



BEEP User Guide

Summary of Changes

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Introduction

What is BEEP?

The BEEP® (Bureau Entry & Edit Package) application was developed by Compensation Data Exchange, or CDX and is an application designed to give Insurers and their authorized Third Party Administrators the ability to enter, edit, validate and electronically submit unit statistical report (USR) information.

The BEEP application also allows for the import of the USR data in the WCSTAT, (Workers Compensation Statistical Data Specifications) format. For additional information regarding WCSTAT, see the WCIO (Workers Compensation Insurance Organization) website www.wcio.org.

Validation rules vary by DCO and the only definitive source of that information is the individual DCO's "Unit Statistical Plan" or equivalent DCO approved guide. BEEP should significantly reduce erroneous USRs; however, passing the BEEP validation process is not a guarantee that the USR will be processed without error by a DCO. Likewise, failing BEEP's validation process does not preclude that the USR will fail the edits of individual DCOs.

BEEP is capable of handling nearly all USRs but does not handle ICR records.

Establishing a BEEP / CDX Account

Access and security to BEEP are provided through the CDX system. In order to access BEEP, Users must have a CDX account. The CDX User Guide is available on the CDX website at www.cdxworkcomp.org. It includes information about how to set-up a CDX account. The guide describes various access levels and outlines specific instructions for carrier use.

For more information on establishing your account, view the Computer Based Training on the CDX website under "Online Training" and click on "CDX".



You may also contact the CDX Central Support, or the CDX Representative(s) at the appropriate DCO(s) listed on the Contact Us page located on the CDX website.

Permissions

All Users must have permission to use BEEP. The Insurer's Primary Administrator and the Insurer's User with Administrative Permissions grants this permission. Users will be given access to the BEEP menu along with the ability

to view BEEP data and/or enter and modify BEEP data. Users will access the application with their Username and password.

The Insurer's Primary Administrators have access to the USRs for all the carriers in their group, while the Insurer's Users only have access to the USRs that are written through carriers they have been granted access to. They may also import WCSTAT files and create new WCSTAT submission files from BEEP.

Certain Users may only be given permission to view USRs for the "Carrier Code" for which they have been given permission. Additional permissions may be given to allow entry and updating of USRs, importing of WCSTAT files, and creating WCSTAT submission files.

A Third-Party Administrator (TPA) and TPA User may be given permission to view USR data for which they are associated. Additional permission may be given to allow entry and updating of USRs, importing of WCSTAT files and creating WCSTAT submission files.

BEEP Overview

BEEP allows for the data entry of all data elements needed to create a USR. The data elements create the records and the records create the USR. The main records of a USR are the “Header Record”, “Name Record”, “Address Record”, “Exposure Record”, “Loss Record” and the “Unit Total Record”. Each of the records is connected to each other by the “Link Data”.

The BEEP data elements are converted into the standard USR format required for electronic reporting. That standard format is specified in the WCSTAT section of the WCIO (Workers Compensation Insurance Organization) Workers Compensation Data Specifications Manual, which can be found on the www.wcio.org website.

USRs are created in accordance to each Data Collection Organization’s (DCO’s) set of rules and regulations contained in their “Statistical Plan Manuals”. BEEP edits are very basic; therefore, each DCO will perform additional edits as determined by their business needs.

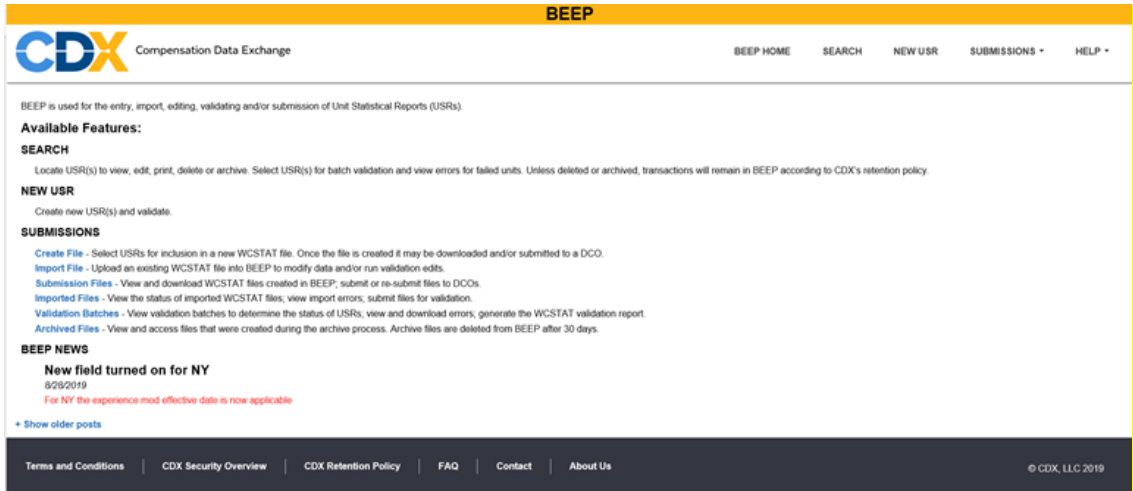
Additionally, not all DCOs accept every data element that can be produced through BEEP. Contact individual DCOs for information on the data that are accepted at their DCO.

The finished, validated USRs can then be bundled into an electronic submission file for transmission to the DCO. Alternatively, WCSTAT USR data can be developed by other means and then imported into BEEP for validating and/or submission. BEEP allows for the import of USR data in the WCSTAT format.

There are 6 menus available within BEEP: “BEEP HOME”, “SEARCH”, “NEW USR”, “SUBMISSIONS”, “CLASS CODES” and “HELP”.



The BEEP HOME tab brings you to the “Available Features” screen which is shown when you first click on the BEEP menu after logging in.



This Guide will describe each menu's features. Data entry / input screens are referred to as pages in this User Guide.

Navigating Between Pages and Result Pages

Navigating Between Pages

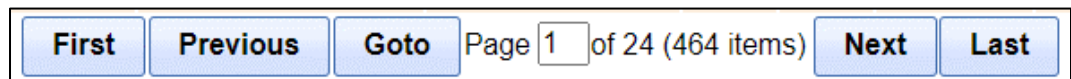
BEEP will save any work done on the page before moving to the next page.



If you click on a new tab on the menu bar, your data will not be saved. If the data needs to be saved, you should click on "Save".



Navigating Results




If there is more than one page of results, you can move to different pages by clicking on "First", "Previous", "Next", and "Last" at the bottom of the page.


To go to a specific page, enter the page number in the "Page" field then click on "Go To" page.

Field Color Codes

The state in the “Exposure / State” field determines which DCO’s rules are used for mandatory and optional fields. These fields are color coded to indicate whether they are mandatory, disabled, or optional. The colors are as follows:

 Symbol indicates a required, mandatory field. These fields must be entered before the USR can be saved.

White indicates the field is editable. Some of these fields may be required to pass validation, depending on individual DCO requirements or the value of other fields on the USR. Please refer to the individual DCO’s Statistical Plan for further details.

 indicates the field is disabled. These fields will not allow values to be manually entered; however, imported USRs accept and retain the data reported in all fields.

 indicates the field has failed validation or missing required information.

Field Types

There are 4 types of BEEP data fields:

Alpha - Letters are saved as entered whether uppercase or lowercase letters.

Alphanumeric - BEEP accepts alpha, numeric, and special characters in alphanumeric fields. The two exceptions are “Policy Number” and “Claim Number”—they do not accept spaces or special characters.

Numeric – Numeric fields allow number values only. The “Manual Rate” and “Experience Mod” fields are the only fields that require entry of a decimal point.

Note: Negative numeric values are not allowed.

Date – Dates must be entered as (MMDDYY) month, day, and year. BEEP will alert you if an invalid date is entered.

USR Status Types

Once you have entered and saved all or any portion of the USR the status will be identified. The various statuses are:

“Unedited” - Validations have not been done or the USR has been changed since it was last validated.

“Passed” - Validations have been completed without errors. There may or may not be warnings.

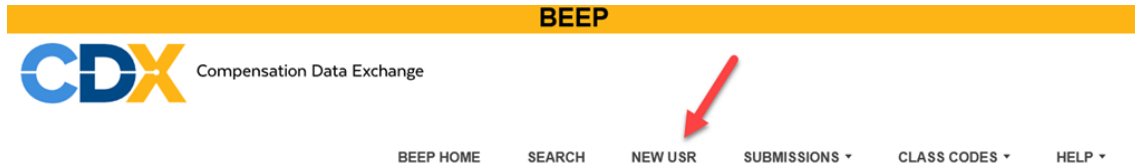
“Failed” - Validations have been completed and errors were detected.

“Submitted” - USR edit status is “passed” (or forced), and the USR has been included in a submission file—no other changes can be made to the USR data. USRs will be in “Submitted” status if imported as “Submitted USR” instead of “New USR”.

Note: A USR with the edit status of “Submitted” can no longer be modified; thus, if an error is detected, you will need to create a correction report.

Create New USR

The initial step to creating a manually entered USR begins by clicking on “New USR” menu.



You will be navigated to the “Create a New USR” page where you will select the “Exposure State” from the dropdown menu and enter the “Carrier Number”. Once this is completed, click on “Create” to generate a new USR.

A screenshot of the "Create A New USR" form. The form has a title "Create A New USR" at the top. Below the title, there are two input fields: "Exposure State:" with a dropdown menu showing "None selected" and "Carrier Number:" with a text input field. At the bottom of the form is a blue "Create" button.

You are then navigated to the “Header” page, which represents the Policy Information section of the USR hardcopy form. Some fields on the hardcopy form are not included on the electronic form. These include Page Number, Last Page Number, Reserved for Carrier Use, and Reserved for DCO Use.

The “Mod Effective Date” and “Rate Effective Date” fields are found on the “Exposure” page.

Each of the data entry pages use field data entry rules to perform basic edit checks to help you enter valid field values. The nature of some of these checks is controlled by the value entered in the “Exposure State” field.

Header Info

When creating a USR, the “Header” information is entered first. The “Header” page has three sections.

Top Section of “Header”

The top section of the “Header” page contains data fields that are used to identify the specific USR and the policy to which the USR belongs. The top two rows of this section include a group of data fields that are collectively called the “Link Data”.

The “Link Data” contains the following data fields:

- Report Level Code / Report Number
- Correction Sequence Number
- Separated Segment Number
- Carrier Code
- Policy Number Identifier
- Policy Effective Date
- Exposure State Code

All the “Link Data” and the “Policy Expiration Date” must be entered to save the USR or to navigate to another page.

The “Link Data” identify and connect all the records of an individual USR. They are displayed at the top of each page.

Additionally, the “Carrier Code”, “Policy Number Identifier”, “Policy Effective Date” and “Exposure State Code” are used to connect all report levels and correction reports for a specific policy and state.

The screenshot shows a web form titled "Header - UNEDITED". At the top, there are tabs for "Separated USR", "Header" (which is selected), "Exposures" (with a sub-tab "Exposures: 0"), "Losses" (with a sub-tab "Losses: 0"), and "Loss Totals". Below the tabs is a "Policy Info" section with the following fields: Report # (01), Corr Ind (00), Correction Type (dropdown), Rep. Rpt. Ind. (checkbox), Carrier (R6001), Policy Number (text), Policy Eff Date (MMDDYY) (text), Policy Exp Date (MMDDYY) (text), Exposure State (31-NEW YORK), State Eff Date (text), Card Serial # (text), Risk ID # (text), Insured's Name (text), Address (text), Business Segment Identifier (text), FEIN (text), and Pending File No. (text).

The top section of “Header” page contains the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Report #	Report Level Code/Report Number	Defaults to “01”
Corr Ind	Correction Sequence Number	Defaults to “00”
Corr Type	Correction Type	Dropdown (only if Corr

		Ind > 00)
Rep Rpt Ind	Replacement Report Code	
Carrier	Carrier Code	
Policy Number	Policy Number Identifier	
Policy Eff Date	Policy Effective Date	MMDDYY
Policy Exp Date	Policy Expiration Date or Policy Cancellation Date	MMDDYY
Exposure State	Exposure State Code	
State Eff Date	State Effective Date	MMDDYY – The date the state was added to the policy mid-term.
Card Serial #		
Risk ID #	Risk ID Number	
Insured's Name	Name of Insured	
Address	Address of Insured	
Business Segment Identifier	Business Segment Identifier	
FEIN	Federal Employer Identification Number (FEIN)	
Pending File No.		

Header - UNEDITED

Separated USR	Header	Exposures Exposures: 0	Losses Losses: 0	Loss Totals
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Navigation Links

At the top of the page you have several navigation options. Clicking on a given option will perform a specific function. These options include:

Separated USR – Used when directed by a DCO to report separated segments for a USR.

Exposures – Navigates you to the “Exposures” page and displays exposure information.

Losses – Navigates you to the “Loss Info” page and displays loss information.

Loss Totals – Navigates you to the “Loss Totals” page and displays loss total information.

When navigating between the USR pages, data entered on any page is retained and will be displayed when returning to that page.

If you select another function (i.e. leave the USR), the system will not save any data that was not saved by navigating to a new page within the USR, or by using the Save or Validate options.

Policy Conditions

Policy Conditions						
3 YR F/R Policy	Multistate Policy	Interstate Policy	Estimated Audit Code	Retro Policy	Canceled Mid-Term	MCO Indicator
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The “Policy Conditions” contain the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
3 YR F/R Policy	Three-Year Fixed Rate Policy Indicator	Check if applicable
Multistate Policy	Multistate Policy Indicator	Check if applicable
Interstate Policy	Interstate Rated Policy Indicator	Check if applicable
Estimated Audit Code	Estimated Audit Code	Defaults to "N"
Retro Policy	Retrospective Rated Policy Indicator	Check if applicable
Canceled Mid-Term	Cancelled Mid-Term Policy Indicator	Check if applicable
MCO Indicator	Manage Care Organization (MCO) Policy	Check if applicable

Policy Type ID

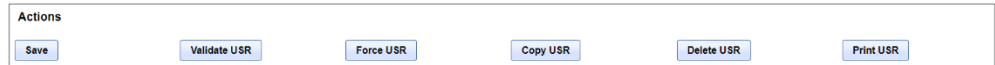
Policy Type ID		
Coverage Type 01-Standard	Plan Indicator 01-Voluntary	Non Standard Type 01-Non-Standard Code does not apply
Deductible Type 00-No Deductible		00-No Deductible
Deductible % 00	Ded. Claim / Accident 00000000	Ded. Amt. Aggregate 00000000

The “Policy Type ID” section contains the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Coverage Type	Type of Coverage ID Code	Dropdown - Defaults to “01-Standard Policy”
Plan Indicator	Type of Plan ID Code	Dropdown - Defaults to “01-Voluntary”
Non Standard Type	Type of Non-Standard ID Code	Dropdown - Defaults to “01-Non-Standard Code does not apply”
Deductible Type	Losses Subject to Deductible Code	Dropdown - Defaults to “00-No Deductible”
Unlabeled	Basis of Deductible Calculation Code	Dropdown - Defaults to “00-No Deductible”
Deductible %	Deductible Percentage	Defaults to “00”
Ded. Claim / Accident	Deductible Amount per Claim / Accident	Defaults to all zeroes
Ded. Amt. Aggregate	Deductible Amount – Aggregate	Defaults to all zeroes

Option Buttons

At the bottom of the page you have several options. Clicking on a given option will perform a specific function. These options include:



Save – Preserves the data entered on the page.

Validate USR – Saves the data entered and performs validations on the data.

Force USR - Forces a USR, which has not been submitted, to an edit status of “Passed”.

- Note: Use of the “Force USR” button is determined by the “DCO Exposure State”. Contact DCO for their reporting requirements.

Copy USR – Copies the current USR based upon the copy USR selection to a newly created USR and opens the USR for modification as a Correction, Replacement, or Subsequent Report.

Delete USR – Permanently deletes the USR from BEEP. BEEP will ask for confirmation before deleting a USR. USRs that have been submitted cannot be deleted.

Print USR – Displays the data in the standard USR format to be printed using the User’s workstation print function.

When navigating between the USR pages, data entered on any page is retained and will be displayed when returning to that page.

If you select another function (i.e. leave the USR), the system will not save any data that was not saved by navigating to a new page within the USR, or by using the Save or Validate options.

Exposure Info

Exposures - UNEDITED			
Header	Exposures	Losses	Loss Totals
Link Data			
Report #: 01	Corr Ind: 00	Carrier ID: 96001	
Policy #: WCTEST	Policy Eff Date: 01/01/16	State: 31	
Card Serial #:			

Navigating to the “Exposures” page, you will notice the “Link Data” at the top of the page.

Split Indicators

To begin the data entry process, you will need to click on either “Default Dates” or “Add New Split”.

