



**THE WORKERS' COMPENSATION
RATING AND INSPECTION BUREAU**

MA FINANCIAL DATA REPORTING APPLICATION (MAFDRA)

Company User's Guide Effective January 2022

**MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA)
COMPANY USER’S GUIDE**

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MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA) COMPANY USER'S GUIDE

Section I

Effective January 1, 2022

MAFDRA REPORTING TIMELINE

I. MAFDRA REPORTING TIMELINE

Between February and June of each year the WCRIBMA will collect and review Acknowledgement forms and aggregate financial data required by the MA Stat Plan according to the timeline listed below.

***Please note for all calls, if a due date falls on a weekend, then the call will be due on the following Monday**

February 28th

- The Financial Data Call Package Acknowledgement Form (Call Package Acknowledgement) is due.

***All companies authorized to transact MA Workers Comp Ins., are required to submit a Call Package Acknowledgement to the WCRIBMA, even if there is no experience to report. See Section V – Financial Data Call Package Acknowledgement Form of this user's guide.**

February 22nd - May 24th

- Data Operations staff will send reminder notices and overdue notices for calls expected but not yet reported.

March 1st - June 30th

- Data Operations staff will send criticisms to data reporters for all unresolved edits.

March 15th

The following calls are due.

- Call # 2 - Policy Year
- Call # 2a - Policy Year Residual Market
- Call # 2c - Policy Year Large Deductible
- Call # 2d - Policy Year "F" Classification
- Call # 2e - Policy Year Maritime Classification

April 1st

The following calls are due.

- Call # 3 - Accident Year
- Call # 3a - Accident Year Residual Market
- Call # 3c - Accident Year Large Deductible
- Call # 4 - Reconciliation Report
- Call # 5 - Residual Market Direct Written Premium
- Call #5A - Large Deductible Written Calendar Year Experience
- Call # 5B – Net Direct Written Premium

April 15th

The following calls are due.

- Call # 6a - Insurance Expense Exhibit
- Call # 7 - Large Loss & Catastrophe Call

May 15th

- Call # 6 - MA Calendar Year Expense Data.

June 1st

- The Financial Aggregate Acknowledgement Form (6/1 Acknowledgement) is due.

**MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA)
COMPANY USER’S GUIDE**

**Section II
INTRODUCTION**

Effective January 1, 2022

II. INTRODUCTION

This User’s Guide provides assistance to companies with reporting their financial data through the Massachusetts Financial Data Reporting Application (MAFDRA).

DATA OPERATIONS DEPARTMENT

All questions, comments, concerns regarding this users’ guide should be directed to our Data Operations department via e-mail at DataOperations@wcribma.org

MAFDRA

MAFDRA is an on-line reporting application designed to improve the timeliness and quality of data submissions. MAFDRA functions allow data reporters to create, edit and submit financial data calls required in Part II of the approved Massachusetts Workers Compensation Statistical Plan ([MA Stat Plan](#)). Data Reporters will be notified via e-mail of submitted calls with unresolved edit failures.

Data reporters should contact a staff member at the WCRIBMA within the Data Operations department for all questions regarding MAFDRA.

FINANCIAL ACKNOWLEDGEMENT FORMS AND DATA CALLS

The MA Stat Plan currently requires 2 Acknowledgement forms and 15 different data call types (listed below) to be reported through the MAFDRA and provides the reporting requirements for each one.

Call # and Call Name	Due Date
Financial Data Call Package Acknowledgement form	February 28 th
2 - Policy Year Call	March 15 th
2A - Policy Year Residual Market Call	March 15 th
2C - Policy Year Large Deductible Call	March 15 th
2D - Policy Year "F" Classification Call	March 15 th
2E - Policy Year Maritime Call	March 15 th
3 - Accident Year Call	April 1 st
3A - Accident Year Residual Market Call	April 1 st
3C - Accident Year Large Deductible Call	April 1 st
4 - Reconciliation Report	April 1 st
5 – Residual Market Direct Written Premium	April 1 st
5A - Large Deductible Written Calendar Year Experience	April 1 st
5B – Net Direct Written Premium	April 1 st
6 - MA Calendar Year Expense Data	May 15 th
6A - Insurance Expense Exhibit	April 15 th
7 - Large Loss & Catastrophe Call	April 15 th
Aggregate Financial Call Acknowledgement Form (6/1 Acknowledgement)	June 1 st

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Section II INTRODUCTION

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SYSTEM REQUIREMENTS

The following requirements are necessary for access to and navigation through MAFDRA.

DATA REPORTERS REQUIREMENTS:

- o Internet access.
- o A valid e-mail address.
- o Log in MAFDRA at www.mafdra.org.
- o Contact our Data Operations department via e-mail at DataOperations@wcribma.org if experiencing difficulty.

PRIVACY AND SECURITY STATEMENT

To view WCRIBMA's Privacy and Security Statement, data reporters' must click the Privacy and Security Statement link located on the bottom of each screen. To view the SSL Certificate status click on the icon shown below which can be found on the left menu bar, and can be accessed anytime once a company is logged onto the MAFDRA.

[Privacy and Security Statement](#)

MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA) COMPANY USER'S GUIDE

Section III LOGIN

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III. LOGIN

MAFDRA can be accessed via the following link: <https://www.MAFDRA.org> . It can also be accessed via a link on the WCRIBMA's website at www.wcribma.org within the Data Reporting Section on the [Financial Data Reporting page](#).

PRIMARY CONTACT

A Data Operations department staff member will create the initial login information for companies to access MAFDRA. Please refer to Section V- Edit Contact Information of this user's guide for detailed information on maintaining contacts.

PRIMARY CONTACT NO LONGER WITH THE COMPANY

If a company only had one contact person and that person is no longer with the company, contact our Data Operations department at Dataoperations@wcribma.org for assistance.

USER ID(S) AND PASSWORD(S) REQUIREMENTS

For security reasons MAFDRA will prompt data reporters to change their passwords yearly. To change passwords refer to: – **Section V - Edit Contact Information** of this user's guide

- o Username must be at least 12 characters.
- o Password must have:
 - At least one character that is lowercase.
 - At least one character that is uppercase.
 - At least one digit or special character.
 - A length of 12 characters or greater.
- o Usernames and Passwords cannot be the same.

MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA) COMPANY USER'S GUIDE

Section III LOGIN

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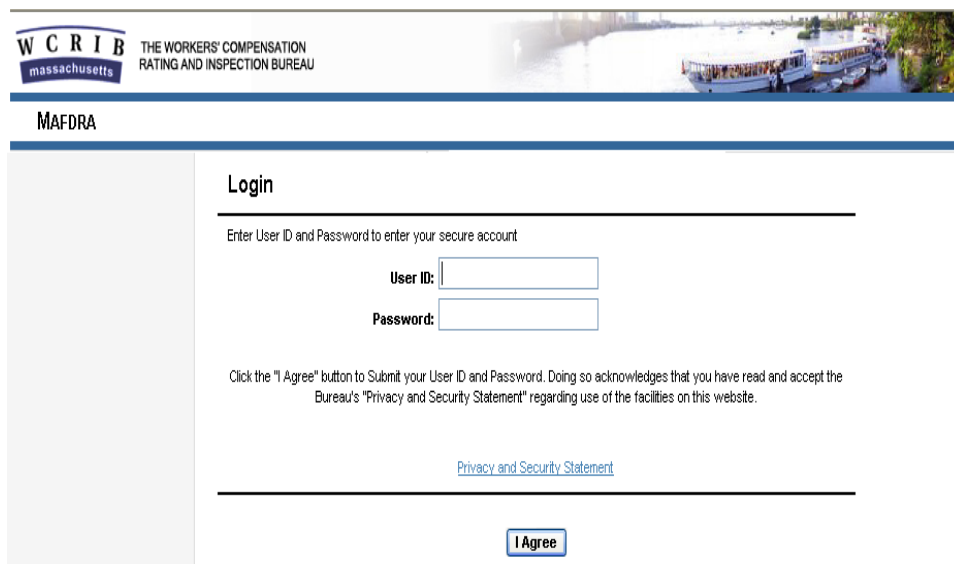
LOGGING INTO MAFDRA

If there is a problem logging into MAFDRA please contact our Data Operations department at Dataoperations@wcribma.org for assistance.

- o All contacts on the Call Package Acknowledgement will be allowed to gain access to MAFDRA simultaneously. If another contact is already logged in, a message will appear stating so.
- o All contacts will be able to view the Call Package Acknowledgement and all calls required for their company. It is the company's responsibility to establish coordination between contacts to avoid duplicate reporting.

1. Enter User ID and Password.

2. Click the **I Agree button to gain access to MAFDRA.**



DISABLE LOGIN

If User ID and/or Password are incorrectly entered three times, the account will be made inactive for one hour.

- o To have the account reactivated prior to one hour; please contact our Data Operations department at Dataoperations@wcribma.org.

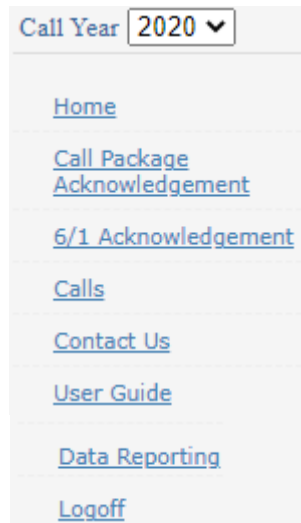
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Section IV MENU ITEMS

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IV. MAFDRA MENU ITEMS

Once a data reporter has successfully logged into MAFDRA using their User ID and Password, the left margin menu will be visible. Below is a brief description of the Menu Items available.

