

Application Manager User Guide

Agency and Employer Users

Delaware Compensation Rating Bureau, Inc.

Pennsylvania Compensation Rating Bureau

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A. INTRODUCTION

The Application Manager is the common interface for accessing products hosted in the secure section of the DCRB/PCRB website.

This guide offers an overview of the features available to agent users and employers within the Application Manager and provides useful tips for navigating the website. It is recommended that you review this document before using the website.

B. PRIVACY AND SECURITY

The DCRB/PCRB Privacy and Security Statement can be viewed directly from the website. A link to the statement is available on the Sign In screen of the Application Manager.

C. GETTING STARTED

Accessing the Website

The recommended web browser for accessing the Application Manager is Google Chrome. Some features may not function properly when using alternative browsers.

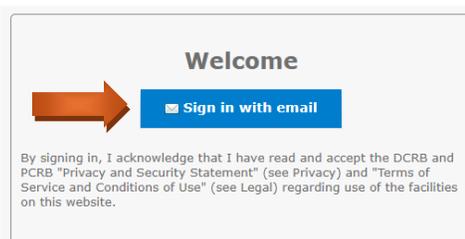
To access the Application Manager, visit:

- Pennsylvania: <https://www.pcrbdata.com/AppMgr/Default.aspx>
- Delaware: <https://www.pcrbdata.com/AppMgr/Default.aspx?StateCode=DE>

Alternatively, you can click on the Application Login button located on the DCRB/PCRB website: www.pcrb.com or www.dcrb.com.

Existing Users – Signing In

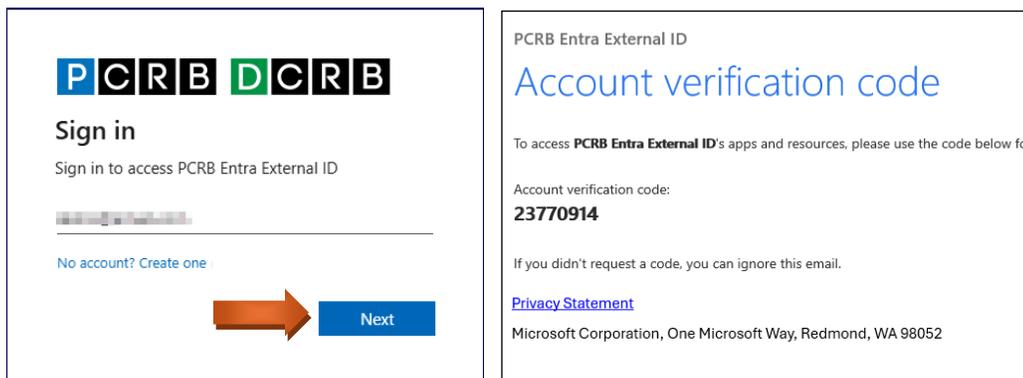
1. On the sign in screen, read the user agreement paragraph, and then click the **Sign in with email** button to proceed. By doing so, you acknowledge and accept the DCRB/PCRB Privacy and Security Statement, as well as the Terms of Service and Conditions of Use for using the website's facilities.



2. If this is your first time accessing the website, select the **No Account? Create One** link.



3. Enter your email address. Click **Next**. After submitting your email address, a verification code will be sent to that email. The verification code is a one-time code that expires after 30 minutes.



4. Check your inbox for the code, then enter it on the website. Click **Sign In** to access your account.



5. If this is your first time accessing the website, you will be prompted to complete this step. Enter your information. In the **Given Name** field, enter your first name, and in the **Surname** field, enter your last name. For the **Display Name**, enter your first and last name. Click **Next**.

PCRB DCRB

Add details

We just need a little more information to set up your account.

Display Name
Display Name

Given Name
Given Name

Surname
Surname

Cancel Next

6. You will be redirected to the **SELECT YOUR PROFILE** screen where you can select your user profile.

PCRB
PENNSYLVANIA
Compensation Rating Bureau

DCRB/PCRB Home Switch to DE

+ Add a Profile

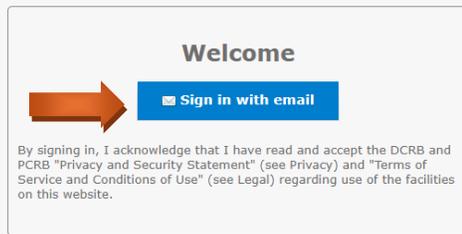
SELECT YOUR PROFILE


Carrier Group User

New Users – Creating a New Account and a User Profile

First time website users must create an account and a user profile before they can access the products within the Application Manager. A single registration will allow access to both Pennsylvania and Delaware data.

