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MANAGE USR

USER GUIDE

THE WORKERS' COMPENSATION RATING AND INSPECTION BUREAU OF MASSACHUSETTS

Manage USR User Guide

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Manage USR Overview

Manage USR is a web based application that provides Bureau members with the ability to view and correct USR data. The user is able to view the USR data and edits as they appear in the Bureau's database. The user is also able to view the "due" status of USR information and data.

Users will have the option to:
- Create, correct, or replace USRs within the application and to transmit them directly to the Bureau
- Verify certain USR edits directly within the application
- Search and track unit statistical information from a "predelinquent" to an "accepted" status

The application will be updated on a daily basis. USRs processed on a Monday will appear in Manage USR on Tuesday. Manage USR will not be updated on weekends. Therefore, data processed on Friday will not appear in Manage USR until the following Monday.

Manage USR contains only unit statistical data required for the Bureau's annual summary. For example, in 2010, unit statistical data that has been received by the Bureau will be available for policies effective 1/1/99 and later. For unit statistical tracking purposes, Manage USR contains policy information from initial receipt of the policy through acceptance of any expected unit reports. For example, in 2010, unit statistical tracking information will include any policy effective 1/1/99 forward, where a unit report is due or will be due at some point in the future.

For access to the product, please refer to the Secure Online Services Account User Guide in the Secure Online Services Account (SOSA) area of the Bureau's website,

https://www.wcribma.org/mass/Products/Membership/login.aspx..

Once logged into the Secure Online Services Account (SOSA) area, select the Manage USR product from the list of available products.

Multiple users for a particular carrier group may be working within the application at the same time, so users need to be careful about managing their workloads. If two people are working on the same USR at the same time, it could cause data discrepancies or result in errors within the application.

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Searching in Manage USR

Manage USR has five different search functionalities represented by four tabs: General Search, Search by Claim, Search by Submission, Current View Search and UST Search.

Wildcards may be used in Manage USR on a policy number and/or claim number. Use a percent symbol (%) as a wildcard at the beginning of the partial policy number or claim number. Use blanks or % as wildcards at the end of the partial policy number or claim number.

A minimum of 3 characters (not including the wildcard) has to be entered to conduct a search on policy or claim number. The search results will include all policy numbers or claim numbers that include the specific data entered. More specifically, %abc or %abc% will get all units with "abc" somewhere in the policy number or claim number. And abc functions the same way as abc% (that is, policy number or claim number that begins with "abc").

General Search

Once logged into Manage USR, you will be brought to the General Search screen. You can also access the General Search from elsewhere in the application by selecting the "General Search" tab.

The carrier drop down list will contain only those carriers belonging to your group as per the Secure Online Services Account (SOSA) area set up. You have the option to search by a single carrier, multiple carriers or on a group level. To search by group, select the check box next to the group name at the top. To search by individual carriers, select the check boxes for those carriers you wish to include in your search by clicking them off individually.

The search criteria are:
- Policy Number
  To search by policy number, you must enter at least 3 characters not including the wildcard (%).
- Policy Effective Date
- Report Number
- Correction Sequence Number
- Combo ID
- Coverage ID
- Web Status

- Web Status is the status for those USRs created within the Manage USR application, whether by a new submission, a correction or a replacement.
    - All (includes Submitted and Unsubmitted)
    - Submitted (units that have been created within the Manage USR product and have been transmitted to the Bureau via the WCSTAT file)
    - Unsubmitted (units that have been created within the Manage USR product, but have not yet been transmitted to the Bureau)

Any combination of search criteria may be entered. However, search criteria are not needed to conduct a search. The more options used the more specific the search results will be. Click search or press enter to search once you have selected your criteria. Hit reset to clear all search criteria and results.

One or more rows will be brought back based on your search criteria. If no data, you will receive a message. The total number of records returned will appear at the top of your search results. The maximum number of search results that will be returned is 1000 records (rows). You can sort the search results by clicking on any one of the column headers.

You can select one or more USRs to perform one of the following options:
- View USR Detail
- Add to WCSTAT File
- Add to My List

Users have the option to select an individual USR, multiple USRs or all of the USRs on the page. To select all of the USRs on the page, check off the box located in the header row.

You can view the Errors for an individual USR, by clicking on the View Errors link at the end of the USR's row.

Search by Claim

You can access the Search by Claim option by selecting the "Search by Claim" tab.

The carrier drop down list will contain only those carriers belonging to your group as per the Secure Online Services Account (SOSA) area set up. You have the option to search by a single carrier, multiple carriers or on a group level. To search by group, select the check box next to the group name at the top. To search by individual carriers, select the check boxes for those carriers you wish to include in your search by clicking them off individually.

