NCRB-NCRF-NCIGA

north carolina
RATE BUREAU
REINSURANCE FACILITY
INSURANCE GUARANTY ASSOCIATION

A guide to getting started with

ManageAR

NCRB's Workers Compensation Online Tool for Processing Assigned Risk Applications

Version 2.5 – last updated on 1 April 2022

North Carolina Rate Bureau
2910 Sumner Boulevard
Raleigh, NC 27616
919-582-1056

If at any time during these procedures you need assistance, you may contact the Information Center at:

Phone: 919-582-1056
E-mail: support@ncrb.org

Contents

Before You Start...

Welcome to the ManageAR™ (pronounced Manage-AY-ARE) web application! ManageAR is an online version of the *North Carolina Workers Compensation Insurance Plan Application for Designation of an Insurance Company* (Acord 135NC). It guides you through the process of completing the application, provides a variety of online tools like EZQuote for quickly estimating premiums, and even checks your applications for errors before submission.

After you complete a 135NC application using ManageAR, your application is instantly routed through the appropriate channels at the North Carolina Rate Bureau (NCRB). You can print completed applications, review past submissions, search your applications, and more.

Online training videos have been created to assist you in using the new features in ManageOwnership application. These are available in the NCRB Online Training Center located here. Should you have any questions regarding these systems, please let us know by calling (919) 582-1056 between the hours of 8:30 am to 5:00 pm Monday through Thursday and 8:00 am to 12:00 pm on Friday, or via email at support@ncrb.org.

By taking a few minutes to review the first few pages of this user guide, you will be prepared to quickly learn how to use this powerful online tool. ManageAR was designed to be user-friendly and easy-to-use, but if you have problems, you can refer to this guide for help.

Now let's get started!

Web Browser Specifications

ManageAR has been tested and certified working for the Chrome browser. Other browser such as IE11, Firefox, Opera, Netscape and MS EDGE are not supported at this time.

You can download the latest version of Chrome free of charge at https://www.google.com/chrome/

Cookies

ManageAR uses **session cookies**[1] to remember important information as you move from page to page within the application. These session cookies reside in your browser's memory only as long as your browser session is active. In other

[1] Many web applications use **standard cookies** – a standard cookie is written to your hard drive and is used to remember you the next time you visit the application's web site. ManageAR uses session cookies, not standard cookies, so no data is written to your hard drive (unless you request to download a file).

words, when you close your web browser after using ManageAR, the session cookie is destroyed, thus protecting any data you entered while using ManageAR.

Unlike some web applications, ManageAR does not write any data to your hard drive using cookies.

Opening New Windows

Some pages in ManageAR open, or spawn, a new browser window when they are accessed. For example, when you view a report, you are spawning a new window. Remember to close the new window whenever you want to exit it and return to where you were in ManageAR.

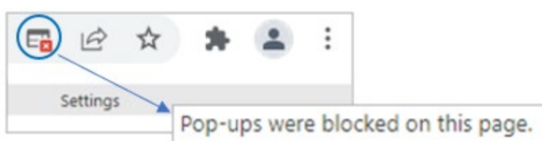
Configuring Your Pop-up Blocker

If you have a pop-up blocker installed, you will need to allow pop-ups from the NCRB Website to properly use ManageAR.

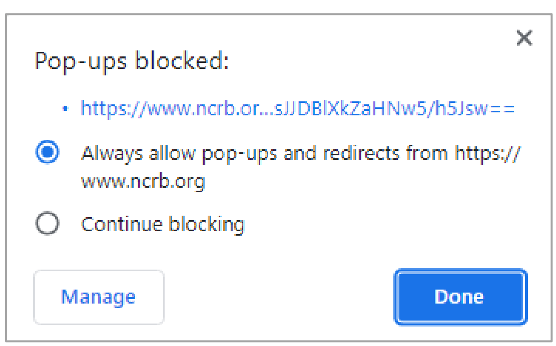
To allow pop-ups from the NCRB Website using Chrome, follow these procedures:

Step 1. On your computer, open **Chrome** .

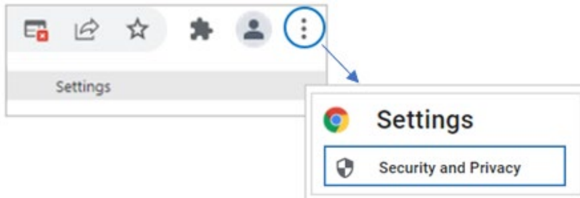
Step 2. If you have already received a **Pop-ups blocked** message as shown below, click on the pop-ups blocked icon to manage pop-ups for the selected page.



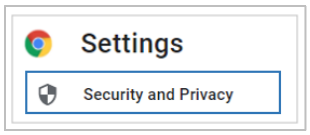
Step 3. In the pop-up message, click the radio button to "*Always allow pop-ups and redirects from https://www.ncrb.org"* and select **Done**.

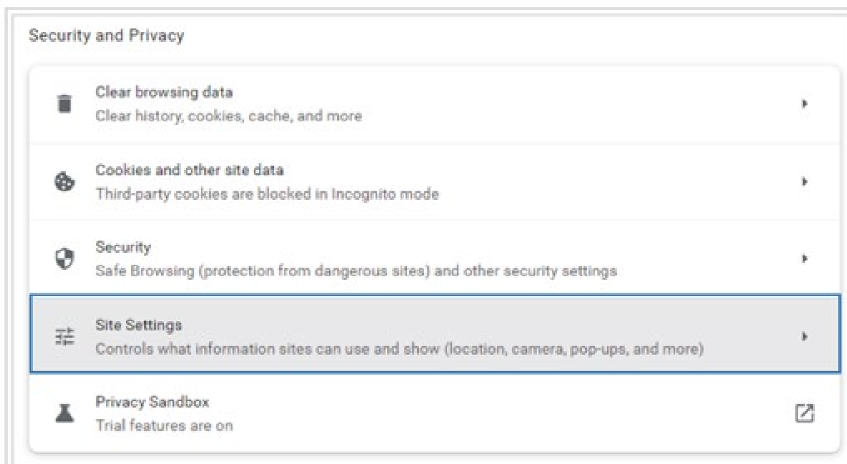


Step 4. Pop-ups can also be updated under browser settings. In the top right of your screen, click **More** ⋮ → **Settings**.



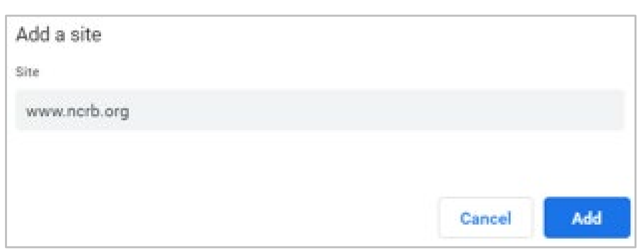
Step 5. Under Settings, click **Security and Privacy** → **Site Settings**.





Step 6. Under **Site Settings**, locate the **Content** section and select **Pop-ups and redirects**.

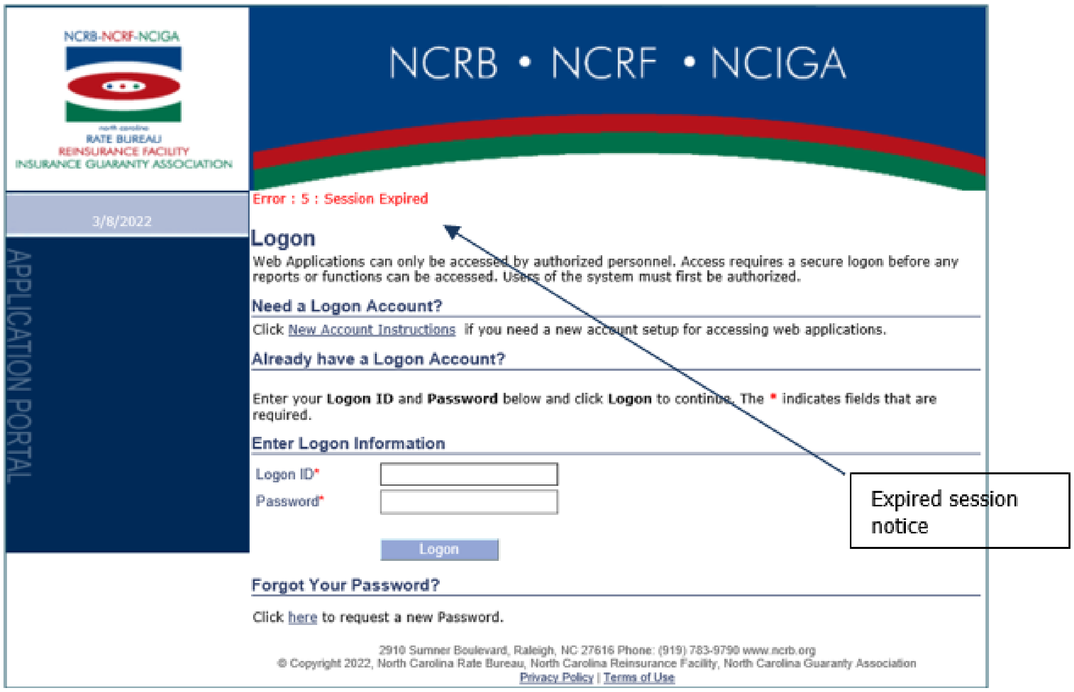
Step 7. Under Customized behaviors, go to 'Allowed to send pop-ups and use redirects' and click the '**Add**' button. Enter the following URL *www.ncrb.org* and click '**Add**'.



Step 8. Confirm URL *www.ncrb.org* has been added and close window to exit **Settings**.

System Timeout

ManageAR times out after it has been inactive for more than twenty minutes. The following message displays, informing you to re-sign into the System.



Accessing ManageAR

Logging in to the Portal

“The Portal” will provide access to all of the secured applications and data on the NCRB, NCRF and NCIGA Web site, so you must log on to the Portal before you can access ManageAR. To log in to the Portal, use the following procedure. (You must use a valid user name and password provided to you by your System Administrator.)

Step 1. On the NCRB Website (http://www.ncrb.org), click the NCRB link. From the NCRB home page, select the Members Services Portal link in the quick access box. The **PORTAL LOGON** page displays.

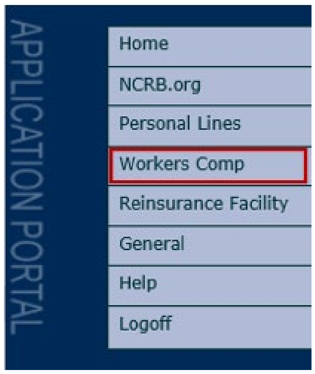
Step 2. Enter your Logon ID and password. Click the **Logon** button. The *PORTAL HOME* page displays.

Note: If you enter an incorrect user name or password, the system will return an error message to inform you of the invalid data. Re-enter your user name and password correctly, and click the Logon button to enter the system.

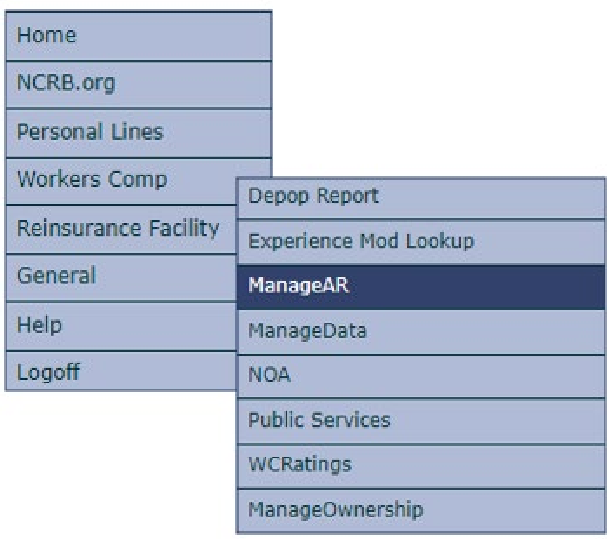
Launching an Application

The Portal is the common place from which all secured applications are accessed on the NCRB, NCRF and NCIGA Website. You will only see applications you have been authorized to access. All of the applications are categorized based upon the business unit that the application represents. To launch an application, follow these procedures:

Step 1. On the left navigation menu, click **Workers Comp**.



Step 2. On the sub-menu, click **ManageAR**. The application page displays.

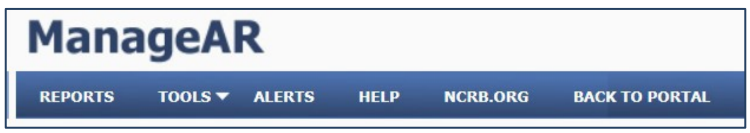


Navigating in ManageAR

Primary Navigation Menus

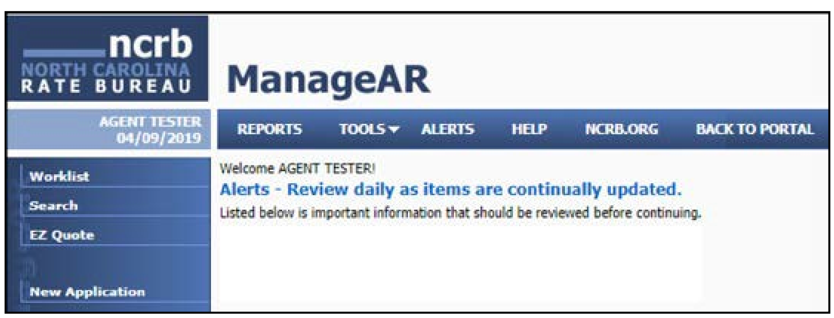
ManageAR features two primary navigation menus: a **top menu** and a **sidebar menu**.

The Top Menu



The **top menu** is customized according to the level of access you were assigned when you were added to the ManageAR user list.

