



Financial Call Data Tools and Resources

A Comprehensive Portfolio of Data Reporting Tools
and Resources for Financial Call Data Reporters

2018 Edition



What Is Financial Call Data?

Financial Call data is workers compensation data (premiums, losses, claim counts, and expenses) collected on an aggregated policy year, calendar-accident year, and calendar year basis.

What Is Financial Call Data Used For?

NCCI uses Financial Call data for determining the overall loss cost or rate changes at the jurisdiction level, supporting market analysis, and responding to regulatory requirements.

Tools and Resources for Financial Call Data Reporters

Tools for Reporting, Receiving, and Monitoring

NCCI offers a variety of tools on ncci.com to help you conveniently submit, view, correct, and monitor your Financial Call data.

- **Financial Data Collection** allows you to search, view, create, copy, edit, save, print, validate, correct, and submit your Financial Call data. Additionally, this tool enables you to complete and submit your Self-Audit Form, view and respond to notifications, view and update your Active Deviations, and import and export your Financial Call data. Additionally, you can create and view **Aggregate Data Quality Incentive Program (ADQIP)** assessment appeals.
- **Data Transfer via the Internet (DTVI)** is NCCI's Web-based tool for reporting your data electronically. This tool also allows you to receive error and submission reports and data files.
- **Data Manager Dashboard** helps you monitor your company's Financial Call data reporting performance. You can also access your data quality and timeliness results for the **ADQIP** and **Carrier Data Quality Report Program (Carrier Report Card)**.

The screenshot displays the NCCI Financial Data Collection web application. The top navigation bar includes 'Deviations', 'Call Data', 'Edits', 'Notifications', 'Tools and Information', and 'About'. A search bar is located in the top right corner. The main content area is titled 'Search for Financial Call Data' and features a 'Call Data Filter' section with dropdown menus for 'Carrier Code' (13118 - NCCI TRAINING INDEMNITY COMPA), 'Valuation Year' (As of December 31, 2015), 'Call Type' (All Calls), and 'State' (All States). Below the filter is a 'Search Call Results' table with columns for 'Call Type', 'State', 'Carrier', 'Submission Date', 'Submission Type', 'Current User', 'Call Status', and 'Last Validated'. The table contains several rows of data, including entries for Alabama, Arizona, Texas, and Virginia.

	Call Type	State	Carrier	Submission Date	Submission Type	Current User	Call Status	Last Validated
+	5 Calendar-Accident Year	ALABAMA	13118 - NCCI TRAINING INDEMNITY COMPANY		Original	Not In Use	VALIDATED	8/11/2016 11:43:50 AM
+	31 Large Loss and Catastrophe Call	ALABAMA	13118 - NCCI TRAINING INDEMNITY COMPANY	10/3/2016 9:52:38 AM	Original	Not In Use	SUBMITTED	10/3/2016 9:52:39 AM
+	3 Policy Year	ARIZONA	13118 - NCCI TRAINING INDEMNITY COMPANY		Original	Not In Use	VALIDATED	8/11/2016 2:28:40 PM
+	3 Policy Year	TEXAS	13118 - NCCI TRAINING INDEMNITY COMPANY		Original	Not In Use	VALIDATED	8/11/2016 2:32:38 PM
+	5 Calendar-Accident Year	TEXAS	13118 - NCCI TRAINING INDEMNITY COMPANY		Original	Not In Use	VALIDATED	8/11/2016 11:37:48 AM
+	32 VA Coal Mine Large Loss	VIRGINIA	13118 - NCCI TRAINING INDEMNITY COMPANY	8/26/2016 3:13:46 PM	Original	Not In Use	SUBMITTED	8/26/2016 3:13:46 PM

Financial Data Collection allows you to search and view your data by collection type.



Manuals Library

Filter By State Historical Table of Contents - Show About

- Underwriting Manuals
- Data Manuals
- Reference Manuals
- Previous Editions

Data Manuals

- Data Quality Guidebook
- DCI Reporting Guidebook 2009 Edition
- Electronic Transmission User's Guide
- Financial Call Reporting Guidebook**
- Medical Data Call Reporting Guidebook
- Policy and POC Reporting Guidebook
- Pool Data Reporting Guidebook
- Statistical Plan Manual 2008 Edition
- Unit Statistical Reporting Guidebook

NCCI's **Manuals Library** offers instant access to our current data manuals and guidebooks.

Resources for Reporting Requirements and Communications

NCCI offers a number of resources on ncci.com to provide you with reporting requirements and information for Financial Call data.

- **Financial Call Reporting Guidebook** contains rules and requirements for reporting Financial Calls and completing the Self-Audit Form and Acknowledgment Form. The guide book also includes the editing requirements and the Financial Call Edit Matrix.
- **Data Quality Guidebook** contains the program rules and criteria for each of NCCI's Data Quality Compliance Programs. It also includes NCCI's approach to data quality, details for Cross-Data Type Comparisons, and workflows for data quality best practices.
- **Electronic Transmission User's Guide** contains the requirements for preparing and submitting test and production files for all NCCI data types. It also includes information for receiving data files and extracts electronically.
- **Circulars/FYI Plus Releases** address time-sensitive topics. These documents may include a call to action and/or announce important information needed to report timely and quality data.
- **Data Reporting Page (Financial Calls)** on ncci.com provides tools, resources, publications, and direct access to Webinars on Demand to help you with all of your Financial Call data reporting needs.

Training Opportunities

NCCI is committed to educating data reporting customers by offering two types of training opportunities—Webinars on Demand and Data Workshops.

Webinars on Demand

NCCI's Webinars on Demand are online training modules that you can view and listen to at your convenience. Go to the Learning Center on ncci.com to access the webinars.

Data Workshops

NCCI's training events provide education and instruction on the latest data reporting requirements and tools. Visit ncci.com to see upcoming opportunities.

Contact Us. We're here to assist you Monday–Friday, 8:00 a.m.–8:00 p.m. ET. Call our Customer Service Center at 800-NCCI-123 (800-622-4123) or visit ncci.com and choose **Contact Us** to send an email.



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