Indemnity Data Manager

User Guide

Delaware Compensation Rating Bureau, Inc.

Pennsylvania Compensation Rating Bureau

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TABLE OF CONTENTS

A. INTRODUCTION

Welcome to the Indemnity Data Manager (IDM) web application! IDM allows for submission tracking and data quality management of Indemnity Data transaction information.

IDM provides users the ability to:

- Monitor status of indemnity submissions
- View and/or export editing and validation results in various formats
- Search and view indemnity transactions and histories

This guide will provide an overview of the functions available to carriers within IDM and helpful hints for using the application. It is recommended that the user read this entire document before using IDM.

B. SYSTEM REQUIREMENTS

Users of the Indemnity Data Manager must have access to the internet. For the best experience, we recommend that you use the latest version of Google Chrome. Some functions are not supported when using a different web browser.

C. PRIVACY AND SECURITY STATEMENT

Carriers may view the DCRB/PCRB *Privacy and Security Statement* within the application. The login screen for the **Application Login** contains a **Privacy** link that will provide access to the *Privacy and Security Statement*.
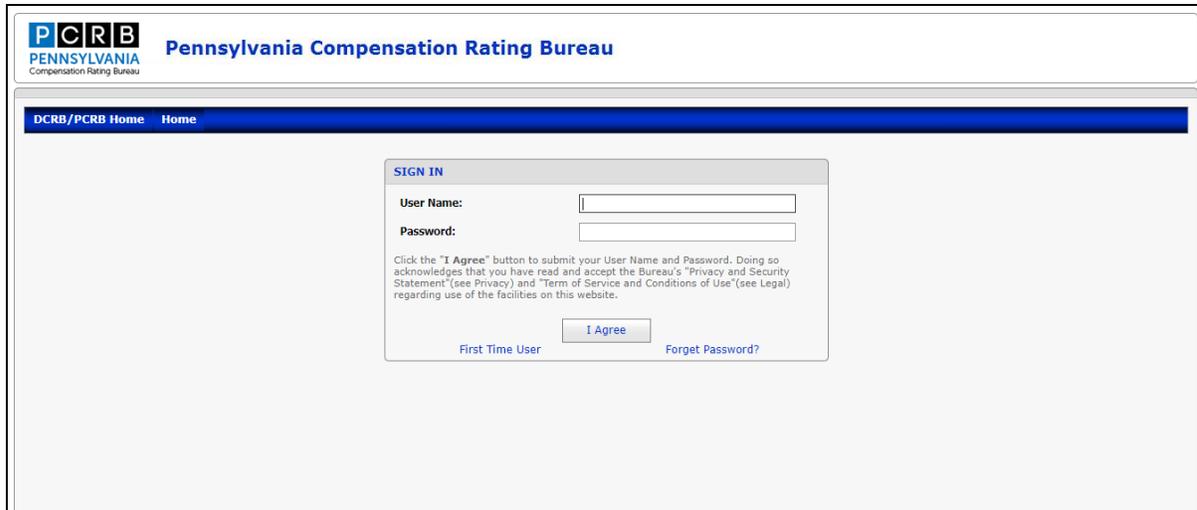
D. ACCESSING INDEMNITY DATA MANAGER

The Indemnity Data Manager is located within the Application Login area of the PCRB/DCRB website. The Application Login provides access to all of the secured applications and data on the DCRB/PCRB website.