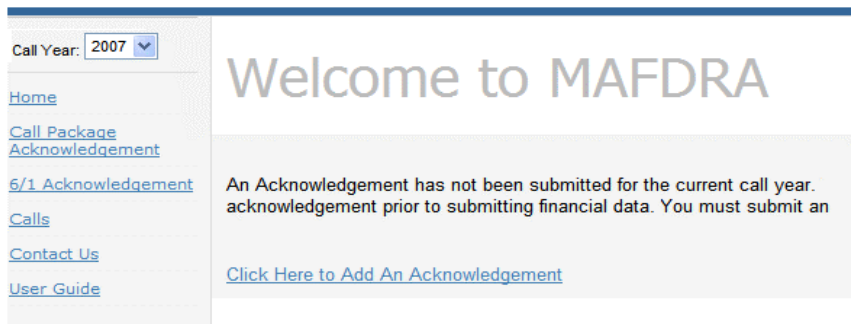


CALL YEAR

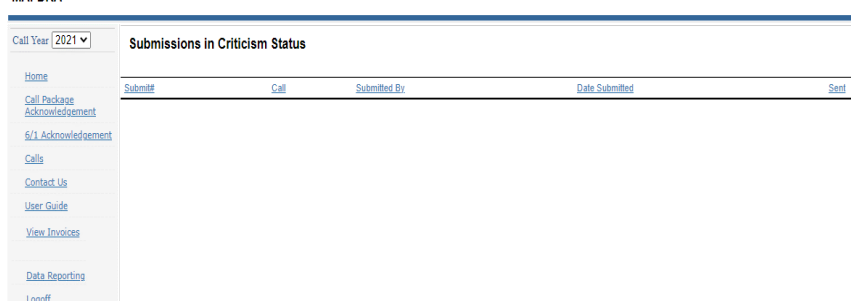
Defaults to the current call year. Data reporters can change the call year by clicking the drop down box and selecting another call year to access historical data. Historical data is available back to call year 2000.

HOME

Prompts data reporters to add a Financial Data Call Package Acknowledgement Form. After an Acknowledgement form has been create, the Home screen converts to a Submissions in Criticism Status screen.



MAFDRA



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**Section IV
MENU ITEMS**

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CALL PACKAGE ACKNOWLEDGEMENT

Provides access to the Financial Data Call Package Acknowledgement Form (Call Package Acknowledgement).

6/1 ACKNOWLEDGEMENT

Provides access to Aggregate Financial Call Acknowledgement Form (6/1 Acknowledgement).

CALLS

Displays the submission status of all financial data calls required by Part II of the Stat Plan.

CONTACT US

Provides e-mail links to the Data Operations and Actuarial staff.

USER GUIDE

Provides access to this MAFDRA Company User's Guide from within the MAFDRA application.

DATA REPORTING

Links to the Data Reporting section of WCRIBMA's website which contains links to financial data reporting resources necessary to report accurate data in a timely manner.

LOGOFF

Terminates a user's current session.

Note: If a user does not use logoff, MAFDRA will give a message on the next login stating that the user is already logged in. The user may continue logging in, however, to avoid that message use logoff when terminating MAFDRA.

MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA) COMPANY USER'S GUIDE

Section V

Effective January 1, 2022 FINANCIAL DATA CALL PACKAGE ACKNOWLEDGEMENT FORM

V. FINANCIAL DATA CALL PACKAGE ACKNOWLEDGEMENT FORM

Every insurance company authorized to transact the business of workers' compensation insurance within the Commonwealth of Massachusetts is required to submit the Financial Data Call Package Acknowledgement Form (Call Package Acknowledgement), even if there is no experience to report.

Data reporters are required to complete Parts I, II and III of the Call Package Acknowledgement and submit it through MAFDRA. However, companies with approved Filing Exemptions (See Part II of the Massachusetts Statistical Plan, Section I General Instructions, B. Cease Writing) need only to complete Parts I and II of the Call Package Acknowledgement.

Note: If a company was previously approved for a filing exemption and no longer meets the requirements for exemption, the data reporter must contact the Data Operations department prior to completing the Call Package Acknowledgement and will be required to complete Parts I, II and III.

CALL PACKAGE ACKNOWLEDGEMENT REPORTING SUMMARY

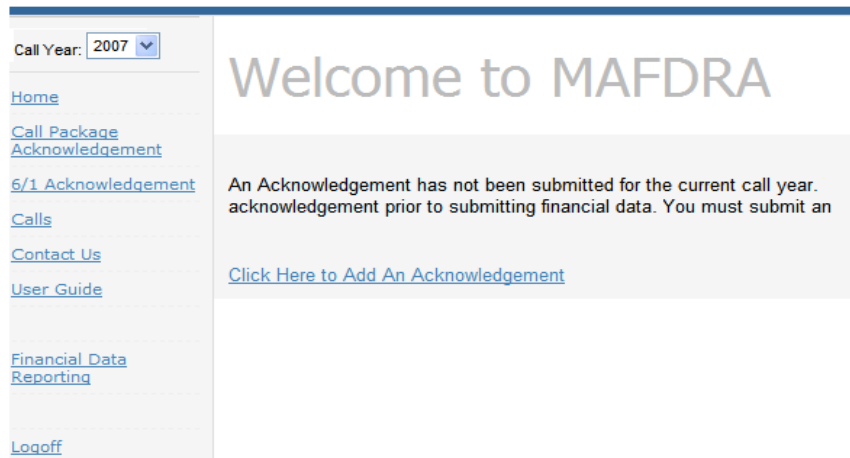
The process for completing the Call Package Acknowledgement can be summarized into the following three categories:

- **Open the form within MAFDRA.**
- **Review/Update Part I - Financial Reporting Group, Part II - Contact, and Part III - Call Package.**
- **Submit completed form via MAFDRA.**

COMPLETING THE CALL PACKAGE ACKNOWLEDGEMENT

At the beginning of each year, the Home screen will prompt data reporters to add a Call Package Acknowledgement for the current call year.

Note: Financial calls cannot be created without first completing the Call Package Acknowledgement.



1. Click on the **Click Here to Add an Acknowledgement** link.
2. Update Part I – Financial Reporting Group (if necessary)

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Section V

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Add 2013 Call Package Acknowledgement

Every insurance company authorized to transact the business of workers' compensation insurance within the Commonwealth of Massachusetts is required to submit an acknowledgment.

I. Carriers currently listed in Financial Reporting Group

Has there been any change to the grouping since last year's call filing? Yes. Please detail below No

- o Data reporters should use this section to report changes in the financial grouping.
- o Data Operations staff will contact the data reporter with any questions regarding a change in Part I - Financial Reporting Group.

1. Click **Yes** if there are changes to the grouping.

2. Type a description of the grouping changes in the box provided.

3. Update Part II – Contacts (if necessary)

II. Contacts currently listed in Financial Reporting Group

[Add Contact](#)

Companies are required to inform the Bureau of any changes to contacts by updating the Call Package Acknowledgement Form. It is very important that staff no longer working with a company or staff no longer responsible for reporting financial data for a company are updated immediately. This action will help to ensure that important Bureau correspondence is delivered to the correct person. See the Financial Data Call Package Acknowledgement Form section of the MAFDRA User's Guide for instructions on updating contacts.

- o This section allows data reporters to Add, Edit, Remove, or Delete contact information.
- o When using the Add, Edit or Remove functions, the Call Package Acknowledgement is automatically saved and cannot be deleted.

Add New Contacts

Data reporters will have the ability to add as many contacts as desired.

- o Contacts added to the Call Package Acknowledgement will only have access to the data for their reporting group.

1. Click the **Add Contact** link.

2. Create a User ID and Password and enter the remaining contact information.

3. Click the **Save** link, a message will appear confirming the Saved status.

4. Newly added contact(s) will appear in Part II of the Call Package Acknowledgement and will have access to MAFDRA.

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Section V

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Edit Contact Information

Data Reporters have the ability to edit contact information.

- o Contact information can be edited/updated at any time.
 1. Click the **Edit** link of the contact name to be updated.
 2. The user screen will appear.
 3. Change the necessary information.
 4. Click the **Save** link, a message will appear confirming the Saved status.

Remove Contact Information

If a data reporter has submitted acknowledgement forms and/or data calls in the past for your company but is no longer required to be a contact, they can be removed from the Acknowledgement form.

- o Removed contact(s) are disabled but will remain in the system (due to being attached to submissions). They will disappear from Section II and Section III of the Call Package Acknowledgement and will no longer have access to MAFDRA.
- o You cannot remove a contact if you used their User ID and Password to log into MAFDRA.
 - You must log in with another contact first.
 - Log in with the new contact information. Afterwards you can proceed to remove the original contact.
- o You will not be able to remove a contact that is designated as the Primary contact. You must first add another contact to be the primary contact. Afterwards you can proceed to delete the contact that was originally designated as the primary.
 1. Click the **Remove** link.
 2. Click **Ok** to remove the contact from the Acknowledgement form.

