   01 - 00	
	991020789047	USR ESTIMATED	06/22/2023	Accepted		10863	0337773	WC930560718	USR   01 - 00	
	991020812959	USR ESTIMATED	06/22/2023	Accepted		10863	0337773	WC930560718	USR   01 - 00	
	991020998570	USR REJECT	06/21/2023	Rejected		16144		10172361048761	USR   08 - 00	

Showing 1 to 10 of 318 entries    Previous 1 2 3 4 5 ... 32 Next

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.

Show 10 entries    Excel    CSV    Copy    Previous 1 2 3

	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.

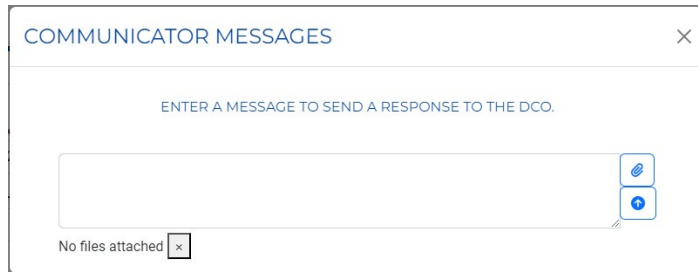
## View and Respond to USR Letters


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.


Dashboard ▾ Policy ▾ Unit ▾ Correspondence ▾

- USR Search
- NTC Search

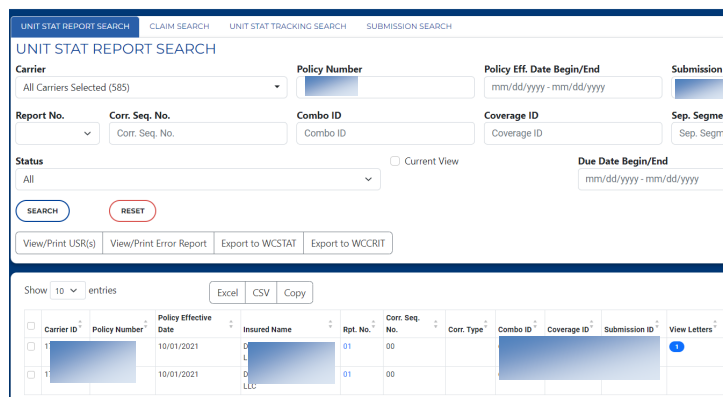
Use the PDF icon  on the left to view a printable version of the USR letter. Use the dialogue icon on the right  to enter a response.



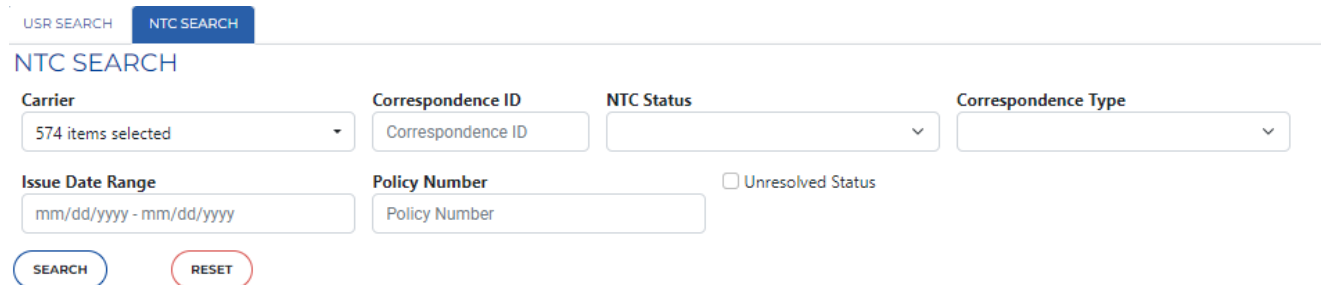
Type a message into the blank box. Use the up-arrow button  to send the response.

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

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

**NTC Status:** Narrow down by status, such as Unanswered Fined, or Advisory.

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

**Issue Date Range:** Add a date range to find all correspondence that occurred during that time.

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



**Unresolved Status checkbox:** 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.

The screenshot shows the 'NTC SEARCH' interface. At the top, there are tabs for 'USR SEARCH' and 'NTC SEARCH'. Below this, search filters include:
 

- Carrier:** A dropdown menu showing '575 items selected'.
- Correspondence ID:** A text input field with 'Correspondence ID' as a placeholder.
- NTC Status:** A dropdown menu set to 'Under DCO Review'.
- Correspondence Type:** A dropdown menu set to 'Mandatory'.
- Issue Date Range:** A date range selector showing '06/15/2023 - 07/14/2023'.
- Coverage ID:** A text input field with 'Coverage ID' as a placeholder.
- Policy Number:** A text input field with 'Policy Number' as a placeholder.
- Unresolved Status:** An unchecked checkbox.

 Below the filters are 'SEARCH' and 'RESET' buttons. The results section shows a table with columns: Carrier ID, Policy Eff. Date, NTC ID, Original Issue Date, Times Fined, Next Fine Date, NTC Status, Stopped Date, Last Comment Submitted, and Policy Link. The table contains 7 rows of data, all with 'Open/Not Fined' status. To the right of the table are 'Previous', '1', and 'Next' navigation buttons. Below the table, it says 'Showing 1 to 7 of 7 entries'.

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.

**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**

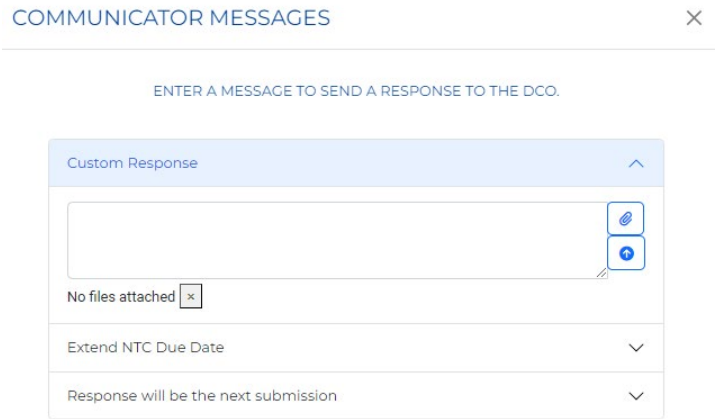
When there is an NTC, they can click on the hyperlinked NTC ID to navigate to the notice. At the bottom of the notice are two buttons that allow a Reply or Print.



The screenshot shows a 'NOTICE TO CARRIER' document. The header includes 'IMPORTANT - REPLY AT ONCE TO:' and 'Wisconsin Compensation Rating Bureau'. The document contains fields for 'Notice Issuance Date' (06/16/23), 'DUE DATE - PENALTY AFTER THIS DATE', 'Policy Effective Date' (06/17/23), and 'Policy Number' (17124). At the bottom, there are 'REPLY' and 'PRINT' buttons. The footer includes the text 'THIS NOTICE FOR INFORMATIONAL PURPOSES ONLY' and 'Letter ID: 99102097529'.

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	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](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:  

**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.

**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