

Application Login User Guide

**Delaware Compensation Rating Bureau, Inc.
Pennsylvania Compensation Rating Bureau**

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A. INTRODUCTION

The Application Login is the common interface to access products residing in the secure areas of the DCRB/PCRB website via a single user name and password. Note that the Financial Data Reporting Application (FDRA) and the Delaware Insurance Plan Application (DIP) are not accessible via the Application Login. Refer to the FDRA or DIP User Guide for more information.

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

B. PRIVACY AND SECURITY

Users may view the DCRB/PCRB Privacy and Security Statement within the website. The Sign In screen for the Application Login contains a Privacy link that will provide access to the Privacy and Security Statement.

C. GETTING STARTED

1. Accessing the Website

The website address for the Application Login is: <https://www.pcrbdata.com/ul>. It can also be accessed via the **Application Login** button on the DCRB/PCRB website, www.pcrb.com or www.dcrb.com.

User name and password are required to access the website. Users must read the user agreement paragraph and click the **I Agree** button to proceed. By clicking the button, the user acknowledges and accepts the DCRB/PCRB "Privacy and Security Statement" and "Terms of Service and Conditions of Use" regarding use of the facilities on the website.

2. Registration

New users must register for an account by selecting the **First Time User** option on the Sign In screen. A single registration will allow you to access both Pennsylvania and Delaware data.

On the New Registration screen, select the appropriate user type from the drop-down menu.

Guest User – This is for individuals who are not associated with a carrier group. Employers, brokers and insurance agents typically select this user type. It does not require approval from an administrator.

Carrier Group User (CGU) – This is for individuals who are associated with a DCRB/PCRB member carrier. It requires approval from the Carrier Group Administrator.

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

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

Complete the rest of the form and then click **Next** to view the User Registration Summary screen. Review the summary and then click the **Register** button to submit the registration information.

D. PASSWORDS

1. Password Requirements

- Must be at least 8 characters long and cannot exceed 20 characters
- Must contain at least 1 uppercase character
- Must contain at least 1 lowercase character
- Must contain at least 1 numeric character
- Must contain at least 1 special character from @ # \$ % ^ & + ! =
- Cannot contain user name
- Passwords are case sensitive.

2. Reset Password

Users may reset their password by selecting the **Forgot Password** option on the Sign In screen. The user will be prompted to enter their user name, email address, CAPTCHA code and answer to their security question in order to proceed. The user will receive an email with the temporary password.

While logged in to the website, users may also update their password by selecting the **Change Password** option on the top right corner of the screen.

3. Password Attempts

If a user fails to provide the correct login credentials within 4 attempts, the user will be locked out of the website. If this happens, the user will need to reset their password via the Forget Password option.

4. Password Expiration

Passwords will expire every 90 days and users will be forced to create new passwords based on the password requirements.

E. USER PROFILE

Select the **My Profile** option on the website's top right corner of the screen to view or edit user information.

The following fields can be modified:

- First Name
- Last Name
- Title

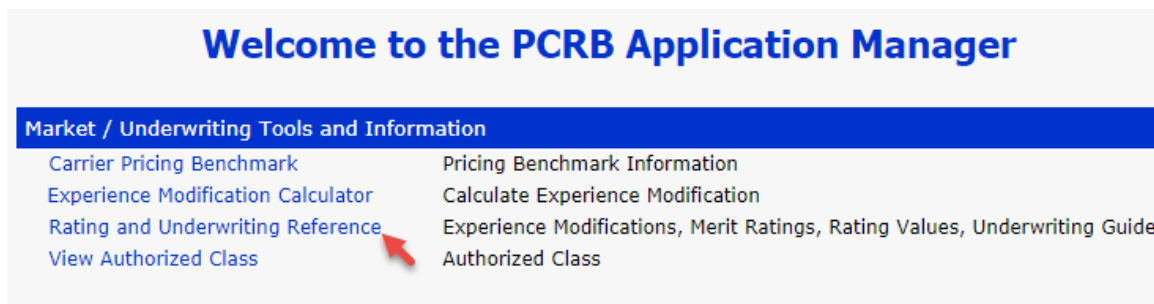
- Phone Number + Ext
- Fax Number
- Email
- Company Name
- Company Address
- Company City
- Company State
- Company Zip Code
- Primary Carrier (Only for Carrier Group Users)
- Security Question
- Security Answer
- Receive Email (Only for Administrators) – Check this box to receive admin notifications

F. MAIN MENU OPTIONS

1. Home

This is the screen presented to the user upon login. The Home screen lists the products that are available to the user within the Application Login. Alerts such as new messages or approval requests (Administrators only) are also displayed on the Home screen.