Delete Contact Information

If a data reporter has never reported an Acknowledgement form or a data call for your company and you no longer want them to show as a contact person you can delete them completely from MAFDRA.

- o Deleted contact(s) are completely removed from the system. They will disappear from Part II and Part III of the Call Package Acknowledgement and will no longer have access to MAFDRA.

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Section V

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- o You cannot delete a contact if you used their User ID and Password to log into MAFDRA. You must log in with another contact first. Or if there aren't any other contacts you must first create a second contact. Log out of MAFDRA and then log in with the new contact information. Afterwards you can proceed to deleting the original contact.
- o You will not be able to delete a contact that is designated as the Primary contact. You must first edit another contact to be the primary. Afterwards you can proceed to delete the contact that was originally designated as the primary.

1. Click the **Edit** link.
2. Click the **Delete** link located on the bottom right of the screen.
3. Click **OK** to delete contact.

4. Update Section III - Call Package

III. Call Package

Review the following call list. Remove check mark from calls in which you have no experience. Change contact next to calls in which the primary contact will not be responsible for submitting data.

Click here to add/remove check from all calls.

If a check mark is removed from a call that is later deemed to actually have experience, timeliness fines may be assessed for overdue call.

Call	Due Date		Contact
2 - Policy Year Call	3/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
2a - Policy Year Residual Market Call	3/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
2c - Policy Year Large Deductible Call	3/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
2d - Policy Year "F" Classification Call	3/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
2e - Policy Year Maritime Call	3/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
3 - Accident Year Call	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
3a - Accident Year Residual Market Call	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
3c - Accident Year Large Deductible Call	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
4 - Reconciliation Report	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
5 - Residual Market Direct Written Premium	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
5a - Large Deductible Company Level Written Premiums	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
5b - Direct Written Premium	4/1/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
6 - Calendar Year Expense Call	5/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
6a - Insurance Expense Exhibit	4/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾
7 - Large Loss & Catastrophe Call	4/15/2014	<input checked="" type="checkbox"/>	Contact, Primary ▾

- o This section allows data reporters to indicate the calls for which their company has experience.
- o This section also allows data reporters to assign a contact for a particular call.
- o For companies that are reporting data to WCRIBMA for the first time, the boxes will display an active checkmark.
- o For companies that have reported data in prior years, the boxes will display a disabled checkmark. Calls submitted in prior years suggest that the call would be required for the current year as well. The exceptions are calls 5 and 7, which will not have a disabled checkmark.
- o Disabled checkmarks cannot to be unchecked.

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Section V

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- o Checkmarks that are not disabled can be unchecked if there is no experience to report for a specific call.
- o The system initially assigns all calls to the Primary contact.
- o The person designated as the contact for a call will receive e-mail notifications from MAFDRA regarding that call. The Primary contact will be cc'd on all e-mail notifications.

1. Click the box next to a call to either remove the checkmark if it is not disabled and your company has no experience or to add a checkmark to a call which has not been reported in prior years and there is now experience.

- o **Once the Call Package Acknowledgement is submitted, a NIL call will automatically be created for all calls without a checkmark.)**
- o **Call # 6A - Insurance Expense Exhibit.**
 - **Remove the checkmark ONLY if your company has already submitted the IEE to the National Association of Insurance Commissioners (NAIC).**
 - **Do not remove the checkmark if your company does not submit the IEE to the NAIC.**

2. Select a Contact for each call that has a checkmark by clicking the drop down box next to the call.

5. Save the Call Package Acknowledgement.

- o After a Call Package Acknowledgment is saved, the Home screen will no longer prompt you to add a new form.
- o You may choose to save changes to the Call Package Acknowledgement until you are ready to submit it to the WCRIBMA.
- o Saved Call Package Acknowledgements can be reopened and updated at any time prior to submitting it.
- o Saved Call Package Acknowledgments are not considered submitted.

1. Click the **Save link at the bottom of the screen to save the acknowledgement form.**

(To reopen a saved Call Package Acknowledgement click the Call Package Acknowledgement link on the menu and then select the Acknowledgement form which has the 'Saved' status.)

MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA) COMPANY USER'S GUIDE

Section V

Effective January 1, 2022 FINANCIAL DATA CALL PACKAGE ACKNOWLEDGEMENT FORM

6. Submit the Call Package Acknowledgement.

- o The Call Package Acknowledgement must be submitted in order to begin to creating calls.
- o The Call Package Acknowledgement is ready to be submitted after completing Parts I, II and III.
- o After submitting a Call Package Acknowledgement, the **Save** link will no longer be available.
- o After a Call Package Acknowledgment is submitted the Home screen will no longer prompt you to add a new form.
- o All changes made to the Call Package Acknowledgement after the initial submission will require a resubmission.

1. Click the **Submit** link at the bottom of the screen to submit the Call Package Acknowledgement.

2. The Call Package Acknowledgement will have a Submitted status.

REVISING A CALL PACKAGE ACKNOWLEDGEMENT

Changes to Parts I, II, and III can still be made to a Call Package Acknowledgement after it has been submitted.

- o To access your submitted form you must go through the **Call Package Acknowledgment** link.
- o After you make changes you must submit the revised form.

1. Click the **Call Package Acknowledgement** link.

2. Click the call package acknowledgement to be updated.

3. Make changes to Parts I, II, and III.

4. Click the **Submit** link at the bottom of the screen to resubmit the Call Package Acknowledgement.

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Section VI
CREATING CALLS

VI. CREATING CALLS

After submitting a Call Package Acknowledgement data reporters will have the ability to view the required calls and corresponding due dates. All calls will have an initial call status of Not Submitted or NIL.

Calls can only be created using approved MAFDRA forms. Forms or spreadsheets created outside of MAFDRA will not be accepted.

DATA CALLS REPORTING SUMMARY

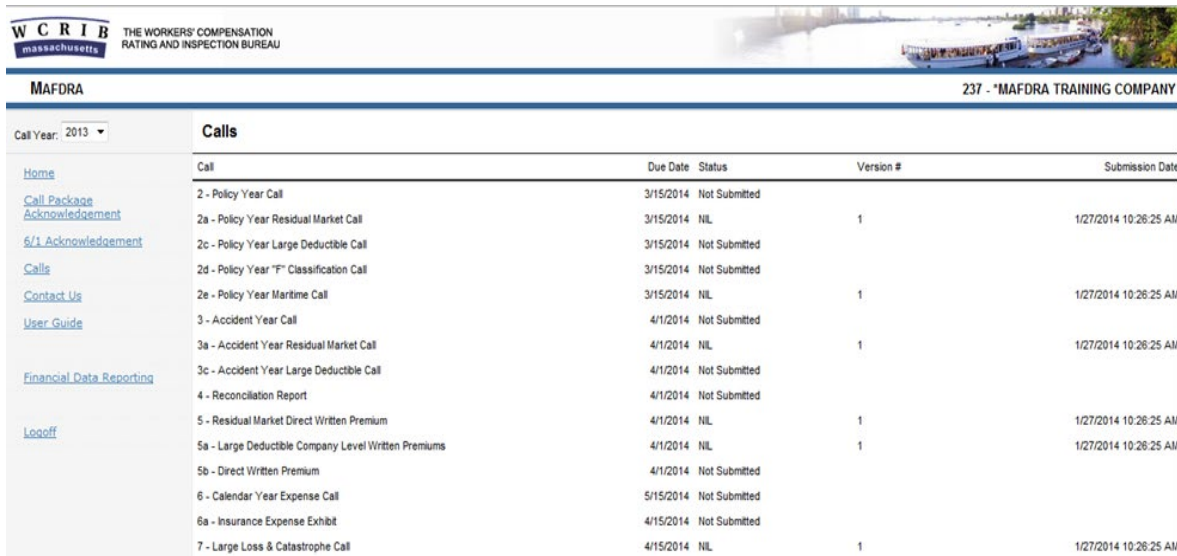
The process for completing data calls can be summarized into the following categories:

- Review the Calls screen to ensure proper Status.
- Open call form (on-screen or an Excel Template).
- Enter data (on-screen or populate an Excel Template(plus upload))
- View Failed Edits
- Submit completed call.

ACCESSING CALLS SCREEN

The Calls screen displays a complete list of all calls required in the current MA Stat Plan.

1. Click the **Calls** link in the Menu Items to view the Calls screen.



The screenshot shows the MAFDRA interface. At the top left is the WCRIB logo (The Workers' Compensation Rating and Inspection Bureau, Massachusetts). The page title is 'MAFDRA' and the user is identified as '237 - *MAFDRA TRAINING COMPANY'. A dropdown menu shows 'Call Year: 2013'. The main content is a table titled 'Calls' with the following columns: Call, Due Date, Status, Version #, and Submission Date. The table lists various call types such as '2 - Policy Year Call', '2a - Policy Year Residual Market Call', etc., all with a status of 'Not Submitted' or 'NIL'.

