

NORTH CAROLINA
Rate Bureau

Carrier Data Quality Performance Report User Guide

Version 1.3

**If at any time during these procedures you need assistance,
you may contact the North Carolina Rate Bureau at:**

**Phone: 919-582-1056
E-mail: support@ncrb.org**

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Before You Start...

Welcome to the Carrier Data Quality Performance Report widget! The Carrier Data Quality Report widget grants the carriers access to view the data reporting compliance and timeliness grades for a given reporting year for 2021. Starting 2022, this Carrier Data Quality Performance Report widget will be available on a quarterly basis.

The reports available to view under the widget will display the grades for Policy, Compliance/Noncompliance, and USR data.

By taking some time to review the first few pages of this user guide, this will prepare any user to quickly learn how to use this powerful online tool. Carrier Data Quality Performance Report was designed to be user-friendly and easy-to-use, but if problems occur, reference this guide for help.

Now let's get started!

Web Browser Specifications

Carrier Data Quality Report User Guide has been tested and certified working for the Chrome browser. Other browsers such as IE11, Firefox, Opera, Netscape and MS EDGE are not supported at this time.



You can download the latest version of Chrome free of charge at <https://www.google.com/chrome/>

Accessing Carrier Data Quality Report

Access the Carrier Data Quality Report from the Secured Members Area of the NCRB, NCRF and NCIGA Web site. This section describes how to get to the Log On page, enter credentials, and access the Carrier Data Quality Performance Report application.

Logging into the Secured Members Area

The Secured Members Area, also known as the Member Services Portal, will provide access to all of the secured applications and data on the NCRB, NCRF and NCIGA Web site. To log in to the Secured Members Area, use the following procedure. (Use the valid user name and password that were provided.)

1. On the NCRB Website (<http://www.ncrb.org>), click the NCRB link. Under the Member Services area, click the Member Services Portal - Login link. The Secured Members Area Logon page displays.

The screenshot shows the NCRB, NCRF, and NCIGA Logon page. The page has a blue header with the NCRB, NCRF, and NCIGA logos. Below the header, there is a date of 11/13/2012 and a vertical label 'APPLICATION PORTAL'. The main content area is titled 'Logon' and includes the following text: 'Web Applications can only be accessed by authorized personnel. Access requires a secure logon before any reports or functions can be accessed. Users of the system must first be authorized.' Below this, there are two sections: 'Need a Logon Account?' with a link to 'New Account Instructions' and 'Already have a Logon Account?' with a 'Logon' button. Below these sections, there is a section for 'Enter Logon Information' with input fields for 'Logon ID*' and 'Password*', and a 'Logon' button. At the bottom, there is a section for 'Forgot Your Password?' with a link to request a new password. The footer contains contact information for the North Carolina Rate Bureau, North Carolina Reinsurance Facility, and North Carolina Guaranty Association, along with a copyright notice and links to 'Privacy Statement' and 'Terms of Use'.

Logon

2. Enter the Logon ID and password. Click the Logon button. The Secured Members Area page displays.

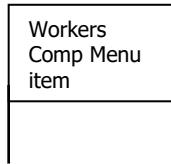
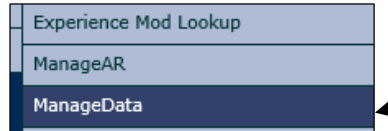
Note: If the incorrect user name or password was entered, the system will return an error message to inform you of the invalid data. Re-enter the user name and password correctly, and click the Logon button to enter the system.

Launching the ManageData Application

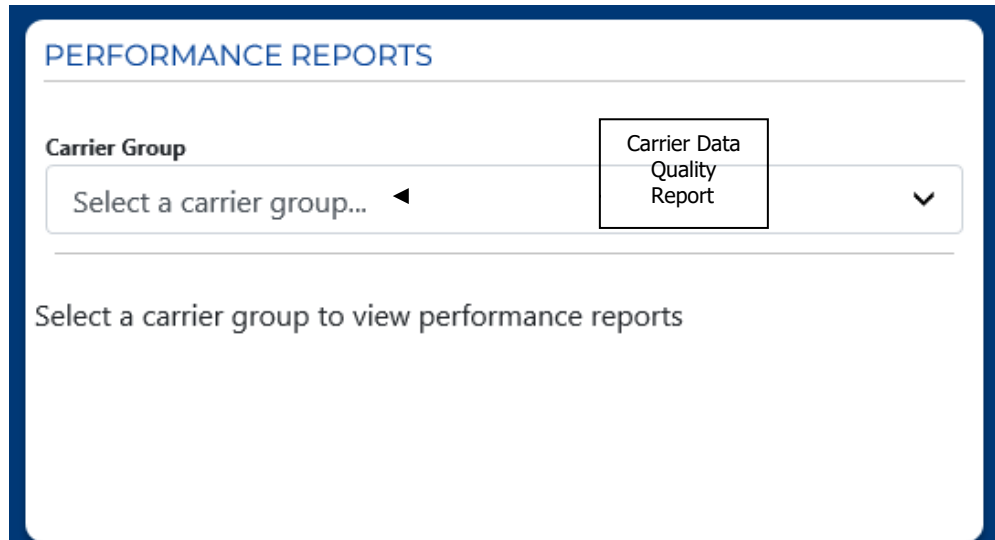
The Carrier Data Quality Report is located under the Workers Comp menu and then the Carrier Data Quality Report sub-menu.