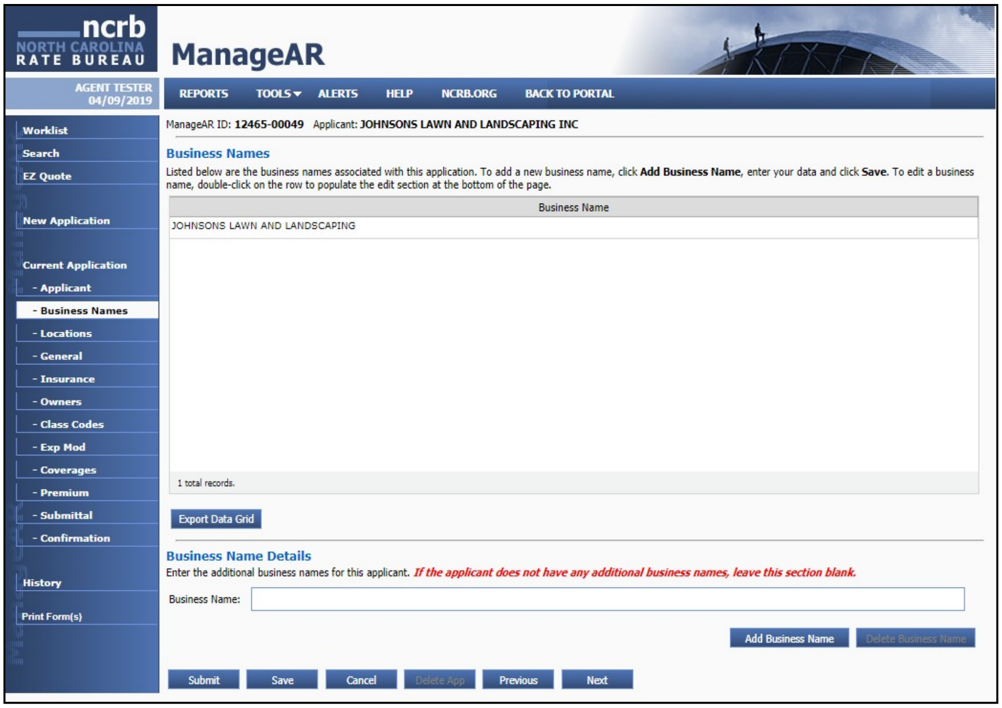
The Sidebar Menu



The sidebar menu is customized depending on where you are within ManageAR. For example, when you first log on, the sidebar menu will show only four items, **Worklist, Search, EZ Quote** and **New Application**.

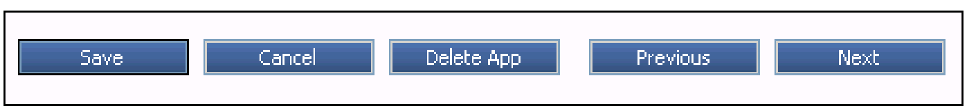
But as you start a new 135NC application, more choices will be available in the sidebar menu. This task-specific menu approach ensures that you will always have the navigation elements you need as you work within ManageAR.

The ManageAR Sidebar Menu changes according to where you are within the application.



Application Menu Buttons

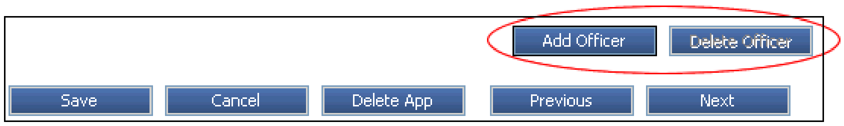
As you fill out an application within ManageAR, additional navigation buttons become available at the bottom of the page.



- **Save** – Checks for errors on the current page and saves the data *without* advancing to the next section of the application. If errors are found, you will see instructions in the appropriate section in **bold red text**. For more information on error checking, see *How to Correct Validation Errors* on page 41.
- **Cancel** – Cancels the current changes and refreshes the current page.
- **Delete** – Deletes the 135NC application you are working with, including any data that has been saved and/or uploaded on previous pages of the application.
- **Previous** – Retains the data on the current page, and then takes you to the previous page of the application. *No error checking is performed when this button is clicked.*
- **Next** – Saves the data on the current page, and then progresses to the next step of the 135NC application. *No error checking is performed when this button is clicked.*

- *Page-specific buttons* – Some pages will display an additional, screen-specific application menu button. For example, on the **Officers** page, the **Add Officer** button allows you to add corporate officers to the application. These screen-specific buttons appear only where appropriate.

Some pages contain application menu buttons that apply to actions associated with that page.



Viewing Existing 135NC Applications

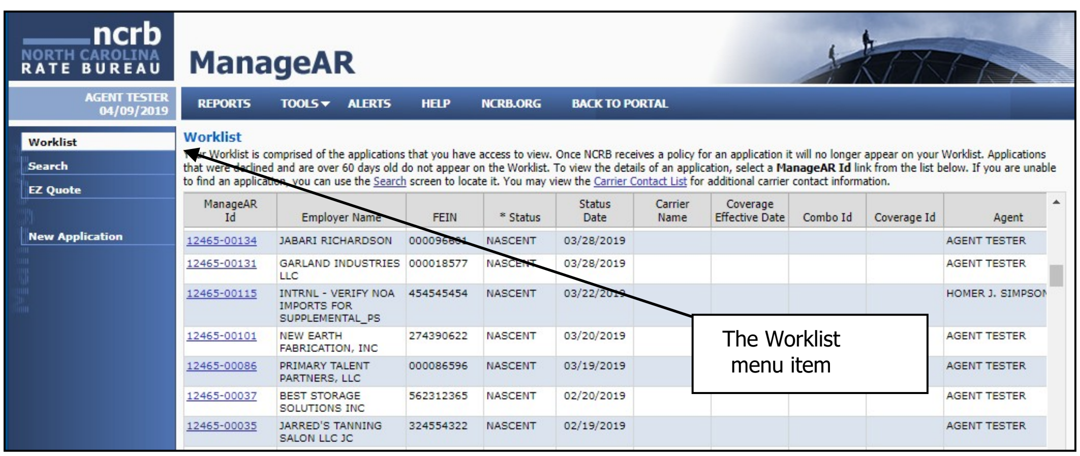
ManageAR offers two methods of accessing your existing 135NC applications. The first is your **Worklist**, which is simply a listing of the applications on which you are working.

The second method is an application **search** feature that allows you to define specific search criteria to locate an application.

Viewing Your Worklist

Step 1. To view all the applications that you are currently working with, click **Worklist**.

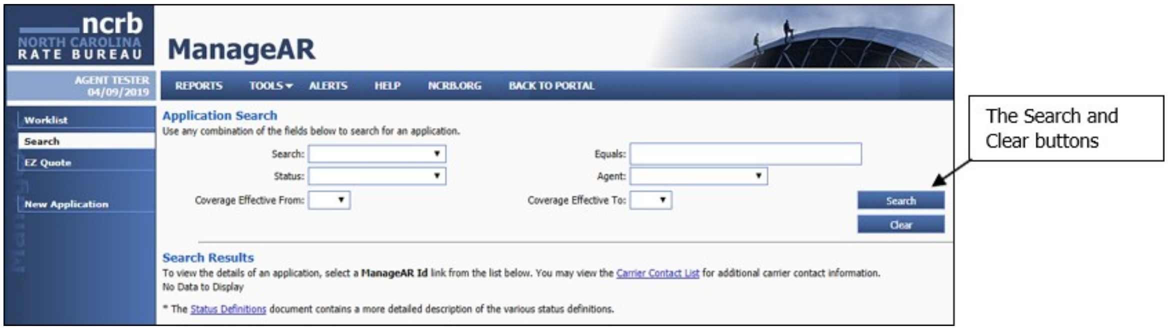
Once NCRB receives a policy, it replaces the application. The application then will no longer appear on your Worklist. Applications that were declined and are over 60 days old also do not appear.



Step 2. To view an application on your Worklist, double-click the row containing the application information, or simply click the application's *ManageAR Id* link.

Searching

The Application Search Screen



To search for a specific 135NC application:

Step 1. On the sidebar menu, click **Search**

Step 2. On the **Application Search** screen, use the dropdown lists and textboxes to define the criteria for your search. You can use any combination of these fields to define your search parameters.

Step 3. Click the **Search** button.

NOTE: When you execute a Search, the filter parameters used are saved. To execute a new search, click the **Clear** button to reset the filter parameters.

Working with Search Results

Search Results

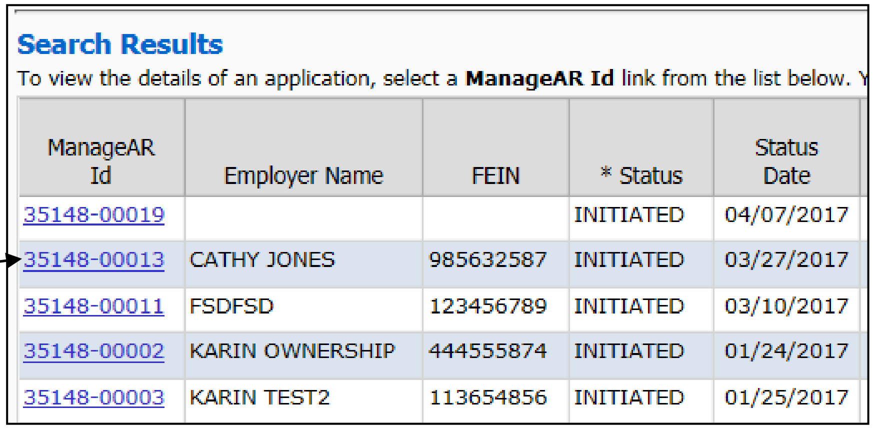
To view the details of an application, select a **ManageAR Id** link from the list below. You may view the Carrier Contact List for additional carrier contact information.

ManageAR Id	Employer Name	FEIN	* Status	Status Date	Carrier Name	Combo Id	Coverage Id	Agent	Coverage Effective Date
35148-00019			INITIATED	04/07/2017				KENNETH MICHAEL	
35148-00013	CATHY JONES	985632587	INITIATED	03/27/2017				KENNETH MICHAEL	
35148-00011	FSDFSD	123456789	INITIATED	03/10/2017				KENNETH MICHAEL	
35148-00002	KARIN OWNERSHIP	444555874	INITIATED	01/24/2017				KENNETH MICHAEL	
35148-00003	KARIN TEST2	113654856	INITIATED	01/25/2017				KENNETH MICHAEL	
35148-00015	KEN JONES	123544897	INITIATED	04/06/2017				KENNETH MICHAEL	

The results of your search are compiled within a grid just below the search criteria section.

- **To sort the search results,** click any of the grid column headings.

To view the details of an application, click the application's ManageAR ID number.



Search Results

To view the details of an application, select a **ManageAR Id** link from the list below. Y

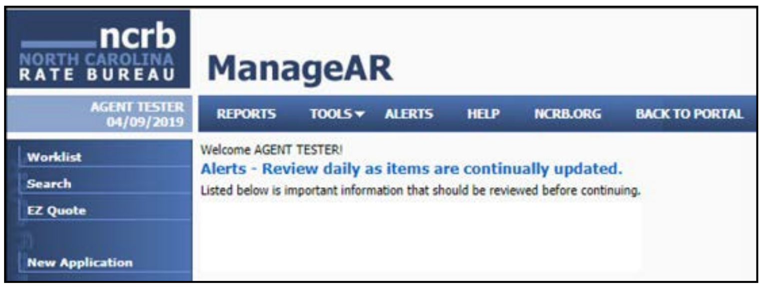
ManageAR Id	Employer Name	FEIN	* Status	Status Date
35148-00019			INITIATED	04/07/2017
35148-00013	CATHY JONES	985632587	INITIATED	03/27/2017
35148-00011	FSDFSD	123456789	INITIATED	03/10/2017
35148-00002	KARIN OWNERSHIP	444555874	INITIATED	01/24/2017
35148-00003	KARIN TEST2	113654856	INITIATED	01/25/2017

- **To view the details of an application,** double-click that application row, or simply click the desired application's *ManageAR Id* number.

Entering a New 135NC Application

Getting Started

Starting a new 135NC Application is a simple and straightforward process.



To start a new application:

Step 1. On the sidebar menu, click **New Application**.

Step 2. Enter the required information on the *Applicant* page. At a minimum, you must complete the Employer Name, Address, City, State, Zip Code, Legal Description, Requested Effective Date and Business Description.

Step 3. Click the **Save** button to save your new application.

Any validation or edit failures will be displayed in **bold red text** at the top of the page. You may choose to correct the edit failures immediately, or you may continue to enter the rest of the application data. You will be required to correct all edit failures before the final submittal to the NC Rate Bureau for processing.

Upon entry of the initial identifying data fields (Applicant page), ManageAR will access eligibility information in NCRB's processing system. If an ineligibility (non-payment of prior premium obligation or non-compliance of an audit), is detected, a notification box will pop-up to alert the agent of the non-compliance. You can choose to stop the application process at that point or you can proceed with completing the remaining application fields and submit it to the NCRB for processing.

The new Compliance feature in ManageAR will conduct a high-level review of our internal database based on the applicant name and Federal Employers Identification Number (FEIN) only. Upon review of the application by NCRB's Assigned Risk staff, a more thorough search will be conducted and may potentially identify an ineligibility ManageAR did not initially recognize.

Since all ineligibilities must be resolved prior to assignment of coverage to an Assigned Risk carrier, the agent or employer must contact the prior carrier to resolve the audit and/or pay the past due premium obligation. If you need contact information for the carrier or need specific information as to what the ineligibility is, we encourage you to contact our Information Center at 919-582-1056 or via e-mail at support@ncrb.org.

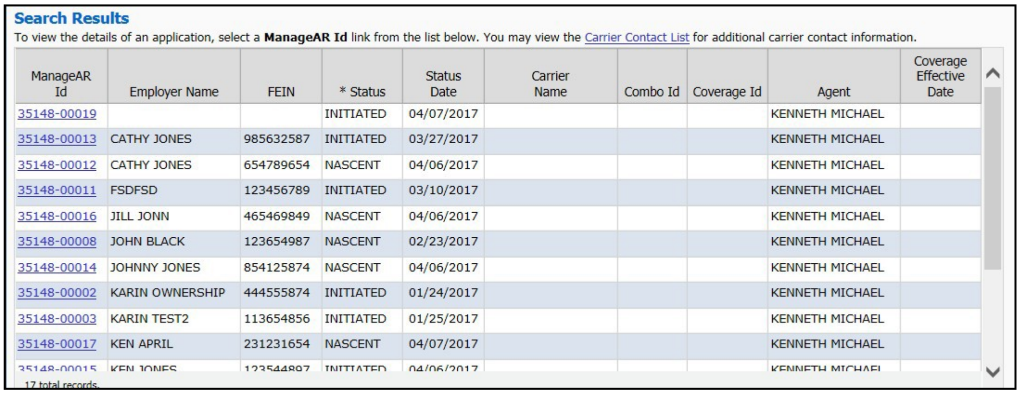
We strongly recommend agents resolve eligibility situations prior to submitting the application to NCRB. However, if the agent chooses to continue the application process in ManageAR, despite an ineligibility existing, once reviewed, the application may be declined. If the employer becomes compliant during the review process, the effective date of coverage will be based on the compliance date, not the initial submission date into ManageAR.

Step 4. To navigate to the next page, click the **Next** button. Follow the instructions on each page to step through the process of filling in the application. For information on using the application navigation buttons to navigate through the application process, see *Application Menu Buttons* on page 11 of this Guide.

You can jump to different sections of the application using the sidebar menu on the left. Before navigating to a different page, you must save your changes on the current page. You are not required to fully complete the application in one sitting – you can save the application and come back to it later, if necessary.

Using the ManageAR Grids

Grids are used throughout ManageAR to display data used in completing the application.



