

MWCIA Manage USR User Guide

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1. Introduction

Manage USR allows member carriers to view and manage the Unit Statistical Report (USR) data they have reported to the MWCIA. Members can:

- Search for USRs, claims, import files, USR submissions and USR errors.
- Create, update, validate, and submit USR data, including corrections and replacements.
- Import, validate and submit USR files created on other systems.
- Create USR files for record-keeping or storage in other systems.
- Access a variety of reports, including Notice of Fines Invoices, Policy Verification, USR Expected and Overdue USR reports, in several different formats.

2. Web Membership and Security

Access to Manage USR is provided through MWCIA's Web Membership system. The Web Membership system allows insurance carriers and agents to manage their user accounts for MWCIA web products, such as Manage USR.

2.1. Types of Web Membership Accounts

Web Membership includes different user account types for insurance carriers.

To learn more about registering for or managing your Web Membership user accounts and profile, please see the Web Membership User Guide.

The following types of carrier user accounts are available in Web Membership:

- **Product User:** A Product User is any individual who has been assigned access to the Web Membership system. A product user may have access to one or more products, like Manage USR. If the Product User belongs to a carrier group with multiple carriers, then the Product User may be assigned access to the data for only some of the carriers in the group.
- **Product Administrator:** A Product Administrator has authority to maintain user account information for a particular product or set of products only. He can create new user accounts or manage product access for existing user accounts. If the Product Administrator belongs to a carrier group with multiple carriers, then the Product Administrator may be assigned to manage access for only some of the carriers in the group.
- **Group Administrator:** A primary Group Administrator is required for each carrier group. The Group Administrator has authority to maintain all user accounts within the carrier group. The Group Administrator may create Product Users and Product Administrators as well as secondary Group Administrators. To become a primary Group Administrator, an individual must complete a Group Administrator Web Membership Application Form and

be approved by the MWCIA. For more information regarding Web Membership registration and the application form, please see the Web Membership User Guide.

2.2. Manage USR Access

Your Web Membership Group Administrator has the authority to grant access to Manage USR. Access to Manage USR allows you to view USRs; search for USRs; create a WCSTAT file; view submissions; and view import files, for any carriers to which you have been assigned access. You may also create and revise USRs; import USRs; validate USRs; submit USRs and delete rejected, failed or unsubmitted USRs for your carriers.

2.3. Logging In

To open Manage USR, you must first log in to Web Membership with a valid username and password. Once you log in to Web Membership, the system will display a list of products to which you have access. Click the Manage USR product link to access Manage USR.

When first opening Manage USR, the initial window that displays is the Search window. A menu bar at the left of the window provides access to available functions, such as Search, New, Import, Process Status, My List, Reports and FAQ. Your username is displayed in the upper right corner of the window.

2.4. Logging Out

When you have finished working in Manage USR, please click the Sign Out option on the left menu bar to return to the Web Membership User Products window. From here you can access another product, if needed, or click the Web Membership Log Out link at the left of the screen to log out of Web Membership.

2.5. Timing Out

If your Manage USR session remains inactive for too long, you will be logged out and will need to log in again. If you were in the middle of creating or revising a USR, any changes you made since last saving will be lost. Similarly, if you use Web Membership to access Manage USR and do not return to use any Web Membership function for an extended period of time, you will be logged out of Web Membership. In this case, you may continue to use Manage USR for as long as you like, unless that session also becomes inactive.

3. General Information

3.1. USR Data Format

Manage USR uses the standards for electronic unit statistical submission provided in the Workers' Compensation Insurance Organizations (WCIO) Data Specifications Manual, under Workers' Compensation Statistical Reporting Specifications (WCSTAT).

Additionally, post-submission error reports in Manage USR are available in WCIO Workers' Compensation Criticism Information (WCCRIT) format, and certain reports are available in WCIO Workers' Compensation Control Listings (WCCNTL) format.

Data specifications and additional information on these data formats can be found at www.wcio.org.

3.2. Validation and Submission

Manage USR provides you with the means to validate your USR data prior to submission to MWCIA. Only valid USR data may be submitted to MWCIA. Most of the time, if a USR passes Manage USR validation, it will also be accepted by MWCIA.

Manage USR also offers near real-time submission results whenever possible. Large submission files or requests will be processed offline overnight. Depending upon the size of submission and/or if MWCIA review is needed, results of your submission may be available within minutes, the same day, or as soon as offline processing or MWCIA review is completed.

3.3. USR Statuses

The status of a USR in Manage USR controls what you can do with a USR.

USR Statuses		
Accepted		USR has been Accepted by MWCIA. USR may be viewed, printed or added to a WCSTAT file. USR may be used to create a correction or subsequent USR as applicable.
Accepted With Warnings	With	USR has been Accepted With Warnings by MWCIA. USR may be viewed, printed or added to a WCSTAT file. USR error report may be viewed or printed. USR may be used to create a correction or subsequent USR as applicable.
Rejected		USR has been Rejected by MWCIA. USR may be viewed, printed or added to a WCSTAT file. USR may be deleted or used to create a replacement USR.
Failed		USR has been Failed by MWCIA, and may require manual processing. USR may be viewed, printed or added to a WCSTAT file. USR may be deleted. USR error report may be viewed or printed.
Submitted		USR has been submitted to MWCIA. USR may be viewed, printed or added to a WCSTAT file.
Unsubmitted		USR has not been submitted to MWCIA. USR may be viewed, printed or added to a WCSTAT file. USR may be revised or validated and submitted as needed.
Pending		USR is currently being processed by MWCIA. USR may be viewed, printed or added to a WCSTAT file.

USR Statuses	
Pre-Delinquent	USR is not yet received, and is on the Policy Verification (14-Month or Pre-Delinquent) report. No actions apply to this record.
Due	USR is not yet received, and is on the Expected USRs (18-Month or Due) report. USR may be created, but no other actions apply to this record.
Delinquent	USR is not yet received, and is on the Overdue USRs (21-Month or Delinquent) report. USR may be created, but no other actions apply to this record.

