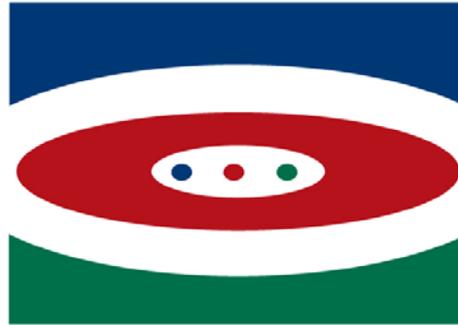


NCRB-NCRF-NCIGA



north carolina

RATE BUREAU

REINSURANCE FACILITY

INSURANCE GUARANTY ASSOCIATION

# ManageUSR Training Guide

Version 1.1

North Carolina Rate Bureau  
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If at any time during these procedures assistance is needed, please contact the NCRB, NCRF and NCIGA Information Center at:

Phone: 919-582-1056  
Fax: 919-783-7467  
E-mail: [wcinfo@ncrb.org](mailto:wcinfo@ncrb.org)

<b>Accessing ManagePolicy USR .....</b>	<b>1</b>
Logging into the Secured Members Area.....	1
Launching an Application .....	2
<b>ManagePolicy USR.....</b>	<b>3</b>
<b>Searching for USRs .....</b>	<b>4</b>
General Search .....	4
Search By Claim.....	6
Search By Submission .....	8
Current View Search .....	10
Search By Status.....	12
<b>View USR.....</b>	<b>13</b>
USR Details .....	13
Header .....	14
Exposure Tab.....	15
Loss Info Tab .....	18
<b>Create, Modify, Correct, and Replace USRs.....</b>	<b>21</b>
Create USR .....	21
Entering Header Info.....	21
Entering Exposure Info .....	23
Adding Splits to Exposure.....	27
Entering Loss Info .....	28
Modify USR .....	32
Correct USR .....	32
Replace USR.....	33
<b>Submitting USRs for DCO Processing .....</b>	<b>34</b>
Remove USR from WCSTAT File List.....	34
Submit to Bureau.....	35
Downloading a Submission File.....	35
View Submission Details.....	35
<b>Viewing Error Reports .....</b>	<b>36</b>
View/Print Reject Report from Search screens .....	36
Print USR Reject Report.....	37
Download USR Reject Report .....	38
Viewing USR Fines Detail Report .....	39

# Accessing ManagePolicy USR

Begin by accessing ManagePolicy USR from the Secured Members Area of the NCRB, NCRF and NCIGA Web site. This section describes how to get to the Log On page, enter credentials, and access ManagePolicy USR.

## Logging into the Secured Members Area

The Secured Members Area will provide access to all of the secured applications and data on the NCRB, NCRF and NCIGA Web site, all users must log on to the Secured Members Area before accessing ManagePolicy USR. To log in to the Secured Members Area, use the following procedure. (User must use the valid user name and password that they were provided.)

1. On the NCRB Web site (<http://www.ncrb.org>), click the NCRB link and then click on Workers Comp Services link. Under the Member Services area, click the Logon to NCRB Portal link. The Secured Members Area Logon page displays.

The screenshot shows the login interface for the NCRB, NCRF, and NCIGA. The header includes the logos for NCRB-NCRF-NCIGA and the North Carolina Rate Bureau, Reinsurance Facility, and Insurance Guaranty Association. The date 11/13/2012 is displayed. The main content area is titled 'Logon' and contains the following text: 'Web Applications can only be accessed by authorized personnel. Access requires a secure logon before any reports or functions can be accessed. Users of the system must first be authorized.' Below this, there are links for 'Need a Logon Account?' and 'Already have a Logon Account?'. The 'Logon' section prompts the user to enter their Logon ID and Password, with a 'Logon' button. A callout box labeled 'Logon' points to the button. At the bottom, there is a 'Forgot Your Password?' link and contact information for the North Carolina Rate Bureau, North Carolina Reinsurance Facility, and North Carolina Guaranty Association.

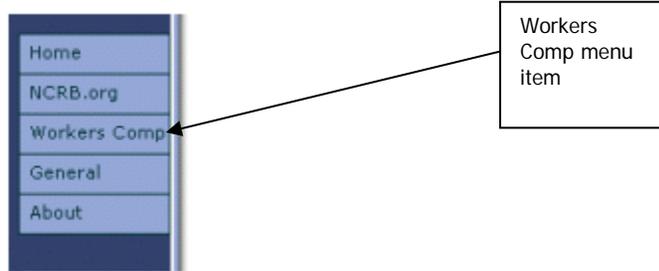
2. Enter the Logon ID and password. Click the Logon button. The Secured Members Area page displays.

**Note:** If an incorrect user name or password is entered, the system will return an error message to inform the user of the invalid data. Re-enter the user name and password correctly, and click the Logon button to enter the system.

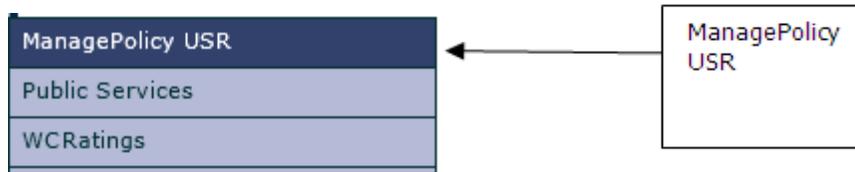
# Launching an Application

The Secured Members Area is the common place from which all secured applications are accessed on the NCRB, NCRF and NCIGA Web site. Only applications a user has been authorized to access will be displayed. All of the applications are categorized based upon the business unit that the application represents. To launch an application, follow these procedures:

1. On the left navigation menu, click Workers Comp.

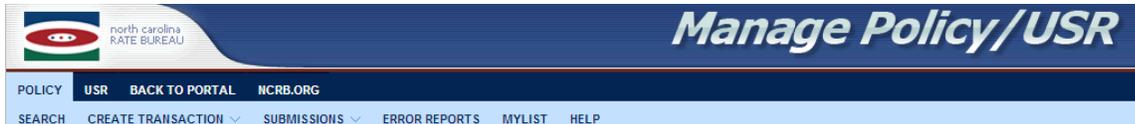


2. On the sub-menu, click ManagePolicy USR. The application page displays.



# ManagePolicy USR

The ManagePolicy and ManageUSR web applications have been combined into one location. The different applications will be selected by either the Policy (ManagePolicy) or USR (ManageUSR) tabs at the top of the menu. If a user only has access to ManagePolicy they will not have a USR menu and vice versa if a user only has access to ManageUSR they will not have a Policy tab.



ManagePolicy/USR features a menu bar that is displayed at the top of the application window. The menu bar is visible regardless of which page is currently displayed.

- **Policy**—Navigates a user to the ManagePolicy portion of this web application. See the ManagePolicy User Guide for guidance with the application.
- **USR**—Navigates a user to the ManageUSR portion of this web application.
- **Back to Portal**—Displays the NCRB Portal Home page.
- **NCRB.ORG**—Displays the NCRB Web site Home page.

# Searching for USRs

The different Search pages allows a user to search for USRs in different manners. Each search screen offers different criteria to search. We will go through each one to show the difference in the screens.

## General Search

The General Search page displays fields that allow a user to specify search criteria for USRs. When the search is executed, all USRs matching the criteria will be returned in the search results. From the search results, the USR details can be accessed by clicking the hyperlink of the policy#.

Enter one search criteria or a combination of criteria to execute a search.

SEARCH USR : General Search Data was last updated on 01/28/2016

General Search | Search By Claim | Search By Submission | Current View Search | Search By Status

Carrier ID

Policy No.

Policy Eff. Date From  Policy Eff. Date To

Report No.

Corr. Seq. No.

Combo ID

Coverage ID

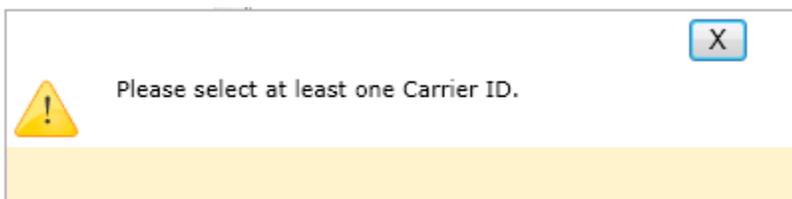
Edit No.

Edit Status

Processed Date From  Processed Date To

Web Status

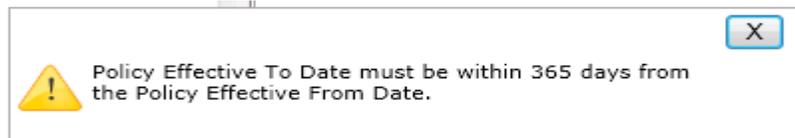
- A carrier must always be selected. Choose 'Select All Carriers' or select one or more by clicking the checkbox beside the carrier information.



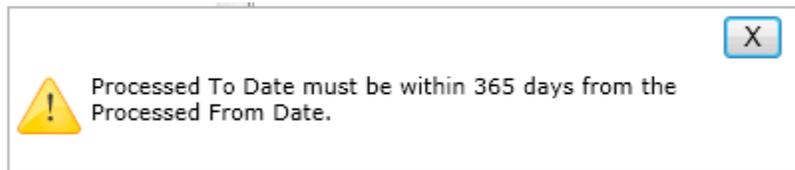
- The policy number can be partial or complete. The partial search must contain at least 3 characters or an error will be produced and no search results will be returned until it has been corrected for a proper search.



- The policy eff. from and to dates are only allowed to span one year (365 days). If the length is longer than 365 days, an error will be produced and no search results will be returned until it has been corrected for a proper search.

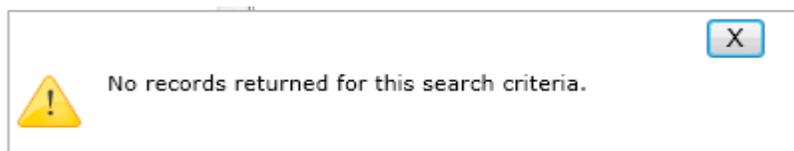


- The report number is a drop down that contains the report numbers that NCRB accepts 01-10.
- The correction sequence number is a numeric field. If the USR was reported with a correction report number of 0-9, search for 0-9 (the system will prefill to show 2 digits such as 00 or 01). If the USR was reported with a correction A this would be equal to 10 and so forth thru Z which is equal to 36.
- The processed from and to dates are only allowed to span one year (365 days). If the length is longer than 365 days, an error will be produced and no search results will be returned until it has been corrected for a proper search.



- The web status is a drop down with the applicable statuses for NCRB.
- The Search button will execute the search.
- The Reset button will clear all criteria and the selected carriers.

If the entered criteria returned no search results the following message will be displayed. This means we did not have any USRs that match the entered criteria.



