

**Financial Data Manager Application
2026 User Guidebook**

**For the Reporting of 2025 Data
Evaluated as of December 31, 2025
and Due to be Reported during 2026**

Financial Data Manager User Guidebook: Table of Contents

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I. Introduction

Financial Data Manager (FDM) is an Internet-based system that allows carriers to enter, edit and submit Financial Calls and Schedule W (Calls) subject to the Financial Data Incentive Program (FDIP) to the Pennsylvania Compensation Rating Bureau and the Delaware Compensation Rating Bureau, Inc. (herein collectively referred to as the Bureaus) and, for Schedule W only, to the Pennsylvania Insurance Department (Department).

FDM is a system designed to increase the timeliness and quality of data submissions by eliminating paper submissions, providing carriers with immediate feedback of failed edits and providing carriers with a central location for their data to ease the review of multiple calls. This system also provides carriers with the opportunity to view a log of criticisms sent by either the Department or the Bureaus.

This document will provide an overview of the functions available to carriers within FDM and helpful hints for using the application. It is recommended that the user read this entire document before using FDM.

Proper use of FDM requires specialized knowledge of workers compensation financial call reporting for the state of Pennsylvania and/or Delaware. This guide is not meant to replace individual Call instructions. The user will still need to refer to the individual Call instructions associated with a particular Call for the proper completion of the Call. **Instructions for individual Calls, Forms and Schedule W can be accessed via the Bureaus' website at www.pcrb.com for both Pennsylvania and Delaware (pcrb.com will bring you to the Bureaus homepage where you can select Pennsylvania or Delaware). Simply select the Data Reporting link, then click on Financial Data Reporting and finally select the Financial Call Package to find the list of call instructions.** Schedule W instructions can also be accessed on the Pennsylvania Insurance Department's website at www.insurance.pa.gov.

II. Annual Calls

FDM currently supports the submissions of the Following:

Call Acknowledgments

Pennsylvania Call #1 – Policy Year Call for Compensation Experience

Pennsylvania Call #1A – Calendar Accident Year Call

Pennsylvania Call #4 – Large Claim Experience by Policy Year Call

Pennsylvania Call #8 – Net (As Written) Large Deductible Policy Year Call

Pennsylvania Call #8A – Net (As Written) Large Deductible Policy Yr Call

Pennsylvania Call #9 – Gross (First Dollar) Large Deductible Policy Yr Call

Pennsylvania Call #9A - Gross Large Deductible Calendar-Accident Yr Call

Pennsylvania Call #14 – Pennsylvania Calendar Year Expense Data Call

Pennsylvania Call #15 – Policy Year Call for Catastrophe Experience

Pennsylvania Call #15A - Catastrophe Calendar-Accident Year Call

Pennsylvania Schedule W - (See Section III, Part VII, Item A)
Pennsylvania Schedule W – Constraints affecting Unpaid Claim Estimates (See section III, Part VII, Item B)
Pennsylvania Schedule W – Coal (See Section III, Part VII, Item C)
Pennsylvania Statutory Page 14

Delaware Call #1 – Policy Year Call for Compensation Experience
Delaware Call #1A - Calendar-Accident Year Call
Delaware Call #2 – Calendar Year Expense Data Call
Delaware Call #4 – Large Claim Experience by Policy Year Call
Delaware Call #8 – Net (As Written) Large Deductible Policy Year Call
Delaware Call #8A - Net Large Deductible Calendar-Accident Year Call
Delaware Call #9 – Gross (First Dollar) Large Deductible Policy Year Call
Delaware Call #9A - Gross Large Deductible Calendar-Accident Year Call
Delaware Call #12 – Assigned Risk Policy Year Call
Delaware Call #12A - Assigned Risk Calendar-Accident Year Call
Delaware Call #15 – Policy Year Call for Catastrophe Experience
Delaware Call #15A - Catastrophe Calendar-Accident Year Call
Delaware Statutory Page 14

All required Calls are included within FDM. Access to instructions are available via our website, www.pcrb.com.

III. Support Requirements

Browser requirements: Google Chrome, Microsoft Edge, or Firefox

Note: the application response time may vary depending on how you access the internet and the speed of your connection. The pictures of the screens shown in this guide may differ slightly from what you see on your screen depending on the resolution of your monitor.

This portal can be accessed via a link on the Bureaus' website, www.pcrb.com, by selecting the Application Login on the top right of the page. To use FDM, carriers must have a Bureau approved User ID and Password.

IV. Privacy and Security Statement

Carriers may view the Bureau's Privacy and Security Statement within FDM. The login screen for FDM contains a link which will provide access to the Privacy and Security Statement.

V. Terms of Service and Conditions of Use

Carriers may view the Bureau's Terms of Service and Conditions of Use for FDM. The login screen for FDM contains a link which will allow the user to view this agreement.

VI. Obtaining a User ID and Password

Note that the FDM is located within the Application Login of the PCRB website. Therefore, all users must be registered in the PCRB's Application Login. Carrier user access is managed directly through each Carrier Group Administrator (CGA), who have the ability to add and disable users for their company as necessary.

All carriers must have a completed FDIP/FDM Designation of Contact Person Form filed with the PCRB/DCRB. The Contact Person acts as a contact between his/her employer, the Bureaus and the Pennsylvania Insurance Department. This is designed to help coordinate and accomplish timely and accurate submission of financial data for all carriers. The Bureaus will provide this information to the Department so that all parties are aware of the appropriate contact for your group.

A new member will be emailed a link and code to access our Correspondence Manager. Once logged on, the carrier should complete the Financial Data Call Designation of Contact Person Form with all contact information. The form should then be electronically signed, dated and saved. The contact person does not have to be responsible for filling out financial calls or the Pennsylvania Schedule W. However, they will be responsible for seeing that calls and Pennsylvania Schedule W are submitted on a timely basis, securing responses to questions posed by either the Bureaus or the Department with respect to their group's financial calls or Pennsylvania Schedule W and for communication regarding the FDIP including payment of any assessments levied against their company. Existing Bureau members that need to change the Designated Contact Person (DCP) information should contact the Bureaus so that the form can be re-opened for updates.

IDs cannot be changed; however, users can change their password. The user should click on the "User Profile" Change Password" option and follow instructions.

VII. Logging In

To log in to FDM, please visit our website at www.pcrb.com. Carriers can log in via the *Application Login* button found on the top right-hand side of our website. A carrier must enter their approved User ID and Password into the appropriate fields to gain access to the application.

If a user forgets their password at the Login Page, they must click the "Forgot Password?" link. The user will then be taken to a screen where they must enter their Username then click the *Submit* button. Your password will be sent to your email address.

Note that the Application Login provides access to all the secured applications. Therefore, all users must be registered in the PCRB's Application Login. As is the case with most PCRB/DCRB products, carrier user access is managed directly through each CGA. If you are not a registered user in the Application Login, click on the First Time User link and complete the registration form as a Carrier Group User.

After registering, users should click on Request Access to contact the CGA for individual permissions as required.

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"/>	Financial Data Manager	View, Enter and Edit Financial Data Reporting	
<input type="checkbox"/>	Invoice Online	View Invoices	
<input type="checkbox"/>	Test Audit Online	Test Audit Statistics - Download	
<input type="checkbox"/>	WC Data Pro	View, compare and export premium and loss data	
Count: 4			

VIII. Home Screen FDM and Menu Items

Once successfully logged into FDM, the carrier will observe the *home* screen depicted below. Based on the User ID and Password, the application will identify the carrier group and display the carrier group name on the *home* screen.



To return to the *home* screen, select the “Home” icon on the top left-hand side of the navigation bar.

A. Menu Items

From the home screen, carriers may access one of the four menu options: **Search > Failed Edits Search, Acknowledgment, Call List, and FAQ**.

- 1. Search > Failed Edits Search:** This selection will bring the user to the “Failed Edits Search” screen.
- 2. Acknowledgment:** This selection will bring the user to the “Call Acknowledgements” Screen.
- 3. Call List:** This Selection will bring the user to the “Call Submissions for [Carrier group] [Call Year]” Screen.
- 4. Report Card:** This selection will bring the user to the new “Report Card” Screen.

5. FAQ: This Selection will bring the user to the “Frequently Asked Questions” screen.

In addition to the above items, the user can switch between a dark and bright color scheme. This can be done through the *Dark/Light Mode Selector* located on the top right-hand side of the navigation bar.

B. Announcements

The home screen will show general announcements from the Bureaus. This is located at the bottom of the *home* screen as depicted here:



Users should check this screen regularly to remain as informed as possible about data filing, and updates to the application.

To see all announcements that are not currently displayed, select “See all”. The user can then select individual announcements that they wish to view by clicking the *view* icon located on the right-hand side of the page.

C. Acknowledgment and Call List

The Call List option will display a window with all the Calls available to be modified, saved and/or submitted. **Note** all Calls will be displayed for both states, Pennsylvania and Delaware. However, the Calls will NOT be available until the user completes and saves the Call Acknowledgment.

