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ACCEDE User Guide

ACKNOWLEDGMENT FORM

Completion of the Acknowledgment Form is required to inform MWCIA which Financial Data Calls will be reported by each Financial Data Reporting Group.

Access the online Acknowledgment Form from the ACCEDE launch site page. An ACCEDE account is not required to access the online Acknowledgment Form. Enter the NCCI Group/Carrier code for your Financial Data Reporting Group in the Carrier Code box. After tabbing to the Carrier Name box, the name of the Financial Data Reporting Group will appear. If reporting Financial Data on group basis, click the checkbox for Group Reporting and list the individual carriers that are included within the Financial Data Reporting Group. Enter the remaining information for the Financial Data Reporting Group and submit the Acknowledgment Form.

You will not have the ability to print until you have successfully submitted the Acknowledgment Form. After you have submitted the Acknowledgment Form, the Submit button will become disabled, and you will only have the option to either Print or Reset the form. If any changes need to be made, you will have to Reset the form and then submit the corrected Acknowledgment Form.

ACCESSING YOUR ACCEDE ACCOUNT

Log into your ACCEDE account by launching ACCEDE online. Enter your username and password on the login screen and then click on the ACCEDE link listed under Product Name. After logging into your account, you will be taken to the Search Calls screen under Manage Calls in ACCEDE.

LOGGING OUT OF ACCEDE

To log out of ACCEDE, click on the Logout link on the top right of the screen. Upon logging out of ACCEDE, you will be directed to the User Products screen in Web Membership. Click on the Log Out link on the User Products screen to log out of Web Membership. Note: If you have been working or have been inactive in ACCEDE for an extended period of time, your Web Membership session may have expired.

EXCEL TEMPLATES

The Primary Ratemaking Calls and the Large Loss Call templates can be downloaded from the Excel Interface screen from the left panel on the Manage Calls screen.

After entering data into the appropriate Excel template, the completed template can be uploaded for the corresponding Call on the Excel Interface screen. Only numeric values without decimals should be entered into the templates. Templates containing alpha or special characters cannot be uploaded. Make sure the completed template file is saved and closed prior to upload.

You can also download the most recent five Report Years of Primary Ratemaking or Large Loss Calls that have been submitted for your Financial Data Reporting Group.

CREATE/COPY CALLS

To access the list of Calls available for creation, choose the Search Calls screen on the left panel in the Manage Calls screen. In the Search Calls screen, select the current Report Year and click on the Search Calls button, and the list of Calls that are available for creation in the current Report Year will be displayed below the Search Results. The list of Calls that are available for creation depends on the latest completed Acknowledgment Form. If the Acknowledgment Form indicates that a Call will not be reported for the current Report Year, then that Call will not be available for creation.

Clicking on the Create link next to one of the Calls listed below the Search Results will create a blank Call for the current Report Year. Uploading a completed Excel template for a Call in the Excel Interface screen will also create a Call for the current year. (The Schedule Rating and Reconciliation Report Calls do not have Excel templates available for upload.)

Another way to create a new Call for the current Report Year is to use the Copy link in the list of available Calls. If a Call was reported in the previous Report Year and the Acknowledgment Form indicates that the same Call will be reported in the current year, then the Copy link can be used to copy the previous Report Year data into a newly created Call for the current Report Year. The Copy link can only be used in the creation of the first version (i.e. Revision number 0) of the current Report Year Call. Click on the Update button to update the Call. Updates to the Call can be saved using the Save button. Clicking the Save & Close or the Close button will bring one back to View mode, and the Update button will have to be clicked again to make additional updates.

CALL STATUS

Upon creating or copying a Call in ACCEDE, a Call is assigned a status of Unvalidated. Validating a Call will change the status of a Call to Validated, and Submitting a Call will change the status of a Call to Submitted.

Calls in Unvalidated or Validated status can be updated or deleted. Calls in Submitted status cannot be updated or deleted.

BULK IN IBNR

In the Primary Ratemaking Calls, the questions on the BULK IN IBNR tab must be answered in order to save changes to the Calls. If a Call is created via the Copy link, the responses from the previous Report Year Call will be copied into the BULK IN IBNR tab for the current Report Year.