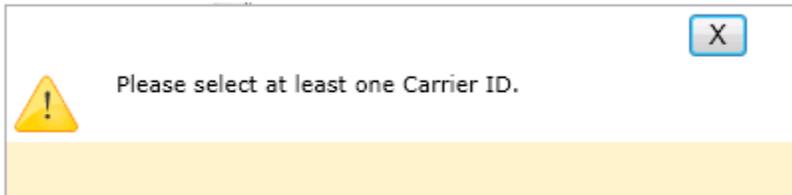
# Search By Claim

The Search By Claim page allows a user to search for USRs with the specified claim number or partial claim number. From the search results, a USR details can be accessed by clicking the hyperlink of the policy#.

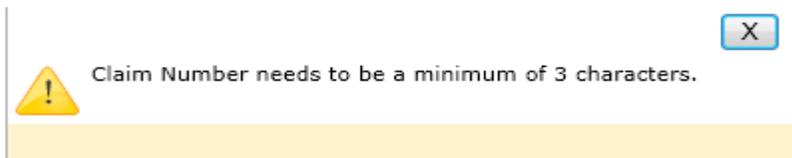
Enter one search criteria (claim no. must be entered) or a combination of criteria to execute a search.

The screenshot shows the 'Manage Policy/USR' web application interface. At the top left is the North Carolina Rate Bureau logo. The main header is 'Manage Policy/USR'. Below the header is a navigation bar with links: POLICY, USR, BACK TO PORTAL, NCRB.ORG, SEARCH, CREATE USR, MY LIST, REPORTS, CREATE WCSTAT FILE, and HELP. The main content area is titled 'SEARCH USR : Search By Claim' and includes a sub-header 'Data was last updated on 01/28/2016'. There are five search tabs: General Search, Search By Claim (selected), Search By Submission, Current View Search, and Search By Status. The 'Search By Claim' tab contains four input fields: Carrier ID, Claim No., Policy No., and Policy Eff. Year (a dropdown menu). Below the fields are 'Search' and 'Reset' buttons.

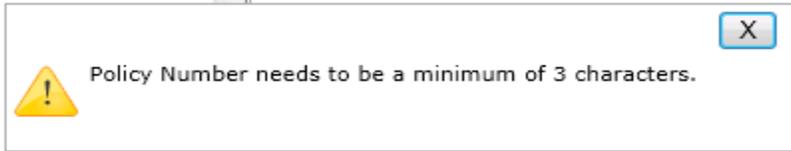
- A carrier must always be selected. Choose 'Select All Carriers' or select one or more by clicking the checkbox beside the carrier information. If no carrier is selected the error below will appear.



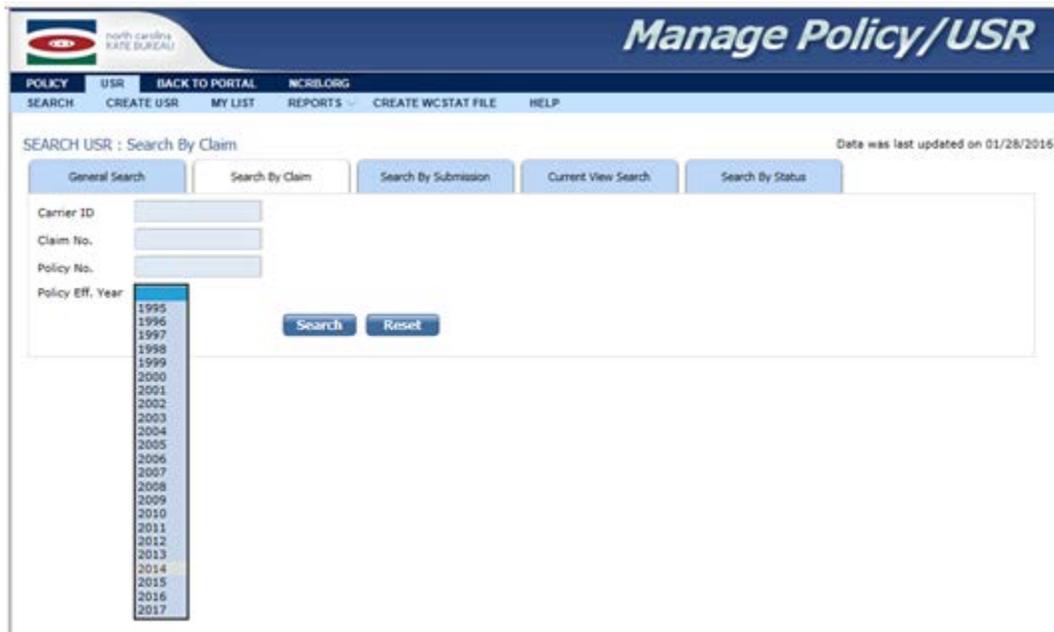
- A claim number must always be entered in the Claim No. field. This can be a complete claim number or a partial number. The partial search must contain at least 3 characters or an error will be produced and no search results will be returned until it has been corrected for a proper search.



- The policy number can be partial or complete. The partial search must contain at least 3 characters or an error will be produced and no search results will be returned until it has been corrected for a proper search.

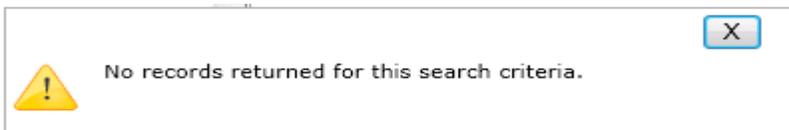


- The policy eff. year is a list of all the years that are displayed in ManageUSR 1996-2014. Claims outside of this range of years will not be viewable.



- The Search button will execute the search.
- The Reset button will clear all criteria and the selected carriers.

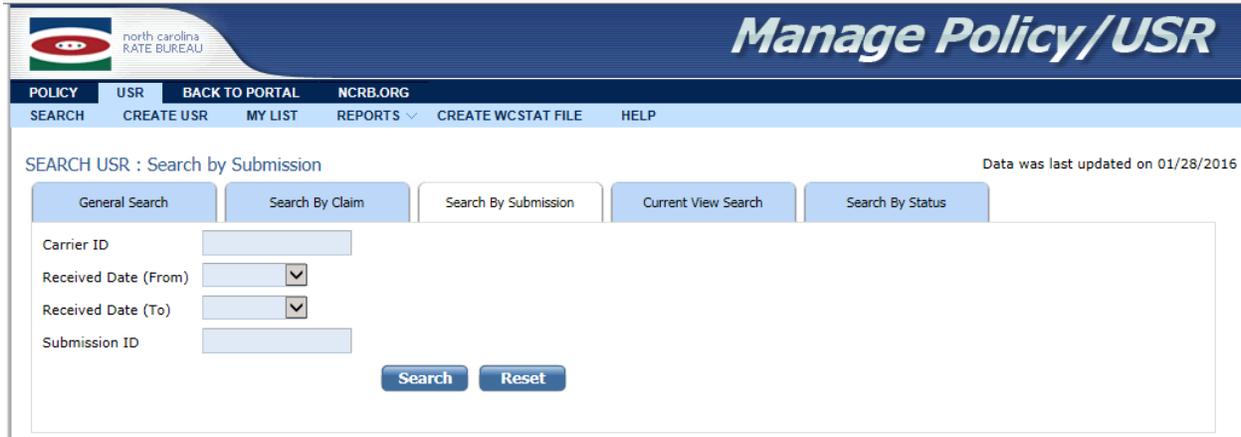
If the entered criteria returned no search results the following message will be displayed. This means we did not have any USRs that match the entered criteria.



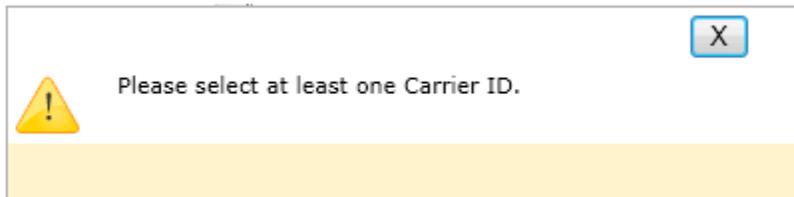
# Search By Submission

The Search By Submission page allows a user to search for USRs with the Submission ID or by the received from and to dates. From the search results, the USR details can be accessed by clicking the hyperlink of the policy#.

Enter one search criteria or a combination of criteria to execute the search.



- A carrier must always be selected. Choose 'Select All Carriers' or select one or more by clicking the checkbox beside the carrier information. If no carrier is selected the error below will appear.



- The Received Date (From) and (To) must be within a 12 month range. If this date is not within the range the error below will appear and the dates must be corrected.



A screenshot of the search interface showing an error message. The 'Received Date (From)' field is set to 12/5/2011 and the 'Received Date (To)' field is set to 12/8/2012. The error message box states: "Received To Date must be within 12 months from the Received From Date." There is a close button (X) in the top right corner.

- The received to date will only be searchable by the last processed date. The last processed date for Tuesday thru Friday would be the prior day. The last processed date

for Monday is the prior Friday. For example: Today is Thursday 1/28/16 the greatest To date could be 01/26/16. The following error will be received if the date is greater than the latest process date available.

SEARCH USR : Search by Submission Data was last updated on 01/28/2016

Carrier ID: 13072  
 Received Date (From): 12/20/2015  
 Received Date (To): 01/31/2016  
 Submission ID: [Empty]

**Received Date To cannot be after 1/26/2016.**

2 record(s) returned

<input type="checkbox"/>	Submission ID	Received Date	Processed Date	Total Rejected	Total Accepted	Total AWW	Total USR(s)
<input type="checkbox"/>	201512240007	12/24/2015	12/24/2015	2	143	39	184
<input type="checkbox"/>	201512230012	12/23/2015	12/23/2015	6	490	61	557

- Submission ID must be the complete submission id, partial id is not acceptable.
- The Search button will execute the search.
- The Reset button will clear all criteria and the selected carriers.

If the entered criteria returned no search results the user will see the following message. This means we did not have any USRs that match the entered criteria.

**No records returned for this search criteria.**

## Current View Search

The Current View Search page allows the user to search for USRs and the current view of the USR. The Current View means this is the view of the USR with all report levels applied. If a USR has 5 report levels however, and the user searches by the Report No 3 then the search results will display the current view as of the 3<sup>rd</sup> report level. From the search results, the user can access USR details by clicking the hyperlink of the policy#.

Enter one search criteria (policy no. must be entered) or a combination of criteria to execute the search.

SEARCH USR : Current View Search Data was last updated on 01/28/2016

General Search | Search By Claim | Search By Submission | **Current View Search** | Search By Status

Carrier ID

Policy No.

