ManagePolicy Getting Started Guide

This guide provides a high-level overview of ManagePolicy features. For detail information about ManagePolicy, refer to the *ManagePolicy User Guide*.

Accessing ManagePolicy

You can access ManagePolicy from the Secured Members Area of the NCRB, NCRF and NCIGA Web site. After logging in, the Secured Members Area page displays all secured applications that you have been authorized to access. To access ManagePolicy, select ManagePolicy from the Workers Comp menu.

Searching for Policies and Transactions

The Search page allows you to search for transactions and processed policies. You can specify the status of the transactions or policies you're searching for and define policy-specific filter criteria to narrow your search. When you execute the search, all policy and/or transaction records matching your criteria will be returned in the search results. Transactions appear with a value in the Txn Code and Web Status column, whereas processed policies have no value in these columns. From the search results, you can access transaction or policy details by clicking the Policy Number hyperlink.

The Carrier ID list in the upper left-hand corner of the Search page allows you to specify one or more carriers for your search. At least one carrier must be selected.

You can specify whether you want to search for transactions, or policies, or both; enter a specific Status to search for; and define additional filter criteria, such as a Combo ID or a Policy Effective Date range (in which case, the search returns only records where the field value matches the value you enter.)

Creating Transactions

ManagePolicy enables you to create new transactions and save them for download or submission. The Create Transaction menu presents two choices, Create New Policy, and Create Txn from Existing Policy, with transaction code sub-choices for each. The Create New Policy menu sub-choices should be used to create transactions for policies that have not been submitted previously to the NCRB for processing. The Create Txn from Existing Policy menu sub-choices should be used to modify data on policies already in the NCRB's system.

Note: The Create Txn from Existing Policy sub-choices will be restricted based on the policy you are currently viewing.

When you choose one of the Create New Policy options, the Transaction Detail page appears with no values. When you choose one of the Create Txn from Existing Policy options, the Transaction Detail page appears with certain values pre-populated from the transaction or policy that you are currently viewing.

The following sections provide an example of creating transaction starting with a blank Transaction Detail page and an example of creating a transaction with data from an existing policy or transaction.

Create New Policy

This example describes how to create a Transaction 01 starting with a blank Transaction Detail page.

To create a new transaction, perform the following steps:

1. Select Create Transaction > Create New Policy > 01 - New Policy.

   The Key Data dialog appears. Specify a Carrier Code by selecting it from the drop-down list, enter values in the Policy Number, Policy Effective Date, and Issue Date fields, and click Save.

2. The Transaction Detail page appears. Four tabs are disabled: Cancellations/Reinstatements, Noncompliance, ManageUSR, and WCRatings.

   On each of the available tabs, enter the required information and click Save. For details about each tab, refer to "Modifying Policy Data" in the *ManagePolicy User Guide*.

3. If you have entered all required data on each editable tab, click the Validate button to validate the transaction data. The transaction must be validated before it can be submitted to the NCRB for processing. Alternatively, if you cannot complete the transaction within your session, you can save and return to the transaction later; the transaction will have a status of In Progress, retaining all the data you have entered.

Create Txn From Existing Policy

This example describes how to create a Transaction 14 from an existing policy or transaction.

To create a new transaction, perform the following steps:

1. View a processed policy or a valid Validated transaction.

2. Select Create Transaction > Create Txn from Existing Policy > 14 - Policy Replacement due to Misc Change.

   The Key Data dialog appears. All fields are read-only except Issue Date. Specify Issue Date and click Save.

3. The Transaction Detail page appears. Four tabs are disabled: Cancellations/Reinstatement, Compliance/Noncompliance, ManageUSR, and WCRatings.

   On each of the available tabs, enter the required information and click Save. For details about each tab, refer to “Modifying Policy Data” in the *ManagePolicy User Guide*.

4. If you have entered all required data on each editable tab, click the Validate button to validate the transaction data. The transaction must be validated before it can be submitted to the NCRB for processing. Alternatively, if you cannot complete the transaction within your session, you can save and return to the transaction later; the transaction will have a status of In Progress, retaining all the data you have entered.