The search criteria are:
- Claim Number
  Claim number is required.
  To search by partial claim number, you must enter at least 3 characters not including the wildcard (%).
- Policy Number
  To search by partial policy number, you must enter at least 3 characters not including the wildcard (%).
- Policy Effective Year

You can further limit your search results by entering the policy number and/or effective year of the claim you wish to view. One or more rows will be brought back based on your search criteria. If no data, you will receive a message. The total number of records returned will appear at the top of your search results. The maximum number of search results that will be returned is 1000 records (rows). You can sort the search results by clicking on any one of the column headers. Hit reset to clear all search criteria and results.

You can select one or more USRs to perform one of the following options:
- View USR Detail
- Add to WCSTAT File
- Add to My List

You have the option to select an individual USR, multiple USRs or all of the USRs on the page. To select all of the USRs on the page, check off the box located in the header row.

Search by Submission

You can access the Search by Submission option by selecting the "Search by Submission" tab.

The carrier drop down list will be disabled as search by submission is on a group level basis only.

The search criteria are:
- Received Date (from)
- Received Date (to)
- Submission ID

You can enter the submission id if you know it or can search by a date range. At least one of the above search criteria is required. One or more rows will be brought back based on your search criteria. If no data, you will receive a message. The total number of records returned will appear at the top of your search results. The maximum number of search results that will be returned is 1000 records (rows). You can sort the search results by clicking on any one of the column headers. Hit reset to clear all search criteria and results.

The user can select one or more USRs to perform one of the following options:
- View Submission Detail
- Add to WCSTAT File
- Add to My List

Users have the option to select an individual submission, multiple submissions or all of the submissions on the page. To select all of the submissions on the page, check off the box located in the header row.

To view the Submission Details, select the "View Submission Details" button. A list of USRs contained within that submission will be returned. To view a USR, check off the box next to that particular unit and click the View USR Detail button. You have the option to check off an individual USR or multiple USRs.

To view all of the errors in a submission, click the View Errors link at the end of the Submission's row.

Current View Search

You can access the Current View Search by selecting the "Current View Search" tab.

Current View offers a picture of what the USRs for a particular policy looks like as it stands today. It compiles all of the Accepted USRs. It ignores any USRs that are in a Failed or Rejected status.

The carrier drop down list will contain only those carriers belonging to your group as per the Secure Online Services Account (SOSA) area set up. You have the option to search by a single carrier, multiple carriers or on a group level. To search by group, select the check box next to the group name at the top. To search by individual carriers, select the check boxes for those carriers you wish to include in your search by checking them off individually.

The search criteria are:

- Policy Number
  Policy number is required.
  To search by partial policy number, you must enter at least 3 characters not including the wildcard (%).
- Policy Effective Date
- Report Number
- Combo ID
- Coverage ID

One or more rows will be brought back based on your search criteria. If no data, you will receive a message. The total number of records returned will appear at the top of your search results. The maximum number of search results that will be returned is 1000 records (rows). You can sort the search results by clicking on any one of the column headers. Hit reset to clear all search criteria and results.

The user can select to view the current view detail of one or more Current View USRs to perform by clicking View USR Detail.

Users have the option to select an individual USR, multiple USRs or all of the USRs on the page. To select all of the USRs on the page, check off the box located in the header row.

Once in a Current View USR, you will see a message located to the right of the loss tab. The message will say "YOU ARE VIEWING a Current View USR."

UST Search

You can access the UST Search by selecting the "UST Search" tab. Alternatively, you can select the "UST" link in the menu bar.

UST Search provides the ability to search tracking status of USRs that have not yet been received and accepted by the Bureau. Units are tracked in accordance with the Data Quality Incentive Program of the MA Statistical Plan.

- Except for the two situations discussed below, the tracking status of individual units listed in UST is created as a placeholder from policy data or from previously accepted unit statistical reports, indicating a USR is expected. If an expected unit is received and rejected, its edit status will also be listed.

- The exceptions are:
  - Rejected corrections are not "expected", based on policy or other unit statistical data. However, if corrections are received it is assumed that they

are necessary for data accuracy. Rejected corrections cannot be applied to the unit and must be resolved. They are tracked and, if not resolved, are subject to fine.
  ▪ Units that are accepted but filtered from Annual Summary are not "expected', based on policy or other unit statistical data. However, they include errors that need to be resolved in order for the data to be included in Annual Summary. Therefore, they are tracked if they become subject to Disciplinary fines.

- If a USR has been received and if that USR is tracked, the search results will show the UST status and the edit status. The unit and its edit status can also be found through General Search, but the UST tracking status is only in UST Search.

- A first report USR is due on the last day of the 20th month. Subsequent units are due each 12 months thereafter (month 32, 44, etc.). The USR is considered delinquent if not received or accepted as of the 1st day of the 21st month, 33rd month, 45th month, etc.

- Rejected correction reports are fined if they remain in rejected status for 3 or more months after they are first rejected.

- Units for which the Bureau does not have a record of the policy are rejected. Such units are fined, if the policy is not received as of the 1st day of the 21st month.

- Units that are missing, rejected or filtered from Annual Summary (ABACUS) may be subject to Disciplinary fines as of June 30th during a given review year. Units that are subject to Disciplinary fines will be included in UST.