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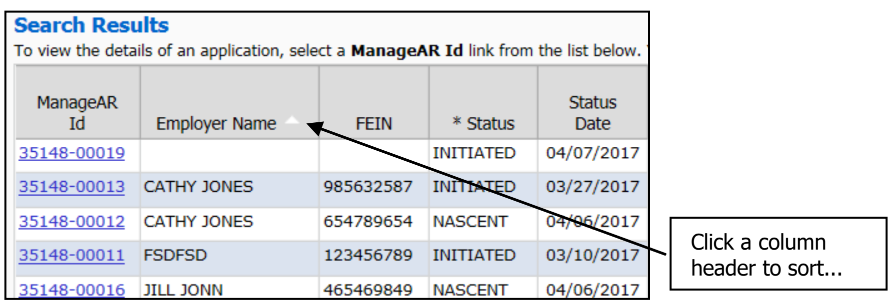
35148-00011	FSDFSD	123456789	INITIATED	03/10/2017				KENNETH MICHAEL	
35148-00016	JILL JONN	465469849	NASCENT	04/06/2017				KENNETH MICHAEL	
35148-00008	JOHN BLACK	123654987	NASCENT	02/23/2017				KENNETH MICHAEL	
35148-00014	JOHNNY JONES	854125874	NASCENT	04/06/2017				KENNETH MICHAEL	
35148-00002	KARIN OWNERSHIP	444555874	INITIATED	01/24/2017				KENNETH MICHAEL	
35148-00003	KARIN TEST2	113654856	INITIATED	01/25/2017				KENNETH MICHAEL	
35148-00017	KEN APRIL	231231654	NASCENT	04/07/2017				KENNETH MICHAEL	
35148-00015	KEN JONES	123544897	INITIATED	04/06/2017				KENNETH MICHAEL	

17 total records.

ManageAR uses a scrollable grid, or table, on many of its pages to display data. For example, as you add business names to the application, each business name is displayed in a grid at the top of the *Business Names* page.

You can use these grids to view and sort information, or to edit and delete entries.

Sorting Grid Information



Search Results

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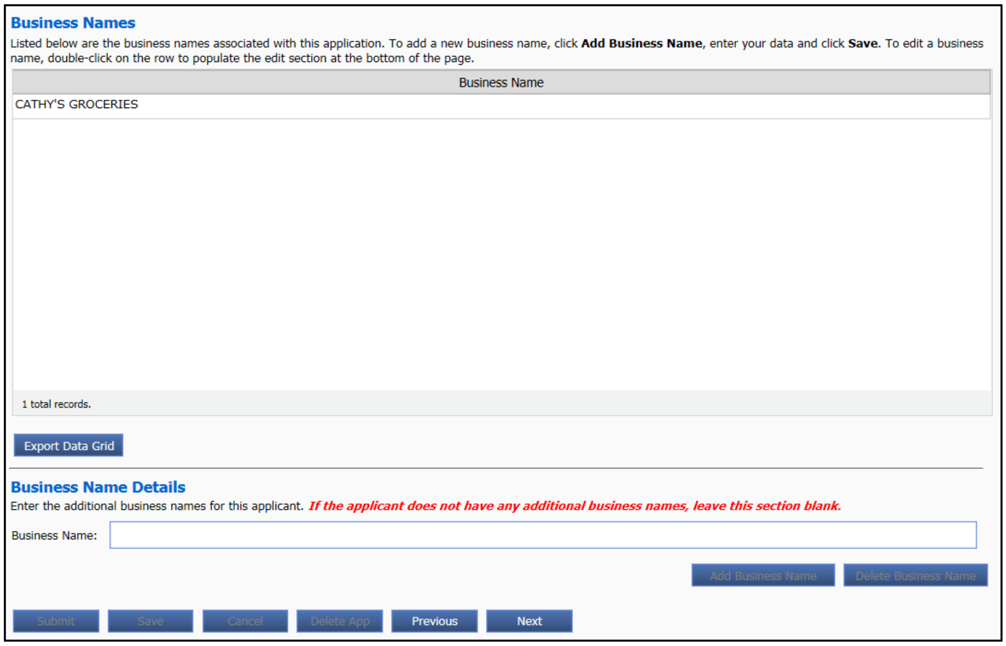
35148-00012	CATHY JONES	654789654	NASCENT	04/06/2017
35148-00011	FSDFSD	123456789	INITIATED	03/10/2017
35148-00016	JILL JONN	465469849	NASCENT	04/06/2017

Step 1. To sort the information in a ManageAR grid, simply click the heading of the column you want to sort. The first time you click a column header, the data will sort in ascending order. If you click the header again, the sort order will reverse.

Adding Information to a Grid

You can add entries to some of the grids in ManageAR. The following text uses the process of adding a business name as an example simply because this is the first time you will encounter a grid as you proceed through a new application. The process is similar on any page that allows you to add information to a grid.

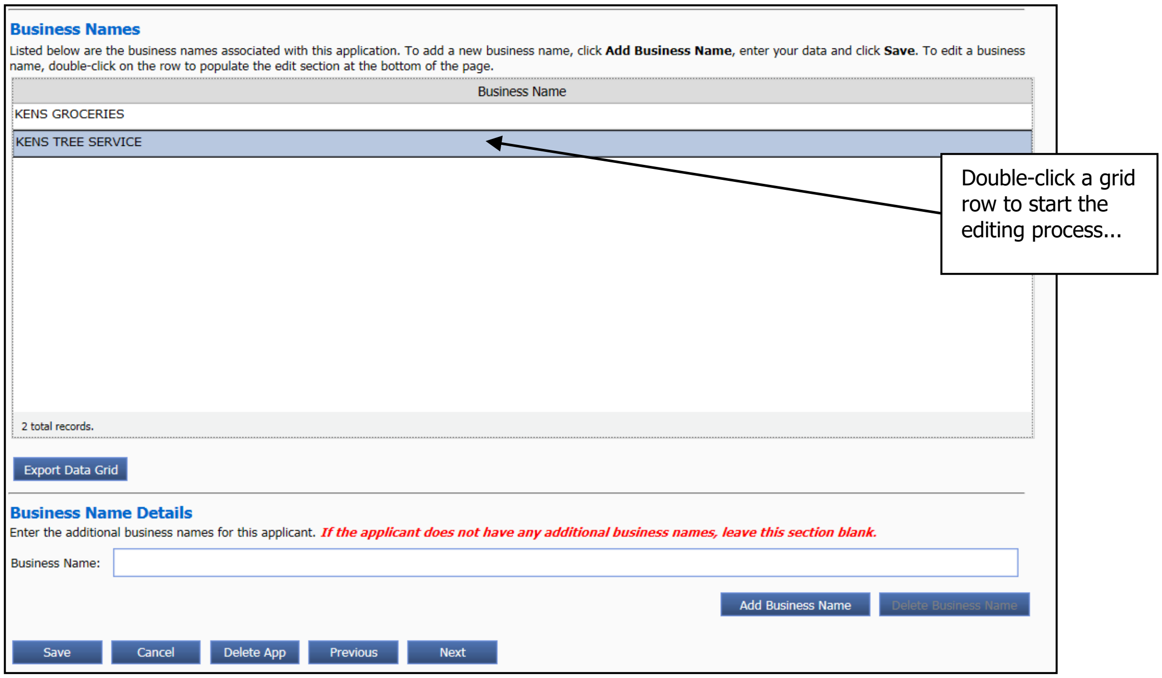


Step 1. On the *Business Names* page, type the new business name in the **Business Name** field. To save the business name you have three options:

- Click **Save** to save the business name. If applicable, any edit failures for the current page are displayed.
- Click **Add Business Name** to save the business name and add a second business name.
- Click **Next** to save the business name and proceed to the next page in the process. In the case of business names, *Next* will navigate you to the *Locations* page.

The new business name is added to the *Business Name* grid at the top of the page.

Editing Grid Information



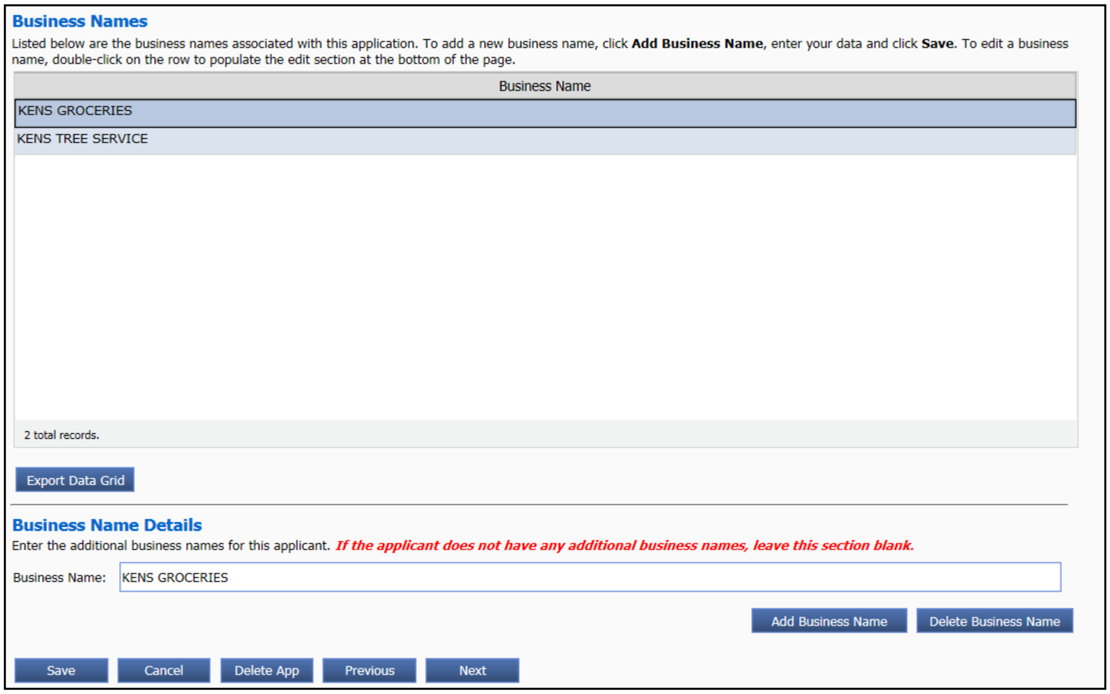
Step 1. To edit information in a grid, double-click the row containing the information you want to edit.

The page refreshes with the row information displayed in the fields beneath the grid.

Step 2. In the fields below the grid, edit the information you want to change.

Step 3. Click **Save**.

Deleting Grid Information



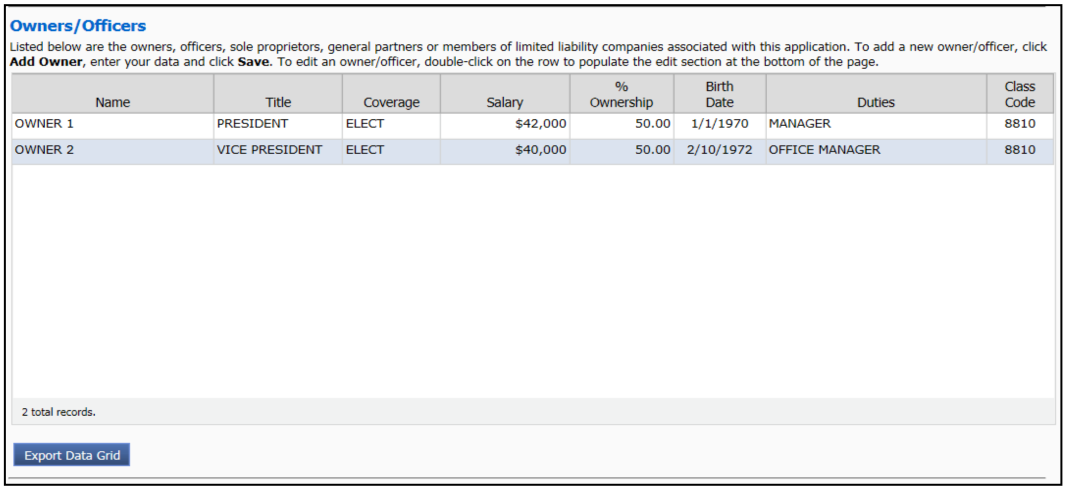
Step 1. To delete a row of information in a grid, first double-click the row to select it.

Step 2. The "details" section of the page is populated with the information from the selected row.

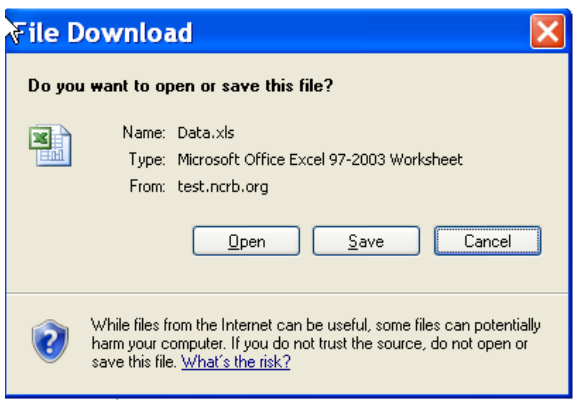
Step 3. At the bottom of the page, click the **Delete...** button.

Step 4. Click **Save**.

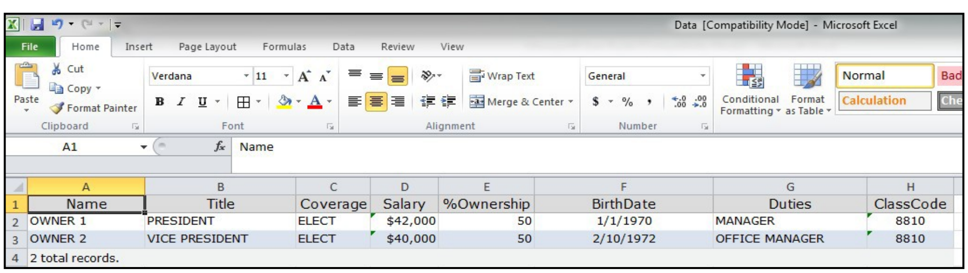
Printing Grid Information



Step 1. Once a row has been saved and appears in the grid, an ExportData Grid button will appear just below the grid. Click this button and an Open/Save/Cancel dialog will appear.



Step 2. Click the Open button. A new Excel spreadsheet will open with the exported data.



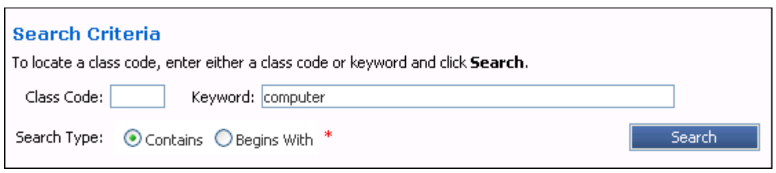
Step 3. Use the Excel print feature to print the data.