Submitting Transactions for DCO Processing

After you have created the transactions required to create or modify a policy, you can submit the transactions for DCO processing. Transactions are submitted in the form of a Submission file (a *WCPOLS file*).

After selecting the transactions to include, you can create a Submission file containing all the transaction details and either submit the file for processing or download the file for review.

When you select Create Submissions File from the Submissions menu, the Create Submission File page appears. The grid lists all Validated transactions. You can use the search fields to find the transactions you want to submit. After you have specified search criteria, click the Search button. The grid displays all transactions matching your criteria.

To create a Submission file that you want to submit for processing, select one or more transactions by clicking the checkbox in the corresponding rows, then click the Submit to Bureau button. The Submission file is created for the selected transactions and the file is submitted for processing. The status of the transactions is changed to Submitted and the transactions are removed from the screen.

To create a Submission file for review purposes, select one or more transactions by clicking the checkbox in the corresponding rows, then click the Download WCPOLS button. The Submission file is created for the selected transactions and you will be prompted to either view the file or save it locally.

Note: If you would like to download individual transaction data to a WCPOLS file you should do this before you submit to the bureau for processing. Once submitted, you will have access to the WCPOLS file, but it will contain data for all transactions within the submission.

Viewing Status of Submitted Submissions

After you have submitted transactions for processing, you may want to review the details of the included transactions. You can do this by accessing the submission on the View Submitted Submissions page.

To view submitted submissions, select Submissions > Search By Submission > Submitted ManagePolicy Submissions from the menu.

The grid lists all submitted submissions from ManagePolicy that have not been processed by the NCRB. Data is processed in batch at night, so typically the data on this screen is only available on the day you submit. You can click a value in the Filename column to view or download the Submission file containing all transaction details for the submission.

Each row in the grid can be expanded to display the transactions included in the submission. When you click the arrow icon in the first column, the list of transactions appears. You can collapse the list by clicking the arrow icon again.

In the list of transactions, you can click a Transaction Code value to access the Transaction Detail page for that transaction. Submitted transactions are read-only.

Viewing Processed Submissions

After a submission has been processed, you can check on the status of the submission in order to determine if it was rejected, accepted, or accepted with errors. ManagePolicy displays status on all submissions received at the Bureau, including submissions received from other systems such as PEEP or a carrier’s policy entry system. ManagePolicy only displays details on submissions received within the previous six months.

You can search for a submission and view details about the submission, such as how many transactions were included, how many were accepted, how many were rejected, etc. If there were errors in processing, you can access error reports. If the submission was created using ManagePolicy, you can also download the Submission file.

To search for processed submissions, choose Submissions > Search By Submission > Processed Submissions from the menu.

The View Processed Submissions page displays fields that allow you to specify search criteria. When you execute the search, all submissions records matching your criteria will be returned in the search results.

After you have specified search criteria, click the Search button. The grid displays all submissions records matching your criteria.

Each row in the grid can be expanded to display the transactions included in the submission. When you click the arrow icon in the first column, the list of transactions appears. You can collapse the list by clicking the arrow icon again.

Viewing Submission Status

The search results grid of the View Processed Submissions enables you to view details about the submission. If there were errors in processing, you can access error reports by clicking the View hyperlink in the error reports columns. If the submission was created using ManagePolicy, you can also download the Submission file.

After you have searched processed submissions, the grid displays all submissions records matching your criteria. The grid displays submission details, such as how many transactions were included, how many were accepted, how many were rejected, the date when the submission was received and when it was processed.

Each row in the grid can be expanded to display the transactions included in the submission. When you click the icon in the first column, the list of transactions appears. You can collapse the list by clicking the icon again.

You can click a value in the Submission ID column to access a Submission Summary Report. Refer to "Viewing Submission Summary" for more information.

If the submission was created using ManagePolicy, you can click a value in the File Name column to download the Submission file containing all transaction details for the submission.

The last four columns in the grid provide access to various error reports, as described in the *ManagePolicy User Guide*.

Viewing Submission Summary

The Submission Summary Report Results page displays details about the Submission and a grid that lists the transactions that were included in the submission.

If the policy data associated with the transaction is available in ManagePolicy, the Policy Number will display as a hyperlink. When you click a Policy Number value in the grid, the Policy Detail page appears.