Split Indicators
<input type="button" value="Default Dates"/> <input type="button" value="Add New Split"/> <input type="checkbox"/> Totals Override

If the USR you are entering does not have split exposures, click on “Default Dates”. The system will add the “Mod Effective Date” and “Rate Effective Date” fields and set them to equal the “Policy Effective Date”. Next, enter all the exposure detail for the USR.

Split Indicators
* Split: 0 Mod Effective Date: 04/29/17 Rate Effective Date: 04/29/17 <input type="button" value="Delete"/> <input type="checkbox"/> Totals Override
<input type="button" value="Default Dates"/> <input type="button" value="Add New Split"/>

If the USR you are entering does have split exposures, click on “Default Dates” (which is the “Policy Effective Date”) for the first split. Next, enter all the “Exposure Detail” for the first split period. Then click on “Add New Split” and you will be navigated to the “Add Split” page. Enter the “Mod Effective Date” and “Rate Effective Date” for the split and click “Save New Split”. Then enter the exposure detail for each additional split period.

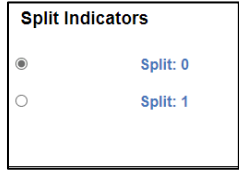
You also have the option of clicking on “Add New Split” to add your own dates for each period.

Note: You cannot insert a split between two existing splits.

To cancel adding a split and return to the “Exposures” page, click on “Cancel”.

Add Split	
Split Period:	1
Mod Effective Date (MMDDYY):	<input type="text"/>
Rate Effective Date (MMDDYY):	<input type="text"/>
<input type="button" value="Cancel"/>	<input type="button" value="Save New Split"/>

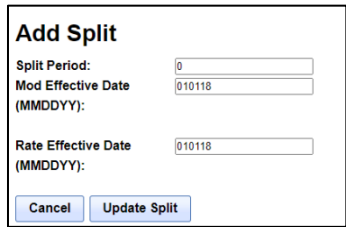
Clicking on the “Split:” allows you to view or update the dates for that split.



A dialog box titled "Split Indicators" with two radio button options. The first option is "Split: 0" with a selected radio button. The second option is "Split: 1" with an unselected radio button.

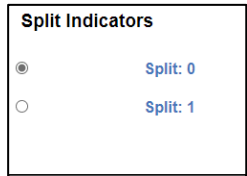
Once you have made your changes, click “Update Split”.

If you click “Cancel”, the dates default back to the original dates.



A dialog box titled "Add Split" with three input fields and two buttons. The fields are: "Split Period:" with value "0", "Mod Effective Date (MMDDYY):" with value "010118", and "Rate Effective Date (MMDDYY):" with value "010118". The buttons are "Cancel" and "Update Split".

Clicking on the circle “O” allows you to view, enter, or update the “Exposure Details” for that split period in each of the “Exposure Detail” sections.

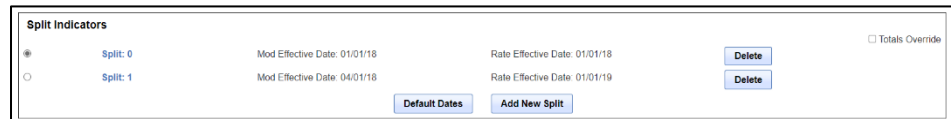


A dialog box titled "Split Indicators" with two radio button options. The first option is "Split: 0" with a selected radio button. The second option is "Split: 1" with an unselected radio button.

Each split’s “Exposure Detail” section displays the calculation of that split’s “Subject Premium Amount”. All split “Subject Premium Total Amounts” are then added together to create the “Unit Total Subject Premium Amount” that is reported on the “Totals Record”. These automated calculations are only done on First Reports.

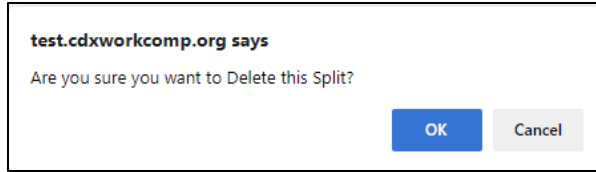
Split numbers increase by one each time “Add New Split” is clicked.

To delete a split, click on “Delete” next to the split you want removed. If only one split is present, it cannot be deleted.



A dialog box titled "Split Indicators" showing two split entries. The first entry is "Split: 0" with "Mod Effective Date: 01/01/18" and "Rate Effective Date: 01/01/18". The second entry is "Split: 1" with "Mod Effective Date: 04/01/18" and "Rate Effective Date: 01/01/19". There are "Delete" buttons next to each split. At the bottom, there are "Default Dates" and "Add New Split" buttons. A "Totals Override" checkbox is in the top right corner.

You will be asked to confirm the delete.



Note: Deleting a split will also delete all related exposure records from the USR.

Totals Override

BEEP only calculates Totals on First Reports. This option is not available on subsequent reports. On First Reports, you can elect to override the totals calculation and enter data manually by selecting the “Totals Override” checkbox.

The “Totals Override” checkbox controls whether BEEP calculates totals on the “Exposures” page.

If it is checked, BEEP does not calculate Exposure or Premium Totals, making it your responsibility to enter them correctly. It is the user’s responsibility to accurately calculate all total amounts on Correction and Subsequent Reports prior to submitting them.

If it is unchecked, BEEP calculates the Exposure and Premium Totals, and you cannot manually enter them.

Exposure Detail (Subject to Experience Rating)

The next section is the “Exposure Detail (subject to experience rating)”, where you will enter the first Exposure Record for a Class Code that is “subject to experience rating”.

To enter additional Exposure Records, click on “Add Exposure” and the system will then add a new row in which you can enter the additional exposure detail.

The “Exposure Detail (subject to experience rating)” contains the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Update Type	Update Type Code	Dropdown

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Exposure Coverage	Exposure Act / Exposure Coverage Code	Defaults to "01"
Class Code	Classification Code	Defaults to all zeroes
Exposure Amount	Exposure Amount	Defaults to all zeroes No decimal point
Manual Rate (XXX.XXX)	Manual / Charged Rate	Defaults to all zeroes Enter a decimal point
Premium Amount	Premium Amount	Defaults to all zeroes No decimal point
Unit Subject Premium	Subject Premium Total	Defaults to all zeroes
Total Subject Premium	Total Subject Premium	Defaults to all zeroes
Experience Mod (X.XXX)	Experience Modification Factor	Defaults to all zeroes Enter a decimal point
Total Modified Premium	Standard Premium Total	Defaults to all zeroes

Additional Notes regarding the above data elements:

Update Type - The "Exposure State" entered will determine which "Update Type Codes" are available. Codes "P" and "R" are applicable to all DCOs. Some DCOs also allow the use of codes "A", "C" and "D". On original First Reports, the "Update Type" defaults to "R".

Class Code - Enter the appropriate four-digit class code. Class Codes 993 and 9880 are entered as 0993 and 9880, respectively.

Exposure Amount - If the "Exposure Amount" represents a per capita or population exposure, enter it multiplied by ten (i.e., an exposure of 1.0 would be entered as 10). The system will automatically print per capita exposures with a decimal point on hard copy units.

Unit Subject Premium - This field will automatically calculate once all split period's exposure details have been entered. Once each split period's subject premium has been calculated, you can click on "Calculate".

Total Subject Premium – This field will automatically calculate once you click on "Calculate". This field is a per-split value that BEEP displays for your convenience but is not part of the WCSTAT USR data. WCSTAT USR data contains "Unit Subject Premium", which on First Reports, BEEP calculates using the per-split "Total Subject Premiums".

Note: You can only enter values in the "Unit Subject Premium" and "Total Subject Premium" fields if you have checked the "Totals Override" checkbox in the "Split Indicators" grid. For Corrections and Subsequent Reports, the totals must be calculated and entered by you.

If you import a First Report that contains split periods, BEEP recalculates

and displays the “Total Subject Premium” for each split period. When more than one split period exists, the “Calculate” function must be chosen on the last split period’s “Exposure Detail” page for all splits to be included in the calculated totals.

Experience Mod - Once entered, when clicking on “Calculate”, BEEP will calculate the “Total Subject Premium” and the “Total Modified Premium”, assuming the “Totals Override” checkbox has not been checked.

Total Modified Premium - This field will automatically calculate once the “Experience Mod” has been entered and you click on “Calculate”. You can only enter a value in this field if you have checked the “Totals Override” checkbox in the “Split Indicators” grid.

Clicking on “Add New Exposure”:

Exposure Detail (subject to experience rating)						
Update Type	Exposure Coverage	Class Code	Exposure Amount	Manual Rate (XXX.XXX)	Premium Amount	
R v	01	881C	0001251250	0000.250	000003128	Delete
R v	01	8742	0001350000	0001.250	000016875	Delete
Add Exposure						
Unit Subject Premium 0000020003					Total Subject Premium 0000020003	
					Experience Mod(X.XXX) 0.000	Calculate
					Total Modified Premium 0000020003	

An “Exposure Record” on an un-submitted USR can be deleted by clicking on “Delete” next to the exposure record.

Exposure Detail (Not Subject to Experience Rating)

This section contains information on exposures that are not subject to experience modification. The fields have the same definition as those defined above in the “Exposure Detail (subject to experience rating)” section.

Exposure Detail (not subject to experience rating)					
Update Type	Class Code	Exposure Amount	Manual Rate (XXX.XXX)	Premium Amount	
R v	8887	0000000000	0000.000	000001873	Delete
R v	9034	0000000000	0000.000	000000237	Delete
Add Exposure					
Total Standard Exposure 00002479701			Total Standard Premium 0000003803		
Calculate					

Clicking on “Calculate” calculates the totals in both the “subject to experience rating” and the “not subject to experience rating” areas. You can only enter values in these fields if the “Totals Override” checkbox is checked.

Non Standard Class Codes

This section contains information on premiums for non-standard class codes.

Non Standard Class Codes					
Update Type	Class Code	Exposure Amount	Manual Rate (XXX.XXX)	Premium Amount	
R v	9000	0000000000	0000.000	000000000	Delete
Add Exposure					

Note: For issues concerning unrecognized non-standard class codes, the user should contact the DCO or CDX Central Support immediately because BEEP class code table updates may be required.

When there are no other exposures to enter, BEEP will save the current exposures entered when you click on “Save” or navigate to another page.

Actions					
Save	Validate USR	Force USR	Copy USR	Delete USR	Print USR

Loss Info

Once all the exposure information has been entered, click on “Losses” to navigate to the “Loss Info” page. You will see the “Link Data” at the top of the page.

Loss Info - UNEDITED			
Header	Exposures	Losses	Loss Totals
Link Data			
Report #: 01	Corr Ind: 00	Carrier ID: 96001	
Policy #: WCTEST	Policy Eff Date: 01/01/18	State: 31	
Card Serial #:			

The “Loss Info” page displays the loss information data fields for the USR. There are two sections on the “Loss Info” page—the “Loss Detail” section and a “Summary of All Losses” section.

Add New Loss		Save	Validate USR	Force USR				
Summary of All Losses								
Claim Search: <input type="text"/>				Show [100] entries				
Upd Type	Claim Number	Acc. Date	No. Claims	Incurred Indemnity	Incurred Medical	Class	Injury	Status
No data available in table								
							Previous	Next
Actions								
Copy USR		Delete USR		Print USR				

To add a loss, click on “Add New Loss” in the Loss Detail section.

[Add New Loss](#) BEEP will then display the “Loss Detail” and “Loss Conditions” sections for entry of the loss data.

Loss Detail

Loss Detail	Claim Number	Acc. Date (MMDDYY)	Claim Count	Incurred Indemnity	Incurred Medical
Upd Type [R] ▾	<input type="text"/>	[000000]	[000] ▾	[000000000]	[000000000]
Class Code [0000] ▾		Injury <input type="text"/>		Status [0-Opened] ▾	

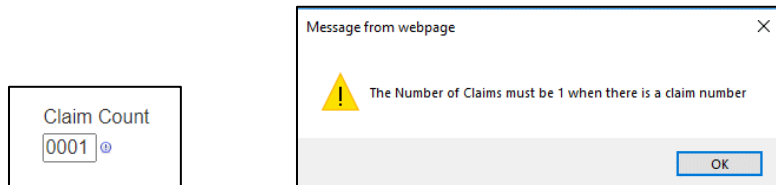
The “Loss Detail” contains the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Upd Type	Update Type Code	Dropdown

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Claim Number	Claim Number	Unique number that identifies the claim
Acc. Date (MMDDYY)	Accident Date	MMDDYY Defaults to all zeroes
Claim Count	Claim Count	Defaults to all zeroes
Incurred Indemnity	Incurred Indemnity Amount	Defaults to all zeroes
Incurred Medical	Incurred Medical Amount	Defaults to all zeroes
Class Code	Classification Code	Defaults to all zeroes
Injury	Injury Code (Injury Type)	Dropdown
Status	Claim / Status Code	Dropdown defaults to "O-Open"

Upd Type - The "Exposure State" entered will determine which Update Type Codes are available. Codes "P" and "R" are applicable to all DCOs. Some DCOs also allow the use of codes "A", "C" and "D". On original First Reports, the update type defaults to "R".

Claim Count - The number of claims must be "1" when entering a claim. Check with the DCO—most no longer accept grouped claims.



Loss Conditions

Loss Conditions			
ACT [01-State Act]	Type of Loss [01-Trauma]	Recovery [01-No Recovery]	Recovery Date (MMDDYYYY) [00000000]
Settlement [00-Claim not subject to Settlement]	Claim [01-Worker's Compensation only]	Jurisdiction / State [00]	MCO Type [00-Not Approved MCO]
Part [00]	Nature [00]	Social Security Number [0000000000]	Cause [00]
Occupation Description []	Vec <input type="checkbox"/>	Lump <input type="checkbox"/>	Fraud [00-Not Fraudulent]
Paid Indemnity [0000000000]	Paid Medical [0000000000]	Claimant Attorney Fees [0000000000]	Employer's Attorney Fees [0000000000]
Deductible Reimbursement [0000000000]	ALAE Paid [0000000000]	ALAE Incurred [0000000000]	Case Number Assigned By State []
Weekly Wage Amount [000000]	Scheduled Indemnity (Percent Disability) [000]	Vocational Rehab Incurred [0000000000]	Gross Incurred [0000000000]
<input type="button" value="Add New Loss"/>	<input type="button" value="Save"/>	<input type="button" value="Validate USR"/>	<input type="button" value="Force USR"/>

The “Loss Conditions” contain the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
ACT	Exposure Act / Exposure Coverage Code	Dropdown - Defaults to “01-State Act of Federal Act Excluding USL&HW and Federal Mine Safety and Health Act”
Types of Loss	Type of Loss Code	Dropdown – Defaults to “01-Trama”
Recovery	Type of Recovery Code	Dropdown – Defaults to “01-No Recovery”
Recovery Date (MMDDYYYY)	Recovery Date	Defaults to zeros
Claim	Type of Claim Code	Dropdown – Defaults to “01-Worker’s Compensation only”
Settlement	Type of Settlement Code	Dropdown – Defaults to “00-Claim not subject to Settlement”
Jurisdiction / State	Jurisdiction State Code	Dropdown – Defaults to zeroes
Cat #	Catastrophe Number	Defaults to all zeroes
MCO Type	Managed Care Organization Type Code	Dropdown – Defaults to “00-Not administered by MCO”
Social Security Number		No longer reported for all DCOs.
Part	Part of Body Code	Dropdown – Defaults to zeroes
Nature	Nature of Injury Code	Dropdown – Defaults to zeroes
Cause	Cause of Injury Code	Dropdown – Defaults to zeroes
Occupation Description	Occupation Description	
Voc	Vocational Rehabilitation Indicator	Check box if applicable
Lump	Lump Sum Indicator	Check box if applicable
Fraud	Fraudulent Claim Code	Dropdown – Defaults to “00-Not Fraudulent”
Paid Indemnity	Paid Indemnity Amount	Defaults to all zeroes
Paid Medical	Paid Medical Amount	Defaults to all zeroes
Claimant Attorney Fees	Claimant’s Attorney Fees Incurred Amount	

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Employer's Attorney Fees	Employer's Attorney Fee Incurred Amount	
Deductible Reimbursement	Deductible Reimbursement Amount	Check with DCO on requirements
ALAE Paid	Paid Allocated Loss Adjustment Expense (ALAE) Amount	
ALAE Incurred	Incurred Allocated Loss Adjustment Expense (ALAE) Amount	
Case Number Assigned By State	Case Number Assigned By State	NY only

To add additional losses, click on "Add New Loss" in the "Loss Detail" section. BEEP will save the current loss entered and clear the "Loss Detail" and "Loss Conditions" sections for entry of the additional loss information.