- Units that are fined, are fined each month until the error is resolved.
  ▪ Exception: Disciplinary fines end when Annual Summary for a given review year is closed. If a unit that is subject to Disciplinary fines is not resolved, when Annual Summary is closed, it will no longer appear in the Disciplinary Fines category. However, if applicable, it will continue to appear in one or more of the other fine categories. It will also most likely be subject to Disciplinary fines again the following year.

The carrier drop down list will contain only those carriers belonging to your group as per the Secure Online Services Account (SOSA) area set up. You have the option to search by a single carrier, multiple carriers or on a group level. To search by group, select the check box next to the group name at the top. To search by individual carriers, select the check boxes for those carriers you wish to include in your search by clicking them off individually.

After a carrier selection is made, you have the options:
- View/Print Totals Report

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- Search for tracked units

The search criteria are (at least one is required):

- Policy Number
  To search by partial policy number, you must enter at least 3 characters not including the wildcard (%)

- Due Status
  - All Fined – Delinquent and Fined, Fined Rejected Corrections, Unmatched Fined

  - CORR – Rejected Correction – Not Fined
    - Correction reports that have been in rejected status for less than 3 months
    - *Note: The "Due Date" displayed in the search results for CORR is the 20th month from the policy effective date.*

  - CORRF – Rejected Correction – Fined
    - Correction reports that have been in rejected status for 3 or more months
    - *Note: The "Due Date" displayed in the search results for CORRF is the 20th month from the policy effective date.*

  - DISC – Disciplinary Fine
    - Units that are subject to Annual Summary (ABACUS) fines

  - DLQ – Delinquent and Fined
    - Units that were not received or accepted as of the 21st month or for subsequent reports as of the 33rd month, 45th month, etc.

  - Due – Due
    - Units currently due to be submitted This is the period between valuation and due date.

  - PDLQ – Pre-delinquent
    - Units that will be due at the Bureau at some point in the future

  - UNM – Unmatched – Not Fined
    - Units that were submitted to the Bureau before the 21st month, but were rejected due to the fact that they cannot be matched to a policy

  - UNMF – Unmatched – Fined
    - Units that were submitted to the Bureau and are in rejected status on or after the 21st month, due to the fact that they cannot be matched to a policy

- Due As of Date

Search results include all units that are due in the selected month and year. The current month and year are the earliest month and year that may be selected.

The due statuses that are included in the search results are the current due statuses for the month/year selected. Therefore, the search results could include one or more of the following due statues:
- Due
- CORR
- PDLQ
- UNM

One or more rows will be brought back based on your search criteria. If no data, you will receive a message. The total number of records returned will appear at the top of your search results.

All records that meet the search criteria will be returned (other areas in Manage USR have a 1000 record limit). You can sort the search results by clicking on any one of the column headers. Hit reset to clear all search criteria and results.

From the search results, you can:
- Download UST Report - All
- Select one or more USRs to:
  - Download UST Report, for selected items in the search results
  - View USR Detail
  - *Detail information is available only for units that have an edit status.*

Users have the option to select an individual USR, multiple USRs or all of the USRs on the page. To select all of the USRs on the page, check off the box located in the header row.

View USR/Submission Detail

From any of your search results you can choose to View USR Details.

Please note that ICR data will not be available in Manage USR. Only header, exposure, loss and total information will be accessible within this application. USRs that were previously reported with ICR data will be available within the application. However, the ICR information will not be displayed. USRs submitted as an ICR correction type C will be available, but only the header will be displayed.

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<u>View USR Details from the General Search, Search by Claim and UST Search results:</u>

You can select one or more USRs to view the details on by using the check boxes next to the USR. The check box on the header row allows the user to select all the USRs on the page.

Once you have selected your USR(s), hit the "View USR Details" button. You will be brought to the header record of the first USR in your list. If you have selected multiple USRs to view, you can move from USR to USR using the arrows in the top right corner of the screen. Each time you move to a new USR you will be brought to the header screen.

While viewing the USR detail, you have the options listed below. In most cases, if the option is NOT available, the button will appear on the screen but will be grayed out.

- Add to My List
  This option is available for all USRs, except Current View
- Print USR
  This option is available for all USRs. USRs must be printed individually.
- Add to WCSTAT File
  This option is available for all USRs, except Current View
- View Errors
  This option is available for all USRs, but only those with an Edit Status will have error information. Note: This option is a tab, not a button.
- Correct
  This option is available for USRs with an Edit Status only
- Replace
  This option is available for USRs with an Edit Status only
- Modify
  This option is available for USRs with a Web Status of Unsubmitted only
- View Original
  This option is available for those USRs having an original report (see "View Original and View Modified" below for details)
  USR will have note "YOU ARE VIEWING the Modified USR- an Originally Reported USR exists"
- View Modified
  This option is available for those USRs having a modified report (see "View Original and View Modified" below for details)
  USR will have note "YOU ARE VIEWING the Originally Reported USR- a Modified USR exists"
- Back *(this brings you back to the search results screen)*

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View Original and View Modified

In most cases, the Bureau's internal system automatically processes USR correction reports on data that has not yet been accepted. In those cases, the Bureau's system creates and saves the originally reported USR that is being corrected and the originally reported USR correction and creates a copy of each. The corrections are applied to the report that is being corrected (Modified USR). The correction report may also be modified in this process. The Modified USRs are the USRs that are edited and displayed in Manage USR.

