SearchPoint
User's Guide

WCIO Searchpoint Version 1.1

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WCIO SearchPoint

I. Introduction

The Workers Compensation Insurance Organization (WCIO) is a voluntary association of statutorily authorized or licensed rating, advisory, or data service organizations that collect workers compensation insurance information in one or more states. The purpose of the WCIO is to provide a forum for the exchange of information about workers compensation insurance.

The WCIO develops and provides the Workers Compensation Data Specifications Manual which is a compilation of several sets of specifications. The specifications provide standardized formats for electronic exchange of information between Data Collection Organizations (DCOs) and their members.

WCIO SearchPoint is a new interactive application that features content from the WCIO Workers Compensation Data Specifications Manuals, Data Dictionary and Code Lists all in one central location. SearchPoint offers users a new and more efficient method to use the various WCIO products. This application will allow users to view and search the manuals by product and by specific key terms.

SearchPoint provides users the opportunity to search, view and print information from one "point". This eliminates the need to toggle among products and screens. For example, if you search on a data element, the application will return the definition, format, data type, position, size, reporting requirement, data population rules, notes, applicability and valid codes for that specific data element across all data products.

Note: WCMED and WCINDEMNITY are not included in SearchPoint.

This guide will provide an overview of the functions available within SearchPoint and helpful hints for using the application.

It is recommended that the user read this entire document before using SearchPoint.
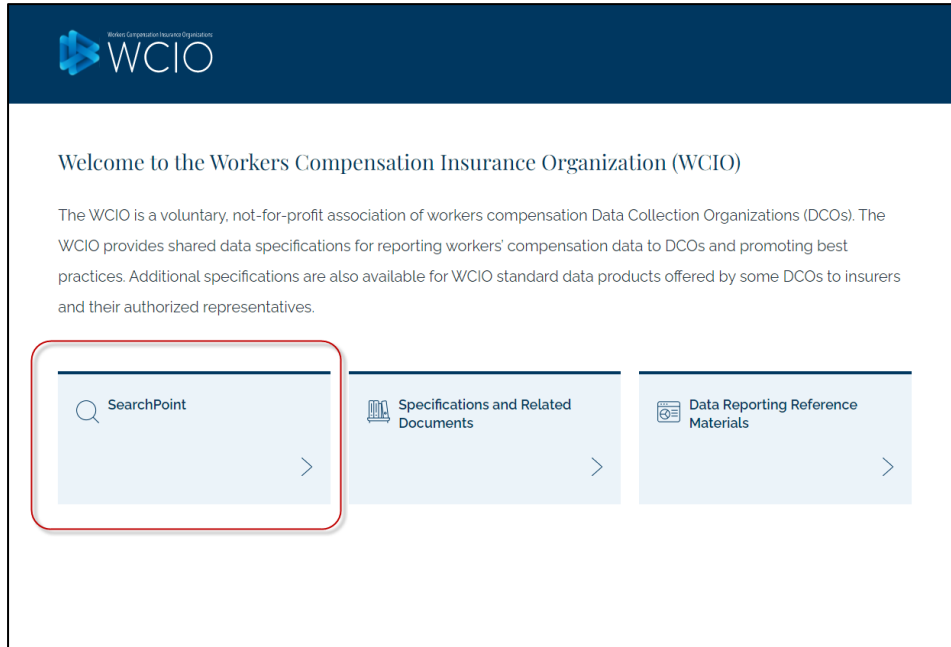
II. System Requirements