Class Codes

Class codes are four-digit codes that describe the type of work being done by the individuals employed by the applicant. ManageAR provides a class code search feature that simplifies adding the appropriate class codes to an application.

ManageAR also provides a pop-up tool to allow you to view a class code's assigned risk and loss cost rates for the past five years. For instructions on using this tool, see *Viewing Historical Class Code Assigned Risk Rates and Loss Cost Rates* on page 43.

Searching for a Class Code



To search for a class code:

Step 1. In the *Search Criteria* section on the *Class Codes* page, type a keyword in the **Keyword** field.

Step 2. Select either the **Contains** or **Begins With** radio button.

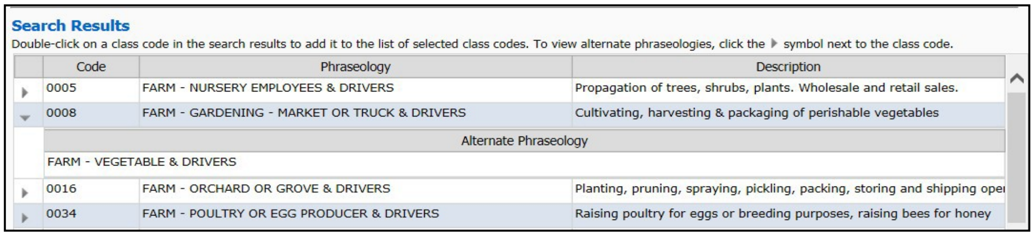
If you select *Contains*, the search results will return any class code whose primary or alternate phraseology contains the keyword entered.

If you select *Begins With,* the search results will return any class code whose primary or alternate phraseology begins with the keyword entered.

Step 3. Click **Search**.

The results of your search are displayed in a grid in the **Search Results** section.

Class Code Search Results



Step 4. To view alternate phraseologies for a class code, click the + symbol next to the class code in the **Search Results** grid.

Adding a class code to your application

Step 1. To add a class code to your application, double-click the class code's row within the grid in the *Search Results* section. The class is added to the *Selected Class Codes* section at the top of the page.

Step 2. Once you have added all of the applicable class codes to your application, enter **Payroll**, **# of Employees** and **USL&H Indicator**, if applicable, for each class code in the *Selected Class Codes* section.

Using Class Code EZ Add

If you know the class codes to be assigned to the application, you can use the ManageAR *Class Code EZ Add* feature.

Step 1. In the *Class Code EZ Add* section of the *Class Codes* page, type the class code in the **Class Code** field and click **Add.**

ManageAR will add the class code to the *Selected Class Codes* grid at the top of the page.

Step 2. Enter **Payroll**, **# of Employees**, and **USL&H indicator**, if applicable, directly into the grid.

Deleting Class Codes

You may remove previously selected class codes from your application at any point in time.

Step 1. In the *Selected Class Codes* section of the *Class Codes* page, click on the row that you would like to delete**.**

Step 2. Click the **Delete Selected Row** button. A message displays asking "Are you sure you want to delete this class code?" Click the **Yes** button. The selected class code is removed from the application. Click the **No** button to cancel the deletion.

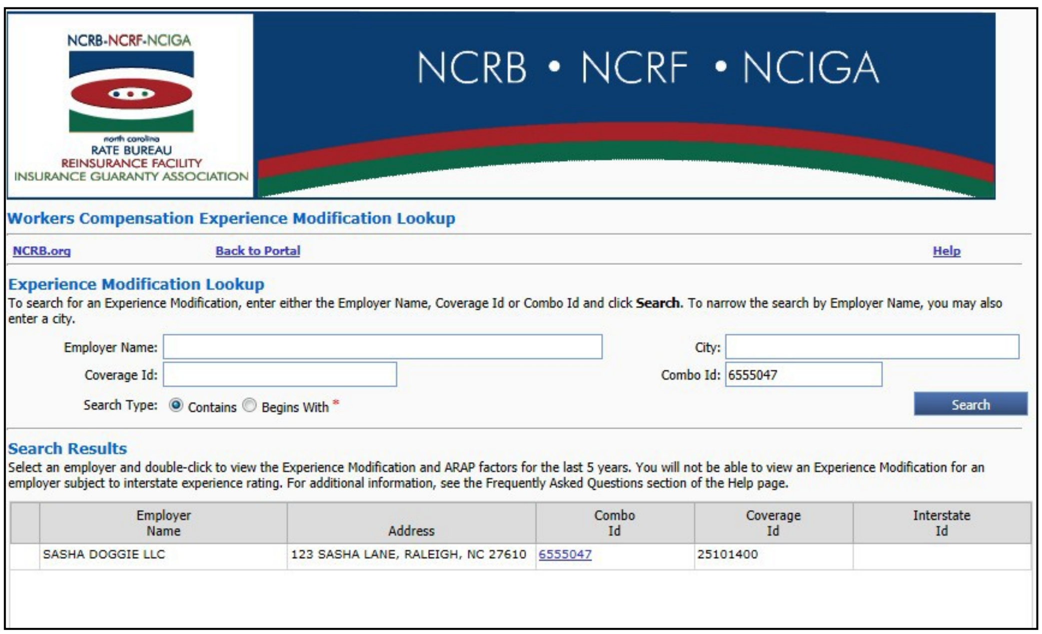
To delete all of the class codes assigned to the application, click the **Delete All Rows** button.

Searching for an Experience Modification

ManageAR offers two methods of searching for experience modifications:

- An **application lookup** allows you to populate the experience modification fields from a table of search results as part of filling out the 135NC application.
- An **Experience Modification Lookup** tool, available on the **Tools** menu, allows you to drill down to view the Experience Modification and ARAP values for the last five years (when available). For more information on using this tool, see *Viewing Historical Experience Modification Ratings* on page 45.

Searching for Experience Modification Factors



Step 1. On the *Exp Mod* page, enter any combination of search criteria in the *Experience Modification Lookup* section.

The *City* search field may only be used if you have also entered an *Employer Name*.

Step 2. Click **Search**.

The page refreshes, and the results of your search are displayed in a table in the *Search Results* section. Scroll through the results to find the company you are searching for. Click the **Alphabet Letters** at the top of the grid to display the employer names that begin with the selected letter/number.

Step 3. If necessary, click the **+** symbol beside the company name to view a listing of the employer's secondary names.

Step 4. If an experience modification and ARAP are available for the employer (as shown in the *Exp Mod* and *ARAP* columns), double-click the employer (or secondary name) row to populate the *Experience Modification* and *ARAP* fields with the data from the table.

If the Experience Modification value contains the word "CALL", then call the NCRB Information Center to obtain the employer's Experience Modification. If the Experience Modification value contains the word "NONE", then this indicates that the employer does not have an Experience Modification and that you should enter "1.00" in both the *Experience Modification* and *ARAP* fields.

Applying Payments to your Application

Payments must be made on all ManageAR applications using the E Payment method.

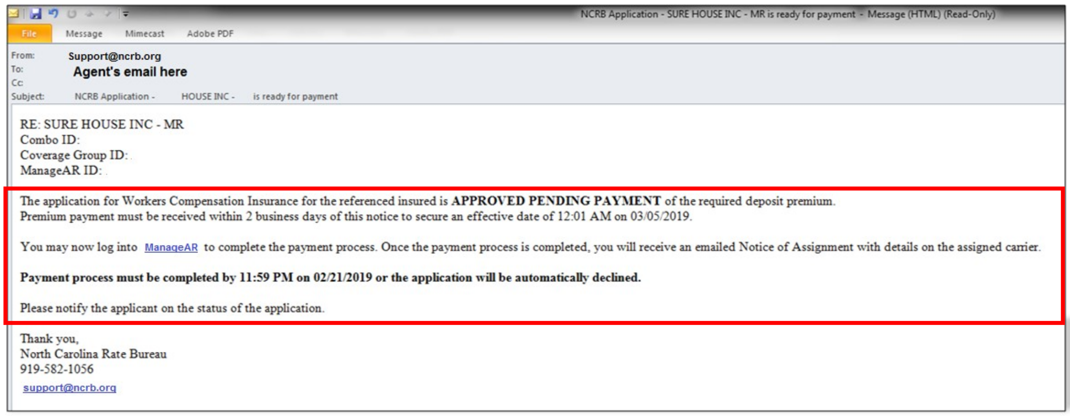
Coverage Effective Date Rules For Various Payment Methods

E Payments:

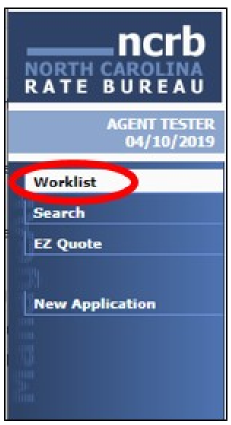
With E Payment, the earliest effective date of coverage will be 12:01am on the first day following the submittal of the application. The Bureau analyst may pend an application for 2 business days following a review in order to obtain further information from the agency, while still reserving the requested effective date. If the application is not completed within those two business days, the application will be declined. Once an application is approved for assignment, the agent will have two business days to pay the premium via the E Payment method in order to reserve the required effective date. If payment is not received within those two business days, the application will be declined.

Paying for Premium using a Bank Account

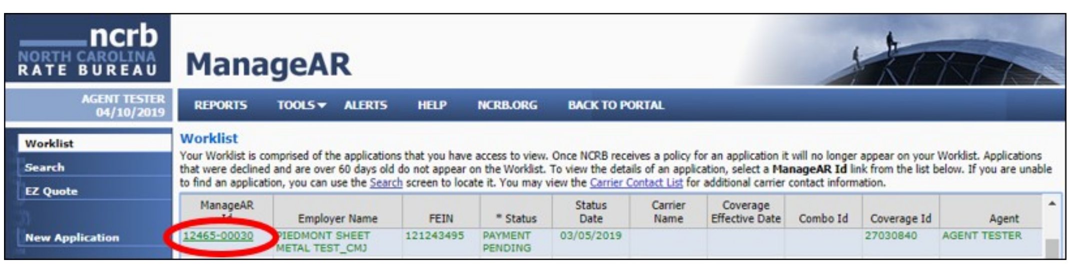
Step 1. When an application is approved for assignment, an email will be sent to the email address listed on the application requesting payment. Premium payment must be received within two business days to secure coverage.



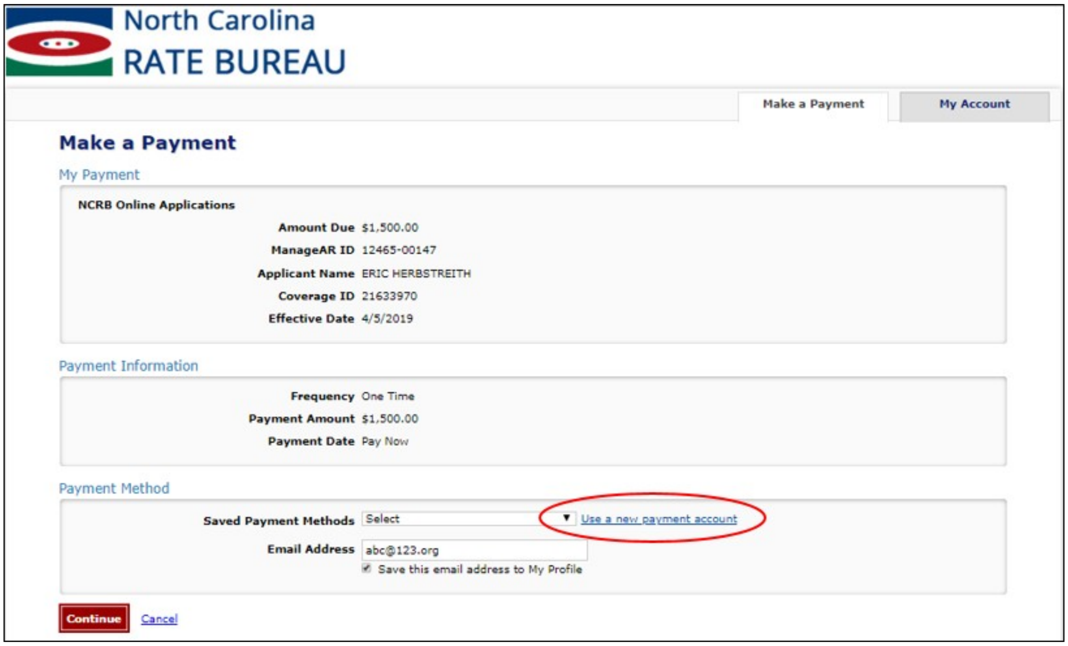
Step 2. Use the link from the email received or log into ManageAR web application and navigate to the **Worklist**.



Step 3. From the worklist, select the application that requires payment. This item will display with a green status of PAYMENT PENDING . Click on the ManageAR Id to navigate to the payment screen.



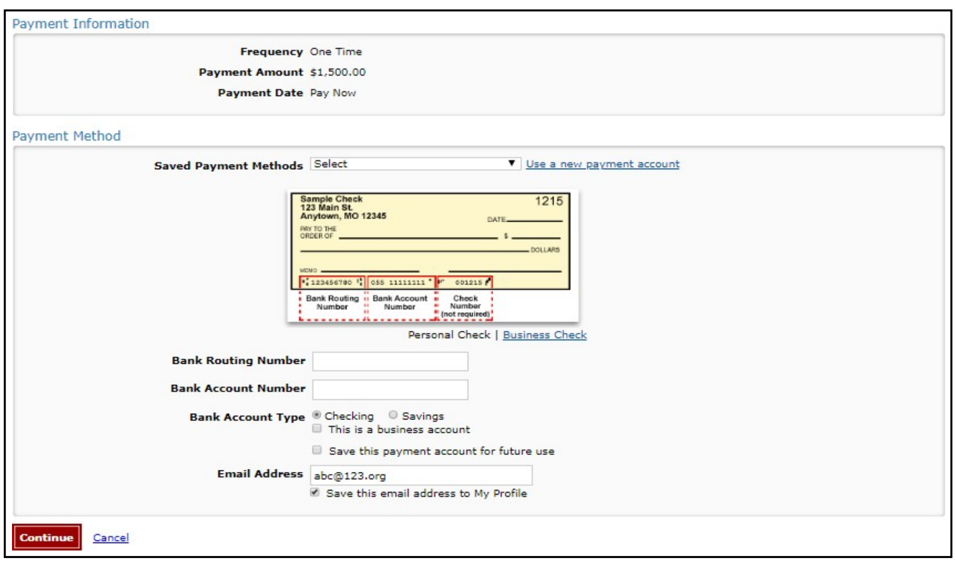
Step 4. Set up a payment account by clicking on “Use a new payment account” to set up your payment account. You will have the ability to save this payment method to use for future payments.