View USR Details from the Search by Submission results:

Users can select one or more submissions to view the USRs contained on that submission. To view the submission details, select the "View Submission Details" button. A list of USRs contained within the submission(s) will be returned.

While viewing the submission detail, the user has the following options:
- Add to My List
- Add to WCSTAT File
- View USR Detail
- View USR ErrorsBack *(this brings you back to the submission details screen)*

To view a particular USR(s), use the check boxes to the left of the USRs you wish to view and click the "View USR Details" button. You will be brought to the header record of the first USR in your list. If you have selected multiple USRs to view, you can move from USR to USR by using the arrows in the top right corner of the screen. Each time you move to a new USR you will be brought to the header screen.

You will have the same options discussed above, in View USR Detail from General Search and Search by Claim, except Back will bring you back to the submission detail screen. You need to hit back again in order to go to the submission search results screen.

View USR Details from the Current View Search results:

The USR details for a Current View USR will be a picture of the accepted data as it appears today or up through the report level you have selected.

- The header information will be that header information reported on the first report and the last header corrections (correction type H or M) to the first report.
- The exposure information will be that exposure information reported on the first report and any exposure corrections (correction type E or M) to the first report. The exposure records will each include the report level and correction sequence where the record was last reported, so you can easily track back to the USR if needed.
- The loss information will be the loss information last reported on any report level and correction (correction type L, M or A). The loss records will each include the report level and correction sequence where the record was last reported so that you can easily track back to the USR if needed.

You can select one or more USRs to view the details on by using the check boxes next to the USR. The check box on the header row allows you to select all the USRs on the page.

Once you have selected your USR(s), hit the "View USR Details" button. You will be brought to the header record of the first USR in your list. If you have selected multiple USRs to view, you can move from USR to USR using the arrows in the top right corner of the screen. Each time you move to a new USR you will be brought to the header screen.

While viewing the USR detail, you have the following options:
- Print USR
- View Errors
- Back (this brings you back to the search results screen)

Print USR

A USR can be printed from within the View USR Detail option. USRs must be printed individually.

Error Reports

Error reports are held in the Error Reports application, in the Secure Online Services Account (SOSA) area. Users must have specific security to access to the Error Reports application.

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Provided you have the appropriate security, you may access Error Reports from within Manage USR, as described below, or by going to the Error Reports application from the SOSA products list. The Error Reports application enables you to search for errors across multiple submissions and provides various search options.

<u>View Individual USR Errors</u>

You can view the error report for an individual USR either by clicking the "View" link in the Errors column of the General Search results or, from within the USR itself, by clicking the View Errors tab to the right of the Loss tab. You can also view the error report for an individual USR within a submission, as described in View Submission Errors. Refer to Error Reports Search, below, and the Error Reports User Guide for more information.

<u>View Submission Errors</u>

You can view all of the the errors in a submission by clicking the"View" link at the end of the submission's row, in the Search by Submission results .

You can also view the errors for an individual USR within a submission. From the Search by Submission search results, select the submission and click View Submission Detail. Then either click the "View" link in the Errors column at the end of the USR's row; or select to View USR Detail then click the Errors tab to the right of the Loss tab. Refer to Error Reports Search, below, and the Error Reports User Guide for more information.

<u>Error Reports Search</u>

The Error Reports application enables you to search for errors, using various search criteria. Users must have specific security to access to the Error Reports application.

Provided you have security for Error Reports, you can access Error Reports from the Search Errors menu item in Manage USR or from the product list in the Secure Online Services Account (SOSA) area.

When you execute the search, all records matching your criteria will be returned in the search results grid, up to a maximum of 1000 records. If the number of records exceeds 1000 (but don't exceed 20000), a message will display on the screen that the results are only available in an excel file to download. If the number of records exceeds 20000, a message will display on the screen requesting that you refine your search criteria.

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The available search fields are below. Refer to the Error Reports User Guide for more specific information.

• Data Source –The search returns errors for the data source that is selected. To view only USR errors, select WCSTAT.

• Submission ID — The search returns only records where the Submission ID matches the value you enter.

• Received Date—The search returns only records where the Received Date is in the specified date range.

• Policy Number— The search returns only records where the Policy Number matches the exact value you enter.

• Submission ID— The search returns only records where the Submission ID matches the value you enter.

• Report Number – The search returns only records where the Report Number matches the value you enter.

• Correction Seq Number – The search returns only records where the Correction Sequence Number matches the value you enter.

• Is Finable – The search returns records that match the value that you selected. Leave the field blank for both finable and non-finable errors.