The Secured Members Area is the common place from which all secured applications are accessed on the NCRB, NCRF and NCIGA Web site. Only applications you have been authorized to access are listed. All of the applications are categorized based upon the business unit that the application represents. To launch an application, follow these procedures:

1. On the left navigation menu, click Workers Comp.



2. On the sub-menu, click Carrier Data Quality Report. The application page displays.

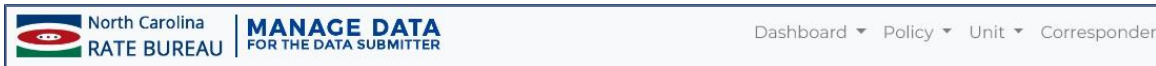


Navigating the Carrier Data Quality Report

The Carrier Data Quality Performance Report was designed with an intuitive user interface that makes it easy to access and view your data reporting quality and timeliness for a given reporting year.

Menu Navigation

When the Carrier Data Quality Performance Report application is displayed, you will have access to carriers that are associated with your web security logon account. If you do not see a carrier code that you think should appear, contact your company's NCRB Group Administrator to verify that your logon account was created properly. Additionally, your access to any of the reports for a given carrier is based upon privileges established by your NCRB Group Administrator.



The Carrier Data Quality Performance Report features a widget bar that is displayed at the bottom of the dashboard window. The reports drop down bar is visible regardless of which page is currently displayed.

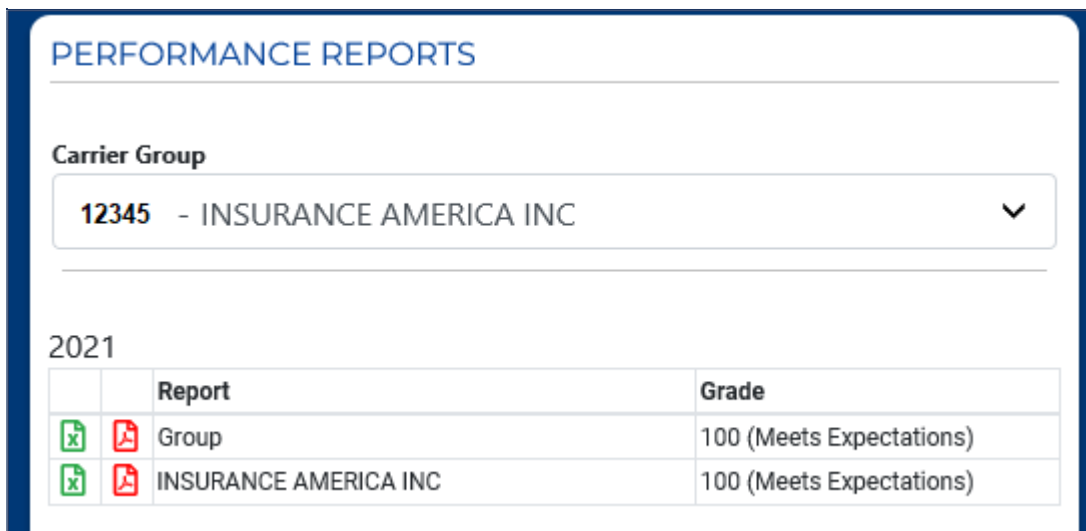


Report Criteria





The Carrier Data Quality Performance Report allows the user to produce different reports based on the carrier, quarter and type of data.

Step 1:

To generate a report, select one or more of the carrier codes or check the “Select All Carriers” textbox for all carriers displayed on the page.



The screenshot shows a 'PERFORMANCE REPORTS' widget. At the top, there is a 'Carrier Group' dropdown menu with the selected value '12345 - INSURANCE AMERICA INC'. Below this, the year '2021' is displayed. A table follows with two columns: 'Report' and 'Grade'. The table contains two rows: one for 'Group' and one for 'INSURANCE AMERICA INC', both with a grade of '100 (Meets Expectations)'. Each row has a green Excel icon and a red PDF icon to its left.

