Application Manager

User Guide

Delaware Compensation Rating Bureau, Inc.

Pennsylvania Compensation Rating Bureau

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A. INTRODUCTION

The Application Manager is the common interface for accessing products hosted in the secure section of the DCRB/PCRB website.

This guide offers an overview of the features available within the Application Manager and provides useful tips for navigating the website. It is recommended that you review this document before using the website.

B. PRIVACY AND SECURITY

The DCRB/PCRB Privacy and Security Statement can be viewed directly from the website. A link to the statement is available on the Sign In screen of the Application Manager.

C. GETTING STARTED

Accessing the Website

The recommended web browser for accessing the Application Manager is Google Chrome. Some features may not function properly when using alternative browsers.

To access the Application Manager, visit:
- Pennsylvania: https://www.pcrbdata.com/AppMgr/Default.aspx
- Delaware: https://www.pcrbdata.com/AppMgr/Default.aspx?StateCode=DE
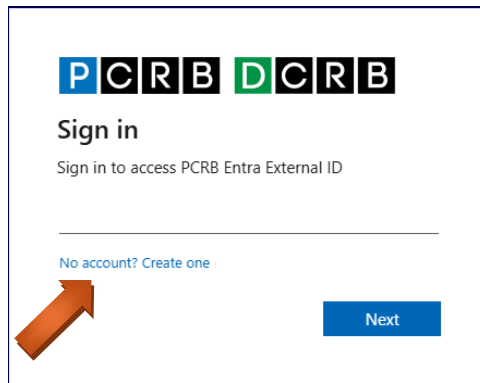
Alternatively, you can click on the Application Login button located on the DCRB/PCRB website: www.pcrb.com or www.dcrb.com.

Existing Users – Signing In

1. On the sign in screen, read the user agreement paragraph, and then click the **Sign in with email** button to proceed. By doing so, you acknowledge and accept the DCRB/PCRB Privacy and Security Statement, as well as the Terms of Service and Conditions of Use for using the website's facilities.
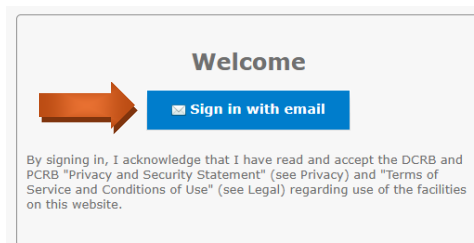
2. If this is your first time accessing the website ,select the **No Account? Create One** link.

3. Enter your email address. Click **Next**. After submitting your email address, a verification code will be sent to that email. The verification code is a one-time code that expires after 30 minutes.

4. Check your inbox for the code, then enter it on the website. Click **Sign In** to access your account.
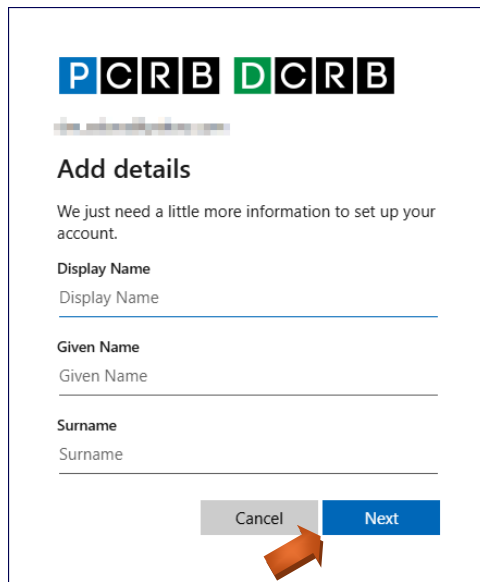
5. If this is your first time accessing the website, you will be prompted to complete this step. Enter your information. In the **Given Name** field, enter your first name, and in the **Surname** field, enter your last name. For the **Display Name**, enter your first and last name. Click **Next**.
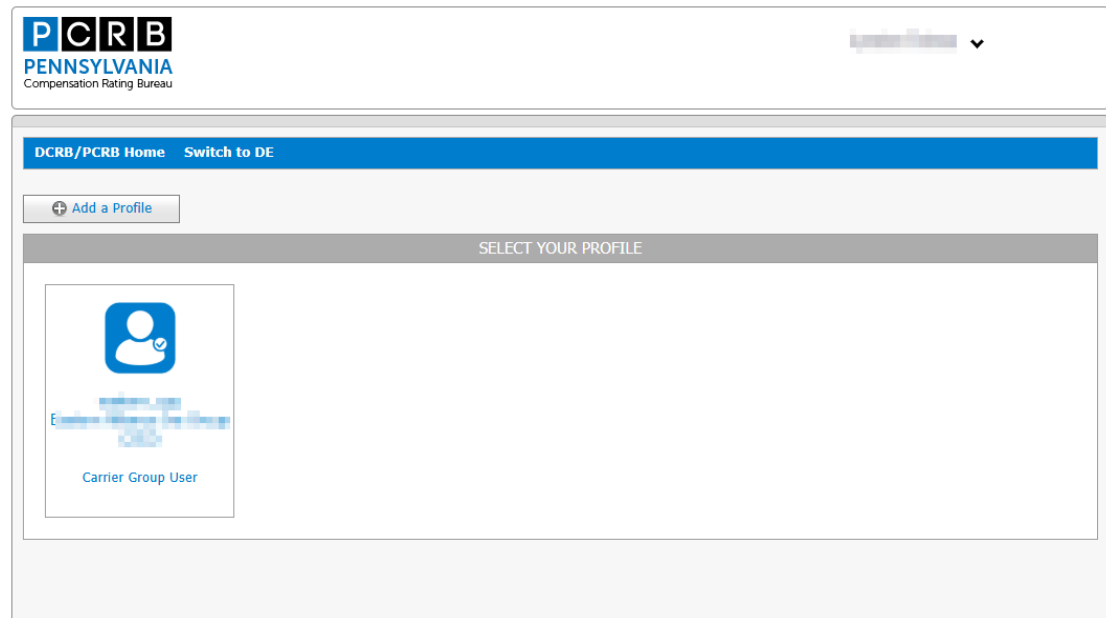
6. You will be redirected to the **SELECT YOUR PROFILE** screen where you can select your user profile.