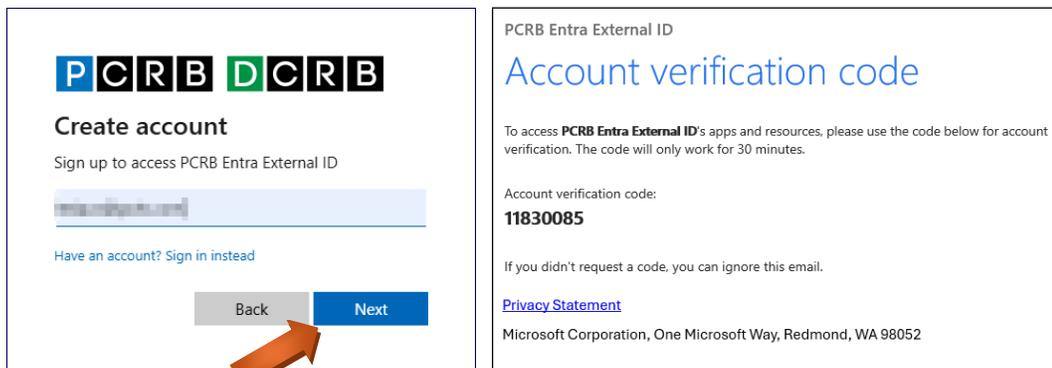
1. On the sign in screen, read the user agreement paragraph, and then click the **Sign in with email** button to proceed. By doing so, you acknowledge and accept the DCRB/PCRB Privacy and Security Statement, as well as the Terms of Service and Conditions of Use for using the website's facilities.



2. Select the **No Account? Create One** link.



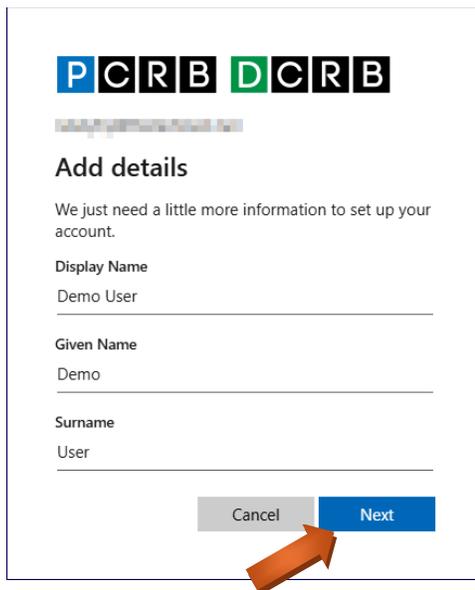
3. Enter your email address. Click **Next**. After submitting your email address, a verification code will be sent to that email. The verification code is a one-time code that expires after 30 minutes.



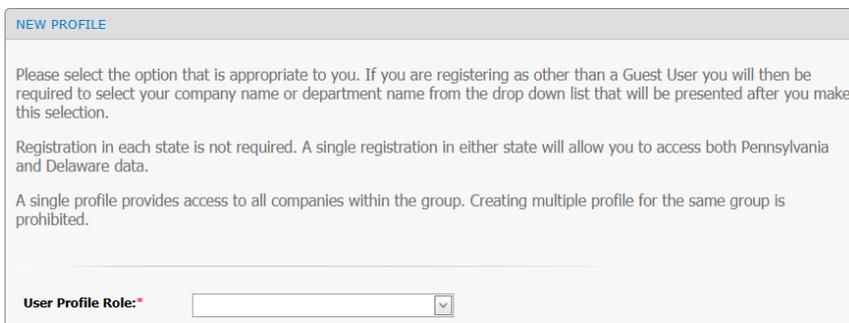
4. Enter the code you received in your email and click **Next**.



5. After verifying your email, you will be prompted to enter a **Display Name**, your **Given Name** (First Name) and **Surname** (Last Name) to set up your account. For the Display Name, enter your full name: First Name and Last Name. Click **Next**.



6. You will be redirected to a screen to create a new user profile. Select the **User Profile Role** option that best describes your role.