Click on the product name to launch the application.



2. Message Board

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




Click [+] to view details of the announcement.

| Message Board | | |
|---------------|--------------------------------|-------------------------|
| | Subject | Received |
| [+] | DCRB/PCRB Web Site Maintenance | 03/11/2019 12:30 PM EST |
| [+] | DCRB/PCRB Web Site Maintenance | 02/26/2019 03:39 PM EST |

3. Help Section

Select **Help Section** from the main menu to access the user guides and instructions for the various products. The user must have an installed copy of Adobe Acrobat Reader in order to view the guides.

Click the PDF icon to view the document.

| HELP SECTION | | | |
|---|--|---------|-------------|
| | Description | Size | Date Posted |
|  | Delaware Insurance Plan Depopulation Listing | 0.03 Mb | 01/09/2018 |
|  | Experience Rating Merit Rating User Guide | 0.06 Mb | 01/09/2018 |
|  | Medical Data Call Manager User Guide | 0.29 Mb | 01/09/2018 |


4. Request Status Change (Guest Users Only)

Select **Request Status Change** from the main menu to submit a request to change user type from a Guest User to a Carrier Group User, Insurance Department User or TPA. Status change requires approval from the group administrator. The user's access to the website will be temporarily unavailable until the request is approved by the administrator.

5. Request Access (Carrier Group Users Only)




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 the user needs access to and then click the **Request** button.

| APPLICATION ACCESS REQUESTS | | | |
|-------------------------------------|---------------------------|--|---|
| Request? | Application Name | Description | Date Requested |
| <input checked="" type="checkbox"/> | Invoice Online | View Invoices | |
| <input checked="" type="checkbox"/> | Medical Data Call Manager | Monitor Medical Data Call Submissions and Quality Statistics | |
| <input checked="" type="checkbox"/> | Policy Data Manager | View, Enter and Edit Policy Information | |
| <input type="checkbox"/> | Test Audit Online | Test Audit Statistics - Download | |
| <input type="checkbox"/> | Unit Data Manager | View, Enter and Edit Unit Stat Information | |
| <input type="checkbox"/> | WC Data Pro | View, compare and export premium and loss data | |
| Count: 6 | | | |
| | | |  |

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 the user needs 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, setup notifications and web services.

G. CARRIER GROUP ADMINISTRATORS

A key element of the Application Login 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 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:

*From: noreply@pcrb.com
Subject: User Requested Registration Approval*

There is currently a user awaiting your review for approval to access the DCRB/PCRB Application Login. Please login and either Approve or Reject the pending user(s).

Use the following link to access the Application Login: <https://www.pcrbdata.com/ul/default.aspx>

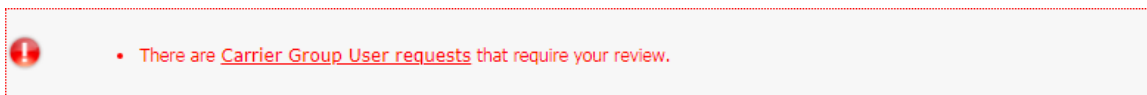
Name: John Doe
Email: centuralsupport@pcrb.com
Phone Number: (123) 456-7890 Ext:
Date Registered: 3/22/2019 4:03:23 PM

CONFIDENTIALITY NOTICE: This E-mail is intended only for the use of the individual or entity to which it is addressed and may contain information that is privileged, confidential and exempt from disclosure under applicable law. If you have received this communication in error, please do not distribute and delete the original message. Please notify the sender by E-Mail at the address shown. Thank you for your compliance.