A screenshot of a web-based application for managing call submissions. The title bar says "Call Submissions for 0 DEMO CARRIER GROUP 2023". Below the title are three input fields: "Call Year" (set to 2023), "Carrier Group" (a dropdown menu showing "Select Carrier Groups..."), and "Bulk Submit" (a button with a grid icon). At the bottom of the screen, there is a "Attachments" button with a paperclip icon and a progress bar indicating "CALL 1 DE" is in progress.

This requires you to select a Call year, pick the company you will be completing the Calls for and confirm the contact email. Once this form has been saved, the list of Calls for DE and PA will be displayed. Next, the user should either select “Will Submit” or “No Experience” for each Call and then select “Save” at the bottom of the screen. The Call List will then display the Calls you have indicated will be submitted.

All successfully imported data templates will be displayed as shown below in ascending order.

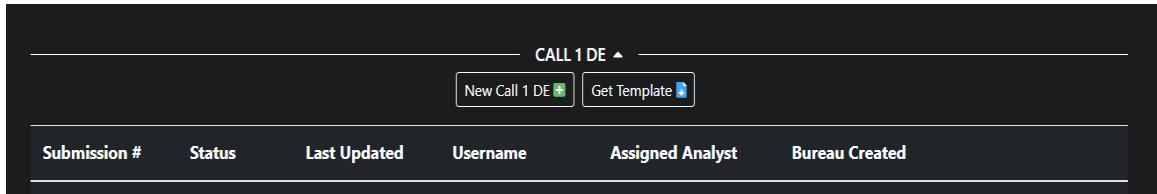
Call Submissions for 0 DEMO CARRIER GROUP 2021								
Call Year	Carrier Group	Attachments			Bulk Submit			
CALL 1 DE ▲								
Get Template								
Submission #	Status	Last Updated	Username	Assigned Analyst	Bureau Created			
1	Submitted 1 Rejected	02/07/2022	Ivette Caraballo	Glenn Trace	View			
2	Submitted	03/14/2022	Ivette Caraballo	Glenn Trace	View			
0	Draft	11/27/2024	Marc Ziss	Glenn Trace	Edit Delete			

The status will be displayed and the number of rejected issues regarding the submission will be displayed as a badge next to the status (highlighted in red). The user can open the call with the “Edit” option or “Delete” option. After submitting, the carrier will not be able to edit that submission but will be able to submit more if needed.

1. Navigation of Call Submissions on FDM

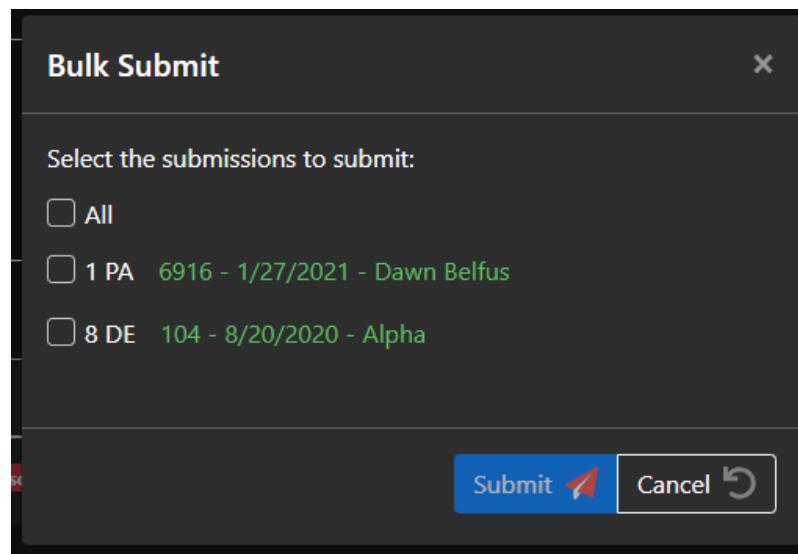
The user can also select the Call Year and Carrier Group from the dropdown. The Call Year is defined as data that is being reported for Financial Calls valued as of December 31 of that year. For example, if the user chooses 2019 for the Call Year, the data reported will be valued as of December 31, 2019. **Note this selection will only be available for Call Years 2019 and forward within FDM.**

The layout of the individual Call List is shown below and lists the following headings for each Call: **Submission #, Status, Last Updated, Username and Assigned Analyst.**



Submission #	Status	Last Updated	Username	Assigned Analyst	Bureau Created

- 1. Submission #:** Identifies the submission.
- 2. Status:** Will indicate whether the Call has been saved as a draft or submitted with a red flag for any edit explanations that have been rejected by the Bureau Analyst.
- 3. Last Updated:** Reflects the original date the Calls has been saved within the application.
- 4. Username:** Indicates the username of the individual who provided the draft or submission.
- 5. Assigned Analyst:** The Bureau Analyst responsible for reviewing the carriers Calls for that Call Year.
- 6. Edit and Delete:** User can edit and/or delete an existing draft within the application once a Call has been saved.
- 7. New Call and Get Template:** The user can select the “New Call [call will be displayed]” where the user can select the “Get Template” option where a Microsoft Excel spreadsheet that is formatted for this specific call will be downloaded.
- 8. Bulk Submit:** Item allows the user to submit data for all calls associated within the selected Call Year and Carrier Group that have been previously uploaded.



Bulk Submit

Select the submissions to submit:

All

1 PA 6916 - 1/27/2021 - Dawn Belfus

8 DE 104 - 8/20/2020 - Alpha

Submit  Cancel 

2. Navigation in a Call on FDM

Only one Call can be opened/viewed at any given time. To navigate through the Call, the user must use the scroll buttons to the right and bottom of the call.

It is recommended that the user moves deliberately from cell to cell using the mouse. The application response time may vary depending on how the user accesses the Internet. Recommended web browsers include the following: Google Chrome, Microsoft Edge, or Firefox.

Once inside a Call, users will have to click on the Call List located on the menu bar at the top of the page. If a user leaves a Call before saving it, by clicking on the Call List, the changes will be lost.

If at any time the application does not return the intended result, the user should click on the Refresh browser button. See below:

1. Back to Call List: Clicking the Call List link on the top menu bar will bring the user back to the Call Submissions screen.

2. Export to Excel: When you click on this link the Call data and headings are exported into an Excel workbook.

If the user wishes to save the Call in Excel, they can go to File, Save and proceed to name the file as they would any Excel other file. Once the Call is in Excel you can use the standard Print and Page Setup features available in Excel to print a copy of the Call for your files.

Additionally, exporting the Call data to Excel will allow the user to perform various ad hoc reports at their convenience. The Export to Excel option will return a different Excel file layout than that of the Import template layout so users can distinguish the export from the import. Do not use the export option to import data.

3. Validate Call: This function allows the user to review the quality of the Call data using the edits set forth in the FDIP. By reviewing the failed edits before submitting the Calls to the Bureaus, a carrier can resolve data problems or address data anomalies at the time of submission to potentially avoid incurring fines. A user may validate a call as needed on a saved call.

The user will need to click the **Ref Calls** on the left side bar choosing the calls you want to run against that call. If a saved version of a Call does exist, the user can

choose to run edits against that version if preferred.

If the user wishes to make no changes to the reference calls, then they should click on the OK button. If the user wishes to change the reference calls, then they should click on the radio button next to that call, followed by the OK button. The user will then need to click the save tab, then the validate tab located on the side bar.

The failed edits total will appear on the errors tab located on the side bar. The user should click on the errors tab and the failed edits will be listed for the user. Each edit will have a chat box below the edit to address these errors.

4. Saved Call: The **Save** button will save the data once the Call template has been imported without submitting the Call to the Bureaus. Once the Call is saved, a message will appear indicating that the Call was successfully saved. The user should not exit the screen until the user receives such message. If the user moves out of a Call without receiving the “Successfully Saved Call” message, the data that was just entered will be lost. Also, if the user clicks on a Menu Item before saving a Call, the application will not save the changes. The user must click the save button before the Submit button appears.

The user may import a Call template and save the data as many times as the user wishes without incurring any resubmission fees under the FDIP.

By utilizing the **Save** option, the user can review a Call, come back to it later and submit the Call once they are either satisfied with their data entries and/or failed edit explanations. Note only one version of a saved Call on FDM can exist at any given time. If the user imports a Call template and hits the Save button, this will overwrite the previously saved version.

The user should save the call before validating the call to see the errors. Carriers must address all errors before you will be able to submit the call. Since many of the edits are dependent on the individual Call’s relation to other Bureau Calls, it is recommended that the user save ALL Calls to generate all the possible edit failures before submitting a single Call.

5. Submit: The **Submit** button sends the Call to the Bureaus. The user must click the save button before the Submit button appears. Before FDM sends the Call to the Bureaus, the user must address all edits that have errors. If the user tries to submit a call that has errors that have not been addressed, they will receive the message “**Error Submitting Submission!**”.