- **Agent User** – This is for insurance agents and brokers. Agent Users require approval from their Agency Group Administrator. Individuals applying for the role of Agency Group Administrator (AGA) must be appointed by the agency’s authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the AGA.
- **Carrier Group User** – This is for individuals associated with a DCRB/PCRB member carrier. It requires approval from the Carrier Group Administrator. After selecting this role, you will be required to choose your company name from a drop-down list.
- **Coal Bureau User**
- **Employer User** – This is for business owners. Employer Users require approval from their Employer Group Administrator. Individuals applying for the role of Employer Group Administrator (EGA) must be appointed by the company’s authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the EGA.
- **Guest User** – This is for individuals who are not associated with a carrier group, employers, insurance agents, or brokers. It does not require approval from an administrator.
- **Insurance Department User** – This is for individuals employed by the Pennsylvania or Delaware State Insurance Department. It requires approval from the Insurance Department Administrator.
- **TPA (Third Party Administrator)** – This is for an entity or individual that processes insurance transactions for a carrier. A valid TPA ID is required to register. It requires approval from the Carrier Group Administrator.

7. Complete the **ABOUT YOU** section with the necessary information. For the **Profile Name**, enter a display name to identify the user profile. Profile names are customizable.

The screenshot shows a registration form titled "ABOUT YOU" with the following fields:

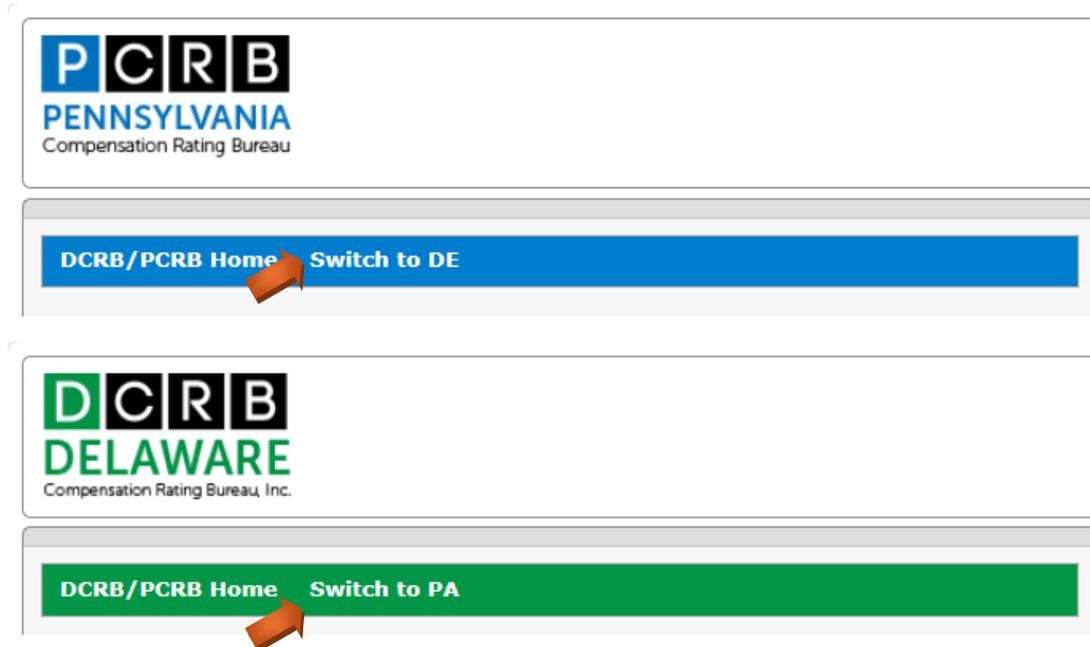
- First Name: Demo
- Last Name: User
- Email: [Redacted]
- Profile Name: [Empty]
- Title: [Empty]
- Phone Number: () - -
- Phone Ext.: [Empty]
- Company Name: [Empty]
- Company Address: [Empty]
- Company City: [Empty]
- Company State: [Dropdown menu]
- Company Zip Code: [Empty]

At the bottom of the form are two buttons: "Cancel" and "Register Now". An orange arrow points to the "Register Now" button.

8. Once you've filled out all the required information, click the **Register Now** button to complete your registration.

Switching Between States

Registering for a user profile in either Pennsylvania or Delaware will allow you to access data for both states. To switch between Pennsylvania (PA) and Delaware (DE), select the **“Switch to PA”** or **“Switch to DE”** links located on the sign-in screen or the "Select Your Profile" screens.