New Users – Creating a New Account and a User Profile

First time website users must create an account and a user profile before they can access the products within the Application Manager. A single registration will allow access to both Pennsylvania and Delaware data.

1. On the sign in screen, read the user agreement paragraph, and then click the **Sign in with email** button to proceed. By doing so, you acknowledge and accept the DCRB/PCRB Privacy and Security Statement, as well as the Terms of Service and Conditions of Use for using the website's facilities.
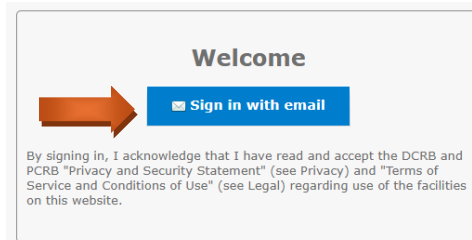
2. Select the **No Account? Create One** link.
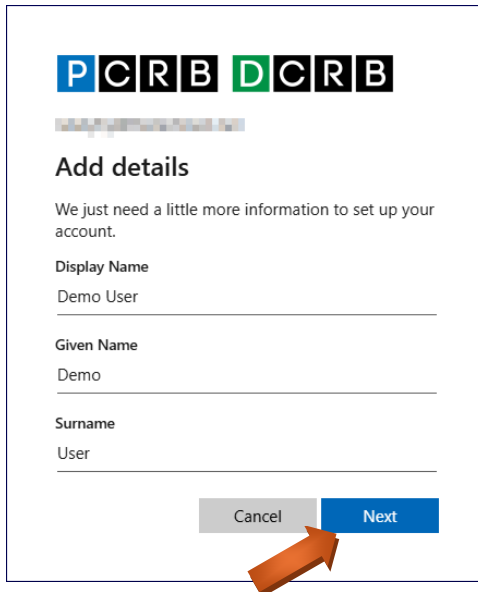
3. Enter your email address. Click **Next**. After submitting your email address, a verification code will be sent to that email. The verification code is a one-time code that expires after 30 minutes.
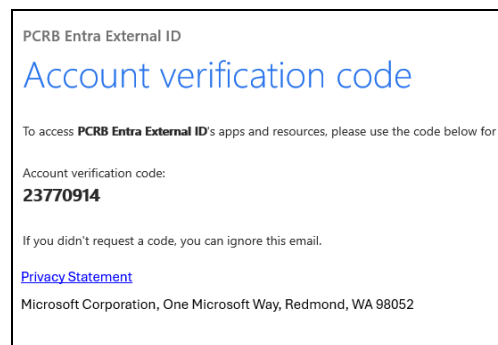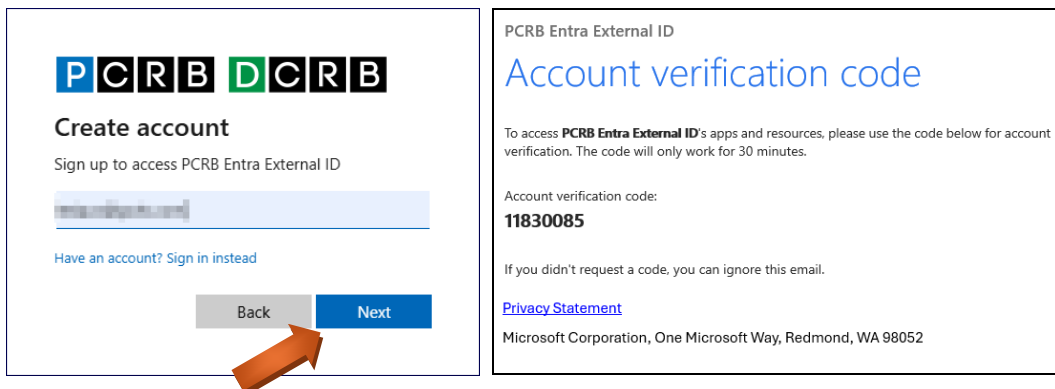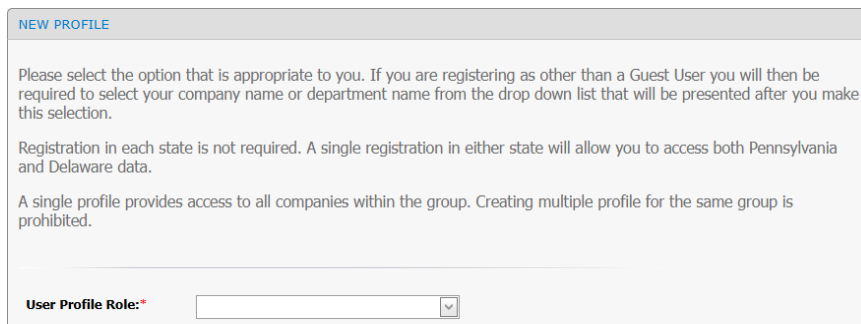
4. Enter the code you received in your email and click **Next**.

