MA FINANCIAL DATA REPORTING APPLICATION (MAFDRA)

Company User’s Guide
Effective January 2014
MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA)
COMPANY USER’S GUIDE

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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.

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 - Net Direct Premium
- Call #5A - Large Deductible Written Calendar Year Experience
- Call # 5B – Residual Market Direct Written Premium

April 15th
The following calls are due.
- Call # 6a - Insurance Expense Exhibit
- Call # 7 - Large Loss & Catastrophe Call
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Section I

MAFDRA REPORTING TIMELINE

May 15th
● Call # 6 - Calendar Year Expense Call is due.

June 1st
● The Financial Aggregate Acknowledgement Form (6/1 Acknowledgement) is due.

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

This User’s Guide is provided to assist companies with reporting their financial data through the Massachusetts Financial Data Reporting Application (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 team 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. Please refer to the MA Stat Plan for reporting requirements.

<table>
<thead>
<tr>
<th>Call # and Call Name</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>Financial Data Call Package Acknowledgement form</td>
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<td>3C - Accident Year Large Deductible Call</td>
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<td>April 1st</td>
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<td>5A - Large Deductible Company Level Written Premium</td>
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<td>5B – Direct Written Premium</td>
<td>April 1st</td>
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<td>6A - Insurance Expense Exhibit</td>
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<td>7 - Large Loss &amp; Catastrophe Call</td>
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<td>Aggregate Financial Call Acknowledgement Form (6/1 Acknowledgement)</td>
<td>June 1st</td>
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SYSTEM REQUIREMENTS

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

Data Reporters Requirements:
- Internet access.
- A valid e-mail address.
- MAFDRA web address added as a trusted web site, to allow pop-ups. To Add MAFDRA to the Trusted Site list in Internet Explorer:

1. Go to Internet options.
2. Under the Security tab, select Trusted Sites.
3. Click the Sites button.
4. Enter the MAFDRA Web address (www.mafdra.org).
5. Select the Add button.

Browser Requirements:
We recommend using Internet Explorer 8 or Internet Explorer 9. Internet Explorer 7 is no longer supported.

Platform requirements:
- Windows XP or higher. The application contains optional functions for importing and exporting data that are compatible with Excel 97 – 2003 version worksheets which the WCRIBMA provides. If the data reporter does not have the ability to access Excel 97 – 2003 version worksheets, then they must complete the forms directly on-screen within MAFDRA.

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.

DATA OPERATIONS DEPARTMENT

All questions, comments, concerns regarding this users’ guide should be directed to our Data Operations department at (617) 439-9030 or via e-mail at DataOperations@wcribma.org
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.

USER ID(S) AND PASSWORD(S)

A Data Operations’ team member will create the initial login information for companies newly added to MAFDRA. They will also create a new login for a new primary contact for companies already in MAFDRA, whose listed primary contact is no longer with the company. Primary contacts will receive the initial login information via e-mail.

After receiving the login information provided, the Primary Contact for each company will be responsible for changing their own login information, as well as adding additional contacts via the Call Package Acknowledgement. Please refer to Section V - Edit Contact Information of this user’s guide for detailed information on maintaining contacts.

User ID(s) and Password(s) Requirements

- Username must be at least 6 characters.
- 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 6 characters or greater.
- Usernames and Passwords cannot be the same.
- 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.

Although companies are responsible for the upkeep of their contact information, Data Operations’ team members will provide assistance when needed.
LOGGING INTO MAFDRA
If there is a problem logging into MAFDRA please contact our Data Operations department.

- 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.
- 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.

- To have the account reactivated prior to one hour; please contact our Data Operations department.
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 created, the Home screen converts to a Submissions in Criticism Status screen.

**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.

**FINANCIAL 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, MAFRA 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.
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 previously approved for a filing exemption 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.
Section V

Effective January 1, 2013  FINANCIAL DATA CALL PACKAGE ACKNOWLEDGEMENT FORM

1. Click on the Click Here to Add an Acknowledgement link.

2. Update Part I – Financial Reporting Group (if necessary)

   - This section allows data reporters to report changes in their financial reporting group.
   - Changes to financial grouping must be reported.
   - 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)

   - This section allows data reporters to Add, Edit, Remove, or Delete contact information.
   - 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.
   - 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.

**Edit Contact Information**

Data Reporters have the ability to edit contact information.

- 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.

- 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.

- 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. 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 removing the original contact.