	Report	Grade
 	Group	100 (Meets Expectations)
 	INSURANCE AMERICA INC	100 (Meets Expectations)

Step 2:

Select the data year-The two prior years data are available within the CDQPR widget

Step 3:

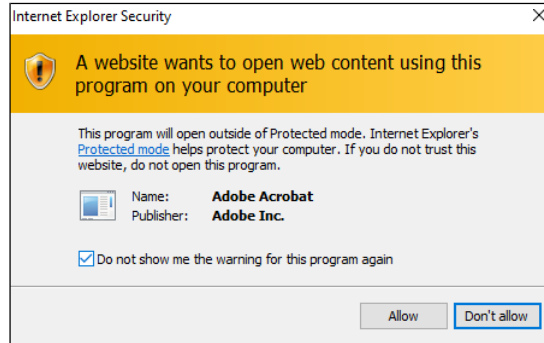
Select the PDF icon to see the group summary or select the PDF icon to see each individual carrier performance

Step 4:

Select the MS Excel icon to see the detailed performance reports for all subject areas at the group level or at the individual carrier level.

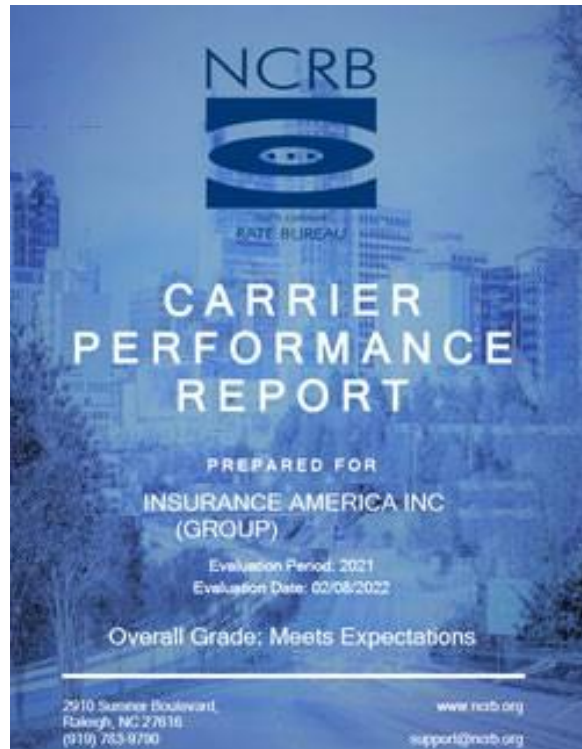
Report Options

The report will be generated once the carrier group drop down is selected. The Carrier Data Quality Report will open in a separate window. Within the report window, the user will have the option to save the report in a number of ways.



Carrier Performance Report

The user can generate a report for one carrier, multiple carriers or all carriers. The user will need to select the data year and the report will generate as a pdf.



Voluntary Policy Timeliness & Data Quality

Voluntary Policy Timeliness measures whether a voluntary policy was received and accepted into the Bureau’s data base within 60 days of the policy effective date. A policy received more than 60 days after the policy effective date is outside of the required submission time.

The Voluntary Policy Timeliness Metric Measures:

Total Count—This number is a count of all of the voluntary policies accepted and received by NCRB for the carrier’s selected for the report.

Total On-Time- Received within 60 Days— This number is the # of voluntary policies received within 60 days of the policy effective date divided by the total number of voluntary policies received. The 60 days is based on calendar days.

Score: Number of policies received within 60 days of effective date as a percentage of total policies received.

The Voluntary Policy Data Quality:

Total Count—This number is a count of all of the voluntary policies accepted and received by NCRB for the carrier’s selected for the report.

Total On-Time- Received within 60 Days— This number is the # of voluntary policies received within 60 days of the policy effective date divided by the total number of voluntary policies received. The 60 days is based on calendar days.

Score: Number of policies that incurred a fine as a percentage of total policies received.

Note: Columns containing zero are an indication that NCRB did not receive policies matching the specified data type during the selected data year.



Data Grade:

The Timeliness grade is calculated based upon the percentage of policies received within 60 days of the Policy Effective Date based on the following scale:

Grading Scale:

- Green (Meets Expectations)** or > than 94
- Yellow (Below Expectations)** Between 94 -85
- Yellow (Below Expectations)** Between 94 -85
- Red (Needs Improvement)** < than 85

Assigned Risk Policy Timeliness and Quality

Assigned Risk Policy Timeliness measures whether an assigned risk policy was received and accepted into the Bureau’s data base within 30 days of the policy effective date. A policy received more than 30 days after the policy effective date is not considered timely.