Call	Due Date	Status	Version #	Submission Date
2 - Policy Year Call	3/15/2014	Not Submitted		
2a - Policy Year Residual Market Call	3/15/2014	NIL	1	1/27/2014 10:26:25 AM
2c - Policy Year Large Deductible Call	3/15/2014	Not Submitted		
2d - Policy Year "F" Classification Call	3/15/2014	Not Submitted		
2e - Policy Year Maritime Call	3/15/2014	NIL	1	1/27/2014 10:26:25 AM
3 - Accident Year Call	4/1/2014	Not Submitted		
3a - Accident Year Residual Market Call	4/1/2014	NIL	1	1/27/2014 10:26:25 AM
3c - Accident Year Large Deductible Call	4/1/2014	Not Submitted		
4 - Reconciliation Report	4/1/2014	Not Submitted		
5 - Residual Market Direct Written Premium	4/1/2014	NIL	1	1/27/2014 10:26:25 AM
5a - Large Deductible Company Level Written Premiums	4/1/2014	NIL	1	1/27/2014 10:26:25 AM
5b - Direct Written Premium	4/1/2014	Not Submitted		
6 - Calendar Year Expense Call	5/15/2014	Not Submitted		
6a - Insurance Expense Exhibit	4/15/2014	Not Submitted		
7 - Large Loss & Catastrophe Call	4/15/2014	NIL	1	1/27/2014 10:26:25 AM

NOT SUBMITTED STATUS

Calls with a check mark, in Part III of the Call Package Acknowledgement, will have a Not Submitted status.

- o Data Operations will expect all calls with a Not Submitted status to be submitted

NIL STATUS

Calls without a check mark, in Part III of the Call Package Acknowledgement, will have a NIL status.

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- o NIL calls indicate that there is no experience to report for a particular call.
- o MAFDRA creates a call with all zeros (0) for calls with a NIL status.
- o Data Reporters will not have the ability to create a call for those with a NIL status.

INCORRECT STATUS

If after submitting the Call Package Acknowledgement, a call displayed with a Not Submitted status is deemed to not have experience (NIL) or if a call with a NIL status is deemed to have experience, you must go back and update the form so that the correct status will display on the Calls screen.

1. Click the **Call Package Acknowledgement** link.
2. Click the **Call Package Acknowledgement to be updated**.
3. Update Part III (check or uncheck calls with incorrect status).
4. Click the **Submit** link at the bottom of the screen to resubmit the **Call Package Acknowledgement**.
5. Return to the Calls screen. The correct call status should now be displayed.

ACCESSING CALL FORMS

Calls can be created using the **New** link or the **Import** link. See the chart below for what options are available for each call required by the MA Stat Plan.

Call # and Call Name	New Link		Import Link
	Onscreen Template	Excel Template	Excel Template
2 - Policy Year Call		X	X
2A – Policy Year Residual Market Call		X	X
2C - Policy Year Large Deductible Call		X	X
2D - Policy Year "F" Classification Call		X	X
2E - Policy Year Maritime Call		X	X
3 - Accident Year Call		X	X
3A – Accident Year Residual Market Call		X	X
3C - Accident Year Large Deductible Call		X	X
4 - Reconciliation Report	X		
5 - Residual Market Direct Written Premium	X		
5A - Large Deductible Written Calendar Year Experience	X		

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Call # and Call Name	New Link		Import Link
	Onscreen Template	Excel Template	Excel Template
5B – Net Direct Written Premium	X		
6 - MA Calendar Year Expense Data	X		
6A - Insurance Expense Exhibit			
7 - Large Loss & Catastrophe Call			X

NEW LINK

The New link is available for all calls except call 7.

- o **Onscreen Template** - (Call 4, 5, 5A, 5B, 6) using a template within MAFDRA.
 - Call # 4 will pre-populate with data submitted from Call's # 2 and 3.
 - Call # 5, 5A, and 6 will initially be pre-populated with prior call year call data (if any).
 - Call # 5B does not pre-populate with any data. It is a blank form.
 - Call # 6A has does not have on onscreen template.

- o **Excel Template** - (Call 2, 2A, 2C, 2D, 2E, 3, 3A, 3C) using an approved template outside MAFDRA, and then subsequently uploading the completed spreadsheet into MAFDRA.
 - For the current year calls, the excel template will initially be pre-populated with last year's submitted call data.
 - For any given call year the excel template will be pre-populated with the data from the latest version for that call year.

NEW LINK - ON SCREEN TEMPLATE- DATA ENTRY

For Call's 4, 5, 5A, 5B, 6 cells formatted in bolded **red** text cannot be overwritten.

Opening On-Screen Template

On-screen templates can only be accessed from the Submission Status screen.

- 1. Click on a call. The Submission Status screen will open.**
- 2. Click in the **red** link**
- 3. The on-screen call will be displayed.**

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Entering Data On-Screen Template

Data reporters must copy or enter data into the template.

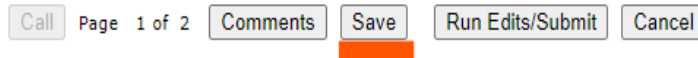
1. **Key data in the appropriate cells or copy data from another source and paste it into the correct cells.**
2. **Use the scrolls bars to scroll down and across the screen to complete the entire form.**

Note: To cancel the call from being created, click the Cancel button to return to the Submission Status screen.

Saving On-Screen Data Calls

Saving a call allows the data reporter to go back to the call later for more updating prior to submitting.

1. **Click the Save button.**



Policy Year	Residual Market (1)	VDAR (including "F" Classification and Maritime Experience) (2)
Prior to 2017	<input type="text" value="0"/>	<input type="text" value="0"/>
2017	<input type="text" value="0"/>	<input type="text" value="0"/>
2018	<input type="text" value="0"/>	<input type="text" value="0"/>
2019	<input type="text" value="0"/>	<input type="text" value="0"/>
2020	<input type="text" value="87878"/>	<input type="text" value="0"/>
2021	<input type="text" value="8786868"/>	<input type="text" value="999909"/>
Total	<input type="text" value="0"/>	<input type="text" value="0"/>

2. **The Submission Status screen will appear.**

Revising Saved On-Screen Data Calls

For calls with on-screen data entry (Call's 4, 5, 5A, 5B, 6) the saved call can be revised prior to being submitted.

1. **Open the saved calls.**
2. **Make changes to the data.**
3. **Click the Save button.**
4. **The Submission Status screen will appear.**

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Deleting On-Screen Saved Data Calls

Saved calls can be deleted by the data reporter.

1. To delete a saved call, go back to the Submission Status screen.
2. Click the **Delete** link next to the call.
3. A message asking, 'Are you sure you want to delete?' will appear.
4. Click **OK**.

Adding Comments On-Screen Calls

Comments are to be used for general messages only.

- o Comments should not be used for edit explanations. Edits must be explained within the Failed Edit screen on an edit level.
 1. Click the **Comments** button.
 2. Type a message.
 3. Click the **Save** button.

Submit On-Screen Data Calls

After entering data and comments for the call, you may begin the Submission process. Calls cannot be submitted to the WCRIBMA without viewing failed edits first.

1. Click the **Run Edit/Submit** button. Selecting this button will allow the Data Reporter to view failed edits.
2. Review edits using the guidelines in the [VIEW FAILED EDITS](#) section of this guide.
3. After edits have been reviewed the call can be submitted using the **Submit** button on the Failed Edits screen. See the [SUBMITTING CALLS](#) section of this guide for more details.

NEW LINK - EXCEL SPREADSHEET DATA ENTRY

For Call's 2, 2A, 2C, 2D, 2E, 3, 3A and 3C. Calculated cells are formatted in bolded red text and cannot be overwritten.

Opening Excel Template

Approved templates can only be accessed from the Submission Status screen.

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1. From the Calls screen, click the call you want to work with to enter the Submission Status screen.
2. Click the **New** link on the Submission Status screen to download an excel template.

Entering Data in Excel Template

Data can be keyed or pasted into a selected cell on the template.

1. Open the downloaded template.
2. Key data in the appropriate cells or copy data from another source and paste it into the correct cells.
3. Use the scrolls bars to scroll down and across the screen to complete the entire form.
4. Excel templates will always default to the call year selected on the Call Year menu. The year on the template cannot be changed to a prior year by typing the four digit's year in Cell B2 of each template.
5. Templates may contain protected cells that cannot be overwritten.
6. Calculated cells are formatted in bolded **Red** font and cannot be overwritten.
7. When done with data entry save the spreadsheet to a location on your PC.

Upload Completed Template

Uploaded calls are automatically saved. They are not submitted.

1. From the Calls screen, click the call you want to work with to enter the Submission Status screen.
2. Click the Import link.
3. To upload a completed template, follow the instructions on the Import Call screen.
 - i. If an error had occurred while uploading the file, a message in **red** text will be displayed on the Import Call screen. Refer to the [Troubleshooting](#) section of this guide for possible solutions.
4. The saved call will appear on the Calls Submission Status screen.

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Revising Uploaded Calls

Data reporters cannot make changes onscreen for the calls that were created on excel templates. They have to make changes to the saved Excel spreadsheet and then re-import the completed spreadsheet.

1. **Make changes on the same spreadsheet.**
2. **When done making the changes, save the spreadsheet.**
3. **Follow the steps to Upload Completed Template.**

Deleting Uploaded Saved Calls

Saved calls can be deleted by the data reporter.

1. **To delete a saved call go back to the Submission Status screen.**
2. **Click the **Delete** link next to the call.**
3. **A message asking, ‘Are you sure you want to delete?’ will appear.**
4. **Click **OK**.**

Adding Comments To Uploaded Calls

Comments are to be used for general messages only.