- You will not be able to remove 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 **Remove** link.

**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.

- 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.
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.

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.

4. Update Section III - Call Package

This section allows data reporters to indicate the calls for which their company has experience.

This section also allows data reporters to assign a contact for a particular call.

For companies that are reporting data to WCRIBMA for the first time, the boxes will display an active checkmark.

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.

Disabled checkmarks cannot to be unchecked.
Checkmarks that are not disabled can be unchecked if there is no experience to report for a specific call.

The system initially assigns all calls to the Primary contact.

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.)
Section V
FINANCIAL DATA CALL PACKAGE ACKNOWLEDGEMENT FORM

6. Submit the Call Package Acknowledgement.
   
   - The Call Package Acknowledgement must be submitted in order to begin to creating calls.
   
   - The Call Package Acknowledgement is ready to be submitted after completing Parts I, II and III.
   
   - After submitting a Call Package Acknowledgement the Save link will no longer be available.
   
   - After a Call Package Acknowledgment is submitted the Home screen will no longer prompt you to add a new form.
   
   - 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.

   - To access your submitted form you must go through the Call Package Acknowledgment link.

   - 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.
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.

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

- 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.
NIL calls indicate that there is no experience to report for a particular call.

MAFDRA creates a call with all zeros (0) for calls with a NIL status.

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

Most 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.

- New link - Allows data reporters to enter data onscreen using form within MAFDRA.
- Import link - Allows data reporters to enter data on a excel spreadsheet and then subsequently upload the completed spreadsheet into MAFDRA. Note: MAFDRA currently only supports Excel Worksheets 97-2003.

<table>
<thead>
<tr>
<th>Call # and Call Name</th>
<th>New Link</th>
<th>Import Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 - Policy Year Call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2C - Policy Year Large Deductible Call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2D - Policy Year &quot;F&quot; Classification Call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2E - Policy Year Maritime Classification Call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>3 - Accident Year Call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>3C - Accident Year Large Deductible Call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>4 - Reconciliation Report</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5 - Residual Market Direct Written Premium</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5A - Large Deductible Co Level Written Premium</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5B – Direct Written Premium</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
NEW LINK – ON SCREEN DATA ENTRY
The New link is only available for calls that allow on-screen data entry.

- Data entry is done right within MAFDRA.
- If a call was submitted in the prior call year, the on-screen form will be initially pre-populated with data from the prior year’s submitted call. (Exception: Call # - 4 Reconciliation Report does not pre-populate with prior year’s data)
- If a call has already been created for a specific call year, when clicking the New link the on-screen form will be pre-populated with data from the previous submitted call within the same call year. (Exception: Call # - 4 Reconciliation Report does not pre-populate with data previously submitted within the same call year.)
- Calculated cells are formatted in bolded red text and cannot be overwritten.

1. Click the call you want to work with from the Calls screen to enter the Submission Status screen.

2. Click the New link on the Submission Status screen to view an on-screen template for data entry.

3. Key data in the appropriate cells or copy data from another source and paste it into the correct cells.

4. 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.


3. Click OK.
Revising Saved On-screen Data Calls
For calls with on-screen data entry, the saved call can be revised prior to being submitted.

1. To make changes to a call after it has been saved, click the Revise Call Data button.
2. Make changes to the data directly onscreen.
3. Click the Save button.

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.
4. Click OK.

Comments
Comments are to be used for general messages only.

1. Comments should not be used for edit explanations. Edits must be explained within the Failed Edit screen on an edit level.
2. Click the Comments button.
3. Type a message.
4. 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 Run Edits/Submit 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.
IMPOR T LINK

The Import link is only available for calls with downloadable Excel templates.

- 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.
- Call Type will be defaulted to the call selected on the Submission Status screen.
- The Call Type can be changed by clicking the drop down box and selecting the call type needed.
- Downloaded Excel templates will always default to the current call year. The year on the template can be changed to a prior year by typing the four digit year in Cell B2 of each template.
- Templates may contain protected cells that cannot be overwritten.
- Calculated cells are formatted in bolded Red font and cannot be overwritten.
- Data entry is only allowed in the blue cells.

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.

