



Claim Linking Quick Start Guide

Data Manager Dashboard

The following are included on the main Summary page:

1. The **Linking/Verification** tab is accessed within the Summary section
2. The **Linking/Verification** tab provides access to the Unit Claim Linking and Unit Key Field Verification grids
3. Data is displayed by carrier group
4. If a data type is not reported by a carrier group for the Policy Effective Data range, a message “No Data Found” will display

Data Manager Dashboard

Summary | Policy | Unit | DCI | Financial | Medical | Indemnity | Pool | Compliance | Tools and Information | About

Summary - 45856- NCCI TRAINING CO

Key Indicators | Residual Market | **Linking/Verification**

For informational purposes only. Please contact your validator before making any changes to your data.

Unit Claim Linking						
Data Type	Data Refreshed	Received	Linked (%)	Unlinked	Policy Effective Date Range	Linking Parameters
DCI	01/17/2021	300	16	252	01/01/2017 - 04/30/2019	Carrier Group/Code, Policy Nbr, Pol Eff Dt, Claim Nbr, Jurisdiction State, Accident Dt, Loss Cond Cov Code
Financial-31 Large Loss	03/21/2021	144	0	144	03/01/2017 - 06/30/2019	Carrier Group, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt
Financial-33 VA Coal Mine				No Data Found		
Pool	03/21/2021	435	0	435	03/01/2017 - 06/30/2019	Carrier Code, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt

Unit Key Field Verification						
Data Type	Data Refreshed	Received	Matched (%)	Unmatched	Policy Effective Date Range	Verification Parameters
Indemnity	03/22/2021	29,457	84.84	4,465	03/01/2017 - 06/30/2019	Carrier Code, Policy Nbr, Pol Eff Dt, Claim Nbr
Medical				No Data Found		

1. Unit Claim Linking - Generates claim linkages on a defined schedule between the source data and unit data.
2. Unit Key Field Verification - Verifies reported key fields between the source data and unit data on receipt.

Unit Claim Linking Grid

Compares DCI , Financial Calls 31 and 33, and Pool to Unit claim data.

1. **Data Type**—identifies which data type the parameters and results are being derived from.
2. **Data Refreshed**—displays the last time linking data was updated. Linking is updated on a scheduled basis depending on the data type.
3. **Received**—displays the number of claims received and used to link.
4. **Linked (%)**—displays the percentage of claims that linked.
5. **Unlinked**—displays the number of claims that did not link and provides hyperlinks to view claim details.
Note: If there are more than 1,000 claims, an option to download, view partial, or cancel will display.
6. **Policy Effective Date Range**—displays the range of policy effective dates used to link.
7. **Linking Parameters**—displays the data elements that are used to link.

1 Data Type	2 Data Refreshed	3 Received	4 Linked (%)	5 Unlinked	6 Policy Effective Date Range	7 Linking Parameters
DCI	01/17/2021	300	16	252	01/01/2017 - 04/30/2019	Carrier Group/Code, Policy Nbr, Pol Eff Dt, Claim Nbr, Jurisdiction State, Accident Dt, Loss Cond Cov Code
Financial-31 Large Loss	03/21/2021	144	0	144	03/01/2017 - 06/30/2019	Carrier Group, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt
Financial-33 VA Coal Mine				No Data Found		
Pool	03/21/2021	435	0	435	03/01/2017 - 06/30/2019	Carrier Code, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt

Claim Linking Quick Start Guide

Unit Key Field Verification Grid

Compares indemnity and medical records to Unit claim data.

1. **Data Type**—identifies which data type the parameters and results are being derived from.

Note: Hyperlinks provide access to the Key Field Verification screens in the **Indemnity Data Collection** tool or **Medical Data Collection** tool.

2. **Data Refreshed**—displays the last time data was updated. Information is updated each time a file is submitted.

3. **Received**—displays the number of claims received for the data type.

4. **Matched (%)**—displays the percentage of claims that are matched.

5. **Unmatched**—displays the number of claims that are not matched.

6. **Policy Effective Date Range**—displays the range of policy effective dates used to match.

7. **Verification Parameters**—displays the key fields that are used for matching.

