

March 20, 2018

CIRCULAR LETTER TO ALL MEMBER COMPANIES

**Attention: WC Data Reporting
Personnel & Invoice Contacts**

**Re: Workers Compensation Insurance
ManagePolicy Carrier Improvements**

The North Carolina Rate Bureau is pleased to introduce an enhanced version of the ManagePolicy web application on April 5, 2018. This new version of ManagePolicy focuses on carrier improvements including consolidation of fine reports and error reports. The attached document will assist you with maneuvering through the report changes.

The three fine reports (Rejected Transaction Fines Report (PT40); Late Policies, Cancellations or Reinstatement Fines Report (PT41) and the Data Error Fines Report (PT42)) are being consolidated to one fine report. The new fine report offers additional search criteria, enhanced grouping by Carrier ID and by Fine Type (Data Errors, Rejected, Late/Cancellation/Reinstatement), and a method to trace an invoice to a specific fine using an invoice's 'Item Number' (DQ1, DQ2, DQ3). Email notifications will continue to be sent on the 8th day of the month informing users of fines generated for the prior month.

Similarly, the Error & Rejection Follow-up report (PT39) launched in mid-2015 has been enhanced to consolidate the Error Reports, Underwriting Error Report (PT23) and Data Processing Error Report (PT24) offering a central report for carriers to work from. The Error & Rejection Follow-up report (PT39) will include information previously available on the PT23 and PT24 reports. Users subscribed to the Workers Compensation ManagePolicy Fine, UnitStat Fine and Policy Error Report email notifications will receive the PT39 in place of the PT23 & PT24 after 4/5/18.

Users can subscribe to the email notifications by completing the [Contact Change Request Form](#).

If you have any questions, contact the NCRB Information Center via phone at 919-582-1056 or via email at winfo@ncrb.org.

Sincerely,

Joanna Bililouris

Chief Operating Officer

JB:ko
Attachments
C-18-8

Manage Policy Fine Screen Changes

1. Fine Type- Choose from the three types Late, Reject or Data Error.
 - If you choose not to search by fine type you will be able to view all fines.
 - Viewing all fines will give you the ability to collapse your view by clicking the arrow (A).
2. Item Number- search with your item number DQ1, DQ2 or DQ3 number.
3. Fine reports will show your Carrier ID, Fine types and total amount owed.
4. Data Error, Rejected, and Late will group for your convenience.
5. Fine Status- Status will change when voided, waived or if the fine has been paid.
6. Fine Amount- This will show what is owed for each individual fine.
 - Fine amounts that have a negative are fines that have been waived or voided.



Manage Policy/USR

POLICY
USR
BACK TO PORTAL
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SEARCH
CREATE TRANSACTION
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Fines Report

Each policy transaction with Finable Errors must be resolved within the 2 month period following the month the error was issued. A fine of \$50 per month, per finable error will be assessed until the error is resolved.

Carrier ID:

Policy Effective Date From:

Policy Expiration Date From:

Fine Month:

Fine Type:

Item Number:

To:

To:

Fine Year:

Your search returned 0 record(s)

Carrier ID	Fine Status	Coverage ID	Insured Name	Policy Number	Effective Date	Received Date	T/N Code	Error ID	Error Message	Fine ID	Fine Amount
Carrier ID xxxxx has 3 fine types : Data Error Fine(s), Late Policies, Cancellations or Reinstatement Fine(s), Rejected Fine(s) and grand total fine amount is: \$600											
Item Number for Data Error Fine(s) is xxxxxxxx and the adjusted fine amount (deducting voided/suspended records) is: \$400											
1111	Assessed	225522	CYMA SYSTEMS INC	WCXXXXXX	10/05/2017	07/24/2017	08	47063	WC000419 is required for this policy period.	116527	\$50
1111	Assessed	335544	CYMA SYSTEMS INC	WCXXXXXX	10/05/2017	07/24/2017	08	47012	WC320301 must be listed on all policies. Bureau version C is the correct version for policies with policy effective date on and after 1/1/14.	116526	\$50
1111	Assessed	445599	OXLEY ENTERPRISES	WCXXXXXX	05/11/2016	07/18/2017	15	47014	WC000414 must be listed on all policies.	116438	\$50
1111	Assessed	664577	OXLEY ENTERPRISES	WCXXXXXX	05/11/2016	07/18/2017	15	47063	WC000419 is required for this policy period.	116439	\$50
1111	Assessed	478999	CLOUDCRAZE SOFTWARE LLC	WCXXXXXX	07/01/2016	07/21/2017	15	47063	WC000419 is required for this policy period.	116524	\$50
1111	Assessed	448888	SITE TECH STAFFING INC	WCXXXXXX	11/01/2016	07/22/2017	10	47014	WC000414 must be listed on all policies.	116510	\$50
1111	Assessed	669774	SITE TECH STAFFING INC	WCXXXXXX	11/01/2016	07/22/2017	10	47063	WC000419 is required for this policy period.	116511	\$50
1111	Assessed	113366	SITE TECH STAFFING INC	WCXXXXXX	11/01/2016	07/22/2017	10	47012	WC320301 must be listed on all policies. Bureau version C is the correct version for policies with policy effective date on and after 1/1/14.	116509	\$50
Item Number for Late Policies, Cancellations or Reinstatement Fine(s) is xxxxxxxx and the adjusted fine amount (deducting voided/suspended records) is: \$200											
1111	Issued	564644	CANDIES	WCXXXXXX	01/02/2017	09/14/2017	01			115285	\$50
1111	Issued	654644	BULLDOG FINANCE GROUP LLC	WCXXXXXX	09/05/2016	09/27/2017	05			115317	\$50
1111	Issued	664894	SMART BUSINESS TECHNOLOGY INC		10/01/2016	09/08/2017	05			115216	\$50
1111	Issued	224789	CONFLUENT INC		10/23/2016	09/02/2017	02			115135	\$50