Select (Personal or Business) and enter in the Bank Routing and Account number. If you would like this account to be saved for future use, be sure to select the "Save this payment account for future use".

Please note: This payment account will need to be set once for each assigned risk carrier, which means you may have to set this account up more than once.

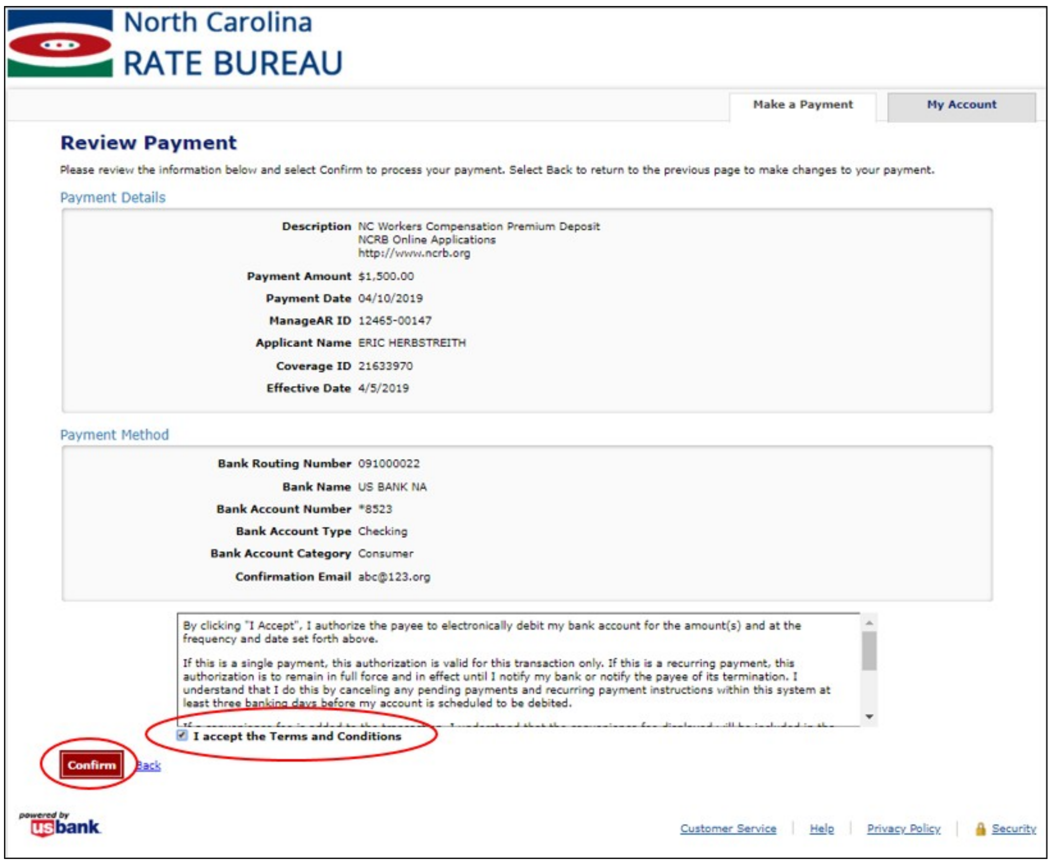
Please note: The email address on this page is populated from the application. It can be changed if you would like payment confirmation to someone else.



Step 5. Select “Continue” on the bottom, left hand side of the screen

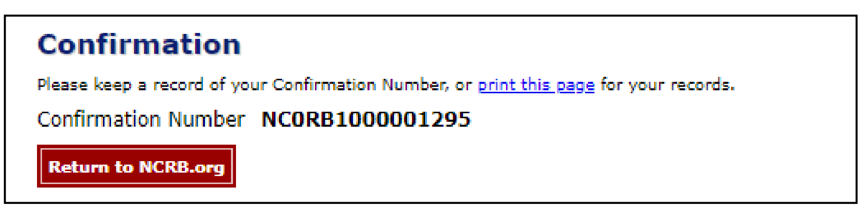
Step 6. Review the information entered to ensure it is correct and click the “I accept the Terms and Conditions” and select “Confirm” to move on to the next step.

Step 7. Once you confirm payment, you will receive three types of confirmation.



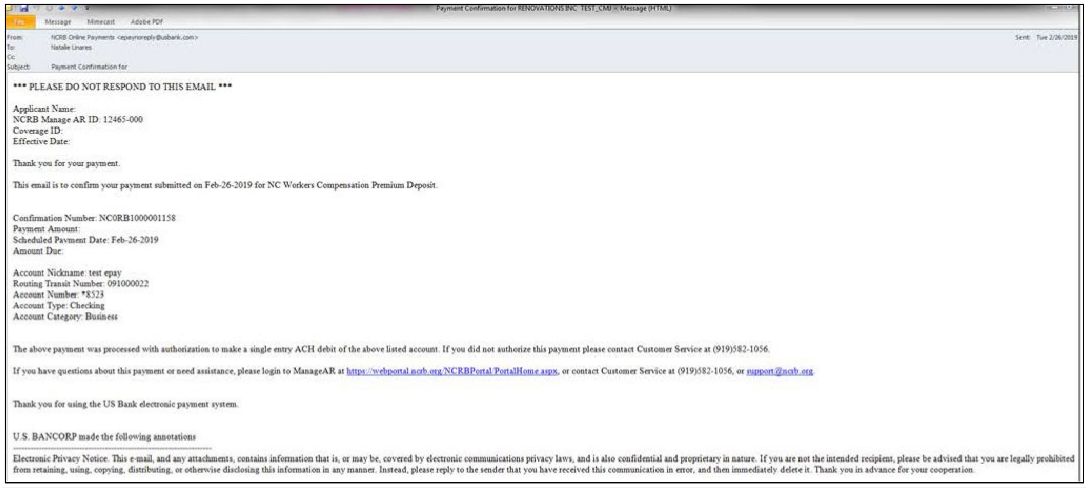
Confirmation # 1: <u>Website display confirmation:</u>

A confirmation number will display on the top of the website. You will also receive an email confirming payment.



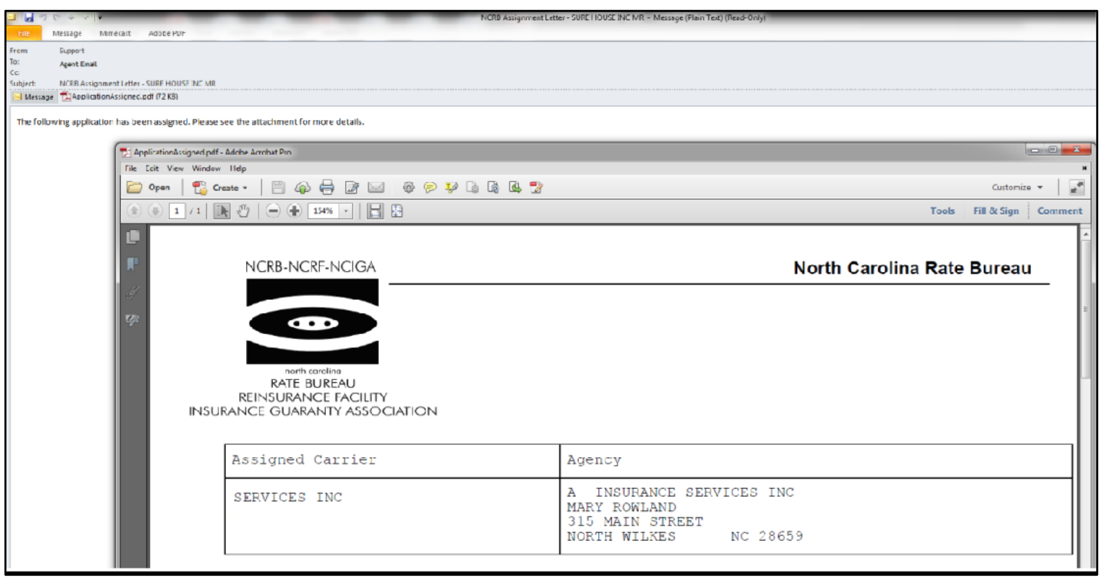
Confirmation # 2: Email – Payment confirmation:

This email is from U.S. Bank and will be sent to the email address entered in the US Bank website for payment.



Confirmation # 3: Email -Notice of Assignment from NCRB:

This email will have the subject NCRB Assignment Letter and will include a PDF attachment of the assignment letter and assigned carrier details.



Uploading Required Documents and Completing an Ownership Change

Uploading Required Documents

If General page questions 5, 6, 7 or 8 are checked ‘Yes’ and/or Payments page ‘Is this Premium Financed’ is checked ‘Yes’, the system will require documents to be uploaded before allowing a User to submit an application. The exception is if an NCRB Internal User is submitting a ManageAR application on behalf of an Agent, documents will not be required to be uploaded in order to submit an application. The following documents will be required based on General page answers:

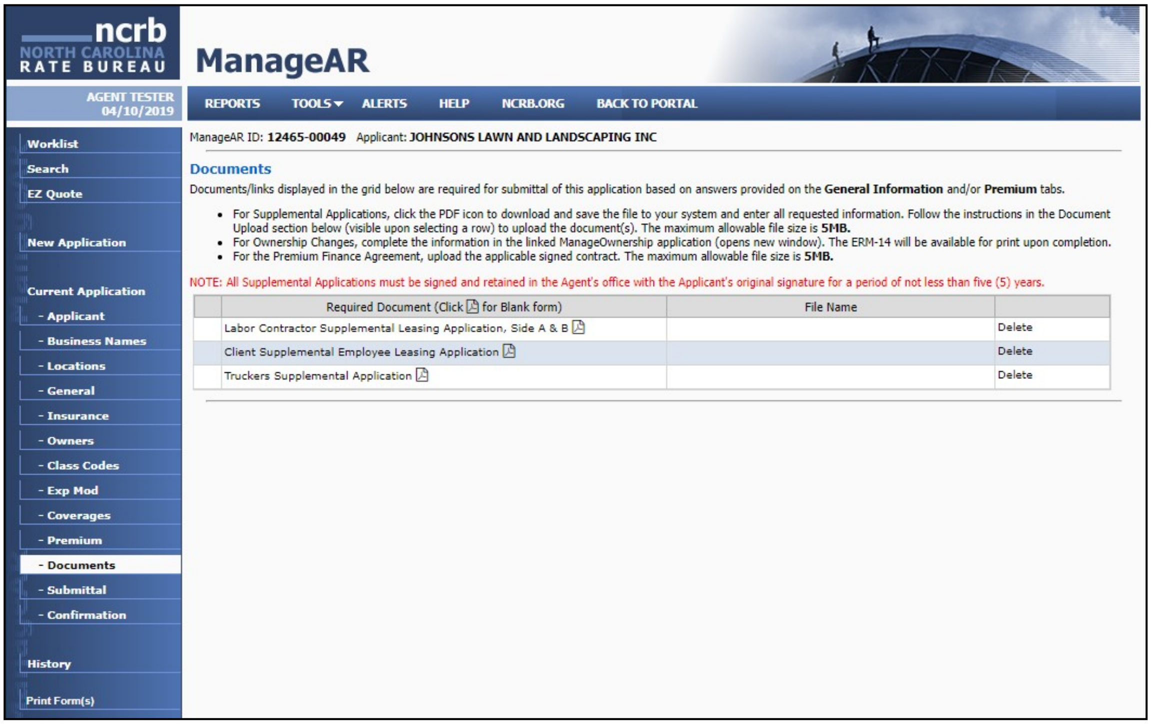
- Question 5: Client Supplemental Employee Leasing Application
- Question 6: Labor Contractor Supplemental Employee Leasing Application (Side A)
- Question 7: Labor Contractor Supplemental Employee Leasing Application (Side A & B)
- Question 8: Truckers Supplemental Application

The following document will be required when Payments page ‘Is this Premium Financed’ is checked ‘Yes’:

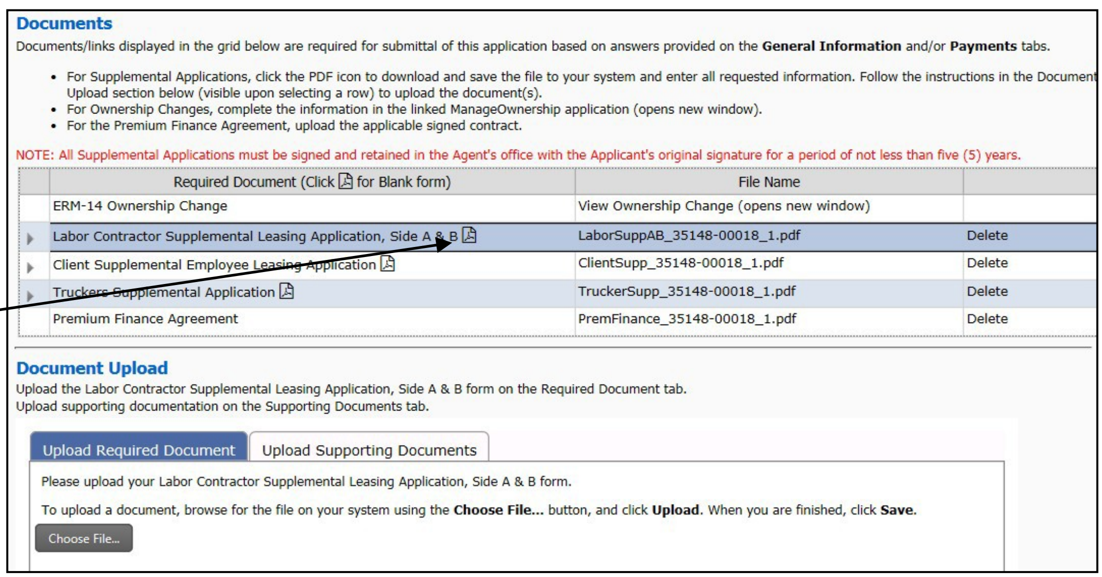
- Premium Finance Agreement

Step 1. In ManageAR, click the Documents tab.