The user will find the **Submit** button located on the sidebar. Once the user clicks the **Submit** button, a pop-up box will appear. Then, the user will need to answer the questions before clicking the submit button located at the bottom of the pop-up box.

When the user clicks the **Submit** button with all errors having been addressed, you will receive the message **“Successfully Submitted”**.

After the Call has been submitted, the user can go back to the menu bar to click Call List. It is here where you can see the submission information.

The status of the Call is now **Submitted**. The **Submitted Call** is accessible only through the **View** Menu item.

6. Reference Calls: This feature will display the Calls against which the edits were run. These are the Calls that were selected by the user after clicking on **Ref Calls** located on the sidebar. The user can navigate through the **Ref Calls** by using the scroll bars at the bottom and to the right of the call.

The ratio report from the prior year is also available to view. This report will be displayed as a tab on the call. The user can use this report to compare the ratios reported on the current report to those reported on the prior year's call.

7. Notes: Carriers may use this feature to provide further explanations for failed edits and data anomalies.

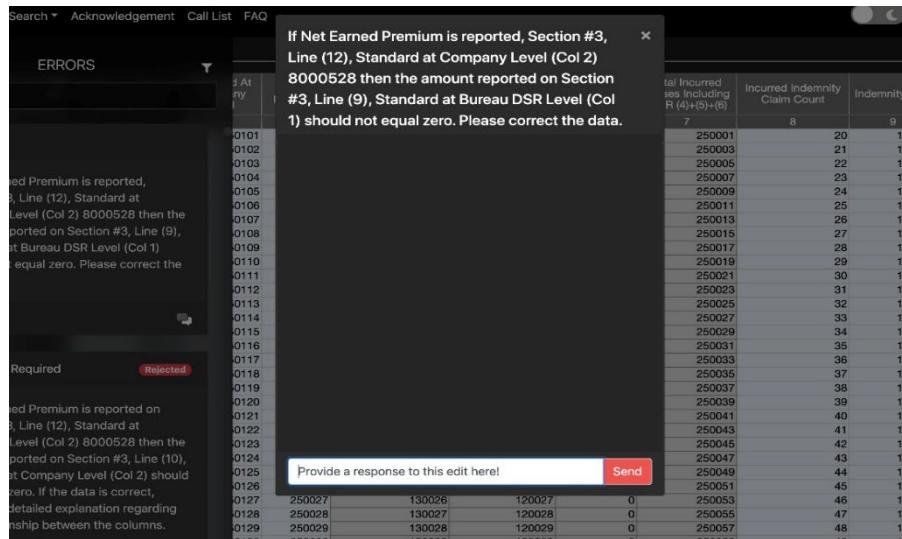
8. Errors: This feature is where the user will address failed edits or data anomalies at the time of submission.

The user must **Save** and **Validate** their call to view any triggered validation errors.

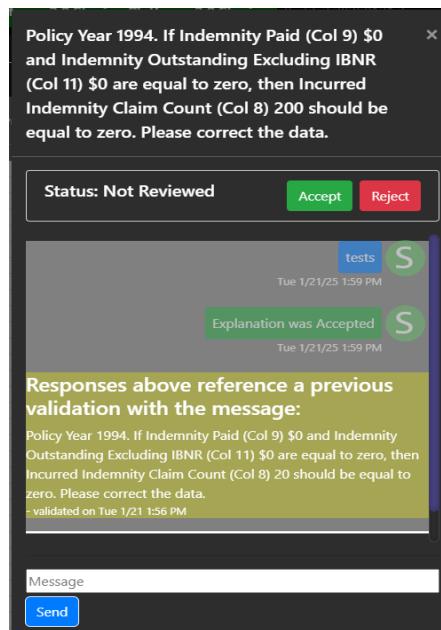
To create a response for an error, the user must go to an error and click the *chat box* icon located on the bottom right corner of the edit.

Standard At Company Level	Net Premium	Total Paid (9)+(10)	Total Outstanding Excluding IBNR (11)+(12)	Total IBNR(13)+(14)	Total Incurred Losses Including IBNR (4)+(5)+(6)
2	3	4	5	6	7
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0

A *chat box* will appear, the user can click on the box that says “Message” to write their notes. Once the user finishes addressing the error, click on the “Send” button.



Responses must be provided for each error. Previous responses can be viewed (for both Saved or Submitted Calls) by clicking on the “Errors” on the sidebar of each Call. They can be viewed, and additional comments can be added in the message bar of the edit.



Edit responses between consecutive submissions of calls are carried over on the

most recent iteration. If the data points present on the edit have changed, the prior edits error message, and response, will be displayed within the error's text, as demonstrated above. The prior edit message and response is displayed for ease of reference. New responses to the edit are still required as the prior edit message in the yellow box does not satisfy the response requirement.

Note that if you need to revise a Call, you must make the revisions in the Call template and then import the Call into FDM. As a result, any responses pertaining to that Call will have to be re-entered.

3. Navigation in an Excel Call Template

In order to report Call data, users must begin by downloading the Excel template provided in FDM. (This is generally referred to as the **Get Template Function** of FDM.) The user can access the required Excel template from the **Get Template** link under the call. Provided that the call is required to be reported, the user should click on the **Get Template** button. FDM will automatically export and download the Excel Template. Users can re-name a template if they desire.



Once the template is saved on the user's local hard drive or network, carriers can log off FDM and work directly in Excel. However, users must return to FDM when they are ready to import the created Call back into the application.

1. Layout: Users will find that the Call layout within the templates is like the versions of the Calls within FDM. This includes reconciliation pages where applicable.

2. Navigation: Saved on the user's local hard drive or network, carriers can log off FDM and work directly in Excel.

3. Data Entry: The template is a protected Excel workbook that includes calculated fields. Users should only enter data into those cells formatted white in the Pennsylvania and Delaware call templates. Cells that are formatted grey are calculated cells. Excel will automatically populate these calculated cells once the user enters data into the dependent cells. The user will need to manually add the values on Section 3 of the call, into the cells that are not grey. Users should not attempt to alter calculated fields. If any fields are altered, the template may not be imported into FDM correctly.

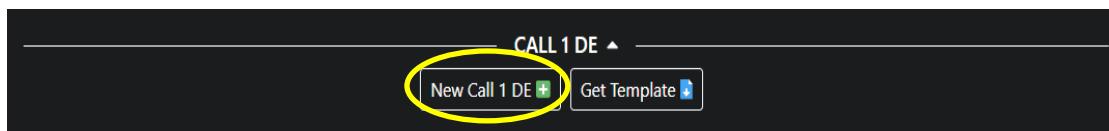
Note If the user chooses to paste data from another Excel file into the Excel

template, they must use the Edit, Paste Special, Values function. If the user chooses the general Paste function, the formatting on the template will be lost.

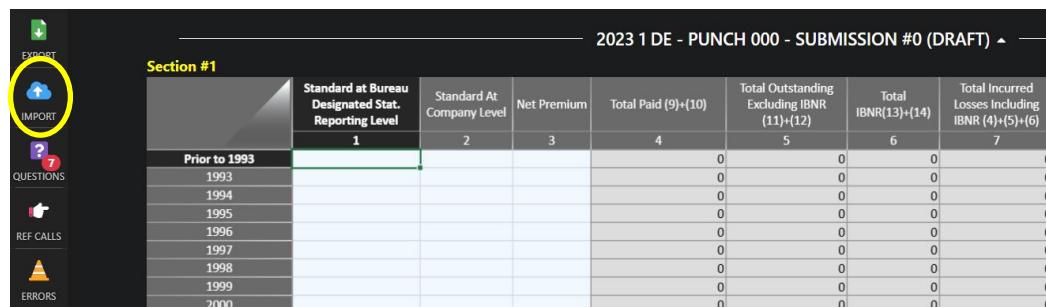
Note Line Y is not automatically populated within FDM, the user will need to add these values to their template.

Once the template is imported into FDM, all formulas within FDM remain intact. Any changes made within FDM to the imported data will be calculated accordingly.

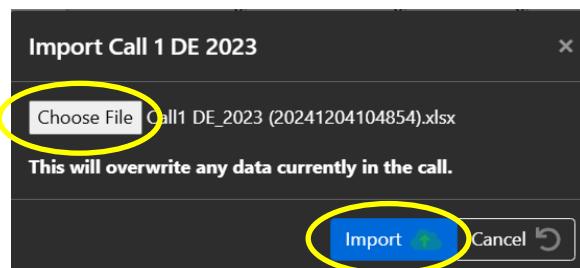
ii. **Importing the template into FDM:** Once the user has entered data into the template, the user must save the file to their local hard drive or network. When the file is saved, the user must choose **Call List** and then **New Call** under the Call to which you want to import the template. Be sure that the template is closed before beginning.



Once the New Call screen has been opened, click on the **Import** button shown on the sidebar.



Click on **Choose File** and find the appropriate excel template file containing the call data. Once the file is highlighted in the **Choose File** window, click "open." This will select the file and return you to the website. Confirm that the file name displayed is the correct file. If the file name is incorrect, repeat the process. If the filename is correct, click the **Import** button.