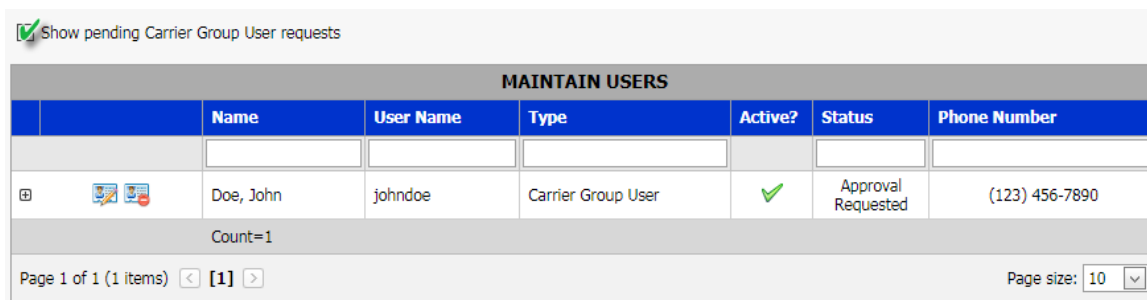
This email has been sent from an automated system. DO NOT REPLY.

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.

| User Profile | |
|---------------------|-------------------------|
| User Name: * | johndoe |
| Password: | (Re)Assign Password |
| First Name: * | John |
| Last Name: * | Doe |
| Title: * | Staff |
| Phone Number: * | (123) 456-7890 |
| Fax Number: | () - - |
| Email: * | centralsupport@pcrb.com |
| Company Name: * | PCRB |
| Company Address: * | 1 Example Rd |
| Company City: * | Philadelphia |
| Company State: * | PENNSYLVANIA |
| Company Zip Code: * | 19103 |
| Primary Carrier: * | Carrier Test Data |
| Status: | Approval Requested |
| User Type: | Carrier Group User |
| Department Name: | Carrier Test |

Ext:

[Update User Profile](#)

Assign Carrier(s) ⌵

Assign Application(s) ⌵

[Approve](#) [Reject](#) [Close](#)

- 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:

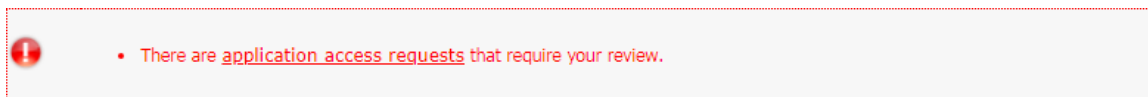
Name: John Doe
Email: centralsupport@pcrb.com
Phone: (123) 456-7890

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.



- 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 |
| | | | | | | |
| | Doe | John | Carrier Group User | PCRB | centralsupport@pcrb.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 |
|-------------------------------------|---------------------|---------------------------|
| <input checked="" type="checkbox"/> | Policy Data Manager | 03/26/2019 @ 04:03 PM EST |
| <input type="checkbox"/> | Unit Data Manager | 03/26/2019 @ 04:03 PM EST |
| Count: 2 | | |



- 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: * | johndoe | |
| Password: | (Re)Assign Password | |
| First Name: * | John | |
| Last Name: * | Doe | |
| Title: * | Staff | |
| Phone Number: * | (123) 456-7890 | Ext: <input style="width: 50px;" type="text"/> |
| Fax Number: | () - - | |
| Email: * | centralsupport@pcrb.com | |
| Company Name: * | PCRB | |
| Company Address: * | 1 Example Rd | |
| Company City: * | Philadelphia | |
| Company State: * | PENNSYLVANIA ⌵ | |
| Company Zip Code: * | 19103 | |
| Primary Carrier: * | Carrier Test Data ⌵ | |
| Status: | Approved | |
| User Type: | Carrier Group User ⌵ | |
| Department Name: | Carrier Test | |

