

Application Manager User Guide
Agency and Employer Users

Delaware Compensation Rating Bureau, Inc.
Pennsylvania Compensation Rating Bureau

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A. INTRODUCTION

The Application Manager is the common interface to access products residing in the secure areas of the DCRB/PCRB website via a single user name and password.

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

B. PRIVACY AND SECURITY

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

C. GETTING STARTED

1. Accessing the Website

The recommended and supported web browser to access the Application Manager is Google Chrome. Certain functionalities may not work properly when using alternative browsers.

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

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

2. Registration

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

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

Agent User – This user type is for insurance agents and brokers. Individuals applying to become an **Agency Group Administrator (AGA)** requires approval from the DCRB/PCRB. Agent Users require approval from their Agency Group Administrator.

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

Employer User – This user type is for business owners. Individuals applying to become an **Employer Group Administrator (EGA)** requires approval from the DCRB/PCRB. Employer Users require approval from their Employer Group Administrator.

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

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

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

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

D. PASSWORDS

1. Password Requirements

- Minimum length of 12 characters for non-admin accounts
- Minimum length of 15 characters for admin accounts
- Must contain at least 1 uppercase character
- Must contain at least 1 lowercase character
- Must contain at least 1 numeric character
- Must contain at least 1 special character from @ # \$ % ^ & + ! =
- Cannot contain user name
- Passwords are case sensitive.

2. Reset Password

Users can reset their password by selecting the "Forgot Password" option on the Sign In screen. They will then be asked to provide their username, email address, and CAPTCHA code. A verification code will be sent to the email address associated with their account. This code remains valid for 15 minutes before expiring. Users have three attempts to enter the code; if the third attempt fails, they will be redirected to the Sign In screen. Should the code expire or become invalid due to unsuccessful attempts, users must initiate a new password reset using the "Forgot Password" option. After entering the verification code, users will need to answer a security question to proceed. Upon answering the security question, they will be prompted to create a new password.

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

3. Password Attempts

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

4. Password Expiration

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

E. USER ACCOUNT DEACTIVATION

To ensure the security and efficiency of our system, user accounts that have remained inactive for the past three years will be deactivated. Users will receive an advance email notification before their account is deactivated. To prevent deactivation, users must log in before the date specified in the notice.

If an account has been deactivated, it can be reactivated by contacting Central Support.

F. USER PROFILE

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

The following fields can be modified:

- First Name
- Last Name
- Title
- Phone Number + Ext
- Fax Number
- Email
- Company Name
- Mailing Address
- Mailing City
- Mailing State
- Mailing Zip Code
- Agent NPN (Only for Agent Users)
- PA or DE License Number (Only for Agent Users)
- Receive Email (Only for Administrators) – Check this box to receive admin notifications

Expand the "Update Security Question" section to modify your security question and answer. Choose your preferred security question from the drop-down menu, enter the corresponding answer, and provide your current password. Finally, click Save to apply the changes.

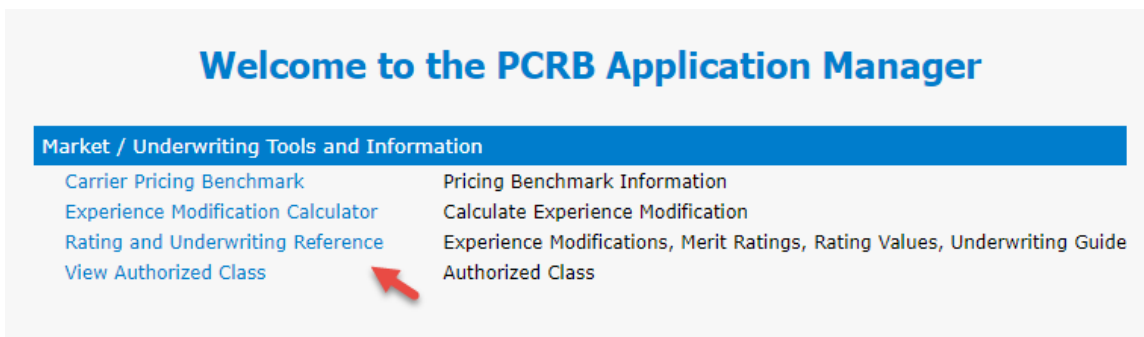
G. MAIN MENU OPTIONS

1. Home

This is the screen presented to the user upon login. The Home screen lists the products that are available to the user within the Application Manager. Alerts such as new

messages or approval requests (Administrators only) are also displayed on the Home screen.