- o Comments should not be used for edit explanations. Edits must be explained within the Failed Edit screen on an edit level.
 1. **To add comments to a call after an upload click the **Comments** button.**
 2. **Type a message.**
 3. **Click the **Save Comment** button.**

Submitting Uploaded Calls

After uploading a call and entering comments, you may begin the Submission process by clicking the **Failed Edits** button. Calls cannot be submitted to the WCRIBMA without viewing failed edits first.

1. **Click the **Failed Edits** button. Selecting this button will allow the data reporter to view failed edits.**
2. **Review edits using the guidelines in the [VIEW FAILED EDITS](#) section of this guide.**

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3. After edits have been reviewed the call can be submitted using the **Submit** button on the Failed Edit screen. See the [SUBMITTING CALLS](#) section of this guide for more details.

IMPORT LINK

The **Import** link is only available for calls with downloadable Excel templates.(Call's 2, 2A, 2C, 2D, 2E, 3, 3A, 3C and 7). Data reporters are able to download an approved call template on a blank excel spreadsheet, enter the data and then subsequently upload the completed spreadsheet into MAFDRA.

- o Excel templates will not be pre-populated with data submitted in the prior call years or data submitted on a previous submitted call for the same call year.
- o On the Import Call screen, the Call Type will be defaulted to the call selected on the Submission Status screen.
- o On the Import Call screen, the Call Type can be changed by clicking the drop down box and selecting the call type needed.
- o Downloaded Excel templates will always default to the current call year that it was selected in the Call Year menu. The year on the template cannot be changed to a prior year by typing the four-digit year in Cell B2 of each template.
- o Templates may contain protected cells that cannot be overwritten.
- o Calculated cells are formatted in bolded **Red** font and cannot be overwritten.

IMPORT LINK - EXCEL SPREADSHEET – DATA ENTRY

The import link is available for Call 2, 2A, 2C, 2D, 2E, 3, 3A, 3C and 7

Download Template

Approved Excel templates can only be downloaded from MAFDRA.

1. From the Calls screen, click the call you want to work with to enter the Submission Status screen.
2. Click the **Import** link on the Submission Status screen to begin the importing data function.
3. To download a template, follow the instructions on the Import Call screen.

Import Call

Select Call Type
2 - Policy Year Call

Calls using approved template formats can be uploaded to this on-line application.

To download a version of this call's approved template to your pc:

1. Click link below:
[2 - POLICY YEAR CALL TEMPLATE](#)
2. Open template and then save it to a location on your p.c.
3. Close template when you are done entering data.

To upload completed approved template directly to this on-line application:

1. Click Browse...
2. Select the file to be imported.
3. Click Open.
4. Click Upload. The call will be uploaded and stored as a saved file.

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Entering Data On Template

Data can be keyed or pasted into a selected cell on the template.

1. **Key data in appropriate cells or copy data from another source and paste it into selected cells on the spreadsheet. (Note: When copying and pasting data, selecting an entire row or column is not allowed, data can only be pasted by selecting the exact cells.)**
2. **Use the scroll bar to scroll down and across the template to complete all rows and columns.**
3. **Excel templates will always default to the call year selected on the Call Year menu. The year on the template cannot be changed to a prior year by typing the four digit's year in Cell B2 of each template.**
4. **Templates may contain protected cells that cannot be overwritten.**
5. **Calculated cells are formatted in bolded Red font and cannot be overwritten.**
6. **When done with data entry save the spreadsheet to a location on your PC.**

Upload Completed Template

Uploaded calls are automatically saved. They are not submitted.

1. **From the Calls screen, click the call you want to work with to enter the Submission Status screen.**
2. **Click the Import link.**
3. **To upload a completed template, follow the instructions on the Import Call screen.**

Note: If an error had occurred while uploading the file, a message in red text will be displayed on the Import Call screen. Refer to the Troubleshooting section of this guide for possible solutions.

4. **After choose a call and click Upload, the call is automatically saved. Click calls, the saved call appear.**

Revising Uploaded Calls

Data reporters cannot make changes onscreen for the calls that were created on excel templates. They have to make changes to the saved Excel spreadsheet and then re-import the completed spreadsheet.

1. **Make changes on the spreadsheet.**

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2. When done making the changes, save the spreadsheet.
3. Follow the steps to Upload Completed Template

Deleting Uploaded Saved Calls

Saved calls can be deleted by the data reporter.

1. To delete a saved call go back to the Submission Status screen.
2. Click the **Delete** link next to the call.
3. A message asking, 'Are you sure you want to delete?' will appear.
4. Click **OK**.

Adding Comments To Uploaded Calls

Comments are to be used for general messages only.

- o Comments should not be used for edit explanations. Edits must be explained within the Failed Edit screen on an edit level.
1. To add comments to a call after an upload click the **Comments** button.
 2. Type a message.
 3. Click the **Save** button.

Submitting Uploaded Calls

After uploading a call and entering comments, you may begin the Submission process by clicking the **Failed Edits** button. Calls cannot be submitted to the WCRIBMA without viewing failed edits first.

1. Click the **Failed Edits** button. Selecting this button will allow the data reporter to view failed edits.
2. Review edits using the guidelines in the [VIEW FAILED EDITS](#) section of this guide
3. After edits have been reviewed the call can be submitted using the **Submit** button on the Failed Edit screen. See the [SUBMITTING CALLS](#) section of this guide for more details.

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**Section VII
RUN EDITS/SUBMIT**

VII. FAILED EDITS

MAFDRA requires data reporters to view failed Finable Basic and Actuarial edits on their data prior to submission. **Refer to MA Stat Plan Part II for a listing of edits.**

- o Data for comparison edits will only run on calls with a Submitted status. (MAFDRA will not pull in data from a Saved call for comparison edits.)
- o MAFDRA allows data reporters the ability to add explanations via edit notes.
- o Accessing failed edits to a call being worked with can be accomplished by:

Run Edit/Submit button

- o **Onscreen Templates** for Call 4, 5, 5A, 5B, 6 will initially display a Run Edit/Submit button.

Failed Edits Link

- o **Excel Templates** for Call 2, 2A, 2C, 2D, 2E, 3, 3A, 3C and 7 will display a Failed Edits link.
- o **Onscreen Templates** for Call 4, 5, 5A, 5B, 6 will display a Failed Edits link after a call has been submitted. (The Run Edit/Submit button will not be displayed on Submitted calls)

RUN EDIT/SUBMIT BUTTON

Run Edits/Submit button appears on the data entry screen after clicking the **New** link. The button will also be available on the screen after a call has been saved.

Call Page 1 of 2 Comments Save Run Edits/Submit Cancel

Policy Year	Residual Market (1)	VDAR (including "F" Classification and Maritime Experience) (2)
Prior to 2017	<input type="text" value="0"/>	<input type="text" value="0"/>
2017	<input type="text" value="10000"/>	<input type="text" value="0"/>
2018	<input type="text" value="0"/>	<input type="text" value="0"/>
2019	<input type="text" value="30000"/>	<input type="text" value="0"/>
2020	<input type="text" value="0"/>	<input type="text" value="0"/>
2021	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	<input type="text" value="40000"/>	<input type="text" value="0"/>

1. Click the **Run Edits/Submit** button. You will be taken to the Failed Edits screen.

Comparison Calls Submit No Status Submitted View All Calls
 2020 5 - Residual Market Direct Written Premium 1 Submitted 1/14/2022 8:40:19 AM

Actuarial Edit 5.1 - 2021 - Column 2 - VDAR Written (8787) should be less than or equal to Column 1 Residual Market Written (760) Add Note

Submit

2. Review edits (if any) displayed on the Submit Call - Failed Edits Listing.
3. The **Add Note** button appears next to each edit and can be clicked on at any time to add an explanation next to an edit. See [ADDING NOTES](#) for more details.
4. A **Submit** button appears at the bottom of the screen and can be clicked on any time the call is ready to be submitted. See the [SUBMITTING CALLS](#) section of this guide for more details.

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RUN EDITS/SUBMIT

FAILED EDITS LINK

FAILED EDITS link appears on an uploaded excel template. It also appears on ALL calls after a call has been submitted.

Line	Report Level	Policy Year Being Valued	(1) Standard at Bureau Designated Statistical Reporting Level	(2) Standard At Company Level	(3) Net Premium	(4) Indemnity Paid	(5) Medical Paid	(6) Indemnity Case	(7) Medical Case	(8) Total Paid (4)+(5)	(9) Total Case Reserves (6)+(7)	(10) Incurred Losses (8)+
A.	All Prior Combined	Prior to 2001	0	0	0	0	0	0	0	0	0	0

1. Click the **Failed Edits** link. You will be taken to the Failed Edits screen.

Comparison Calls	Submit No	Status	Submitted	View All Calls
2020 5 - Residual Market Direct Written Premium 1		Submitted	1/14/2022 8:40:19 AM	

Actuarial Edit 5.1 - 2021 - Column 2 - VDAR Written (8787) should be less than or equal to Column 1 Residual Market Written (760)

Submit

2. Review edits (if any) displayed on the Submit Call - Failed Edits Listing. See [FIXING INCORRECT DATA](#) for details on fixing incorrectly entered data.
3. The **Add Note** button appears next to each edit and can be clicked on at any time to add an explanation next to an edit. See [EDIT NOTES](#) for more details.
4. A **Submit** button appears at the bottom of the screen and can be clicked on any time the call is ready to be submitted. See the [SUBMITTING CALLS](#) section of this guide for more details.