5. After verifying your email, you will be prompted to enter a **Display Name**, your **Given Name** (First Name) and **Surname** (Last Name) to set up your account. For the Display Name, enter your full name: First Name and Last Name. Click **Next**.

6. You will be redirected to a screen to create a new user profile. Select the **User Profile Role** option that best describes your role.

- **Agent User** – This is for insurance agents and brokers. Agent Users require approval from their Agency Group Administrator. Individuals applying for the role of Agency Group Administrator (AGA) must be appointed by the agency's authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the AGA.

- **Carrier Group User** – This is for individuals associated with a DCRB/PCRB member carrier. It requires approval from the Carrier Group Administrator. After selecting this role, you will be required to choose your company name from a drop-down list.

- **Coal Bureau User**

- **Employer User** – This is for business owners. Employer Users require approval from their Employer Group Administrator. Individuals applying for the role of Employer Group Administrator (EGA) must be appointed by the company's authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the EGA.

- **Guest User** – This is for individuals who are not associated with a carrier group, employers, insurance agents, or brokers. It does not require approval from an administrator.

- **Insurance Department User** – This is for individuals employed by the Pennsylvania or Delaware State Insurance Department. It requires approval from the Insurance Department Administrator.

- **TPA (Third Party Administrator)** – This is for an entity or individual that processes insurance transactions for a carrier. A valid TPA ID is required to register. It requires approval from the Carrier Group Administrator.

7. Complete the **ABOUT YOU** section with the necessary information. For the **Profile Name**, enter a display name to identify the user profile. Profile names are customizable.

8. Once you've filled out all the required information, click the **Register Now** button to complete your registration.

Switching Between States

Registering for a user profile in either Pennsylvania or Delaware will allow you to access data for both states. To switch between Pennsylvania (PA) and Delaware (DE), select the "**Switch to PA**" or "**Switch to DE**" links located on the sign-in screen or the "Select Your Profile" screens.
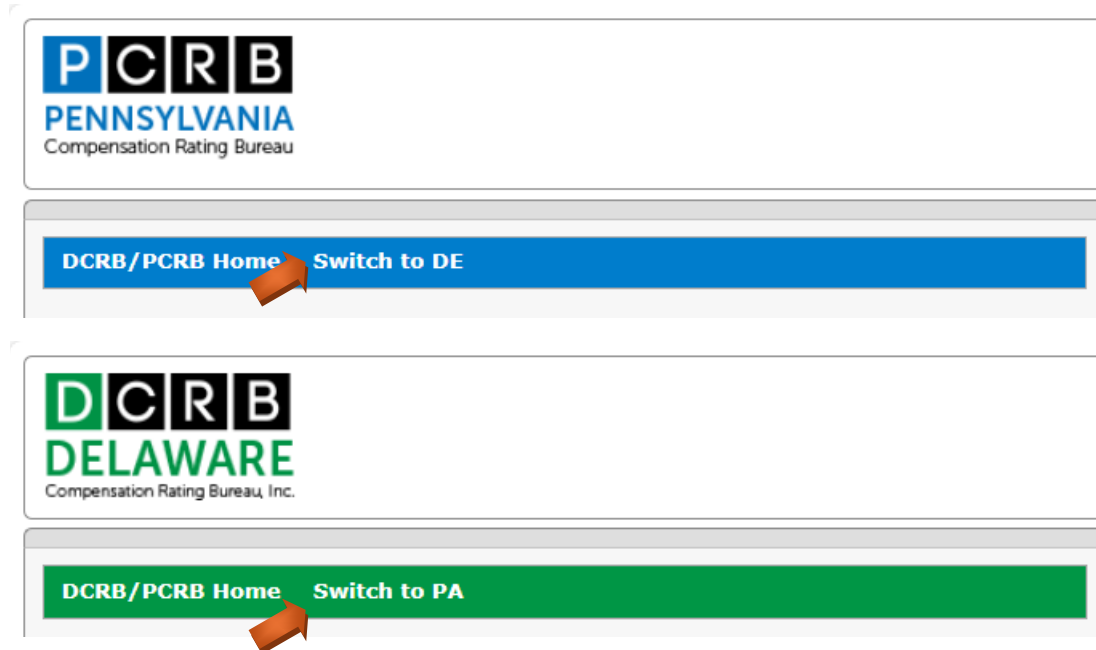
Account Verification and Lockout Policy

- The verification code is automatically generated and sent to the email address associated with the account.

- The verification code is a one-time code valid for 30 minutes from the time of issuance. After this period, the code expires, and you will need to request a new code to proceed.

- You are allowed a maximum of 3 unsuccessful attempts before the account is temporarily locked.

- After the 3rd failed attempt, you will be temporarily locked out from further code entry for 60 seconds.

