



Pennsylvania Compensation Rating Bureau

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PENNSYLVANIA TEST AUDIT PROGRAM BULLETIN #104 TEST AUDIT ONLINE

Effective July 1, 2010 the PCRB website application, Test Audit Online, was modified and enhanced. Test Audit Bulletin #103 generally described the changes that went into effect as of that date. The purpose of this bulletin is to provide additional instructions on how to use certain new features of Test Audit Online.

With the implementation of the recent changes to Test Audit Online, carriers now have the ability to retrieve their policy selection list and submit their response electronically via an **Electronic Response Form** feature. Below are instructions for how to use this new feature of Test Audit Online, as well as some explanatory information:

- Login via the **Application Login** as you normally would. Select **Test Audit Online**. (Please keep in mind that only users who have been granted access by their Carrier Group Administrator can utilize Test Audit Online.)
- On the left side of the screen you will see the following titles: Message Board, Policy Selection and Statistics. There have been no changes to the Message Board feature.

POLICY SELECTION AND RESPONSE:

A carrier group's policy selections can be viewed by going to Policy Selection Lists and then Request List. This gives you the link to the Excel sheet listing of policy selections in the same format as before. There are now two methods of response:

1. To submit a **hard copy response** form, click on **Response Form**. This opens a Word document with the associated hard copy response forms just as before. If you are submitting your response to the Bureau via scanning/e-mail or standard mail (USPS), you must print and complete the form and submit it along with the requisite audit work papers.
2. With the recent enhancements, the option of submitting your policy selection response through an **electronic policy response** form within Test Audit Online is available. The electronic policy selection response form provides for the quick and efficient submission of the information required when submitting audit work papers, including the ability to attach the requisite audit work papers.
 - From the Policy Selection Lists category select **Response Form (Electronic Response)**.

- Policy selections are listed, including the state, file number, name of the insured, group and carrier number, policy number, policy effective date, the notification date and due date. This is a searchable function, meaning you can search by file number, policy number, effective or notification date or status. This list can also be sorted however you wish by clicking the arrows at the top of any column.
- To submit an electronic response, click on the Response Form link in the first column. The top of the form is then automatically populated with certain critical identifying data.
 - The type of audit must be selected from the drop-down menu. These are the same as can be found on the hard copy form.
 - Next select the claims information from the drop-down menu, and again this is the same as the hard copy form. If a claims run is not being provided, an explanation in the comment section is required.
 - Attach the requisite audit worksheets, billing and claims information in the attachment section. You can attach files as a Word doc (.doc), .pdf, Excel (xls), Rich Text (rtf) or .txt.
 - Click submit. Upon submission a pop-up will be delivered indicating “Your test audit selection response has been sent successfully. Thank you.” An e-mail advising that your response has been received will also be delivered.
 - If there is an error with your submission, an error message in red at the top of the form will be evident. The error must be fixed, and the response resubmitted.
- The **Status** column reflects the status of the response at the time of your search. The status categories are:
 - **Not Submitted**
 - **Submitted:** response submitted but not yet reviewed by Bureau staff
 - **Under Review:** response received by Bureau staff
 - **Rescinded**
 - **Hard Copy Received**

Once a response is under review it cannot be changed. Next to the status column there is a **Date Received** column which shows the date the response was received by the Bureau, whether electronic or hard copy.

STATISTICS:

- The Statistics section has been broken into two groups - **Group Statistics and Policy Lists.**
 - **Group Statistics** provides access to a carrier group’s statistics for a given quarter, as well as the combined “all groups” statistics. The results are searchable and in an Excel format and appear in the same manner that they have in the past.
 - **Policy Lists** are also in an Excel format and list each policy included in a given quarter’s statistics, identifying which policies generated a difference.

If you encounter any problems or have questions, please contact Roxanne Walker, Senior Analyst, at 215-320-4578 or via e-mail at rwalker@pcrb.com.