June 22, 2016

DCRB CIRCULAR NO. 918

To All Members of the DCRB:

RE: **POLICY DATA REPORTING CHANGES - REMINDER**

The DCRB previously announced in Circular No. 908 the release of the Policy Data Manager (PDM) which is a web-based application for entry, edit, submission and management of policy information. That circular also announced several notable changes to policy data reporting procedures. This circular serves as a reminder notice that the following policy data reporting changes will be implemented in the months ahead.

- All policy information transactions must be submitted in a prescribed and logical sequence. For example, a New Policy, Transaction 01, must be reported before any endorsement transaction(s). The following chart provides more detail. Policy transactions submitted out of sequence **will be rejected** effective July 1, 2016.

Submit Transaction Type(s):	Before Submitting Transaction Type(s):
01 (New), 02 (Renew), 15 (Add a State)	03 (Endorsement), 05 (Cancellation /Reinstatement) or any other change transactions such as 06 (Key Field Change), 08 (Rating Change), 10 (Non-Rating Change or 14 (Miscellaneous Change).

Rejected transactions will require the carrier to submit the required policy transaction and then resubmit each subsequent transaction for the corresponding policy number. Data reporters will be notified of rejected transaction via a message on the PDM landing page and through email. The rejected transactions will be available for resubmission on PDM for 120 days from the Issue Date.

Carriers should be aware that only policy transactions 01 (New), 02 (Renew), 15 (Add a State) will be used to create a "Proof of Coverage" record for the risk. This means that any other policy transaction types will not be used for proof of coverage purposes.

- Record Types 84-89 (various change transactions) **will not be processed** by the DCRB after July 1, 2016. Changes to policy information are required to be done through a 06 (Key Field Change), 08 (Rating Change), 10 (Non-Rating Change) or 14 (Miscellaneous Change) transaction which supports the objective of accomplishing policy changes via full replacement WCPOLS transactions.

- Cancellation/Reinstatement transactions (05) must also be submitted in the correct and logical sequence. Effective October 1, 2016, Cancellation/Reinstatement Transaction 05 not submitted in proper sequence **will be rejected**. For example, a previously submitted Non-Renewal Cancellation transaction must be reinstated before an Interim Cancellation is submitted.   Likewise, a Reinstatement Transaction cannot be submitted before the Cancellation Transaction.

- PDM allows the user to view all transaction submissions which will assist the user in determining the transactions already submitted when preparing to submit another transaction. Rejection of (05) cancellation and reinstatement transactions will impact proof of coverage if the transaction(s) are rejected.

- Effective January 1, 2017, the DCRB will **no longer accept or process hardcopy policy documents**. From that date forward, any hardcopy policy documents received by the DCRB will be returned to the data submitter.

Policy data reporters are encouraged to review Circular No. 908 for any additional requirements and visit the Data Reporting section of the DCRB website at www.dcrb.com for the PDM User's Guide, PDM edit matrix, and other pertinent documents.

The above applies to all carrier data submissions, whether policy data is submitted to CDX or directly to PDM.

Please direct any questions as follows:

- Kristina Phillips, (215) 320-4430 or kphillips@dcrb.com regarding the sequencing, submission and rejection of policy transactions.

- Maela Adao, (215) 320-4401 or madao@dcrb.com for electronic reporting and use of the WCPOLS reporting standards.

- Central Support, (215) 320-4933 or centralsupport@dcrb.com on the use of PDM.

William V. Taylor
President