



Financial Data Collection Tool Edits & Notifications

Menus for searching
Edits and
Notifications are
combined.

The screenshot displays the Financial Data Collection Tool interface. On the left, a sidebar menu is open, showing options: Message Center, Deviations, Call Data, Edits, Search Current Edits, Request Edit Report, Notifications, Tools and Information, Publications and Training, and About. The 'Edits' and 'Notifications' items are highlighted with a green box. A blue arrow points from a text box on the left to this green box. Another blue arrow points from the 'Search Edits and Notifications' option in the expanded 'Edits and Notifications' sub-menu to the 'ST ACCT 2 (INT USE)' section of the main dashboard. The main dashboard features a workflow: Upload / Validate Calls, Address Edits, Submit Calls, and Sign Compliance Form. Below this, a 'State Details' section shows a grid of state abbreviations with corresponding status indicators (green or grey).

State Details															
AK	AL	AR	AZ	CO	CT	CW	DC	FL	GA	HI	IA	ID	IL	IN	KS
LA	MD	ME	MO	MS	MT	NC	NE	NH	NM	NV	OK	OR	RI	SC	SD
TX	UT	VA	VT	WV											



Financial Data Collection Tool Edits & Notifications

Financial Data Collection

Search for Financial Data Edit

[Hide Search Criteria](#)

Edit Filter

To view Edit information, select Carrier Code, filter criteria, and click 'Search'.

In the search results, click the expand icon to display additional edit details. Clicking the print icon will generate an Edit Report based upon the selected criteria.

Carrier Code:

Valuation Year:

Call Type:

State:

Edit Type:

Edit #:

Filter:

Explanation Accepted:

Filter options
simplified to
search for
outstanding edits.

New header
identifies carriers
and number of
rejected
explanations.

Financial Data Collection

Financial Data Edits and Notifications

Explanation Rejected (Outstanding Notifications): 1 for Carrier(s) 11111 [Hide Search Criteria](#)

Edit Filter

To view Edit information, select Carrier Code, filter criteria, and click 'Search'.

In the search results, click the expand icon to display additional edit details. Clicking the print icon will generate an Edit Report based upon the selected criteria.

Carrier Code:

Valuation Year:

Call Type:

State:

Edit Type:

Edit #:

Explanation Needed:

Explanation Accepted:



Financial Data Collection Tool Edits & Notifications

Edits with
notifications display
to the top.

Edits with rejected
explanations
identified with new
blue icon.

Financial Data Edits and Notifications

Explanation Rejected (Outstanding Notifications): 1 for Carrier(s) 11111

[Hide Search Criteria](#)

Edit Filter

To view Edit information, select Carrier Code, filter criteria, and click 'Search'.

In the search results, click the expand icon to display additional edit details. Clicking the print icon will generate an Edit Report based upon the selected criteria.

Carrier Code: 11111 - NCCI TEST ACCT 1 (USE ONLY CS_)

Call Type: All Calls

Explanation Needed: Select Filter

Explanation Accepted:

Valuation Year: As of December 31, 2023

State: All States

Edit Type: POST-SUBMISSION EDITS

Edit #:

[Search](#) [Reset](#)

Search Edit Results

State	Edit #	Observation/ Claim #	Call	Edit Description	Carrier Explanation
FLORIDA	781	2023	3 Policy Year	Departure from NCCI DSR premium level not equal to expected. Voluntary NCCI DSR Premium: 2,342,340; Voluntary Company Standard Premium: 2,340; Ratio: 0.001. Please examine the deviation history we have on file for your company. If our information is incorrect, please make the necessary changes. If the deviation history is correct, please correct the data.	
FLORIDA	498	2023	3 Policy Year	Departure from NCCI DSR premium level is lower than expected. Statewide NCCI DSR premium: 2,342,340; Statewide Company Standard premium: 2,340; Assigned Risk NCCI DSR premium: 0; Assigned Risk Company Standard premium: 0; Voluntary NCCI DSR premium: 2,342,340; Voluntary Company Standard premium: 2,340; Voluntary ratio: 0.001. In a state where the Voluntary Business Designated Statistical Reporting (DSR) Level is NCCI advisory rates, we would not expect a large downward deviation. Please correct the data, or provide an explanation.	

State	Edit #	Observation/ Claim #	Call	Edit Description	Carrier Explanation
FLORIDA	781	2023	3 Policy Year	Departure from NCCI DSR premium level not equal to expected. Voluntary NCCI DSR Premium: 2,342,340; Voluntary Company Standard Premium: 2,340; Ratio: 0.001. Please examine the deviation history we have on file for your company. If our information is incorrect, please make the necessary changes. If the deviation history is correct, please correct the data.	

Edit Detail For 11111 - NCCI TEST ACCT 1 (USE ONLY CS_SYSTEM SUPPORT) RMS

Edit # 781

Valuation: 12/31/2023

Type: Original

Observation: 2023

Call Type: 3 Policy Year

Create Date: 09/20/2024

Edit Status: Duplicate Edit

State: Florida

[Associated Call View](#)

Description: Departure from NCCI DSR premium level not equal to expected. Voluntary NCCI DSR Premium: 2,342,340; Voluntary Company Standard Premium: 2,340; Ratio: 0.001. Please examine the deviation history we have on file for your company. If our information is incorrect, please make the necessary changes. If the deviation history is correct, please correct the data.

Carrier Explanation Accepted: 0

Explanation:

Reason for Notification: ADDITIONAL EXPLANATION REQUIRED

Explanation of Notification: Please review your deviation history. If deviations are correct, please review your DSR and Company standard premium. Please provide any expense constant, balance to min premium amounts. If incorrect, please submit corrections to the data.

Respond To Notification: ☐ Save ☐ Copy Florida ☐ Copy All States

Note: Please select checkbox to respond to notification.