FIXING INCORRECT DATA

If the failed edits listing reveals incorrectly reported data, you can revise the data.

ONSCREEN DATA ENTRY

Calls (4, 5, 5A, 5B and 6)

1. Close the Failed Edit Screen. You will be taken to the Submission Status screen.
2. Open the saved call.
3. Enter your corrected data.
4. Run edits as described in the above sections.

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Section VII
RUN EDITS/SUBMIT

EXCEL TEMPLATE

Calls (2, 2A, 2C, 2D, 2E, 3, 3A, 3C and 7)

1. Open the uploaded call saved on your computer.
2. Change the incorrect data on the Excel spreadsheet and save it.
3. Upload the corrected spreadsheet.
4. Run edits as described in the above sections.

EDIT NOTES

Failed edits not associated with incorrect data must have an adequate explanation in the Edit Note section. (Explanations for Basic & Actuarial edit failures should not be included in the Comment section.)

- o All Basic & Actuarial edit failures must have an explanation prior to being submitted to the WCRIBMA.
- o Edit note text cannot be greater than 255 characters. More than 255 characters should be sent via email.

ADDING EDIT NOTES

1. Click the **Add Note** button.
2. Enter the explanation for the failed edit.
3. To cancel the edit note, click the **Cancel** link.
4. To save the edit note click the **Save** link.

DELETING EDIT NOTES

Edit notes can be deleted on a saved calls only.

1. Click the **Delete** button located under the note.

CHANGING EDIT NOTES

Edit notes can be changed or amended on saved calls only. Edit notes cannot be changed or amended on submitted calls

1. Click the **Edit** button located under the note.
2. Type your change.
3. Click **Save**.

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**Section VIII
SUBMITTING CALLS**

VIII. SUBMITTING CALLS

After all valid failed edits have been addressed, the call can be submitted to the WCRIBMA.

SUBMIT BUTTON

The Submit button will only appear after you have run edits using the Run Edits/Submit button or the Failed Edits link.

- o Data reporters should review edits, fix incorrect data, and provide edit explanations prior to submitting a call to avoid fines associated with the Data Quality Compliance Programs outlined in Part V of the MA Stat Plan.
- o Data Operations' staff will review all Submitted calls.
- o All unresolved edit failures will be communicated to the designated data reporter in Part III of your Call Package Acknowledgement. The primary contact will be cc'd on all communications.

1. Click the **Submit** button that appears on the Failed Edit screen.
2. Click **OK** to submit the call.
3. A 'Submitted Successfully' confirmation message will appear.
4. Click **OK** to continue. The status for this call will now show Submitted on the Calls and Submission Status screens.

Calls Screen

Call	Due Date	Status	Version #	Submission Date
2 - Policy Year Call	3/15/2014	Submitted	1	1/27/2014 10:50:14 AM
2a - Policy Year Residual Market Call	3/15/2014	NL	1	1/27/2014 10:26:25 AM
2c - Policy Year Large Deductible Call	3/15/2014	Not Submitted		
2d - Policy Year "F" Classification Call	3/15/2014	Not Submitted		
2e - Policy Year Maritime Call	3/15/2014	NL	1	1/27/2014 10:26:25 AM
3 - Accident Year Call	4/1/2014	Submitted	1	1/27/2014 10:49:37 AM
3a - Accident Year Residual Market Call	4/1/2014	NL	1	1/27/2014 10:26:25 AM
3c - Accident Year Large Deductible Call	4/1/2014	Not Submitted		
4 - Reconciliation Report	4/1/2014	Not Submitted		
5 - Residual Market Direct Written Premium	4/1/2014	NL	1	1/27/2014 10:26:25 AM
5a - Large Deductible Company Level Written Premiums	4/1/2014	NL	1	1/27/2014 10:26:25 AM
5b - Direct Written Premium	4/1/2014	Not Submitted		
6 - Calendar Year Expense Call	5/15/2014	Not Submitted		
6a - Insurance Expense Exhibit	4/15/2014	Not Submitted		
7 - Large Loss & Catastrophe Call	4/15/2014	NL	1	1/27/2014 10:26:25 AM

Submission Status Screen

Sub No.	Review Status	Submitted By	Date Submitted
1	Submitted	Contact, Primary	11/17/2006 10:38:36 AM

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**Section VIII
SUBMITTING CALLS**

REVISING SUBMITTED CALLS

Incorrectly reported data can be revised anytime by resubmitting a call.

- o In order to revise a submitted call, data reporters will need to create a new call following the steps within Section VI - Creating Calls of this user's guide. (See New link or Import link)
- o When correcting a call using the **New** link, MAFDRA will pre-populate the form with data from the previous submitted call within the same call year.
- o When correcting a call using the **Import** link, MAFDRA will display a blank template. Excel templates will not be pre-populated with data submitted on a previous submitted call for the same call year.
- o Prior Year Calls – revisions to prior year calls can also be submitted.
 - To correct a prior year call using the **New link**, data reporters must select the Call Year to be revised first, and then open a new form.
 - To correct a prior year call using the **Import link**, data reporters must select the Call Year to be revised first, download the template

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Section IX CRITICISMS

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IX. CRITICISMS

Once a Call Package Acknowledgement has been submitted, the Home screen converts to a Criticism Status screen. The Criticism Status screen will display a list of calls with a Criticism status.

Basic & Actuarial edits which have not been resolved must be addressed within the established timeframe listed on the criticism otherwise fines may apply.

SUBMISSIONS IN CRITICISM SCREEN

This screen will alert data reporters of all submitted calls, reviewed by Data Operations staff which contains unresolved failed edits.

Submissions in Criticism Status				
Submit#	Call	Submitted By	Date Submitted	Sent
1	2 - Policy Year Call	Acosta, Jessica	2/28/2022	2/28/2022

- o Criticisms are e-mailed to the contact designated for that call and the Primary contact for the group.
- o The Calls screen and the Submission Status screen will show a status of Criticism, formatted in bolded **red** font, to alert the data reporter.

Calls Screen

Calls				
Call	Due Date	Status	Version #	Submission Date
2 - Policy Year Call	3/15/2014	Criticism	1	1/27/2014 10:50:14 AM
2a - Policy Year Residual Market Call	3/15/2014	NIL	1	1/27/2014 10:26:25 AM
2c - Policy Year Large Deductible Call	3/15/2014	Not Submitted		
2d - Policy Year "F" Classification Call	3/15/2014	Not Submitted		
2e - Policy Year Maritime Call	3/15/2014	NIL	1	1/27/2014 10:26:25 AM
3 - Accident Year Call	4/1/2014	Submitted	1	1/27/2014 10:49:37 AM
3a - Accident Year Residual Market Call	4/1/2014	NIL	1	1/27/2014 10:26:25 AM
3c - Accident Year Large Deductible Call	4/1/2014	Not Submitted		
4 - Reconciliation Report	4/1/2014	Not Submitted		
5 - Residual Market Direct Written Premium	4/1/2014	NIL	1	1/27/2014 10:26:25 AM
5a - Large Deductible Company Level Written Premiums	4/1/2014	NIL	1	1/27/2014 10:26:25 AM
5b - Direct Written Premium	4/1/2014	Not Submitted		
6 - Calendar Year Expense Call	5/15/2014	Not Submitted		
6a - Insurance Expense Exhibit	4/15/2014	Not Submitted		
7 - Large Loss & Catastrophe Call	4/15/2014	NIL	1	1/27/2014 10:26:25 AM

Submission Status Screen

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ACCESSING A CRITICISM

Criticisms can be viewed at any time.

- o Criticisms can be accessed from the Criticism Status screen or from within the call.

FROM CRITICISM STATUS SCREEN

The Criticism Status screen is the home page after an Acknowledgement form has been submitted.

- o This screen can be accessed at any time.

1. Click the call with a Criticism status on the Criticism Status screen, the call will appear.
2. Go to Failed Edits and the Criticism will be displayed.

FROM WITHIN A CALL

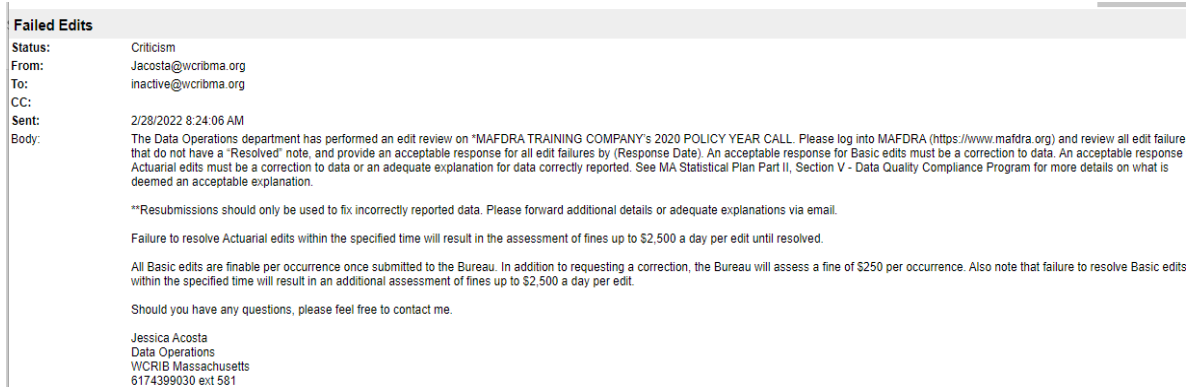
Criticisms sent by Data Operations staff to a data reporter can be accessed through the Failed Edits link within the call.