Assigned Risk - Grade Meets Expectations				
TIMELINESS				
		● > 94	● 94 - 85	● < 85
Metric	Weight	Total Count	Total On-Time	Score
Assigned Risk Timeliness - Policy				
Number of AR policies received within 60 days of effective date (or other originating transaction) as a percentage of total AR assignments made.	60%	0	0	100
Assigned Risk Timeliness - Ineligibility				
Number of Ineligibility transactions received no later than 5 days after transaction effective date as a percentage of total Ineligibility transactions received.	20%	0	0	100
Assigned Risk Timeliness - Eligibility				
Number of Eligibility transactions received no later than 5 days after transaction effective date as a percentage of total Eligibility transactions received.	20%	0	0	100

Assigned Risk Timeliness- Policy

Number of AR policies received within 60 days of effective 100 date (or other originating transaction) as a percentage of total AR assignments made.

Assigned Risk Policies – Ineligibility

Number of Ineligibility transactions received no later than 5 days after transaction effective date as a percentage of total Ineligibility transactions received.

Assigned Risk Timeliness – Eligibility

Number of Eligibility transactions received no later than 5 days after transaction effective date as a percentage of total Eligibility transactions received.

Note: Columns containing zero are an indication that NCRB did not receive policies matching the specified data type during the selected data year. Columns containing N/A indicate that the carrier did not report the specified data type to NCRB during the selected data year.

Data Grade:

The Timeliness grade is calculated based upon the percentage of policies received within 30 days of the Policy Effective Date based on the following scale:

Grading Scale:

- Green (Meets Expectations)** or > than 94
- Yellow (Below Expectations)** Between 94 -85
- Yellow (Below Expectations)** Between 94 -85
- Red (Needs Improvement)** < than 85

USR Data

Unit Statistical Data timeliness measures whether expected unit statistical reports were received within a 3 month period after the unit statistical report was due. The timeliness measure for unit statistical data is based on policy month rather than policy effective date. For example, the first report for a May 2012 policy was due in January of 2014. If the unit statistical report was received by January 2014, it is considered on time because the submission reporting requirements have been met. If the unit statistical report was not received by April 2014, it would be considered past due.

When a user selects to run the report for one or more carriers then selects a policy year and chooses USR as the data type; the Unit Statistical Data Timeliness report will be generated. The Unit Statistical Data Timeliness report is broken out into 3 separate columns.

Unit Statistical Data Timeliness and Data Quality

Unit Statistical Data Timeliness and Quality is assessed by the following metrics

USRs received in less than 21 months of policy effective date as a percentage of total USRs reported

USRs accepted prior to the 21st month as a percentage of total USRs submitted

USRs accepted with warning prior to the 2st month as a percentage of total USRs accepted.

Unit Stat - Grade Needs Improvement				
TIMELINESS				
		● > 97	● 90 - 97	● < 90
Metric	Weight	Total Count	Total On-Time	Score
USR Timeliness Number of USR's received in less than 21 months of policy effective date as a percentage of total USR's expected.	60%	728	723	● 99
DATA QUALITY				
Metric	Weight	Total Received	Total Contributing	Score
USR Quality - Rejected Number of USR's accepted prior to the 21st month as a percentage of total USR's submitted.	30%	15	6	● 40
USR Quality - AWW Number of USR's accepted without warning prior to the 21st month as a percentage of total USR's accepted.	10%	0	0	● 100

Note: When a zero is reported in either column this means that 0 transactions were received.

Data Grade

The USR data grade is determined by comparing the percentage of units available to the percentage of units that were past due.

Grading Scale:

Green (Meets Expectations) or > than 94

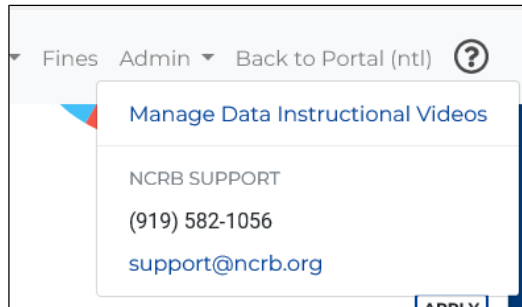
Yellow (Below Expectations) Between 94 -85

Yellow (Below Expectations) Between 94 -85

Red (Needs Improvement) < than 85

Help

Select the “?” in the top, right hand corner of ManageData to access our Instructional videos or to contact NCRB.



Appendix A: Abbreviations and Definitions

Term / Abbreviation	Definition
Bureau	Workers' Compensation state bureau. Also known as DCO.
DCO	Data Collection Organization. Also known as Bureau.
NC or NCRB	North Carolina Rate Bureau
CDQPR	Carrier Data Quality Performance Report
USR	Unit Statistical Report
Unit Statistical Data	USR data that NCRB has received.