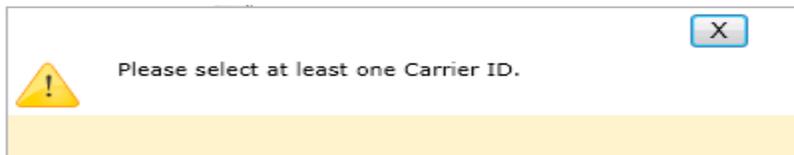
Policy Eff. Date

Report No.

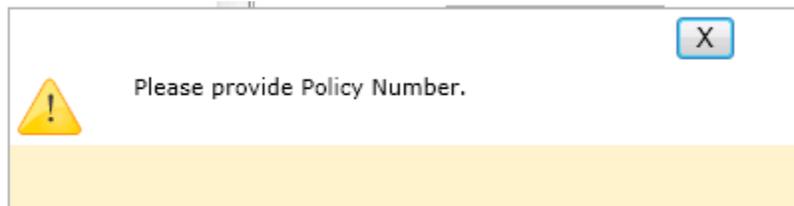
Combo ID

Coverage ID

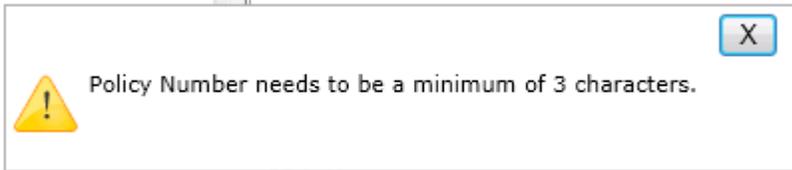
- A carrier must always be selected. Choose 'Select All Carriers' or select one or more by clicking the checkbox beside the carrier information. If no carrier is selected the error below will appear.



- The policy number must always be entered. If the number is not then the error below will appear and must be corrected.

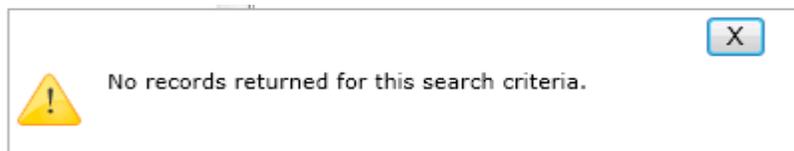


- The policy number can be partial or complete. The partial search must contain at least 3 characters or an error will be produced and no search results will be returned until it has been corrected for a proper search.



- The policy eff. date is a calendar drop down and any date can be chosen.
- The Report No. is a dropdown and has a list of 01-10 as NCRB only accepts reports thru the 10<sup>th</sup> report level.
- Combo ID is a 7 digit field and if the number entered is less than 7 digits then zeroes will be padded to the front of the number to make it 7 digits.
- Coverage ID is an 8 digit field and if the number entered is less than 8 digits then zeroes will be padded to the front of the number to make it 8 digits.
- The Search button will execute the search.
- The Reset button will clear all criteria and the selected carriers.

If the entered criteria returned no search results the following message will be displayed. This means we did not have any USRs that match the entered criteria.

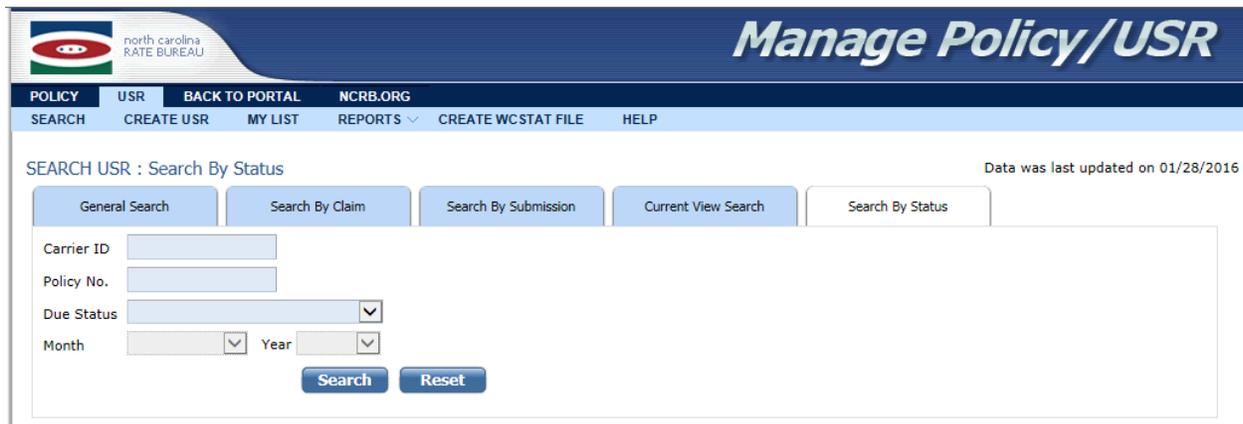


# Search By Status

The Search By Status page allows the user to search for USRs and their current status at NCRB. The statuses are as follows:

- Pre-delinquent – A Pre-delinquent USR is a USR that is less than 18 months past the end of the month in which the corresponding policy became effective.
- Expected – An Expected USR is a USR that is between 18 and 20 months past the end of the month in which the corresponding policy became effective.
- Delinquent – A Delinquent USR is a USR that has either not been submitted to the bureau or has rejected and is more than 20 months past the end of the month in which the corresponding policy became effective.
- Pre-delinquent & Rejected – This is a USR that has been rejected and is also Pre-delinquent.
- Expected & Rejected – This is a USR that has been rejected and is also Expected.
- Delinquent & Rejected – This is a USR that has been rejected and is also Delinquent.

Enter one search criteria or a combination of criteria to execute the search.



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

**Note:** When searching for web units, only *Web Units* will be returned. Web Units are USRs that were created in USR of ManagePolicy USR. USRs from other sources (for example, BEEP), will not be returned in search results.

# View USR

## USR Details

When a user accesses the USR side from ManagePolicyUSR, the General Search page appears. The data will appear and will be **read-only**.

There are numerous ways to access USR details, including clicking a Policy Number in all the search results screens, submission search results and My List.

**Note:** When the USR details are accessed, the data will reflect only the current data for the USR as it resides in the Bureau's database. It will not reflect changes defined in any rejected, submitted or unsubmitted USRs.

The screenshot displays the 'Manage Policy/USR' web application interface. At the top, there is a navigation bar with the North Carolina Rate Bureau logo and the title 'Manage Policy/USR'. Below this is a menu with options like 'POLICY', 'USR', 'BACK TO PORTAL', 'NCRB.ORG', 'SEARCH', 'CREATE USR', 'MY LIST', 'REPORTS', 'CREATE WCSTAT FILE', and 'HELP'. The main content area is titled 'View USR' and shows details for a 'Processed USR'. The USR is identified as 'USR 1 of 1'. Key information includes: Carrier ID: 13072, Report No.: 01, Received Date: 4/7/1998, Submission ID: 199804070003, Policy No.: RMWC1131526, Corr. Seq. No.: 00, Accepted Date: 4/10/1998, Combo ID: 9579622, Policy Eff. Date: 7/1/1996, Correction Type, Edit Status: Accepted, and Coverage ID: 25906790. Below this information are several action buttons: '<< Back', 'Add to My List', 'Add to WCSTAT File', 'Correct', 'Replace', 'Modify', 'Save', 'Cancel', and 'Delete'. The interface is divided into sections: 'POLICY INFO' with fields for Carrier ID, Policy No., Policy Eff. Date, Policy Exp. Date, Report No., Corr. Seq. No., Correction Type, Exposure State, State Eff. Date, Risk ID Number, Replacement Ind, Insured's Name, and Address; 'POLICY CONDITIONS' with checkboxes for 3 yr. F/R Policy, Multi State Policy, Interstate Policy, Retro Policy, Canceled Mid-term, MCO Indicator, and Estimated Audit Code; and 'POLICY TYPE ID' with fields for Type Of Coverage, Type Of Plan ID, Type Of Non Standard ID, Losses Subject To Deductible, Ded Amt Claim/Accident, Ded. Amt Aggregate, and Basis Of Deductible Calculation.

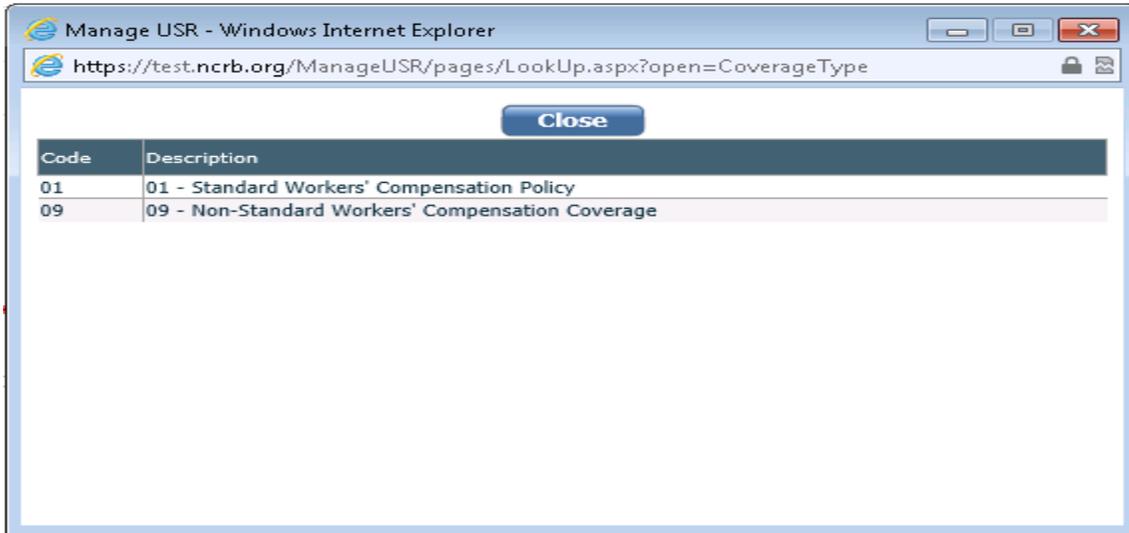
## Header

The Header tab will always display first. The top part of the screen lists the Policy Info and information processed by NCRB if applicable.