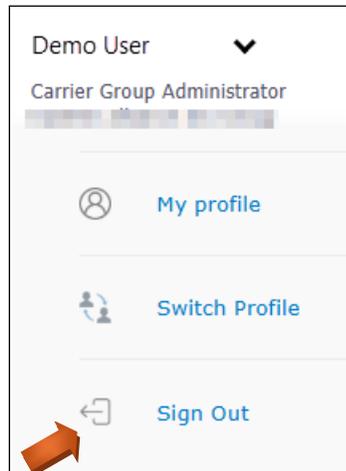


Account Verification and Lockout Policy

- The verification code is automatically generated and sent to the email address associated with the account.
- The verification code is a one-time code valid for 30 minutes from the time of issuance. After this period, the code expires, and you will need to request a new code to proceed.
- You are allowed a maximum of 3 unsuccessful attempts before the account is temporarily locked.
- After the 3rd failed attempt, you will be temporarily locked out from further code entry for 60 seconds.
- If you subsequently enter the incorrect code after the initial 3 failed attempts, the lockout duration will increase.
- Once the lockout period has passed, you may attempt to enter the correct passcode again.

Signing Out of the Website

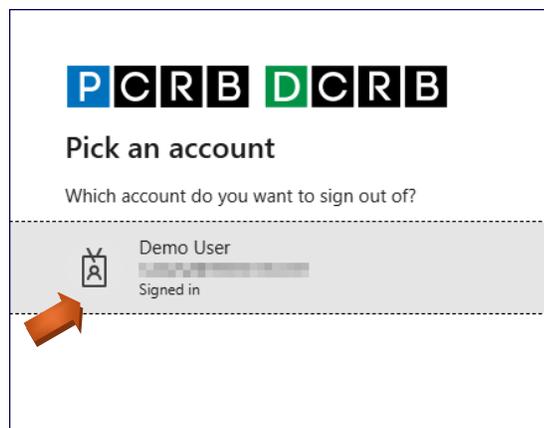
1. In the upper right-hand corner of the screen, hover your mouse pointer over your name. A drop-down menu will appear with the **Sign Out** option.



Some products within the Application Manager have the **Sign Out** link located in the upper right-hand corner of the screen without a drop-down menu.



2. Select **Sign Out**. You will be redirected to a screen where you are asked to select the account you wish to sign out from.



3. After selecting the account, you will be redirected to the Application Manager's sign-in screen, completing the sign-out process.

E. USER PROFILES

The **SELECT YOUR PROFILE** screen allows you to easily choose and manage your profiles. You can have a single profile or multiple profiles, depending on your role and the organization you work for. You can also create new profiles as needed.

Upon successfully logging into the Application Manager, you will be directed to a screen displaying your available user profiles as **tiles**. Each tile will display the profile role, the associated company or organization, and the profile status.

User Profile Status

Definitions:

- **Active:** The user profile is authorized to access the system.



- **Inactive:** The user profile has been deactivated due to inactivity. Profiles that have remained inactive (with no sign-ins) for the past three years will be automatically deactivated to maintain system security and efficiency. If a profile is deactivated, it can be reactivated by contacting Central Support.



- **Awaiting Approval:** The user profile is pending approval by the group administrator. It has not yet been fully approved and is awaiting review or confirmation.

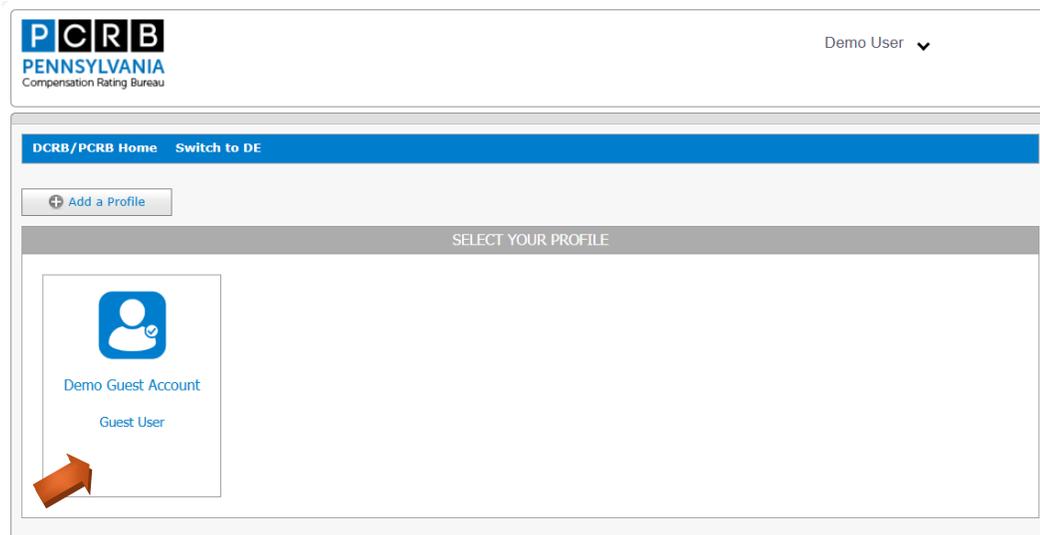


- **Suspended:** The user profile has been suspended due to security reasons or for other administrative reasons. The suspension may be temporary or permanent, depending on the issue.

