



PENNSYLVANIA COMPENSATION RATING BUREAU

POLICY DATA VALIDATION RESULTS

Issued December 15, 2015

ACCESSING POLICY DATA VALIDATION RESULTS

Effective January 1, 2016, the PCRB will discontinue sending hardcopy criticism letters. Carriers will be responsible for accessing their criticism letters electronically. The Policy Data Manager (PDM) provides access to validation results (criticism letters) in various formats such as on-screen messages, Microsoft Excel spreadsheets, .pdf, WCCRIT, or to establish an electronic feed of WCCRIT through the Central Data Exchange (CDX). PDM also contains various validation reports which provide users with a global view of their most frequent errors so that carriers can potentially identify and resolve systemic issues.

1. Validation Results

Validation results can be accessed on an individual transaction basis, as a collection of multiple transactions, or in the form of a management report.

a. Viewing Individual Transaction Results

To view results at the policy transaction level, the user should search for and select a specific policy transaction. Once in a particular transaction the validation results are displayed on the lower half on the screen. These results can be viewed on-screen OR can be exported as WCCRIT or viewed as a .pdf document. See the circled areas in the diagram below. Note that the validation results are shown in real-time and may vary by “tab.” If you are on the *Information Page* tab, ALL errors will be displayed and if you are on the *Exposures* tab, for example, only the results for the relevant record type will be displayed. However, when you export the information, all results will be provided. Users are encouraged to use the filter buttons as needed to isolate the specific types of errors.

The screenshot displays the PDM interface with the following sections:

- Information Page** (selected tab)
- Header Information**: Expiration Date (4/1/16), Policy Term (1 - Standard One-Year), Type of Plan (1 - Voluntary Policy), Legal Nature (03 - Corporation), Field Wrap-up (2 - Non-Wrap-Up/Non-OCIP Policy), Retrospective Rating (3 - Not Retro Rated), Header Change Effective, Producer Name, Prior Policy Number, Other Legal Nature, Coverage Type Code (01 - Standard WC), Employee Leasing Type (1 - Non-Employee Leasing), Expiration Date.
- 3A Coverage States**: PA
- 3B Policy Limits**: Bodily Injury by Accident (100), Bodily Injury by Disease (500), Bodily Injury by Disease (100).
- 3C Other States Coverage**: States Excluded: IND, OH, WA, WY
- 4 Premium Information**: Minimum Premium Amount (123), Est. Std. Premium Total (123), collected in, Deposit Premium (123).
- Business Rules**: PDM Review Accepted with Critical Errors - Carrier Action Required as of 7/16/15

Record Type	Error Code	Toler	Error Message
05/Exposure	05051509 {37109651011 }	Critical	Unauthorized Class 0965 used
01/Header	01295003 {1}	Priority	Missing required PolicyChangeExpirationDate
057Exposure	05000003 {37109991011 }	Conditional	Authorized Classes 0651, 0938, 0951, 0953, 9740, 9741.

Buttons: Inquiry, WCCRIT, PDF

Filter by Record Type: All Record Types | Min. Severity: Warning

Viewing Multiple Transactions Results

To view the results for multiple transactions, the user must select the desired criteria from the search screen. The transactions that meet your search criteria will be returned and displayed on the lower half of the page. Users can then select to export the results into Excel or a WCCRIT flat file.

POLICY DATA MANAGER

Home Search Create Import Submit Reports Help

POLICY SEARCH CRITERIA

Policy Identifiers

State:

Carrier:

Policy Number:

Policy Effective: 4/1/15 to 4/1/15

WCPOLS Link:

Show Most Recent Only

Transaction Identifiers

Issue Date: to

Transaction:

PDM Status:

Process Date: to

Review:

PDM User:

File Search

File Number:

Insured FEIN:

Insured Name:

City, ST or ZIP:

Review Error:

Endorsement:

Search Max. Results: 50 Clear

Business Rules:

Search Results - 4 txns

ST	Carrier	Policy Number	Eff. Date	Change Eff.	Issue Date	Transaction	Status	Processed	Review	User	File Nbr	Insured FEIN	Insured Name
<input type="checkbox"/>	PA	15066 0123456	4/1/15	4/1/15	7/21/15	01/New	Processed	7/21/15	Accepted		3356595	000200030	PDM TESTING TWO
<input type="checkbox"/>	PA	15066 09878543	4/1/15	7/17/15	7/17/15	05/Cancel	Submitted		Accepted	DCO	3356595	000200030	PDM TESTING TWO
<input type="checkbox"/>	PA	15066 098786543	4/1/15	4/1/15	7/21/15	10/Nonrating Chg	Processed	7/21/15	Accepted		3356595	000200030	PDM TESTING TWO
<input type="checkbox"/>	PA	15066 12345678	4/1/15	4/1/15	7/16/15	10/Nonrating Chg	Submitted		Critical Errors	DCO	3356598	000100020	PDM TEST ONE