The screenshot displays the 'Manage Policy/USR' web application interface. At the top, there is a navigation bar with tabs for 'POLICY' and 'USR', and a 'BACK TO PORTAL' button. Below this is a menu with options like 'SEARCH', 'CREATE USR', 'MY LIST', 'REPORTS', 'CREATE WCSTAT FILE', and 'HELP'. The main content area is titled 'View USR' and shows 'Processed USR' details for 'USR 1 of 1'. Key information includes Carrier ID (13072), Report No. (01), Received Date (4/7/1998), Submission ID (199804070003), Policy No. (RMWC1131526), Corr. Seq. No. (00), Accepted Date (4/10/1998), Combo ID (9579622), Policy Eff. Date (7/1/1996), Correction Type, and Edit Status (Accepted). Below this is a toolbar with buttons for '<< Back', 'Add to My List', 'Add to WCSTAT File', 'Correct', 'Replace', 'Modify', 'Save', 'Cancel', and 'Delete'. The 'Header' tab is selected, showing 'POLICY INFO' fields: Carrier ID, Report No., Exposure State, Risk ID Number, Insured's Name (STANDEX INTERNATIONAL CORPORATION), and Address (6 MANOR PARKWAY, SALEM, NH 3079). 'POLICY CONDITIONS' include checkboxes for 3 yr. F/R Policy, Multi State Policy, Interstate Policy, Retro Policy, Canceled Mid-term, MCO Indicator, and Estimated Audit Code (N). 'POLICY TYPE ID' fields include Type Of Coverage (01), Type Of Plan ID (01), Type Of Non Standard ID (01), Losses Subject To Deductible (00), Ded Amt Claim/Accident (0), Ded. Amt Aggregate (0), and Basis Of Deductible Calculation (00).

When viewing the USR Details on the Header and the field has a code value this field can be double clicked and the available codes will be brought up in a separate popup window. Be careful to always close this popup because if the main ManagePolicyUSR screen is clicked then this popup will be taken behind the screen. The popup will remain open and any code fields clicked will continue to display behind the screen.

For example on the Header tab the Type of Coverage field:



## Exposure Tab

When the Exposure tab is selected the Exposures will appear. The exposure screen is defaulted to have all splits collapsed and to expand the split the (+) next to the split indicator must be clicked. If the USR only has one split indicator it will be listed with a 0 only. If multiple splits are on the USR then they will be displayed as 0, 1, 2, and so on.

### Collapsed view:

**Manage Policy/USR**

POLICY USR BACK TO PORTAL NCRB.ORG

SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

View USR

**Processed USR** USR 1 of 1 Print

Carrier ID: 10243 Report No.: 01 Received Date: 9/11/2015 Submission ID: 201509110011  
 Policy No.: WC292727203 Corr. Seq. No.: 01 Accepted Date: 9/11/2015 Combo ID: 8148686 View Warnings  
 Policy Eff. Date: 2/23/2014 Correction Type: E Edit Status: Accepted With Warning Coverage ID: 06172960

<< Back Add to My List Add to WCSTAT File Correct Replace Modify Save Cancel Delete

Header	Exposure	Loss Info
Split Indicator		
+ 0		
+ 1		

**Exposure Totals**

Subject Premium 54 Standard Exposure 15096 Standard Premium 50 Modified Premium 0 Calculate

View with one split expanded and other collapsed:

The screenshot displays the 'Manage Policy/USR' interface for a processed USR. The header includes the North Carolina Rate Bureau logo and navigation links like 'POLICY', 'USR', 'BACK TO PORTAL', and 'NCRB.ORG'. The main content area shows 'View USR' with a 'Processed USR' status and 'USR 1 of 1' indicator. Key information includes Carrier ID: 10243, Report No.: 01, Received Date: 9/11/2015, Submission ID: 201509110011, Policy No.: WC292727203, Corr. Seq. No.: 01, Accepted Date: 9/11/2015, Combo ID: 8148686, Policy Eff. Date: 2/23/2014, Correction Type: E, Edit Status: Accepted With Warning, and Coverage ID: 06172960. A 'View Warnings' button is present. Below this is a row of action buttons: '<< Back', 'Add to My List', 'Add to WCSTAT File', 'Correct', 'Replace', 'Modify', 'Save', 'Cancel', and 'Delete'. The interface has three tabs: 'Header', 'Exposure', and 'Loss Info'. The 'Exposure' tab is active, showing a 'Split Indicator' section with a collapsed row '- 0' and an expanded row '+ 1'. Below this is a table for 'Subject To Mod' with columns: Update Type, Mod Eff Date, Rate Eff Date, Exp Mod, Expo Act, Class, Exposure, Manual Rate, and Premium Amt. The table contains one row with values: R, 2/23/2014, 2/23/2014, 0.920, 01, 8810, 15096, 0.350, 53. Below the table are sections for 'Not Subject To Mod' and 'Non Standard', both stating 'There are no records available.'. At the bottom, the 'Exposure Totals' section shows input fields for Subject Premium (54), Standard Exposure (15096), Standard Premium (50), and Modified Premium (0), with a 'Calculate' button.

View USR

Processed USR USR 1 of 1 Print

Carrier ID: 10243 Report No.: 01 Received Date: 9/11/2015 Submission ID: 201509110011 View Warnings  
Policy No.: [WC292727203](#) Corr. Seq. No.: 01 Accepted Date: 9/11/2015 Combo ID: 8148686  
Policy Eff. Date: 2/23/2014 Correction Type: E Edit Status: Accepted With Warning Coverage ID: 06172960

<< Back Add to My List Add to WCSTAT File Correct Replace Modify Save Cancel Delete

Header Exposure Loss Info

Split Indicator

- 0

+ 1

Subject To Mod

Update Type	Mod Eff Date	Rate Eff Date	Exp Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt
R	2/23/2014	2/23/2014	0.920	01	8810	15096	0.350	53

Not Subject To Mod  
There are no records available.

Non Standard  
There are no records available.

Exposure Totals

Subject Premium  Standard Exposure  Standard Premium  Modified Premium  Calculate

View with both splits expanded:

**Manage Policy/USR**

POLICY | **USR** | BACK TO PORTAL | NCRB.ORG

SEARCH | CREATE USR | MY LIST | REPORTS | CREATE WCSTAT FILE | HELP

View USR

Processed USR USR 1 of 1 Print

Carrier ID: 10243 Report No.: 01 Received Date: 9/11/2015 Submission ID: 201509110011  
Policy No.: WC292222203 Corr. Seq. No.: 01 Accepted Date: 9/11/2015 Combo ID: 8148686 View Warnings  
Policy Eff. Date: 2/23/2014 Correction Type: E Edit Status: Accepted With Warning Coverage ID: 06172960

<< Back Add to My List Add to WCSTAT File Correct Propose Modify Cancel Cancel

Header Exposure Loss Info

**Split Indicator**

- 0

**Subject To Mod**

Update Type	Mod Eff Date	Rate Eff Date	Exp Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt
R	2/23/2014	2/23/2014	0.920	01	8810	15096	0.330	53

**Not Subject To Mod**  
There are no records available.

**Non Standard**  
There are no records available.

- 1

**Subject To Mod**

Update Type	Mod Eff Date	Rate Eff Date	Exp Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt
P	11/7/2014	11/7/2014	0.920	01	8810	15096	0.330	53

**Not Subject To Mod**  
There are no records available.

**Non Standard**  
There are no records available.

**Exposure Totals**

Subject Premium 54 Standard Exposure 15096 Standard Premium 50 Modified Premium 0 Calculate

If there are multiple class or stat codes listed in a section then this will add pages to the section and this will be viewable by clicking the hyperlink to navigate to the next screen for that section. The pages will be displayed right beneath the section like the example below: (1, 2, 3)

**Manage Policy/USR**

POLICY USR BACK TO PORTAL NCRB.ORG

SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

View USR

Processed USR USR 1 of 1

Carrier ID: 99998 Report No.: 01 Received Date: 7/9/2012 Submission ID: 201207230011  
 Policy No.: TOTALSTEST Corr. Seq. No.: 01 Accepted Date: 7/23/2012 Combo ID: 6495494  
 Policy Eff. Date: 1/1/2010 Correction Type: E Edit Status: Accepted With Warning Coverage ID: 24452870

<< Back Add to My List Add to WCSTAT File Correct Replace Modify Save Cancel Delete

Header Exposure Loss Info

Split Indicator  
- 0

**Subject To Mod**

Update Type	Mod Eff Date	Rate Eff Date	Exp Mod	Expo Act	Class	Exposure	Manual Rate	Premium Amt
P	1/1/2010	1/1/2010	1.000	01	5551	12520	18.950	2373
R	1/1/2010	1/1/2010	1.150	01	5551	12520	18.950	2373
P	1/1/2010	1/1/2010	1.000	01	5645	101252	17.950	18175
R	1/1/2010	1/1/2010	1.150	01	5645	101252	17.950	18175

12

**Not Subject To Mod**  
There are no records available.

**Non Standard**  
There are no records available.

## Loss Info Tab

When viewing the USR Details on the Loss Info tab and the field has a code value this field can be double clicked and the available codes will be brought up in a separate popup window. Be careful to always close this popup because if the main ManagePolicyUSR screen is clicked then this popup will be taken behind the screen. The popup will remain open and any code fields clicked will continue to display behind the screen.

The Loss Info Tab will have all losses displayed in the top grid. By clicking the radial button next to a loss this will bring the information for this loss into the fields displayed below. The loss that is selected will be highlighted and the information will be displayed.



# Manage Policy/USR

POLICY USR BACK TO PORTAL NCRB.ORG  
 SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

View USR

Processed USR Print

Carrier ID: 10243 Report No.: 01 Received Date: 8/13/2015 Submission ID: 201508130005  
 Policy No.: [WC164080922](#) Corr. Seq. No.: 00 Accepted Date: 8/13/2015 Combo ID: 9893742  
 Policy Eff. Date: 1/1/2014 Correction Type: Edit Status: Accepted Coverage ID: 25917740

<< Back Add to My List Add to WCSTAT File Correct Replace Modify Save Cancel Delete

Header Exposure Loss Info

Claim Number  Accident Date  Filter Reset

	Update Type	Claim Number	Accident Date	No Of Claims	Incurred Indemnity	Incurred Medical	Class	Type Of Injury	Claim Status
<input type="radio"/>	R	E2B19313	1/8/2014	1	2000	0	8810	09	1
<input type="radio"/>	R	E2B66484	9/4/2014	1	3125	3176	8810	09	1

Update Type\*  Claim Number\*  Accident Date\*  No. of Claims  Inc. Indemnity   
 Incurred Medical  Class\*  Type of Injury  Claim Status\*

### LOSS CONDITIONS

Loss Act\*  Loss Type\*  Recovery\*  Claim Type\*  Settlement\*   
 Jurisdiction State  Catastrophe Code  MCO Type\*  Injury Part\*  Injury Nature\*   
 Injury Cause\*  Occu. Description  Voc. Reh. Ind.\*  Lump Sum\*   
 Fraud Indicator\*  Paid Indemnity  Paid Medical   
 Claimant Att. Fees  Emp. Attor. Fees  ALAE Paid  ALAE Incurred

Add Loss Update Loss Clear

### LOSS TOTALS

No Of Claims\*  Incurred Indemnity\*  Incurred Medical\*  Paid Indemnity\*  Paid Medical\*   
 Claim Attor. Fees\*  Emp. Attor. Fees\*  ALAE Paid\*  ALAE Incurred\*  Calculate