CA Expanded Loss Info

When the "Exposure State" is CA, there are four additional loss fields which appear at the bottom of the "Loss Detail" section and on the "Summary of Losses" section.

Weekly Wage Amount 00000	Scheduled Indemnity (Percent Disability) 000	Vocational Rehab Incurred 0000000	Gross Incurred 000000000
-----------------------------	---	--------------------------------------	-----------------------------

The four additional CA only fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Weekly Wage Amount	Weekly Wage Amount	Defaults to all zeroes
Scheduled Indemnity (Percent of Disability)	Scheduled Indemnity (Percent of Disability)	Defaults to all zeroes
Vocational Rehab Incurred	Total Incurred Vocational Rehabilitation Amount	Defaults to all zeroes
Gross Incurred	Total Gross Incurred Amount	Defaults to all zeroes

When an expanded USR is printed, these fields will appear in the "Loss Info" section with each field separated by a vertical line.

Summary of Losses

The saved losses will appear in the “Summary of All Losses” section. These losses will appear in sequence by “Claim Number” regardless of the order in which they were entered.

Click on the circle “O” to the far left under the “Upd Type” to view a saved loss. A loss can be deleted by clicking on “Delete”.

Summary of All Losses										
Claim Search: <input type="text"/>										Show 100 entries
	Upd Type	Claim Number	Acc. Date	No. Claims	Incurred Indemnity	Incurred Medical	Class	Injury	Status	
<input type="radio"/>	R	CLAIM1	011117	0001	000000000	00000309	8810	06-Medical Only	1-Closed	Delete
<input checked="" type="radio"/>	R	claim2	030117	0001	000000000	00000050	8810	06-Medical Only	1-Closed	Delete

When there are no more losses to enter, BEEP will save the current loss entered when you click on “Loss Totals” or navigate to another page.

Loss Totals Info

Loss Totals - UNEDITED			
Link Data			
Report #:	01	Corr Ind:	00
Policy #:	WCTEST	Policy Eff Date:	01/01/18
Card Serial #:		Carrier ID:	96001
		State:	31

The “Loss Totals” page displays a totals summary of all the loss information for the USR that has been entered on the “Loss Info” page.

Summary of All Losses

Summary of All Losses					
					<input type="checkbox"/> Totals Override
Total Claims	Total Incurred Indemnity		Total Incurred Medical		
000000	0000000000		0000000000		
Total Paid Indemnity	Total Paid Medical	Total Claimant Attorney Fees	Total Employer's Attorney Fees	Total ALAE Paid	Total ALAE Incurred
0000000000	0000000000	0000000000	0000000000	0000000000	0000000000
Actions					
Close Totals			Calculate Totals		

The “Summary of All Losses” contains the following data fields:

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Total Claims	Claim Count Total	Defaults to all zeroes
Total Incurred Indemnity	Incurred Indemnity Amount Total	Defaults to all zeroes
Total Incurred Medical	Incurred Medical Amount Total	Defaults to all zeroes
Total Paid Indemnity	Paid Indemnity Amount Total	Defaults to all zeroes
Total Paid Medical	Paid Medical Amount Total	Defaults to all zeroes
Total Claimant Attorney Fees	Claimant's Attorney Fees Incurred Amount Total	Defaults to all zeroes

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Total Employer's Attorney Fees	Employer's Attorney Fees Incurred Amount Total	Defaults to all zeroes
Total ALAE Paid	Paid Allocated Loss Adjustment Expense (ALAE) Amount Total	Defaults to all zeroes
Total ALAE Incurred	Incurred Allocated Loss Adjustment Expense (ALAE) Amount Total	Defaults to all zeroes

When the USR is a manually entered original First Report, all totals are automatically calculated when you click on "Calculate Totals".

If you want to override the automatically calculated totals and enter different information, click on the "Totals Override" checkbox. You can then enter information in the editable data fields.

"Loss Totals" should be recalculated if a claim was changed, added, or deleted on the "Loss Info" page.

Summary of All Losses Totals Override

Total Claims <input type="text" value="0000"/>	Total Incurred Indemnity <input type="text" value="000004000"/>	Total Incurred Medical <input type="text" value="0000013000"/>
---	--	---

If enabled for the DCO, you can manually enter Total Claimant Attorney Fees, Total Employer's Attorney Fees, Total ALAE Paid, and Total ALAE Incurred.

Total Paid Indemnity <input type="text" value="0000000000"/>	Total Paid Medical <input type="text" value="0000000000"/>	Total Claimant Attorney Fees <input type="text" value="0000000000"/>	Total Employer's Attorney Fees <input type="text" value="0000000000"/>	Total ALAE Paid <input type="text" value="0000000000"/>	Total ALAE Incurred <input type="text" value="0000000000"/>
---	---	---	---	--	--

Clicking on "Close Totals" navigates you back to the "Loss Info" page.

Actions

As a reminder, the "Calculate Totals" button is only available on manually entered original First Reports.

Completing the Process

There is no way to explicitly close a USR. When you are finished with the current USR, you can:

- Create a new USR by clicking on "New USR".
- Find another USR to view and/or modify by clicking on "Search".

- Once entry or modifications have started on a USR, there is no way to cancel the changes. You can modify the values back to the original values or delete the USR.

You can also click on “Log out” in the upper right corner to close the BEEP application. This is the safest way to log out because it ends the session properly.

Search

The “Search” function is used to search the BEEP database for USR information previously entered or imported into BEEP. To begin a search, click on “Search” on the BEEP menu.



This will navigate you to the “USR Search” page.

Note: The CDX retention policy is to delete any USRs that meet the following criteria:

- The most recent submission date that is older than 3 years, or
- Has not been submitted and the entry date is older than 3 years.
- The system is purged daily; thus, searches that match these criteria will not yield any results.

USR Search

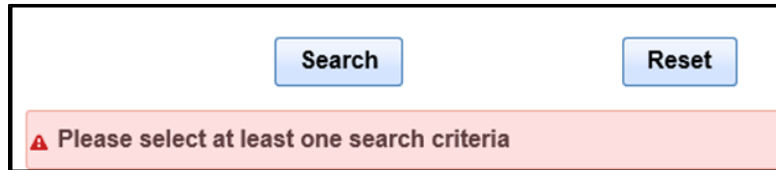
Edit Status:	All
Submission Date (MMDDYY):	<input type="text"/>
USR #:	<input type="text"/>
Date Entered (MMDDYY):	<input type="text"/>
Insured Name (Begins with):	<input type="text"/>
Policy Effective Year (YY):	<input type="text"/>
Exposure State:	All
Carrier Code:	<input type="text"/>
Policy Number:	<input type="text"/>
Separated Segment Number:	<input type="text"/>
Report Number:	<input type="text"/>
Correction Number:	<input type="text"/>
Correction Type:	All
Batch Number:	<input type="text"/>
Policy Effective Date Start (MMDDYY):	<input type="text"/>
Policy Effective Date End (MMDDYY):	<input type="text"/>
Limit results to records that will be deleted by this date (MMDDYY):	<input type="text"/>
Validation Batch:	All
Page Size:	20

The “Search” page contains the following data fields:

- Edit Status – Dropdown - Defaults to “All”
- Submission Date (MMDDYY) – Date the USR was included in a submission (not the date the submission was sent)
- USR # - Sequential number assigned by BEEP
- Date Entered (MMDDYY) – Date the USR was entered or imported into BEEP

- Insured Name (Begins with)
- Policy Effective Year (YY)
- Exposure State – Dropdown - Defaults to “All”
- Carrier Code
- Policy Number (Begins With)
- Separated Segment Number
- Report Number - Report Level Code/Report Number
- Correction Number – Correction Sequence Number
- Correction Type – Defaults to “All”
- Batch Number - Sequential number assigned by BEEP
- Policy Effective Date Start (MMDDYY)
- Policy Effective Date End (MMDDYY)
- Limit results to records that will be deleted by this date (MMDDYY)
- Validation Batch – Dropdown - Defaults to “All”
- Page Size - Dropdown – Defaults to “20”

You must enter at least one search criteria to perform a search. Clicking on “Search” without entering any criteria will result in an error.

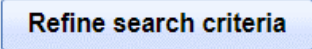



To limit the number of USRs returned, enter as much information as possible. Clicking on “Reset” will clear the search criteria fields. Once the desired search criteria have been entered, click on “Search” to perform the search and view the results.

If the search yields no results, only the search criteria are displayed. In this example, an unmatched “Policy Number” was entered.

Date Entered	USR #	Batch #	Carrier	Policy Number	Separated Segment #	Policy Eff Date	Rpt.	Corr.	Corr. Type	Edit Status	Date Submitted	St	Delete	Force
			96001	103						AP		YY		

First Previous Goto Page 0 of 0 (0 items) Next Last

You can click on “Refine search criteria”  to return to the “USR Search” page to edit the search criteria. Then click on “Search” to perform the new search.

The “USR Search Results” page displays all the USRs that match the search criteria entered. You will notice some of the header row columns have a set of arrows. Clicking on the arrows  changes the sort order and can aid in searching for a particular USR within the grid. You can also enter specific data into the data entry field under that column’s header row, such as a “Policy Eff Date”, and click “Enter” on your keyboard to search for all USRs with that effective date.

Search criteria can be entered in one or more columns at a time. To clear the data entry field, delete your entry and perform a new search.

Refine search criteria		Validate Selected USRs		Archive Selected USRs		Delete Selected USRs		Print Selected USRs					
Date Ent...	USR #	Batch #	Car...	Policy Number	Separated Seg...	Policy Eff Da...	Rpt...	Corr...	Edit Status	Date Submitted	St	Delete	Force
<input checked="" type="checkbox"/>			96001						All		NY		
<input type="checkbox"/>	09/26/2019	14447352	0	96001	TESTING	01/01/2016	01	01	H	PASSED	NY	Delete	Force
<input type="checkbox"/>	09/23/2019	14447349	0	96001	TEST456	04/29/2016	01	00		PASSED	NY	Delete	Force
<input type="checkbox"/>	09/20/2019	14447348	0	96001	TEST123	01/01/2017	01	00		FAILED	NY	Delete	Force
<input type="checkbox"/>	03/21/2019	14447111	3	96001	TESTING	08/23/2016	02	00		UNEDITED	NY	Delete	Force
<input type="checkbox"/>	03/16/2017	12889049	72	96001	TESTXLS	07/31/2011	02	02	L	PASSED	NY	Delete	Force

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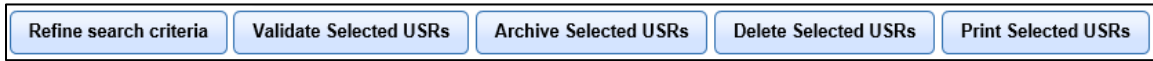
The “USR Search Results” page contains the following data fields:

- No name column above a column of checkboxes – USR checkbox selection field
- Date Entered – Date the USR was entered or imported into BEEP
- USR # - Sequential number assigned by BEEP
- Batch # - Batch Number - Sequential number assigned by BEEP
- Carrier - Carrier Code
- Policy Number
- Separated Segment # - Separated Segment Number of the Segment
- Policy Eff Date – Policy Effective Date
- Rpt. – Report Level Code/Report Number
- Corr. – Correction Sequence Number
- Corr. Type – Type of Correction
- Edit Status – USR Validation Status
- Date Submitted – The date the transaction was included in a submission.
- St – DCO Exposure State
- Delete - Button used to delete a USR which has not been submitted
- Force – Button used to force a USR, which has not been submitted, to an edit status of “Passed”.
 - **Note:** Use of the “Force” button is determined by the “DCO Exposure State”. Contact DCO for their reporting requirements.

The rest of this section will explain each of the features available on the “USR Search

Results” page.

“Refine search criteria” was described above.



Validate Selected USRs

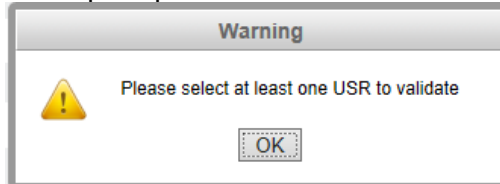
You can choose to validate one or multiple USRs by clicking in the checkboxes in the first column (USR selection checkbox column) on the search results page, then click on “Validate Selected USRs” at the top of the page.



To select all USRs, click the checkmark at the top of the USR selection checkbox column.



If you do not select any USR selection checkboxes, and click on “Validate Selected USRs”, you will be prompted to select at least one USR to validate.



For more information on validations, see the [“Validating USR”](#) section of this guide.

Archive Selected USRs

Archiving allows the Insurer to save USRs in their own system. These USRs can be imported back into BEEP if needed. Insurers need to develop their own protocol for how they want USR information saved and instruct their Users accordingly.

Note: CDX strongly encourages you to periodically archive USRs. The CDX retention policy is to delete any USRs that meet the following criteria:

- Have a most recent submission date that is older than 3 years, or
- Have not been submitted and have an entry date older than 3 years.
- Searches that match these criteria will not yield any results.

You can choose to archive one or multiple USRs by clicking in the checkboxes in the USR selection checkbox column on the search results page then click on “Archive Selected USRs” at the top of the page.

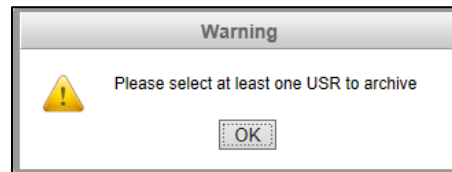
Archive Selected USRs

To select all USRs, click the checkmark at the top of the USR selection checkbox



column.

If you do not select any USR selection checkboxes and click on “Archive Selected USRs”, you will be prompted to select at least one USR to archive.

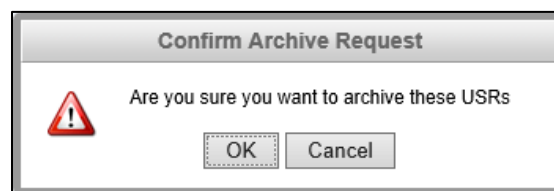


Once the USRs for archiving have been selected, and you have clicked on “Archive Selected USRs”, you will be navigated to the “Confirm Archive Request” page. This page notifies you that the listed USRs will be archived.

Date Entered	USR #	Batch #	Carrier	Policy Number	Policy Eff Date	Rpt	Corr	Edit Status	Date Submitted	St
02/05/2020	14447996	0	96001	tes90	01/01/2017	01	00	PASSED		NY

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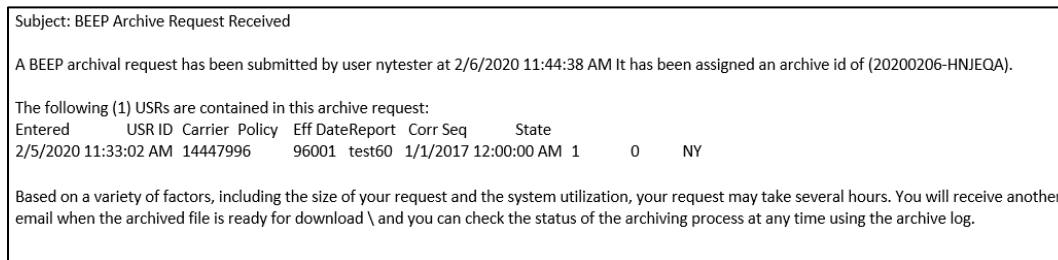
You will then receive a pop-up asking you to confirm or cancel the archive request.



This will initiate your archive request and remove those USRs from the BEEP database. You will then be navigated to the “USR Archive Request Submitted” page, letting you know the selected USRs have been submitted for archiving.



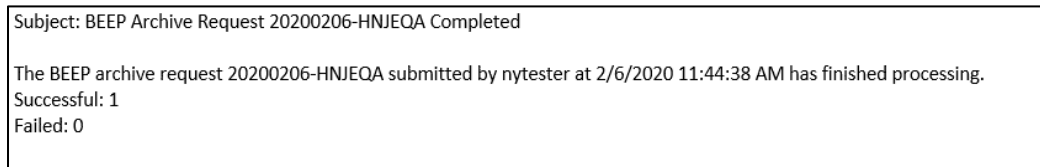
You will receive two emails. The first email is to let you know the archive request that you submitted has been received.



The first email will include:

- User ID that requested the archive
- Date and Time of the request
- Archive ID number - unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- A list of the USRs included in the request

The second email will indicate that the archive request has been completed.



This email will indicate the number of USRs that were successfully archived, as well as the number of USRs that did not archive.

The USRs that have been archived, or are scheduled for archiving, will be deleted from the BEEP database and will no longer be displayed on the “USR Search Results” page.

If the archiving process fails, or is cancelled, the USRs will become active in BEEP again.

For more information on viewing archived USRs, see the “Archive Log” section.

Delete Selected USRs

There are two different methods for deleting one or multiple USRs that have not been submitted.