In order to access SearchPoint, users must have access to the internet. SearchPoint is an internet-based system that is compatible with Internet Explorer 6+, Mozilla Firefox 3+ and Google Chrome 4+. The application may be accessed via a link on the WCIO's web site at *www.wcio.org*.
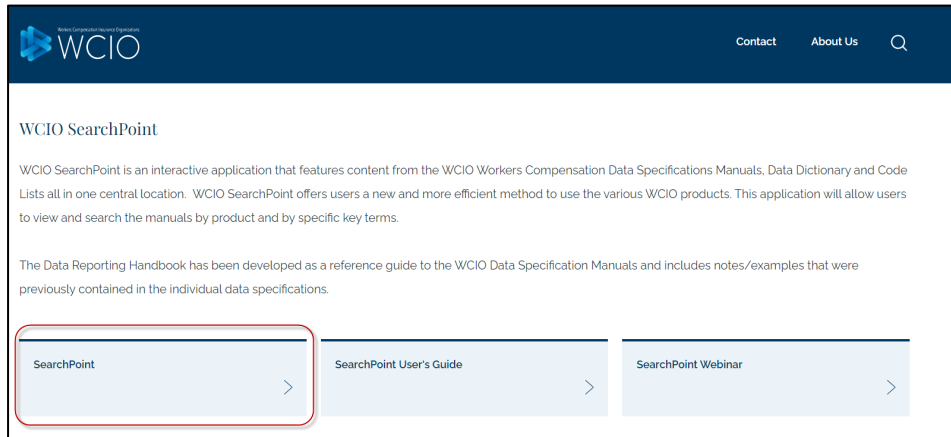
SearchPoint also requires Adobe Reader for generating reports. If you do not have Adobe Reader installed, it is available as a free download at *http://get.adobe.com/reader/*.
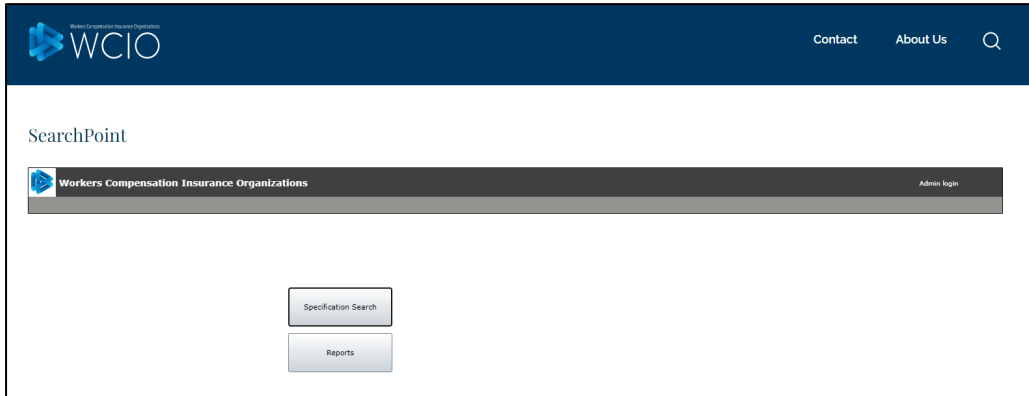
III. Getting Started

SearchPoint is accessed via a link on the WCIO website, *www.wcio.org*. To locate the SearchPoint application link, navigate to the WCIO website and click on **SearchPoint** on the left button.

The SearchPoint page contains the application link, as well as the SearchPoint User's Guide and SearchPoint Webinar. To launch the application click on **SearchPoint Application**.

After clicking the link, the following screen is returned. This is the landing page, or home screen, of the application.

Upon entering SearchPoint, the user will be presented with two options: **Specification Search** and **Reports**.

Specification Search: Use this button if you would like to search. This section allows the user to enter filter criteria and search the data specifications by element name or by specification. The user may pull up a full specification to view or enter key terms to filter their search of all the specifications at once.