# Manage Policy/USR

POLICY USR BACK TO PORTAL NCRB.ORG  
 SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

View USR

Processed USR USR 2 of 10 Print

Carrier ID: 10243 Report No.: 01 Received Date: 8/13/2015 Submission ID: 201508130005  
 Policy No.: [WC164080922](#) Corr. Seq. No.: 00 Accepted Date: 8/13/2015 Combo ID: 9893742  
 Policy Eff. Date: 1/1/2014 Correction Type: Edit Status: Accepted Coverage ID: 25917740

Claim Number  Accident Date

Update Type	Claim Number	Accident Date	No Of Claims	Incurred Indemnity	Incurred Medical	Class	Type Of Injury	Claim Status
<input checked="" type="radio"/> R	E2B19313	1/8/2014	1	2000	0	8810	09	1
<input type="radio"/> R	E2866484	9/4/2014	1	3125	3176	8810	09	1

Update Type\*  Claim Number\*  Accident Date\*  No. of Claims  Inc. Indemnity   
 Incurred Medical  Class\*  Type of Injury  Claim Status\*

### LOSS CONDITIONS

Loss Act\*  Loss Type\*  Recovery\*  Claim Type\*  Settlement\*   
 Jurisdiction State  Catastrophe Code  MCO Type\*  Injury Part\*  Injury Nature\*   
 Injury Cause\*  Occu. Description  Voc. Reh. Ind.\*  Lump Sum\*   
 Fraud Indicator\*  Paid Indemnity  Paid Medical   
 Claimant Att. Fees  Emp. Attor. Fees  ALAE Paid  ALAE Incurred

### LOSS TOTALS

No Of Claims\*  Incurred Indemnity\*  Incurred Medical\*  Paid Indemnity\*  Paid Medical\*   
 Claim Attor. Fees\*  Emp. Attor. Fees\*  ALAE Paid\*  ALAE Incurred\*

# Create, Modify, Correct, and Replace USRs

The USR side of ManagePolicyUSR enables users to view processed USRs, but does not allow changes to be made to a USR directly. Changes must be made by creating and submitting a correction or a replacement USR. Replacement USRs are only for USRs with an edit status of rejected.

## Create USR

When a USR is accessed from ManagePolicyUSR, the General Search page appears, with the menu available. Click the Create USR menu to begin creating a USR.

## Entering Header Info

This will bring up a blank USR for the user to begin adding detail to the Header, Exposure and Loss Info.

The screenshot displays the 'Manage Policy/USR' web application interface. At the top, there is a navigation bar with the North Carolina Rate Bureau logo and the text 'Manage Policy/USR'. Below this is a menu bar with options: POLICY, USR, BACK TO PORTAL, NCRB.ORG, SEARCH, CREATE USR, MY LIST, REPORTS, CREATE WCSTAT FILE, and HELP. The main content area is titled 'New USR' and contains a form for creating a new USR. The form is divided into three tabs: 'Header', 'Exposure', and 'Loss Info'. The 'Header' tab is currently selected. The form fields are organized into sections: 'POLICY INFO' and 'POLICY CONDITIONS'. The 'POLICY INFO' section includes fields for Carrier ID, Report No., Policy No., Policy Eff. Date, Policy Exp. Date, Exposure State, Risk ID Number, Insured's Name, and Address. The 'POLICY CONDITIONS' section includes checkboxes for 3 yr. F/R Policy, Retro Policy, Multi State Policy, Canceled Mid-term, Interstate Policy, MCO Indicator, and Estimated Audit Code. Below these are fields for Type Of Coverage, Type Of Plan ID, Type Of Non Standard ID, Losses Subject To Deductible, Ded. Amt Claim/Accident, Ded. Amt Aggregate, and Basis Of Deductible Calculation. A row of buttons at the top of the form includes '<< Back', 'Add to My List', 'Add to WCSTAT File', 'Correct', 'Replace', 'Modify', 'Save', 'Cancel', and 'Delete'. Fields with a red asterisk (\*) indicate required information.

The fields labeled with a red asterisks \* must be completed.

Note: The Correction Type is only required if the Correction Sequence number (Corr. Seq. No.) field is higher than 00.

Required fields on the Header tab must be completed before navigating to any other tab. If this does not occur the following error will appear and must be corrected before navigating to another tab.

If the entered value in the Report No. field is greater than 01 then the Exposure Tab will not be available. The error message below will appear. (Exposures are only applicable to the first report and exposure (E) corrections to the first report.)

## Entering Exposure Info

Once the Header information is complete click the Exposure tab to navigate to the exposure information.

The default view will be a split indicator of 0 and to begin adding exposure information click the 'Add Split' button.

The screenshot displays the 'Manage Policy/USR' web application interface. At the top, there is a navigation bar with the NCRB logo and the text 'north carolina RATE BUREAU'. Below this, a menu bar contains 'POLICY', 'USR', 'BACK TO PORTAL', and 'NCRB.ORG'. A secondary menu bar includes 'SEARCH', 'CREATE USR', 'MY LIST', 'REPORTS', 'CREATE WCSTAT FILE', and 'HELP'. The main content area is titled 'New USR' and contains the following fields and buttons:

- Carrier ID: 99996
- Report No.: 01
- Policy No.: trainingguide
- Corr. Seq. No.: 00
- Policy Eff. Date: 1/1/2010
- Correction Type:

Navigation buttons include '<< Back', 'Add to My List', 'Add to WCSTAT File', 'Correct', 'Replace', 'Modify', 'Save', 'Cancel', and 'Delete'. Below these are three tabs: 'Header', 'Exposure', and 'Loss Info'. The 'Exposure' tab is active, showing a 'Split Indicator' field with the value '0' and an 'Add Split' button. At the bottom, there is an 'Exposure Totals' section with input fields for 'Subject Premium', 'Standard Exposure', 'Standard Premium', and 'Modified Premium', along with a 'Calculate' button.

The Add Split button will open the exposure information to be entered. There are 3 sections: Subject to Mod, Not Subject to Mod and Non-Standard where data can be entered. If a code is entered into the incorrect section an error message will appear, and must be corrected.

Since Exposures are only applicable to a first report the only option in the dropdown for the Update Type will be R. If this is a correction to a first report then the USR should be found and the correction should be created from the processed USR so both the P and R lines of data are available.

The Exp Mod and Expo Act fields are only applicable to the Subject to Mod section and will not be active in the Not Subject to Mod or Non-Standard sections.

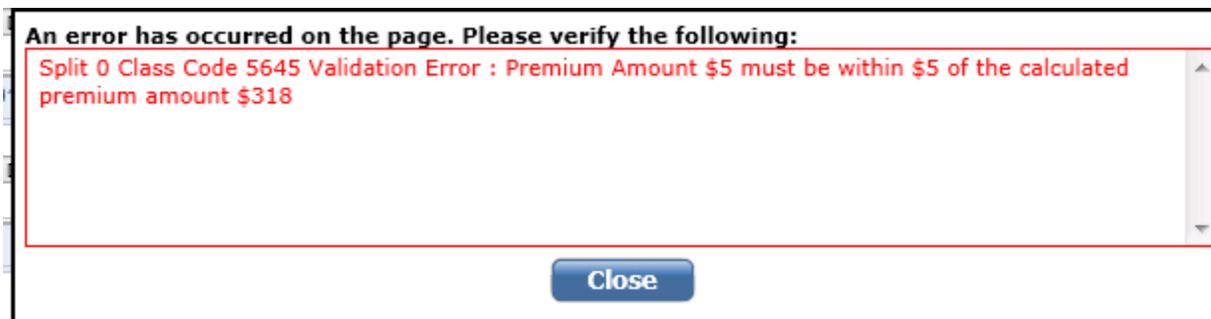
The mod effective date must be the same within a split. If the mod effective date is not the same the below error will appear and this must be corrected. The error will explain which split and which codes have the error. This error will generate upon Saving the entire USR.

The rate effective date must be the same within a split. If the rate effective date is not the same the below error will appear and this must be corrected. The error will explain which split and which codes have the error. This error will generate upon Saving the entire USR.

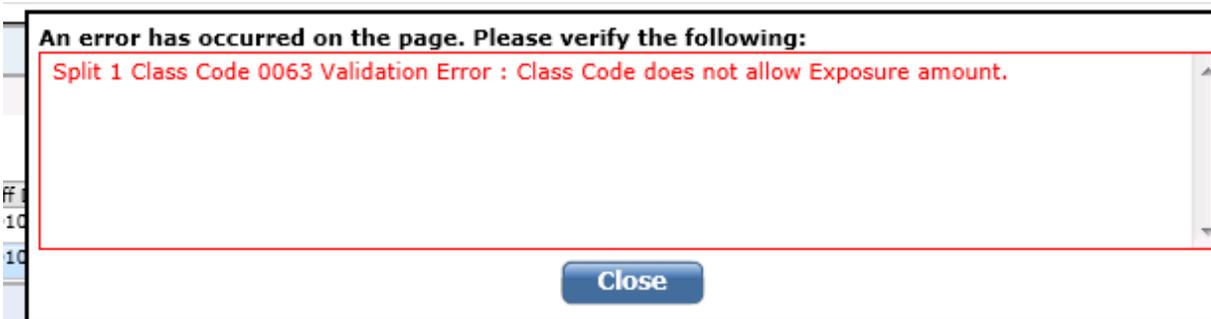
The experience mod must be the same within a split. If the experience mod is not the same the below error will appear and this must be corrected. The error will explain which split and which codes have the error. This error will generate upon Saving the entire USR.



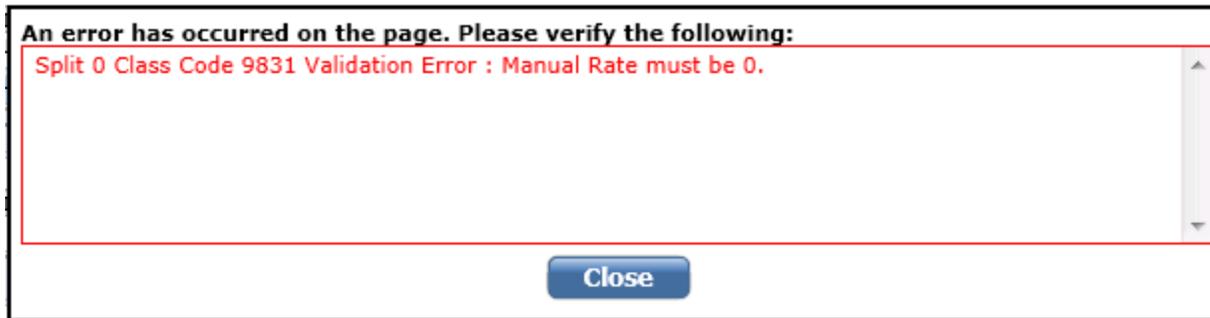
If the premium amount entered is more than 5 dollars different than the premium amount calculated by the USR application the following error will appear and must be corrected. The error will explain which split and which codes have the error. This error will occur upon attempting to add the exposure to the grid and will not allow the exposure to be saved until corrected.