Once the file has been imported, the user should save the data by clicking on the **Save** button on the sidebar. After saving the template, it will then be saved in FDM

as a **Saved Call**. Only then can the user begin the process of validating the call and responding to triggered errors within the application.

5. Draft: Only one **Draft** is available to be submitted and will be shown under each Call listed in the *Call Submissions* List. The user can view the drafted Calls by clicking on the edit link of a particular Call.

If there are no **Saved Calls**, the word “NONE” will be shown beneath the call.

The user can access the previously **Saved Call** by clicking the **Edit** button.

The **Save** button will save the data without officially submitting the Call to the Bureaus. Once the Call is saved, a message will appear indicating that the Call was successfully saved. The user should not exit the screen until they receive such message. The user may import a Call template and save data as many times as they wish without incurring any resubmission fees under the FDIP. The purpose of this option is to allow a user to save Calls in progress and run edits and/or add their explanations later.

Remember, only ONE version of a **Saved Call** can exist at any given time for each Call and Schedule W.

If the user imports a Call template containing revised data and clicks on the **Save** button, this will overwrite the previously saved version of the Call. Keep in mind that the edits can run against **Saved Calls or Submitted Calls**. Therefore, if the user has imported a Call template containing revised data and does not save the Call, the edits will revert to the last saved version of the Call. A Call will remain saved until it has been submitted.

The user can also delete a Saved Call by clicking on the delete button, then responding, ‘Yes’ to the question “Are you sure?” on the pop-up box. Once a user deletes a Saved Call, it will no longer be available to the user.

6. Submitted Calls: All previously **Submitted Calls** will be shown under each Call listed in the *Call List*. If a particular Call has been submitted more than once, the user will be able to view all previous versions of the Call submissions.

The user can view the list of **Submitted Calls** by clicking on the **View** button of a particular Call. The information given for Submitted is as follows:

Submission #: The Submission # will display If the Call was submitted for the first time. Only that submission will be shown. If a call has been resubmitted, the newest call will show at the bottom of that list in dated order.

Username: The Username field will display the name of the user that submitted the Call based on information provided by the contact person.

Status: The status will show that the Call is a Draft (saved) or submitted.

Last Updated: The Last Updated date will display the date the submission was last saved or the date the submission was received by the Bureaus.

The user can gain access to previously Submitted Calls by clicking **View** of the call they would like to retrieve. The application will then open the Submitted Call.

7. Change Call Year: FDM is designed to manage multiple Call Years. For all Calls and Schedule W, FDM will allow users to view, modify and submit the Calls for reporting years 2019 and subsequent.

Each time a user logs in, the Call Year will default to the current year. If, during any session, the carrier wishes to see another Call Year, they can change the Call Year via the dropdown option and choose the year.

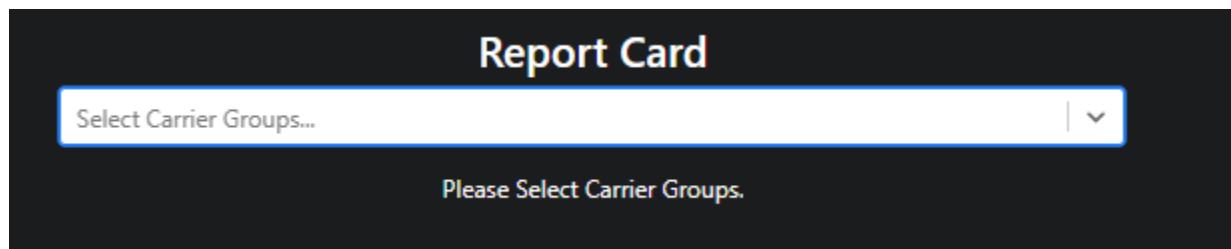
The user can toggle among the available Call years. This change will be reflected for any portion of the website but will only be in effect for that login session. If the user logs out and immediately comes back in, the Call Year defaults back to the current year.

D. Carrier Report Card

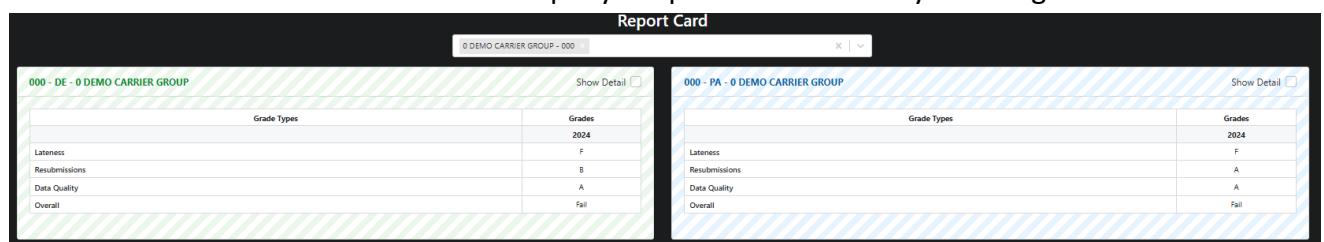
Carrier Report Card can be located along the banner in the top left of the FDM application.



The Report Card option will display a window containing our newly added carrier report card. **Note** only states in which the carrier reports Calls will be displayed.



The user will have access to view the company's report cards that they are assigned to.



The user will be able to view the three grade types used to grade each carrier, as well as their associated grades.

1. Lateness: The average number of days late per call that is submitted late (i.e. If Call #1, Call #4, Call #8, and Call #9 were submitted one day after the due date and all other calls were on time, an average of one day late is used for the grade).
 - A – 0 days late
 - B – Less than 2 days late
 - C – Between 2-4 days late
 - D – Between 4-10 days late
 - F – Greater than 10 days late
2. Resubmissions: The number of Calls submitted after the original submission for each call type.
 - A – Zero resubmissions
 - B – Between 1-3 resubmissions
 - C – Between 4-6 resubmissions
 - D – Between 7-10 resubmissions
 - F – Greater than 10 resubmissions
3. Data Quality: The number of business days that the carrier remained on-the-clock to answer all criticisms received in a year.
 - A – Less than or equal to 10 business days OTC
 - B – 11-20 business days OTC
 - C – 21-30 business days OTC
 - D – 31-40 business days OTC
 - F – 41-55+ business days OTC
4. Overall – This is a pass/fail grade. If any of the prior three criteria contain an “F” grade, the carrier will have a “fail” grade for the state.

Users will have the ability to view a detailed breakdown of the metrics behind the grades by selecting the “Show Detail” button. The user will then be presented with the values used to generate each respective grade.

The screenshot displays two carrier groups: 000 - DE - 0 DEMO CARRIER GROUP and 000 - PA - 0 DEMO CARRIER GROUP. Each group has a 'Show Detail' button highlighted with a red box. Below the buttons are tables showing grade types and overall grades. The DE group shows a mix of grades (F, B, A) and an overall fail. The PA group shows a mix of grades (F, A) and an overall fail. The bottom section of the screenshot shows detailed breakdowns of report types and resubmissions for each carrier group, with the DE group showing more data than the PA group.

Report Types	Total Days Late
Acknowledgement Form	2024
Call 1	0
Call 1A	21
Call 2	192
Call 4	21
Call 9	
Call 9A	
Call 12	
Call 12A	
Call 15	
PiG 14	

Report Types	Number of Resubmissions
Acknowledgement Form	2024
Call 1	1
Call 1A	0
Call 2	
Call 4	1
Call 9	0
Call 9A	0
Call 12	0
Call 12A	0
Call 15	0
PiG 14	0

Days OTC	2024
0	

E. FAQ Section

FAQ is an option on the menu bar where the user can see answers to questions that are most frequently asked. This list will be a continually growing list and will be displayed as the Bureaus update it.

Section Two – General Information on Entering Call Data

I. State Specification

FDM supports all Calls for both the state of Delaware and the state of Pennsylvania. The user does not have to do anything extraordinary within the application to be in either state's version of the application. State specification is assigned to the Call name, e.g., *Delaware Call #1 or Pennsylvania Call #1*.