Documents page



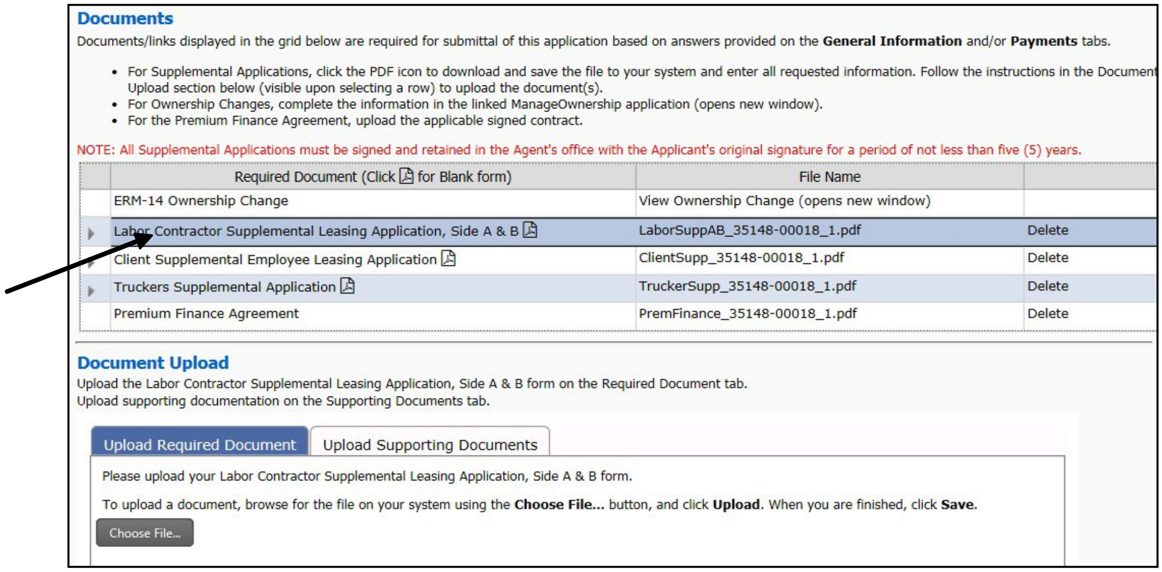
Step 2. Click on the PDF icon in a row in the Required Documents column to download an application.



Step 3. Save the application to a designated location on your computer.

Step 4. Complete the application, print, sign, and scan back to your computer.

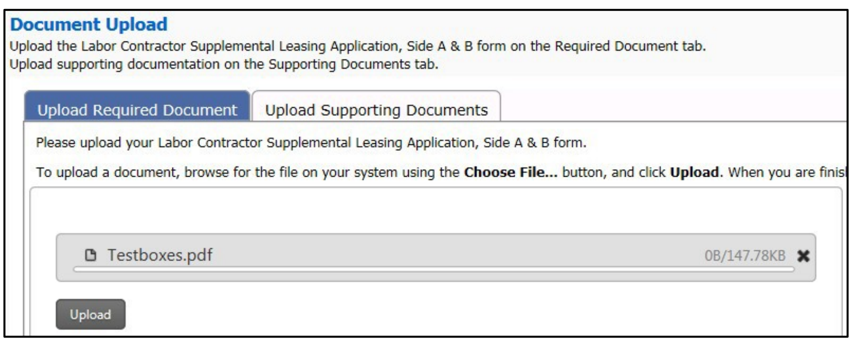
Step 5. Click on a row in the Required Documents column to view the upload button for the application.



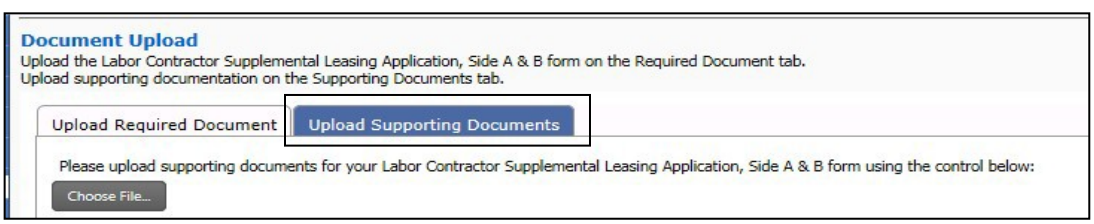
Step 6. Click on the Choose File button on the Upload Required Document tab.

Step 7. Select the completed application and click on the Open button.

Step 8. Click on the Upload button in the Upload Required Document tab. The file name column will be populated for the uploaded application.



Step 9. Upload any supporting documents, as necessary, by clicking on the Upload Supporting Documents tab for the application.



Step 10. Click on the Choose File button on the Upload Supporting Documents tab.

Step 11. Select a file to upload and click the Open button.

Step 12. Click on the Upload button in the Upload Supporting Documents tab. The Supporting Documents grid will display below the Application for which it was uploaded. The Supporting Documents column will display the file name of the uploaded file, and the File Name column will display a system generated file name.

Step 13. All uploaded documents will be included in the ManageAR application submission.

Uploaded Supporting Documents

Required Document (Click for Blank form)	File Name	
ERM-14 Ownership Change	View Ownership Change (opens new window)	
Labor Contractor Supplemental Leasing Application, Side A & B	LaborSuppAB_35148-00018_1.pdf	Delete
Supporting Documents		
LaborSuppAB_SupportingDoc_35148-00018_1.pdf		Delete
Client Supplemental Employee Leasing Application	ClientSupp_35148-00018_1.pdf	Delete

Completing an Ownership Change

If General page question 3 is checked 'Yes' the system will require the User to complete an Ownership Change Form before allowing a User to submit an application. The exception is if an NCRB Internal User is submitting a ManageAR application on behalf of an Agent, if General page Question 3 is checked 'Yes', an Ownership Change Form will not be required to be completed in order to submit an application.

Step 1. In ManageAR, click the Documents tab.

Step 2. Click on the ERM-14 Ownership Change link in the Required Document column. The ManageOwnership application will open and allow a User to complete and submit an Ownership Change. A User may choose to start an Ownership Change, then Save & Exit, and return at a later time to complete and submit the change.

Step 3. After the Ownership Change is submitted, the Documents page will display View Ownership Change (opens new window) in the File Name column.

ERM-14 Ownership Change

ManageAR ID: **35148-00004** Applicant: **KEN M MICHAELS**

Documents

Based on your answers in the **General Information** section, you must upload required documents for this application. To upload a document, browse for the files on your system using the **Choose File...** button, and click **Upload**. When you are finished, click **Save**.

Required Document (Click for Blank form)	File Name	
ERM-14 Ownership Change	View Ownership Change (opens new window)	

Step 4. Once an Ownership Form has been submitted, it cannot be edited. If changes need to be made, contact the NCRB, NCRF and NCIGA Information Center.

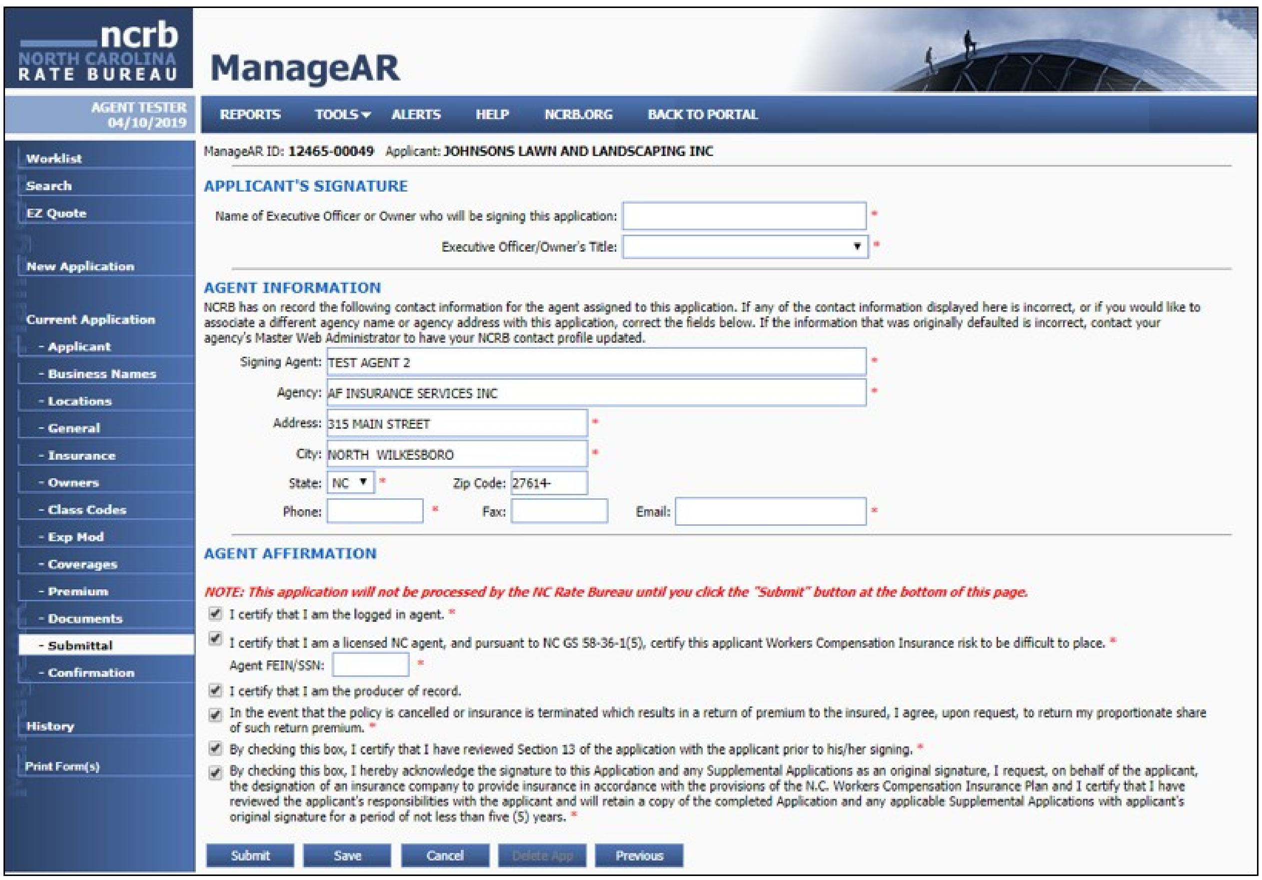
Step 5. An ERM-14 form affirmation will display on the Submittal page and require a User to check the box before the application will be allowed to be submitted.

Step 6. The completed Ownership Form will be included in the ManageAR application submission.

Submitting the 135NC Application to NCRB

Before attempting to submit the application, you should complete each page of the ManageAR application process. After you have successfully entered all the required information in the 135NC application, you are ready to submit the application to NCRB for processing.

One of the strengths of ManageAR is its ability to check for valid application information at the time of submittal. If errors are found, you will receive a listing of errors, or ***Edit Failures***, when you attempt to submit the application. For more information on dealing with Edit Failures, see *How to Correct Edit Failures* on page 39 of this Guide.



To submit the 135NC application:

Step 1. On the *Submittal* page, complete all required fields and “create” your electronic signature by selecting the checkboxes in the *Agent Affirmation* section.

Step 2. **To save the application without submitting, click** Save.

ManageAR will check for errors or missing information on the *Submittal* page.

If errors are found, the page will refresh with the errors listed at top **in bold red text**.

To submit the application, click Submit***.***

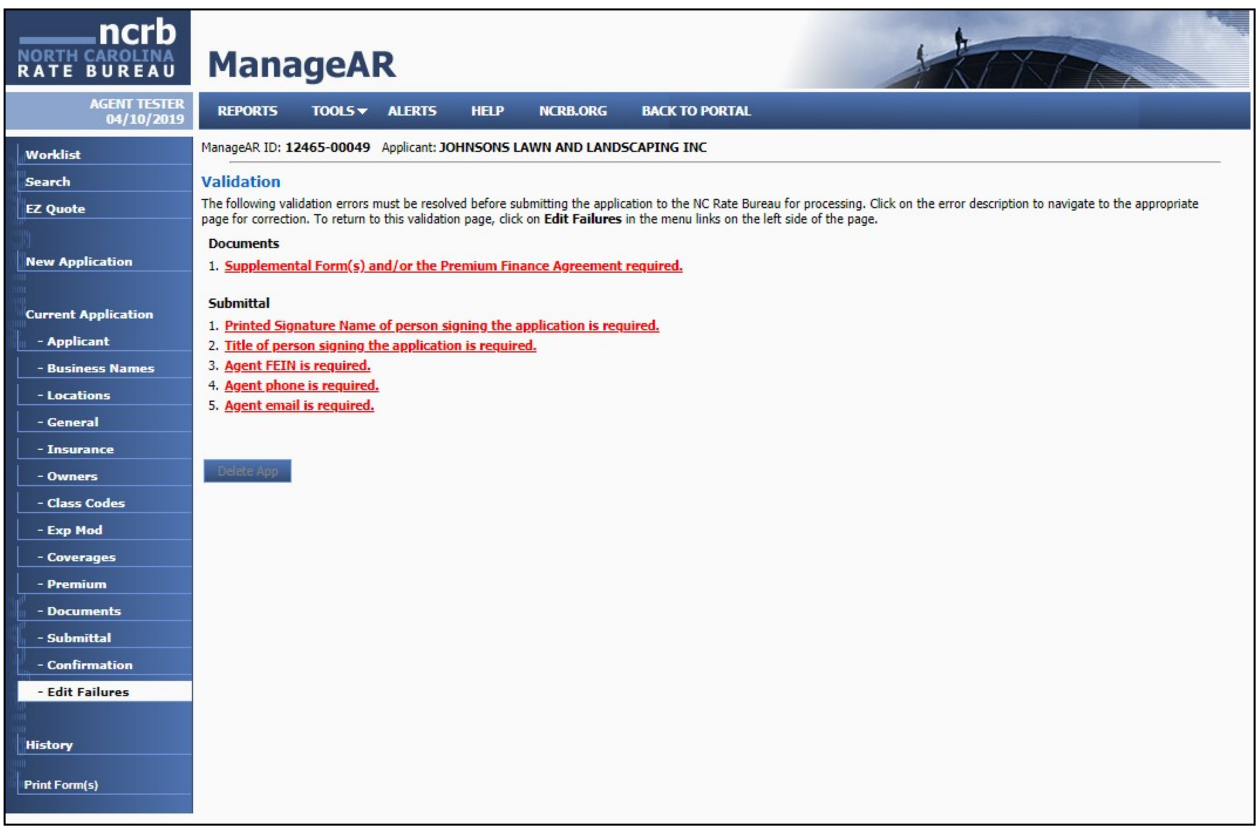
ManageAR will check for missing information (called *Edit Failures*) throughout the entire 135NC application. If errors are found, the page will refresh with the errors listed in **bold red text**. If no errors are found, the application will be submitted to NCRB.

How to Correct Validation Errors

Correcting Edit Failures for Submittal

When you submit a 135NC application, ManageAR checks the entire application for missing or incomplete information (known in ManageAR as *Edit Failures*).

ManageAR then creates a new page, located in the left column menu, listing all Edit Failures, with links back to application pages containing the Edit Failures.



To correct edit failures for submittal:

Step 1. On the *Edit Failures* page, click the item you want to resolve.

You will be taken directly to the page containing that Edit Failure.

Step 2. Correct all Edit Failures on the page, and then click **Save**.

ManageAR will save your corrected information, and then re-check that page for errors.

If remaining errors are found on that page, ManageAR will refresh the page with the validation errors displayed in **red text** in the appropriate section.