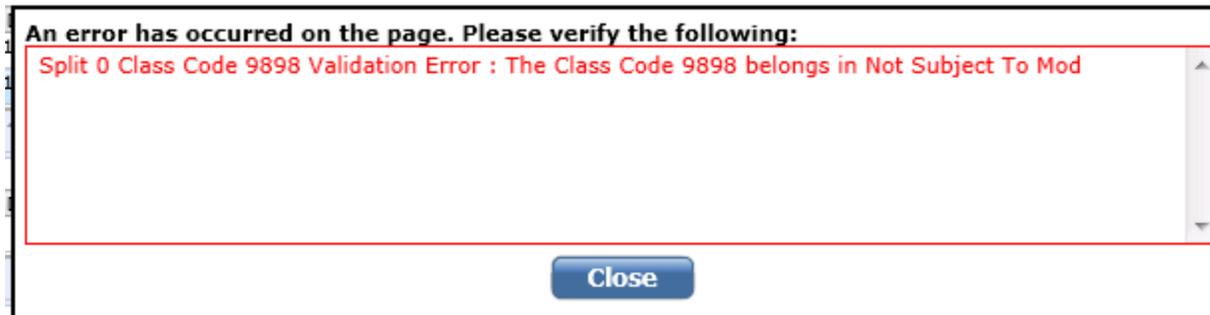
If the class code or stat code entered does not allow exposure then the following error will appear. The error will explain which split and which codes have the error. This error will occur upon attempting to add the exposure to the grid and will not allow the exposure to be saved until corrected.



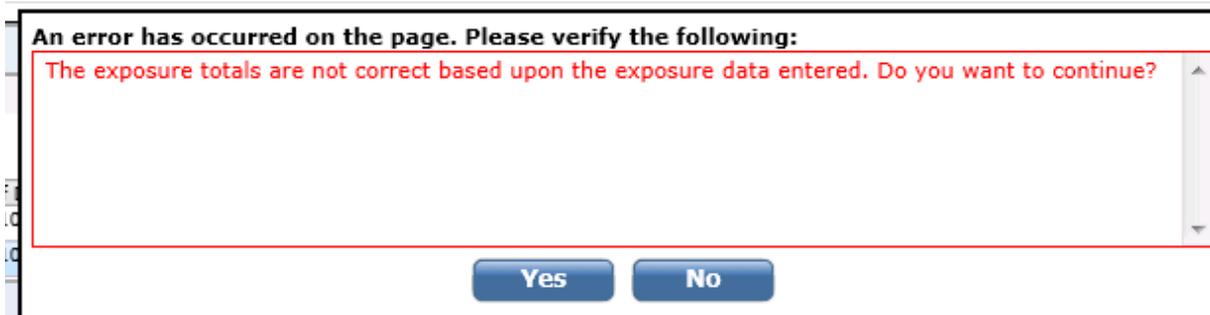
If the class code or stat code entered does not allow a manual rate then the following error will appear. The error will explain which split and which codes have the error. This error will occur upon attempting to add the exposure to the grid and will not allow the exposure to be saved until corrected.



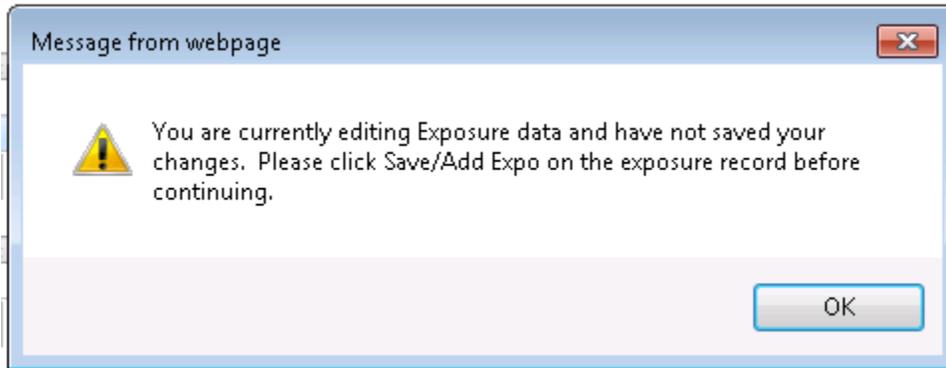
If the class code or stat code entered belongs in a different section the below error will appear. The error will explain which split and which codes have the error. This error will occur upon attempting to add the exposure to the grid and will not allow the exposure to be saved.



The Exposure Totals can be entered by the user or if the Calculate button is selected, calculated by the application. If the totals do not match what is supposed to be on the USR then the Totals can be changed at any time by the user. If the entered totals do not match what the application has calculated the below error will appear. This can be bypassed by clicking Yes to continue. If the totals are incorrect click No to reenter or calculate the totals again.



If a user attempts to navigate away from the Exposure tab and has not saved a row of data the following message will appear.



## Adding Splits to Exposure

Clicking the Add Split button will continue to add splits in sequential order to the Exposure information. The first split is always Split indicator 0. The second is split indicator 1 and so on.

Click the Add Split button to add a new split. Add the exposure information that applies.

All Exposure tab edits apply to all splits.

If a split was added in error the Delete hyperlink can be clicked and this will remove the split.

## Entering Loss Info

If claim information is available for the USR the Loss Info tab can be selected. This will navigate the user to the Loss Info Tab and the loss information can be entered.

The fields labeled with a red asterisk \* are required for each claim.

For Loss Info the Update Type on a 01 Report No and Correction Type of 00 will only be R. If the report level is greater than 01 then the Update Type P and R will be available.

Enter all the data for a Loss and click Add Loss. This will Add the Loss to a grid above the fields.



# Manage Policy/USR

POLICY
USR
BACK TO PORTAL
NCRB.ORG

SEARCH
CREATE USR
MY LIST
REPORTS
CREATE WCSTAT FILE
HELP

Modify USR

Carrier ID: 99996      Report No.: 01  
 Policy No.: trainingguide      Corr. Seq. No.: 00  
 Policy Eff. Date: 1/1/2011      Correction Type:

<< Back
Add to My List
Add to WCSTAT File
Correct
Replace
Modify
Save
Cancel
Delete

Header

Exposure

Loss Info

(There are no losses to be displayed.)

Update Type* <input type="text" value="1"/>	Claim Number* <input type="text"/>	Accident Date* <input type="text"/>	No. of Claims <input type="text" value="1"/>	Inc. Indemnity <input type="text" value="0"/>
Incurred Medical <input type="text" value="0"/>	Class* <input type="text"/>	Type of Injury <input type="text"/>	Claim Status* <input type="text" value="0"/>	

**LOSS CONDITIONS**

Loss Act* <input type="text" value="01"/>	Loss Type* <input type="text" value="01"/>	Recovery* <input type="text" value="01"/>	Claim Type* <input type="text" value="01"/>	Settlement* <input type="text" value="00"/>
Jurisdiction State <input type="text" value="32"/>	Catastrophe Code <input type="text" value="0"/>	MCO Type* <input type="text" value="00"/>	Injury Part* <input type="text" value="00"/>	Injury Nature* <input type="text" value="00"/>
Injury Cause* <input type="text" value="00"/>	Occu. Description <input type="text"/>	Voc. Reh. Ind.* <input type="text" value="N"/>	Lump Sum* <input type="text" value="N"/>	
Fraud Indicator* <input type="text" value="00"/>		Paid Indemnity <input type="text" value="0"/>	Paid Medical <input type="text" value="0"/>	
Claimant Att. Fees <input type="text" value="0"/>	Emp. Attor. Fees <input type="text" value="0"/>	ALAE Paid <input type="text" value="0"/>	ALAE Incurred <input type="text" value="0"/>	

Add Loss   Update Loss   Clear

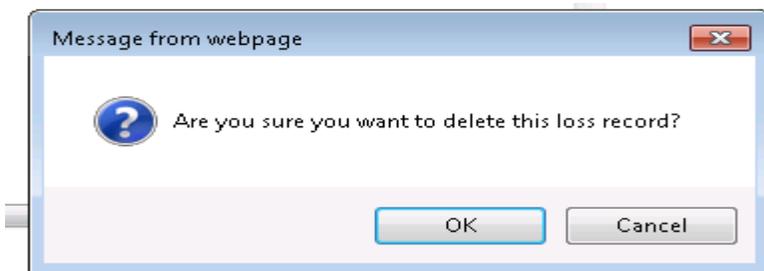
**LOSS TOTALS**

No Of Claims* <input type="text" value="0"/>	Incurred Indemnity* <input type="text" value="0"/>	Incurred Medical* <input type="text" value="0"/>	Paid Indemnity* <input type="text" value="0"/>	Paid Medical* <input type="text" value="0"/>
Claim Attor. Fees* <input type="text" value="0"/>	Emp. Attor. Fees* <input type="text" value="0"/>	ALAE Paid* <input type="text" value="0"/>	ALAE Incurred* <input type="text" value="0"/>	<span>Calculate</span>

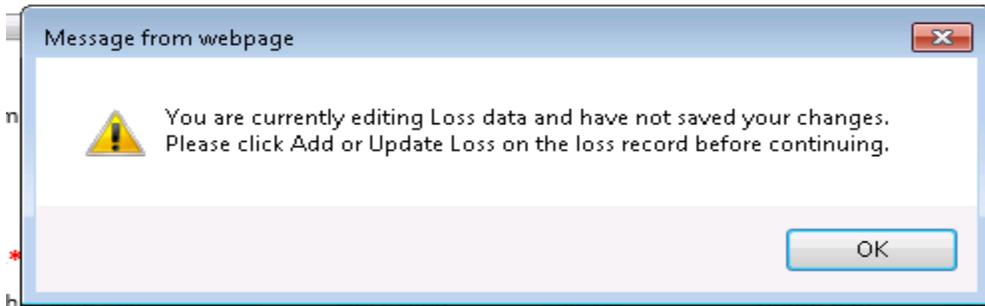
Last modified by Training ManagePolicy on 12/13/2012

The data can be modified by clicking the radial button beside the claim information and this will bring the data back into the fields to be edited.