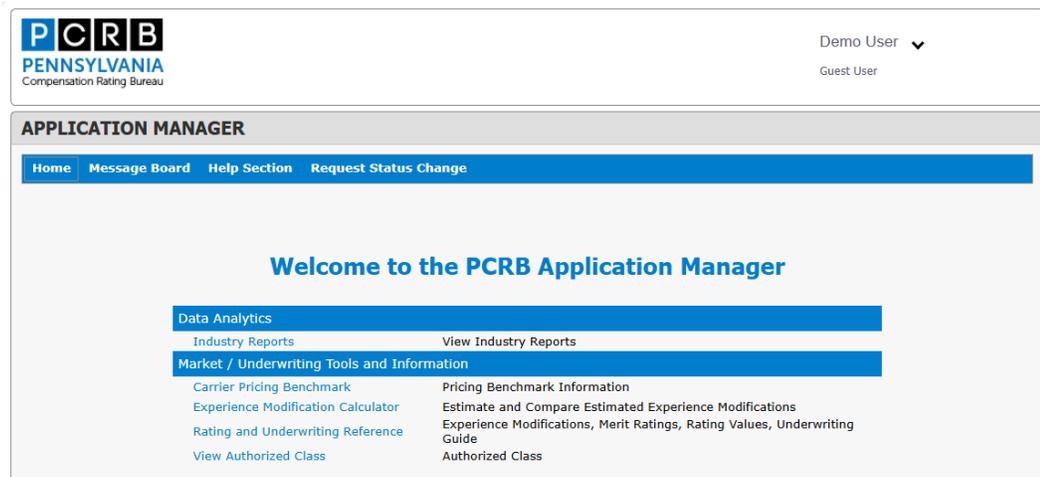


Selecting a User Profile

1. To select a profile, click on the corresponding tile.



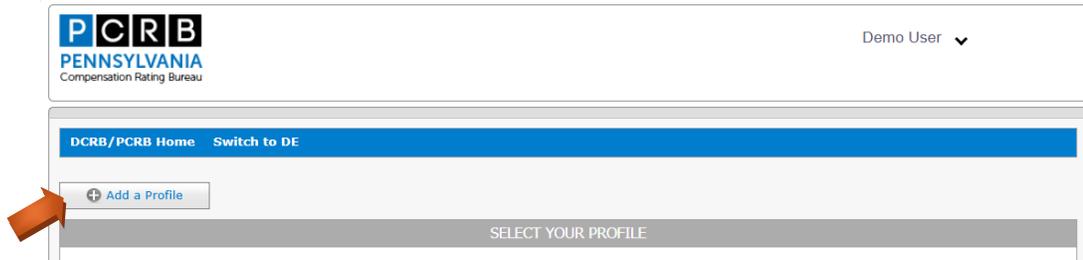
2. After selecting the profile, you will be redirected to the home screen which displays all the products that the profile is authorized to access.



Creating a New User Profile

1. If you need to create a new profile, select the **Add a New Profile** button.
 - A single profile provides access to all companies within the group, so you will only need one profile to access everything related to that group.

- Creating multiple profiles for the same group is not allowed. You should only create additional profiles if needed for different roles or groups.



2. You will be redirected to a screen to create a new user profile. Select the **User Profile Role** option that best describes your role.

A screenshot of the 'NEW PROFILE' form. The title 'NEW PROFILE' is in blue. Below the title is a paragraph of instructions: 'Please select the option that is appropriate to you. If you are registering as other than a Guest User you will then be required to select your company name or department name from the drop down list that will be presented after you make this selection.' Below that is another paragraph: 'Registration in each state is not required. A single registration in either state will allow you to access both Pennsylvania and Delaware data.' Below that is a third paragraph: 'A single profile provides access to all companies within the group. Creating multiple profile for the same group is prohibited.' At the bottom of the form is a dropdown menu labeled 'User Profile Role:' with a red asterisk next to it.