- If you subsequently enter the incorrect code after the initial 3 failed attempts, the lockout duration will increase.

- Once the lockout period has passed, you may attempt to enter the correct passcode again.

Signing Out of the Website

1. In the upper right-hand corner of the screen, hover your mouse pointer over your name. A drop-down menu will appear with the **Sign Out** option.
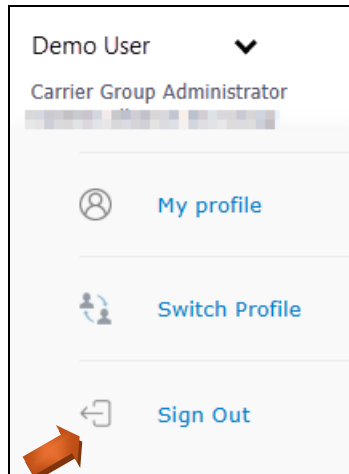
Some products within the Application Manager have the **Sign Out** link located in the upper right-hand corner of the screen without a drop-down menu.
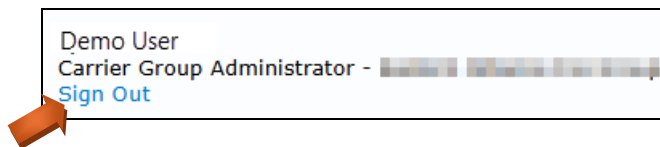
2. Select **Sign Out**. You will be redirected to a screen where you are asked to select the account you wish to sign out from.
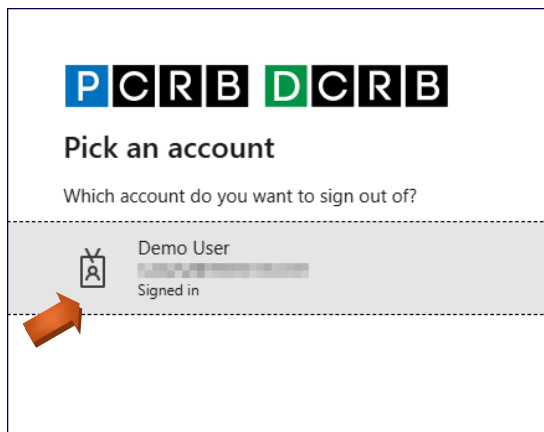
3. After selecting the account, you will be redirected to the Application Manager's sign-in screen, completing the sign-out process.

E. USER PROFILES

The **SELECT YOUR PROFILE** screen allows you to easily choose and manage your profiles. You can have a single profile or multiple profiles, depending on your role and the organization you work for. You can also create new profiles as needed.

Upon successfully logging into the Application Manager, you will be directed to a screen displaying your available user profiles as **tiles**. Each tile will display the profile role, the associated company or organization, and the profile status.

User Profile Status

Definitions:

- **Active**: The user profile is authorized to access the system.

- **Inactive**: The user profile has been deactivated due to inactivity. Profiles that have remained inactive (with no sign-ins) for the past three years will be automatically deactivated to maintain system security and efficiency. If a profile is deactivated, it can be reactivated by contacting Central Support.

- **Awaiting Approval**: The user profile is pending approval by the group administrator. It has not yet been fully approved and is awaiting review or confirmation.

- **Suspended**: The user profile has been suspended due to security reasons or for other administrative reasons. The suspension may be temporary or permanent, depending on the issue.

Selecting a User Profile

1. To select a profile, click on the corresponding tile.
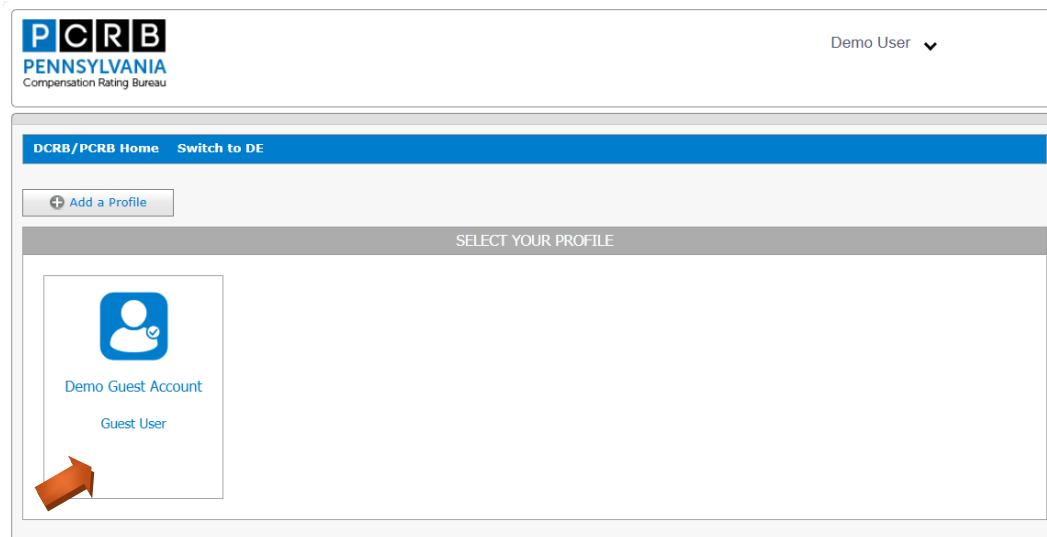
2. After selecting the profile, you will be redirected to the home screen which displays all the products that the profile is authorized to access.