The direct website for the Application Login is: https://www.pcrbdata.com/ul. The Application Login can also be accessed via a link on the DCRB/PCRB homepage, www.pcrb.com or www.dcrb.com.
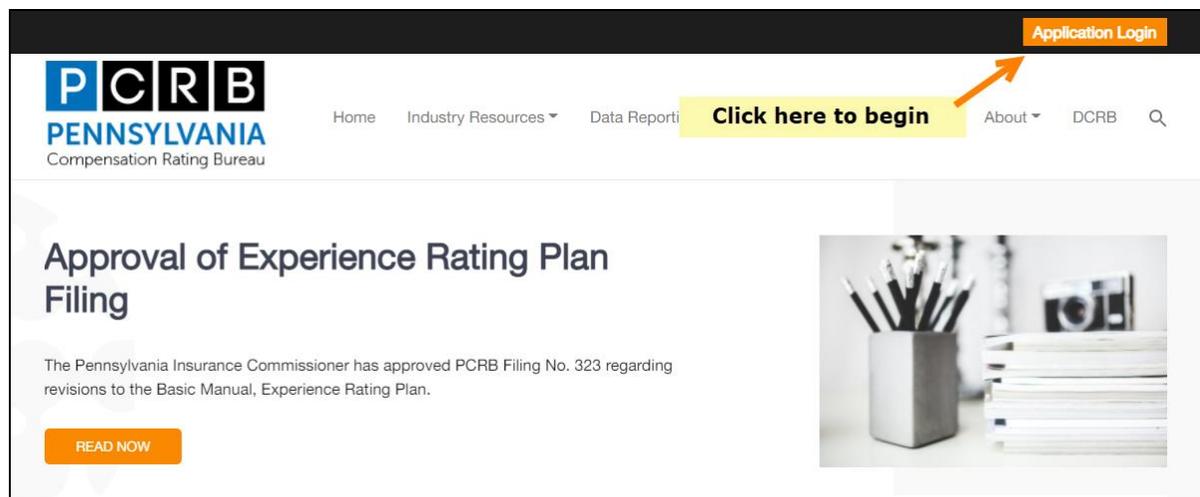
Registered Carrier Group Users should enter their **User Name** and **Password**. The password field is case-sensitive. You must read the paragraph below these fields and click the **I Agree** button to proceed.


If you are not a registered user, click on the **First Time User** link and complete the registration form as a *Carrier Group User*.
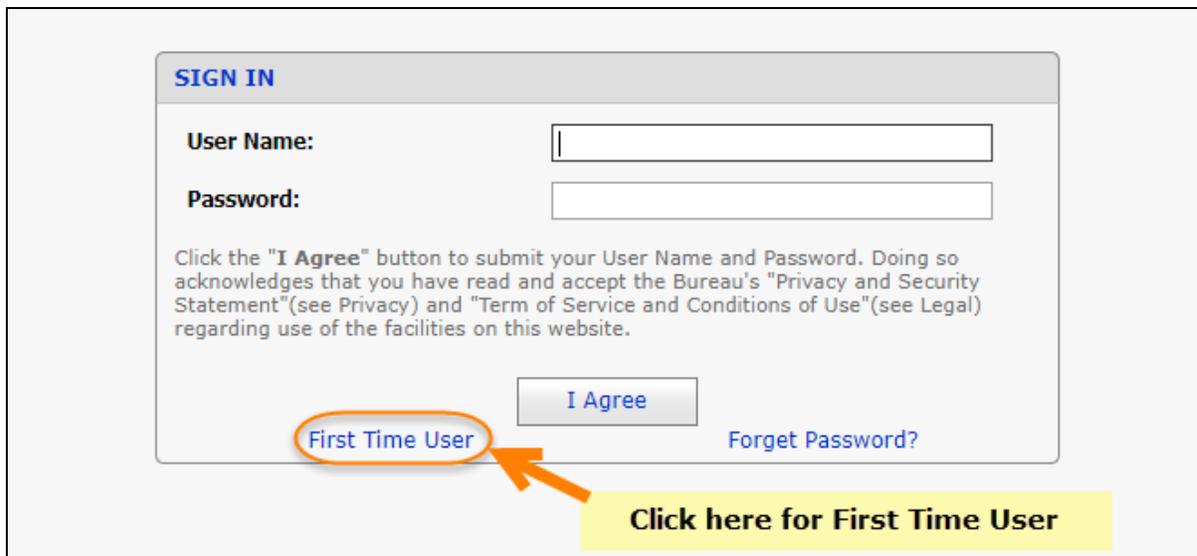
Indemnity Data Manager is available to those carrier groups (and their designated vendors) who are eligible to report the Indemnity Data Call. As a Carrier Group User, you may request access to IDM from your Carrier Group Administrator (CGA). Once signed into the Application Login, click on **Request Access** > **To Application** and select **Indemnity Data Manager** from the list of available applications. After requesting access, your CGA will be notified and then have the ability to approve/reject your request for access. Contact DCRB/PCRB Central Support if you experience any issues with access to the application.