- **Agent User** – This is for insurance agents and brokers. Agent Users require approval from their Agency Group Administrator. Individuals applying for the role of Agency Group Administrator (AGA) must be appointed by the agency’s authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the AGA.
- **Carrier Group User** – This is for individuals associated with a DCRB/PCRB member carrier. It requires approval from the Carrier Group Administrator. After selecting this role, you will be required to choose your company name from a drop-down list.
- **Coal Bureau User**
- **Employer User** – This is for business owners. Employer Users require approval from their Employer Group Administrator. Individuals applying for the role of Employer Group Administrator (EGA) must be appointed by the company’s authorizing officer. Complete the **AUTHORIZING OFFICER** section of the form if applying to become the EGA.
- **Guest User** – This is for individuals who are not associated with a carrier group, employers, insurance agents, or brokers. It does not require approval from an administrator.
- **Insurance Department User** – This is for individuals employed by the Pennsylvania or Delaware State Insurance Department. It requires approval from the Insurance Department Administrator.

- **TPA (Third Party Administrator)** – This is for an entity or individual that processes insurance transactions for a carrier. A valid TPA ID is required to register. It requires approval from the Carrier Group Administrator.
3. Complete the **ABOUT YOU** section with the necessary information. For the **Profile Name**, enter a display name to identify the user profile. Profile names are customizable.

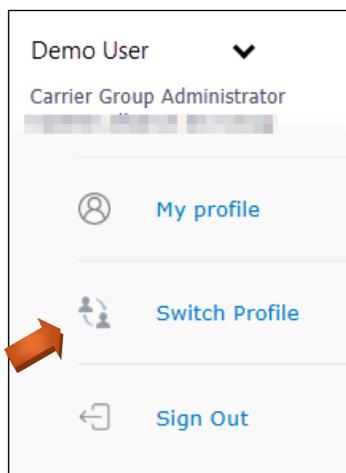
The screenshot shows a registration form titled "ABOUT YOU". It contains the following fields: First Name:*, Last Name:*, Email:*, Profile Name:*, Title:*, Phone Number:*, Phone Ext.:, Company Name:*, Mailing Address:*, Mailing City:*, Mailing State:*, and Mailing Zip Code:*. At the bottom of the form, there are two buttons: "Cancel" and "Register Now". An orange arrow points to the "Register Now" button.

4. Once you've filled out all the required information, click the **Register Now** button to complete your registration. The new user profile can now be selected from the **SELECT YOUR PROFILE** screen.

Switching Between User Profiles

If you want to switch to a different profile after you've selected one, follow these steps:

1. On the upper right-hand corner of the screen, hover your mouse pointer over your name.
2. From the dropdown menu, click the **Switch Profile** option.

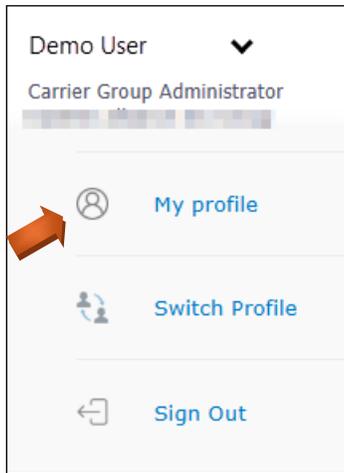


3. You will then be redirected back to the **SELECT YOUR PROFILE** screen, where you can choose another profile.

Viewing User Profile Information

If you want to view the profile information after selecting one, follow these steps:

1. On the upper right-hand corner of the screen, hover your mouse pointer over your name.
2. From the dropdown menu, click the **My Profile** option.



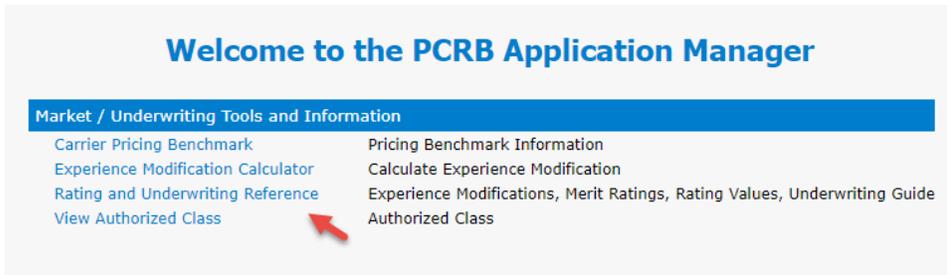
3. Update profile information as necessary and click **Save** to confirm the changes.
 - **Profile Name** – This is the display name to identify the user profile. Profile Names are customizable.
 - **Title**
 - **Phone Number + Ext**
 - **Company Name**
 - **Mailing Address**
 - **Mailing City**
 - **Mailing State**
 - **Mailing Zip Code**
 - **Agent License** (*Only for Agent Users*)
 - **Agent NPN** (*Only for Agent Users*)
 - **Receive Email** (*Only for Administrators*) – Check this box to receive admin notifications

G. MENU OPTIONS

1. Home

The **Home** screen is displayed upon selecting your user profile. It provides an overview of the products available to you within the Application Manager. Additionally, alerts such as new messages and approval requests (for Administrators only) are shown.