- o The Failed Edits link screen can be accessed at any time.

1. From the Submission Status screen click the call. The data call will be displayed.
2. Click the **Failed Edits** links. The Criticism screen will be displayed.

PART I OF CRITICISM

The first half of the criticism displays criticism information.



- o The following information appears in the first half:

Status - Status of call.

From - Data Operations staff that sent the criticism.

To – The designated contact assigned for a particular call.

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CC – Primary contact will be cc'd on all criticisms sent.

Sent - Date e-mail was sent.

Body - Text included in the original e-mail sent to data reporters.

PART II OF CRITICISM

The second half of the criticism displays the failed edit listing.

FAILED EDIT LISTING			
Comparison Calls	Submit No	Status	Submitted
2006 2 - Policy Year Call	2	Submitted	2/12/2008 10:45:58 AM
2007 3 - Accident Year Call	1	Under Review	2/12/2008 10:44:38 AM
Finable Basic Edit 2.12 - 2004 - (4) Indemnity Paid [546554] and/or (8) Indemnity Case [0] are reported, therefore (14) Accumulated Closed [0] and/or (15) Open Outstanding Incurred Indemnity Claim Count [0] must be reported.			Revision Required
Actuarial Edit 2.14 - 2004 - Indemnity and Medical (Paid + Case) Losses [546554] are reported, therefore Accumulated Policy Year Defense and Cost Containment Expenses [0] should be reported.			Adequate Response Required
Actuarial Edit 2.15 - Line X - (4) Indemnity Paid - Policy Year Call [546554] should equal (1) Indemnity Paid - Accident Year Call [0].			Resolved By Other
Actuarial Edit 2.15 - Line Z - (4) Indemnity Paid - Policy Year Call [546554] should equal (1) Indemnity Paid - Accident Year Call [0].			Further Detail Required
Added By: Shameatha Sheppard Submission #: 2 DateAdded: 2/12/2008 11:01:35 AM			
Please provide Claim & Policy Numbers.			
Actuarial Edit 2.15 - Line X - (18) DCC IBNR - Policy Year Call [87987] should equal (15) DCC IBNR - Accident Year Call [0].			Resolved By Call Note
Added By: Cupid Valentines Submission #: 2 DateAdded: 2/12/2008 10:58:38 AM			
Testing Edit Notes.			

o The following information appears in the second half:

- 1. Comparison Calls (Lists the calls used for comparison edits).**
- 2. List of failed edits (Refer MA Stat Plan Part II for a listing of edits).**
- 3. Edit Description - Each edit will contain the following description.**
 - a) Edit Type** - Finable Basic Edit or Actuarial Edit.
 - b) Edit Number** - The number assigned to a particular edit.
 - c) Year** (if applicable) - The Accident/Policy Year failed.
 - d) Line** (if applicable) - The line failed.
 - e) Edit Text** – A description of the edit failure with details.

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4. Edit Status - Each edit will have one of the following statuses displayed next to it.

- a) **Resolved by Call Note** - An adequate response was submitted with the call as an edit note.
- b) **Resolved by Email** - Data Operations received an adequate response from the company via e-mail.
- c) **Resolved by Other** - Data Operations received an adequate explanation other than an edit note or e-mail (fax, regular mail).
- d) **Resolved** – A revision was provided on a subsequent submission to fix incorrect data.
- e) **Adequate Response Required** - Company must submit an adequate response. (See Data Operation's note attached to edit).
- f) **Further Detail Required** - Data Operations staff requests additional detail from the Company. (See Data Operation's note attached to edit.)
- g) **Revision Required** - Companies are required to provide a revision to fix incorrect data.

RESPONDING TO A CRITICISM

Data reporters must provide an adequate response to the criticism within the established time frames (Requested Response Date).

- o An acceptable explanation must describe, to the satisfaction of the Data Operations and the Actuarial Department, the circumstance that caused the anomaly or the data must be corrected.
- o Edits not resolved by the Requested Response Date will incur fines associated with the Data Quality Compliance Programs outlined in Part V of the MA Stat Plan.
 - 1. Resubmit the call only to fix incorrect data that corresponds to edits that do not have a resolved status.
 - 2. If data is correct as reported, forward additional details or adequate explanations via e-mail to the Data Operations staff assigned to review your company's data.
 - 3. If data was incorrectly reported on a data call and your company was also asked to provide more details or an adequate explanation, the data reporter must fix incorrectly reported data on the data call via a resubmission and add the additional details or an adequate explanation using the **Add Edit Note** function.
 - 4. Please note Data Operations strongly discourage the resubmission of calls for the sole reason of providing additional details or adequate explanations for an edit failure. Resubmissions should only be used to fix incorrectly reported data.

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Section X

Effective January 1, 2022 AGGREGATE FINANCIAL CALL ACKNOWLEDGEMENT FORM

X. AGGREGATE FINANCIAL CALL ACKNOWLEDGEMENT FORM

All insurance companies reporting aggregate financial data to WCRIBMA are required to submit the Aggregate Financial Call Acknowledgement Form (6/1 Acknowledgement). This form must be completed and then uploaded into MAFDRA.

6/1 ACKNOWLEDGEMENT REPORTING SUMMARY

The process for completing the Call 6/1 Acknowledgement can be summarized into the following three categories:

- **Download Form from MAFDRA.**
- **Complete** the form.
- **Scan/Upload** completed form into MAFDRA.

MAFDRA 237 - *MAFDRA TRAINING COMPANY

Call Year 2021

Home
Call Package Acknowledgement
6/1 Acknowledgement
Calls
Contact Us
User Guide
View Invoices
Data Reporting
Logoff

Upload 6/1 Acknowledgement Form

To Download the Aggregate Financial Call Acknowledgement Form to your computer:

1. Click [Download 6/1 Acknowledgement Form](#)
2. Open PDF File.
3. Print and complete the form.
4. Scan Page 2 of the completed form and save it to a location on your computer.

Since carriers may accrue fines for inappropriate signatures, the MA Bureau strongly recommends that forms are reviewed carefully prior to uploading. See Part II, Section III of the MA Stat Plan for details.

To upload completed approved form directly to this online application:

5. Click browse...
6. Select the PDF or Text file to be uploaded.
7. Click Open.
8. Click the Upload button. The 6/1 Acknowledgement Form will be uploaded.

*Accepted file formats are PDF and TXT, files cannot exceed 4MB.

Choose File No file chosen

Upload

Submitted 6/1 Acknowledgement Forms

Click the View Link below.

Submitted File	Submit No.	User Name	Status	Date Added
View	3	ming zhang	Submitted	4/14/2022 10:46:21 AM
View	2	ming zhang	Submitted	4/14/2022 10:41:43 AM
View	1	ming zhang	Submitted	4/14/2022 10:40:00 AM

ACCESSING THE 6/1 ACKNOWLEDGEMENT

The 6/1 Acknowledgement is separate and distinct from the Call Package Acknowledgement in [Section V](#) of this document. Refer to Part II, Section III of the MA Stat Plan for details.

DOWNLOAD 6/1 ACKNOWLEDGEMENT

The approved form can only be downloaded from MAFDRA.

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1. Click the Download **6/1 Acknowledgement Form** link located in the menu items.
2. Follow the instructions for downloading a form on the 6/1 Acknowledgement screen.

COMPLETING THE 6/1 ACKNOWLEDGEMENT

The 6/1 Acknowledgement must be completed using the guidelines in the MA Stat Plan.

1. Complete the second page of the form.
2. Save the completed form as a pdf or txt file on your PC.

UPLOAD COMPLETED 6/1 ACKNOWLEDGEMENT

The 6/1 Acknowledgement must be submitted in MAFDRA .

1. Follow the instructions for uploading a form on the 6/1 Acknowledgement screen.
2. A 'Submitted Successfully' message will be displayed if the form was uploaded successfully. Click **OK** to proceed.

VIEWING UPLOADED 6/1 ACKNOWLEDGEMENTS

All uploaded 6/1 Acknowledgements can be viewed at any time.

1. Scroll down to the Submitted 6/1 Acknowledgement section.
2. Click the **View** link next to the form to be viewed.

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**Section XI
FREQUENTLY ASKED QUESTIONS**

XI. FREQUENTLY ASKED QUESTIONS

CALENDAR YEAR EXPENSE DATA

- o **What happened to the All State Data and other fields that were once reported on Call # 6 – Calendar Year Expense Call?**

Many of the fields previously existing on Call # 6 - Calendar Year Expense were eliminated per the approved MA Stat Plan for data valued as of 12/31/07. Countrywide expense information is now collected on Call # 6A - Insurance Expense Exhibit.