Reports: Use this button to generate a static PDF document. SearchPoint creates Adobe PDF files of the Data Specifications Manual and the Data Dictionary to be used for printing or reading purposes. The DCO Contacts for each specification are also located in Reports.
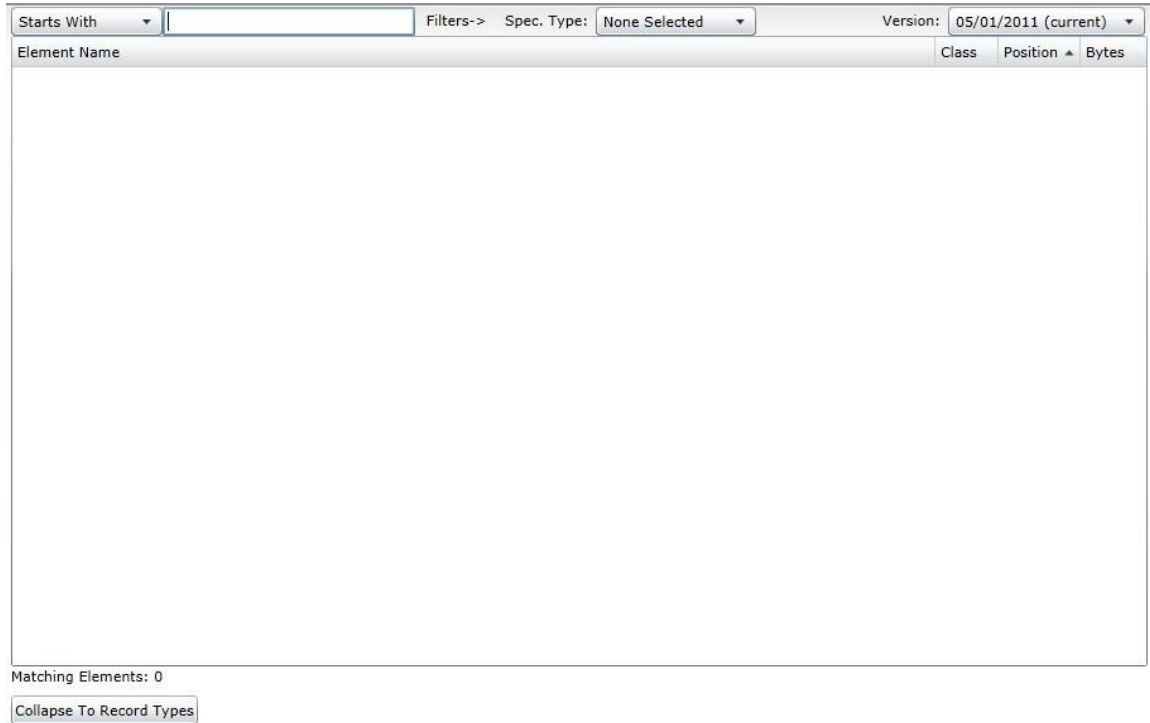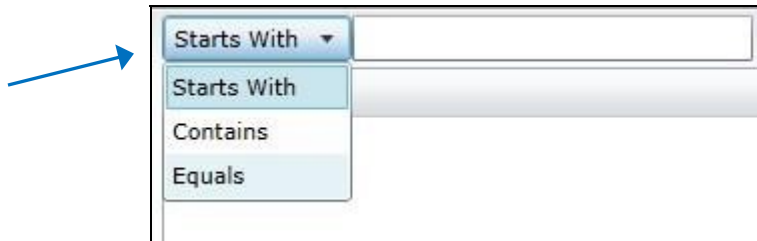

IV. Specification Search

By selecting **Specification Search**, the user is presented with a blank search screen. To begin the query, the user must select search criteria. There are a few ways to go about conducting a search in this application; the steps for completing these searches are explained further in this section. Keep in mind that you are searching by Element Name (field name).

The most common type of search is a text search. Simply click into the text box and type in the data element name. When doing a text search, the user has the option to perform a Starts With, Contains or Equals search.

- *Starts With* – Enter the first couple letters of what you're looking for, as you enter letters more search results will be returned.

- *Contains* – If you're unsure of the exact name, you can type in a key term and all results that contain that word will be displayed.

- *Equals* – Use this filter when you know the exact element name that you need.

To access the different search types, click the drop-down next to the search field.

As you begin typing in the search field, SearchPoint will start filtering through the matching elements. Each matching element is displayed under its corresponding Record Type and Specification.

For example if the user selects **Starts With** and enters "name of" in the search field, the following results are returned.

	Element Name	Class	Position ▲	Bytes
Starts With ▼	name of	Spec. Type: None Selected ▼	Version: 10/04/2011 (current) ▼	Collapse To Record Types
◢ Specification: GENERAL (1 item)				
◢ Record Type: RTC = 00 (Electronic Transmittal Record) (1 item)				
▷ NAME OF DATA PROVIDER CONTACT		AN	78-102	25
◢ Specification: WCCNTL (1 item)				
◢ Record Type: RTC = 00 (Data Record) (1 item)				
▷ NAME OF INSURED		AN	62-141	80
◢ Specification: WCCRIT (2 items)				
◢ Record Type: RTC = 1 (Header Record) (2 items)				
▷ NAME OF INSURED		AN	63-152	90
▷ NAME OF DCO CONTACT		AN	170-194	25
◢ Specification: WCMODS (1 item)				
◢ Record Type: RTC = 04 (Name Record) (1 item)				
▷ NAME OF INSURED		AN	51-140	90
◢ Specification: WCNOA (7 items)				
◢ Record Type: RTC = 02 (Name Record) (1 item)				
▷ NAME OF INSURED		AN	55-144	90
◢ Record Type: RTC = 09 (Supplemental/Elections Information Record) (1 item)				
▷ NAME OF APPLICANT CORPORATE OFFICER, SOLE PROPRIETOR, PARTNER, OR MEMBER OF A LIMITED LIABILITY COM	AN	51-110	60
◢ Record Type: RTC = 11 (Prior Policy Insurance Record) (3 items)				
▷ NAME OF PRIOR POLICY INSURANCE COMPANY		AN	207-246	40
▷ NAME OF PRIOR POLICY INSURANCE COMPANY		AN	247-286	40
▷ NAME OF PRIOR POLICY INSURANCE COMPANY		AN	287-326	40