<table>
<thead>
<tr>
<th>Import Call</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Call Type</td>
</tr>
<tr>
<td>2. Policy Year Call</td>
</tr>
<tr>
<td>Calc using approved template formats can be uploaded to this on-line application.</td>
</tr>
<tr>
<td>To download a version of this call’s approved template to your pc:</td>
</tr>
<tr>
<td>1. Click the below</td>
</tr>
<tr>
<td>2. Policy Year Call Template</td>
</tr>
<tr>
<td>Open template and then save it to a location on your pc.</td>
</tr>
<tr>
<td>Close template when you are done entering data.</td>
</tr>
<tr>
<td>To upload completed approved template directly to this on-line application:</td>
</tr>
<tr>
<td>1. Click Browse.</td>
</tr>
<tr>
<td>2. Select the file to be imported.</td>
</tr>
<tr>
<td>3. Click Open.</td>
</tr>
<tr>
<td>4. Click Upload. The call will be uploaded and stored as a saved file.</td>
</tr>
</tbody>
</table>

Upload Browse
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. 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. To upload a completed template, follow the instructions on the Import Call screen.

2. A ‘Saved Successfully’ confirmation message will be displayed if the call was uploaded successfully, click OK to proceed.

3. 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.

Note: To cancel the call from being uploaded, click the Cancel button to return to the Import Call screen.
Revising Uploaded Calls
Most uploaded calls can be revised on-screen prior to being submitted. (Exception: Call # 7 - Large Loss & Catastrophe cannot be revised on-screen. These two calls require data reporters to make changes to the saved Excel spreadsheet and then re-import the completed spreadsheet.)

1. To make changes to a call after it has been uploaded/saved, click the Revise Call Data button.
2. Make changes to the data on-screen.
3. Click the Save button.

Adding Comments To Uploaded Calls
Comments are to be used for general messages only.

1. To add comments to a call after an upload click the Revised Call Data button.
2. Click the Comments button.
3. Type a message.
4. Click the Save button.

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.
4. Click OK.
Submitting Uploaded Calls
When done entering data and comments for the call, you may begin the Submission process by clicking the Run Edit/Submit button. 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 Run Edits/Submit 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.
VII. RUN EDITS/SUBMIT BUTTON

The Run Edits/Submit button appears on the data entry screen after clicking the New link. It also appears on the screen after a call has been saved. This function allows 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.

RUN EDIT/SUBMIT
The Run Edits/Submit button is available on the Data Entry and Saved Calls screens.

Data Entry Screen

Saved Call Screen
Using the Run Edits/Submit function will only allow comparison edits to be run on calls with a Submitted status.

Selecting the Run Edits/Submit button gives the data reporter the ability to add edit notes as well as submit the call.

**Viewing Failed Edits**
Failed edits can be viewed after the Failed Edits link becomes visible.

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

2. Note that a Submit button appears at the top and bottom of the screen. Also note that the Add Note button appears next to each edit.

3. Review edits displayed on the Submit Call - Failed Edits Listing.

**Fixing Incorrect Data**
If the failed edits listing reveals incorrectly reported data, you can revise the data. **Note: A call that has been submitted cannot be edited.** (See Section VIII – Revising Submitted Calls). After revising the data, Basic & Actuarial edits must be rerun against revised data prior to submitting the call.

1. Most calls can be revised onscreen. Click the Calls Data link at the top of the screen to get back to the call’s data.

2. Click the Revise Call Data button.

3. Change the incorrect data.
4. Call # 7 Large Loss & Catastrophe cannot be revised onscreen. This call requires data reporters to make changes to the saved Excel spreadsheet and then re-import the completed spreadsheet.

5. After data has been revised. Click the Run Edit/Submit button to rerun Basic & Actuarial edits.

Adding 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.)

- All Basic & Actuarial edit failures must be accompanied by an edit note.
- Edit note text cannot be greater than 255 characters. More than 255 characters should be sent via email.

1. To add an edit note, 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.

- Although a note can be deleted, every edit failure must have an explanation prior to being submitted to the WCRIBMA.

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.
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 function.

- Data Operations strongly encourages data reporters to 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.

- Data Operations’ staff will review all Submitted calls.

- 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

   Submission Status Screen

REVISING SUBMITTED CALLS
Incorrectly reported data can be revised anytime by resubmitting a call.
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)

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. (Exception: Call # - 4 Reconciliation Report does not pre-populate with data previously submitted within the same call year.)

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.

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, type the four digit year in cell B2 of the template and then upload the completed form.
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. Also displayed is the Requested Resolved Date.

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.