- To launch a product, click on the product name.



2. Message Board

Select **Message Board** from the main menu to view important website announcements, such as service interruptions, application updates, and new features.

- To view details, click the **[+]** next to the announcement.

Message Board		
	Subject	Received
	DCRB/PCRB Website Maintenance	05/02/2019 11:41 AM EST
	DCRB/PCRB Web Site Maintenance	03/11/2019 12:30 PM EST

3. Help Section

Select **Help Section** from the main menu to access user guides and instructions for various products.

- To view the guides, you must have Adobe Acrobat Reader installed on your device.
- To open a guide, click the PDF icon next to the document.

HELP SECTION			
	Description	Size	Date Posted
	Application Login User Guide	0.59 Mb	08/11/2021
	Delaware Insurance Plan Depopulation Listing	0.03 Mb	01/09/2018
	Indemnity Data Manager User Guide	0.67 Mb	08/11/2021

4. Request Status Change (Guest Users Only)

Select **Request Status Change** from the main menu to submit a request to change your user profile role. Status change requires approval from the group administrator. If a request is submitted, your access to the website will be temporarily unavailable until the request is approved by the administrator.

5. Application Access Requests (Agent and Employers Users Only)

Select **Application Access Requests** from the main menu to submit a request to the group administrator for access to use a product.

On the Application Access Requests screen, check the box of the product(s) for which you need access to and then click the **Request** button.

APPLICATION ACCESS REQUESTS			
Request?	Application Name	Description	Date Requested
<input checked="" type="checkbox"/>	Invoice Online	View Invoices	
<input checked="" type="checkbox"/>	Medical Data Manager	View, Enter and Edit Medical Information	
<input checked="" type="checkbox"/>	Policy Data Manager	View, Enter and Edit Policy Information	
<input type="checkbox"/>	Test Audit Online	Test Audit Statistics - Download	
<input type="checkbox"/>	Unit Data Manager	View, Enter and Edit Unit Stat Information	
<input type="checkbox"/>	WC Data Pro	View, compare and export premium and loss data	
Count: 8			



6. Agent Admin (Agency Group Administrator Only)

The Agency Group Administrator functions are performed via the **Agent Admin** menu. Select an option from the drop-down menu to manage users and permissions.

7. Agency Information (Agent Users Only)

Select **Agency Information** from the main menu to view the physical address of the agency.

8. Employer Admin (Employer Group Administrator Only)

The Employer Group Administrator functions are performed via the **Employer Admin** menu. Select an option from the drop-down menu to manage users and permissions.

9. Employer Information (Employer Users Only)

Select **Employer Information** from the main menu to view the physical address of the agency.

H. AGENCY/EMPLOYER GROUP ADMINISTRATORS

A key element of the Application Manager is the establishment of Agency Group Administrators (AGA) and Employer Group Administrators (EGA). The primary role of a group administrator is to manage the users of their group. The group administrator will be responsible for maintaining all user access privileges to the site and to the products and their data. It is the responsibility of the group administrator to manage their user community. The DCRB/PCRB will communicate all system informational items to the group administrators.

Each agency and employer group may have multiple Administrators assigned to the group. All Administrators will have access to all products available to the group and to all their data.

If an additional or replacement group administrator is needed, contact Central Support for information on how to make those changes.

a. Manage User Profile Requests

When an individual registers (or a Guest User submits a status change) to become an Agent Group user or an Employer Group User, the group administrator will be notified via email of the pending request.

To approve or reject user requests:

- 1) Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu. Alternatively, the group administrator may select the user request link from the Home screen.

• [There is 1 user request that require your review.](#)

- 2) On the Maintain Users screen, check the box for "Show pending user requests".

Show pending user requests

MAINTAIN USERS						
	Name	Profile Name	Type	Active?	Status	Phone Number
  	User, Demo	Demo User	Employer User		Approval Requested	(717) 632-4500
Count=1						
Page 1 of 1 (1 items) < [1] >						Page size: 10

- 3) Select the  icon to view the user's profile.
- 4) On the User Profile screen, click the **Approve** button to approve the user or click the **Reject** button to reject the user.