Step 3. To return to the list of edit failures, on the left sidebar menu, click **Edit Failures**.

Step 4. Repeat Steps 1-3 until all validation errors have been resolved.

Step 5. On the *Submittal* page, click the **Submit** button at the bottom of the page.

Individual Screen Edits

As you complete the pages of a 135NC application in ManageAR, you have two options to save the information you have entered on a particular page. If you click the **Next** button (at the bottom of the page), ManageAR will take you to the next page of the application without checking for validation errors.

If you click the **Save** button, ManageAR will perform a validation check on that page. If errors are found, the page will refresh with instructions displayed in **red text**.

You can correct the errors at that time, or you can elect to temporarily bypass the errors by clicking the **Next** button, or by using the left sidebar menu to jump to another page of the application.

Viewing a Confirmation

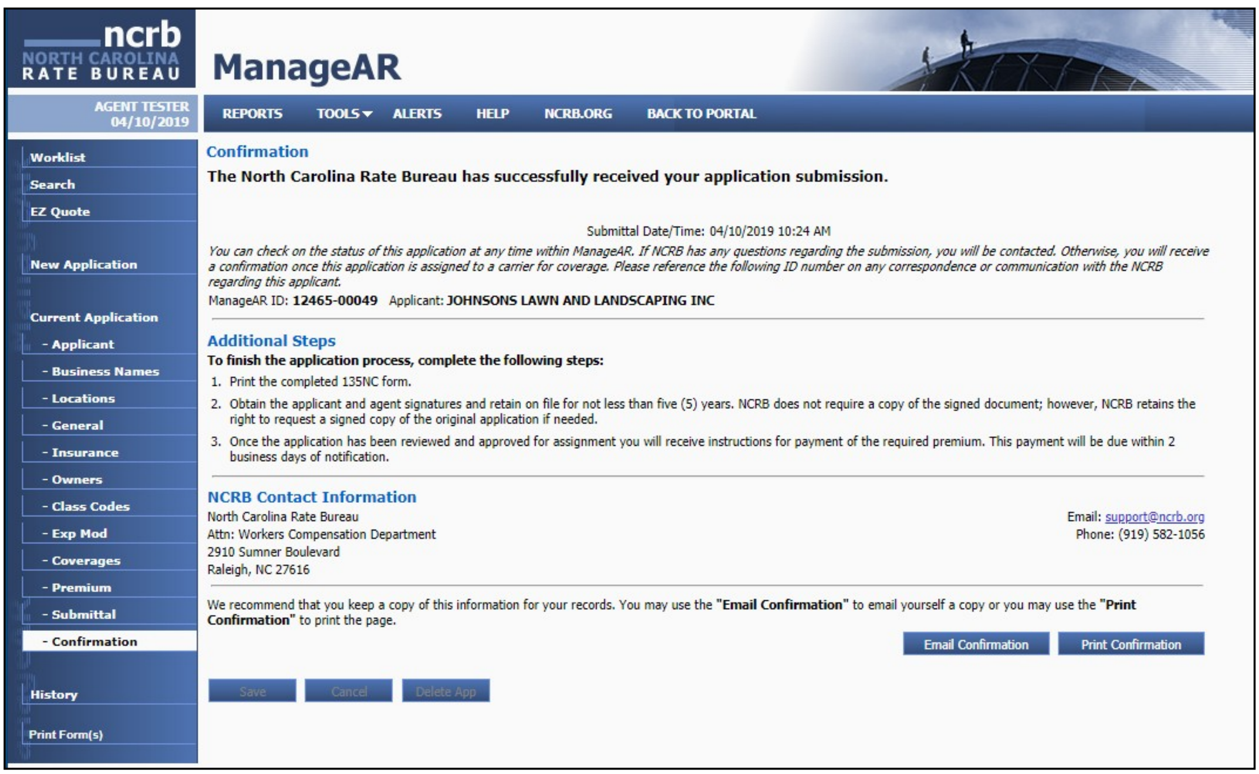
After a 135NC application is successfully submitted, a **Confirmation** page will display.

The **Confirmation** section includes all required uploaded documents included in the submission and an ERM-14 Ownership Change Submission ID (when required).

The **Additional Steps** section provides the user with information to complete the application process.

The **NCRB Contact Information** section provides the user with contact information for any questions they may have.

Users have the option to email and/or print the confirmation.



Printing a 135NC Form and Uploaded Documents

ManageAR offers the option of printing a hard copy of the 135NC form populated with the information you have entered and printing any documents uploaded (except the ERM-14) in the Documents page.

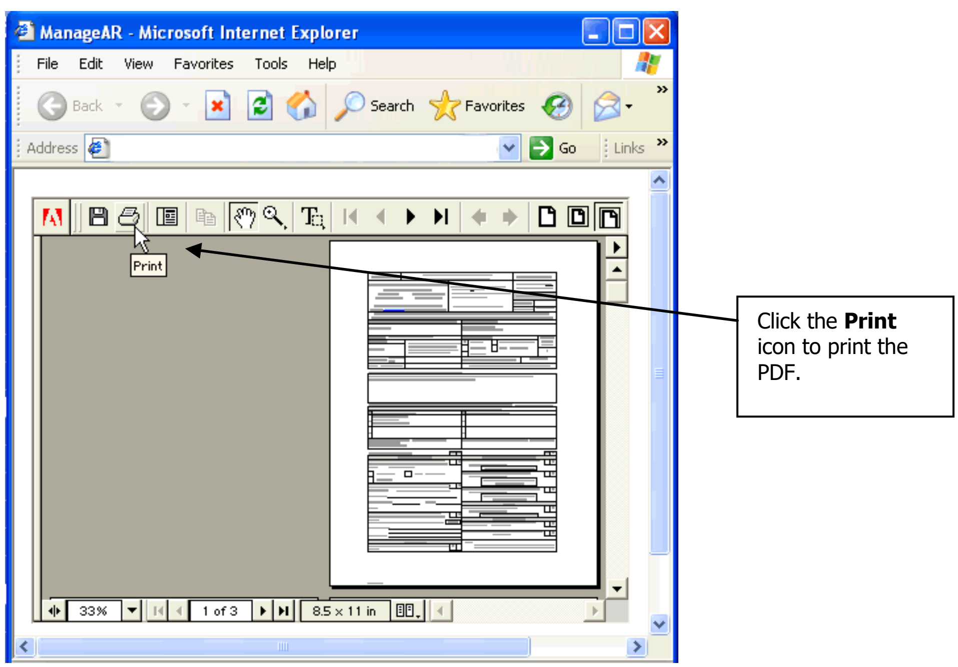
To print a completed 135NC and uploaded documents:

Step 1. On the left sidebar menu, click **Print Form(s)**.

A copy of the 135NC form (in PDF format), populated with the information you have entered, along with any documents uploaded in the Documents page, will be merged together and will open in a separate window.

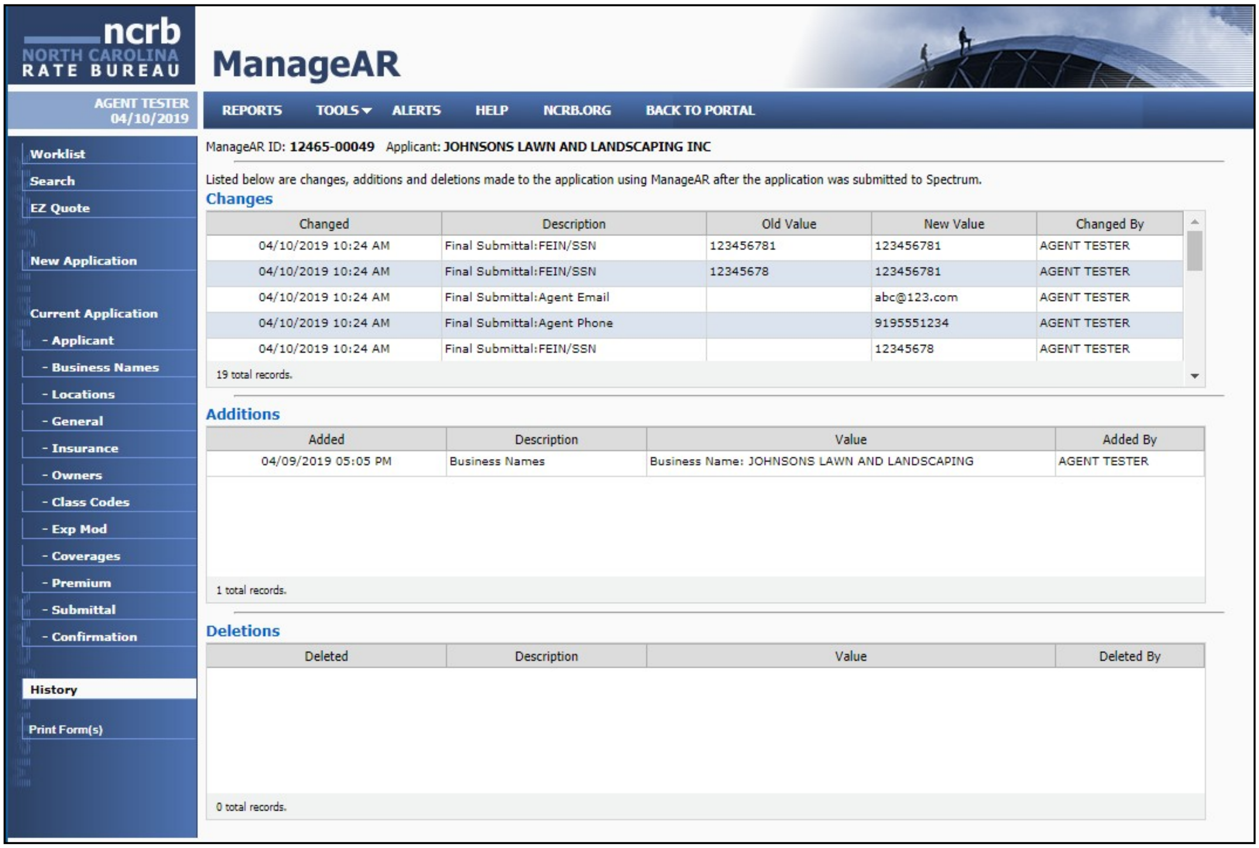
Step 2. On the toolbar in the new window, click the **Print** icon .

Printing a completed 135NC and uploaded documents.



Viewing an Application's History

Viewing the history of an application



To view the history of an application in ManageAR:

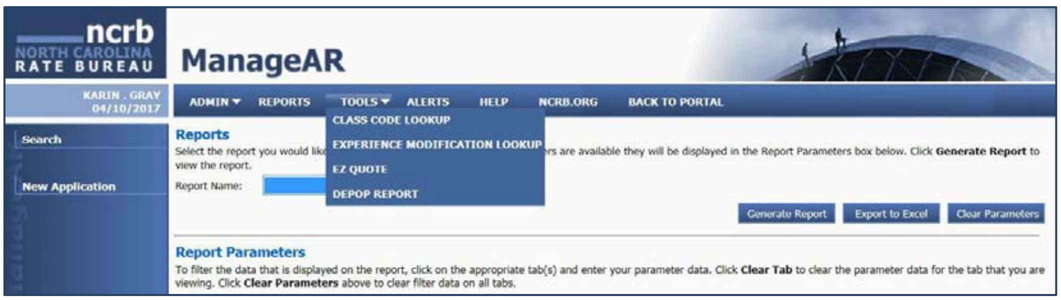
Step 1. Open an existing 135NC application (see *Viewing Existing 135NC Applications* on page 14 for help on locating existing applications).

Step 2. On the left sidebar menu, click **History** to see changes, additions, and deletions made to the application within ManageAR.

NOTE: The history of an application is only tracked after the application is submitted to NCRB for processing.

Viewing Historical Class Code Assigned Risk Rates and Loss Cost Rates

The *Class Code Lookup* tool allows you to view a class code's assigned risk and loss cost rates for the past five years



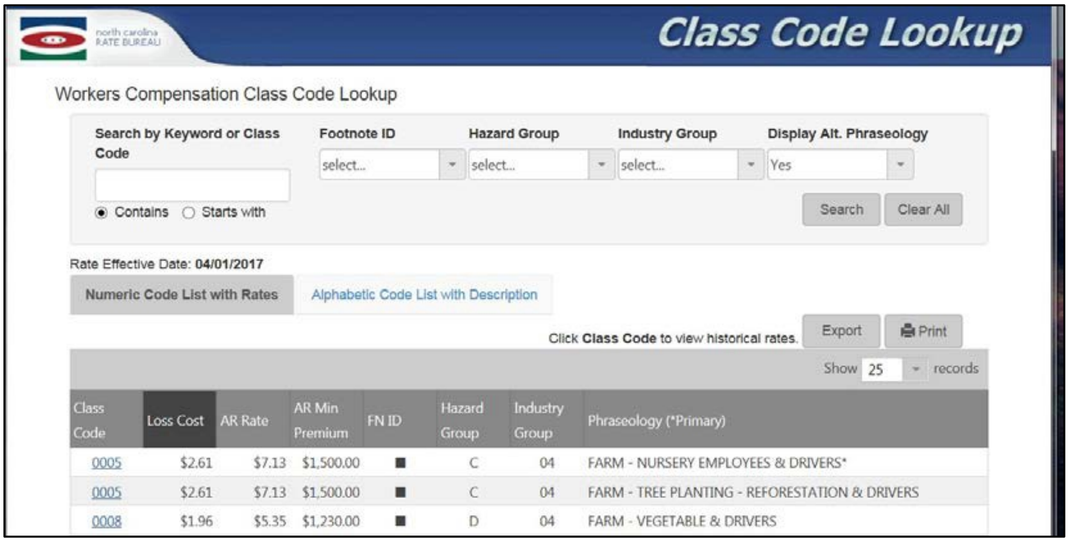
To use the Class Code Lookup tool:

Step 1. On the **Tools** menu, click **Class Code Lookup**. The tool will open in a new window.

Step 2. In the *Search Criteria* section of the new window, enter yoursearch criteria and click **Search**.

Step 3. The results of your search are displayed in a grid in the **Search Results** section.