Click on the product name to launch the application.



2. Message Board

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

Click [+] to view details of the announcement.

Message Board		
	Subject	Received
[+]	DCRB/PCRB Website Maintenance	05/02/2019 11:41 AM EST
[+]	DCRB/PCRB Web Site Maintenance	03/11/2019 12:30 PM EST

3. Help Section

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

Click the PDF icon to view the document.

HELP SECTION			
	Description	Size	Date Posted
	Application Login User Guide	0.59 Mb	08/11/2021
	Delaware Insurance Plan Depopulation Listing	0.03 Mb	01/09/2018
	Indemnity Data Manager User Guide	0.67 Mb	08/11/2021

4. Request Status Change (Guest Users Only)

Select **Request Status Change** from the main menu to submit a request to change user type from a Guest User to an Agent User, Carrier Group User, Employer User, Insurance Department User or TPA. Status change requires approval from the group administrator.

The user's access to the website will be temporarily unavailable until the request is approved by the administrator.

5. Application Access Requests (Agent Users and Employer Users)

Select **Application Access Requests** from the main menu to submit a request to the group administrator for access to use a product.

On the Application Access Requests screen, check the box of the product(s) for which the user needs access to and then click the **Request** button.

APPLICATION ACCESS REQUESTS			
Request?	Application Name	Description	Date Requested
<input checked="" type="checkbox"/>	Invoice Online	View Invoices	
<input checked="" type="checkbox"/>	Medical Data Manager	View, Enter and Edit Medical Information	
<input checked="" type="checkbox"/>	Policy Data Manager	View, Enter and Edit Policy Information	
<input type="checkbox"/>	Test Audit Online	Test Audit Statistics - Download	
<input type="checkbox"/>	Unit Data Manager	View, Enter and Edit Unit Stat Information	
<input type="checkbox"/>	WC Data Pro	View, compare and export premium and loss data	
Count: 8			



6. Agent Admin (Agency Group Administrator Only)

The Agency Group Administrator functions are performed via the **Agent Admin** menu. Select an option from the drop-down menu to manage users and permissions.

7. Agency Information (Agent Users Only)

Select **Agency Information** from the main menu to view the physical address of the agency.

8. Employer Admin (Employer Group Administrator Only)

The Employer Group Administrator functions are performed via the **Employer Admin** menu. Select an option from the drop-down menu to manage users and permissions.

9. Employer Information (Employer Users Only)

Select **Employer Information** from the main menu to view the physical address of the business.

H. AGENCY/EMPLOYER GROUP ADMINISTRATORS

A key element of the Application Manager is the establishment of Agency Group Administrators (AGA) and Employer Group Administrators (EGA). The primary role of a group administrator is to manage the users of their group. The group administrator will be

responsible for maintaining all user access privileges to the site and to the products and their data. It is the responsibility of the group administrator to manage their user community. The DCRB/PCRB will communicate all system informational items to the group administrators.

Each agency and employer group may have multiple Administrators assigned to the group. All Administrators will have access to all products available to the group and to all their data.

If an additional or replacement group administrator is needed, contact Central Support for information on how to make those changes.

1. Manage User Requests

When an individual registers (or a Guest User submits a status change) to become an Agent Group user or an Employer Group User, the group administrator will be notified via email of the pending request.




To approve or reject user requests:


- 1) Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu. Alternatively, the group administrator may select the [user request](#) link from the Home screen.

- [There is 1 user request that require your review.](#)

- 2) On the Maintain Users screen, check the box for “Show pending user requests”.

Show pending user requests

MAINTAIN USERS							
		Name	User Name	Type	Active?	Status	Phone Number
		Parker, Peter	spiderman	Employer User		Approval Requested	(123) 456-7890
Count=1							
Page 1 of 1 (1 items) < [1] >							Page size: 10

- 3) Select the  icon to view the user’s profile.
- 4) On the User Profile screen, click the **Approve** button to approve the user or click the **Reject** button to reject the user.