Creating a New User Profile

1. If you need to create a new profile, select the **Add a New Profile** button.

   - A single profile provides access to all companies within the group, so you will only need one profile to access everything related to that group.

   - Creating multiple profiles for the same group is not allowed. You should only create additional profiles if needed for different roles or groups.

2. You will be redirected to a screen to create a new user profile. Select the **User Profile Role** option that best describes your role.

- **Agent User** – This is for insurance agents and brokers. Agent Users require approval from their Agency Group Administrator. Individuals applying for the role of Agency Group Administrator (AGA) must be appointed by the agency's authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the AGA.

- **Carrier Group User** – This is for individuals associated with a DCRB/PCRB member carrier. It requires approval from the Carrier Group Administrator. After selecting this role, you will be required to choose your company name from a drop-down list.

- **Coal Bureau User**

- **Employer User** – This is for business owners. Employer Users require approval from their Employer Group Administrator. Individuals applying for the role of Employer Group Administrator (EGA) must be appointed by the company's authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the EGA.

- **Guest User** – This is for individuals who are not associated with a carrier group, employers, insurance agents, or brokers. It does not require approval from an administrator.

- **Insurance Department User** – This is for individuals employed by the Pennsylvania or Delaware State Insurance Department. It requires approval from the Insurance Department Administrator.

- **TPA (Third Party Administrator)** – This is for an entity or individual that processes insurance transactions for a carrier. A valid TPA ID is required to register. It requires approval from the Carrier Group Administrator.

3. Complete the **ABOUT YOU** section with the necessary information. For the **Profile Name**, enter a display name to identify the user profile. Profile names are customizable.

4. Once you've filled out all the required information, click the **Register Now** button to complete your registration. The new user profile can now be selected from the **SELECT YOUR PROFILE** screen.

Switching Between User Profiles

If you want to switch to a different profile after you've selected one, follow these steps:

1. On the upper right-hand corner of the screen, hover your mouse pointer over your name.

2. From the dropdown menu, click the **Switch Profile** option.
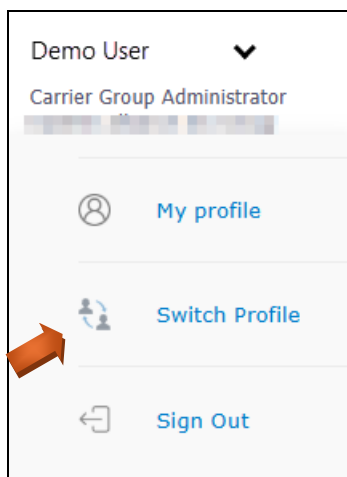
3. You will then be redirected back to the **SELECT YOUR PROFILE** screen, where you can choose another profile.

Viewing User Profile Information

If you want to view the profile information after selecting one, follow these steps:

1. On the upper right-hand corner of the screen, hover your mouse pointer over your name.

2. From the dropdown menu, click the **My Profile** option.
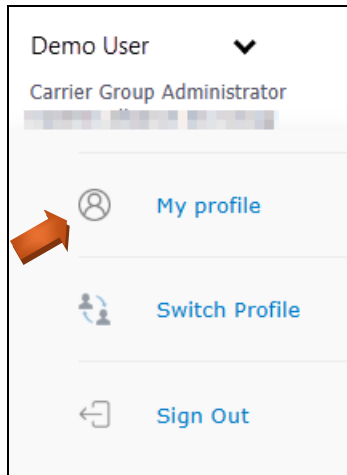
3. Update profile information as necessary and click **Save** to confirm the changes.

   - **Profile Name** – This is the display name to identify the user profile. Profile Names are customizable.
   - **Title**
   - **Phone Number + Ext**
   - **Company Name**
   - **Company Address**
   - **Company City**
   - **Company State**
   - **Company Zip Code**
   - **Primary Carrier** (Only for Carrier Group Users)
   - **Receive Email** (Only for Administrators) – Check this box to receive admin notifications

G. MENU OPTIONS

1. Home

The **Home** screen is displayed upon selecting your user profile. It provides an overview of the products available to you within the Application Manager. Additionally, alerts such as new messages and approval requests (for Administrators only) are shown.

- To launch a product, click on the product name.

2. Message Board

Select **Message Board** from the main menu to view important website announcements, such as service interruptions, application updates, and new features.

- To view details, click the **[+]** next to the announcement.

3. Help Section

Select **Help Section** from the main menu to access user guides and instructions for various products.

- To view the guides, you must have Adobe Acrobat Reader installed on your device.

- To open a guide, click the PDF icon next to the document.

4. Request Status Change *(Guest Users Only)*

Select **Request Status Change** from the main menu to submit a request to change your user profile role. Status change requires approval from the group administrator. If a request is submitted, your access to the website will be temporarily unavailable until the request is approved by the administrator.

5. Request Access *(Carrier Group Users Only)*

Request for Access to Applications

Select **Request Access – To Application(s)** from the main menu to submit a request to the group administrator for access to use a product.

On the Application Access Requests screen, check the box of the product(s) for which you need access to and then click the **Request** button.