<u>Abbreviations</u>	<u>Full Name of Call</u>
1 DE	Delaware Call #1
1A DE	Delaware Call #1A
1 PA	Pennsylvania Call #1
1A PA	Pennsylvania Call #1A
2 DE	Delaware Call #2
4 DE	Delaware Call #4
4 PA	Pennsylvania Call #4
8 DE	Delaware Call #8
8A DE	Delaware Call #8A
8 PA	Pennsylvania Call #8
8A PA	Pennsylvania Call #8A
9 DE	Delaware Call #9
9A DE	Delaware Call #9A
9 PA	Pennsylvania Call #9
9A PA	Pennsylvania Call #9A
12 DE	Delaware Call #12
12A DE	Delaware Call #12A
14 PA	Pennsylvania Call #14
15 DE	Delaware Call #15
15A DE	Delaware Call #15A
15 PA	Pennsylvania Call #15
15A PA	Pennsylvania Call #15A
PG. 14 DE	Delaware Statutory Page 14
PG. 14 PA	Pennsylvania Statutory Page 14
PA Schedule W	Pennsylvania Schedule W
PA Schedule W - Coal	Pennsylvania Schedule W – Coal

II. Group Reporting

Carriers may choose to report data on an individual company or group basis, or for separate subsets of carriers within a group. Carriers accomplish this with their submission of a carrier Contact Form which is then used in setting up FDM. Statutory Page 14 information should be entered on an individual carrier basis for each company within the reporting entity. (*For specific Statutory Page 14 Information please refer to Section Three, Item VIII.*) If a carrier group elects to submit separate Calls for individual carriers within their group or to submit separate Calls for

subsets of the carriers comprising their entire group, each separate Call submission will be treated separately for all purposes of FDM and FDIP.

Carriers are required to report all Calls and Schedule W on a consistent basis and as defined in the carrier Contact Form. If a carrier feels that FDM does not properly reflect a carrier or group's reporting preference, the carrier should contact the Bureaus immediately. Once the Call Acknowledgment is submitted, the Bureaus will prepare the application to process the data accordingly. Carriers are encouraged to consider potential ramification of FDIP and FDM in deciding on the basis (carrier, group, or subgroup) to be used in reporting their data.

III. Entering Data

The user must download the template of the Call for which they want to enter data. Once the data has been entered into the template, the user must then import the template into the corresponding Call on FDM by using the *New Call* button and then selecting Import. The application accepts only whole numbers and rejects any decimals. Negative values should be entered with a negative sign preceding the numeric value. The application does **NOT** accept non-numerical entries in numerical data fields.

If at any time the application does not return the intended result, the user should click on the *Refresh* browser button. When reporting data for multiple reporting entities, you must NOT use the *Back* button on your browser to move among the Calls. Instead, users should log in and out of FDM to ensure that FDM registers the identification information.

IV. Calculated Fields

For the user's convenience, some Call fields in the application are calculated or are automatically populated by the application. The user must not alter or try to alter calculated fields. Altering calculated fields may result in failed edits and the potential to incur large fines.

Fields that the application automatically populates will constantly be refreshed when the Call is saved. Once a Call is submitted, the fields are frozen.

V. No Experience

Calls should not be submitted for any state in which the carrier(s) have never had experience. In this case, the Call Acknowledgements should be completed with *No Experience* checked off.

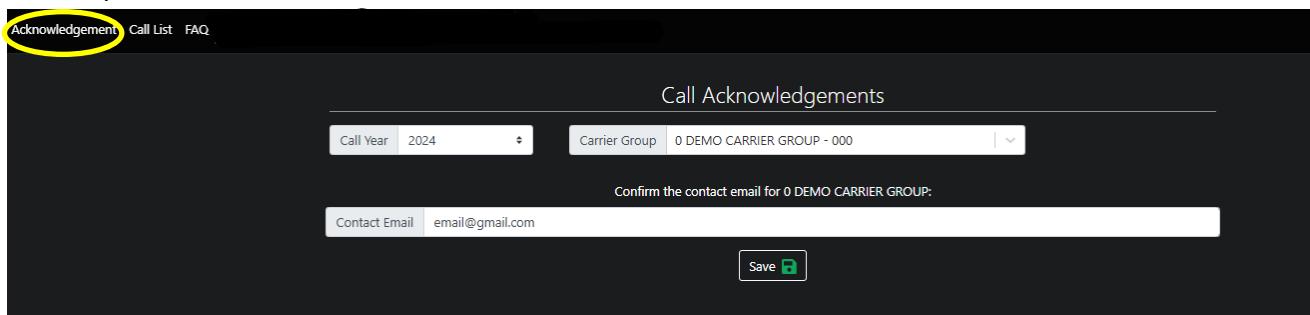
If a carrier has no Statutory Page 14, Line 16, Workers Compensation experience, the user should enter zeroes directly into the Statutory Page 14 fields. This will allow the Bureau to distinguish between carriers who incorrectly submit a blank Statutory Page 14 versus those with true zeros.

In instances where for one or more, but not all, of the Policy Year lines on the call, the carrier failed to have experienced in a given state, input zeros across the appropriate Policy Year Line(s) for that state, or simply leave those fields blank.

Section Three – Specific Information on Entering Call Data

I. Call Acknowledgments

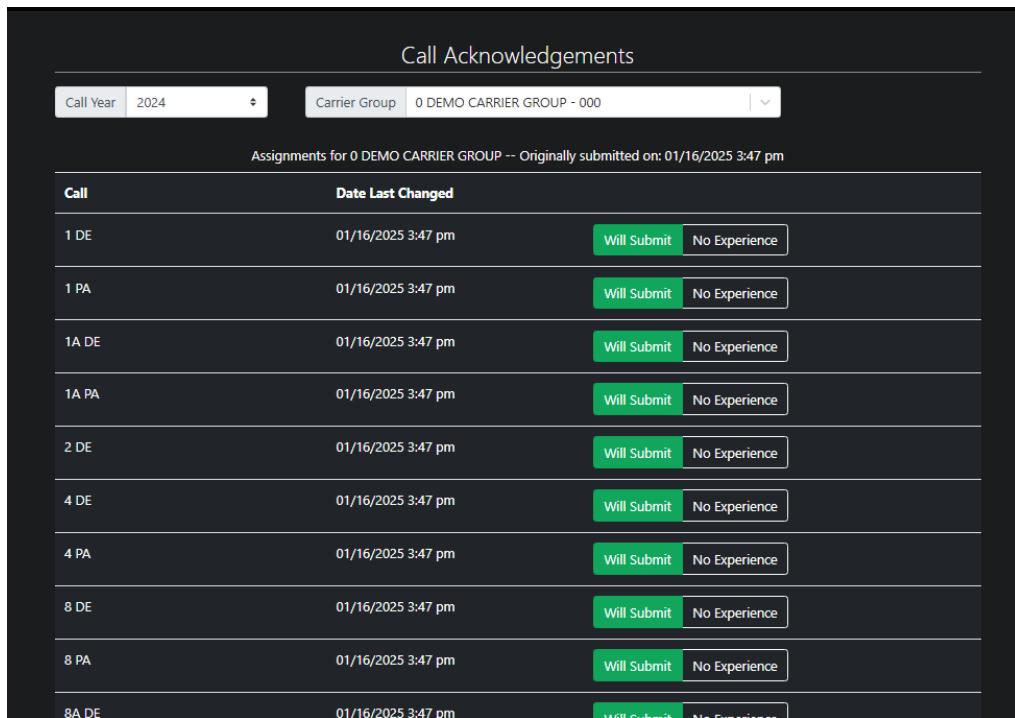
Prior to selecting a new Call year, the user must first select the **Acknowledgement** in the header menu in the upper left corner. In the next step, the user will select the year that they wish to create a new call for and the carrier group as well as provide the contact email address. When completed, select the **Save** button.



The user will then be presented with the various call assignments that will apply to the selected carrier (group).

The user will select the “*Will Submit*” option for the Calls that will be submitted for the selected carrier (group) and year. The user will select the “*No Experience*” option for the Calls that do not have any data to report for the selected carrier (group) and year. When finished acknowledging all Calls as either “*Will Submit*” or “*No Experience*”, the user will select the **Save** button.

Please be sure to click the **Save** button at the bottom of the screen to save the selections made for the Acknowledgement Form.



Call	Date Last Changed	Will Submit	No Experience
1 DE	01/16/2025 3:47 pm	Will Submit	No Experience
1 PA	01/16/2025 3:47 pm	Will Submit	No Experience
1A DE	01/16/2025 3:47 pm	Will Submit	No Experience
1A PA	01/16/2025 3:47 pm	Will Submit	No Experience
2 DE	01/16/2025 3:47 pm	Will Submit	No Experience
4 DE	01/16/2025 3:47 pm	Will Submit	No Experience
4 PA	01/16/2025 3:47 pm	Will Submit	No Experience
8 DE	01/16/2025 3:47 pm	Will Submit	No Experience
8 PA	01/16/2025 3:47 pm	Will Submit	No Experience
8A DE	01/16/2025 3:47 pm	Will Submit	No Experience

The user can change their applicability by selecting the appropriate year and then change the “No Experience” option to “Will Submit” or vice versa then select the **Save** button.

Once a user is prepared to work on the Calls, they should click on the Call List located on the menu bar. The desired Call year and Carrier Group should be selected, along with a list of the Calls to be submitted. The user should download and save the template for the Calls to be completed.

II. Policy Year Calls (#1, #8, #9 and #12)

Policy Year Calls #1, #8, #9 and #12 must be submitted using FDM. The layout of all the Policy Year Calls Collected within FDM are generally the same. The Calls differ only in the types of coverage collected, the number of policy years collected, and the additional reconciliation page required on Call #1.