The screenshot shows a web application window titled "Edit Form" with a "User Profile" section. The form contains the following fields and values:

User Name: *	spiderman
Password:	(Re)Assign Password
First Name: *	Peter
Last Name: *	Parker
Title: *	Staff
Phone Number: *	(123) 456-7890
Fax Number:	() - -
Email: *	centralsupport@pcrb.com
Company Name: *	Marvel
Mailing Address: *	1 Marvel Way
Mailing City: *	Orlando
Mailing State: *	FLORIDA
Mailing Zip Code: *	21220
Status:	Approval Requested
User Type:	Employer User
Employer FEIN:	MARVEL (*6789)

At the bottom right of the form is a "Save" button. Below the form is a section titled "Assign Application(s)" with three buttons: "Approve" (with a green checkmark), "Reject" (with a red X and highlighted by a red box), and "Close" (with a grey X).

- 5) Click the **OK** button on the confirmation dialog box displayed.
- 6) Click the **Close** button on the User Profile screen to return to the Maintain Users screen.

2. Manage Application Access

When an Agent Group User or Employer Group User submits a request for access to products, the group administrator will be notified via email of the pending request.

Below is an example of the email:

*From: noreply@pcrb.com
Subject: New Application(s) Request*

Dear Administrator,

A user is requesting access to the following application(s):

- *Delaware Insurance Plan Manager*

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


*Login to the DCRB/PCRB Application Manager to assign the requested applications to the user.
Thank you,
Central Support
(215) 320-4933
centralsupport@pcrb.com*

To approve the application access request:

- 1) Select the application access requests link from the Home screen.

• [There is 1 application access request that require your review.](#)

- 2) On the Application Access Requests screen, click [+] next to the requestor's last name to view the details of the request.

APPLICATION ACCESS REQUESTS					
Last Name	First Name	User Type	Company Name	Email	Phone
 Parker	Peter	Employer User	Marvel	leslava@pcrb.com	(123) 456-7890

Count: 1

- 3) Select the applications that the user will be given access to and then click the **Approve** button or select the applications that the user will not be given access to and then click the **Reject** button.


Select	Application Name	Date Requested
<input checked="" type="checkbox"/>	Delaware Insurance Plan Manager	03/18/2023 @ 04:03 PM EST

Count: 1

Approve Reject

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

To modify a user's application access:

- 1) Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu.
- 2) On the Maintain Users screen, select the  icon to view the user's profile.
- 3) On the User Profile screen, select **Assign Application(s)**.

- 4) Check the **Authorize to Use** product box to grant the user access to the product or uncheck the box to remove their access. Changes made are saved automatically.

Some products can be assigned the “View Only” access which allows the user to access the product in “read only” mode where the data cannot be altered or modified.

The checkbox will be grayed out for products that are assigned to all users by default. The access cannot be modified.

Application Name	Description	Authorized to Use	View Only
Carrier Pricing Benchmark	Pricing Benchmark Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delaware Insurance Plan Manager	View, Enter and Edit Delaware Insurance Plan Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Experience Modification Calculator	Calculate Experience Modification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Industry Reports	View Industry Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rating and Underwriting Reference	Experience Modifications, Merit Ratings, Rating Values, Underwriting Guide	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Authorized Class	Authorized Class	<input checked="" type="checkbox"/>	<input type="checkbox"/>


- 5) Click the **OK** button on the confirmation dialog box displayed.
- 6) Click the **Close** button on the User Profile screen to return to the Maintain Users screen.

3. Remove User Account

It is the responsibility of the group administrator to remove users from their group when necessary. This could occur when someone has left the company or assumed other responsibilities. Failure to do this means that the unauthorized personnel could access the data.


Note: Removing a user does not delete the account, but it removes all access to the group data. The user will be assigned the “Guest User” role.


To remove a user from the group:

- Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu.
- On the Maintain Users screen, select the  icon of the user that will be removed from the group.
- Click the **OK** button on the confirmation dialog box displayed.

4. Reset User Password

To reset a user’s password:

- Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu.
- On the Maintain Users screen, select the  icon of the user whose password needs to be reset.
- On the User Profile screen, click the **(Re) Assign Password** button.

Edit Form	
User Profile ⤴	
User Name: *	spiderman
Password:	(Re)Assign Password 
First Name: *	Peter
Last Name: *	Parker
Title: *	Staff
Phone Number: *	(123) 456-7890
Fax Number:	() - -
Email: *	centralsupport@pcrb.com

Ext:

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

I. SUPPORT

Questions regarding the Application Manager should be directed to the DCRB/PCRB Central Support.

- Phone: 215-320-4933
- Email: centralsupport@pcrb.com or centralsupport@dcrb.com

An initial response to inquiries will be provided by a team member within 48 to 72 hours from date of receipt.