Request?	Application Name	Description	Date Requested
✔	Invoice Online	View Invoices	
✔	Medical Data Manager	View, Enter and Edit Medical Information	
✔	Policy Data Manager	View, Enter and Edit Policy Information	
☐	Test Audit Online	Test Audit Statistics - Download	
☐	Unit Data Manager	View, Enter and Edit Unit Stat Information	
☐	WC Data Pro	View, compare and export premium and loss data	
	Count: 8		

APPLICATION ACCESS REQUESTS

Request

Request for Access to Carriers

Select **Request Access – To Carriers (s)** from the main menu to submit a request to the group administrator for access to carrier data.

On the Carrier Access Requests screen, check the box of the carrier(s) for which you need access to and then click the **Request** button.

CARRIER ACCESS REQUESTS

Request?	Carrier Name	NCCI Number	NAIC Number	Bureau Number	Date Requested
✔	Carrier Test Data	15066	88888	888	
	Count: 1				

Request

6. Carrier List *(Carrier Group Users Only)*

Select **Carrier List** from the main menu to view the full list of carriers that are part of the Carrier Group.

7. **Carrier Group Admin** *(Carrier Group Administrator Only)*

The Carrier Group Administrator functions are performed via the **Carrier Group Admin** menu. Select an option from the drop-down menu to manage users, manage permissions, set up notifications and web services.

H. CARRIER GROUP ADMINISTRATORS

A key element of the Application Manager is the establishment of Carrier Group Administrators (CGA). The primary role of a Carrier Group Administrator is to manage the users of their carrier group. The CGA will be responsible for maintaining all user access privileges to the site and to the products and carrier data. It is the responsibility of the CGA to manage their user community. The DCRB/PCRB will communicate any and all system informational items to the CGA.

Each carrier group may have multiple Administrators assigned to the group. All Administrators will have access to all products available to the carrier group and to all carrier data.

If an additional or replacement CGA is needed, contact Central Support for information on how to make those changes.

1. CGA Application Procedure

The instructions on how to set up a CGA can be found on the PCRB website, www.pcrb.com. Please refer to Circular # 1472.

2. CGA Responsibilities

a. Manage User Profile Requests

When an individual registers (or a Guest User submits a status change) to become a Carrier Group User for the carrier group, the CGA will be notified via email of the pending request.

Below is an example of the email:
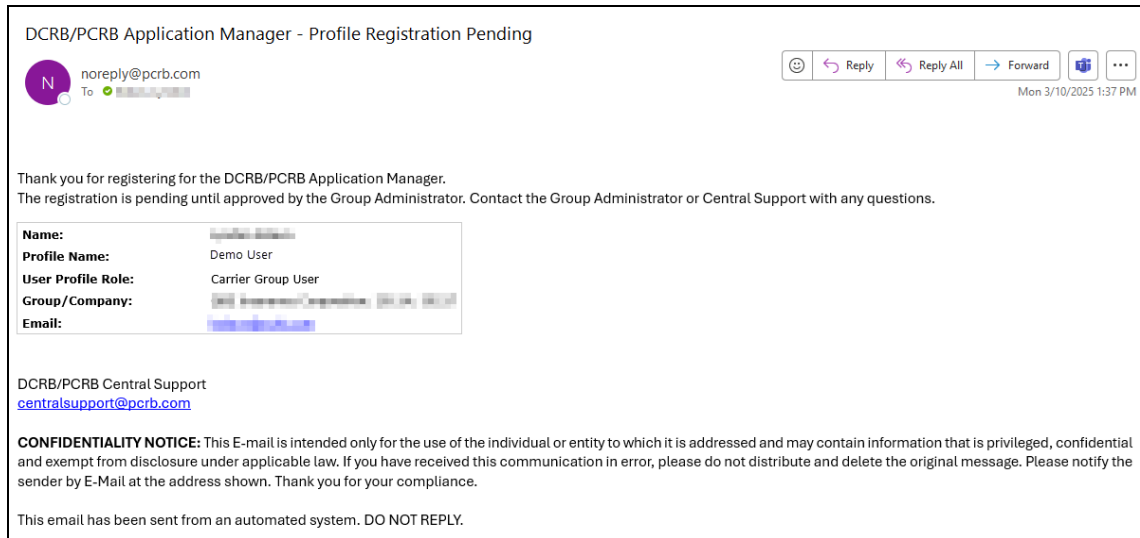
To approve or reject user requests:

1) Select **Carrier Group Admin** from the main menu and then select **Maintain Users** from the drop-down menu. Alternatively, the CGA may select the Carrier Group User requests link from the Home screen.
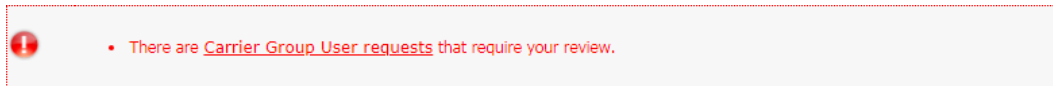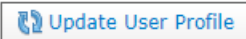
2) On the Maintain Users screen, check the box for "Show pending Carrier Group User requests".
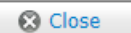
3) Select the icon to view the user's profile.

4) On the User Profile screen, click the **Approve** button to approve the user or click the **Reject** button to reject the user.

5) Click the **OK** button on the confirmation dialog box displayed.