Unit Key Field Verification						
1 Data Type	2 Data Refreshed	3 Received	4 Matched (%)	5 Unmatched	6 Policy Effective Date Range	7 Verification Parameters
Indemnity	03/22/2021	29,457	84.84	4,465	03/01/2017 - 06/30/2019	Carrier Code, Policy Nbr, Pol Eff Dt, Claim Nbr
Medical	No Data Found					

Financial Calls 31/33 Unlinked Claim Details

Financial Call Unlinked Claim Explanation

1. Information is displayed by carrier group

2. Data is refreshed twice monthly:

- January–March, the previous valuation year is used
- April–December, the current valuation year is used

3. The range of policy effective dates used to link

4. Parameters used to link Financial data to Unit data

5. Bold red fields identify reported data elements that did not link to Unit data

6. Print and download unlinked claim details

Unit Claim Linking						
Data Type	Data Refreshed	Received	Linked (%)	Unlinked	Policy Effective Date Range	Linking Parameters
Financial-31 Large Loss	03/21/2021	144	0	144	03/01/2017 - 06/30/2019	Carrier Group, Policy Nbr, Pol Eff Dt, Claim Nbr

Financial-31 Large Loss - 45856 - NCCI TRAINING CO					
Financial-31 Large Loss Unlinked Claims as of 03/21/2021 06:10 AM					
For Reporting Group 45856					
Policy Effective Date Range: 3/1/2017 - 6/30/2019					
4 Policy Nbr	Policy Eff Dt	Claim Nbr	State	Accident Dt	
2175091230	01/01/2019	C1397071	CO-05	12/01/2019	
6470410790	01/01/2019	C1397072	CO-05	12/01/2019	
9202866347	10/01/2018	C1397073	KS-15	10/04/2018	
6883047209	09/28/2018	C1397074	KS-15	10/16/2018	
9022426383	09/05/2018	C1397075	KS-15	11/21/2018	
5069586550	09/01/2018	C1397076	WV-47	11/25/2018	
5069586550	08/02/2018	C1397077	AZ-02	09/12/2018	
6792539901	07/17/2018	C1397078	TX-42	09/29/2018	
4608498815	07/06/2018	C1397079	KS-15	07/10/2018	
6881237456	07/01/2018	C1397080	CT-06	08/02/2018	

1. Carrier Group, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt fields are used for linking.
2. Bold red fields could not be used for linking.

Claim Linking Quick Start Guide

Pool Unlinked Claim Details

Pool Unlinked Claim Explanation

1. Information is displayed by carrier group
2. Data is refreshed quarterly
3. The range of policy effective dates used to link
4. Parameters used to link Pool data to Unit data
5. Bold red fields identify reported data elements that did not link to Unit data
6. Print and download unlinked claim details

Unit Claim Linking						
Data Type	Data Refreshed	Received	Linked (%)	Unlinked	Policy Effective Date Range	Linking Parameters
Pool	03/21/2021	435	0	435	03/01/2017 - 06/30/2019	Carrier Code, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt

Pool - 45856 - NCCI TRAINING CO						
Pool Unlinked Claims as of 03/21/2021 06:09 AM						
Policy Effective Date Range: 3/1/2017 - 6/30/2019						
Carrier Code	Policy Nbr	Policy Eff Dt	Claim Nbr	State	Accident Dt	
45856	7175091230	06/26/2019	C1397081	GA-10	09/27/2019	
45856	7470410790	06/16/2019	C1397082	VT-44	08/23/2019	
45856	7202866347	06/13/2019	C1397083	NC-32	01/17/2020	
45856	7883047209	06/09/2019	C1397084	NC-32	02/28/2020	
45856	7022426383	06/06/2019	C1397085	GA-10	06/14/2019	
45856	7069586550	01/01/2016	C1397086	WV-47	03/08/2018	
45856	7069586550	05/21/2019	C1397087	TN-41	05/04/2020	
45856	7792539901	05/09/2019	C1397088	AZ-02	01/04/2020	
45856	7608498815	05/08/2019	C1397089	TN-41	02/13/2020	
45856	7881237456	05/04/2019	C1397080	KS-15	03/30/2020	
45856	7120605044	04/11/2019	C1397091	NC-32	01/15/2020	

1. Carrier Code, Policy Nbr, Pol Eff Dt, Claim Nbr, State, Accident Dt fields are used for linking.
2. Bold red fields could not be used for linking.

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