1 – You can click on “Delete” under the Delete column of a USR which has not been submitted.

2 – You can select one or multiple USRs by clicking in the checkboxes in the USR selection checkbox column on the search results page, then click on “Delete Selected USRs” at the top of the page.

A blue rectangular button with rounded corners and a white border. The text "Delete Selected USRs" is centered in a bold, black, sans-serif font.

As a reminder, USRs that have not been submitted can also be deleted from the USR “Header”, “Exposures”, or “Loss Info” pages.

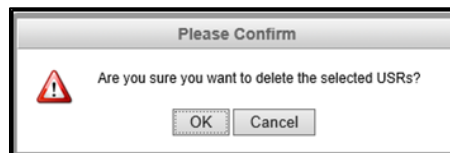
To select all USRs, click the checkmark at the top of the USR selection checkbox column.



If you do not select any USR selection checkboxes, and click on “Delete Selected USRs”, you will be prompted to select at least one USR to delete.



Once the USRs for deletion have been selected, and you have clicked on “Delete Selected USRs”, a pop-up box will appear asking you to confirm or cancel the delete request.



Clicking “OK”, will initiate the deletion request and remove those USRs from the BEEP database.

You may see the flash of a dialog box stating, “Deleting USR” to indicate the deletion is in process.

Note: Once USRs are deleted from the BEEP system, they cannot be recovered.

Note: Submitted USRs cannot be “Deleted”, “Forced”, or updated in any way.

Print Selected USRs

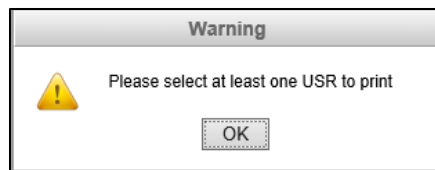
You can choose to print one or multiple USRs by clicking in the checkboxes in the USR selection checkbox column on the search results page, then click on “Print Selected USRs” at the top of the page.

Print Selected USRs

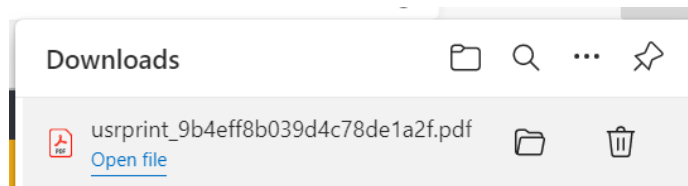
To select all USRs, click the checkmark at the top of the USR selection checkbox column.



If you do not select any USR selection checkboxes, and click on “Print Selected USRs”, you will be prompted to select at least one USR to print.

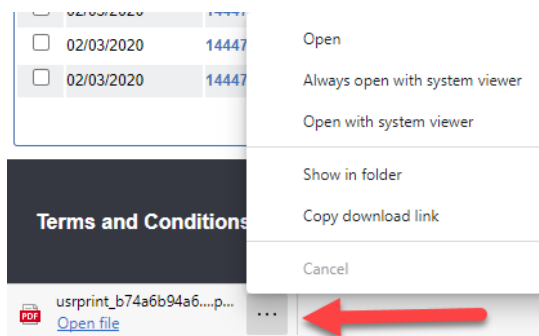


Once the USRs for printing have been selected, and you have clicked on “Print Selected USRs”, a pop-up will ask if you want to “Open file”, “Download” the PDF, or “Delete file”.



Clicking on “Open file” opens a PDF of the USR.

Depending on the web browser you're using you might see this message with the following choices.



View or Modify a USR

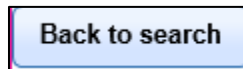
Refine search criteria		Validate Selected USRs	Archive Selected USRs	Delete Selected USRs	Print Selected USRs										
	Date Entered	USR #	Batch #	Carrier	Policy Number	Superseded Segment #	Policy Eff Date	Rpt.	Corr.	Corr. Type	Edit Status	Date Submitted	SI	Delete	Force
<input type="checkbox"/>	10/11/2019	14447354	0	96001	test		01/01/2017	01	00		UNEDITED		NY	Delete	Force
<input type="checkbox"/>	09/26/2019	14447352	0	96001	TESTING		01/01/2016	01	00		UNEDITED		NY	Delete	Force
<input type="checkbox"/>	09/23/2019	14447349	0	96001	TEST456		04/20/2016	01	00		PASSED		NY	Delete	Force
<input type="checkbox"/>	09/20/2019	14447348	0	96001	TEST123		01/01/2017	01	00		FAILED		NY	Delete	Force
<input type="checkbox"/>	03/21/2019	14447111	3	96001	TESTING		08/23/2016	02	00		UNEDITED		NY	Delete	Force
<input type="checkbox"/>	03/16/2017	12909049	72	96001	TESTXOLS		07/31/2011	02	02	L	PASSED		NY	Delete	Force

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To view the details of a specific USR, click on the USR number under the “USR #” column. This will navigate you to the “Header” page of that USR. If the USR has not been submitted, you can then make changes to the USR, save it, and re-validate it.


Once a USR has been submitted, clicking on the “USR #” will still navigate you to the “Header” page of that USR, but you will not be able to modify the USR.

Clicking on “Back to Search” on the “Header” page navigates you back to the search results page.



To modify a USR that has been “Submitted” or “Forced”, see the “Corrections, Replacements, and Subsequent Reports” section to make a correction or replacement USR.

Exporting Search Results

If you want to export the search results page into an Excel spreadsheet, click on the paper  icon in the lower right corner of the grid to initiate download.

Once the file is created, your browser will display the file for download. The download behavior varies by browser type.

The spreadsheet not only produces an Excel copy of the search results page, it also includes an “Error Count”.

The report has been split into two sections for better viewing of the details.

Id	DateEntered	Batch Number	Carrier	Policy Number	Policy Effective Date	Report Level	Correction Sequence	Edit Status
14447352	9/26/2019 15:17	0	96001	TESTING	160101	1	0	UNEDITED
14447349	9/23/2019 15:03	0	96001	TEST456	160429	1	0	PASSED
14447348	9/20/2019 14:07	0	96001	TEST123	170101	1	0	FAILED
14436837	7/18/2018 14:01	0	96001	TESTUSECASE1	150701	1	0	UNEDITED

Date Submitted	Exposure State	Is Deletable	Is Forceable	Error Count	Selected	Correction Type	Separated Segment Number
	31	TRUE	FALSE	0	FALSE		
	31	TRUE	FALSE	0	FALSE		
	31	TRUE	FALSE	11	FALSE		
	31	TRUE	FALSE	0	FALSE		

The search results spreadsheet contains the following information:

- Id – Unique USR Number assigned by BEEP
- Date Entered – Date the USR was entered or imported into BEEP
- Batch Number - Sequential number assigned by BEEP
- Carrier – Carrier Code
- Policy Number
- Policy Effective Date
- Report Level - Report Level Code/Report Number
- Correction Sequence - Correction Sequence Number
- Edit Status
- Date Submitted – Date the USR was included in a submission file
- Exposure State - DCO Exposure State
- Is Deletable – Indicates whether the USR can be deleted
- Is Forceable - Indicates whether the USR can be forced into a “Passed” status for submission
- Error Count – Number of errors on the USRs
- Selected
- Correction Type
- Separated Segment Number
- User Name

Corrections, Replacements and Subsequent Reports

The “Link Data” contains the following data fields:

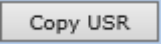
- Report Level Code / Report Number
- Correction Sequence Number
- Separated Segment Number
- Carrier Code
- Policy Number Identifier
- Policy Effective Date
- Exposure State Code

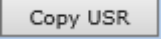
“Link Data” are required to be consistently reported for all records within the USR, and for any Corrections, Replacements, and Subsequent USRs. “Link Data” is used to keep the USRs connected for processing, storage, and identifying duplicate data.

There are two methods for creating a USR Correction, Replacement or Subsequent Report.

Method 1 – Previous USR Already in BEEP

If the previous USR is in BEEP, you can search for the USR by clicking on the “Search” link under the “BEEP” menu to find and open the USR. See the “USR Search” section for more information on searching.

Open the USR and then click on . This can be done from the “Header”, “Exposures”, or “Losses” pages.

After clicking on  there will be a pop-up asking you to select the purpose / reason for the copy. Make your selection by clicking the radio button next to the selection. Below the chosen selection are some details as to what will happen with the copy--meaning some parts of the USR may not be available. For example, if you are making a “Loss” correction, then the “Exposures” button will not be available.

Likewise, although it is not explicitly stated, you can only make Exposure corrections on a First Report.

Exposure corrections are not allowed on Subsequent Reports. The “Copy Purpose” selections:

Copy Purpose

- Exposure Correction
 - Makes a direct copy of the Header Page
 - Drops all Loss Records
 - Adds a P record for every R record on each split
 - Drops all P records that previously existed
 - Drops all Totals
- Header Correction
 - Makes a direct copy of the Header Page
 - Drops all Loss Records
 - Drops all Exposure Records
 - Drops all Totals
- Loss Correction
 - Makes a direct copy of the Header Page
 - Drops all Exposure Records
 - Adds a P record for every R type Loss
 - Drops all P records that previously existed
 - Drops all Totals
- Totals Correction
 - Makes a direct copy of the Header Page
 - Drops all Exposures
 - Drops all Losses
 - Drops all Totals
- Subsequent Report
 - Makes a direct copy of all records
 - Increments the Report Level
 - Drops all Exposure Records
 - Drops all Loss Records with Closed Claims
 - Drops all Loss P records
 - Makes a Loss P record for every Loss R record with an open claim
 - Drops all Totals
- Multiple Correction
 - Makes a direct copy of all records
 - Drops all Totals

Each purpose describes what the resulting copy of the USR will contain. The “Copy Purposes” include:

- Exposure Correction
- Header Correction
- Loss Correction
- Totals Correction
- Subsequent Report
- Multiple Correction
- Replacement Report - Refer to DCO for use of a Replacement Report
- Separated Unit - Refer to DCO for use of a Separated Unit

Once your selection has been made, click “Do Copy”. The system will copy the USR and update the “Report Number”, “Correction Indicator” and “Correction Type” based on your selection.

To cancel out of “Copy USR” click the close button, the close button will cancel your copy request.

The “Copy Purpose” selected dictates what pages and functions are available, such as, whether you can add or change exposures or losses.

If you are creating a Subsequent Report from a previous report that contained a correction indicator (Corr Ind) greater than “00”, you must change the correction indicator (Corr Ind) back to “00”.

Policy Info	
Report #	Corr Ind
<input type="text" value="03"/>	<input type="text" value="01"/>

Method 2 – Previous USR Not in BEEP

If the previous USR is not in BEEP, you will need to manually enter the Correction, Replacement or Subsequent Report by clicking the “New USR” link under the “BEEP” menu. See the “Create New USR” section for more information on how to create a USR.

If you are creating a Subsequent Report, you will need to increment the report number in the “Report #” field.

If you are creating a Replacement Report, you will need to enter “R” in the Replacement Report Indicator field, “Rep. Rpt. Ind.” field.

Rep. Rpt. Ind.
<input type="text"/>

Note: Refer to individual DCO Statistical Plan Manual for replacement report acceptance.

If you are creating a Correction Report, you will need to increment the Correction Indicator in the “Corr Ind” field and select a “Correction Type”. You will notice the “Correction Type” selected dictates what pages and functions are available, such as, whether you can add or change exposures or losses.

Correction Types

From this point, regardless of the method used (create or copy) to create the USR, the following information will be the same.

After creating a copy or a new USR, if applicable, a user must select a “Correction Type” from the dropdown.

Header - UNEDITED						
Back to Search		Separated USR		Header		Exposures
				Exposures 0		Losses
				Losses 0		Loss Totals
Policy Info						
Report #	Cont Ind	Correction Type			Rep. Rpt. Ind.	
03	01	L - Loss Record Correction(Excluding Aggravated Inequity)			<input type="checkbox"/>	
Carrier		<ul style="list-style-type: none"> F - Exposure Record Correction H - Header Record Correction (Including Link Data) H - Header Record Correction (Excluding Link Data) L - Loss Record Correction(Excluding Aggravated Inequity) M - Multiple Record Correction(Including Link Data) M - Multiple Record Correction (Excluding Link Data) T - Total Record Correction 			Policy Eff Date (MMDDYY)	Policy Exp Date (MMDDYY)
00001					063017	063018
State Eff Date						Exposure State
000000						31-NEW YORK

The Correction Types are:

- A – Loss Record Corrections due to Aggravated Inequity
- E – Exposure Record Correction
- H – Header Record Correction (Including Link Data)
- H – Header Record Correction (Excluding Link Data)
- L – Loss Record Correction (Excluding Aggravated Inequity)
- M – Multiple Record Correction (Including Link Data)
- M – Multiple Record Correction (Excluding Link Data)
- T – Total Record Correction

Note: Refer to the individual DCO Statistical Plan Manual for use of correction type “A”. This option will not be available for every DCO.

When entering a Correction Report, the “Correction Type” on the “Header” page is used in conjunction with the “Update Type Code”. The “Update Type Code” will remain blank for you to enter either “P” for Previous to indicate the old data values, or “R” for Revised to indicate the new data values.

All DCOs accept the P/R “Update Type Codes”. Some DCOs also allow the use of “A” for Add, “D” for Delete, and “C” for Change.

Header Corrections

You may correct any “Header” page data element other than the “Link Data” by entering the revised value.

For DCOs that allow Link Data changes, you may correct “Link Data” by selecting the correction type of “H – Header Record Correction (Including Link Data)” or “M – Multiple Record Correction (Including Link Data)”. The user will be required to enter the previous and revised values on the “Header” page.

Policy Info						
Report #	Corr Ind	Correction Type			Rep Rpt. Ind.	
03	01	H - Header Record Correction (Including Link Data)			<input type="checkbox"/>	
Previous Link Data						
Prev Rpt.	Prev Corr	Prev Carrier	Prev Policy #	Prev Policy Eff Date (MMDDYY)	Prev Exposure / State	
00	0	00000		000000		

Be sure to enter the previous and revised “Link Data” in the appropriate fields. The previous fields are:

- Prev Rpt – Previous Report Level Code/Report Number
- Prev Corr – Previous Correction Sequence Number
- Prev Carrier – Previous Carrier Code
- Prev Policy # - Previous Policy Number Identifier
- Prev Policy Eff Date (MMDDYY) – Previous Policy Effective Date
- Prev Exposure / State – Previous DCO Exposure State

Exposure Corrections

You can only make corrections to the “Exposures” page with a Replacement of the First Report, a Correction to the First Report, or some DCOs also allow a Replacement of a Correction to a First Report.

The “Exposures” page will display the Split Indicator details and Exposure Details. The Exposure details include the classes or codes subject to experience rating, the classes or codes not subject to experience rating and non standard class codes. The “Totals Override” checkbox will be checked and disabled; you may not uncheck it. The Previous (P) and Revised (R) rows will be created and will be editable. Enter the exposure corrections and any related changes to the “Total” fields prior to saving the Correction Report.

You are responsible for editing the data to ensure it properly reflects the appropriate report.

The USR, which results from a copy, is always set to the Unedited Status.

Note: BEEP only calculates totals on manually entered, first report, non-correction USRs. The “Totals Override” checkbox is always checked for correction and subsequent reports and for imported USRs. It is your

responsibility to accurately calculate all total amounts on correction and subsequent reports prior to submitting.

Loss Information Corrections

The “Losses” page is used to enter, view, or modify First Reports, Subsequent Reports, Replacement Reports, or Correction Reports where losses are reported.

To view or make changes to a specific claim, go to the “Summary of all losses” section towards the bottom of the “Loss Info” page and click on the radio button for that claim.

This will display the detail for that loss in the “Loss Detail” and “Loss Conditions” sections above.

Summary of All Losses										
Claim Search: <input type="text"/>										Show 100 entries
	Upd Type	Claim Number	Acc. Date	No. Claims	Incurred Indemnity	Incurred Medical	Class	Injury	Status	
<input type="radio"/>	P	17214580	112417	0001	000001560	000001080	8829	05-Temporary Injury	0-Opened	Delete
<input type="radio"/>	R	17214580	112417	0001	000000000	000000100	8829	05-Temporary Injury	1-Closed	Delete

When using the BEEP copy function to create a Subsequent Report, BEEP will ONLY copy the “Loss Records” where the “Status” is “0-Open”, “2-Reopened”, or “4-Open with no payment made” on the USR being copied. You can then add, change, or delete records for the new USR report being filed.

“Loss Records” can be deleted by clicking on “Delete” next to the loss record in the “Summary of all losses” section. Once the claim is deleted there is no way to get it back.

On the “Loss Totals” page, the “Totals Override” checkbox is always checked (and cannot be un-checked) for Correction and Subsequent Reports and for imported USRs. This page is all zero filled making it your responsibility to calculate and enter the totals correctly.