3.4. Basic Navigation

When first opening Manage USR, the initial window that displays is the Search window. Your username and carrier are displayed in the upper right corner of the window. Next to your username are a Notifications icon and a Process Status icon. You may click on the Notifications icon to see real time updates for any MUSR submissions processed recently. You may click on the Process Status icon to see the status of any offline processing requests. Clicking on the items listed in the Notifications and Process Status icon windows will bring you to the item in question.

A menu bar at the left of the window provides access to available functions, such as Search, New, Import, Process Status, My List, Reports and FAQ.

Menu Bar Options	
Search	Click Search in the left menu bar, or click the Search window tabs, to see various search options
General Search	Search for USRs using a variety of criteria.
Search by Claim	Search for a specific claim.
Search Submission	Search for a USR submission.
Error Search	Search for Accepted With Warning, Rejected or Failed USRs.
New	Create a new 01/00 USR.
Import	Import a WCSTAT file or search and view import history.
Process Status	Click Process Status to see various options for viewing the status of submissions and requests that were performed offline.
Offline Validation	See results for Offline Validation requests.
Offline Submission	See results for Offline Submission requests.
Offline Export	See results for Offline Export requests.
My List	See and work with USRs that you have added to My List.
Reports	Access USR reports.
FAQ	See answers to commonly asked questions.

4. Search

To perform a search for USRs, claims or submissions, click on Search in the left menu bar and select your desired search type, and enter or select your desired search criteria. You can also select the search type by clicking on the different tabs at the top of the Search window. If you have already completed a search on this tab during your current login session, the prior search criteria will still be listed. You may reset or modify these criteria.

Once your search criteria have been entered, click the Search button.

4.1. Search Results

When a search is successfully completed, the search results are displayed in the search results grid located on the lower half of the window, beneath the search button. You can navigate through the results (page forward and backward, move to the first/last page) as needed. If you navigate away from a particular Search tab, your most recent search results for the tab will be retained.

4.1.1. Search Result Group Actions

At the top of the search results grid are a variety of group action buttons, indicating actions you may choose to take on one or multiple rows of your search results. Each row of the search results has a checkbox in the leftmost column. You may check (or uncheck) to select rows on which to apply the group actions. Click the drop-down in the checkbox column heading in order to check all, uncheck all, or check only the rows on the current page of search results.

The actual group action buttons that you see will depend on the type of search and the specific search results displayed. For example, if only Rejected status USRs are displayed, the Current View action button will not appear. If the group action button is displayed, but is not valid for the specific USR(s) selected, Manage USR will notify you that it is not a valid action. When searching for submissions, group actions refer to the USR(s) within the submissions listed in the search results.

The group action buttons above the search results grid may include some or all of the following:

Search Result Actions	
View USR	View the USR(s) selected. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Current View	View Current View USR(s) for the USR(s) selected. Applicable to most current Accepted or Accepted With Warnings USR(s) only.
Print USR	Print the USR(s) selected. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.

Search Result Actions	
Print Current View	Print the Current View USR(s) for the USR(s) selected. Applicable to most current Accepted or Accepted With Warnings USR(s) only.
Add to My List	Adds the USR(s) or submissions selected to My List. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
WCSTAT File	Create an XML or flat WCSTAT file from the USR(s) or submissions selected. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Error Report	View the post-submission error report(s) for the USR(s) or submissions selected, in PDF, CSV, Excel or WCCRIT flat file or XML format. Applicable to Failed, Rejected and Accepted With Warnings USR(s) only.
Validate	Validate the USR(s) selected. Applicable to Unsubmitted USR(s) only.
Validation Report	View the pre-submission validation report(s) for the USR(s) selected, in PDF, CSV or Excel format. Applicable to Unsubmitted, validated USR(s) only.
Submit	Submit the USR(s) selected. Applicable to Unsubmitted, valid USR(s) only.
Print Search Results	View a printable list of search results in PDF and CSV format.

4.1.2. Search Result Row Actions

Each row of the search results also has an action drop-down in the rightmost Action column. You may select one of the actions listed in the drop-down to perform that action on that single row.

The row actions available will vary based on the attributes of the specific row, such as whether it is a USR or a submission, the USR status, etc. The actions available in the drop down may include some or all of the following:

Search Result Row Actions	
View USR	View the USR. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Current View	View Current View USR. Applicable to most current Accepted or Accepted With Warnings USR(s) only.
Print USR	Print the USR. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Print Current View	Print the Current View USR. Applicable to most current Accepted or Accepted With Warnings USRs only.

Search Result Row Actions	
Add to My List	Adds the USR or submission to My List. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
WCSTAT File	Create an XML or flat WCSTAT file from the USR or submission. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Error Report	View the post-submission error report(s) for the USR or submission, in PDF, CSV, Excel or WCCRIT flat file or XML format. Applicable to Failed, Rejected and Accepted With Warnings USR(s) only.
Validate	Validate the USR. Applicable to Unsubmitted USR(s) only.
Validation Report	View the pre-submission validation report for the USR, in PDF, CSV or Excel format. Applicable to Unsubmitted, validated USR(s) only.
Submit	Submit the USR. Applicable to Unsubmitted, valid USR(s) only.
Delete	Delete the USR. Applicable to Unsubmitted, Failed and Rejected USRs only.
Create Delinquent	Create the USR. Applicable to Due and Delinquent USR(s) only.
View USR Detail	View the USR(s) that make up the submission. Applicable to submission search results only.

4.1.3. Search Unsuccessful

Manage USR will notify you if one of the following situations occur:

- There are too many search results to display. If the search criteria result in too many rows in the result set, then the system will not show the results. Enter additional search criteria to reduce the number of search results.
- The criteria entered are invalid. If you have provided invalid or insufficient search criteria, then the system will notify you accordingly. Adjust the search criteria as necessary.