Class Code Search Results

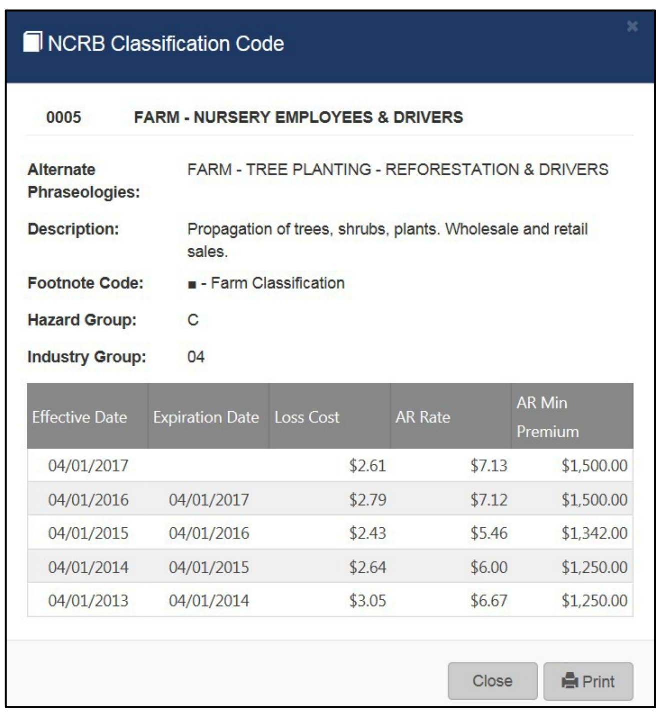


Step 4. Primary Phraseologies display with *

Alternate phraseologies display without an*

Step 5. To view assigned risk and loss cost rates for the last five years, click on the Class Code hyperlink that you want to view.

Class Code AR and Loss Cost Rates

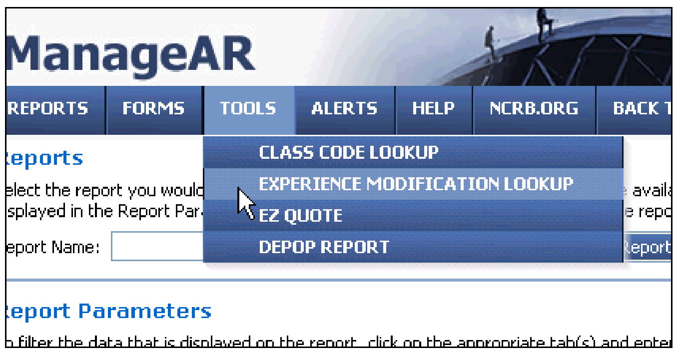


Viewing Historical Experience Modification Ratings

Using the Experience Modification Lookup Tool

The *Experience Modification Lookup* tool provides the ability to look up the Experience Modification and ARAP values for the last five years.

Open the Experience Modification Lookup tool with the Tools **menu.**



Step 1. On the **Tools** menu, click **Experience Modification Lookup**.

The *Experience Modification Lookup* tool opens in a separate window.

Step 2. Enter the search criteria and click **Search**.

The results of the search are displayed in a table in the *Search Results* section.

Step 3. To view assigned the Experience Modification and ARAP values for the last five years as well as any secondary names; double-click the row containing the Employer Name in order to view.

Viewing Experience Modification Worksheets

Using the Experience Modification Worksheets

The Experience Modification Worksheets provide a view of the worksheet information used in Ratings adjustments. It is provided for the inspection of those eligible to view the worksheet data on a company.

Step 1. Follow the three steps above to find the company desired.

Step 2. Select at least one Rating History entry for the Employer.

Step 3. Press the Worksheet PDF button the view the Worksheets.

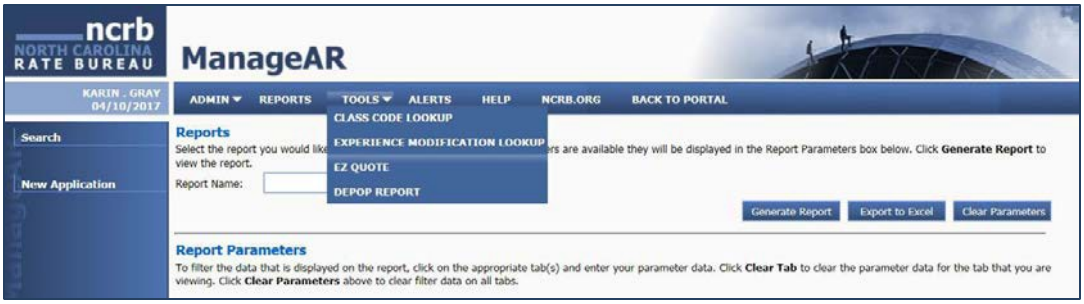
Step 4. The user may request to download a number of Rating's Worksheets with the Worksheet ZIP button. A ZIP file of all the worksheets available and selected will be created for viewing.

NOTE: The user will be asked to confirm that they have the legal right to view this Employer's information. This is a legally binding affirmation. If the user meets all the requirements displayed on the attestation, they should press Accept. Otherwise, the user must press Decline.

Using EZ Quote

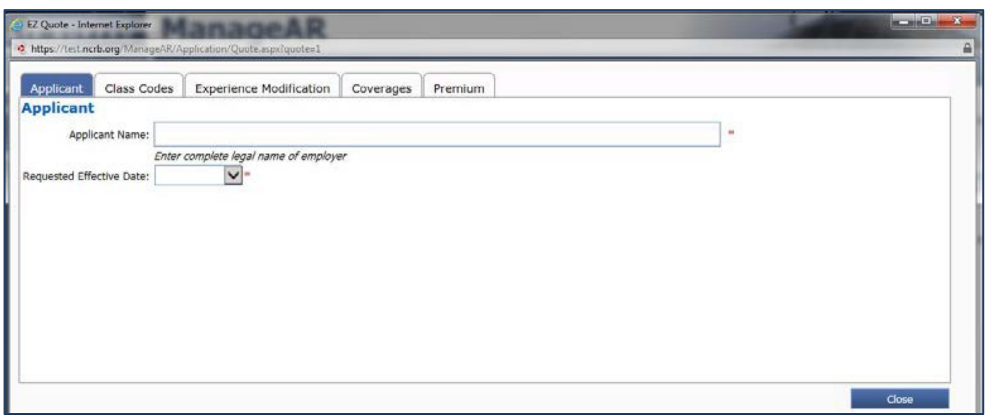
The EZ Quote tool allows you to quickly generate a premium quote without having to complete an entire 135NC application

Open the EZ Quote tool using the Tools menu



Step 1. On the **Tools** menu, select **EZ Quote**.

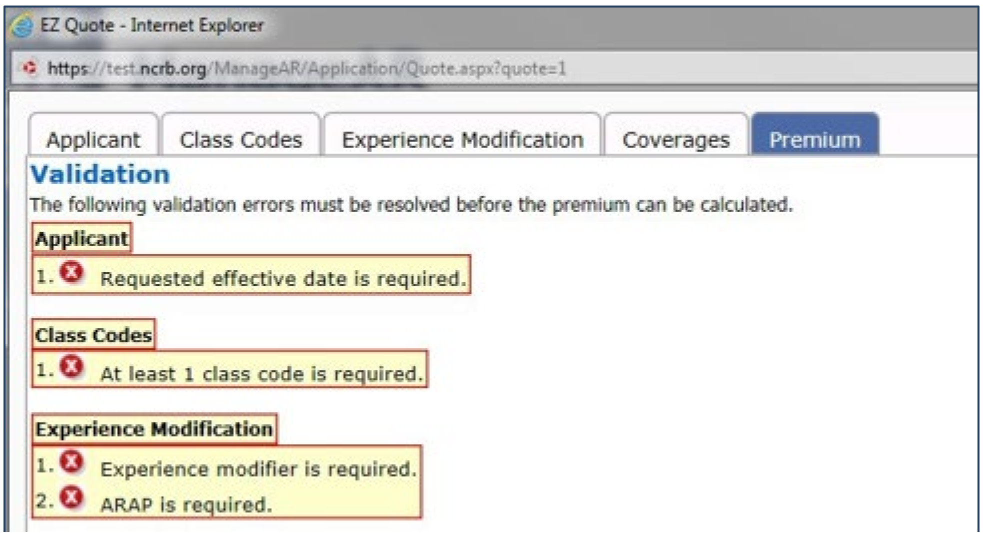
EZ Quote will open in a new window.



Step 2. Complete the information on the first tab (the **Applicant** tab), and then click the next tab (the **Class Codes** tab) to continue. Continue to complete each tab until all information has been entered.

When you click the **Premium** tab, EZ Quote performs a validation check to ensure you have entered all the necessary information. If EZ Quote finds validation errors, those errors will be listed in **bold, red text**.

EZ Quote checks for validation errors before generating a premium.



Step 3. If validation errors exist, correct the errors and then return to the **Premium** tab.

Step 4. If no validation errors exist, EZ Quote will provide a premium estimate based on the information you have entered.

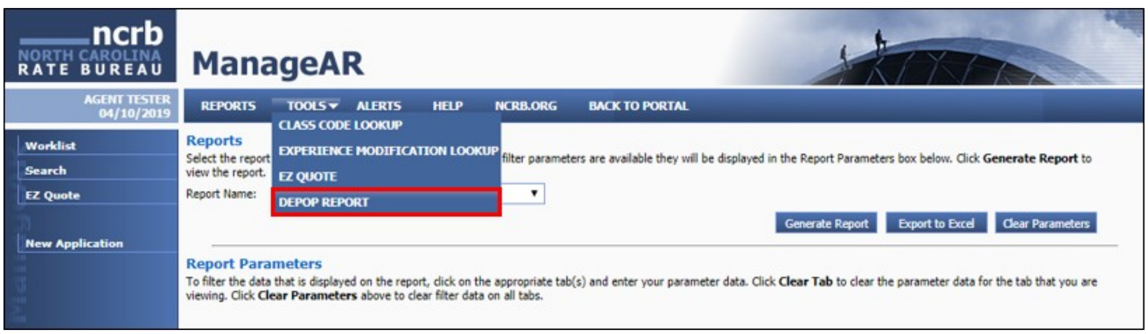
Step 5. To save your EZ Quote information as a new 135NC application, click the **Save As App** button at the bottom of the **Premium** tab.

Viewing the Depopulation Report

North Carolina law also authorizes the Rate Bureau to ”…maintain a compendium of employers refused voluntary coverage, which shall be made available by the Bureau to all insurers, licensed agents, and self-insureds' administrators doing business in this State. It shall be stored and indexed to allow access to information by industry, primary classifications of employees, geography, experience modification, and in any other manner the Bureau determines is commercially useful to facilitate voluntary coverage of listed employers.”

This **Depopulation Report** search screen has been designed to permit the creation of customized search criteria to return data that is most useful to the user to ” facilitate” obtaining voluntary coverage for the employers included in the database.

Depop Report Menu Item



To view the Depopulation Report:

Step 1. On the **Tools** menu, select **Depop Report**.

Step 2. Enter any combination of search criteria and click the **Search >>** button. The Depopulation Report data for the select criteria entered is displayed.

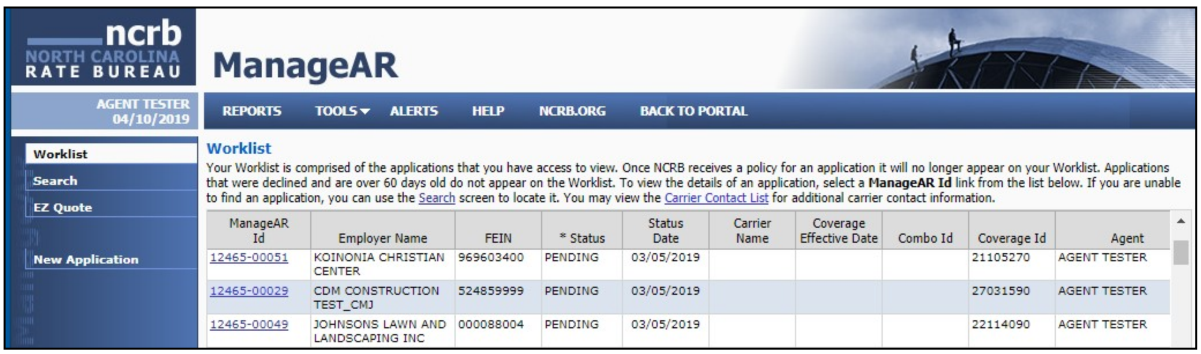
NOTE: At this time, the Depopulation Report is not available for electronic download. To obtain electronic data from this report, you may use your mouse to highlight the data on the page. Press Ctrl + C to Copy to data. In Microsoft Word or Excel, press Ctrl + V to paste the data for additional editing.

Obtaining Help

ManageAR offers several means of assistance to help you complete the process of submitting a 135NC application to the NC Rate Bureau.

On-Screen Instructions

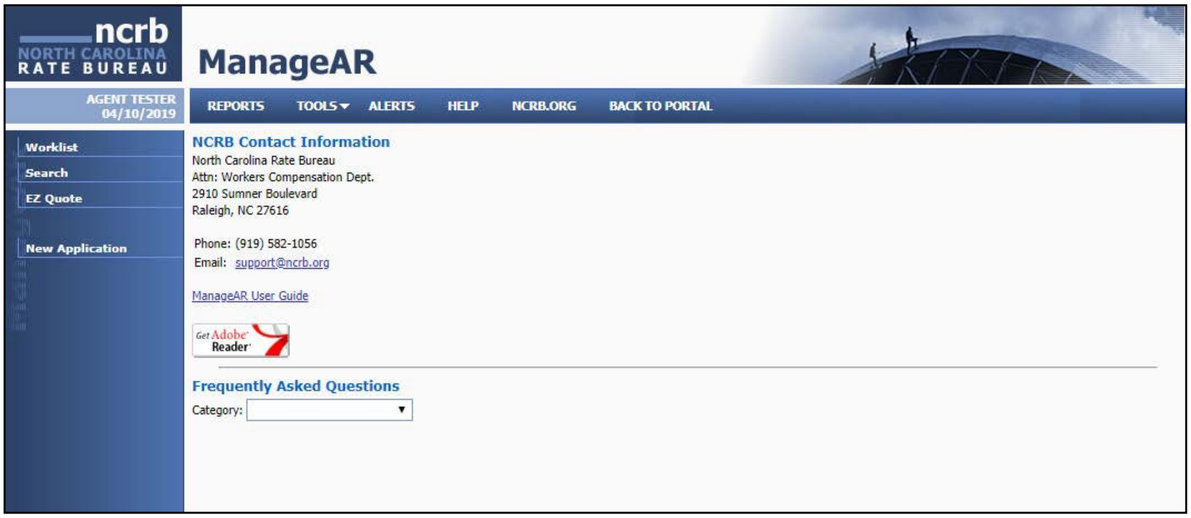
On-screen instructions provide assistance directly at the source.



On many screens, ManageAR provides instructions or hyperlinks regarding a particular section or field. If you are having trouble with an item, be sure to carefully read those on-screen instructions or click on the hyperlink for more information.

Frequently Asked Questions

Frequently Asked Questions



Answers to frequently asked questions are provided on the ManageAR Help page.

Step 1. On the top menu, select **Help**.

Step 2. In the *Frequently Asked Questions* section on the *Help* page, use the dropdown list to select a topic. These topics are categorized by application page.

The page refreshes to display a list of answers to frequently asked questions.