The Policy Year Call layout requires 26 Columns to be completed for Delaware and 22 Columns to be completed for Pennsylvania.

A. Premiums (Columns 1, 2, and 3)

All data is to be entered on an accumulated basis. The proper entering of the premium field is essential to successfully pass the Call edits.

Once the premium data is entered into the template, imported and saved, the user can view the Ratio Report tab. This tab contains a report that displays the ratio of Column 2 (Standard Earned Premium at Company Level) to Column 1 (Standard Earned Premium at Bureau Level). The user can also view the “Ratio Report – Info” tab. This tab contains the ratio of calendar year premium reported for Terrorism and or Catastrophe premium compared to the calendar year net earned premium.

B. Losses (Column 4 through 7, Columns 9 through 18, Columns 21 through 26)

Since Columns 4 through 7 are calculated columns, the user **must begin entering loss information on the Call template starting with Columns 9 through 14**.

C. The template will automatically calculate Columns 4 through 7 and Column 26 as you complete Columns 8 through 25. **Claim Counts (Columns 8, 19 and 20)**

Column 8 is not a calculated field. The user must enter claim count information into Column 8 as well as in Columns 19 and 20. The sum of Columns 19 and 20 will be verified against Column 8 during the editing process.

D. Line X (all Columns)

Line X is a calculated field that cannot be altered. Line X is the sum of all the individually reported policy year lines plus the “Prior to” line.

E. Line Y (all Columns)

Based on the Call instructions, the prior year's Call Line X should equal the current Call's Line Y. The values entered on Line Y will be checked against the Line X values reported on the prior year Call that was submitted to the Bureau when the user validates the Call.

If the user chooses to report Line Y values that do not match the prior years' Line X, they are required to explain why they made these changes at the time of submission either in the Create Notes to Bureau section or in a letter via electronic or regular mail.

F. Line Z (all Columns)

Line Z is a calculated field that cannot be altered. Line Z represents the current years' Calendar Year contribution by subtracting Line Y from Line X.

Once the template is completed, the carrier should import it using the **Import** function located on the sidebar to the left of the screen.

Next, the user should click on the **Questions** section located on the sidebar on the left side of the screen which contains a series of questions. All carriers are required to respond to each question. The answers to Questions #1 through #3 currently default to "Yes". The user must review and change this answer as needed.

Question #1a asks if your company reports bulk and #1b asks where is the bulk included. Does your company currently report all bulk reserves for indemnity and medical under the IBNR columns 13 and 14? This will determine if a carrier needs to fill out Columns 15 through 18 on Section 1. If the user answers "In IBNR" to Question #1b, then the user must leave Columns 15 through 18 blank. The template will allow the user to enter data into Columns 15 through 18 even if the response to Question #1b is "In IBNR", however, an error message will be generated when the edits are run alerting the user of this issue.

If the user answers "In Outstanding reserves" to Question #1b, and the company currently reports any bulk reserves for indemnity and medical under the outstanding, excluding IBNR columns 11 and 12, the user must enter data into Columns 15 through 18. Then columns 15+16 on Section #1 must equal Column 11 and Columns 17+18 on Section #1 must equal Column 12. If the user does not enter data into Columns 15 through 18 when the response to Question #1b is "In Outstanding reserves", an error message will be generated when the Call is validated alerting the user of this issue.

(The user should refer to the specific Call instructions and consult with the appropriate people within their organization to determine the proper response to these questions.)

Columns 23 through 26 are required on Delaware Calls **only**.

G. Reconciliation Page

Section 3 of Call #1 is a Reconciliation Page. This page reconciles Call #1 data, various other Call data and other direct coverage data with the Statutory Page 14. The user must enter data on Lines 2, 3, 5, 6, 7, 8, 9, and 10, if applicable. The application will

automatically calculate and populate the remaining cells. If a difference greater than \$5,000 or less than -\$5,000 exists between the Calls and the Statutory Page 14, a validation will be generated for which the user must enter an explanation in the chat box provided.

Instructions for the Policy Year Calls – Calls #1, #8, #9, and #12 can be found on the Financial Call Package section of our Pennsylvania and Delaware websites—just go to www.pcrb.com, click on **Data Reporting**, then click on **Financial Data Reporting**, now select the **Financial Call Package** and the instructions are listed.

III. Delaware Calendar Year Expense Data – Call #2

The Calendar Year Expense Data Call #2 must be submitted using FDM. Data must be submitted on the same basis as reported on Call #1, i.e., individual versus group basis.

A. Layout

The Call consists of two sections, some of which contain calculated fields. Section 1 is to be filled in by the carrier and Section 2 is the Reconciliation Page. Once the user has uploaded their Call #2 template into FDM, the application will complete the Section 2 data fields for the user by pulling values from other Call data fields within the program. If no imbalance exists between the Call data and Statutory Page 14, then the user will not be required to enter any additional information on this section.

However, if a difference exists greater than \$5,000 or less than -\$5,000 between the Call #2 and the Call #1 or the Call #2 and the Statutory Page 14, a validation error will be generated. This will require the user to provide an explanation in the chat box along with the error message.

Instructions for the Delaware Calendar Year Expense Data – Call #2 can be found on the Financial Call Package section of our Delaware website. To start, go to www.pcrb.com, select DCRB, click on **Data Reporting**, and select a Financial Call year from the drop-down menu. This will lead you to the **Financial Call Package**, where the instructions are listed.

IV. Large Claim Experience by Policy Year Call #4

The Large Claim Experience by Policy Year Call #4 must be submitted using FDM. When the user uploads the template into FDM, the application will automatically sum each Policy Year within each coverage code. This will allow the user to make immediate comparisons to data reported in other Policy Year Calls.

A. Layout

Below is an excerpt of the Large Claim Experience by Policy Year Call #4 included within the application.

Note the user must use the Call #4 template and import it into FDM, however, the layout of the Call #4 in the application and the template are very similar:

2024 CALL 4 DE - PUNCH 000 - SUBMISSION #0 (DRAFT) ▾												
Sheet1												
Policy Year	Claim Number	Accident Date	Indemnity Paid as of 12/31/2023	Indemnity Case Reserve as of 12/31/2023	Medical Paid as of 12/31/2023	Medical Case Reserve as of 12/31/2023	Indemnity Paid as of 12/31/2024	Indemnity Case Reserve as of 12/31/2024	Medical Paid as of 12/31/2024	Medical Case Reserve as of 12/31/2024	Deductible Am	
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
21												
22												
23												
24												
25												
26												

The user should enter the claim information into the twelve columns provided. The carrier must enter both the current and prior year claim values on the template.

Instructions for the Large Claim Experience by Policy Year - Call #4 of this application can be found on the Financial Call Package section of our Pennsylvania and Delaware website— To start, go to www.pcrb.com, click on **Data Reporting**, and select a Financial Call year from the drop-down menu. This will lead you to the **Financial Call Package**, where the instructions are listed.

V. Pennsylvania Calendar Year Expense Data Call #14

The Pennsylvania Calendar Year Expense Data Call #14 must be submitted using FDM

A. Layout

For Section 1, simply enter the data in the fields provided on the template and proceed to the next section. Here is an excerpt of Section 1 of the Pennsylvania Calendar Year Expense Data, Call #14 included within the application and on the template:

2024 CALL 14 PA - PUNCH 000 - SUBMISSION #0 (DRAFT) ▾												
Section 1 - PA Call #14												
1. Loss Adjustment Expenses												
(a) Allocated Loss Adjustment Expenses – PAID												
(b) Allocated Loss Adjustment Expenses – INCURRED												
(c) Unallocated Loss Adjustment Expenses – PAID												
(d) Unallocated Loss Adjustment Expenses – INCURRED												
2. Acquisition												
(a) Commissions and Brokerage – INCURRED												
(b) Other Acquisition – INCURRED												
3. General Expenses – INCURRED												
4. Taxes, Licenses and Fees – INCURRED												
Powered by GrapeCity SpreadJS. Your temporary deployment key expires in 308 day(s).												
Section 1 - PA Call #14												
Section 2 - RECONCILIATION PAGE												

Section 2 of the Call #14 is a reconciliation report that automatically pulls data from Section 1 once the template has been uploaded into FDM and compares it to data pulled from the Statutory Page 14. Any differences are calculated from this comparison. A *reason for differences in* field is provided where any imbalance must be explained. Below is an excerpt of Section 2 of the Call #14 included within FDM and is shown similarly on the template:

2024 CALL 14 PA - PUNCH 000 - SUBMISSION #0 (DRAFT) ▾				
Section 2 - RECONCILIATION PAGE				
	Direct Allocated Loss Adjustment Expenses - PAID	Direct Allocated Loss Adjustment Expenses - INCURRED	Commissions & Brokerage Expenses	Taxes, Licenses & Fees
I. Calendar Year Call #14				
Section I, Line (1a)	0			
Section I, Line (1b)		0		
Section I, Line (2a)			0	
Section I, Line (4)				0
II. Statutory Page 14 *	0	0	0	0
III. Difference (explain in Q&A)* (III) - (I)	0	0	Powered by GrapeCity SpreadJS. Your temporary deployment key expires in 308 day(s).	