Once successfully logged in, the user will observe the Application Manager home screen. Select **Indemnity Data Manager** to launch the application.
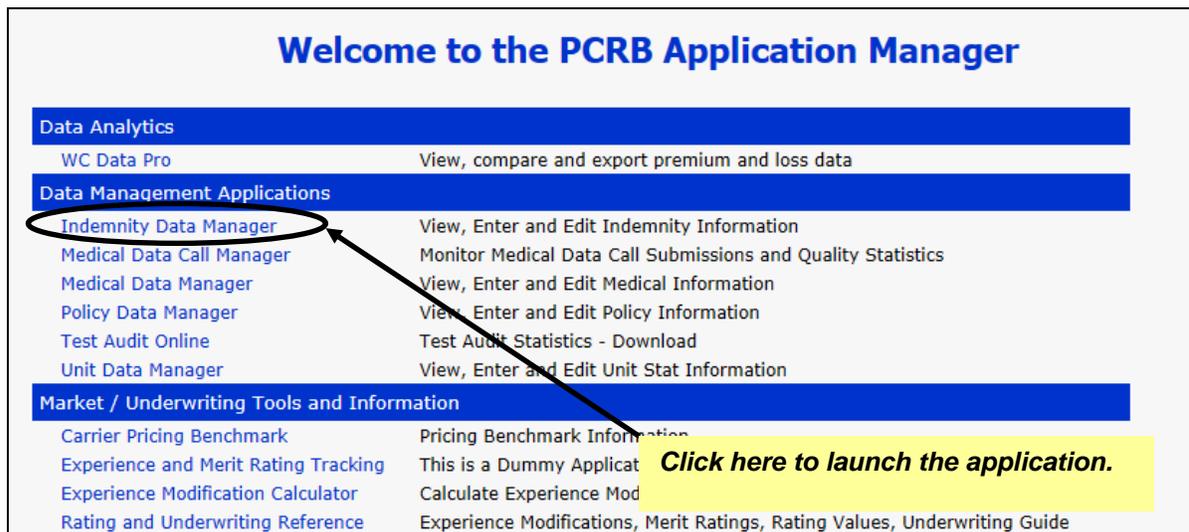

E. NAVIGATING INDEMNITY DATA MANAGER

IDM was designed with an intuitive user interface that makes it easy to check the status of indemnity submissions and view indemnity transactions and histories. This section provides an overview of the interface and explains some rules about navigating in IDM. Each of the individual navigation menus will be described in more detail later.

IDM serves as a companion product to the Policy Data Manager (PDM), Unit Data Manager (UDM), and Medical Data Manager (MDM). If the user has authorization to PDM, UDM, MDM, and IDM, the user can easily toggle between these applications. Click on the "POLICY" button to launch PDM, the "UNIT" button to launch UDM, or the "MEDICAL" button to launch MDM. The button is disabled for applications that the user is not authorized for access.