• Edit ID— The search returns only records where the Edit ID matches the value you enter.

• Error Status - The search returns only records where the Error Status matches the value you select.

• Severity - The search returns only records where the Severity matches the value you select.

<u>Search Results</u>

General information regarding Error Reports search results is below. Refer to the Error Reports User Guide for more information.

Because the Error Reports application is used for policy transaction errors and unit statistical errors:

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Some of the columns in the Error Reports search results apply only to policy data and some apply only to unit statistical data.

Most, but not all, of the error information can be displayed on the screen. Complete error information displays in the Excel Download. As with the search result screen some columns apply only to policy data and some apply only to statistical data.

If the error resolution status can be determined, electronically, the resolution status of the error will be displayed, in the Error Status column.

Some errors include an "Explain" link in the Explanation column. The link takes you to the Explanation Capture System. Refer to the Explanation Capture System User Guide for additional information.

Note: The Error Reports application gives you the option to download the information in PDF format, by clicking the Download PDF link or download it in the form of an Excel spreadsheet, by clicking the Download Excel link. The PDF download displays the same columns that display on the search results screen. The Excel download displays complete error data. Your browser configuration will determine whether you must save the PDF or Excel file, before opening it or if the file will open in your browser. If you save the file, you may then open and print it. If it opens automatically or if you choose to open it, you may print it or save it. If the error resolution status can be determined, electronically, the resolution status of the error will be displayed, in the Error Status column.

Please also note that if the error report is large (hundreds of pages), you could experience difficulty in opening and viewing it. You may need to narrow your search further and/or view the errors for a specific set of the data.

Error Reports MyList

The checkbox in each row allows you to select records for inclusion in "MyList," a personalized view of specific USR error records that you have identified. After the desired rows are selected, click the "Add selected to MyList" link. If you want to select all error records that are in the current search results, click the "Add all results to MyList." To access the records you have added, click the "MyList" icon that is above the Submission ID field.

View/Print/Download UST Reports

Totals Report

The Totals Report provides the total number of tracked USRs, for each tracking status. The Totals Report is in .PDF format.

You can view and print the Totals Report for a single carrier, multiple carriers or all carriers within the group.

To view the report, select one or more carriers and click the View/Print Totals Report button.

Download UST Report

The UST Report provides a list of the tracked units that are in a given set of search results. The UST Report is in Excel format.

You can view and download the UST Report for a single carrier, multiple carriers or all carriers within the group. You can include one or more USRs from the search results.

To view and download the UST Report, select one or more USRs in the search results. Once you have selected the USRs you would like to include in the report, click the "Download UST Report" button.

Download UST Report – All

The UST Report – All provides a list of all of the tracked units that are in a given set of search results. The UST Report - All is in Excel format. It has the same filename as the UST Report.

You can view and download the UST Report - All for a single carrier, multiple carriers or all carriers within the group.

To view and download the UST Report – All, click the "Download UST Report – All" button. You do not need to select any USRs for this option. If you do select any USRs, this report will override the selection and provide a list of all of the USRs that are in the search results

Create a New USR

To create a new USR, click on New Submission which is located in the top right corner of the screen. A new unit will be brought up with the ability to fill in the header

information, as well as the exposure, loss and totals records. To save a USR at any time, click the "Save" button at the top of the screen. Hitting "Save" will result in an unsubmitted USR being created. If you have not finished entering the information and you wish to go back after you have saved, you must use the Modify feature to continue entering your data. You do not have to hit "Save" before moving from one tab to the next within the USR. The system will retain the information while you are in the USR. However, you must hit "Save" before you leave the USR or your data will be lost.

Header

There are a number of required fields that need to be filled in on the header record. These are:

- Carrier ID
- Policy Number
- Policy Effective Date
- Policy Expiration Date
- Report Number
- Correction Sequence Number
- Correction Type (only if it is a correction)
- Insured Name
- Estimated Audit

If you do not fill in one or more of these and you try to proceed to the Exposure or Loss tabs, an error will appear with the list of the required fields. These will also be highlighted in red.

Upon opening a New Submission, the Exposure State, Policy Conditions (except Estimated Audit) and Policy Type ID fields on the header are filled in with default selections. All of tthe Policy Condition fields, except Estimated Audit, are check boxes. The check boxes are defaulted to unchecked which is the same as N, or no. To change to Y, or yes, simply check the box. Estimated Audit has a dropdown selection. The options are Y (Yes),N (No) and U (Uncooperative). Except for Exposure State, you may change the defaults if they do not apply to the USR being created. Exposure State may not be changed. If the USR is not for exposure state 20, it is not a Massachusetts USR.

Please refer to our Statistical Plan for detailed header reporting requirements.

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Exposures

Before you begin entering your exposure records, you must first enter in a split indicator. To enter a split, type in the split number in the first field box and hit the "Add Split" button. This will open the exposure record fields by type: subject to mod; not subject to mod; and non standard.