Page 1 of 1 Results per page: 20

Delete Excel WCPOLS WCCRIT Download WCCRITviewer

c. Viewing Management Reports

Contained within PDM are various reports designed to help the user better manage their data. To view these reports, click on the “Reports” menu item located on the main menu bar. This menu item contains several reports to help the user isolate data reporting issues. See below.

PCRB Pennsylvania Compensation Rating Bureau

POLICY DATA MANAGER

Home Search Create Import Submit Reports Help

2. Working with Different File Formats (.xlsx, .txt and .pdf)

Different carriers consume criticisms in different ways. Based on carrier feedback, we have tried to anticipate this and offer multiple options (and tools) to assist the user in tracking their criticisms.


A. Excel

Users can export their validation results into an Excel spreadsheet. By exporting your results in an Excel spreadsheet, users have flexibility to sort and format their validation results based on their individual workflow. Exporting to Excel is a good choice for those users that like to work from a control list.

B. WCCRIT Files

WCCRIT is a recognized industry standardized record layout used for the distribution of policy error information. WCCRIT is maintained by the WCIO and included in the Workers Compensation Data Specification Manual. Users should refer to the WCIO website at www.wcio.org for detailed information on this product. Since WCCRIT is essentially a text file, it is a file that needs to be converted and viewed using additional applications. For those carriers who have built their own applications, WCCRIT can be loaded into those applications. WCCRIT can be “picked-up” two ways. See below.

a. WCCRIT via PDM

A user can export WCCRIT from within PDM. WCCRIT can be exported on an individual transaction basis or in bulk to include criticisms for multiple policy transactions. WCCRIT is available for download throughout PDM where the WCCRIT icon appears. Users should look for this icon: 

A WCCRIT button appears on the following screens:

1. Viewing a transaction (WCCRIT for individual transaction)
2. Search Results (WCCRIT for multiple transactions)
3. Submission Results (WCCRIT for multiple transactions)
4. Processed Results (WCCRIT for multiple transactions)

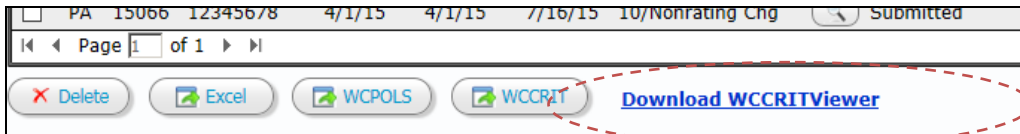
b. WCCRIT via CDX

A user can pick up their WCCRIT files in CDX by registering with both the PCRB and CDX to receive their WCCRIT files by way of FTP. Once the service with the PCRB and CDX has been established, users can pick up their WCCRIT file in CDX within several days of submission.

C. PDF Documents

Since PDM validates transactions in real time, it is not efficient or practical for PDM to generate .pdf's for *thousands* of transactions. PDM only allows users to generate criticism letters in a .pdf format on a one-off basis. **However, the PCRB recognizes there are users that may prefer to work from "hardcopy." Accordingly, the PCRB has developed an auxiliary application that will translate WCCRIT files, and create a .pdf file so that users can view or print their criticism letters from their desktops. Note that this viewer is available at no additional cost.**

To install the .pdf viewer on your computer, the user should click on the "Download WCCRITViewer" link located at the bottom of the Search Results page. See below.



Once you click on the link, the user should follow the step-by-step instructions for installing the viewer.

3. Policy Edits

PCRb policy data reporting edits have been vastly expanded, and are performed in real-time in PDM. The PCRb is committed to improving data quality throughout the entire data reporting life cycle, and believes that better initial policy submissions will lead to better unit statistical report submissions. The PDM Edit Matrix, which provides a complete list of applicable policy edits, is available within PDM and in the Data Reporting section of the PCRb website. Users are encouraged to familiarize themselves with the list of edits and work towards resolving critical errors within 30 days of the processed date.

Note: This document is intended to educate you on how to access your policy reporting criticisms. For help resolving a specific criticism(s), carriers are encouraged to contact the PCRb through the "Inquiry" button within each transaction which will generate an email to the PCRb's Policy Review department. Users should look for the "inquiry" button shown below.

