

NEW YORK CARRIER ADMINISTRATION SYSTEM USER GUIDE

THE NEW YORK CARRIER ADMINISTRATION SYSTEM is designed to allow carriers to validate or update their current contact information.

BROWSER REQUIREMENTS

INTERNET EXPLORER 9 and 11

CHROME

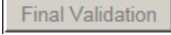
FIREFOX



KEYWORDS

Address Type: There are 28 Address Types. Ex: Home Office, Legal, etc. Note: Not all address types require contact information.

Verify/Update:  Save your verified and/or updated data by clicking this button.

Final Validation:  The "Final Validation" button should only be clicked after all information for all appropriate Address Type(s) has been verified. All information on NYCAS is retained but unprocessed until the "Final Validation" button has been clicked. Note: Once the "Final Validation" button is clicked all data is locked and the system becomes Read Only.

Primary Approved

Primary: The "Primary" checkbox signifies the main address for the department.

Approved: When an Address is verified, the "Approved" box will be checked.

GETTING STARTED: INITIAL SCREEN

The first screen you see when you enter the NYCAS system will be a list of Carriers that you are allowed to access.

Select a carrier by clicking on the list below.

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NYCIRB Code	ABC Insurance Group	NCCI Code	NAIC Code
99998	ABC Casualty Insurance Company	21233	21123
99999	ABC Insurance Company	21212	21212
			Final Validation

Search by Address, Address Type, Email or Name

EDIT PANELS

After selecting a carrier the Contact / Address Information and Address Type panels will appear. These two panels work in conjunction with each other.

Panel 1:

Addresses for Home office
◀ 1 of 2 ▶
✖ Delete Address

Primary Approved

* Mailing Address:

Address 2:

Address 3:

* City:

* State:

* Zip:

* Contact First Name:

Contact Middle Name:

* Contact Last Name:

Contact Department:

* Title:

* Phone Number: ext.

* Fax Number: ext.

* Email:

Fields Marked with * Are Required

Panel 2:

CODE 99998 Address Types
+ Add New Address

<input type="checkbox"/> Home office (2) <input type="checkbox"/> 14 Month Policy Verification Report (0) <input type="checkbox"/> Overdue Rpts (1) <input type="checkbox"/> Follow-up carrier fines (1) <input type="checkbox"/> Membership (1) <input type="checkbox"/> Local Underwriting Office (1) <input type="checkbox"/> Financial Data (1) <input type="checkbox"/> Legal Inside Counsel (1) <input type="checkbox"/> Bulletins (1) <input type="checkbox"/> Actuarial (0) <input type="checkbox"/> Unit Stat Tape (0) <input type="checkbox"/> Claim Contact (0) <input type="checkbox"/> Retro (0) <input type="checkbox"/> Assessments (0)	<input type="checkbox"/> Unit Stat (0) <input type="checkbox"/> 18 Month Expected Cards Report (0) <input type="checkbox"/> Carrier Fines-unpaid (0) <input type="checkbox"/> Fines mgmt (0) <input type="checkbox"/> Payroll Audit (0) <input type="checkbox"/> Policy Tape (0) <input type="checkbox"/> Legal (1) <input type="checkbox"/> Inspection (0) <input type="checkbox"/> Administrative (0) <input type="checkbox"/> Exp. rating (0) <input type="checkbox"/> CPAP (0) <input type="checkbox"/> Safety Compliance (0) <input type="checkbox"/> HC fees (0) <input type="checkbox"/> Policy TXN Rejection (0)
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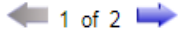
Panel 1 - Displays the address and contact information for an Address Type (defaulted to Home Office). This is where you verify and update the Address data.

All updates should be typed directly into **Panel 1**. All fields marked with * are required.

Clicking on an Address Type in **Panel 2** populates **Panel 1**.

✖ Delete Address - Deletes the address that you are currently viewing.

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- If the Address Type has multiple addresses you will see these navigation arrows to page through them.

Verify / Update

- Verifies the Address you are currently looking at or updating. Each address must be verified individually.

Panel 2 - Allows you to pick the Address Type that you want to view in **Panel 1**.

Home office (2)

Address Types highlighted in **Yellow** indicate unverified addresses. The number (2) in parenthesis signifies that there are two Addresses in the Home Office Address Type.

Legal (1)

Address Types highlighted in **Green** indicate addresses have been verified. The number (1) in parenthesis signifies that there is one Address in the Legal Address Type.

Unit Stat (0)

If the Address Type is not highlighted then it contains no addresses.

+ Add New Address

- Use this button to add new addresses.

ADD NEW ADDRESS

Once you click **+ Add New Address** these panels will be displayed:

Panel 3:

? Add New Address To 99998 Back to Home Office

Primary

* Mailing Address:

Address 2:

Address 3:

* City:

* State:

* Zip:

* Contact First Name:

Contact Middle Name:

* Contact Last Name:

Contact Department:

* Title:

* Phone Number: ext.

* Fax Number: ext.