6) Click the **Close** button on the User Profile screen to return to the Maintain Users screen.

b. Manage Application Access

When a Carrier Group User submits a request for access to products, the CGA will be notified via email of the pending request. Below is an example of the email:

From: noreply@pcrb.com
Subject: New Application(s) Request

Dear Administrator,

A user is requesting access to the following application(s):

- *Policy Data Manager*
- *Unit Data Manager*

User information:
Name: Demo User
Email: demoemail@email.com
Phone: (123) 456-7890

Login to the DCRB/PCRB Application Login to assign the requested applications to the user.

Thank you,
Central Support
(215) 320-4933
centralsupport@pcrb.com

To approve the application access request:

1) Select the application access requests link from the Home screen.

> ⊗ • There are application access requests that require your review.

2) On the Carrier Access Requests screen, click **[+]** next to the requestor's last name to view the details of the request.

Application Access Requests					
Last Name	**First Name**	**User Type**	**Company Name**	**Email**	**Phone**
⊞ User	Demo	Carrier Group User	PCRB	demoemail@email.com	(123) 456-7890
		Count: 1			

3) Select the applications that the CGU will be given access to and then click the **Approve** button or select the applications that the CGU will not be given access to and then click the **Reject** button.

Select	Application Name	Date Requested
☑	Policy Data Manager	03/26/2019 @ 04:03 PM EST
☐	Unit Data Manager	03/26/2019 @ 04:03 PM EST
	Count: 2	

☑ Approve   🚫 Reject

4) Click the **OK** button on the confirmation dialog box displayed.

To modify CGU application access:

1) Select **Carrier Group Admin** from the main menu and then select **Maintain Users** from the drop-down menu.

2) On the Maintain Users screen, select the 🖉 icon to view the user's profile.

3) On the User Profile screen, select **Assign Application(s).**

User Profile	
User Name: *	Demo
Password:	User
First Name: *	▓▓▓▓▓▓
Last Name: *	Demo User
Title: *	Staff
Phone Number: *	(123) 456-7890
Fax Number:	
Email: *	PCRB
Company Name: *	1 Example Rd
Company Address: *	Philadelphia
Company City: *	PENNSYLVANIA
Company State: *	19103
Company Zip Code: *	Carrier Test Data
Primary Carrier: *	Approval Requested
Status:	Carrier Group User
User Type:	Carrier Test

Update User Profile

Assign Carrier(s)

Assign Application(s)

Close

4) Check the **Authorize to Use** product box to grant the CGU access to the product or uncheck the box to remove their access. Changes made are saved automatically.

Some products can be assigned the "View Only" access which allows the user to access the product in "read only" mode where the data cannot be altered or modified.

The checkbox will be grayed out for products that are assigned to all users by default. The access cannot be modified.

Assign Application(s)

Application Name	Description	Authorized to Use	View Only
Carrier Pricing Benchmark	Pricing Benchmark Information	☑	☐
Experience Modification Calculator	Calculate Experience Modification	☑	☐
Invoice Online	View Invoices	☐	☐
Medical Data Manager	View, Enter and Edit Medical Information	☐	☐
Policy Data Manager	View, Enter and Edit Policy Information	☑	☐
Rating and Underwriting Reference	Experience Modifications, Merit Ratings, Rating Values, Underwriting Guide	☑	☐
Test Audit Online	Test Audit Statistics - Download	☐	☐
Unit Data Manager	View, Enter and Edit Unit Stat Information	☑	☐
View Authorized Class	Authorized Class	☑	☐
WC Data Pro	View, compare and export premium and loss data	☐	☐

5) Click the **OK** button on the confirmation dialog box displayed.

6) Click the **Close** button on the User Profile screen to return to the Maintain Users screen.

c. Manage Carrier Access

When a Carrier Group User requests for access to carrier data, the CGA will be notified via email of the pending request. Below is an example of the email:

From: noreply@pcrb.com
Subject: New carrier(s) Request

Dear Administrator,

A user is requesting access to the following carrier(s):

  • Carrier Test Data

User information:
Name: Demo User
Email: demoemail@email.com
Phone: (123) 456-7890

Login to the DCRB/PCRB Application Login to assign the requested carriers to the user.

Thank you,
Central Support
(215) 320-4933
centralsupport@pcrb.com

To approve carrier access requests:

a) Select the underline carrier access requests link from the Home screen.

> ⚠️ • There are carrier access requests that require your review.

b) On the Carrier Access Requests screen, click [+] next to the requestor's last name to view the details of the request.

CARRIER ACCESS REQUESTS					
Last Name	**First Name**	**User Type**	**Company Name**	**Email**	**Phone**
⊞ User	Demo	Carrier Group User	PCRB	demoemail@email.com	(123) 456-7890
		Count: 1			

c) Select the carriers that the CGU will be given access to and then click the **Approve** button or select the carrier that the CGU will not be given access to and then click the **Reject** button.

Select	Carrier Name	NCCI Number	NAIC Number	Bureau Number	Date Requested
✔	Carrier Test Data	15066	88888	888	03/22/2019 @ 03:19 PM EST
	Count: 1				

☑ Approve   🚫 Reject

d) Click the **OK** button on the confirmation dialog box displayed.