To enter the rate or mod effective date, you can key it in or use the drop down arrow to open the calendar and select your dates. All mod effective dates on the R records must be the same within a split and all rate effective dates on the R records must be the same within a split.

To add another split, enter the split number and click the "Add Split" button.

If you need to change exposure data after you have clicked the "Add Exposure" button, click the Edit option at the end of the exposure row. The row will become available for updates and the Edit option will change to Save. Make your changes and then click the Save option at the end of the row. If you need to delete and exposure row after you have added it, click the Delete option at the end of the exposure row.

Once you have entered all of the exposure information, click the "Add Exposure" button. You will need to calculate the Exposure Totals once you have finished entering all of your exposure records. To calculate the exposure totals, scroll down to the totals and hit "Calculate". Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

In order for Manage USR to save exposures, the fields below are required:
- Update Type
- Mod Effective Date
- Rate Effective Date
- Exposure Act
- Class
- Premium
- Exposure Totals

Please refer to our Statistical Plan for detailed exposure reporting requirements.

Losses

To add a loss, fill in all the loss information and then click the "Add Loss" button.

You will need to calculate the Loss Totals once you have finished entering all of your loss records. To calculate the loss totals, scroll down to the totals and hit "Calculate". Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

Some fields have a dropdown arrow. For accident date, you may enter the accident date or click the dropdown arrow to select the date from the calendar. For other fields with a dropdown arrow, you may click the dropdown and select the data or you may keep entering the first character of the code or use the up and down arrows until the desired code appears in the field.

In order for Manage USR to save losses, the fields below are required:

- Update Type
- Claim Number
- Accident Date
- Class Code
- Injury Part
- Injury Nature
- Injury Cause

If a loss is not needed or the information has been entered incorrectly, before you click the "Add Loss" button, you can use the "Clear" button to clear the data. Note: If you click the add loss button and then you determine that the loss should not have been entered, select the loss from the loss grid and then click the "Delete Loss" button. If you click the "Add Loss" button and then determine that a change is needed, select the loss from the loss grid, make your changes and then click the "Update Loss" button.

Note: Group claims may not be entered in Manage USR.

Please refer to our Statistical Plan for detailed loss reporting requirements.

<u>Save/Cancel</u>

When you have completed your USR, you may save the USR by hitting "Save" located at the top of the screen. If you choose not to save your changes, you can hit "Cancel" also located at the top of the screen. A pop up asking you to confirm your wish to cancel will appear. If you click "OK" you will cancel the modification and you will be returned to the last search screen you were using and you will have lost your changes. If after you have saved, you want to make another change, you can use the "Modify" feature.

Correct USR

While you are in View USR mode, you have the option to create a correction report using the USR you are viewing as the basis. USRs with any edit status can be corrected. However, USRs with an unsubmitted or submitted web status cannot be corrected.

To correct a USR:
- Hit the "Correct" button at the top of the screen
- Select the correction type you wish to enter, this will take you to the Correct USR header screen.
    - The other tabs that are available are based on the correction type selected.
    - You will notice that the correction sequence number has been increased by 1 and the correction type was added to the header.
    - The correction sequence may be changed, but the correction type may not be changed.
    - To change the correction type, you must cancel the correction and start again using the "Correct" button.
- Navigate to the other tabs to make corrections where needed.

You may not create a replacement report using the Correct option. The replacement indicator field is frozen during the Correct process. To create a replacement report, use the Replace option (see section on Replace USR).

Please note that using "Correct" will result in P & R records being created for all exposure and loss information which was contained on the USR that you used to create the correction. The P and R records are created for all records contained within the USR that was used to create the correction. Only the data that was on the USR that was used to make the correction will be included on the correction report. You can use

the "Add Exposure" and "Add Loss" functions to add data. You also have the option to delete those records you do not wish to change or to leave them as is. Leaving them as is will not result in any change to the data.

Header link changes

When you change the carrier code, policy number or policy effective date, the system will automatically save the original carrier code, policy number and policy effective date in the Previous Fields that are located in the bottom left of the Header. You can view these Previous Fields, but cannot edit them.

Exposures

Exposures can be modified by:
- Adding a new exposure record- Enter the data on a new record and click the "Add Expo" button to the right of the row.
- Updating an existing exposure record- Click the "Edit" option to the right of the exposure row. Make the appropriate changes and click the Save option to the right of the exposure row. If you make changes and decide not to save them, click the Cancel option to the right of the exposure row.
- Deleting an existing exposure record- Click the "Delete" option to the right of the exposure row. You will receive a confirmation pop-up. To delete the exposure record, hit OK. If you do not want to delete the exposure record, hit Cancel.
- Adding another split- In the empty split fields below the last entered exposure section, enter the new split number and click the "Add Split" button. From there you can enter the appropriate data.

When you have finished, you can then calculate your exposure totals by hitting the "Calculate Totals" button on the bottom of the exposure screen. Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

Losses

Losses can be modified by:
- Adding a new loss record- Input the loss information and hit "Add Loss".
- Updating an existing loss record- Select the loss you would like to change and change the information in the fields below the list. Once you have made your changes, hit "Update Loss".