5. New USRs

To manually create a new USR, with report level 01 and correction level 00, select New in the left menu bar. The window that appears is the Manage USR window, displaying a blank USR form in edit mode, with tabs for Header, Exposure and Loss information. The Header tab is open by default. For a new USR, the carrier, policy number and effective date must be entered on the Header tab before you can Save or navigate to any other tab. When you navigate to another tab, the data on the tab you are on will automatically be saved.

When data entering information into a new USR, there will be both drop-down fields and data entry fields. In general, you can either type or use your mouse to select a value in the drop-down fields. Pressing the Tab key will move you to the next field, or you can use your mouse to navigate to the desired field.

5.1. New USR Actions

Across the top of the Manage USR window, there are several action buttons displayed. The actions available at the top of this window vary depending on whether you are in edit mode or view mode. See the section on View USR for more information on actions available in view mode.

The actions available in edit mode include the following:

New USR Actions	
Save	Save the USR, and remain in editing mode.
Save & Close	Save the USR and either return to the Search window, or remain on the USR in view mode. You must return to view mode or the Search screen to submit the USR.
Close	Close the USR without saving.
Validate	Validate the USR.

5.2. New USR - Exposure Tab

The Exposure tab provides the fields for entering exposure amounts for the USR. The information you enter will be automatically saved when you navigate away from the Exposure tab but you may save your work at any time by clicking the Save button on the Exposure tab.

The split period information is displayed on the left side of the Exposure tab. Multiple splits will be summarized here. Highlight the split to see the exposures associated with that split.

For a new USR, split period 0 and associated dates are entered by default. You may enter the Experience Modification and the Subject Premium and Modified Premium will be automatically calculated as exposures are entered. To add a new split period, click the +Split button. To delete a split period, click the Delete button.

Exposure information is separated into Subject to the Mod, Not Subject to the Mod and Non Standard sub-tabs. The Premium amount is automatically calculated when an Amount and Manual Rate is entered, but you may enter a Premium amount as well. To add a new exposure row on the current sub-tab, either click the +Exposure button or press Enter after entering the premium amount in the current row. To delete an exposure, click the X at the end of the exposure row.

As you enter exposures, Manage USR does preliminary field validation, and displays those results in a color-coded indicator next to the applicable row. Move your mouse over the indicator to see further information.

At the bottom of the Exposure tab are Exposure Totals. The Calculate button will be available to automatically calculate the totals based on the exposures you have entered.

5.3. New USR - Loss Tab

The Loss tab provides the fields for entering losses into the USR.

To add a claim, click the Add button on the Loss tab. The fields to enter your claim information will display. The loss will save automatically when you press enter on the final field or if you navigate away from the Loss tab. You can also click one of the Save buttons to save your work at any time: Save will save the loss while remaining in edit mode; Save & Close will save the loss and leave edit mode; and Save & New will save the loss and add a new loss for you to begin entering values. To delete a loss, click the Delete button.

As you add claims to the Loss tab, the claims will be summarized in a Claims list on the left side of the tab. You may search for a claim using the search text box at the top of the list. Highlight any claim to see or make changes to the details of that claim. You can also delete a claim by clicking the X next to it in the Claims list.

As you enter losses, Manage USR does preliminary field validation, and displays those results in a color-coded indicator next to the applicable row in the Claims list. Move your mouse over the indicator to see further information.

At the bottom of the Loss tab are Loss Totals. The Calculate button will be available to automatically calculate the totals based on the losses you have entered.

6. View USRs

To view a USR, select View USR from the group action buttons or row action drop-down on the search results grid. Or, if you are creating or editing a USR, select Save & Back to View from the Save & Close drop-down. The window that appears is the View USR window with tabs to display Header, Exposure, Loss, Errors or Status History information. The Header tab is open by default. You may use the tabs to navigate to the USR Exposure, Loss, Errors or Status History as needed. The USR link data will remain across the top of the View USR window regardless of the tab you are on.

If the USR is Unsubmitted and has been validated, the validation results are displayed in an Error Summary area on the right side of the View USR window. The tabs that are displayed for a specific USR are dependent on the type and attributes of the USR. For example, an Unsubmitted USR will not have an Errors tab, and an Exposure correction will not have a Loss tab.

If you have selected multiple USRs to view, you may navigate among them by using the arrows at the upper right corner of the View USR window.

6.1. View USR - Exposure Tab

The Exposure tab displays the exposures that exist on the USR. The split period information is displayed on the left side of the Exposure tab. Multiple splits will be summarized here. Highlight the split to see the exposures associated with that split.

Exposure information for each split is separated into Subject to the Mod, Not Subject to the Mod and Non Standard sub-tabs. Click on each sub-tab to see the applicable values.

6.2. View USR – Loss Tab

The Loss tab displays the losses that exist on the USR. To expand the details of each claim, click the arrow at the far left of that claim. You may filter or sort each column in the Loss tab by clicking on the Filter icon or on the column heading.

6.3. View USR Actions

Across the top of the View USR window, there are a variety of action buttons displayed. The action buttons that you see will vary based on the attributes of USR you are viewing. The actions available may include some or all of the following:

View USR Actions	
Add to My List	Adds the USR to My List. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Back	Navigate back to previous screen. Always applicable.
Print	Print the USR. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Error Report	View the post-submission error report(s) for the USR, in PDF, CSV, Excel, or WCCRIT flat file or XML format. Applicable to Failed, Rejected and Accepted With Warnings USR(s) only.
WCSTAT File	Create an XML or flat WCSTAT file from the USR or submission. Applicable to all status USR(s) except Pre-Delinquent, Due or Delinquent.
Correct	Create a correction report for the USR. Applicable to Accepted and Accepted With Warning USR(s) only. The correction options that appear will vary based on the type of USR.
Subsequent	Create a subsequent report for the USR. Applicable to most current, Accepted or Accepted With Warning USR(s) only.
Revise	Make changes to the USR. Applicable to Unsubmitted USR(s) only.
Replace	Replace the Rejected USR. Applicable to Rejected USR(s) only.