The first screen that appears for all users upon logging into IDM is the 'Quick Find' screen. The user can navigate back to this screen at any time by clicking the home icon as seen above.
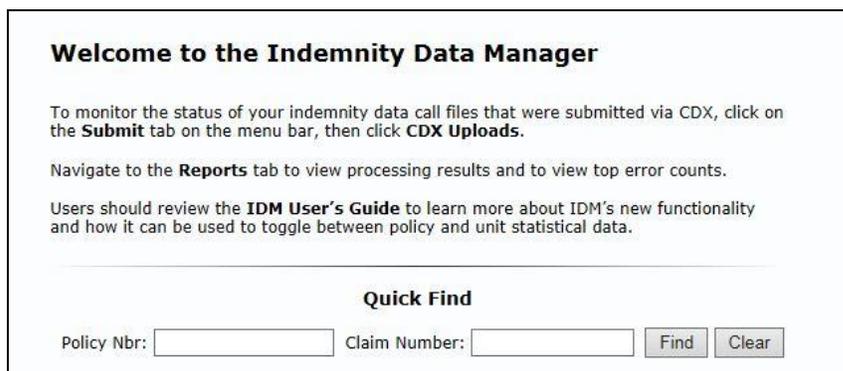
Users can select from various main menu drop downs from any screen.

1. **MAIN MENU**

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

   Home

   - Selecting **Home** routes the user back to the Application Manager home screen.

   Search

   - **Txns** – Retrieve any transactions that exist in IDM. Initiates a search for transactions using any of the criteria entered on the screen and transaction-specific filter criteria can be defined to narrow the search. The transaction details can be accessed from the search results.

   - **My List** – Search for active transactions by the current user.

   - **Last Processed** – Shows all transactions that were processed in the most recent batch.

   Submit

   - **Submit File -** Allows the user to select a WCIND file to upload and submit for processing.

   - **CDX Uploads** – View prior WCIND submissions uploaded via CDX.

   Reports

   - **Processing Results** – View the status of the latest transactions processed. The user can download WCIND or WCCRIT files and export the results to Excel.

   - **Top Critical Errors** – View a listing of the top critical errors by processed date. The results can be exported to Excel.

   - **WCEIND Stats** – View a listing of all error codes and a count by error. The report can be exported to Excel.

   Help

   - **Preferences** – A user can setup their preferences for search results, email reminders and sidebar notes.

   - **User Guide** – Routes users to the IDM User Guide.

- **WCEIND Errors** – A listing of WCEIND error codes applicable to PA and DE with the WCIND record type, tolerance and the error message. The report can be exported to Excel.

- **WCIO Records –** A listing of the applicable WCIND Record with their description and minimum record length. The report can be exported to Excel.

- **Email Support –** This selection will generate an email to DCRB/PCRB Central Support from the users email account.

2. **QUICK FIND**

The Quick Find page allows users to execute a quick search for transactions using policy number. The user can also search for an individual Claim by using the Claim

Number. To navigate to the Quick Find page, click the home icon 🏠 above the main menu.

The Quick Find page displays the following search criteria:

- **Policy Nbr** – The user can search for a transaction using an existing policy number.

- **Claim Number** – The user can search for a transaction using an existing claim number.

When the search is executed, all transactions matching the entered criteria will be returned in the results grid and the policy number is a hyperlink that will navigate the user to the details of the transaction selected.

Quick Find

Policy Nbr: B2012   Claim Number: [   ]   [Find] [Clear]

Policy History for Policy #B2012

State	Eff. Date	Exp. Date	Cancelled	Carrier	Policy Nbr	File Nbr	Insured Name
DE	3/27/14	3/27/15		15066	B2012	2222222	TEST

If no information is found for the entered criteria, a message will display that no matching data was found for the entered search criteria.

Quick Find

Policy Nbr: [1   ]   Claim Number: [   ]   [Find] [Clear]