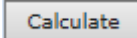
 Totals Override

Separated USR Reporting

You may create a Separated USR by selecting the Original 01-00 USR, then click on [Copy USR](#) and choose the “Copy Purpose” Separated Unit, and then click on [Do Copy](#).

Once the copy has been created, click on [Separated USR](#) link to open the Separated USR screen to enter the fields specific to the “Separated USR” being created.

BEEP Data Field Label	WCSTAT Data Element	Notes / Instructions
Separated Segment Number	Separated Segment Number	Numeric three digits. Contact your DCO for correct Separated Segment Number to be Reported.
Previous Separated Segment Number	Previous Separated Segment Number	Only applicable for correcting previously reported Separated Segments.
Separated Date	Separated Date	MMDDYY
Separated Name of Insured	Separated Name of Insured	Primary Name of Separated Segment

Next, update the “Exposures” to show only the exposure information for the “Separated Segment” being reported. The  button can be used to recalculate “Total Modified Premium” and “Total Standard Premium”.

Update the “Loss Info” to remove any losses that do not apply to the “Separated Segment” and add any late reported claims.

Repeat this process for each “Separated Segment”.

If correcting a previously reported “Separated Segment”, follow the process for a new “Separated Segment”, making sure you include the “Previous Separated Segment Number”.

Validating USRs

This section will cover the following sub-sections: “Validating Individual USRs”, “Validating from the Search Results page”, and “Forcing USRs to Passed Status”.

Both checking during entry and checking during the validation process are based on the DCO Exposure State on the USR.

Validation rules vary by DCO and the only definitive source of that information is the individual DCO’s Unit Statistical Plan Manual, or equivalent DCO approved guide. BEEP should significantly reduce erroneous USRs; however, passing the BEEP validation process is not a guarantee that the USR will be processed without error by a DCO. Likewise, failing BEEP’s validation process does not preclude that the USR will fail the edits of individual DCOs.

USRs that do not have validation errors will be placed into “Passed” status.

USRs that have validation errors will be placed into “Failed” status.

Only USRs with a “Passed” status can be submitted. For previously reported and deleted data (“Update Type Code” equal to “P”), some data field edits will be bypassed. These edits are still processed as warnings, but do not cause a USR to fail validation.

Note: For Minnesota and North Carolina data, these edits will not be bypassed on previously reported data.

All USRs must be validated and have a “Passed” status to be included in a submission file to the DCO.

Validating Individual USRs

When manually entering a USR, or after using the copy feature, the USR will have a status of unedited.

Header - UNEDITED

To begin, BEEP uses a two-stage approach to checking data.

First, BEEP verifies some of the individual data fields as you are entering the data, or when leaving one page to navigate to another page.

For example, leaving the “Policy Number” blank and trying to navigate to another page creates the following error.

Header - UNEDITED

You must enter Link Data to continue



This requires you to fix the error before going forward.

Validate USR

The second part of the BEEP validation process is the use of the button located towards the bottom of the page. The validation process checks the interactions of values between fields.

You can click on “Validate USR” at any time, meaning you can validate after entry of any of the pages, or you can validate once all the data has been entered.

In the example below, after clicking on “Validate USR”, a “USR Validation Error Report” was generated.

USR Validation Error Report						
Date Entered	Batch	USR	Result of Validation			
8/20/2019 2:07:25 PM	0	14447348	FAILED			
Carrier	Policy Number	Policy Effective Date	Report #	Correction #	Exposure State	
95001	TEST123	01/01/17	01	00	31	
Field Name	Screen	Error Message				
	USR	Exposure - Payroll Total is incorrect.				
	USR	Standard Premium Total is incorrect.				
Exposure Class: 0000: CLASSIFICATION	EXPOSURE	Not a Valid Classification code.				
Exposure Class: . CLASSIFICATION	EXPOSURE	Not a Valid Classification code.				
Exposure Class: 0000: CLASSIFICATION	EXPOSURE	Not a Valid Classification code.				
Exposure Class: 0000: CLASSIFICATION	EXPOSURE	Not a Valid Classification code.				
Exposure Class: 8809: CLASSIFICATION	EXPOSURE	Class should be subject to experience modification, and above the mod. - Refer to specific DCO Stat. Plan for further details				
Exposure Class: 8809: PREMIUM_AMOUNT	EXPOSURE	((Exposure * Rate) / 100) does not equal Premium.				
Exposure Class: PREMIUM_AMOUNT	EXPOSURE	Premium must be entered				
Exposure Class: 0000: CLASSIFICATION	EXPOSURE	Class should be subject to experience modification, and above the mod. - Refer to specific DCO Stat. Plan for further details				
Exposure Class: 0000: CLASSIFICATION	EXPOSURE	Class should be subject to experience modification, and above the mod. - Refer to specific DCO Stat. Plan for further details				

The top of the report displays the USR details including:

- Date Entered - Date the USR was entered or imported into BEEP
- Batch - Batch Number - Sequential number assigned by BEEP
- USR - Sequential number assigned by BEEP
- Result of Validation – Status of the USR
- Carrier – Carrier Code
- Policy Number
- Policy Effective Date
- Report # - Report Level Code/Report Number
- Correction # - Correction Sequence Number
- Exposure State – DCO Exposure State

The body of the report contains three columns:

- Field Name – Indicates the field in which the error occurred

- Screen – Indicates on which page the error is found
- Error Message – Explanation of the error

After reviewing the error message and returning to the USR, you will see that the field in error is now red because “Class Code” = 8809 was entered as a “Non-Standard Class Code” when it should have been entered as “Exposure Detail (Subject to Experience Rating)”.

The second example, below, is a USR with a split. After clicking on “Validate USR”, the following “USR Validation Error Report” was generated.

Although the “USR Validation Error Report” does not state which part of the split is in error, you may need to click on the second split to find the error.

In this example, the second split had one exposure record with no detail. To correct this, you can either enter the detail or delete the records.

Note: There must be at least one valid “Class Code” with detail on each split.

To fix this error, not only do you need to click on both “Calculate” options on the split pages, but you will need to click on both “Calculate” options on the main page; then click on “Validate USR” to revalidate the USR.

Calculate

As with both examples above, once the USR has been corrected you can validate the USR again by clicking on "Validate USR".

Validate USR

A "USR Validation Error Report" will be created, this time indicating the USR has passed the validation checks.

USR Validation Error Report						
<u>Date Entered</u>		<u>Batch</u>	<u>USR</u>		<u>Result of Validation</u>	
9/20/2019 2:07:25 PM		0	14447348		PASSED	
<u>Carrier</u>	<u>Policy Number</u>	<u>Policy Effective Date</u>	<u>Report #</u>	<u>Correction #</u>	<u>Exposure State</u>	
96001	TEST123	01/01/17	01	00	31	
No validation errors reported						

The USR will now have a passed status.

Header - PASSED

Validating from the Search Results Page

First navigate to the BEEP and then click the Search link to open the USR Search page and enter the search criteria. For more information on searching, see the “USR Search” section.

The search results will display all the USRs in BEEP that match the search criteria you entered.

Refine search criteria		Validate Selected USRs		Archive Selected USRs		Delete Selected USRs		Print Selected USRs						
Date En...	USR #	Batch #	Car...	Policy Number	Separated Seg...	Policy Eff Da...	R...	C...	Corr...	Edit Status	Date Submitted	St	Delete	Force
<input checked="" type="checkbox"/>			96007							All		NY		
<input type="checkbox"/>	10/03/2019	14447362	0	96001	test		01/01/2017	01	01	L	UNEDITED		NY	Delete Force
<input type="checkbox"/>	10/02/2019	14447360	6	96001	TEST202896201		10/01/1997	01	35	M	UNEDITED		NY	Delete Force
<input type="checkbox"/>	10/02/2019	14447356	2	96001	TESTX7808		01/01/2017	01	01	M	UNEDITED		NY	Delete Force
<input type="checkbox"/>	10/02/2019	14447355	2	96001	TESTX2288		03/30/2016	03	00		UNEDITED		NY	Delete Force
<input type="checkbox"/>	10/01/2019	14447354	0	96001	test		01/01/2017	01	00		PASSED		NY	Delete Force
<input type="checkbox"/>	09/26/2019	14447352	0	96001	TESTING		01/01/2016	01	01	H	PASSED		NY	Delete Force
<input type="checkbox"/>	09/23/2019	14447349	0	96001	TEST456		04/29/2016	01	00		PASSED		NY	Delete Force
<input type="checkbox"/>	09/20/2019	14447348	0	96001	TEST123		01/01/2017	01	00		PASSED		NY	Delete Force
<input type="checkbox"/>	03/21/2019	14447111	3	96001	TESTING		08/23/2016	02	00		UNEDITED		NY	Delete Force
<input type="checkbox"/>	03/16/2017	12989049	72	96001	TESTXCLS		07/31/2011	02	02	L	PASSED		NY	Delete Force

Page of 1 (10 items)

From this page, you can either validate a single USR or multiple USRs.

The simplest way to validate a single USR is to select the specific USR you want to validate, and then click on the BEEP generated number under the “USR #” column. You will then be navigated to the “Header” page for the selected USR. For more information on validating from here, see “Validating Individual USRs” above.

The next method for validating USRs from this page is a validation function that has been modified to process off-line, which is often referenced as “Offline Validation”. It is possible to use this method for one or multiple USRs.

The “Edit Status” column will display the status of the USR. You can search for a specific “Edit Status” by selecting the desired option from the dropdown box.

You can also select a subset of the USRs in the list for the validation by clicking the checkbox to the left of the specific USR(s) to be validated.



You can also select “All” of the USRs on the “USR Search Results” page by clicking on the checkmark at the top of the column. Make sure the “Edit Status” selected is “Unedited”.

Once you have selected the USRs you want to validate, click on

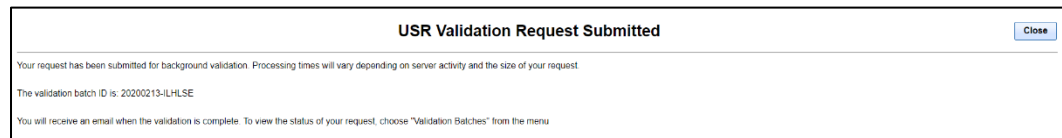
Validate Selected USRs

“Validate Selected USRs”.

If you do not select any check boxes and click on “Validate Selected USRs”, you will be prompted to select at least one USR to validate.



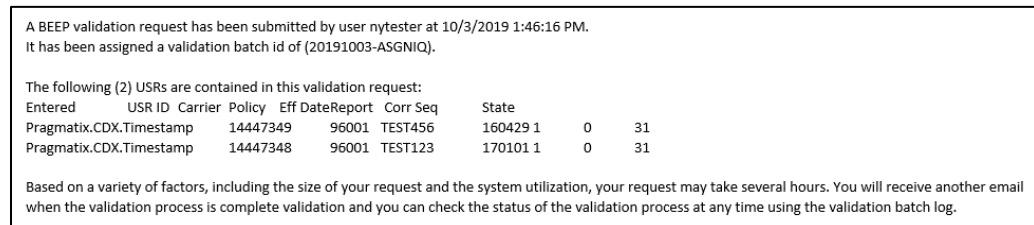
Once the USRs to be validated have been selected, and you have clicked on “Validate Selected USRs”, you will be navigated to the “USR Validation Request Submitted” page, letting you know the selected USRs have been submitted for validation.



To exit the “USR Validation Request Submitted” page, you will need to click on “Close”.

Close

You will receive two emails. The first email is to let you know your validation request has been submitted:



The first email will include:

- User that requested the validation
- Date and Time of request
- Validation Batch ID number - unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- Number of USRs in the request
- A list of the USRs included in the request

The second email will be sent when the validation request has been completed.

The BEEP validation request (20191003-ASGNIQ) submitted by nytester has finished processing.

You can view the results of the validation by refreshing the “USR Search Results” page. This can be done by clicking on “Refresh” under “View” on your browser bar, or if you have left the page, then return to the “USR Search Results” page.

Forcing USRs to a Passed Status

If a USR is in a “Failed” status, you can view the error(s) associated with that USR by clicking on “Failed” for that USR.

Refine search criteria															Validate Selected USRs			Archive Selected USRs			Delete Selected USRs			Print Selected USRs		
State Entered	USR #	Batch #	Carrier	Policy Number	Separated Segment #	Policy Eff Date	Rpt.	Corr.	Corr. Type	Est Status	Date Submitted	St	Delete	Force												
✓	12/01/2019	14447354	0	96001	test	01/01/2017	01	00		AP		NY	Delete	Force												
<input type="checkbox"/>	05/20/2019	14447352	0	96001	TESTING	01/01/2016	01	00		UNEDITED		NY	Delete	Force												
<input type="checkbox"/>	05/23/2019	14447348	0	96001	TESTING	02/29/2016	01	00		PASSED		NY	Delete	Force												
<input type="checkbox"/>	06/20/2019	14447348	0	96001	TEST123	01/01/2017	01	00		FAILED		NY	Delete	Force												
<input type="checkbox"/>	01/21/2019	14447111	3	96001	TESTING	02/23/2016	02	00		UNEDITED		NY	Delete	Force												
<input type="checkbox"/>	03/16/2017	12058660	72	96001	TESTTOOLS	07/31/2011	02	03	L	PASSED		NY	Delete	Force												

First Previous Goto Page 1 of 1 (8 items) Next Last

You will then be navigated to the “USR Validation Error Report”.

USR Validation Error Report						
Date Entered	Batch	USR	Result of Validation			
10/2/2019 10:04:50 AM	2	14447356	FAILED			
Carrier	Policy Number	Policy Effective Date	Report #	Correction #	Exposure State	Back
96001	TESTX7808	01/01/17	01	01	31	
Field Name	Screen	Error Message				
Loss Claim - CLASSIFICATION	LOSS	Required Field must be entered				
Loss Claim - CLASSIFICATION	LOSS	Not a Valid Classification code				
Loss Claim - INJURY_CODE	LOSS	Imported value is invalid. The default value will display when viewing not the imported value				
Loss Claim - INJURY_DESC_PART	LOSS	Policies effective 01-01-05 and after require Injury Description (Part) to be completed.				
Loss Claim - INJURY_DESC_NATURE	LOSS	Policies effective 01-01-05 and after require Injury Description (Nature) to be completed.				
Loss Claim - INJURY_DESC_CAUSE	LOSS	Policies effective 01-01-05 and after require Injury Description (Cause) to be completed.				

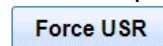
Click on “Back” on the right side of the report to return to the “USR Search Results” page.

If, after reviewing the USR, you determine the USR should be submitted with the error(s), you can “Force” a single failed USR into a “Passed” status from the “USR Search Results” page by clicking on “Force” to the right of the selected USR.



Only one USR at a time can be forced to a “Passed” status. This option must be repeated for each USR you wish to “Force” into a “Passed” status.

You can also force a single failed USR into “Passed” status by clicking on “Force USR” button while viewing the USR. This button is available on the “Header” page, the “Exposures” page, or the “Loss Info” page.



The status of the USR at the top of “Header” page, the “Exposures” page, or the “Loss Info” page will then update to “PASSED”.

Header - PASSED

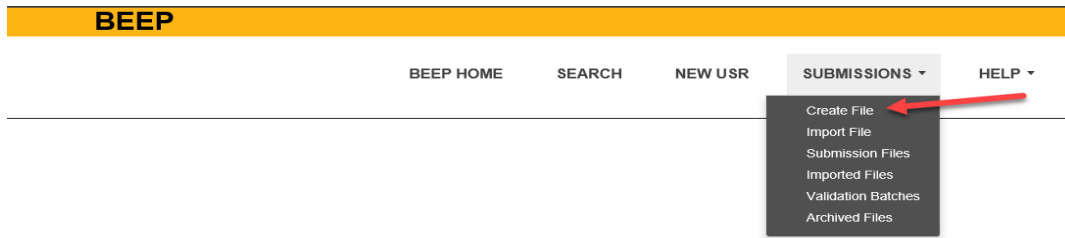
USRs that have been forced are specially tagged so that they may be monitored

by the DCO.

Note: Use of the “Force” button is determined by the “DCO Exposure State”.
Contact DCO for their reporting requirements.

Submissions

Create WCSTAT File



The “BEEP - Create File” page is used to create a submission file(s) containing USRs that have passed validation. Once created, the submission file(s) can be transmitted to the specified DCO(s).

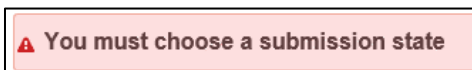
To create a submission file, click on “Create File” under the “Submissions” menu. This will navigate you to the “BEEP – Create Submission File” page. This page contains search criteria to aid in finding the USRs to be included in the submission.