Section 1 - PA Call #14 Section 2 - RECONCILIATION PAGE

Instructions for the Pennsylvania Calendar Year Expense Data – Call #14 can be found on the Financial Call Package section of our Pennsylvania and Delaware website. First, go to www.pcrb.com, click on **Data Reporting**, then click on **Financial Data Reporting** and select a Financial Call year from the drop-down menu. This will lead you to the **Financial Call Package**, which is where the instructions are listed.

VI. Policy Year Call for Catastrophe Experience #15

A. Layout

The Policy Year Call for Catastrophe Experience #15 must be submitted using FDM. Please review the Call #15 instructions to obtain a list of specific catastrophe codes included in Call #15 Layout.

Call #15 requires the selection of “YES” or “NO” for question #1 and entry of the appropriate catastrophe code loss information. Keep in mind, however, that the Delaware Call #15—in contrast to the PA Call #15—also collects catastrophe code loss information on residual market business consistent with Delaware Call #12.

Below is an excerpt of the Policy Year Call for Catastrophe Experience #15 included within FDM and is shown similarly on the template:

SECTION 1 - Call #1						
	Claims Closed with Payment	Open Claims	Total Claims	Indemnity Paid	Medical Paid	Indemnity Case O/S
	1	2	3	4	5	6
2000	1					
2001		2				
2002			3			
2003						
2004						
2005						
2006						
2007						
2008						
2009						
2010						
2011						
2012						
2013						
2014						
2015						
2016						
2017						
2018						
2019						
2020						
2021						
2022						
2023		23				

Powered by GrapeCity Spreadsheet. Your temporary deployment key expires in 308 day(s).

SECTION 1 - Call #1 | SECTION 2 - Call #8 | SECTION 3 - Call #9 | SECTION 4 - Call #12

Instructions for the Policy Year Call for Catastrophe Experience – Call #15 can be found on the Financial Call Package section of our Pennsylvania and Delaware websites. To do so, go to www.pcrb.com, click on **Data Reporting**, then click on **Financial Data Reporting** and select a Financial Call year from the drop-down menu. This will lead you to the **Financial Call Package**, where the instructions are listed.

VII. Pennsylvania Schedule W

Beginning with Call Year 2010, the FDRA (for calls valued as of December 31, 2018, and prior) and FDM (for calls valued as of December 1, 2019, and subsequent) will include the **Pennsylvania Schedule W and Schedule W – Coal**. The submissions provided must be consistent with previous years' reports. For Pennsylvania Schedule W, the application includes the following parts:

- Part A-1 and Part A-5

Schedule W – Coal includes the following parts:

- Part A-2, Part A-3, and Part A-4

Once the above pages are submitted, the application will automatically make all reported data pages available to the Bureau and the Pennsylvania Insurance Department. As a result, there is no need for two separate submissions of these parts.

Instructions for the Pennsylvania Schedule W Constraints affecting Unpaid Claims Estimates Submissions, Schedule W and Schedule W – Coal can be found on the Financial Call Package section of our Pennsylvania website. To view these instructions, go to www.pcrb.com, click on **Data Reporting**, then click on **Financial Data Reporting** and select a Financial Call year from the drop-down menu. This will lead you to the **Financial Call Package**, where the instructions are listed.

Pennsylvania Schedule W Constraints affecting Unpaid Claims Estimates Submissions

Pennsylvania Schedule W Constraints affecting Unpaid Claims Estimates Submissions (Constraints) should discuss any constraints that may have had a substantive impact on any unpaid claims estimate presented in your Schedule W.

Note please provide this information in a PDF document named “constraints.pdf”. Include in the document the Company or Group Name, NAIC Number, and the Name and Company Title of the Person who completed the document.

This document MUST be submitted using FDM. To submit this document, click on the **Attachments** button at the top of the Call list, click on **Choose File**, select and **upload** your document file.

Carriers who have written business for no more than one policy year (from 2010 and subsequent) and have not written any deductible policies during that period are exempt from submitting a completed Constraints document.

FDM will automatically make the provided document available to the Bureau, Pennsylvania Insurance Department and the Coal Mine Compensation Rating Bureau of Pennsylvania.

A. Part A-1 and Part A-5

Parts A-1 and Part A-5 collect calendar year data. Although Parts A-1 and A-5 are identical in layout, each part collects different coverages on a calendar year basis. This requires the user to input data into Parts A-1 and A-5 of Schedule W. Carriers should complete these sections in accordance with the Schedule W instructions.

B. Schedule W Review

Schedule W is subject to review by the Pennsylvania Insurance Department and the Bureau. For the user’s convenience, the application contains one set of Schedule W edits that will be viewed by both entities. Carriers will only need to respond to one set of failed edits within the application for each submission. However, both entities may generate separate, additional edits based on the reasonableness of the data that are not contained within the application. This may require an additional response by the carrier to that single entity.

Various data fields contained within Schedule W reconcile to their counterparts on the Bureau Calls. Comparison edits will run when editing Schedule W and the Bureau Calls to ensure all Schedule W fields reconcile with their counterparts. The edits are contained within both sections so that if a change is made to Schedule W, it will alert the user to carry over the changes to the Bureau Calls and vice versa. Accordingly, the user may address the Schedule W and Call comparison edit failures when submitting the Calls and/or when submitting the Schedule W. Keep in mind, responses provided to the comparison edit failures of these submissions are viewable by the Pennsylvania Insurance

Department

For additional information regarding responding to failed edits, please refer to Section 3, Item X.

C. Schedule W – Coal

As noted above in Section 3, item VII, Schedule W – Coal includes Part A-2, A-3, and A-4. The data collection forms for these parts are like the forms used for Schedule W. As such, data entry for the parts included in Schedule W – Coal should be carried out in the same manner as it is for Schedule W.

D. Schedule W – Coal Review

Although any review of the Schedule W – Coal data will be the responsibility of the Pennsylvania Insurance Department and/or the Coal Mine Compensation Rating Bureau of Pennsylvania, edits for the Schedule W – Coal edits will be similar to the Schedule W edits for comparable parts.

VIII. Statutory Page 14

A Statutory Page 14 entry is required for a carrier or each carrier in a carrier group. The template will automatically calculate a carrier group grand total that will be used for reconciliation purposes throughout the application.

A. Layout

The Statutory Page 14 layout resembles the hard copy version contained within the Statutory Page 14. Here is an excerpt of the Statutory Page 14 included with the application and shown similarly on the template:

The user should enter the values that appear on the company's Statutory Page 14 Line 16, Workers Compensation. When reporting on a group basis, the user should enter the Statutory Page 14 data for all the individual companies associated with your group, regardless of state. If a carrier has no experience with one carrier, then the user should enter zeros for that carrier.

Note since a hardcopy of Statutory Page 14 is no longer required with the Call submissions, Statutory Page 14 values will be verified against the Bureau Premium Call and A.M. Best Publications.

IX. Running the Edits Contained within FDM

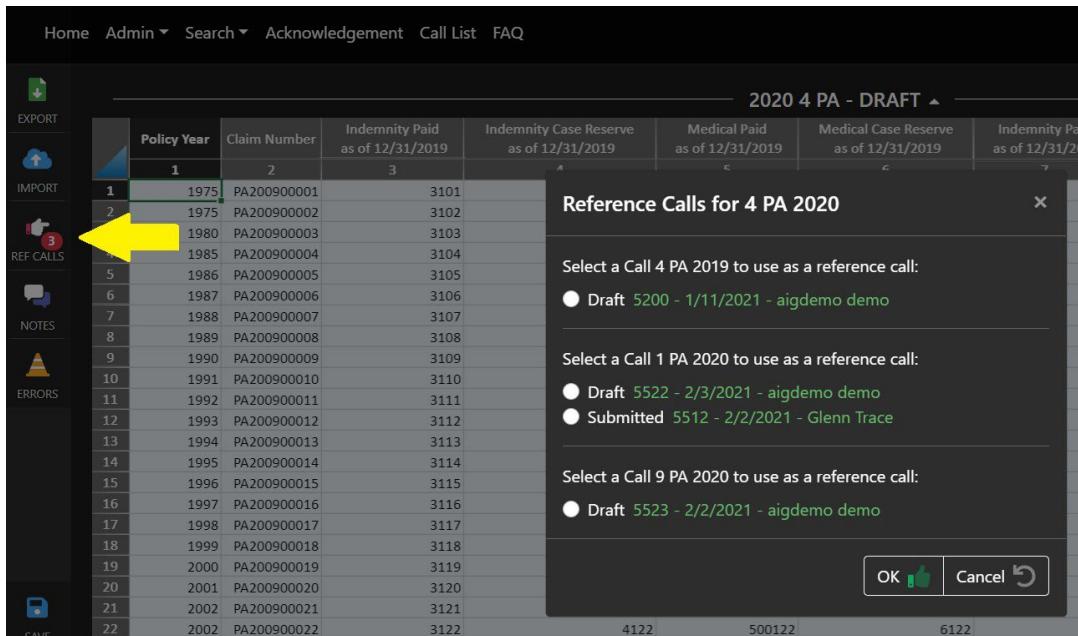
(Refer to Section One – General Application Instruction, VIII. Menu Items, A. Call Submissions, 1. Navigation in a Call on FDM, d. Run Edits, for additional detail.)