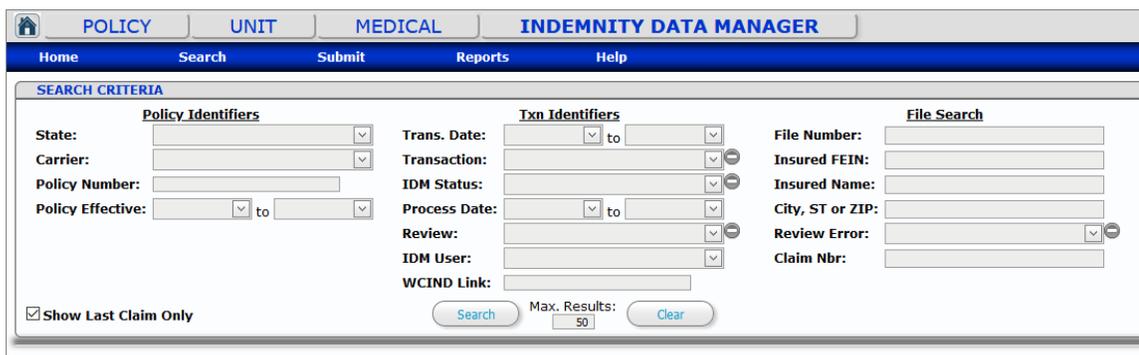**Policy History for Policy #1**

No matching policies found

F. SEARCHING FOR TRANSACTIONS

The Search page allows users to search and then view indemnity transactions previously submitted to IDM. Transaction-specific filter criteria can be defined to narrow the search. From the search results, the transaction details can be accessed by selecting the view (🔍*magnifying glass*) icon.

1. SEARCH CRITERIA

The Search page displays fields that allow specific search criteria to be selected. When the search is executed, all transactions matching the criteria will be returned in the search results.

Any combination of search criteria can be used together to narrow the search results. Text fields such as Insured Name, City or Policy Number will match records using "contains" logic, i.e. those records that *contain* the letters or words entered—not an *exact* match. To perform a wildcard search, key an asterisk (*) before or after the text you are searching to widen your search results.

The filter criteria that can be selected are:

State – PA or DE can be selected. If left blank the search will look for matching criteria for both states.

Carrier – Select one or more carriers to use in the search.

Policy Number – Enter the policy number. The Policy Number must contain at least three characters.

Policy Effective – Enter or select from the calendar the policy effective date range. Note: To search for a single policy effective date, the same date must be entered in both the 'from' and 'to' date fields. To search for a specific policy effective date and forward leave the 'to' date field blank.

Trans. Date – The search returns transactions that were issued within the date range specified. Note: To search for a single transaction date, the same date must be entered in both the 'from' and 'to' date fields. To search for a specific issued date and forward, leave the 'to' date field blank.

Transaction – The search returns transactions based on the transaction code selected or excluded. Transaction types can be excluded by using the ⊖ beside the criteria.

IDM Status – The search returns transactions based on the IDM status selected or excluded. Status types can be excluded by using the ⊖ beside the criteria.

Process Date – The search returns transactions that were processed within the date range specified. Note: To search for a single processed date, the same date must be entered in both the 'from' and 'to' date fields. To search for a specific processed date and forward, leave the 'to' date field blank.

Review – The search returns transactions based on the review status selected or excluded. Review types can be excluded by using the ⊖ beside the criteria.

IDM User – The search returns transactions that were created or edited by the selected user or users.

WCIND Link – The search returns transactions that match the unique DCRB/PCRB assigned identifier.

File Number – The search returns transactions where the DCRB/PCRB File Number matches or begins with the value entered.

Insured FEIN – The search returns transactions that match the primary insured FEIN number.

Insured Name – The search returns transactions that match the primary insured name.

City, ST, or ZIP – The search returns transactions that match the primary insured address.

Review Error – The search returns transactions that have produced the selected error(s).

Claim Nbr – The search returns transactions that match the claim number entered.

Max. Results – Specifies the maximum number of results to return, which defaults to 50; but can be increased up to 200, if necessary.

Clear – This will clear all criteria fields to allow new criteria to be entered.

Show Last Claim Only – This will limit the search results to the most recent Claim. This checkbox defaults to "checked" for carrier users.

2. **SEARCH RESULTS**

After search criteria have been entered, select the **Search** button and the search results grid displays all transactions matching the specified criteria.