A screenshot of the 'BEEP - Create Submission File' form. The form has a title 'BEEP - Create Submission File' and several input fields: 'USRs to Select' (dropdown menu with 'Passed' selected), 'Carrier' (dropdown menu with '96001' selected), 'Exposure State' (dropdown menu with 'NY' selected), 'Submission Date (MMDDYY)' (text input field), 'Date Entered (MMDDYY)' (text input field), and 'Batch' (text input field). There is a 'Continue' button at the bottom left of the form.

The “BEEP - Create Submission File” page contains the following data fields:

- **USRs to Select** – Dropdown - Defaults to “Passed” (The other choice is Passed and Submitted)
- **Carrier** – Carrier Code - Dropdown
- **Exposure State** – DCO Exposure State - Dropdown listing all Independent DCOs states and Multistate Organization
- **Submission Date (MMDDYY)** - Date the USR was included in a submission (not the date the submission was sent)
- **Date Entered (MMDDYY)** - Date the USR was entered or imported into BEEP
- **Batch** – Sequential number assigned by BEEP. Batch is used to select USRs only if “Date Entered” is not blank

You must select criteria from the three dropdowns. If you do not select a state, you will get an error message.



Once you have entered the search criteria, click on “Continue”.

This will navigate you to the “Create Submission File” results page where the search

results are displayed.

Create Submission File

File

File Status:

Output Format:

Compression:

Provider

Provider Contact Name:

Street:

City:

State / Zip: /

Phone Number / Ext.: /

Fax Number:

Email:

To submit a file, you will need to provide the following information, which is used to define the submission and generate the Electronic Transmittal Record (ETR):

File Status – Defaults to “Standard Submission” (The other choice is “Test Submission”)

Output Format – Defaults to “ASCII” (The other choice is “EBCDIC”)

Compression – Defaults to “Compressed” (The other choice is: “Uncompressed”)

Provider: Complete the following information for the Provider:

- Provider Contact Name – Carrier Name
- Street – Carrier Street Address
- City – Carrier City
- State – Carrier State
- Zip – Carrier Zip Code
- Phone Number (numeric only) – User work phone number
- Ext. – Phone Extension Number
- Fax Number (numeric only) - User work fax number
- Email – User work email address

Note: It is best to enter your work phone number and email address just in case the DCO needs to get in contact with you.

Data in the above fields is defaulted with the information in your “My Profile” under the “Profile” menu. This information may be updated. Upon successful file creation, the data in the above fields (original or updated) will be included in the file ETR (Electronic Transmittal Record). Changes to City, State, and Zip will result in automatic updates to your “My Profile”.

This information is not only used to create the electronic submission file, but also indicates where CDX emails are to be sent.


The bottom part of the “Create Submission File” results page displays a list of USRs that match the search criteria you chose:

	Date Entered	USR #	Batch #	Carrier	Policy Number	Policy Eff Date	Rpt.	Corr.	Edit Status	Date Submitted	St
<input checked="" type="checkbox"/>									All		NY
<input type="checkbox"/>	09/26/2019	14447352	0	96001	TESTING	01/01/2016	01	01	PASSED		NY
<input type="checkbox"/>	09/23/2019	14447349	0	96001	TEST456	04/29/2016	01	00	PASSED		NY
<input type="checkbox"/>	05/09/2019	14447190	0	96001			01	00	PASSED		NY


This list includes the following columns:

- **Date Entered** – Date the USR was entered or imported into BEEP
- **USR #** - Unique USR Number assigned by BEEP
- **Batch #** - Batch Number - Sequential number assigned by BEEP
- **Carrier** - Carrier Code
- **Policy Number**
- **Policy Eff Date** – Policy Effective Date
- **Rpt.** – Report Level Code/Report Number
- **Corr.** – Correction Sequence Number
- **Edit Status** – Defaults to “All”
- **Date Submitted** – Date the USR was included in the submission
- **St** – DCO Exposure State

There are three ways to search for a specific USR or a group of USRs on the “Create Submission File” results page:

1. You can sort by a specific column by clicking on the arrows  in the header row of each column to search the results based on that column.
2. You can enter search criteria into the data entry field under that column’s header row and click “Enter” on your keyboard. You can add search criteria for one or multiple columns at the same time when searching columns.
3. You can also change your results by clicking on “Refine search criteria” to change your current search criteria.

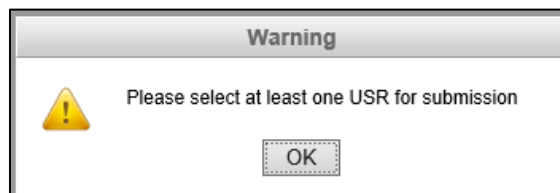
[Refine search criteria](#)

You can select “All” the USRs listed on the “Create Submission File” results page by clicking on the checkmark at the top of the first column. 

You can also select a subset of the USRs in the list to include in the submission by clicking the checkbox to the left of the specific USR.

Once you have selected the USRs you want to include in the submission, click on “Create Submission File” to create the submission file.

If you do not select any USRs, you will receive the following warning:



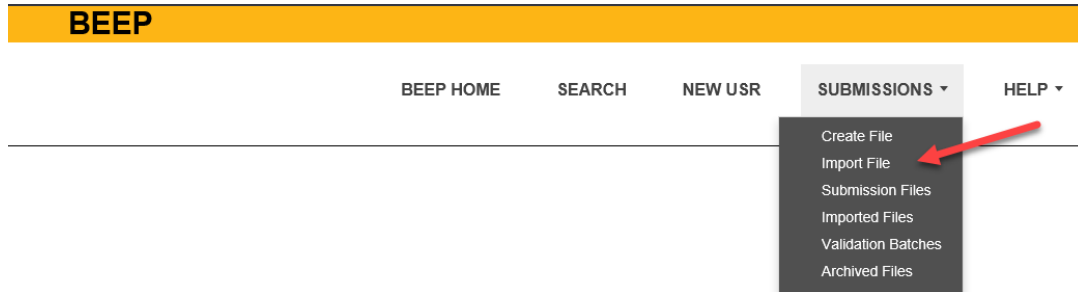
After clicking on “Create Submission File”, you will briefly see a pop-up, stating “Creating

Submission File”.

To create the submission, BEEP will validate the ETR (Electronic Transmittal Record). If validations fail, BEEP will display an error message and return you to the “Create Submission File” results page.

If validations pass, BEEP will create the submission file and automatically navigate you to the “BEEP - Submission Files” page.

Import WCSTAT File



USRs in BEEP are processed in “batches”, which are collections of USRs. If any USRs are imported, each import procedure forms a separate batch.

USRs created in the WCSTAT format can be imported into BEEP.

You can import a file directly into BEEP by clicking on “Import File” under the “Submissions” menu. This will navigate you to the “Import WCSTAT File” page.

Import WCSTAT File

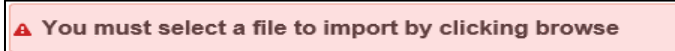
Select File for Import: No file chosen

Import as:

Instructions:
Very large files may time out during upload. If you run into this problem, you can ZIP the file to compress it.
Upload the ZIP file and the file processor will automatically unZIP it before continuing the import.
The maximum file size allowed for upload is 15MB. Files larger than 15MB should be compressed before uploading or transferred via FTP.
Only file extensions of .zip and .txt are allowed for file upload. Other extensions will no longer be accepted, such as .dat.

You can enter a file string or click on “Browse” to select a file, and then import that file into BEEP.

If you click on “Import” without selecting a file, you will receive an error message:



Click on “Browse” and then navigate to where the file(s) are stored. Select the file you wish to import by double clicking on it or single click and choose “open”. BEEP will only accept files with the extensions of “.zip” or “.txt”. Using any other extension will give you the following error message:

▲ File rejected due to being an invalid file extension.

After selecting the file, the “Browse” bar will populate with the file location. Next, select whether the file contains “New USR” or “Submitted USR”.

Click on “Import” to begin the import process.

Import WCSTAT File

Select File for Import: UBEP_9600...5LENN.TXT

Import as:

Instructions:

Very large files may time out during upload. If you run into this problem, you can ZIP the file to compress it. Upload the ZIP file and the file processor will automatically unZIP it before continuing the import. The maximum file size allowed for upload is 15MB. Files larger than 15MB should be compressed before uploading or transferred via FTP. Only file extensions of .zip and .txt are allowed for file upload. Other extensions will no longer be accepted, such as .dat.

Note: Once the import process has started it cannot be canceled.

If you are importing a large file, the system may time out during the upload process. If this happens, zip your file to compress it, then click on “Browse” and choose your Zip file. The “Browse” bar will populate with the file location (the file processor will automatically unzip your file before importing).

Click on “Import” to complete the upload process.

Once a valid file is selected, and you have clicked on “Import”, you are navigated to the “Imported WCSTAT Files” page.

Imported WCSTAT Files							
Batch	File Name	USR Count	Failed USR Count	Uploaded	Uploaded By	Errors	Validate

First Previous Goto Page 0 of 0 (0 items) Next Last

The imported file will not appear immediately in the “Imported WCSTAT Files” list. You will need to refresh the page after receiving email notification the import process has completed. You can refresh the page by either leaving the page and returning later, or by selecting “View” and then “Refresh” from your browser menu bar.

The imported file will then appear at the top of the log.

The application will send two emails. The first email indicates the file has been received by the BEEP application.

Your file has been received by the BEEP application. Processing time will vary based on system activity and the size of your uploaded file. You will receive additional notification when your file is finished processing.

File Name: UBEP_96001_C_00031_201806111037XX.txt.TXT
 Uploaded By: nytester
 File Size (bytes): 2268
 Upload Method: WEB

The first email includes:

- Name of the file
- Name of the User that uploaded the file
- File size in bytes
- Uploaded method

A second email notification will be sent when the file has been loaded into the BEEP database.

File Name: UBEP_96001_C_00031_201806111037XX.txt.TXT
 Uploaded By: nytester
 Valid USRS: 1
 Failed USRS: 0
 Batch ID: 2

 No error messages were generated while processing this file

The second email includes:

- Name of the File
- Name of the User that uploaded the file
- Number of Valid USRs
- Number of Failed USRs
- Batch ID - Sequential number assigned by BEEP

Imported WCSTAT Files							
Batch	File Name	USR Count	Failed... Count	Uploaded	Uploaded By	Errors	Validate
2	UBEP_96001_C_00031_201806111037XX.txt.TXT	1	0	10/03/2019 11:23:30	Rating Board Tester		Validate
6	UBET_96001_C_00031_201909231055.TXT	1	0	10/02/2019 10:05:21	Rating Board Tester		Validate
5	UBET_96001_C_00031_201908211055.TXT	1	0	10/02/2019 10:05:15	Rating Board Tester		Validate
4	UBEP_96001_C_00031_201909250653.TXT	1	0	10/02/2019 10:05:09	Rating Board Tester		Validate
3	UBEP_96001_C_00031_201806111037XX.txt.TXT	1	0	10/02/2019 10:05:04	Rating Board Tester		Validate
2	UBDP_96001C_00031_20190924181217.txt	2	0	10/02/2019 10:04:45	Rating Board Tester		Validate

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For more information regarding the “Imported WCSTAT Files”, see the “Imported Files” section.

BEEP will import USRs that contain errors, but only if it can make sense out of them.

Note: USRs are NOT validated as a part of Import. USRs that fail to import must be fixed and re-imported.

USR files imported as “Submitted USR” are assumed to have been generated by BEEP and therefore, already validated. They will have a status of “Submitted”. You will need to

copy and re-validate the USRs before they can be used to create a submission file.

USR files imported as “New USR” are assumed to be generated by a source other than BEEP and, therefore, are not validated. They will have a status of “Unedited”. These USRs must be validated before they can be used to create a submission file.

Reasons why a USR may not be imported are as follows:

1. “Header”, “Name”, “Address”, or “Total” records are duplicated within the USR.
2. The USR contains ICR (Individual Case Report) records. BEEP is not set-up to accept these records.
3. If a “Header Correction” containing “Exposure”, “Loss”, and/or “Total” records is imported, BEEP will drop the USR from the import file and post the dropped record to Import File Log. The record in the Import File Log will state that the USR was dropped and not imported. The USR link data will be available for the user and the reason why the USR was dropped will be given.
4. If a USR contains inconsistent split data (meaning a split period has a “Modification Effective Date” or “Experience Modification Factor” that is different from the rest of the “Exposure” records for that split period) it will not be imported, processed, or displayed by BEEP. BEEP will drop the USR from the import file and post the dropped record to Import File Log. The source data must be amended to resolve all inconsistent split information. Once the source data for the USR has been amended, the USR can then be re-imported into the BEEP database.

File Name: UBET_96001_C_00031_201908211055.TXT
Uploaded By: nytester
Valid USRS: 1
Failed USRS: 1
Batch ID: 3

The following error messages were generated while processing this file:

Message: USR dropped due to inconsistent split data. Please fix split information on source data and then re-import this USR.
Severity: Critical
RecordType: USR
LinkData: 960010000202896201 319710011Z

Message: Mod effective dates not consistent inside split. Found mod effective dates of "971001" and "970901"
Severity: Critical
RecordType: USR
LinkData: 960010000202896201 319710011Z

5. Imported USRs containing unrecognized non-standard “Class Codes” will error and be displayed above the “Experience Mod” section of the USR. This may result in inconsistent split data because a non-standard “Class Code” should not have an “Experience Modification Factor”.

Note: For issues concerning unrecognized non-standard “Class Codes”, contact the reporting DCO or CDX Central Support because the BEEP class code table may require an update.

Submission Files

BEEP

CDX Compensation Data Exchange

BEEP HOME SEARCH NEW USR SUBMISSIONS HELP

BEEP is used for the entry, import, editing, validating and/or submission of Unit Statistical Reports (USRs).

Available Features:
SEARCH

Create File
Import File
Submission Files
Imported Files
Validation Batches
Archived Files


Once a submission has been created, you are automatically navigated to the “BEEP Submission Files” page. The “BEEP Submission Files” page is located under the “Submissions” menu.

File Name	Date Created	State	# Records	# Units	Date Sent To CDX	Send To CDX
UBET_96001_C_00031_201908211034.TXT	08/21/2019 10:34:14	NY	4	1		Send
UBEP_96001_C_00031_201906271507.TXT	06/27/2019 03:07:57	NY	7	1		Send
UBEP_96001_C_00031_201608091617.TXT	08/09/2016 04:17:44	NY	12	1		Send

The “BEEP Submission Files Section” contains the following information:

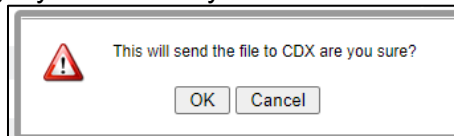
- **File Name** - Submission file name is generated by BEEP using the CDX’s file-naming convention for CDX
- **Date Created** – Date the submission was created
- **State** – DCO Exposure State – State the submission is to be sent to
- **# Records** – Number of records included in the file
- **# Units** – Number of USRs included in the file
- **Date Sent To CDX** – Date the file was submitted to the DCO
- **Send To CDX** – Button used to submit the file

There are two ways to search for a specific submission:

1. You can sort by a specific column by clicking on the arrows  in the header row of each column to search the results based on that column.
2. You can enter search criteria into the data entry field under that column’s header row and click “Enter” on your keyboard. You can add search criteria for one or multiple columns at the same time when searching columns.

A submission file is not automatically transmitted to the DCO identified under the “State” column. First, you must locate the file you wish to submit, and then click on “Send” to submit the file.

There will be a pop-up asking if you are sure you want to send the file to CDX.



After clicking “OK” you will see a brief pop-up stating, “Sending to CDX”. The date and

the time will also appear in the “Date Sent To CDX” column.

File Name	Date Created	State	# Records	# Units	Date Sent To CDX	Send To CDX
UBET_96001_C_00031_201908211055.TXT	08/21/2019 10:55:21	NY	11	1		Send
UBEP_96001_C_00031_201608021429.TXT	08/02/2016 02:29:35	NY	3	1	08/02/2016 02:29:47	Send

Note: For BEEP to submit USRs for multistate policies to the various states, a separate submission must be created for each DCO state.

Sometimes there are problems with a submission file and the file does not reach the DCO. These problems can include the following: files being lost, transmissions misdirected, or files being destroyed in process.

File Name	Date Created	State	# Records	# Units	Date Sent To CDX	Send To CDX
UBEP_96001_C_00031_201608021429.TXT	08/02/2016 02:29:35	NY	3	1	08/02/2016 02:29:47	Send

In those instances, you may resend/recreate any file within the BEEP application that was created within the past thirty days. A submission file older than thirty days is automatically deleted by the system. The recreated file will be an exact duplicate of the original submission.