Assign Carrier(s) ⌵

Assign Application(s) ⌵

- 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 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Experience Modification Calculator | Calculate Experience Modification | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Invoice Online | View Invoices | <input type="checkbox"/> | <input type="checkbox"/> |
| Medical Data Call Manager | Monitor Medical Data Call Submissions and Quality Statistics | <input type="checkbox"/> | <input type="checkbox"/> |
| Policy Data Manager | View, Enter and Edit Policy Information | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Rating and Underwriting Reference | Experience Modifications, Merit Ratings, Rating Values, Underwriting Guide | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Test Audit Online | Test Audit Statistics - Download | <input type="checkbox"/> | <input type="checkbox"/> |
| Unit Data Manager | View, Enter and Edit Unit Stat Information | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| View Authorized Class | Authorized Class | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| WC Data Pro | View, compare and export premium and loss data | <input type="checkbox"/> | <input type="checkbox"/> |

- 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*

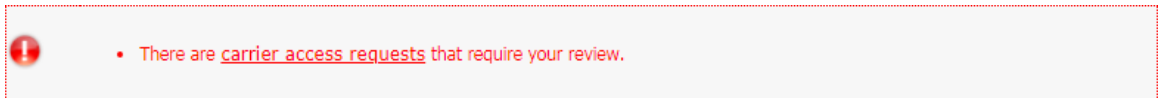
*User information:
Name: John Doe
Email: centralsupport@pcrb.com
Phone: (123) 456-7890*

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 carrier access requests link from the Home screen.



- 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 |
| | | | | | | |
| ⊕ | Doe | John | Carrier Group User | PCRB | centralsupport@pcrb.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 |
|-------------------------------------|-------------------|-------------|-------------|---------------|---|
| <input checked="" type="checkbox"/> | Carrier Test Data | 15066 | 88888 | 888 | 03/22/2019 @ 03:19 PM EST |
| Count: 1 | | | | | |
| | | | | | <input checked="" type="checkbox"/> Approve <input type="checkbox"/> Reject |

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

To modify CGU carrier access:

- Select **Carrier Group Admin** from the main menu and then select **Maintain Users** from the drop-down menu.
- On the Maintain Users screen, select the  icon to view the user's profile.
- On the User Profile screen, select **Assign Carrier(s)**.

User Profile ^

| | | |
|----------------------------|--|----------------------------------|
| User Name: * | <input type="text" value="johndoe"/> | |
| Password: | <input type="button" value="(Re)Assign Password"/> | |
| First Name: * | <input type="text" value="John"/> | |
| Last Name: * | <input type="text" value="Doe"/> | |
| Title: * | <input type="text" value="Staff"/> | |
| Phone Number: * | <input type="text" value="(123) 456-7890"/> | Ext: <input type="text"/> |
| Fax Number: | <input type="text" value="() - -"/> | |
| Email: * | <input type="text" value="centralsupport@pcrb.com"/> | |
| Company Name: * | <input type="text" value="PCRB"/> | |
| Company Address: * | <input type="text" value="1 Example Rd"/> | |
| Company City: * | <input type="text" value="Philadelphia"/> | |
| Company State: * | <input type="text" value="PENNSYLVANIA"/> | |
| Company Zip Code: * | <input type="text" value="19103"/> | |
| Primary Carrier: * | <input type="text" value="Carrier Test Data"/> | |
| Status: | <input type="text" value="Approval Requested"/> | |
| User Type: | <input type="text" value="Carrier Group User"/> | |
| Department Name: | <input type="text" value="Carrier Test"/> | |

Assign Carrier(s) ^

Assign Application(s) ^

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.

| Assign Carrier(s) ^ | | | |
|--|-------------|---------------|-------------------------------------|
| Carrier Name | NCCI Number | Bureau Number | Authorized to Use |
| Carrier Test Data | 15066 | 888 | <input checked="" type="checkbox"/> |
| 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 Account

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 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.

e. Reset User Password

To reset a CGU password:

- 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 whose password needs to be reset.
- c) On the User Profile screen, click the **(Re) Assign Password** button.

