October 18, 2010

CIRCULAR LETTER TO ALL MEMBER COMPANIES

Re: Workers Compensation Insurance

ManagePolicy 2.0 Training Announcement

The North Carolina Rate Bureau is pleased to announce the upcoming release of ManagePolicy 2.0. This new version of the ManagePolicy application provides users with powerful new features to assist with managing and correcting policy data reporting or coverage issues. ManagePolicy 2.0 is expected to be available for use on approximately November 1, 2010.

In addition to the ability to view policy data, submission status, submission data and error reports, the ManagePolicy 2.0 system provides the following new features:

1. Creation of WCPOLS transactions.

2. Submission of ManagePolicy transactions for DCO processing.

3. Download of ManagePolicy transactions to WCPOLS files for import into other systems.

4. Improved tools to manage errors such as viewing errors across multiple submissions and checking error resolution status.

The application does not allow you to make changes to a policy directly. Changes must be made by creating and submitting *transactions* that are specifically defined for certain types of changes. The general procedure for creating or modifying a policy is as follows:

1. Create a transaction that either creates a new policy, or create one or more transactions that make the desired modifications to an existing policy (either directly or through policy replacement).

2. Submit the transaction(s) for DCO processing. Transactions are submitted in a special data file called a Submission File (WCPOLS file).

3. Check the status of the Submission to determine if errors occurred in the submission.

If errors occur in the submission, you can create a transaction that corrects the errors and resubmit the transaction. The final result will be the successful processing of one or more transactions and the policy creation or modification is accomplished.

In ManagePolicy 2.0, three user roles are available to end users. The roles are as follows:

- Read-only- Users with this permission can view policy data, submissions and error reports but cannot create, modify, delete or submit transactions.
- Author only – Users with this permission can view policy data, submissions and error reports. They can create, modify, delete and submit transactions they created. They can view transactions that other users within their carrier group created but cannot modify, delete or submit other users' transactions.
- Edit Access- Users with this permission can view policy data, submissions and error reports. They can create, modify, delete and submit any transaction that was created by a user within their carrier group.

When ManagePolicy 2.0 is available, users will be granted Read-only access to the application. You need to contact your NCRB Group Administrator to obtain Author Only or Edit Access privileges.

The North Carolina Rate Bureau is offering four training sessions to familiarize users with the new features being offered in ManagePolicy 2.0. These sessions are one hour and fifteen minutes each and will be conducted via the internet. The training will use AT&T's web conferencing software. During the first hour, we will walk through the ManagePolicy User Guide to review the features of the system. The last fifteen minutes will be open for questions.

The training sessions will be held on Tuesday, November 9th, Thursday, November 11th, Tuesday, November 16th, and Thursday, November 18th. Refer to the attached ManagePolicy Features document for additional information related to the training sessions.

If you have questions, you may contact the Information Center at 919-582-1056 or help@ncrb.org.

Sincerely,

Sue Taylor

Director of Insurance Operations

ST:dms

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ManagePolicy Features

The ManagePolicy web-based application serves as a tool for carriers to search, view, make modifications to existing policy data and create new policy data. ManagePolicy provides carriers with tools to proactively resolve data reporting or coverage issues. Some features of the system are:

➢ **View-**Users can view policy information as it resides in the NCRB database for policies effective within the previous three years.

➢ **Create Transaction-**Users can create a transaction that either creates a new policy, or create one or more transactions that make the desired modifications to an existing policy (either directly, or through policy replacement).

➢ **Submission Search, Creation and Status-**ManagePolicy allows users to view all validated transactions, to create a submission file for download, and to submit a submission file for DCO processing. Additionally, users can view the status of a submission by using submission id or date range received by NCRB. From this view the user will also be able to see what reports or error reports are available for each submission.

➢ **Search Options-**The ManagePolicy system provides various ways to search including search by carrier id, policy number, coverage id, policy effective date range, policy expiration date range, and employer's name.

➢ **Error Report Retrieval and Download-** NCRB's policy tape error reports for submissions received within the previous six months will be available in ManagePolicy. Users can view and download the error reports. The downloaded error reports will be available in a variety of formats. In addition, users can now search for errors across multiple submission files as well as view the error resolution status on certain types of errors.

➢ **MyList-** Displays the MyList page, a personalized view of specific policy, transaction, and error records that you have identified.

➢ **Access to the Experience Rating Worksheet and Unit Statistical Report Information-**Links in ManagePolicy will take users directly to the experience rating worksheet or to a summary of the unit stat information.