To submit the file, click on “Send” as you previously did above. Again, there will be a pop-up asking if you are sure you want to send the file to CDX.

The date and the time will be updated with the new date and time under the “Date Sent To CDX” column.

If you want to view a submission file, locate the file you want to view under the “File Name” column.

File Name	Date Created	State	# Records	# Units	Date Sent To CDX	Send To CDX
UBEP_96001_C_00031_201608021429.TXT	08/02/2016 02:29:35	NY	3	1	08/02/2016 02:29:47	Send

Click on the file name of that submission to initiate download. You will see a pop-up asking if you want to “Open” or “Save” the file or you can select “Cancel”.




Once the file is created, your browser will display the file for download. The download behavior varies by browser type.”

Clicking on “open” will download file in WCSTAT format:

\$!+WORKCOMP+!\$		WCS0003119233V02T	96001R
96001123TESTXTEST	31971001171	981001	
96001123TESTXTEST	31971001172TEST		
96001123TESTXTEST	31971001174	0900 000000097100197100100000000000	
96001123TESTXTEST	31971001174	0900 000000097100197100100000000000	
96001123TESTXTEST	31971001174	8810 001000097100197100100006530410	
96001123TESTXTEST	31971001174	8810 001075097100197100100006530410	
96001123TESTXTEST	31971001174	8810 001075097100197100100056559050	
96001123TESTXTEST	31971001174	8829 001000097100197100100056559050	
96001123TESTXTEST	31971001175	8829 0001971030	6308610000
96001123TESTXTEST	31971001175	8829 0001971030	6308610000

All USR output files are formatted to the WCSTAT standards and consist of 250-byte records without record separators.

If you would like a list of the submissions contained on the “Submission File” menu, click

on paper  icon in the lower right corner to initiate a download into an Excel spreadsheet.

Once the file is created, your browser will display the file for download. The download behavior varies by browser type.”

Clicking on “Open” will display a spreadsheet of the submission files.

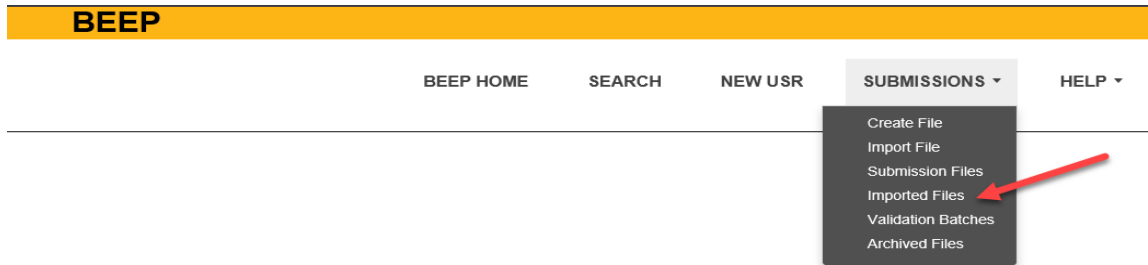
	A	B	C	D	E	F	G	H
1	Id	File Name	Created	State	Record Count	Unit Count	Date Sent To CDX	Can Send to CDX
2	835289089	UBET_96001_C_00031_201908211055.TXT	8/21/2019 10:55	NY	11	1	9/20/2019 15:32	TRUE
3	835289088	UBET_96001_C_00031_201908211034.TXT	8/21/2019 10:34	NY	4	1		TRUE
4	833454080	UBEP_96001_C_00031_201906271507.TXT	6/27/2019 15:07	NY	7	1		TRUE

The spreadsheet contains:

- Id – Unique number assigned by BEEP
- File Name – Name of the file
- Created – Date the file was created
- State – DCO Exposure State
- Record Count – Number of records contained in the file
- Unit Count - Number of USRs contained in the file
- Date Sent To CDX – Date the submission was last sent to the DCO

Can Send to CDX – Indicates file is ready for submission

Imported Files



To view the “Imported WCSTAT Files”, click on “Imported Files” under the “Submissions” menu. The “Imported WCSTAT Files” provides a list of files which display a summary of the USR data in the files that have been imported.

Note: USRs that fail to import must be fixed and then re-imported.

Imported WCSTAT Files							
Batch	File Name	USR Count	Failed... Count	Uploaded	Uploaded By	Errors	Validate
4	UBET_96001_C_00031_201908211055JS.TXT	1	0	10/03/2019 03:19:11	Rating Board Tester		Validate
3	UBET_96001_C_00031_201908211055.TXT	1	1	10/03/2019 02:59:15	Rating Board Tester	2	Validate
2	UBEP_96001_C_00031_201806111037XX.txt.TXT	1	0	10/03/2019 11:23:30	Rating Board Tester		Validate
6	UBET_96001_C_00031_201909231055.TXT	1	0	10/02/2019 10:05:21	Rating Board Tester		Validate
5	UBET_96001_C_00031_201908211055.TXT	1	0	10/02/2019 10:05:15	Rating Board Tester		Validate
4	UBEP_96001_C_00031_201909250653.TXT	1	0	10/02/2019 10:05:09	Rating Board Tester		Validate
3	UBEP_96001_C_00031_201806111037XX.txt.TXT	1	0	10/02/2019 10:05:04	Rating Board Tester		Validate
2	UBDP_96001C_00031_20190924181217.txt	2	0	10/02/2019 10:04:45	Rating Board Tester		Validate

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The “Import File Log” contains the following information:

- **Batch # - Batch Number** - Sequential number assigned by BEEP
- **File Name** – Name of the .txt file imported from the User or Carrier
- **USR Count** – Total number of USRs in the file
- **Failed USR Count** – Number of USRs that failed to be imported
- **Uploaded** – Date and time the file was imported
- **Uploaded By** – User or Carrier that imported the file
- **Errors** – Number of errors in the file
- **Validate** – Button used to submit the file for validation

If a USR import was unsuccessful, the “Failed USR Count” will reflect the number of USRs that failed to import, and the “Errors” column will reflect the number of errors on the USRs that failed. To determine why the import of the USRs was unsuccessful, select the number in the “Errors” column.

BEEP will display the “Imported File Log Errors” report for that import, which lists the errors detected by BEEP while trying to import the data from the file.

Imported File Log Errors				
Time Stamp	Severity	Record Type	Link data	Description
10/3/2019	Critical	USR	960010000202896201 319710011Z	USR dropped due to inconsistent split data. Please fix split information on source data and then re-import this USR.
10/3/2019	Critical	USR	960010000202896201 319710011Z	Mod effective dates not consistent inside split. Found mod effective dates of "971001" and "970901"

[Close](#)

The "Imported File Log Errors" page contains the following information:

- Time Stamp – Date the USR was imported
- Severity – Indicates the severity level of error
- Record Type – Indicates which record (page) is in error
- Link Data – Using the above example this field contains the following:
 - Carrier Code - 96001
 - Policy Number – 00000202896201
 - DCO State Code - 31
 - Policy Effective Date (YYMMDD) – 97-10-01
 - USR Number – 1 = First Report and 0 indicates no corrections
 - Description – the error message

Click [Close](#) to leave this page and return to the "Imported WCSTAT Files" page.

Imported WCSTAT Files							
Batch	File Name	USR Count	Failed... Count	Uploaded	Uploaded By	Errors	Validate
4	UBET_96001_C_00031_201908211055JS.TXT	1	0	10/03/2019 03:19:11	Rating Board Tester		Validate
3	UBET_96001_C_00031_201908211055.TXT	1	1	10/03/2019 02:59:15	Rating Board Tester	2	Validate
2	UBEP_96001_C_00031_201806111037XX.txt.TXT	1	0	10/03/2019 11:23:30	Rating Board Tester		Validate
6	UBET_96001_C_00031_201909231055.TXT	1	0	10/02/2019 10:05:21	Rating Board Tester		Validate
5	UBET_96001_C_00031_201908211055.TXT	1	0	10/02/2019 10:05:15	Rating Board Tester		Validate
4	UBEP_96001_C_00031_201909250653.TXT	1	0	10/02/2019 10:05:09	Rating Board Tester		Validate
3	UBEP_96001_C_00031_201806111037XX.txt.TXT	1	0	10/02/2019 10:05:04	Rating Board Tester		Validate
2	UBDP_96001C_00031_20190924181217.txt	2	0	10/02/2019 10:04:45	Rating Board Tester		Validate

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Clicking on "Validate" in the "Validate" column, will submit that file for validation.

You are then navigated to the "USR Validation Request Submitted" page.

USR Validation Request Submitted

Your request has been submitted for background validation. Processing times will vary depending on server activity and the size of your request.

The validation batch ID is: 20191004-JKKKIT

You will receive an email when the validation is complete. To view the status of your request, choose "Validation Batches" from the menu

Click [Close](#) to leave this page and return to the "Imported WCSTAT Files" page.

Once the validation request has been submitted you will receive two emails. The first email will indicate a validation request has been submitted.

A BEEP validation request has been submitted by user nytester at 10/4/2019 11:19:01 AM.
It has been assigned a validation batch id of (20191004-JKKKIT).

The following (1) USRs are contained in this validation request:

Entered	USR ID	Carrier	Policy	Eff Date	Report	Corr Seq	State			
Pragmatix.CDX.Timestamp		14447367		96001	0000202896201		971001 1	Z		31

Based on a variety of factors, including the size of your request and the system utilization, your request may take several hours. You will receive another email when the validation process is complete validation and you can check the status of the validation process at any time using the validation batch log.

The second email will let you know the validation has finished.

The BEEP validation request (20191004-JKKKIT) submitted by nytester has finished processing.

To see the results of the validation, see the "BEEP - Validation Batches" section.

Validation Batches

This section will cover the results of the batch validation that was initiated on the “Import Files” page as well as downloading the WCSTAT Validation Summary Report.

Once the imported files have been released for submission and you have received the email stating the validation has completed you can now navigate to the “BEEP - Validation Batches” page by clicking on “Validation Batches” link under the BEEP Submissions menu.

BEEP - Validation Batches											
Batch Identifier	Submitted Date	Completed Date	Success	Warning	Failure	Processi...	Total	Submitted By	Download Re...		
									PDF	CSV	
20191003-WDESMC	10/03/2019 02:06:34	10/03/2019 02:06:45	2	0	1	0	3	nytester	±	±	
20191003-ASGNIQ	10/03/2019 01:46:15	10/03/2019 01:46:44	1	0	1	0	2	nytester	±	±	
20190926-DVLVGA	09/26/2019 02:40:25	09/26/2019 03:06:01	0	0	1	0	1	nytester	±	±	
20190925-XFOIFK	09/25/2019 01:23:37	09/26/2019 03:06:01	1	0	0	0	1	nytester	±	±	
20190925-FKOJRT	09/25/2019 01:23:05	09/26/2019 03:06:01	1	0	0	0	1	nytester	±	±	
20190925-EBTRYG	09/25/2019 01:22:38	09/26/2019 03:06:01	3	0	0	0	3	nytester	±	±	


[First](#)
[Previous](#)
[Goto](#) Page of 1 (6 items)
 [Next](#)
[Last](#)

The “BEEP - Validation Batches” page lists the following information:

- **Batch Identifier** - Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- **Submitted Date** – Date and time the batch was submitted for validation
- **Completed Date** – Date and time the batch validation finished
- **Success** – Number of USRs that passed validation
- **Warning** – Number of USRs with a warning
- **Failure** – Number of USRs that failed validation
- **Processing** – Number of USRs currently processing (validation has not completed)
- **Total** – Total number of USRs in the batch
- **Submitted By** - User who submitted the validation
- **Download Report (PDF)** – Produces the “WCSTAT Validation Summary”
- **Download Report (CSV)** – Produces the “Validation Report”

The validation submissions are displayed in a sortable and searchable grid. Click on the arrows in the header row of the column to sort that column. To search for a result within the grid, enter your search criteria into the data entry field under that column’s header row and click “Enter” on your keyboard.

You can enter search criteria for one or multiple columns at the same time when searching for a batch.

To view the “WCSTAT Validation Summary” report for a submission, click on the download icon  under the “PDF” column located under the “Download Report” column for that batch. Once clicked, a pop-up will ask if you want to “Open” or “Save” the spreadsheet, or you can select “Cancel”.



Clicking on “Open” displays the WCSTAT Validation Summary

WCSTAT Validation Summary					
Submitted By: nytester	Submitted: 10/3/2019 2:06:34 PM	Completed: 10/3/2019 2:06:45 PM			
Batch Id: 20191003-WDESMC					
Summary					
Units Validated:	3	Unable To Validate:	0	Warnings:	0
Passed Validation:	2	Failed Validation:	1		

The top of the report contains the following identifying information:

- Submitted By – User who submitted the validation request
- Submitted – Date and time the batch was submitted for validation
- Completed – Date and time the batch validation finished
- Batch Id - Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)

The body of the report provides an overall “Summary” of the validation batch and contains the following information:


- Units Validated – Number of USRs validated
- Unable To Validate – Number of USRs not validated
- Warnings – Number of USRs that had warnings
- Passed Validation – Number of USRs that passed
- Failed Validation – Number of USRs that failed validation

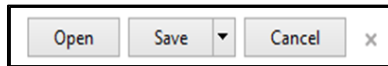
The next page of the report contains the same identifying information at the top.

WCSTAT Validation Summary						
Submitted By: nytester	Submitted: 10/3/2019 2:06:34 PM	Completed: 10/3/2019 2:06:45 PM				
Batch Id: 20191003-WDESMC						
Failure Summary						
USR: 14447348	Batch: 0	Entered: 9/20/2019	Status: FAILED	State: 31	Corr: 0	Rpt: 1
Carrier: 96001	Pol Eff Date: 1/1/2017	Policy Number: TEST123		Errors: 2		
BEEP Screen	Field Name	Record Id	Description	Claim	Class	
EXPOSURE	CLASSIFICATION	68642144	Not a Valid Classification code.			
EXPOSURE	PREMIUM_AMO UNT	68642144	Premium must be entered			

The body of the report provides the “Failure Summary” of the validation batch and contains the following information:

- USR - Sequential number assigned by BEEP
- Batch – Sequential number assigned by BEEP
- Entered – Date the USR was entered
- Status - Indicates the status of the batch
- State – DCO Exposure State
- Corr. – Correction Sequence Number
- Rpt. – Report Level Code/Report Number
- Carrier – Carrier Code
- Policy Eff Date – Policy Effective Date
- Policy Number
- Errors – Number of errors on the report
- BEEP Screen – Which page in BEEP has the error
- Field Name – Name of the data entry field
- Record Id - Unique number assigned by BEEP
- Description – Error message
- Claim – Carrier assigned claim number
- Class – Class Code

To view the “Validation Errors” report for a submission, click on the download icon  under the “CSV” column located under the “Download Report” column for that batch. Once clicked, you will see a brief pop-up stating, “Downloading Validation Summary”. Once the report has been downloaded you will receive another pop-up asking if you want to “Open” or “Save” the spreadsheet, or you can select “Cancel”.



Clicking on “Open” displays the Validation Summary Report

Batch Id	Submitted By	Submitted	Completed	Units Validated	Unable To Validate	Warnings	Passed Validation	Failed Validation
20191004-	nytester	10/4/2019 11:25	10/4/2019 11:25	2		0	0	1

Batch Id	Record Id	USR Batch	USR Number	Carrier	Policy Number	Pol Eff Date	Rpt	Corr
20191004-	22016167		2	14447356 96001	TESTX7808	1/1/2017		1
20191004-	22016167		2	14447356 96001	TESTX7808	1/1/2017		1
20191004-	22016167		2	14447356 96001	TESTX7808	1/1/2017		1
20191004-	22016167		2	14447356 96001	TESTX7808	1/1/2017		1
20191004-	22016167		2	14447356 96001	TESTX7808	1/1/2017		1
20191004-	22016167		2	14447356 96001	TESTX7808	1/1/2017		1

State	Claim	Class	Status	Entered	BEEP Screen	Field Name	Description
31		0000	FAILED	10/2/2019	LOSS	CLASSIFICATION	Required Field must be entered
31		0000	FAILED	10/2/2019	LOSS	CLASSIFICATION	Not a Valid Classification code.
31		0000	FAILED	10/2/2019	LOSS	INJURY_CODE	Imported value is invalid. The default value will display when viewing not the imported value
31		0000	FAILED	10/2/2019	LOSS	INJURY_DESC_PART	Policies effective 01-01-06 and after require Injury Description (Part) to be completed.
31		0000	FAILED	10/2/2019	LOSS	INJURY_DESC_NATURE	Policies effective 01-01-06 and after require Injury Description (Nature) to be completed.
31		0000	FAILED	10/2/2019	LOSS	INJURY_DESC_CAUSE	Policies effective 01-01-06 and after require Injury Description (Cause) to be completed.