Matching Elements: 177

All element names that begin with "Name of" have been returned in the search. The results are grouped by Specification and Record Type. These rows are distinguished by different colors. The more text entered in the search field, the smaller the amount of returned Matching Elements. At the bottom of the screen, notice there is a number given as to the amount of **Matching Elements**.

To end the search at any time, or start a new search, click on **Return to Main Menu** on the gray toolbar. This will bring the user back to the home screen.

Another option when doing a Specification Search is to filter by specification. Click on the dropdown next to **Spec. Type** and choose a specification to display.

This view displays all of the chosen specification's records in order by record type code and then by position. This is essentially the record layout of the specification.
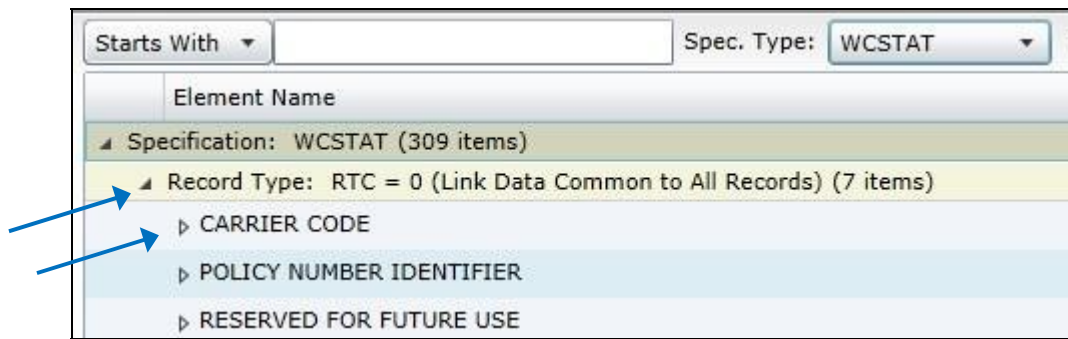
The user may switch the sort order by clicking on the column headings: Element Name, Class, Position and Bytes. It is also possible to rearrange the columns by clicking on the column heading and dragging it to the left or right.

To find a specific record type and view only that record, click on the button **Collapse To Record Types**. This will collapse all of the information down and show only the record types. The user may then expand records individually by clicking on the arrow to the left of the Record Type.

The small arrows to the left of each Specification, Record Type and Element Name are the expand/collapse buttons. To find out more information about a particular element or record, click on the arrow to expand the field.
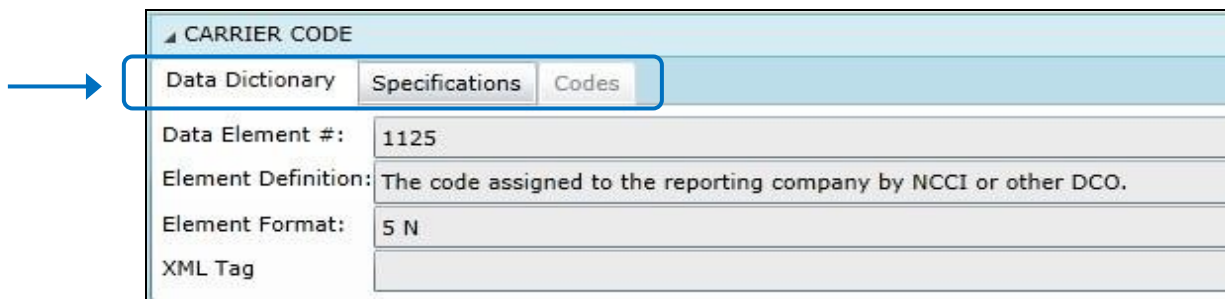
Once expanded, the user can view three tabs of information for each element. These tabs are **Data Dictionary**, **Specifications** and **Codes**.