UPDATE CALLS

To update cell values in an Unvalidated or Validated Call, use the filters on the Search Call screen to obtain a list of Calls that have been created for the current Report Year. Click on the View link to the right of the appropriate Call. Then click on the Update button to update the Call. Updates to the Call can be saved using the Save button. Clicking the Save & Close or the Close button will bring one back to View mode, and the Update button will have to be clicked again to make additional updates.

Updates can also be uploaded with updated cell values in the Excel templates. Updates for a Call can be uploaded as long as the status of the Call is either Validated or Unvalidated.

LOSS COST MULTIPLIER

The Loss Cost Multiplier (LCM) screen is accessible on the left panel of the Manage Calls screen. The Group Summary displays the Policy Years for which LCM details are expected for the current Report Year. LCM details must be provided for the latest complete policy year if corresponding earned premium has been reported. If a Call has premium reported on a corresponding Policy Year displayed on the LCM screen and that Call has been submitted already, then the LCM for that Policy Year can be viewed but cannot revised. If an LCM needs to be revised and the Financial Call premium data associated with that LCM has already been submitted, contact the Actuarial Department to have the LCM revised.

Each Policy Year will either have an Add or View link next to the Weighted Average LCM column. For a Policy Year that does not have any LCM detail entered, the Add link will allow one to enter all the LCM filings that have been in effect during that Policy Year. For each Policy Year that has premium reported in the Financial Calls, LCM filings must be entered. In the LCM details for a Policy Year, enter the individual carrier code, the effective date of filing, and the percent of business written for the Policy Year. Before saving an update to the LCM Details for a Policy Year, the total percent of business written over all the entries must be 100%.

For Policy Years that already have LCM details stored, the View link can be used to update LCM filings, provided that the associated premium data was not already reported on a submitted Financial Call. After clicking the View link, the Revise button will be available to allow changes to the LCM details. The Revise button will not be available under the LCM details for Policy Years that already have associated premium reported on a submitted Financial Call.

VALIDATION

To validate the Financial Calls, go to the Validate Calls screen on the left panel of the Manage Calls screen. All the Calls that are eligible for validation will be listed on this screen. If Policy Year premium data has been reported in the Financial Calls, yet the LCM associated with the reported Policy Year premium has not been entered, then validation will be prohibited. Click on the Validate Calls button to validate the Calls that have been created.

Upon completion of Call validation, the Correspondence button will be enabled from the Validate Calls screen. Clicking on the Correspondence button will bring one to the Validation Correspondence screen, where all edits resulting from Call validation will appear. The column headings above the list of edits can be used to sort the edits. Edits will have a status of either Open, Pending, Resolved, or Accepted. Upon initial validation, the status of all edits for the current Report Year will be Open. **Carriers must address each edit for the current Report Year before being allowed to submit the data. Stating that the data is correct as reported is NOT a valid explanation to the edit.**

For each edit for which a valid explanation can be provided, expand the edit to enter the explanation and click on the Save Explanation link. Upon saving the explanation, the edit will collapse and the edit status will be changed to Resolved.

If an edit warrants a change to the data reported on the Call, clicking on the Call ID in the Associated Call column will open the Call in update mode and allow the necessary changes to be saved. In many instances, an update in one Call necessitates a corresponding update to another Call. After the updates have been saved to all the affected Calls, return to the Validate Calls screen and re-validate the calls. Any edits that were fixed due to data corrections on the Calls will no longer appear in the Validation Correspondence list. If any edits continue to flag on the

updated Calls, ensure that the data reported on the updated Call is accurate and make sure the previously entered explanations are still applicable. After all edits have been addressed (i.e. there are no edits in Open status), submit the Validated Calls.

SUBMIT CALLS

When the Calls are ready for submission, access the Submit Calls screen from the Manage Calls screen. Calls that have Open edits cannot be submitted, but those Calls will be listed as having Unresolved Error(s) on the Submit Calls screen and will have a disabled checkbox. To address the Open edits, click on the Correspondence button and access the Validation Correspondence screen and search for the edits in the appropriate Report Year. The column heading Status can be used to sort the edits by status. Expand and address each Open edit before returning to the Submit Calls screen. When there are no more edits to address, the Correspondence button will not be displayed on the Submit Calls screen.