View USR Actions	
Validate	Validate the USR. Applicable to Unsubmitted USR(s) only.
Validation Report	View the pre-submission validation report for the USR in PDF, CSV or Excel format. Applicable to Unsubmitted, validated USR(s) only.
Submit	Submit the USR. Applicable to Unsubmitted, valid USR(s) only.
Delete	Delete the USR. Applicable to Unsubmitted, Failed and Rejected USRs only.

6.4. View USR Actions – Correct a USR

You can create a correction USR for a USR by clicking the Correct action button while viewing the USR you would like to correct, and selecting the appropriate correction type. The correction type options you see will vary based on the type of USR you are correcting. Only Accepted and Accepted With Warnings USRs can be corrected.

Once you have chosen the correction type, the correction USR is created and opened in edit mode, with the necessary fields pre-filled (such as link data and correction type), and the appropriate tab displayed for the correction type you've selected. The Exposure and Loss tabs will display only if appropriate to the correction type you have chosen. In general, you may only edit those fields which apply to your correction type. For example, for Totals corrections, only Totals fields are editable. There are action buttons across the top of the window, similar to a New USR, including Save, Save & Close and Validate.

6.4.1. Correction USR - Exposure Tab

The Exposure tab provides the fields for updating exposure amounts for the USR when entering Exposure or Multiple corrections. The Exposure tab also appears when entering Totals corrections, but only Totals are editable. The information you enter will be automatically saved when you navigate away from the Exposure tab but you may save your work at any time by clicking the Save button on the Exposure tab.

The split period information is displayed on the left side of the Exposure tab. Multiple splits will be summarized here. Click to select the split, in order to see and edit the exposures associated with that split. For correction USRs, the Exposure tab displays 'P' and 'R' records for all exposure records on the USR being corrected, but only the 'R' records may be edited.

In the split you have selected, you can edit the Experience Modification, and the Subject Premium and Modified Premium will be automatically calculated as exposures are edited. To add a new split period, click the +Split button. To delete the split period, click the Delete button.

Exposure information is separated into Subject to the Mod, Not Subject to the Mod and Non Standard sub-tabs. The Premium amount is automatically calculated when an Amount and Manual Rate is entered or updated, but you may enter a Premium amount as well. To add a new exposure row on the current sub-tab, either click the +Exposure button or press Enter after

entering the premium amount in the current row. To delete an exposure, click the X at the end of the exposure row.

As you enter or update exposures, Manage USR does preliminary field validation, and displays those results in a color-coded indicator next to the applicable row. Move your mouse over the indicator to see further information.

At the bottom of the Exposure tab are Exposure Totals, for you to manually correct the totals as needed, based on your corrected exposure values.

6.4.2. Correction USR - Loss Tab

The Loss tab provides the fields for updating losses for the USR when entering Loss, Multiple or Aggravated Inequity corrections. The Loss tab also appears when entering totals corrections, but only Totals are editable. Claims are summarized in a list; to expand the details of each claim, click the arrow at the far left of that claim. You may filter or sort each column in the Loss tab by clicking on the Filter icon or on the column heading. For correction USRs, the Loss tab displays 'P' and 'R' records for all claims on the USR being corrected, but only the 'R' records may be edited.

Click the row action drop-down next to the record you would like to edit and select View/Edit. The claim details open up in edit mode. The P and R records for the USR are summarized in a Claims list on the left side of the Loss tab. You may search for another claim record using the search text box at the top of the list. Click any claim record to select and see or make changes to the details of that claim. You can also delete a claim by clicking the X next to it in the Claims list. Only R records may be edited or deleted.

To add a claim, click the Add button on the Loss tab. The fields to enter your claim information will display. The loss will save automatically when you press enter on the final field or if you navigate away from the Loss tab. You can also click one of the Save buttons to save your work at any time: Save will save the loss while remaining in edit mode; Save & Close will save the loss and leave edit mode; and Save & New will save the loss and add a new loss for you to begin entering values. To delete a loss, click the Delete button.

As you enter losses, Manage USR does preliminary field validation, and displays those results in a color-coded indicator next to the applicable row in the Claims list. Move your mouse over the indicator to see further information.

At the bottom of the Loss tab are Loss Totals for you to manually correct as needed, based on your corrected loss values.

6.5. View USR Actions – Create a Subsequent USR

You can create a subsequent USR by clicking the Subsequent action button while viewing the USR for which you would like to create the subsequent. Subsequent is an available action only for most current Accepted and Accepted With Warnings USRs.

Upon clicking Subsequent, the subsequent USR is created and opened in edit mode, with the necessary fields pre-filled (such as link data) with the Loss tab displayed by default. Subsequent

USRs only have a Loss tab. There are action buttons across the top of the window, similar to a New USR, including Save, Save & Close and Validate.

6.5.1. Subsequent USR - Loss Tab

The Loss tab provides the fields for updating losses on the subsequent USR, and displays with 'P' and 'R' records for any open claims on the previous report. Only 'R' records may be edited.

Claims are summarized in a list; to expand the details of each claim, click the arrow at the far left of that claim. You may filter or sort each column in the Loss tab by clicking on the Filter icon or on the column heading. For subsequent USRs, the Loss tab displays 'P' and 'R' records for all claims on the USR being corrected, but only the 'R' records may be edited.

Click the row action drop-down next to the record you would like to edit and select View/Edit. The claim details open up in edit mode. The P and R records for the USR are summarized in a Claims list on the left side of the Loss tab. You may search for another claim record using the search text box at the top of the list. Click to select any claim record, to see or make changes to the details of that claim. You can also delete a claim by clicking the X next to it in the Claims list. Only R records may be edited or deleted.