- Deleting an existing loss record- Select the loss you would like to delete and click the "Delete" option to the right of the loss row. You will receive a confirmation pop-up. To delete the loss, hit OK. If you do not want to delete the record, hit Cancel.

When you have finished, you can then calculate your loss totals by hitting the "Calculate Totals" button at the bottom of the screen. Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

Note: Group claims cannot be added or corrected in Manage USR.

Save/Cancel

When you have completed your USR, you may save the USR by hitting "Save" located at the top of the screen. If you choose not to save your changes, you can hit "Cancel" also located at the top of the screen. A pop up asking you to confirm your wish to cancel will appear. If you click "OK" you will cancel the modification and you will be returned to the last search screen you were using and you will have lost your changes. If after you have saved, you want to make another change, you can use the "Modify" feature.

Replace USR

While you are in View USR mode, you have the option to Replace a USR. USRs with any edit status can be Replaced. However, USRs with an unsubmitted or submitted web status cannot be replaced.

To replace a USR:
- Hit the "Replace" button at the top of the screen
    - The system will copy the USR, add the Replacement indicator and lock some of the key header information. The reason for this lock out is that the Bureau identifies which USR to replace based on the key policy information and if it is changed, we won't be able to locate the USR to replace. If you need to change the policy key, use the Correct feature.
- You can then navigate through the Header, Exposure and Loss screens making your changes.

Manage USR User Guide

<u>Exposures</u>

Exposures can be modified by:
- Adding a new exposure record- Enter the data on a new record and click the "Add Expo" button to the right of the row.
- Updating an existing exposure record- Click the "Edit" option to the right of the exposure row. Make the appropriate changes and click the Save option to the right of the exposure row. If you make changes and decide not to save them, click the Cancel option to the right of the exposure row.
- Deleting an existing exposure record- Click the "Delete" option to the right of the exposure row. You will receive a confirmation pop-up. To delete the exposure record, hit OK. If you do not want to delete the exposure record, hit Cancel.
- Adding another split- In the empty split fields below the last entered exposure section, enter the new split number and click the "Add Split" button. From there you can enter the appropriate exposure data.

When you have finished, you can then calculate your exposure totals by hitting the "Calculate Totals" button at the bottom of the exposure screen. Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

<u>Losses</u>

Losses can be modified by:
- Adding a new loss record- Input the loss information and hit "Add Loss".
- Updating an existing loss record- Select the loss you would like to change and change the information in the fields below the list. Once you have made your changes, hit "Update Loss".
- Deleting an existing loss record- Select the loss you would like to delete and click the "Delete" option to the right of the loss row. You will receive a confirmation pop-up. To delete the loss, hit OK. If you do not want to delete the record, hit Cancel.

When you have finished, you can then calculate your loss totals by hitting the "Calculate Totals" button at the bottom of the loss screen. Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are

USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

Note: Group claims cannot be added or corrected in Manage USR.

Save/Cancel

When you have completed your USR, you may save the USR by hitting "Save" located at the top of the screen. If you choose not to save your changes, you can hit "Cancel" also located at the top of the screen. A pop up asking you to confirm your wish to cancel will appear. If you click "OK" you will cancel the modification and you will be returned to the last search screen you were using and you will have lost your changes. If after you have saved, you want to make another change, you can use the "Modify" feature.

Modify Unsubmitted USR

Modify is only available if a USR is in an Unsubmitted status. While in view USR details, click the "Modify" button at the top of the screen.

To modify any of the available header fields, click on that particular field and enter your change.

Exposures

Exposures can be modified by:
- Adding a new exposure record- Enter the data on a new record and click the "Add Expo" button to the right of the row.
- Updating an existing exposure record- Click the "Edit" option to the right of the exposure row. Make the appropriate changes and click the Save option to the right of the exposure row. If you make changes and decide not to save them, click the Cancel option to the right of the exposure row.
- Deleting an existing exposure record- Click the "Delete" option to the right of the exposure row. You will receive a confirmation pop-up. To delete the exposure record, hit OK. If you do not want to delete the exposure record, hit Cancel.
- Adding another split- In the empty split fields below the last entered exposure section, enter the new split number and click the "Add Split" button. From there you can enter the appropriate exposure data.

When you have finished, you can then calculate your exposure totals by hitting the "Calculate Totals" button at the bottom of the exposure screen. Please note that the

totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

Losses

Losses can be modified by:
- Adding a new loss record- Input the loss information and hit "Add Loss".
- Updating an existing loss record- Select the loss you would like to change and change the information in the fields below the list. Once you have made your changes, hit "Update Loss".
- Deleting an existing loss record- Select the loss you would like to delete and click the "Delete" option to the right of the loss row. You will receive a confirmation pop- up. To delete the loss, hit OK. If you do not want to delete the record, hit Cancel.