Manage Policy (Error & Rejection Report)

1. Reports- Under policy reports there will be only one viewable report.
2. Error and Rejection Report- shows all errors from the PT23, PT24 and PT39. This report will update within 24 hours when errors have been resolved.

Manage Policy/USR

POLICY USR BACK TO PORTAL NCRB.ORG

SEARCH CREATE TRANSACTION SUBMISSIONS REPORTS MYLIST HELP

Search

1 POLICY REPORTS

ERROR AND REJECTION FOLLOW-UP REPORT **2** dated on 03/11/2018

NONCOMPLIANCE/COMPLIANCE REPORTS

EXPIRED POLICY LISTINGS

FINES REPORT

Policy Search N/C Letter Search

Choose the type of data to retrieve:

- Search Policies and Web Transactions
- Search Transactions
- Search Policies

Txn Code: [dropdown]
Web Status: [dropdown]
Policy Status: [dropdown]

Enter additional filter criteria:

Carrier ID: [text]
Combo ID: [text] Coverage ID: [text]
Insured's FEIN: [text] Policy Number: [text]
Primary Insured's Name: [text]
Policy Effective Date: [dropdown] To: [dropdown]
Policy Expiration Date: [dropdown] To: [dropdown]

Search Clear All

Error & Rejection Report

New Search Criteria

1. Submission ID- New searching criteria Submission ID will pull all errors in that submission.


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Error and Rejection Follow-up Report

This screen displays all policy transactions that contain finable errors and rejections which may be subject to a \$50 fine each month until the error and/or rejection is resolved. If there are any questions, please contact NCRB for assistance.

Carrier ID:

Submission ID: 1

Date Error Occurred From:

To:

Finable:

Type:

Error Message:

Error ID:

Policy Number:

(+ Add to MyList) Your search returned 28 record(s)

<input type="checkbox"/>	Submission ID	Carrier ID	Policy Number	Effective Date	TXN Code	Txn Issue Date	Date Error Occurred	Error ID	Error Message	Finable	Type
<input type="checkbox"/>	Test	11111	WC Test	03/01/2018	08	02/26/2018	03/01/2018	45034	Exp rating indicator is reported as 1-Interstate or 3-Intrastate. However, NCRB has no exp rating. If Interstate please forward a copy of the NCCI exp rating worksheet. If Intrastate please forward a copy of the states Intrastate exp mod.	N	Error
<input type="checkbox"/>	Test	11111	WC Test	05/24/2017	15	02/26/2018	03/01/2018	45034	Exp rating indicator is reported as 1-Interstate or 3-Intrastate. However, NCRB has no exp rating. If Interstate please forward a copy of the NCCI exp rating worksheet. If Intrastate please forward a copy of the states Intrastate exp mod.	N	Error
<input type="checkbox"/>	Test	11111	WC Test	01/16/2018	08	02/26/2018	03/01/2018	45034	Exp rating indicator is reported as 1-Interstate or 3-Intrastate. However, NCRB has no exp rating. If Interstate please forward a copy of the NCCI exp rating worksheet. If Intrastate please forward a copy of the states Intrastate exp mod.	N	Error
<input type="checkbox"/>	Test	11111	WC Test	04/01/2017	05	02/27/2018	03/01/2018	48021	Multiple 05 transactions are submitted with the same Transaction Issue Date for the same policy, but none have Transaction Sequence Number of '01'.	Y	Reject
<input type="checkbox"/>	Test	11111	WC Test	04/01/2017	05	02/27/2018	03/01/2018	48021	Multiple 05 transactions are submitted with the same Transaction Issue Date for the same policy, but none have Transaction Sequence Number of '01'.	Y	Reject