To add a claim, click the Add button on the Loss tab. The fields to enter your claim information will display. The loss will save automatically when you press enter on the final field or if you navigate away from the Loss tab. You can also click one of the Save buttons to save your work at any time: Save will save the loss while remaining in edit mode; Save & Close will save the loss and leave edit mode; and Save & New will save the loss and add a new loss for you to begin entering values. To delete a loss, click the Delete button.

As you enter and update losses, Manage USR does preliminary field validation, and displays those results in a color-coded indicator next to the applicable row in the Claims list. Move your mouse over the indicator to see further information.

At the bottom of the Loss tab are Loss Totals for you to manually change as needed, based on your updated loss values.

6.6. View USR Actions - Revise an Unsubmitted USR

Any Unsubmitted USR may be revised. To revise an Unsubmitted USR, click the Revise action button while viewing the USR you would like to revise. Only Unsubmitted USRs can be revised.

Once you have clicked Revise, the USR is opened in edit mode, with the Header tab opened by default. You may navigate to the Exposure and Loss tabs as applicable to revise, add and delete information as needed. There are action buttons across the top of the window, similar to a New USR, including Save, Save & Close and Validate.

For Unsubmitted USRs that originated via import file, all fields, with the exception of correction type, are editable. For USRs that originated in MUSR, link data fields are editable only for report/correction level 01/00. Additionally, for USRs that originated in MUSR, 'P' records are not editable.

6.7. View USR Actions - Replace a Rejected USR

Any Rejected USR may be replaced. To replace a Rejected USR, click the Replace action button while viewing the USR you would like to replace. Only Rejected USRs can be revised.

Once you have clicked Replace, a copy of the USR is opened in edit mode, with the Header tab opened by default. You may navigate to the Exposure and Loss tabs as applicable to revise, add and delete information as needed. There are action buttons across the top of the window, similar to a New USR, including Save, Save & Close and Validate.

For Rejected USRs that originated via import file, all fields on the Replacement USR, with the exception of correction type, are editable. For USRs that originated in MUSR, link data fields on the Replacement USR are editable only for report/correction level 01/00. Additionally, for USRs that originated in MUSR, 'P' records on the Replacement USR are not editable.

6.8. View USR Actions - Delete a Rejected, Failed or Unsubmitted USR

Any Rejected, Failed or Unsubmitted USR may be deleted. To delete a Rejected, Failed or Unsubmitted USR, click the Delete action button while viewing the USR you would like to delete OR click the row action drop-down and select Delete on the USR row in search results. Only Rejected, Failed and Unsubmitted USRs can be deleted, one at a time.

For Rejected and Failed USRs, once you have clicked Delete, you will need to select a delete reason from the drop-down. You may also select Other, and enter in your own reason. Unsubmitted USRs do not require a delete reason. Once deleted, the USR will no longer appear in Manage USR.

Unsubmitted USRs that have not been included in My List, submitted or edited recently will be deleted automatically by the system. Manage USR will email you a list of Aging USRs, approximately two weeks prior to deleting any unsubmitted USRs.

7. Validate

Manage USR provides you with the means to validate your USR data prior to submission to MWCIA. Some validation takes place automatically upon entering or revising USR data. Additional validation occurs when you choose to Validate. Any Unsubmitted USR may be validated and only valid USR data may be submitted to MWCIA. Most of the time, if a USR passes Manage USR validation, it will also be accepted by MWCIA.

7.1. Validate a USR

You may click Validate when viewing the USR, or from the row action drop-down in Search Results. If you are viewing the USR, the validation results appear in an Error Summary on the right hand side of your screen. If you have selected Validate from the row action drop-down in Search Results, a color-coded icon next to the applicable row will indicate your validation results. Move your mouse over the indicator to see further information.

7.2. Validate Multiple USRs

You may also select multiple USRs to validate by checking each row in Search Results and clicking the Validate group action button. Depending on the number of USRs you have selected, Manage USR will either complete the validation while you wait or indicate the validation will take place offline. A color-coded icon next to the applicable rows will indicate validation results.

7.3. Validation Results

Once a USR has been validated, you may see validation result details by viewing the validation report. Click the down-arrow next to the Validation Report button when viewing the USR, and select your desired validation report format.

From the Search Results screen, you can view the validation report by moving your mouse over the Validation Report row action drop-down in Search Results to select your desired validation report format. You may also select multiple USRs for which to view validation reports by checking each row in Search Results, clicking the down-arrow next to the Validation Report group action button and selecting your desired validation report format. Validation reports are available in PDF, CSV or Excel format.

If the validation report indicates errors in the USR(s), you may revise the USR data as needed, save and immediately revalidate the USR. If a USR has no errors or warnings, or has only warnings, it is considered valid and may be submitted. Manage USR will confirm that you wish to submit any USRs with warnings.

If your validation request is being completed offline, you will receive notification when the validation is complete. The status and results of offline processing are available via the Process Status menu option.

8. Submit

Manage USR also offers near real-time submission results whenever possible. Large submission files or requests will be processed offline overnight. Depending upon the size of submission and/or if MWCIA review is needed, results of your submission may be available within minutes, the same day, or as soon as offline processing or MWCIA review is completed. Once a USR is validated and found to have no errors, it is considered valid and may be submitted to MWCIA. Only Unsubmitted USRs may be submitted.

8.1. Submit a USR

You may click Submit when viewing the USR, or from the row action drop-down in Search Results. Status of the USR will change to Pending until a response to the submission is received from MWCIA.

8.2. Submit Multiple USRs

You may also select multiple USRs to submit by checking each row in Search Results and clicking the Submit group action button. Depending on the number of USRs you have selected, Manage USR will either complete the submission while you wait or indicate the submission will take place

offline. The status of the USRs will change to Pending until a response to the submission is received from MWCIA.