Upon selecting the Calls for submission and clicking the Submit Calls button, the user will be directed to the Self-Audit Form. The Self-Audit Form allows the Financial Reporting Group to make sure the components of the data reported on the Primary Ratemaking Calls are accurate. **Completion of the Self-Audit Form is mandatory**. A Review Option must be selected for each question on each tab, and the questions on the Additional Details tab must have responses entered in the Comment box. If Exception is selected as a Review Option response, a comment must be provided to explain the exception. When valid responses have been saved for each question, click on the Continue Submission button to submit the Calls. Upon successful submission of the Calls, a message will display the submitted Call IDs and the screen will revert to the Submit Calls screen. The submitted Calls will not be listed on the Submit Calls screen anymore.

EDIT NOTIFICATIONS

After the current Report Year Calls have been submitted, MWCIA staff will review the Calls and edits for further validation. If MWCIA staff finds that an explanation entered for an edit is unacceptable, an e-mail notification will be sent requesting additional clarification of the edit explanation or further review of the Call data to the Financial Data Reporting Group.

The Financial Data Reporting Group should be able to access the edits that need further review from the Validation Correspondence screen. An edit status of Accepted means that MWCIA staff has found the explanation entered for the edit to be acceptable. If questions from MWCIA staff can be answered with additional details in the edit explanation, provide the additional details in the explanation box of the edit. If further review indicates that corrections are necessary to the submitted Financial Calls, then Call revisions will need to be submitted in ACCEDE.

CALL REVISIONS

Prior to creating Call revisions voluntarily (i.e. without requests from MWCIA), please review the section on Voluntary Resubmissions in Part 10 (FCIP) of the Minnesota Aggregate Financial Data Reporting Guidebook. If the data reported on the Submitted Calls is incorrect, a revision to the incorrect Calls must be created, validated, and submitted. If revisions of the Primary Ratemaking Calls need to be re-submitted, then the Self-Audit Form must be reviewed again prior to submission.

Upon initial creation of the Calls, a Revision number of 0 is assigned. After the original version of a Call (i.e. Revision number 0) has been submitted, corrections to the Call may be created by selecting the submitted Call from the Search Calls screen by clicking on the View button from the search results and clicking on the Create Revision button when the Call detail screen comes up. The Call detail screen for the same Call will appear to refresh but the header will display a Revision number of 1 and a Status of Unvalidated, and the Update button will be enabled as well.

Click on the Update button so that revisions can be entered and saved in the Call data. After the revisions have been saved, the cell values that have changed from a previous revision will be highlighted in yellow, except in the Large Loss Call.

After all necessary Call revisions are saved, re-validate the Calls and return to the Validation Correspondence screen to review the edits for the Report Year in which a revision was created (as described in the VALIDATION section above). There may be some edits in Pending status that must be corrected via an update to the revised Call or a revision to another call in the same Report Year. Explanations cannot be entered for Pending edits, because they must be corrected before the Calls are submitted. For the revised Calls, there will most likely be open edits that were resolved or accepted in prior revisions, but all open edits must be addressed to ensure that the revised Calls are accurate and that explanations are relevant.   Once the Validation Correspondence screen shows that there are no Open or Pending edits under the Report Year for which the Validated Call revisions will be submitted, click on the Submit Call Correspondence button. Submit the Call revisions on the Submit Calls screen and re-visit the Self-Audit form as necessary.

Upon review of edit notifications from MWCIA, corrections to Calls in the previous Report Year may be necessary. Using the Search Calls screen, access the appropriate previous Report Year Call and click on the Create Revision button. Update all other Calls in the previous Report Year that are affected by the corrections, and create revisions for the corresponding Calls in the current Report Year as well. After all Call revisions have been saved due to data corrections, validate the Calls in both the previous and current Report Year. Once validation is complete, address **each edit for the revised Calls in both the previous and current Report Years**, either by providing edit explanations or by updating the data in the Calls. After all the edits have been addressed, click the Submit Call Correspondence button and then submit both the revised previous and current Report Year Calls.