One of the features of FDM is that it allows the user to run all edits on the Calls and the Schedule W prior to submission. The user is provided an opportunity to resolve errors and/or explain any data discrepancies/anomalies that exist in each submission.

Note all calls are subject to additional editing by the Bureau and Pennsylvania Insurance Department staff. The additional Actuarial edits do NOT conform to rigid criteria and therefore cannot be included within FDM. Generally, these edits identify unusual data reporting patterns and will require further investigation or verification by the carrier.

Edits can be run on **Saved** and **Submitted** Calls as many times as necessary. The user can also run edits on any combination of the Calls. Once the user clicks on the *Validate* button, the edits run through the system and any errors will populate in the *Errors tab*.

By default, the application will choose the most recent Submitted Call over a Saved Call. If no Submitted Call exists, FDM will default to the Saved Call. If the user wishes to change the default Calls, they must click on the *Ref Calls* button on the lefthand side. There they can change the reference call as necessary. See the example below:



The screenshot shows the FDM application interface. On the left, there is a sidebar with icons for EXPORT, IMPORT, REF CALLS (which has a yellow arrow pointing to it), NOTES, and ERRORS. The main area displays a table for '2020 4 PA - DRAFT' with columns for Policy Year, Claim Number, Indemnity Paid as of 12/31/2019, Indemnity Case Reserve as of 12/31/2019, Medical Paid as of 12/31/2019, Medical Case Reserve as of 12/31/2019, and Indemnity Paid as of 12/31/2020. The table contains 22 rows of data. To the right of the table, a modal dialog box titled 'Reference Calls for 4 PA 2020' is open. It contains three sections: 'Select a Call 4 PA 2019 to use as a reference call:', 'Select a Call 1 PA 2020 to use as a reference call:', and 'Select a Call 9 PA 2020 to use as a reference call:'. Each section has a list of options with radio buttons. The 'Draft 5200 - 1/11/2021 - aigdemo demo' option is selected in the first section. The 'OK' button is at the bottom right of the dialog.

The user can click on the radio button next to the version of the Call they wish to use for the comparative edits. Once the user has made their decision(s), the user can click on the Ok button as shown above.

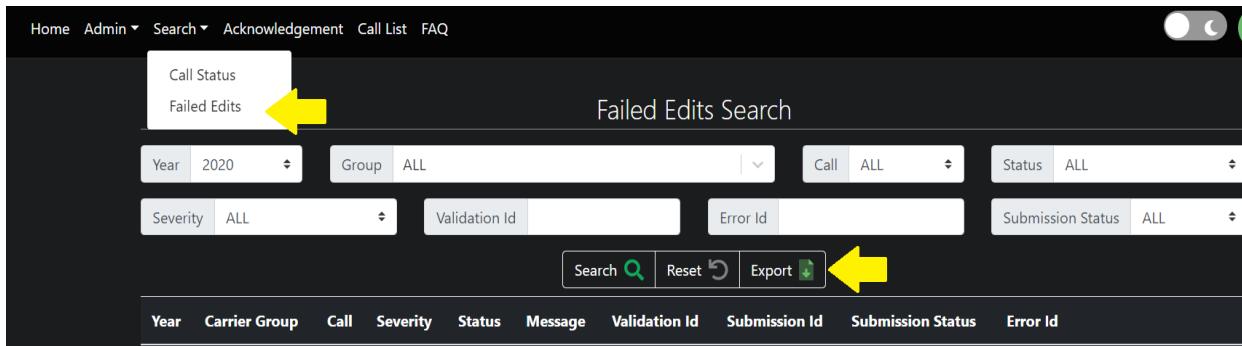
Before running the edits, users should complete and save all their required Calls because many of the Call edits are a function of another Call's entries.

If the user runs the edits prior to having all the Calls saved, the application will indicate that the Call is not available instead of displaying the version it is using for comparative purposes.

If the user wishes to proceed editing without the other Calls being available, they can click on the **OK** button. If the user decides not to proceed, they should close the window by clicking the **Cancel** button.

Once the application performs all the edits, the user must click on the Errors link on the left of the Call for the edit results. If the Call does not pass all FDM edits, then the application will return a Failed Edit List. The listing is segregated by type of edit. The user should scroll down to review the entire list of failed edits.

In order to print out the edits, navigate to the search tab at the top left of the application and select failed edits. From that window, fill out the necessary information to view a list of the edits. After this list is selected, the export button will allow you to save the failed edits. See the example below:



The screenshot shows a dark-themed application window titled 'Failed Edits Search'. At the top, there is a navigation bar with links: Home, Admin, Search, Acknowledgement, Call List, and FAQ. Below the navigation bar, there is a search form with the following fields: 'Call Status' (radio buttons for 'Call Status' and 'Failed Edits', with 'Failed Edits' highlighted by a yellow arrow), 'Year' (dropdown set to '2020'), 'Group' (dropdown set to 'ALL'), 'Call' (dropdown set to 'ALL'), 'Status' (dropdown set to 'ALL'), 'Severity' (dropdown set to 'ALL'), 'Validation Id' (text input field), 'Error Id' (text input field), and 'Submission Status' (dropdown set to 'ALL'). At the bottom of the search form, there are three buttons: 'Search' with a magnifying glass icon, 'Reset' with a circular arrow icon, and 'Export' with a downward arrow icon (highlighted by a yellow arrow). Below the search form, there is a table header with columns: Year, Carrier Group, Call, Severity, Status, Message, Validation Id, Submission Id, Submission Status, and Error Id.

To close the edits, simply click the Errors button on the left of the failed edit list. The Notes button allows the user to attach a note to a Call that can be viewed by the Bureaus or Department. This feature is discussed below in Section X, Items A and B.

This *Failed Edit List*, combined with the ability to immediately correct the items on the *Failed Edit List*, is an important attribute of this application. The ability to edit the data prior to submitting will provide carriers with an effective and efficient method of improving the quality of data submissions. For some carriers, reviewing the Failed Edit List may initially be time-consuming, but the benefit will quickly outweigh the time spent if additional resubmissions and interactions between the carriers and the Bureaus were necessary.

X. Responding to Failed Edits

The user should respond to failed edits through FDM only. This can be done through the **Errors** section of FDM.

The **Errors** section responses should be made during the following periods:

- At the time of submission
- After submissions but before official Bureau criticism
- After Bureau criticism.

Bureau Criticisms

After receipt of a carrier's submission, the Bureau will edit the carrier's data. The Bureau will review all notes sent in the Error Response section accompanying each error during the editing process. If the submitted **Errors** do not address all failed edits or anomalies discovered when running edits, the Bureau will notify the carrier by email to the carrier appointed contact person.

The results will also be posted in FDM application. The **Errors** feature allows the user to immediately see if a criticism has been issued. If a criticism exists, it will be listed under the Errors tab.

Below is an example of how to view the criticism submitted from the Bureaus.

ERRORS	
Search	
Severity	Status
✓ Warning	✓ Unresolved
✓ Requires Response	✓ Accepted
✓ Action Required	✓ Rejected
✓ Criticism	
✓ Requires Admin	
✓ Priority	

The user should review all criticism received from the Bureau. Next, the user should make the necessary corrections to the data and resubmit the Call and/or send an explanation to the Bureau through either the application when resubmitting, or by electronic mail when not resubmitting.

Please note that the provisions of the FDIP are applicable and are specific regarding responses that are found to be incomplete. Copies of all criticisms will continue to be emailed to the carrier's Designated Contact Person.

XI. Troubleshooting

If at any time the application does not return the intended result, the user should click on the Refresh button located on the internet browser toolbar.

If the user experiences any problems with the application that they cannot resolve, please contact the Bureaus at [\(215\) 568-2371](tel:(215)568-2371).

Section Four – Edit Listing

I. Calls Subject to the FDIP

With FDM, all Calls and forms are subject to the provisions of the Financial Data Incentive Program (FDIP) except for Schedule W – Coal. For Calls subject to the FDIP, a complete list of edit descriptions by Call and state are available within the FDIP.

II. Schedule W – Coal

A complete listing of Schedule W – Coal edits are available in FDM. While edits will be available within FDM for the Schedule W – Coal document, review of that data will be the responsibility of the Pennsylvania Insurance Department and/or the Coal Mine Compensation Rating Bureau of Pennsylvania (CMCRB). Carriers should contact the Bureau and/or the CMCRB for any additional information regarding edits or the editing process of this document.