The top of the report contains the following identifying information:


- Batch Id - Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- Submitted By – User who submitted the validation request
- Submitted – Date and time the batch was submitted for validation
- Completed – Date and time the batch validation finished
- Units Validated – Number of USRs validated
- Unable To Validate – Number of USRs not validated
- Warnings – Number of USRs that had warning messages
- Passed Validation – Number of USRs that passed validation
- Failed Validation – Number of USRs that failed validation

Because the report is produced with several columns, the body of the report has been split to give you a full picture of what the report would look like.

The body of the report provides the following validation details:

- Batch Id - Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- Record Id – Unique number assigned by BEEP
- USR Batch – Sequential number assigned by BEEP
- USR Number - Sequential number assigned by BEEP
- Carrier – Carrier Code
- Policy Number
- Policy Eff Date – Policy Effective Date
- Rpt. – Report Level Code/Report Number
- Corr. – Correction Sequence Number
- State – DCO Exposure State
- Claim – Carrier assigned claim number
- Class – Class Code
- Status – Indicates the status of the batch
- Entered – Date the USR was entered
- BEEP Screen – Which section in BEEP has the error
- Field Name – Name of the data entry field

- Description – Error message

If you want a list of all the batches on the “BEEP - Validation Batches” page, click on the  icon in the lower right corner of the grid to initiate a download into an Excel spreadsheet.

Once the file is created, your browser will display the file for download. The download behavior varies by browser type.

Clicking on “Open” displays a list of Validated Batches

	A	B	C	D	E	F	G	H	I	J	K
1	Id	BatchIdentifier	Submitted	Completed	Success	Warning	Failure	Processing	Total	SubmittedBy	UMGId
2	849575939	20200208-FNDEVW	2/8/2020 11:36	2/8/2020 11:36	1	0	0	0	1	nytester	96001
3	849575938	20200208-VLLIKX	2/8/2020 10:31	2/8/2020 10:31	1	0	0	0	1	nytester	96001
4	849281024	20200206-PGXNLU	2/6/2020 11:32	2/6/2020 11:33	0	0	0	0	0	nytester	96001
5	849084416	20200205-GLNYJU	2/5/2020 12:10	2/5/2020 12:10	0	0	1	0	1	nytester	96001
6	848461826	20200131-YEBNLS	1/31/2020 10:43	1/31/2020 10:46	62	2	0	0	64	nytester	96001
7	848461825	20200131-WIQGNO	1/31/2020 8:50	1/31/2020 8:50	0	0	1	0	1	nytester	96001
8	848363520	20200130-MIPDKE	1/30/2020 15:03	1/30/2020 15:03	0	0	1	0	3	nytester	96001
9	847904770	20200128-TCLRVB	1/28/2020 15:52	1/28/2020 15:52	0	0	1	0	1	nytester	96001
10	847544324	20200124-LLUBCL	1/24/2020 16:19	1/24/2020 16:20	3	0	0	0	3	nytester	96001

This report contains the following information:

- Id - Unique number assigned by BEEP
- Batch Identifier - Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- Submitted – Date and time the batch was submitted for validation
- Completed – Date and time the batch validation finished
- Success - Number of USRs that passed validation
- Warning - Number of USRs that had warning messages
- Failure – Number of USRs that failed validation
- Processing - Number of USRs that are still processing
- Total – Total number of USRs included in the batch
- Submitted by – User who submitted the file
- UMG ID - Your UMG carrier ID number

For more information on how to make corrections, see the “Corrections, Replacements, and Subsequent Reports” section for more information.

Archived Files

CDX Compensation Data Exchange

BEEP HOME SEARCH NEW USR SUBMISSIONS HELP

BEEP is used for the entry, import, editing, validating and/or submission of Unit Statistical Reports (USRs).

Available Features:
SEARCH

Submissions menu items:
Create File
Import File
Submission Files
Imported Files
Validation Batches
Archived Files

To have an “Archived File”, you must first archive selected USRs. For information on how to archive, see “Archive Selected USRs” under the “Search” section in BEEP.

CDX strongly encourages you to periodically archive USRs in BEEP. USR retention in BEEP is three years from the submission and/or entry data—whichever is later.

Clicking on the “Archived Files” menu will navigate you to the “BEEP – Archived Files” page.

Submitted By	Identifier	Submitted	Completed	Status	State	Carrier	USR Count	Success	Failure	
Rating Board Tester	20190926-MVMKTX	09/26/2019 02:50:59	09/26/2019 03:06:18	All	NY	96001	1	1	0	

Page 1 of 1 (1 items)

The “Archived Files” page contains the following information about each archived batch:

- **Submitted By** – User that submitted the archive batch
- **Identifier** – Batch Identifier - Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- **Submitted** – Date and time the batch was submitted for archiving
- **Completed** – Date and time the batch archived finished
- **Status** – Defaults to “All” (Other choices are: Queued, Processing, Completed or Failed)
- **State** – DCO Exposure State
- **Carrier** – Carrier Code
- **USR Count** – Number of USRs included in the archive batch
- **Success** - Number of USRs that passed validation
- **Failure** - Number of USRs that failed validation

If you want to view an archived batch, first locate the batch file you want to view, then

click on the  icon on the far-right side of the selected batch.

You will then see a pop-up asking if you want to “Open” or “Save” the file, or you can select “Cancel”.



Clicking on “Open” displays a text report listing the USRs contained in that archived batch.

- Policy Eff Date – Policy Effective Date
- Rep. – Report Level Code/Report Number
- Corr. – Correction Sequence Number
- Edit Status – USR status
- State – DCO Exposure State


The next page of the report contains the same identifying information.

WCSTAT Archiving Summary										
Submitted By: nytester		Submitted: 9/26/2019 2:50:59 PM		Completed: 9/26/2019 3:06:18 PM		Archive Id: 20190926-MVMKTX				
Failed To Archive										
Date Entered	USR #	Batch #	Carrier	Policy Number	Policy Eff Date	Rep.	Corr.	Edit Status	State	
Details:										

The body of the report provides a list of USRs that “Failed To Archive”. This section contains the following information:

- Date Entered - Date the USR was entered or imported into BEEP
- USR # – Unique number assigned by BEEP
- Batch # - Sequential number assigned by BEEP
- Carrier – Carrier Code
- Policy Number
- Policy Eff Date – Policy Effective Date
- Rep. – Report Level Code/Report Number
- Corr. – Correction Sequence Number
- Edit Status – USR status
- State – DCO Exposure State
- Details – Error message

If you want a list of all the batches on the “BEEP - Archived Files” page,

you can click on the paper  icon in the lower right corner of the grid to initiate a download into an Excel spreadsheet.

Once the file is created, your browser will display the file for download. The download behavior varies by browser type.”

Clicking on “Open” displays a text report listing all the batches in the “Archive Log”

	A	B	C	D	E	F	G	H	I	J	K
1	Id	SubmittedBy	Identifier	Submitted	Completed	Status	USRCount	Success	Failure	State	Carrier
2	841416704	Rating Board Tester	20191001-YJNEDG	10/1/2019 13:37	10/1/2019 13:52	Complete	2	0	0	NY	96001
3	841285632	Rating Board Tester	20190926-MVMKTX	9/26/2019 14:50	9/26/2019 15:06	Complete	1	1	0	NY	96001

The text report lists the following:

- Id – Identifier - Unique identifier assigned by BEEP

- Submitted By – User who submitted the batch for archiving
- Identifier – Unique identifier assigned by BEEP where the first 8 characters are the submitted date (CCYYMMDD)
- Submitted – Date and time the batch was submitted for archiving
- Completed – Date and time the batch archived finished
- Status – Batch status
- USR Count – Number of USRs in the archive batch
- Success – Number of USRs that passed validation
- Failure – Number of USRs that failed validation
- State – DCO Exposure State
- Carrier – Carrier Code

Archived files can be downloaded for up to 60 days from the date they were created.

Submitting Files via FTP

Specifying BEEP as the destination FTP location

The BEEP FTP site uses the same address that is used for submitting files via CDX (ftps.cdxworkcomp.org). For the file handler to load the file into the BEEP database, you must append “@beep.cdxworkcomp.org” to the CDX FTP Credential User Name

Example: cdxuser@beep.cdxworkcomp.org

Use the same password associated with the FTP Credential to submit files via FTP.

Creation of BEEP New and Submitted FTP Directories

For the file handler to understand which type of USR is being uploaded (new or submitted), two new directories — “new” and “submitted”—must be created in the directory under the initial user logon. These directories can be created manually or in an automated script by adding the “mkdir new” and “mkdir submitted” to the top of every script.

Files uploaded via FTP into the root user directory will not be processed. An email notification will be sent advising the user that the file cannot be processed.

File Format

Files uploaded via FTP can be sent zipped or plain text and protected with the security related extensions SFTP or FTP/SSL.

The file must be in 250-byte WCSTAT format with EBCDIC or ASCII character coding.

Once submitted to BEEP you will receive the same two emails as described above. After the second email, you can log into BEEP to verify the file has been imported by clicking the Submissions menu then “Imported Files”. See “Imported Files” for more details.

While CDX recommends the use of a standard naming convention as outlined in Appendix B, BEEP does not validate the naming convention of the file.

APPENDIX A: State Codes

United States	State Codes	
Alabama	AL	01
Alaska	AK	54
Arizona	AZ	02
Arkansas	AR	03
California	CA	04
Colorado	CO	05
Connecticut	CT	06
Delaware	DE	07
District of Columbia	DC	08
Florida	FL	09
Georgia	GA	10
Hawaii	HI	52
Idaho	ID	11
Illinois	IL	12
Indiana	IN	13
Iowa	IA	14
Kansas	KS	15
Kentucky	KY	16
Louisiana	LA	17
Maine	ME	18
Maryland	MD	19
Massachusetts	MA	20
Michigan	MI	21
Minnesota	MN	22
Mississippi	MS	23
Missouri	MO	24
Montana	MT	25
Nebraska	NE	26
Nevada	NV	27
New Hampshire	NH	28
New Jersey	NJ	29
New Mexico	NM	30
New York	NY	31

United States	State Codes	
North Carolina	NC	32
North Dakota	ND	33
Ohio	OH	34
Oklahoma	OK	35
Oregon	OR	36
Pennsylvania	PA	37
Rhode Island	RI	38
South Carolina	SC	39
South Dakota	SD	40
Tennessee	TN	41
Texas	TX	42
Utah	UT	43
Vermont	VT	44
Virginia	VA	45
Washington	WA	46
West Virginia	WV	47
Wisconsin	WI	48
Wyoming	WY	49

Canadian Provinces	Province Code	
Alberta	AB	61
British Columbia	BC	62
Manitoba	MB	63
New Brunswick	NB	64
Newfoundland & Labrador	NL	72
Northwest Territories	NT	60
Nova Scotia	NS	65
Nunavut	NU	70
Ontario	ON	67
Prince Edward Island	PE	66
Québec	QC	68
Saskatchewan	SK	69
Yukon Territory	YT	71

APPENDIX B: File Naming Convention for CDX

BEEP will utilize the following naming convention when creating submission files to send to the DCOs. For carriers creating submission files, these instructions are online guidelines. During import, CDX does not validate the file name.

Example: AAEP_SSSSSC_RRRRR_CCYMMDDHHMMSS.FFF

Where:

_ = 1 underscore delimiter for readability

AA = Type of Data

UB = WCSTAT - Unit Stat data in BEEP format (ASCII)

E = Source

E = CDX

D = Direct FTP

M = E-mail

P = Data Type

P= Production

T = Test

SSSSS = Sender Carrier/State Code (preceded by ZEROS if code is less than 5)

C = Sender Type

C = Carrier

T = TPA

D = DCO

RRRRR = Receiver Carrier/State Code (preceded by ZEROS if code is less than 5)

CCYYMMDDHHMM = Submission Date/Time

CC = Century (i.e. 20)

YY = Year (i.e. 03)

MM = Month (i.e. 01 thru 12)

DD = Day (i.e. 01 thru 31)

HH = Hour (on a 24-hour clock [i.e. 01 thru 24])

MM = Minute (on 60 minute hour [i.e. 01 thru 60])

FFF = File Extension

BIN = Binary

TXT = Text

Glossary of Terms

ASCII	American Standard Code for Information Interchange. A standard coding scheme for representing characters as data
ASWG	Advisory Statistical Working Group—A group within the WCIO that developed the revised USR data format, and by extension, the formats themselves.
Batch Number	Identifies groups of USRs as they are entered into BEEP® on a particular date
BEEP®	Bureau Entry & Edit Package—A web-based application designed to give Insurers the ability to enter, validate and submit Workers Compensation statistical information.
Breadcrumbs	A link to a prior screen
Bureau Version Identifier (Edition Number)	An identifier used to correspond to a specific endorsement number reported previously
Carrier Version Identifier	An identifier used to determine the version of the endorsement applied to a policy
CDX®	Compensation Data Exchange. CDX® is a secure Internet based service that facilitates the electronic transmission of Workers' Compensation data between member insurers and DCOs
Correction Report	A USR which revises previously reported data within a report level, correction reports are sequentially numbered (i.e., the first, second or third correction to a First Report)
DCO	Data Collection Organization – An organization that collects workers' compensation information. A DCO can be a bureau, jurisdiction or statistical agent
Date Entered	The date a USR was entered into BEEP® either by data entry or import
EBCDIC	Extended Binary Coded Decimal Interchange Code - A standard coding scheme for representing characters as data commonly used on mainframe computers (compare ASCII).
Edit Status	Defines the state of the transaction within PEEP® and BEEP®. Edit statuses are defined in the associated User Guide.
Employee Leasing Policy Type Code	A code used to identify the type of employee leasing policy.
Endorsement Number	An identifier used to report an endorsement number

Endorsements with Variable Data	These are the individual endorsements that are attached to a policy that contain information beyond the standard endorsement wording. Meaning the endorsement requires policy specific variable text
ETR	Electronic Transmittal Record – Is the first line of a submission file used to identify data within, and destination of a submission
Exposure Period Code	A code used to identify the period covered by the reported estimated exposure amount.
EXR	Product used to access rating data from participating DCOs
First Report	The initial USR for a policy, which reflects policy, exposure, premium, and loss information that is valued and submitted per the established USR valuation schedule
IAIABC	International Association of Industrial Accident Boards and Commissions - A non-profit trade association providing workers' compensation information and education
Import	To bring data into a computer system from an external source. PEEP® provides the facility to import policy transactions (WCPOLS) and BEEP® provides the facility to import USRs (WCSTAT).
Legal Nature of Entity Code	A code used to identify the type of entity(s) being insured. (Reported in the Name Record)
Legal Nature of Insured Code	A code used to identify the type of entity(s) being insured. (Reported in the Header Record)
Link Data	The data elements which are required to be reported consistently for all records within a transaction. Link data is used to keep these records connected for processing, storage and identifying duplicate data
Name Link Identifier	An identifier used to link names with their corresponding addresses and exposures.
PEEP	Policy Entry and Edit Package— A web-based application designed to give Insurers the ability to enter, validate, and submit Workers Compensation policy information
POC	Proof of Coverage – Data derived from a workers' compensation policy which is used by state accident boards and commission to verify workers' compensation coverage for the employers in their state.
Policy Change Effective Date	The date of change or addition reported on the record
Policy Change Expiration Date	The date of change or deletion reported on the record

Primary Administrator	The administrator responsible for a CDX User Management Group (UMG)
Replacement Report Code	A code used to report if the USR is replacing a previously submitted report
Retrospective Rating Code	A code used to report the type of retrospective rating plan applied
Secondary Administrator	A CDX User delegated some administrator privileges
SFTP	Secure File Transfer Protocol – Provides a secure method for sending or receiving files in CDX
SSL	Secure Sockets Layer – An interface between applications (such as browsers) and the Transmission Control Protocol/Internet Protocol (TCP/IP) protocols to provide server authentication, client authentication, and an encrypted communication channel between client and server.
State Unemployment Number	The unemployment number issued by a given state.
Submission File	An electronic file created to submit data.
Subsequent Report	A USR that is valued and submitted on a predetermined 12-month schedule after the First Report. Subsequent Reports provide updated information on losses from the Second Report through the Tenth Report.
TPA/TPE	Third Party Administrator/Third Party Entity – An organization that processes insurance transactions for a separate entity
Transaction Issue Date	The date of issuance of the transaction
Transaction Type Code	The code use to identify the type of transaction that is being submitted by the carrier. See the WCIO for the list of possible values.
UMG	User Management Group – Represents a group of users managed by a single Primary Administrator
Validate	The process of running edits

Summary of Changes

Page, Section, etc.	Date of Change	Change/Update
All	8/28/2022	Guide reviewed for accuracy and additional content