The first tab, **Data Dictionary**, contains information from the WCIO Data Dictionary. The Data Dictionary tab displays the following information:

- **Data Element #:** The unique number assigned to the data element name contained in the flat file specification.
- **Element Definition:** A brief description that explains the meaning of the data element. The definition will apply to all WCIO products although the exact use of the data element will be governed by the individual products and record types.
- **Element Format:** Description of the data type and how the data is interpreted in the file.
- **XML Tag:** Name given to the data element tag contained in the XML specification.

The **Specifications** tab contains information found in the WCIO Data Specifications Manual. This tab displays all of the reporting instructions pertaining to the element within those positions. Each element's reporting instructions have been categorized into three main components: Reporting Requirements, Notes and Population Rules.

The Specifications tab displays the following information:

- **Reporting Requirements:** Describes what is required to be reported.
- **Notes:** Provides additional information about the data element that helps ensure that the data being reported is appropriate and acceptable.
- **Population Rules:** Provides additional info on how the data should be entered or formatted.

- **Not Applicable:** Indicates that the element is "Not Required" or "Not Allowed" to be reported to the DCO(s). An element that is "Not Allowed" will be edited for compliance by some DCOs.
- **Optional:** Indicates that the element is not required to be reported to the DCO(s), but may be edited, captured or ignored by the DCO(s) if reported.

The last tab, **Codes**, displays the list of valid codes for each data element. For elements that do not have codes associated, this tab is disabled. Each code is shown with its corresponding description, code notes and DCO applicability.
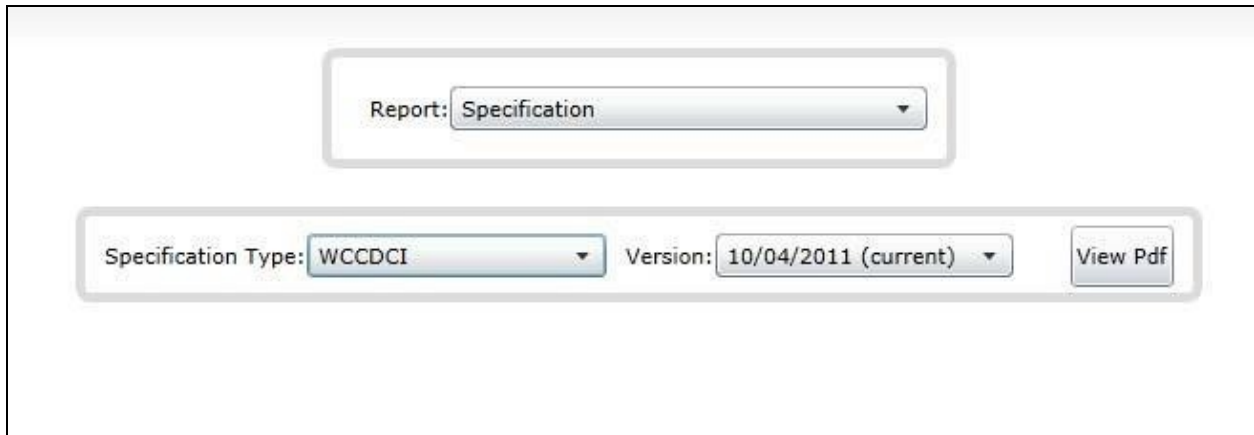

V. Reports

The **Reports** section of SearchPoint allows the user to download the Adobe PDF versions of all the WCIO Data Specifications. These are similar to the documents that have previously been available on the WCIO Website.

There are four Report types available. All of these reports also have a **Specification Type** and **Version** associated, except for the Data Dictionary, which is comprised of all of the data specifications. The **Specification Type** is the name of the WCIO Data Specification, such as WCPOLS or WCSTAT. The **Version** is the effective date of the manual. By selecting this drop-down the user can view previous versions of the specifications, similar to the Archive on the WCIO