- Criticisms are e-mailed to the contact designated for that call and the Primary contact for the group.
- The Calls screen and the Submission Status screen will show a status of Criticism, formatted in bolded red font, to alert the data reporter.
ACCESSING A CRITICISM
Criticisms can be viewed at any time.

- 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.

- 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.

- 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.

<table>
<thead>
<tr>
<th>Calls</th>
<th>Text Edits</th>
<th>Failed Edits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Criticism</td>
<td></td>
</tr>
<tr>
<td>From</td>
<td><a href="mailto:sohopark@workma.org">sohopark@workma.org</a></td>
<td></td>
</tr>
<tr>
<td>To</td>
<td><a href="mailto:test@teestrnc.com">test@teestrnc.com</a></td>
<td></td>
</tr>
<tr>
<td>CC</td>
<td><a href="mailto:dir@testcompany.com">dir@testcompany.com</a></td>
<td></td>
</tr>
<tr>
<td>Response Due</td>
<td>12/19/2006</td>
<td></td>
</tr>
</tbody>
</table>

**Body:**
The Financial Data Services department has performed an edit review on [Veteran's Insurance Corp]'s 2005 POLICY YEAR CALL. Please log into MAFDRA (https://www.mafdra.org/agencygroup) and review all edit failures that do not have a "Resolved" note, and provide an acceptable response for all edit failures by Friday, December 15, 2006.

An acceptable response for Actuarial and Basic edits must be a correction to incorrect data or an acceptable explanation for data not correct. See the Statistical Plan Part II, Section IV - Data Quality Incentive Program for more details on what is deemed an acceptable explanation.

Each Actuarial edit failure not resolved by the date requested above will be assessed a fine of $250 per day until it is resolved.

Also, please note that your submission has failed all Basic edits. Each failed Basic edit will be assessed a fine of $250 per occurrence.

Should you have any questions, please feel free to contact me.

Shaneitha Shepard
Financial Data Services
VORR Massachusetts
617-439-1030

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.
- **CC** - Primary contact will be cc’d on all criticisms sent.
- **Sent** - Date e-mail was sent.
- **Response Due** - Date an adequate response needed from company to avoid fines.
- **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.

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.
Section IX
CRITICISMS

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.
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.

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.

1. Click the 6/1 Acknowledgement 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.
MASSACHUSETTS FINANCIAL DATA REPORTING APPLICATION (MAFDRA)  
COMPANY USER’S GUIDE

Section X

Effective January 1, 2013  AGGREGATE FINANCIAL CALL ACKNOWLEDGEMENT FORM

Upload Completed 6/1 Acknowledgement
Uploaded calls are automatically submitted.

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.
XI. NOTES TO CONSIDER

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 cannot be uploaded back into MAFDRA.

Pre-populated Cells (Policy & Accident Year Calls)
When creating calls onscreen, 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
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.

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.
NOTES TO CONSIDER

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.
XII. FREQUENTLY ASKED QUESTIONS

Calendar Year Expense Data
- 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
- 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
- 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.
- 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.
- 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.
- 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
- 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
- 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

- 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.

Required Filings

- 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.

- 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.

- 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.

- 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.
XIII. TROUBLESHOOTING

If problems navigating through MAFDRA are encountered, please contact the Data Operations at (617) 439-9030. The following is a list of solutions to known problems that a data reporter may experience.

**Data Validations**

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 experience problems entering data onscreen or uploading a template into MAFDRA, ensure that the following data validations are met:

- Data for premium and losses must be reported as a whole number on all calls.

- **Call 2, 2A, 2C, 2D, 2E - Policy Year Calls** – The following fields will only accept negative values:
  - Construction Credit
  - QLMP Credit
  - Scheduled Rating Plans

- **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

- **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
  - Accumulated Closed (Paid)
  - Open Outstanding
  - DCC Paid
  - DCC Case

- **Call 5 - Direct Written Premium** – Non-negative and negative values will be allowed for all fields.

- **Call 5A – Large Deductible Company Level Written Premium** – Non-negative and negative values will be allowed for all fields.

- **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.

- **Call 7 - Large Loss & Catastrophe** - Only non-negative values are allowed for all fields.
Reconciliation Report
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.

Submitting A Call
Cannot Submit a call.

- The issue could be PC related. Try submitting the call from another PC.

- 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 MAFDRA. If you experience problems uploading a template into MAFDRA check the following:

- Ensure that you are using a template downloaded from MAFDRA (MAFDRA currently only supports Excel Worksheets 97-2003).

- 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.

- 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.