To modify CGU carrier access:

a) Select **Carrier Group Admin** from the main menu and then select **Maintain Users** from the drop-down menu.

b) On the Maintain Users screen, select the 🖉 icon to view the user's profile.

c) On the User Profile screen, select **Assign Carrier(s)**.

User Profile   ⤊

User Name: *	Demo
Password:	User
First Name: *	▓▓▓▓▓▓▓
Last Name: *	Demo User
Title: *	Staff
Phone Number: *	(123) 456-7890
Fax Number:	
Email: *	PCRB
Company Name: *	1 Example Rd
Company Address: *	Philadelphia
Company City: *	PENNSYLVANIA ⌄
Company State: *	19103
Company Zip Code: *	Carrier Test Data ⌄
Primary Carrier: *	Approval Requested
Status:	Carrier Group User ⌄
User Type:	Carrier Test

🔁 Update User Profile

Assign Carrier(s) ⬅   ⤋

Assign Application(s)   ⤋

❌ Close

d) Check the **Authorized to Use** carrier box to grant the CGU access to the carrier data or uncheck the box to remove their access. Changes made are saved automatically.

Carrier Name	NCCI Number	Bureau Number	Authorized to Use
Carrier Test Data	15066	888	☑
Record(s): 1			

e) Click the **OK** button on the confirmation dialog box displayed.

f)   Click the **Close** button on the User Profile screen to return to the Maintain Users screen.

d. Remove User Profiles

It is the responsibility of the CGA to remove users and/or administrators when necessary. This could occur when someone has left the company or assumed other responsibilities. Failure to do this means that the unauthorized personnel could access the data.

Note: Removing a user profile does not delete the account, but it removes all access to the carrier(s) data.

To remove a CGU from the carrier group:

a)   Select **Carrier Group Admin** from the main menu and then select **Maintain Users** from the drop-down menu.

b)   On the Maintain Users screen, select the ⬛ icon of the user that will be removed from the carrier group.

c)   Click the **OK** button on the confirmation dialog box displayed.

a)   The CGU will receive an email indicating that their password was reset. Within the email is the temporary password to sign in to the website.

f. Notification Setup

WC Rating Notification Setup – automated email notification that the mentioned policies has a new applicable experience modification or merit rating that has been published to the CDX website.

To setup the carrier group to receive notifications when new ratings are issued by the DCRB/PCRB:

a)   Select **Carrier Group Admin** from the main menu and then select **Notification Setup** from the drop-down menu.

b)   Click the ⬛ icon for **WC Rating Notification Setup**.

c)   Select the **Yes** radio button to enable the notification.

d)   Enter up to five email addresses where the notifications are to be sent.

e)   Choose the type of file to receive. Select the **CSV** radio button to receive a comma delimited file for import into a spreadsheet application, or select the **TEXT** radio button to receive a text file in WCNOTIFY format.

f)   Click the **Update** button.

The following fields are contained within the CSV file:

Note: CSV file contains a comma separating fields.

Field No.	Field Title/Description	Class	Position	Bytes
1	CARRIER CODE	Numeric	1-5	5
2	POLICY NUMBER IDENTIFIER	AlphaNumeric	6-23	18
3	INDEPENDENT DCO RISK ID NUMBER/RISK ID/ACCOUNT NUMBER	Numeric	24-32	9
4	STATE CODE	Numeric	33-34	2
5	POLICY EFFECTIVE DATE	Numeric (YYYYMMDD)	35-42	8
6	PRODUCT DATA TYPE CODE	Alpha	43	1
7	PROCESSED DATE	Numeric (YYYYMMDD)	44-51	8
8	RATING TYPE CODE	AlphaNumeric	52	1
9	RATING EFFECTIVE DATE	Numeric (YYYYMMDD)	53-60	8
10	RATING EXPIRATION DATE	Numeric (YYYYMMDD)	61-68	8
11	RATING FACTOR	Numeric (X.XXX ASSUMED DECIMAL)	69-73	5
12	ARAP FACTOR	Numeric (NOT USED BY DCRB/PCRB)	74-76	3
13	UNIT-CERT NUMBER IDENTIFIER	AlphaNumeric (NOT USED BY DCRB/PCRB)	77	1
14	INSURED NAME	AlphaNumeric	78-177	100

Invoice Online Notification Setup

To setup the carrier group to receive notifications when new statements or invoices are issued by the DCRB/PCRB:

a) Select **Carrier Group Admin** from the main menu and then select **Notification Setup** from the drop-down menu.

b) Click the 🛠 icon for **Invoice Online Notification Setup**.

c) Select the **Yes** radio button to enable the notification.

d) Enter up to five email addresses where the notifications are to be sent.

e) Click the **Update** button.

g. Web Service Setup

Refer to the *WCUnderwriting Web Service Electronic Guidelines* located within the Help Section of the website for more information.

To establish a login credential for the web services and to authorize its use, select **Carrier Group Admin** from the main menu and then select **Web Service Setup** from the drop-down menu.

The CGA will be prompted to enter a user ID and password to be used by the web service. Once entered, the CGA must activate the **Authorized to Use** box, and then click the **Update** button.

I. SUPPORT

Questions regarding the Application Manager should be directed to DCRB/PCRB Central Support.

- Phone: 215-320-4933

- Email: centralsupport@pcrb.com or centralsupport@dcrb.com

An initial response to inquiries will be provided by a team member within 48 to 72 hours from the date of receipt.