➢ **Online help-** To assist you with using the system, the Help Page in Manage Policy contains a link to the User Guide as well as a list of Frequently Asked Questions and Answers.

How do I access ManagePolicy?

In order to access the ManagePolicy web application, you must have a valid NCRB logon id and password. It is the responsibility of your NCRB Group Administrator to grant users at your company access to ManagePolicy so that your company can be assured that only the appropriate users are given security rights to your policy data.

Users who DO NOT HAVE a NCRB logon id:

If you do not have a NCRB logon id, you need to determine if your company has a NCRB Group Administrator by calling NCRB's Information Center at 919-582-1056. If your company has a NCRB Group Administrator, this individual has the ability to create a logon id for you and can give you access to the ManagePolicy system.

If your company does not have a NCRB Group Administrator, your company should establish one by completing a Group Administrator Account Registration form. The Group Administrator will be responsible for managing individual user accounts for your organization and will serve as our primary contact for web account administration. We realize member companies may have users in different divisions, departments and/or geographical locations. To simplify the administration process, it is recommended that you select a single Group Administrator for your company or group of companies who will have the option to delegate administrative rights to additional member users within your company as needed to most efficiently manage your user accounts.

You can obtain the Group Administrator Account Registration form on NCRB's website at www.ncrb.org. Click the NCRB button, then the Workers Comp Services button. On the Workers Comp Services page, under the Web Application Supporting Materials section there is a link to the Web Security New User Account Instructions.
NOTE: Due to a high volume of anticipated Group Administrator Account Registration forms; it might take up to a week to process the application. The Group Administrator will be notified via e-mail as soon as the account is set up.

Users who ALREADY HAVE a NCRB logon id:
Does your company have a NCRB Group Administrator?

NOT SURE – If you are not sure whether your company has a NCRB Group Administrator, you can request this information by calling NCRB's Information Center at 919-582-1056.

YES – On approximately November 1st, your company's Group Administrator will be given access to ManagePolicy. Your Group Administrator is responsible for granting access to ManagePolicy for additional users at each company. Your Group Administrator can contact the NCRB Information Center if any assistance is needed with granting access to your logon account.

NO - If your company does not have a NCRB Group Administrator, see the instructions above for "Users who DO NOT HAVE a NCRB logon id". This section provides instructions on how to set up a Group Administrator for your company. A Group Administrator has to be set up, even if you already have a logon id.

Training

NCRB is offering four training sessions to educate users on the features of the ManagePolicy system. During the training session, we will walk through the ManagePolicy Training Guide to review the features of the system. We recommend printing a copy of the ManagePolicy Training Guide so that you can make notes. The ManagePolicy Training Guide can be downloaded from the following URL:

http://www.ncrb.org/NCRB/LinkClick.aspx?link=ncrb%2fworkers+comp+services%2fpublicati
ons%2fManagePolicy+Training+Guide+-+Oct+2010.pdf&tabid=92&mid=621

The training will use AT&T's web conferencing software and there is a teleconference number that you can dial for the audio portion of the session. We recommend that you join the web conference at least ten minutes prior to the start of the session so you have time to install the client software.

	Session 1	Session 2	Session 3	Session 4
Date	Tuesday, November 9th	Thursday, November 11th	Tuesday, November 16th	Thursday, November 18th
Time	2:00-3:15 p.m. EST	11:00-12:15 p.m. EST	2:00-3:15 p.m. EST	11:00-12:15 p.m. EST
Phone Number	(877)877-848-7030 Password: 5679016	(877)877-848-7030 Password: 5679016	(877)877-848-7030 Password: 5679016	(877)877-848-7030 Password: 5679016
Web Conference	www.webmeeting.att.com Meeting #: 8778487030 Access Code: 5679016	www.webmeeting.att.com Meeting #: 8778487030 Access Code: 5679016	www.webmeeting.att.com Meeting #: 8778487030 Access Code: 5679016	www.webmeeting.att.com Meeting #: 8778487030 Access Code: 5679016

Who do I call for help?

If you need assistance with getting started on the ManagePolicy system, a ManagePolicy User Guide, Training Guide and Getting Started Guide is available on NCRB's website. Go to www.ncrb.org Click the NCRB menu, then the Workers Comp menu then Carrier. On the Workers Comp Carrier page, under the Manuals and Instructions section there are links to the ManagePolicy guides.

You can also call the NCRB Information Center at 919-582-1056 or email at wcinfo@ncrb.org.