8.3. Submission Results

Once a USR has been submitted, and Manage USR has received submission results from MWCIA, you will see the status change and a color-coded indicator next to the applicable row in Search Results. Move your mouse over the indicator to see further information.

For USRs with a status of Accepted With Warnings or Rejected, you can also see submission result details by viewing the post-submission error report. While viewing the USR, click the down-arrow next to the Error Report button, and select your desired error report format.

From the Search Results screen, you can view the error report by moving your mouse over the Error Report row action drop-down in Search Results to select your desired error report format. You may also select multiple USRs for which to view error reports by checking each row in Search Results, clicking the down-error next to the Error Report group action button, and selecting your desired error report format. Error reports are available in PDF, CSV, Excel and WCCRIT XML and flat file format.

If the USR has been rejected, the error report will indicate the specific errors in the USR(s) which must be resolved. You may choose to Replace, or Delete and then recreate the USR as needed. If a USR has only warnings with a status of Accepted With Warnings, it is considered to be accepted and no further action is required.

If your submission request is being completed offline, you will receive notification when the submission is complete. The status and results of offline processing are available via the Process Status menu option.

8.4. Submission History

Manage USR provides submission history for all submissions, whether submitted through Manage USR or another medium. You can use Submission Search to find a submission at any time.

9. Import

Manage USR allows you to import WCSTAT files, either flat file or XML, created on another system. The file must adhere to current WCSTAT standards.

Click on Import in the left menu bar to open the Import window, where you can upload WCSTAT files as well as search for previous import files. Click the Select File icon in the Upload New File section on the right side of the window to browse to your WCSTAT file location. Once found, click Open.

Two import options are available: Import and Import/Submit.

9.1. Import a WCSTAT File

Once your WCSTAT file is selected, click the Import button to import your file only. Depending on the size of the file, the import will be completed immediately, or Manage USR will notify you that the request must be completed offline. Once the import is complete, you may search for, view and work with the USRs in Manage USR.

When importing a file, certain file-level validations are performed. If your WCSTAT file does not pass these validations, the import will fail and you will be notified accordingly. However, complete USR validation and submission are not performed; the individual USRs must still be validated and submitted.

9.2. Import and Submit a WCSTAT File

To import and submit your WCSTAT file in the same step, click on Import/Submit once your file is selected. Depending on the size of the file, the import/submission will be completed immediately, or Manage USR will notify you that the request must be completed offline.

The Import/Submit option will import and automatically validate the USRs on the file. All of the USRs on the file that are valid will automatically be submitted to MWCIA for processing. USRs that are not valid will not be submitted, and will need to be manually revised, revalidated and submitted. Manage USR will notify you of USRs that are not submitted.

9.3. Import Search Results

The Import window automatically shows you a list of recently imported WCSTAT files with the most recent files at the top. If you would like to search for a particular file or set of files, you can specify search criteria and then click on the Search button. The search results will be displayed in the lower half of the tab.

In the search results grid, there will be one row for each import file that satisfies the search criteria. Each row of the search results has an action drop-down in the rightmost Action column. You may select one of the actions listed in the drop-down to perform that action on that single row.

Import Search Result Row Actions	
View Imported USRs	View a list of the USR(s) on the import file.
View Original Import File	View the Original Import File window, to see the records on the original file in a viewer.
Download Original File	Download a copy of the original import file.

9.3.1. View Imported USRs

To view a list of the USRs included in the import file, click View Imported USRs in the row action drop-down. This will open the Imported USRs window, which shows general information about the import file and also displays a list of the USRs included on the import file. You may view and work with the USRs from this list.

9.4. View Original Import File

Click View Original Import File in the row action drop-down button to see the records included in the original import file, in a record viewer. The viewer shows each record on the file, and enables

you to click to see the details of each record in an easy-to-read format. The USR data displayed will not show any changes made to the USRs once imported; only the original file data.

9.5. FTP

You can also FTP WCSTAT files directly to Manage USR. Once sent, the files will appear on the Import screen for you to view and work with, just like files you import using Manage USR. Please see the Web Membership User Guide for more information on FTP setup.

10. Process Status

To ensure robust system performance, Manage USR processes large requests offline. Offline processing means that the request is held until system resources become available. In the meantime, you are allowed to work on other activities in Manage USR. Offline processing generally occurs when a user validates, submits, or creates a WCSTAT file for a large number of USRs at once. Manage USR will let you know your request will be processed offline, and will notify you via email when the offline processing is complete.

The status and results of offline processing are available via the Process Status menu option. You may view offline process status for validation, submission, or export to WCSTAT requests.

10.1. Offline Validation

To see the status and results of your offline validation requests, click the Process Status menu option on the left menu bar and select Offline Validation. Each offline validation request is listed here. When the validation request has been completed, a completion date will be displayed. You may click the row action drop-down button to download the MUSR validation results for the request.

10.2. Offline Submission

To see the status and results of your offline submission requests, click the Process Status menu option on the left menu bar and select Offline Submission. Each offline submission request is listed here. When the submission request has been completed, a completion date will be displayed. You may click the row action drop-down button to download the MUSR validation results for the submission.

10.3. Offline Export

To see the status and results of your offline export requests, click the Process Status menu option on the left menu bar and select Offline Export. Each offline export request is listed here. When the export request has been completed, a completion date will be displayed. You may click the row action drop-down button to download the export file created for the request.

11. Create WCSTAT File

The system allows you to create a WCSTAT file of USRs. Any USR can be selected to create a WCSTAT file.

On any Search Results window or on My List, select the USRs that you wish to export into a WCSTAT file. Click on the WCSTAT File button, and select your desired file format.

If the number of USRs selected for the WCSTAT is small, then the system creates the file while you wait. You can view or save the resulting file.

If the number of USRs selected is large, then the system may create the file offline. When the file is ready, the system will notify you and you may access the file from the Process Status - Offline Export menu option.