When you have finished, you can then calculate your loss totals by hitting the "Calculate Totals" button at the bottom of the loss screen. Please note that the totals are based on previously accepted USRs the Bureau has in our system. Manage USR will then add and subtract based on the changes made on the report you are creating. If there are USRs in rejected status, the calculated totals will not take them into account. You can override the calculated totals by going to the field and entering your totals.

Note: Group claims cannot be added or corrected in Manage USR.

Save/Cancel

When you have completed your USR, you may save the USR by hitting "Save" located at the top of the screen. If you choose not to save your changes, you can hit "Cancel" also located at the top of the screen. A pop up asking you to confirm your wish to cancel will appear. If you click "OK" you will cancel the modification and you will be returned to the last search screen you were using and you will have lost your changes. If after you have saved, you want to make another change, you can use the "Modify" feature.

Manage USR User Guide

WCSTAT File

USRs can be added to the Current WCSTAT File at any time. From there they can be transmitted to the Bureau or downloaded to your PC in WCSTAT format. When you are done creating a new submission, a correction, a replacement or modifying an unsubmitted USR, it can be added to the WCSTAT file. You can also add USRs that have been processed at the Bureau to the WCSTAT file. The USRs will remain in "Current WCSTAT File" until you remove them.

The "Add to WCSTAT File" button can be accessed on the search and view screens.
- To add to the WCSTAT file from the search results screen:
    - Select the USR(s) to be added and then hit "Add to WCSTAT File" button.
- To add to WCSTAT from within the USR
    - Hit the "Add to WCSTAT File" button while in View USR Details mode.
- You will get a pop up dialogue box stating that the selected USR(s) have been added to the WCSTAT file list.

You can navigate to the Current WCSTAT File by clicking the link in the top right corner. The Current WCSTAT File will display a list of all USRs currently added to the WCSTAT file. From the WCSTAT file list, you will be able to transmit USRs to the Bureau, Save/Download a file to your pc for your personal use, or Remove from the list.

We caution users to update their systems with any changes submitted to the Bureau via this application to keep our systems in sync. Downloading a WCSTAT file provides this capability. We would like to caution you about downloading USRs with an unsubmitted status, because changes may be made subsequent to the download. So, the unsubmitted version is not necessarily final. We recommend downloading USRs created within the Manage USR application after they have been submitted to ensure you are downloading the version that was submitted to the Bureau.

Please note that all USRs being transmitted must first be added to the WCSTAT file.

All USRs will remain in WCSTAT File until it they are physically removed. In order to remove a USR from WCSTAT File, you must check off the box adjacent to that particular unit and then click the Remove from WCSTAT File button.

Transmit to Bureau

You can transmit USRs that were created in the Manage USR application to the Bureau from within the WCSTAT file. All USRs you wish to submit must be added to the

WCSTAT file (see WCSTAT file section). You can access the WCSTAT file from the menu option located at the top of the screen called "Current WCSTAT File". You can then select the USRs you wish to submit. To select all, use the check box at the top of the list. Or you can select one or more USRs individually.

Only USRs with an Unsubmitted status can be Transmitted to the Bureau. If a user tries to submit one or more USRs with a status other than Unsubmitted, they will receive an error and will be forced to remove these prior to submission.

Once you have selected your USRs to submit, hit the "Transmit to Bureau" button. You will receive a confirmation message as well as see the status of those USRs change to Submitted.

My List

My List is a tool that can be used to assist you in managing your data. You have the ability to add any USR to My List when you are in any of the search screens or viewing the USR details. You can add a USR to My List at any time. USRs will remain on My List until you remove them.

To add a unit to My List:
- Check the box adjacent to that USR
- Click the "Add to My List" button

To view My List and the USRs in it:
- Click My List which is located in the top right hand corner of the screen
- Once in My List you will see a list of all the USRs that you have added.
    The status column will be updated once the status of the unit changes. For example, if you created a USR (whether in Correct, Replace or a New Submission) and added it to My List, after submitting to the Bureau you will notice that the status will change from Submitted to one of our various edit status' after it has been processed by the Bureau.

From My List you have the following options:
- Add to WCSTAT File
- View USR Detail
- Print USR
- View Errors
- Remove From My List

Manage USR User Guide

All USRs will remain in My List until it they are physically removed. In order to remove a USR from My List, you must check off the box adjacent to that particular unit and then click the Remove from My List button.

Note: MyList in Manage USR is separate from MyList in Error Reports. MyList in Manage USR is only accessible in Manage USR. MyList in Error Reports is only accessible in Error Reports.

Contact Us

For assistance with the Secure Online Services Account (SOSA) area and access to the Manage USR product, please contact the Group Administrator within your company. If you do not know your Group Administrator and need assistance, please contact WCRIBMA Technical Support at WCRIBMA-TechSupport@wcribma.org.

For questions on how to use Manage USR, or questions regarding the data within Manage USR, please contact your assigned Data Operations Representative or Debby Dohl at ddohl@wcribma.org