- 5) Click the **OK** button on the confirmation dialog box displayed.
- 6) Click the **Close** button on the User Profile screen to return to the Maintain Users screen.

b. Manage Application Access

When an Agent or Employer User submits a request for access to products, the group administrator will be notified via email of the pending request. Below is an example of the email:

*From: noreply@pcrb.com
Subject: New Application(s) Request*

Dear Administrator,

A user is requesting access to the following application(s):

- *Policy Data Manager*
- *Unit Data Manager*

User information:

*Name: Demo User
Email: demoemail@email.com
Phone: (123) 456-7890*

Login to the DCRB/PCRB Application Login to assign the requested applications to the user.

*Thank you,
Central Support
(215) 320-4933
centralsupport@pcrb.com*

To approve the application access request:

- 1) Select the application access requests link from the Home screen.



- 2) On the Application Access Requests screen, click **[+]** next to the requestor's last name to view the details of the request.

APPLICATION ACCESS REQUESTS						
	Last Name	First Name	User Profile Role	Company Name	Email	Phone
	User	Demo	Employer User	PCRB	demoemail@email	(123)456-7890
Count: 1						

- 3) Select the applications that the Agent or Employer User will be given access to and then click the **Approve** button or select the applications that the Agent or Employer User will not be given access to and then click the **Reject** button.

Select	Application Name	Date Requested
<input checked="" type="checkbox"/>	Policy Data Manager	03/26/2019 @ 04:03 PM EST
<input type="checkbox"/>	Unit Data Manager	03/26/2019 @ 04:03 PM EST
Count: 2		

Approve
 Reject

- 4) Click the **OK** button on the confirmation dialog box displayed.

To modify a user's application access:

- 1) Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu.
- 2) On the Maintain Users screen, select the icon to view the user's profile.
- 3) Select **Assign Application(s)**.

[Update User Profile](#)

Assign Carrier(s) v

Assign Application(s) v

[Close](#)

- 4) Check the **Authorize to Use** product box to grant the Agent or Employer User access to the product or uncheck the box to remove their access. Changes made are saved automatically.

Some products can be assigned the “View Only” access which allows the user to access the product in “read only” mode where the data cannot be altered or modified.

The checkbox will be grayed out for products that are assigned to all users by default. The access cannot be modified.

Assign Application(s) ^			
Application Name	Description	Authorized to Use	View Only
Carrier Pricing Benchmark	Pricing Benchmark Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Experience Modification Calculator	Calculate Experience Modification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invoice Online	View Invoices	<input type="checkbox"/>	<input type="checkbox"/>
Medical Data Manager	View, Enter and Edit Medical Information	<input type="checkbox"/>	<input type="checkbox"/>
Policy Data Manager	View, Enter and Edit Policy Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rating and Underwriting Reference	Experience Modifications, Merit Ratings, Rating Values, Underwriting Guide	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Test Audit Online	Test Audit Statistics - Download	<input type="checkbox"/>	<input type="checkbox"/>
Unit Data Manager	View, Enter and Edit Unit Stat Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Authorized Class	Authorized Class	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WC Data Pro	View, compare and export premium and loss data	<input type="checkbox"/>	<input type="checkbox"/>

- 5) Click the **OK** button on the confirmation dialog box displayed.
- 6) Click the **Close** button to return to the Maintain Users screen.

c. Remove User Profiles

It is the responsibility of the group administrator to remove users and/or administrators when necessary. This could occur when someone has left the company or assumed other responsibilities. Failure to do this means that the unauthorized personnel could access the data.

Note: Removing a user profile does not delete the account, but it removes all access to the group data. The user will be assigned the “Guest User” role.

To remove a user from the group:

- a) Select **Agent Admin** or **Employer Admin** from the main menu and then select **Maintain Users** from the drop-down menu.
- b) On the Maintain Users screen, select the  icon of the user that will be removed from the group.
- c) Click the **OK** button on the confirmation dialog box displayed.
- a) The Agent or Employer User will receive an email indicating that their user profile role has been changed to a guest user.

I. SUPPORT

Questions regarding the Application Manager should be directed to DCRB/PCRB Central Support.

- Phone: 215-320-4933
- Email: centralsupport@pcrb.com or centralsupport@dcrb.com

An initial response to inquiries will be provided by a team member within 48 to 72 hours from the date of receipt.