* Email:

Fields Marked with * Are Required

Panel 4:

CODE 99998 Address Types

Select the Address Types to Add This Address To

<input checked="" type="checkbox"/> Home office (2)	<input type="checkbox"/> Unit Stat (0)
<input type="checkbox"/> 14 Month Policy Verification Report (0)	<input type="checkbox"/> 18 Month Expected Cards Report (0)
<input type="checkbox"/> Overdue Rpts (1)	<input type="checkbox"/> Carrier Fines-unpaid (0)
<input type="checkbox"/> Follow-up carrier fines (1)	<input type="checkbox"/> Fines mgmt (0)
<input type="checkbox"/> Membership (1)	<input type="checkbox"/> Payroll Audit (0)
<input type="checkbox"/> Local Underwriting Office (1)	<input type="checkbox"/> Policy Tape (0)
<input type="checkbox"/> Financial Data (1)	<input type="checkbox"/> Legal (1)
<input type="checkbox"/> Legal Inside Counsel (1)	<input type="checkbox"/> Inspection (0)
<input type="checkbox"/> Bulletins (1)	<input type="checkbox"/> Administrative (0)
<input type="checkbox"/> Actuarial (0)	<input type="checkbox"/> Exp. rating (0)
<input type="checkbox"/> Unit Stat Tape (0)	<input type="checkbox"/> CPAP (0)
<input type="checkbox"/> Claim Contact (0)	<input type="checkbox"/> Safety Compliance (0)
<input type="checkbox"/> Retro (0)	<input type="checkbox"/> HC fees (0)
<input type="checkbox"/> Assessments (0)	<input type="checkbox"/> Policy TXN Rejection (0)

Panel 3 - Is used to add new contact information.

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Panel 4 - One address / contact information can apply to multiple Address Types . After entering address and contact information in **Panel 3**, check the appropriate Address Type(s) box in **Panel 4**.

Click the  button on **Panel 3** to submit the data.

VERIFICATION AND FINAL VALIDATION

As shown below, the green progress bar at the bottom of the Initial Screen will fill up as you continue to verify addresses.

Each Carrier row will also be highlighted green with a red “verified” indicator as you verify the addresses.

NYCIRB Code	ABC Insurance Group	NCCI Code	NAIC Code
99998	ABC Casualty Insurance Company	21233	21123
99999	ABC Insurance Company - <i>verified</i>	21212	21212
9%			Final Validation

Once Verification is at 100%, the “**Final Validation**” button will become active.

NYCIRB Code	ABC Insurance Group	NCCI Code	NAIC Code
99998	ABC Casualty Insurance Company - <i>verified</i>	21233	21123
99999	ABC Insurance Company - <i>verified</i>	21212	21212
100% Complete (Verification)			Final Validation

After clicking the **Final Validation** button, your contact data will be submitted to NYCIRB and the system will go into **View Mode**.

View Mode is read only and allows you to look through the addresses, but not alter them. If you need to change data after “**Final Validation**”, please contact NYCIRB at nycas@nycirb.org.

View Mode - Addresses Have Been Validated. If you need to make adjustments please contact Josephine Gonzalez at (212) 697-3535 - Ext. 112			
NYCIRB Code	ABC Insurance Group	NCCI Code	NAIC Code
99998	ABC Casualty Insurance Company - <i>verified</i>	21233	21123
99999	ABC Insurance Company - <i>verified</i>	21212	21212
100% Complete (Verification)			Final Validation

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GLOBAL SEARCH

The **Global Search** allows you to search for addresses across your entire authorized Carrier Group.

Search criteria can include any contact information (i.e. street name, person's name, e-mail, phone number, etc.) or Address Type. (A list of available Address Types can be found in Appendix A) The search results will display a list of all Address Types that contain the search criteria.

Search by **Address**, **Address Type**, **Email** or **Name**

ABC

[✕ Clear Results](#)

NYCIRB Code ▲▼	Address Type ▲▼	Name ▲▼	Address ▲▼	Email ▲▼
99998	Financial Data	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Legal Inside Counsel	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Home office	Jack White	101 Blank Street, New York, NY	jwhite@abc.org
99998	Local Underwriting Office	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Overdue Rpts	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Follow-up carrier fines	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Home office	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Membership	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Bulletins	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org
99998	Legal	Steven Seagal	23 ABC Street, New York, NY	sgal@abc.org

GLOSSARY

Address Type: Department or business function

Approved: Signifies verified address / contact information for an Address Type

Final Validation: Sends all information to NYCIRB and turns all information to View Only mode

Primary: The main address for an Address Type

Verify / Update: Saves address / contact information for an Address Type

APPENDIX A

List of Address Types:

Home Office	Unit Stat
14 Month Policy Verification Report	18 Month Expected Cards Report
Overdue Rpts	Carrier Fines-unpaid
Follow-up Carrier Fines	Fines mgmt
Membership	Payroll Audit
Local Underwriting Office	Policy Tape
Financial Data	Legal
Legal Inside Counsel	Inspection
Bulletins	Administrative
Actuarial	Exp. Rating
Unit Stat Tape	CPAP
Claim Contact	Safety Compliance
Retro	HC fees
Assessments	Policy TXN Rejection