12. My List

My List is a list of remembered USRs that you can use to save and easily find USRs that you are currently working on or that will need to be worked on in future.

You can select one or more individual USRs, either from search results or when viewing USR details, and add them to My List. You can also choose to add all the USRs in a submission to My List. USRs can be removed from My List at any time.

13. Reports

Manage USR provides access to a number of reports you can use to help identify late or missing USRs, pay any fines or manage your USR data. These reports are available for viewing, printing or saving, in a variety of formats.

To view a report, select the carrier(s) and the month, then click on the icon for the report and format you would like. For those reports which are refreshed monthly, Manage USR contains the current month's reports as well as up to three months' historical reports.

13.1. Late USRs Report

The Late USRs report shows all late USRs for the most current USR data up to the 10th report. It includes all missing reports, rejected USRs and unedited reports. The Late USRs report is refreshed monthly and is available in PDF, Excel and CSV format.

Note: If the unit is rejected it will be removed from our system after 90 days.

13.2. Carrier Fines Unpaid

The Carrier Fines Unpaid – Notice of Fines Invoice report shows delinquent USRs that are subject to fines each month. All missing USRs, including rejected USRs that are removed from our system, that are not received by MWCIA within 30 days after issuance of the Overdue USRs Report are subject to a \$100 fine payable monthly. These delinquent USRs will continue to incur a \$100 fine for each additional 30-day period that they remain outstanding.

The Carrier Fines Unpaid report is refreshed monthly and is available in PDF, Excel and CSV format. In addition to viewing this report in Manage USR, you can also choose to have the PDF version of

this report emailed to you each month after it is refreshed. This ability is managed from your Web Membership profile. For more information on managing email subscriptions, please see the Web Membership User Guide.

13.3. Policy Verification

The Policy Verification report, also known as the Pre-Delinquent or 14-Month report, shows policy identification information for policies with an effective date 14 months prior to the date of the report. This report is intended to assist you in the verification of policy data and identification of USRs due for filing. Any discrepancies or changes to policy information shown should be submitted to MWCIA via the Manage Policy System.

The Policy Verification report is refreshed monthly and is available in PDF, Excel, CSV and WCCNTL format.

13.4. USRs Expected

The USRs Expected report, also known as the Due or 18-Month report, lists all policies with effective dates 18 months prior to the date of report, including any corrections to policy data received from in response to the Policy Verification report. This report serves as a reminder that USRs are due during the 20th month after the policy effective date.

The USRs Expected report is refreshed monthly and is available in PDF, Excel, CSV and WCCNTL format.

13.5. Overdue USRs

The Overdue USRs report, also known as the Delinquent or 21-Month report, lists all USRs not received by the end of the 20th month after the policy effective date, which will be subject to a \$100 fine if not received within the next 30 days. Note: Rejected unit reports will be removed from our system after 90 days, and will not appear on any list. Once they have been removed, they may become finable. If an insured is included on the report that you feel should not have been included because the USR was filed, the policy was cancelled flat, or other reasons, please notify MWCIA prior to the issuance of any fines.

The Overdue USRs report is refreshed monthly and is available in PDF, Excel, CSV and WCCNTL format.

13.6. Fine Notification Schedule

The Fine Notification Schedule is the annual schedule of when MWCIA calculates fines and refreshes monthly reports. The report also notes when USRs are due.

The Fine Notification Schedule report is updated annually and is available in PDF format.

13.7. Top 20 Carrier Edit Report

The Top 20 Carrier Edit report is an on-demand report that will give you a high-level view of the most common post-submission edits received on USRs within a specified date range. To view the

Top 20 Carrier Edit report, you may enter a date range and specify a specific status (Accepted With Warnings or Rejected) and then select either Download PDF or Download XLS.

14. How-Tos

14.1. How to View a USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs.
- Click the View USR button. Or to view a single USR, click View USR in the rightmost Actions column drop-down for that USR. Your USR(s) will open for viewing.

14.2. How to Print a USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs.
- Click the Print USR button above the search results. Or to print a single USR, click Print USR in the rightmost Actions column drop-down for that USR.
- In the pop-up window, choose to open or save the PDF file. You can print the file as needed.

14.3. How to Create a New USR: Report 01, Correction 00

- Click New from the left menu bar. A blank USR window will open.
- Enter your header information. At a minimum, the carrier ID, policy number and policy effective date must be entered to move from the header tab.
- When header fields are completed, click the Exposure tab to enter exposures.
- For the default split 0, enter the experience modification.
- Click on the Subject to the Mod, Not Subject to the Mod and Non Standard tabs to enter exposure information for the default split. Press the enter key in the last field of each row to save and add the next new row, or click the + Exposure button.
- When default split exposures are entered, click the + Split to add a split and repeat steps as needed.

- When all exposures are entered, click the Calculate button in the Totals section to calculate exposure totals.
- Click the Loss tab to enter losses if needed.
- Enter loss fields. When loss fields are complete, click Add or Save & New to add another loss. Or press enter in the last loss field.
- When all losses are entered, click the Calculate button in the Totals section to calculate the loss totals.
- When the USR data entry is complete, click Save to save the USR and remain in edit mode. Or click Save & Close to save the USR and either go back to view mode or back to the search window.

14.4. How to Revise an Unsubmitted USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria, including a status of Unsubmitted, and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. Only Unsubmitted USRs can be revised.
- Click the View USR button. Or to view a single USR, click View USR in the rightmost Actions column drop-down for that USR. Your USR(s) will open for viewing.
- In the View USR window, click Revise. Your USR will open in edit mode.
- Make your desired revisions, then click Save to save the USR and remain in edit mode. Or click Save & Close to save the USR and either go back to view mode or back to the search window.