	ST	Carrier	Policy Number	Eff. Date	Trans. Date	Claim		IDM Status	Processed	Link	Review	User	File Nbr
	DE	15066	B2014	3/27/14	5/8/20	E0G1111	🔍	Processed	5/8/20	2005O8I0006147	ⓘ Minor Errors		
	DE	15066	B3324	7/1/04	5/8/20	AKR4332	🔍	Processed	5/8/20	2005O8I0006040	ⓘ Minor Errors		2273100
	DE	15066	B986X	1/1/07	5/8/20	CDH3777	🔍	Processed	5/8/20	2005O8I0006061	ⓘ Minor Errors		
	DE	15066	B807K	5/18/95	5/8/20	D6F0230	🔍	Processed	5/8/20	2005O8I0006066	ⓘ Minor Errors		
	DE	15066	B8H21	7/13/19	5/8/20	FMY4224	🔍	Processed	5/8/20	2005O8I0006131	ⓘ Minor Errors		
	DE	15066	B7440	10/1/13	5/8/20	EFB1333	🔍	Processed	5/8/20	2005O8I0006000	ⓘ Minor Errors		5510755
	DE	15066	B823K	2/1/05	5/8/20	ABT9000	🔍	Processed	5/8/20	2005O8I0006122	ⓘ Minor Errors		
	DE	15066	B3K92	4/1/19	5/8/20	FMJ3333	🔍	Processed	5/8/20	2005O8I0006111	ⓘ Minor Errors		3433140

Search Results - 8 Txns

Page 1 of 1 — Results per page: 20

The bottom left-hand corner displays the grid page numbers. Select the arrows to navigate forward and backward through the results pages.

The bottom right-hand corner displays the results per page. Use the dropdown to display more results on a single page.

Results can be sorted by selecting a column heading; the records will be sorted by the column values in ascending order. To reverse the sort order, select the column heading again.

The search results bar above the grid will display how many records have been returned.

These search results can be customized using the **Preferences** link under the **Help** menu.

Search Results Columns:

ST – The state code reported on the transaction.

Carrier – The NCCI carrier ID reported on the transaction.

Policy Number – The policy number reported on the transaction.

Eff. Date – The policy effective date reported on the transaction.

Trans. Dt – The date the transaction was issued.

Claim – The claim number reported on the transaction.

IDM Status – The current IDM status of the transaction.

Processed – The date the transaction was processed.

Link – The unique PCRB/DCRB WCIND Link associated with the transaction.

Review – The current review status of the transaction. The ⓘ *(information)* button allows the user to see the errors on the transaction by hovering over the icon. Selecting the information button will open a small window that lists all the errors.

User – The name of the person who last edited the transaction in IDM.

File Nbr – The DCRB/PCRB file number associated with the insured.

3. VIEW TRANSACTION DETAILS

To view transaction details, select the view (🔍 *magnifying glass)* icon.

4. EXPORT TRANSACTIONS

To export the search results, check off the desired results and click on the buttons at the bottom of the page. This will open the results in the chosen format which can then be copied into another program if needed.

The available export options are

a) Excel
To export the search results to Excel select the Excel button. The results (up to 1,000) will be exported to an Excel file that can be opened or saved.

b) WCIND
The user can select one or multiple transactions (up to 200) to download into the WCIND format by checking the checkbox in the far left column and then selecting the WCIND button. A WCIND file will be generated that contains the selected transactions. The file can be saved or opened.

c) **WCCRIT**
The user can select one or multiple transactions (up to 200) to download any applicable errors for the transaction into WCCRIT format by checking the checkbox in the far left column and then selecting the WCCRIT button. A WCCRIT file will be generated that contains the criticisms for the selected transactions. The file can be saved or opened.

G. SUBMISSION TRACKING

To view previously submitted WCIND files through CDX, a user can navigate to the **Submit → CDX Uploads** screen and view the information associated with previously submitted files (if any exist.)

Each unique data submission appears as a row in the Submitted Files grid. The following column headings can be adjusted to narrow down the results:

Timestamp – Date and time the file was received

Carrier - The NCCI number associated with the data file.

Reporting Year/Qtr – The year/quarter reflected in the data file.

File Name - The unique file name given by the data submitter on the file control record.