EXCEL TEMPLATES

- o **Can any templates be used for data submissions?**

No. Templates which comply with the current MA Stat Plan must be downloaded from MAFDRA.

LOGGING IN/OUT

- o **When I go to your website it says I need to change my password as it has expired.**
Do you mean MAFDRA? If yes, please refer to Section V – Edit Contact Information. If no, then please refer to the Member's Area page of the website for log in instructions.
- o **When logging in, the screen states that someone else is logged in?**
Companies are allowed to have multiple contacts. Each contact will have simultaneous access to MAFDRA. When you log in another contact from your company may already be in the system.
- o **When logging in, why do I get a message that states I am already logged in?**
If in your previous session of MAFDRA you did not use the Logoff function to log out, you will get this message upon your return to the system. To get rid of this message click OK, and the next time you logout of MAFDRA click the Logoff link.
- o **How long before a MAFDRA session becomes inactive?**
MAFDRA becomes inactive after one hour of non-use. Any changes that were not saved will be lost. A message will display in **red** text on the screen stating; 'Your session has been timed out'.

PRINTING

- o **What is printed when I click the Print link located on the upper right corner of the screen?**
A printer friendly version of the Call data screen, Comment screen, and Failed Edit screen. To print, you must select **Print** from the File menu. The orientation of All Policy & Accident Year calls must be changed to landscape to ensure that all columns are printed.

RECONCILIATION REPORT

- o **Can the Reconciliation Report be populated with data from a call with a Saved status?**
No. The Reconciliation Report will only pull data from the latest applicable call with a Submitted status.

REMINDER NOTICE OF DUE CALLS

- o **I received notification that a call is due. I have already submitted this call, what should I do?**
Check the calls screen and see if the call is in Saved status. Calls in saved status do not prevent reminder and overdue notices. The call must be submitted.

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Section XI

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FREQUENTLY ASKED QUESTIONS

REQUIRED FILINGS

- o **Our company is licensed to write worker compensation but has no data to report. Are we still required to submit a Financial Data Call Package Acknowledgement through MAFDRA?**

Yes. All companies licensed to transact the business of workers' compensation insurance in the state of Massachusetts are required to submit a Financial Data Call Package Acknowledgement.

- o **In the past our company received an approved filing exemption from WCRIBMA. Are we still required to submit a Financial Data Call Package Acknowledgement through MAFDRA?**

Yes. Companies with previously approved Filing Exemptions must complete Part I and Part II of the Financial Data Call Package Acknowledgement even if the exempt status has not changed to ensure that the Data Operations Department has updated company group and contact information.

If your company has begun to write worker's compensation insurance again you must contact our Data Operations department prior to completing the acknowledgement form. You will be required to complete Part I, Part II, and Part III.

- o **Can I submit all calls required in the MA Stat Plan through MAFDRA?**

Yes. All calls required in Part II of the MA Stat Plan must be submitted through MAFDRA.

- o **Are Annual Statement filings required to be submitted via MAFDRA?**

Call # 6A - Insurance Expense Exhibit is required to be uploaded in to MAFDRA, if your company has not already submitted the IEE to the National Association of Insurance Commissioners (NAIC). All other Annual Statement filings are to be submitted electronically to the WCRIBMA via e-mail or regular mail.

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Section XII

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TROUBLESHOOTING/HELPFUL INFORMATION

XII. TROUBLESHOOTING/HELPFUL INFORMATION

If problems navigating through MAFDRA are encountered, the following list of information may be helpful.

CALCULATED CELLS

Calculated cells on all calls are bolded with **red** font. Data in these cells cannot be altered by typing directly in the calculated cells.

DATABASE CLOSING

Data reporters will be able to view their data calls at the end of the review year after the MAFDRA database has been closed for the year (September - December). At that time the application will allow viewing only. It will not allow creating, saving, or submitting of Acknowledgement forms and data calls.

DECIMALS

This web application does not accept decimals for premium and losses. Data for premium and losses must be reported as a whole number.

EXPORT TO EXCEL

This tool allows data reporters to export the call's data from the web application into an Excel workbook. The data reporter may choose to open or save the workbook to their PC. This Excel workbook can be uploaded back into MAFDRA.

INVALID DATA ENTRY

MAFDRA has data integrity constraints built into the database to ensure negative and non-negative values are reported correctly. MAFDRA also only allows whole numbers to be reported (no decimals). These constraints are in place for entering data onscreen as well as for uploading data via Excel templates. If you are receiving the following error message "Failed to upload file: Invalid Data Entered. Refer to the Troubleshooting section of the User Guide" ensure that the following data validations are met:

- o Data for premium and losses must be reported as a whole number on all calls.
- o Call 2, 2A, 2C, 2D, 2E - Policy Year Calls – The following fields will only accept negative values:
 - Construction Credit
 - QLMP Credit
 - Scheduled Rating Plans
- o Call 2, 2A, 2C, 2D, 2E – Policy Year Calls – The following fields will only accept non-negative values:
 - Standard at Bureau Designated Stat. Reporting Level
 - Standard at Company Level
 - Net Premium
- o Call 2, 2A, 2C, 2D, 2E, 3, 3A, 3C - Policy & Accident Year Calls – The following fields will only accept non-negative values:
 - Indemnity Paid
 - Medical Paid
 - Indemnity Case
 - Medical Case

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- Accumulated Closed (Paid)
 - Open Outstanding
 - DCC Paid
 - DCC Case
- o Call 5 - Direct Written Premium –Non-negative and negative values will be allowed for all fields.
 - o Call 5A – Large Deductible Company Level Written Premium – Non-negative and negative values will be allowed for all fields.
 - o Call 5B – Residual Market Direct Written Premium - Only non-negative values are allowed for the latest policy year's contribution to the call year for all fields. However, negative and non-negative values will be allowed for all other years for all fields.
 - o Call 7 - Large Loss & Catastrophe - Only non-negative values are allowed for all fields.

PRE-POPULATED CELLS (POLICY & ACCIDENT YEAR CALLS)

When creating calls, Policy and Accident Year Calls will initially be pre-populated with data from the latest submission for the previous call year. The data can be altered to reflect the current call year's data.

If prior submissions of a call exist within a call year, Policy and Accident Year Calls will be pre-populated with data from the latest submission of the call within that call year. The data can be altered to reflect revised data.

Policy and Accident Calls created using a downloaded template will not be pre-populated with data.

RECONCILIATION REPORT

- o Call # 4 - The Reconciliation Report call is not pre-filling with data that should be pulled from other calls.
 - Check to see if calls (2, 2A, 2C, 2D, 2E, 3, 3A, 3C) whose data is pulled into Call # 4 is in saved status. If they are in saved status they must first be submitted to the WCRIBMA in order for call 4 to pull the required data fields.
- o Certain premium and loss fields that reconcile to the Annual Statement are pre-populated with data from the last submission of applicable Policy and Accident Year Calls. The data in these pre-populated fields are bolded with **red** font and cannot be altered

REVISING ACCIDENT YEAR CALLS IN ANY CALL YEAR

For Calls 3, 3A, and 3C; if the calendar year losses have been revised the Data Operations also expects a revision to the corresponding Policy Year Call as well as to the Call # 4 - Reconciliation Report. This is to ensure that revised losses are validated against the corresponding Policy Year Call and pulled through and displayed on the latest Reconciliation Report.

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REVISING POLICY YEAR CALLS IN ANY CALL YEAR

For Calls 2, 2A, and 2C, 2D, and 2E; if the calendar year premium & losses have been revised the Data Operations also expect a revision to the corresponding Accident Year Call (if any) as well as to the Call # 4 - Reconciliation Report. This is to ensure that revised losses are validated against the corresponding Accident Year Call (if any) and pulled through on the latest Reconciliation Report.

REVISING PRIOR YEAR'S SUBMISSION

It is important that if data is revised and submitted in a prior call year, the revised data must be carried through up to the current call year by revising the same call up to the current Call Year. For example, a 2003 Policy Year Call appears to have errors in the Indemnity Paid column. The company must begin revising the 2003 data, then the revised data must be validated against the 2004 data, and then the 2005 data must also be revised, up to the current call year.

SHADED FIELDS

Onscreen, the layouts of all policy year calls are generally the same. However, some data elements are not required on certain policy year calls. The fields for these data elements are shaded and no data entry will be accepted.

SUBMITTING A CALL

- o Cannot submit a call. The issue could be PC related. Try submitting the call from another PC.
- o A call cannot be submitted with zero experience.

If there is no experience to report you will need to revise the Call Package Acknowledgement and remove the check mark from the call. Refer to the Part III instructions located in the Completing Call Package Acknowledgement section of this guidebook.

MADFRA will automatically create a nil call (all zeros) once the Call Package Acknowledgement is revised.

TEMPLATE PROBLEMS

Templates must be downloaded from MADFRA. If you experience problems uploading a template into MADFRA check the following:

- o Ensure that you are using a template downloaded from MADFRA.
- o The call year on each template can be changed to facilitate revisions to prior call years. Ensure that you are uploading a template for the call year displayed on the Calls screen.
- o Each call has its own approved template. Ensure that you are trying to upload the approved template for the call that you are working with.

CONTACT DATA OPERATIONS

If none of the suggestions in this section resolve the issue, contact our Data Operations department at Dataoperations@wcribma.org.