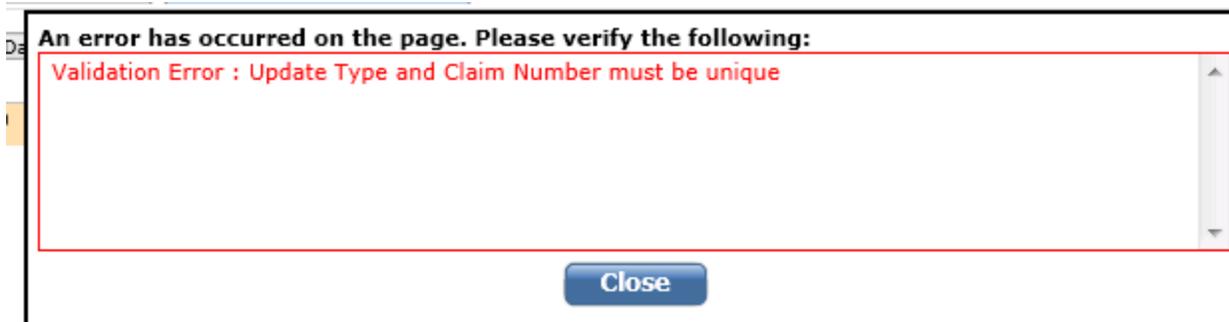
The row can be deleted by clicking the delete hyperlink. A popup will appear asking the user to verify to delete the row or cancel. To undo the delete click Cancel, to continue with the delete click OK.



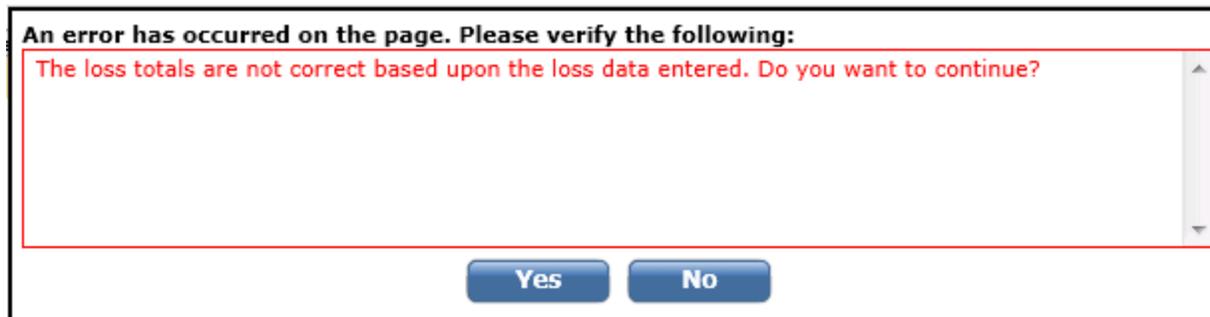
If a user attempts to navigate away from the Loss tab and has not saved a row of data the following message will appear.



If the row of data is being edited and the Add Loss button is selected the error below will appear. The Update Loss button must be selected instead since this row of data is already contained in the Loss Info grid. Add Loss is adding a new loss and Update Loss is updating an existing row of data.



The Loss Totals can be entered by the user or calculated by the application by clicking the Calculate button. If the totals do not match what is supposed to be on the USR then the Totals can be changed at any time by the user. If the entered totals do not match what the application has calculated, the below error will appear. This can be bypassed by clicking Yes to continue. If the totals are incorrect click No to reenter or calculate the totals again.



## Modify USR

To modify a USR the USR must be an Unsubmitted USR. This means the USR has been started and saved but has not been Submitted to NCRB. Navigate to the USR Details and click the Modify button. The tabs available will depend on the Correction Type. The USR can be modified in any way.

## Correct USR

The Correct USR feature should be used to issue a correction to a processed USR with an edit status of Accepted or Accepted with Warnings status. Rejected USRs should be Replaced using the Replace feature of ManagePolicyUSR.

To correct a USR, navigate to the USR details of the USR that needs a correction. Click the Correct button. This will begin the correct process and a popup will appear asking what Correction Type this correction will be; this will enable certain tabs and disable others.

The edits will be the same as Creating a New USR.

Select the correction type to begin the Correction USR.

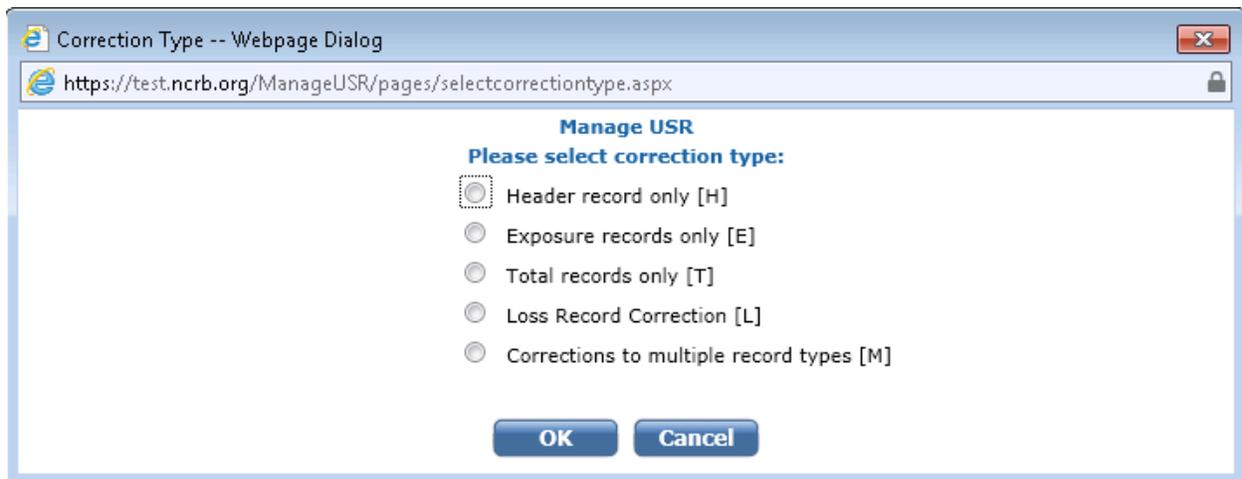
For Header corrections only the Header tab is editable.

For Exposure corrections only the Exposure tab is editable.

For Total record corrections only the Exposure totals and Loss totals are editable.

For Loss record corrections only the Loss tab is editable.

Corrections to Multiple records will allow multiple tabs to be corrected.



## Replace USR

The Replace USR feature should be used to issue a replacement to a USR with an edit status of Rejected.

To replace a rejected USR, navigate to the USR details of the USR that needs to be replaced. Click the Replace button. This will begin the replace process and all tabs will be editable. The tabs that are editable will be determined by the USR that the replace was created. For example: If a 01-01 Exposure correction was rejected and it is being replaced then only the Exposure tab will be editable.

The edits will be the same as Creating a New USR.

# Submitting USRs for DCO Processing

After the Web Units have been created, the Web Units can be submitted for DCO processing. Web Units are submitted in the form of a Submission file (a *WCSTAT file*). Only carriers that are approved to report directly to NCRB can submit a file for processing. Any carrier can create a file for download.

Web Units must be added to the WCSTAT file list before they can be submitted to NCRB for processing.

There are multiple ways to select USRs to add to the WCSTAT file screen to be included in the submission file. From the Search screens select the USRs by checking the first box in the row of the USR data and click the 'Add to WCSTAT file' button.

Navigate to the 'Create WCSTAT File' screen by clicking the menu with that name.

Select the USRs that should be included in the WCSTAT file by clicking the checkbox beside the carrier id. Once all USRs have been selected either click the 'Submit to Bureau' which will create a WCSTAT file and submit the file to NCRB or 'Save/Download' which will create a WCSTAT file for download.



The screenshot shows the 'Manage Policy/USR' interface. At the top, there is a navigation bar with 'POLICY', 'USR', 'BACK TO PORTAL', and 'NCRB.ORG'. Below this is a secondary navigation bar with 'SEARCH', 'CREATE USR', 'MY LIST', 'REPORTS', 'CREATE WCSTAT FILE', and 'HELP'. The main content area is titled 'WCSTAT List' and includes a note: '\* Only Unsubmitted USR(s) can be submitted to the Bureau'. There are three buttons: 'Remove From List', 'Submit To Bureau', and 'Save/Download'. Below the buttons, it says '3 records' and displays a table with the following data:

Carrier ID	Policy Number	Policy Eff Date	Rpt No	Corr Seq No	Status	Status Date
99996	btocobut	1/1/2010	01	00	Unsubmitted	12/3/2012
99996	JESSCATEST	1/1/2010	01	01	Unsubmitted	12/4/2012
99996	MUSRTEST44	3/1/2010	01	01	Submitted	12/4/2012

## Remove USR from WCSTAT File List

If a user would like to remove a USR from the WCSTAT list then click the check box next to the carrier id and click the 'Remove From List' button. This will remove the USRs immediately from the List.

**Manage Policy/USR**

POLICY USR BACK TO PORTAL NCRB.ORG

SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

WCSTAT List

\* Only Unsubmitted USR(s) can be submitted to the Bureau

Remove From List Submit To Bureau Save/Download

3 records

Carrier ID	Policy Number	Policy Eff Date	Rpt No	Corr Seq No	Status	Status Date
99996	bobobob	1/1/2010	01	00	Unsubmitted	12/3/2012
99996	JESSICATEST	1/1/2010	01	01	Unsubmitted	12/4/2012
99996	MUSRTEST4A	5/1/2010	01	01	Submitted	12/4/2012

## Submit to Bureau

To create a Submission file that for processing, select one or more USRs by clicking the checkbox in the corresponding rows, then click the 'Submit to Bureau' button.

The Submission file is created for the selected USRs and the file is submitted for processing.

**Note:** After a submission has been submitted for processing, the included USRs will no longer be editable. Once the USRs have been processed the Status of the USR will change to either: Not Processed, Accepted, and Accepted with Warnings or Rejected.

## Downloading a Submission File

To create a Submission file for review purposes, select one or more USRs by clicking the checkbox in the corresponding rows, then click the 'Save/Download' button.

The Submission file is created for the selected USRs and there will be a prompt to either view the file or save it locally.

## View Submission Details

To view the USRs that were submitted in a submission file, go to the Search by Submission screen from the Search menu and search for a received date (from) and (to) or a submission id.

When the results are displayed, select one or more submissions by clicking the checkbox in the corresponding rows, then click the 'View Submission Details' button.

The USRs from the selected submissions will be displayed.