14.5. How to Create a Subsequent USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search. Choose Yes for the Most Current search criteria drop-down to only display the most current USRs that satisfy your search criteria.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. You may only create a subsequent USR to the most current Accepted and Accepted With Warning USR.
- Click the View USR button. Or to view a single USR, click View USR in the rightmost Actions column drop-down for that USR. Your USR(s) will open for viewing.
- In the View USR window, click Subsequent. The subsequent USR, with the appropriate fields pre-filled, will open in edit mode.

- Make your desired revisions, then click Save to save the USR and remain in edit mode. Or click Save & Close to save the USR and either go back to view mode or back to the search window.

14.6. How to Create a Correction USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. You may only create a correction USR for Accepted and Accepted With Warning USRs.
- Click the View USR button. Or to view a single USR, click View USR in the rightmost Actions column drop-down for that USR. Your USR(s) will open for viewing.
- In the View USR window, click Correct, and select the desired correction type. The correction USR, with the appropriate fields pre-filled, will open in edit mode.
- Make your desired revisions, then click Save to save the USR and remain in edit mode. Or click Save & Close to save the USR and either go back to view mode or back to the search window.

14.7. How to Create a Due or Delinquent USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria, including a status of Due and/or Delinquent and click Search.
- From your search results, click Create Delinquent in the rightmost Actions column drop-down for the desired USR. The desired USR will open in edit mode, with link data fields pre-filled.
- Make your desired revisions, then click Save to save the USR and remain in edit mode. Or click Save & Close to save the USR and either go back to view mode or back to the search window.

14.8. How to Replace a Rejected USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria, including a status of Rejected, and click Search. Only Rejected USRs may be replaced.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs.

- Click the View USR button. Or to view a single USR, click View USR in the rightmost Actions column drop-down for that USR. Your USR(s) will open for viewing.
- In the View USR window, click Replace. The replacement USR, with the appropriate fields pre-filled, will open in edit mode.
- Make your desired revisions, then click Save to save the USR and remain in edit mode. Or click Save & Close to save the USR and either go back to view mode or back to the search window.

14.9. How to Delete a Rejected, Failed or Unsubmitted USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria, including a status of Rejected or Unsubmitted and click Search. Only Rejected, Failed or Unsubmitted USRs may be deleted.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs.
- Click the View USR button. Or to view a single USR, click View USR in the rightmost Actions column drop-down for that USR. Your USR(s) will open for viewing.
- In the View USR window, click Delete. If deleting a Rejected or Failed USR, select/enter a delete reason in the dialog box and click OK. Your USR is deleted and you are returned to your search results. Alternatively, you may click Delete in the rightmost Actions column drop-down for the USR.

14.10. How to Import a WCSTAT File

- Click Import in the left menu bar.
- Under Upload New File, click the Select File icon and browse to your WCSTAT file location; click Open.
- Click Import or Import/Submit. Choosing to Import/Submit will automatically validate and submit any valid USRs. If you choose Import, you will still need to validate and submit the USRs that are imported.

14.11. How to Create a WCSTAT File for Export

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs.

- Click the down arrow next to WCSTAT File button, and select a WCSTAT file format. Or to create a file with a single USR, move your mouse over the WCSTAT File option in the rightmost Actions column drop-down for that USR, and select your file format option.
- In the pop-up window, choose to save or open your WCSTAT file.

14.12. How to Validate a USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. Only Unsubmitted USRs may be validated.
- Click the Validate button. Or to validate a single USR, click Validate in the rightmost Actions column drop-down for that USR, or click to View the USR. Once the USR opens, click the Validate button.
- Review your validation errors, by viewing the validation report. Or, if you are viewing the USR, the validation errors are also listed on the right side of the USR screen.
- Revise your USR to correct any errors.

14.13. How to Correct Inconsistent Split Period Information

- Certain edits indicate the presence of inconsistent split period information (000060, 000155 and 000156). If you have imported a USR that received these edits during validation, follow these steps:
- View the USR and click the Revise button.
- On the Exposure tab for the affected split, click the red asterisk.
- In the dialog box that opens, select the correct date and/or experience mod value, and click OK.

14.14. How to View or Print a Validation Report

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. Validation reports will only exist for Unsubmitted USRs that have been validated and found to have warnings or errors.
- Click the down-arrow next to the Validation Report button above the search results, and select your desired validation report format. Or to view a single USR validation report, move your mouse over Validation Report in the rightmost Actions column drop-down for that USR and select your desired format.

- In the pop-up window in your browser, choose to open or save the error report file. You may print the file as needed.

14.15. How to Submit a USR

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. Only valid Unsubmitted USRs may be submitted.
- Click the Submit button. Or to submit a single USR, click Submit in the rightmost Actions column drop-down for that USR, or click to View the USR. Once the USR opens, click the Submit button.
- Your USR will be submitted to MWCIA. The status will change to Pending until submission results are received from MWCIA.

14.16. How to View or Print a Post-Submission Error Report

- Click Search in the left menu bar and select a search option.
- Enter your search criteria and click Search.
- From your search results, click the checkbox or boxes in the leftmost column to select a USR or USRs. Post-submission error reports will only exist for USRs that are Accepted With Warnings or Rejected.
- Click the down-arrow next to the Error Report button above the search results, and select your desired error report format. Or to view a single USR error report, move your mouse over Error Report in the rightmost Actions column drop-down for that USR, and select your desired format.
- In the pop-up window in your browser, choose to open or save the error report file. You may print the file as needed.

14.17. How to View or Print a Report

- Click Reports in the left menu bar.
- Select a specific carrier in the carrier drop-down if desired.
- Click the icon for the specific report and report format you would like.
- In the pop-up window, choose to save or open your report.

15. Contact Information

If you have questions or concerns about Manage USR not addressed by this guide, please email unitstat@mwcia.org. For questions regarding Web Membership registration, please email WebMembership@mwcia.org. For all other questions, please call the MWCIA at 952-897-1737.