View (🔍 *magnifying glass)* icon – Displays the transaction associated with each file and the processing information.

#Txns – Number of transactions (records) in the data file.

**#Crit –** Number of critical edits in the data file.

#Pri – Number of priority edits in the data file.

ⓘ (*information button*) – Displays summary data quality edit results for the data file.

Status – Displays the files processing status.

File ID – The unique file ID given by the submitter on the file control record.

If the user does not specify any filtering criteria, then all submissions that the user has access to will be displayed. To view older data files, adjust the **Since** date at the bottom of the screen.
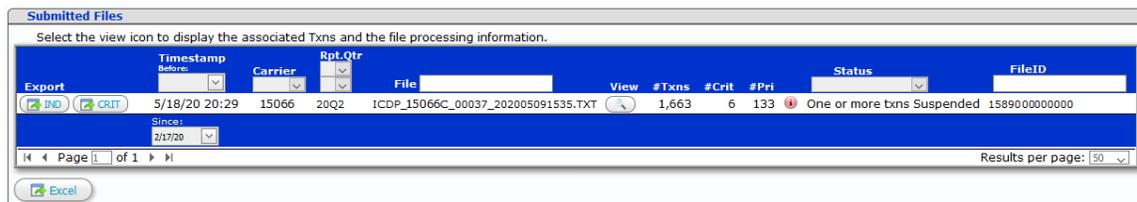
Clicking on the ⓘ (information button) will display summary data quality editing results for each file.

Clicking on the edit number in the WCEXXX column will link to another screen which displays the transactions which had that specific edit.

If the user selects the view (🔍 *magnifying glass)* icon on the CDX Uploads (Submitted Files) screen, IDM will display the transactions associated with the file and the processing information.

H. VIEWING TRANSACTION DETAILS

From either the search results page or the submission tracking screen (CDX Uploads), the contents of an individual indemnity transaction can be viewed by selecting the view (🔍 *magnifying glass*) icon on the row for that transaction.

1. **POLICY KEY FIELDS**

This screen displays policy information related to the indemnity transaction.

2. **CLAIM CALLS**

The Claim Calls tab displays further details about the indemnity transaction. Selecting the view (magnifying glass) icon next to the Line ID Number will open a separate Claim Call tab showing details for that particular transaction.

WCIND Data Call	
2. Transaction	Original
3. Transaction Date	04/02/2020
5. Carrier Code	15066
6. Policy Number	2000000
7. Policy Eff. Date	07/31/2016
8. Claim Number	2222333333
9. Accident Date	07/07/2017
10. Jurisdiction	37/PA
11. Transaction From/To Date Range	03/30/2020 - 04/05/2020
13. Transaction Amount	543.54
14. Benefit Type	05/Temporary Total
15. Lump Sum Indicator	N
16. Benefit Offset Code	0
17. Benefit Offset Amount	0
18. Weekly Benefit Amount	543.54