**Manage Policy/USR**

POLICY USR BACK TO PORTAL NCRB.ORG

SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

Search USR : > Search By Submission > View Submission Detail

<< Back Add to My List Add To WCSTAT File View USR(s) Detail View/Print Reject Report Download Reject Report

4 record(s) returned

Carrier ID	Policy Number	Policy Eff Date	Rpt No	Corr Seq No	Corr Type	Combo ID	Coverage ID	Submission ID	Edit Status
99996	JESSICATEST	01/01/2010	01	00		6495730	24455220	20120970003	Accepted With Warning
99998	WITS21228	01/01/2009	01	00		6496190	24459920	201209270001	Accepted With Warning
99998	WITS21228	01/01/2009	01	01	E	6496190	24459920	201209270002	Accepted
99998	WITS21228	01/01/2009	01	02	E	6496190	24459920	201209270004	Accepted

# Viewing Error Reports

The Reject Report for processed USRs is viewable from the Search screens as well as the USR Details screen. A single USR or multiple USRs can be selected by clicking the 'View/Print Reject Report' this will bring up the Reject Report in a report builder. The report will be generated and this can be printed from the popup or can be exported or downloaded.

## View/Print Reject Report from Search screens

To view the USR reject report for any rejected USRs. Click the checkbox next to one or multiple USR records and click the View/Print Reject Report.

With the desired results displayed, click the Print Results button. A preview window will appear, displaying a Print button and an Export link. Click the Print button, the results are sent to the printer. To export the results, select the desired format and click Export. The pop up will display a prompt to specify filename, and location to which the results will be exported.

The screenshot shows the 'Manage Policy/USR' web application interface. At the top, there is a navigation bar with 'POLICY', 'USR', 'BACK TO PORTAL', and 'NCRB.ORG'. Below this is a search bar with options like 'SEARCH', 'CREATE USR', 'MY LIST', 'REPORTS', 'CREATE WCSTAT FILE', and 'HELP'. The main content area is titled 'SEARCH USR : General Search' and includes several search filters: 'General Search', 'Search By Claim', 'Search By Submission', 'Current View Search', and 'Search By Status'. A list of carriers is shown with checkboxes, and a table of search results is displayed below. The table has columns for Carrier ID, Policy Number, Policy Eff Date, Insured Name, Rpt No, Corr Seq No, Corr Type, Combo ID, Coverage ID, Submission ID, Edit Status, and Web Status. Three records are returned, all with an 'Edit Status' of 'Rejected'.

Carrier ID	Policy Number	Policy Eff Date	Insured Name	Rpt No	Corr Seq No	Corr Type	Combo ID	Coverage ID	Submission ID	Edit Status	Web Status
99996	MUSRTEST4A	05/01/2010	JST POLICY	01	00		6495495	24452880	201207230008	Rejected	
99996	MUSRTEST4A	05/01/2010	JST POLICY	01	01	E	6495495	24452880	201212040001	Rejected	
99998	WITS18658	01/01/2010	WITS 18658	01	00		6495532	24453240	201207260001	Rejected	

The Reject Report will be brought up in a separate window which will allow the user to print the report from this view or Export and Download. The pop up will contain a row of data at the top which displays how many screens are displayed as well as the format the report can be exported. If the user does not want to export, the print button allows a user to print from the popup.

Manage USR - Windows Internet Explorer  
 https://test.ncrb.org/ManageUSR/Pages/ViewReport.aspx

North Carolina Rate Bureau  
 Unit Statistical Error Report - Rejected USRs  
 NCRB TEST CARRIER 2 (99996)

The following USRs have not been processed into our database due to the severity of the errors. The status of the USR is the same as unreported. Please submit the required replacement or correction report.

Submission	Carrier ID	Policy Number	Insured Name	Effective Date	Rpt No.	Corr No.	Claim Number or Exposure Date/Class	Edit No.	Severity	Error Message
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 0063	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9664	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9887	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 0063	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9664	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9887	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00		000514	1	No premium reported for class 9740/9741

## Print USR Reject Report

USRs with an Edit Status of Rejected will display a button labeled "Print Reject Report" within the USR Details. This will allow a user to view and print all errors that were generated from the editing of this USR.

Manage Policy/USR

POLICY USR BACK TO PORTAL NCRB.ORG

SEARCH CREATE USR MY LIST REPORTS CREATE WCSTAT FILE HELP

View USR  
 Processed USR USR 1 of 1 Print

Carrier ID: 99996 Report No.: 01 Received Date: 7/6/2012 Submission ID: 201207230008  
 Policy No.: MUSRTEST4A Corr. Seq. No.: 00 Accepted Date: Combo ID: 6495495  
 Policy Eff. Date: 5/1/2010 Correction Type: Edit Status: Rejected Coverage ID: 24452880

Print Reject Report  
 Download Reject Report

<< Back Add to My List Add to WCSTAT File Correct Replace Modify Save Cancel Delete

Header	Exposure	Loss Info
<b>POLICY INFO</b>		
Carrier ID*	99996	Policy No.* MUSRTEST4A
Report No.*	01	Policy Eff. Date* 5/1/2010
Exposure State	32	Policy Exp. Date* 5/1/2011
Risk ID Number		Correction Type*
Insured's Name*	JST POLICY	
Address		
<b>POLICY CONDITIONS</b>		
3 yr. F/R Policy	<input type="checkbox"/>	Multi State Policy
Retro Policy	<input type="checkbox"/>	Interstate Policy
	<input type="checkbox"/>	Estimated Audit Code* N
	<input type="checkbox"/>	Cancelled Mid-term
	<input type="checkbox"/>	MCO Indicator
<b>POLICY TYPE ID</b>		
Type Coverage	01	Type Of Plan ID 01
Losses Subject To Deductible	00	Type Of Non Standard ID* 01
Basis Of Deductible Calculation	00	Ded Amt Claim/Accident 0
		Ded. Amt Aggregate 0

The edit status is located in the middle column of the Header information.

The Print Reject Report button is located in the Header information on the right hand side of the screen.

The Reject Report will be brought up in a separate window which will allow the user to print the report from this view or Export and Download. The pop up will contain a row of data at the top which displays how many screens are displayed as well as the format the report can be exported. If the user does not want to export, the print button allows a user to print from the popup.

The screenshot shows a web browser window with the URL <https://test.ncrb.org/ManageUSR/Pages/ViewReport.aspx>. The page title is "North Carolina Rate Bureau Unit Statistical Error Report - Rejected USRs" and the subtitle is "NCRB TEST CARRIER 2 (99996)". A message states: "The following USRs have not been processed into our database due to the severity of the errors. The status of the USR is the same as unreported. Please submit the required replacement or correction report." Below this is a table with 11 columns: Submission, Carrier ID, Policy Number, Insured Name, Effective Date, Rpt No., Corr No., Claim Number or Exposure Date/Class, Edit No., Severity, and Error Message. The table contains 7 rows of data, all with "JST POLICY" as the insured name and "05/01/2010" as the effective date. The error messages indicate issues with exposure amounts and premium reporting for various class codes.

Submission	Carrier ID	Policy Number	Insured Name	Effective Date	Rpt No.	Corr No.	Claim Number or Exposure Date/Class	Edit No.	Severity	Error Message
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 0063	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9664	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9887	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 0063	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9664	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9887	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00		000514	1	No premium reported for class 9740/9741

## Download USR Reject Report

USRs with an Edit Status of Rejected will display a button labeled "Download Reject Report" within the USR Details. This will allow a user to download the reject report for the errors that were generated from the editing of this USR.

The screenshot shows the "Manage Policy/USR" interface. At the top, there are navigation tabs for POLICY, USR, BACK TO PORTAL, and NCRB.ORG. Below this is a search bar and a menu with options like CREATE USR, MY LIST, REPORTS, CREATE WCSTAT FILE, and HELP. The main content area is titled "View USR" and shows "Processed USR" with "USR 1 of 1" selected. A "Print" button is visible. The USR details are displayed in a grid format:

- Carrier ID:** 99996
- Report No.:** 01
- Received Date:** 7/6/2012
- Submission ID:** 201207230008
- Policy No.:** MUSRTEST4A
- Corr. Seq. No.:** 00
- Accepted Date:**
- Combo ID:** 6495495
- Policy Eff. Date:** 5/1/2010
- Correction Type:**
- Edit Status:** Rejected
- Coverage ID:** 24452880

Below the details are several buttons: << Back, Add to My List, Add to WCSTAT File, Correct, Replace, Modify, Save, Cancel, and Delete. The "Print Reject Report" and "Download Reject Report" buttons are highlighted. The form below contains fields for "POLICY INFO" (Carrier ID, Policy No., Policy Eff. Date, Policy Exp. Date, Report No., Corr. Seq. No., Exposure State, State Eff. Date, Risk ID Number, Replacement Ind, Insured's Name, Address) and "POLICY CONDITIONS" (3 yr. F/R Policy, Multi State Policy, Interstate Policy, Retro Policy, Canceled Mid-term, MCO Indicator, Estimated Audit Code). The "POLICY TYPE ID" section includes fields for Type Coverage, Type Of Plan ID, Type Of Non Standard ID, Losses Subject To Deductible, Ded Amt Claim/Accident, Ded. Amt Aggregate, and Basis Of Deductible Calculation.

The edit status is located in the middle column of the Header information.

The Download Reject Report button is located in the Header information on the right hand side of the screen under the Print Reject Report button.

This report will be shown in Excel format.

Submission	Carrier ID	Policy Number	Insured Name	Effective Date	Rpt No	Corr No	Claim Number or Exposure Date/Class	Edit No	Severity	Error Message
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 0063	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9664	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9887	000048	2	Exposure amount must be zero for statistical codes.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 0063	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9664	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00	20100701 - 9887	000051	2	Exposure Amount must be zero for this Class Code.
201207230008	99996	MUSRTEST4A	JST POLICY	05/01/2010	01	00		000514	1	No premium reported for class 9740/9741

## Viewing USR Fines Detail Report

For users with access to view the Fines report, a Reports menu item will be available to open the USR Fines Detail Report criteria page. From here users will be able to run a detail report.

**Manage Policy/USR**

POLICY | **USR** | BACK TO PORTAL | NCRB.ORG

SEARCH | CREATE USR | MY LIST | Reports | CREATE WCSTAT FILE | HELP

**USR Fines Detail Report**

Select a company, month and year.

All Carriers  
 DEF Carrier  
 ABC Carrier  
 HIG Carrier

Month\*

Year\*

### USR Fines Detail Report

Coverage ID	Insured Name	Policy Number	Effective Date	RPT No.	CORR No.	USR Status	Fine ID	Reference Date	Fine Amount
23744145	ABC Insured	WC101010101	12/31/01	01	01	Delinquent	7211010	12/31/01	\$50
0101010010	DFE Insured	WC010101101	12/31/03	01	02	Rejected	7311101	12/31/02	\$50

Total: \$100.00

The user must select at least one of the carriers listed in the company box. The Month dropdown field defaults to the previous calendar month and the Year field defaults to the current year with the exception of January of a given year. If the current date is in January, the Month will default to December and the Year will default to the prior year.

When a user clicks the Search button, the report will run placing the results on the screen as seen above. When the Print button is clicked, the results of the search generate a printable report

that can be exported to various formats including Excel, PDF, etc. The Clear All button removes all the criteria in the Search fields.