| User Profile | |
|--------------------|---|
| User Name: * | johndoe |
| Password: | (Re)Assign Password  |
| First Name: * | John |
| Last Name: * | Doe |
| Title: * | Staff |
| Phone Number: * | (123) 456-7890 |
| Fax Number: | () - |
| Email: * | centralsupport@pcrb.com |
| Company Name: * | PCRB |
| Company Address: * | 1 Example Rd |
| Company City: * | Philadelphia |
| Company State: * | PENNSYLVANIA |


Ext:

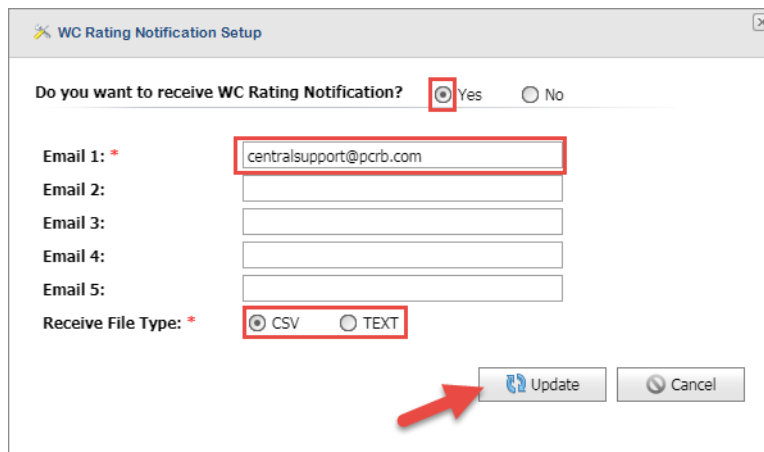
- d) Click the **OK** button on the confirmation dialog box displayed.
- e) The CGU will receive an email indicating that their password was reset. Within the email is the temporary password to sign in to the website.

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.



WC Rating Notification Setup

Do you want to receive WC Rating Notification? Yes No

Email 1: *

Email 2:

Email 3:

Email 4:

Email 5:

Receive File Type: * CSV TEXT


The following fields are contained within the CSV file:

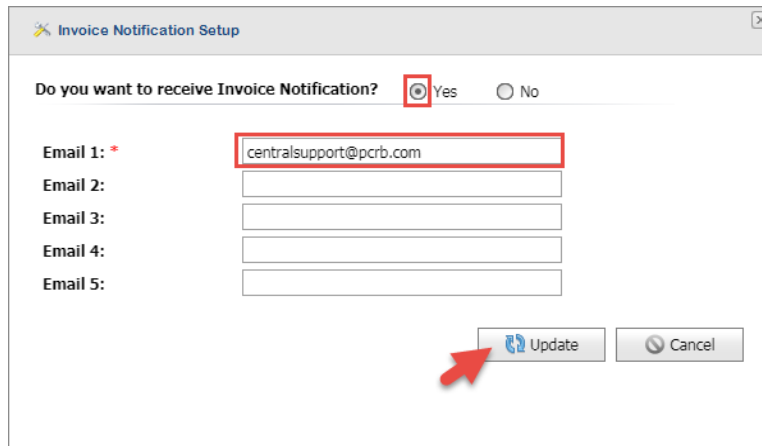
Note: CSV file contains a comma separating fields.

| 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:

- Select **Carrier Group Admin** from the main menu and then select **Notification Setup** from the drop-down menu.
- Click the  icon for **Invoice Online Notification Setup**.
- Select the **Yes** radio button to enable the notification.
- Enter up to five email addresses where the notifications are to be sent.
- Click the **Update** button.



Invoice Notification Setup

Do you want to receive Invoice Notification? Yes No

Email 1: *

Email 2:

Email 3:

Email 4:

Email 5:

g. Web Service Setup

Refer to the 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.

Web Services

User ID: *

Password: *

| Description | URL | Authorized to Use |
|--------------------------------|--|-------------------------------------|
| Get WCUnderwriting information | https://www.pcrbdata.com/WCUnderwriting/WCUnderwriting.asmx/GetWCUnderwriting?statecode=string&filenumber=string&feinnumber=string&startdate=string&enddate=string | <input checked="" type="checkbox"/> |



H. SUPPORT

Questions regarding the Application Login should be directed to the 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 date of receipt.