3. **HISTORY**

The History tab displays all reported indemnity transactions associated with the policy.
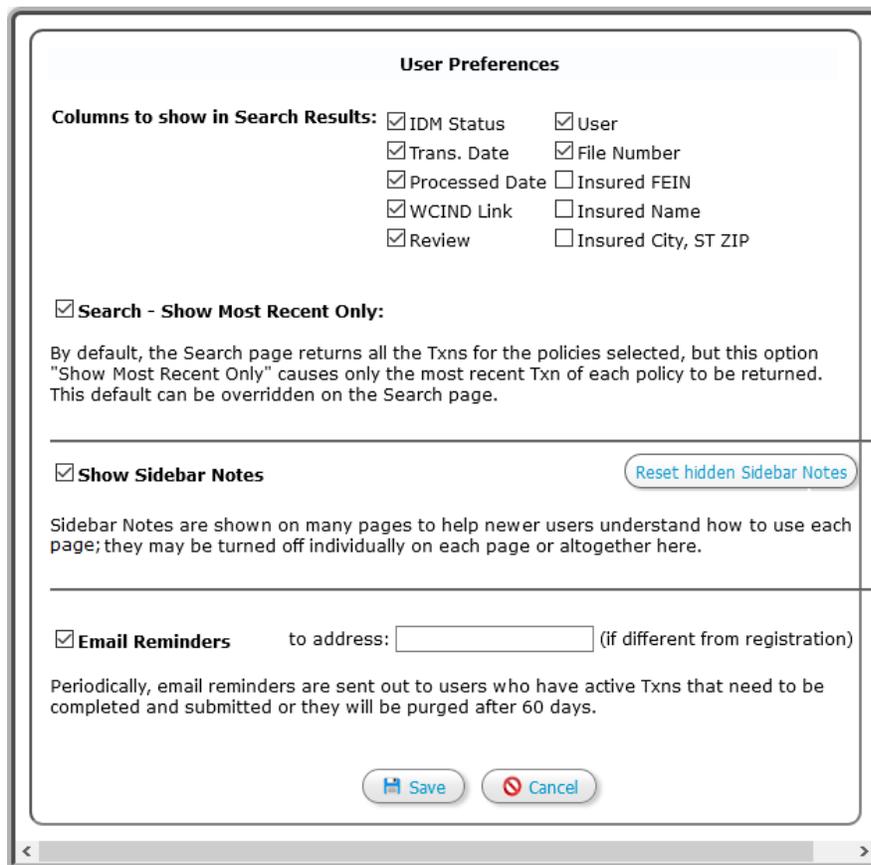
I. TRANSACTION CRITICISM REPORT

Transactions with a Review Status other than Accepted will have a criticism report available. While viewing the Transaction, the user can download any applicable errors for the transaction into WCCRIT format by selecting the **WCCRIT** button or generate a PDF of the criticism letter by selecting the **PDF** button. This will allow a user to view and print all errors that were generated for this transaction.

		IDM Review: Accepted With Minor Errors - Further Action May Be Required as of 5/18/20		
Record Type	Lvl	Error Code	Toler.	Error Message
01/IDC Transaction	-	01129532 053202fd22779d	Priority	Weekly Benefit Amount is equal to zero when Lump-Sum Indicator is N and the Benefit Type Code is related to lost wages.

Inquiry   WCCRIT   PDF   Filter by Record Type: All Record Types   Min. Severity: Warning

J. USER PREFERENCES

To change user preferences, go to **Help –> Preferences**. This screen allows the user to adjust their settings for search results, defaults, sidebar notes and also email reminders.

To turn sidebar notes off, uncheck the box next to Show Sidebar Notes. To reopen the sidebar notes that were previously marked as "Do not show again", click on Reset Hidden Sidebar Notes.

User Preferences

Columns to show in Search Results:
- ☑ IDM Status
- ☑ Trans. Date
- ☑ Processed Date
- ☑ WCIND Link
- ☑ Review
- ☑ User
- ☑ File Number
- ☐ Insured FEIN
- ☐ Insured Name
- ☐ Insured City, ST ZIP

☑ **Search - Show Most Recent Only:**

By default, the Search page returns all the Txns for the policies selected, but this option "Show Most Recent Only" causes only the most recent Txn of each policy to be returned. This default can be overridden on the Search page.

☑ **Show Sidebar Notes**   Reset hidden Sidebar Notes

Sidebar Notes are shown on many pages to help newer users understand how to use each page; they may be turned off individually on each page or altogether here.

☑ **Email Reminders**   to address: [_____] (if different from registration)

Periodically, email reminders are sent out to users who have active Txns that need to be completed and submitted or they will be purged after 60 days.

Save   Cancel

K. ADDITIONAL RESOURCES

Technical questions regarding Indemnity Data Manager should be directed to the DCRB/PCRB Central Support at (215) 320-4933 or centralsupport@pcrb.com. All other questions should be directed to Megan Ozlek, Extension 4500 or mozlek@pcrb.com, or Dawn Belfus, Extension 4478 or dbelfus@pcrb.com.