Website. Note that the Version will always default to the most current and will show the date as *mm/dd/yyyy (current)*.
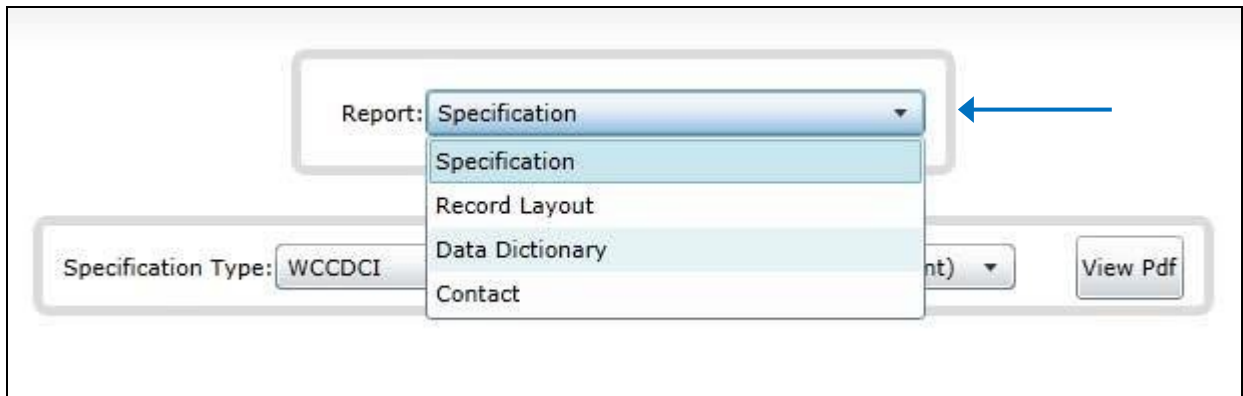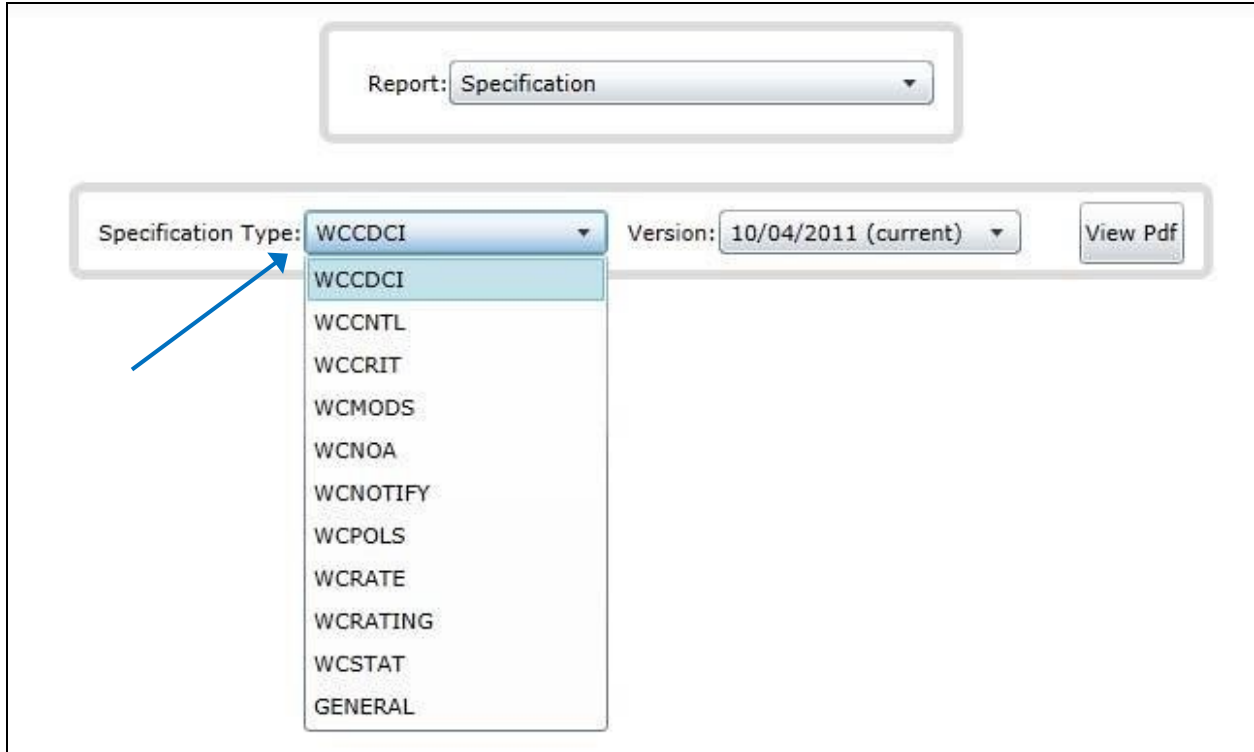

The four **Reports** that are available are:

▪ **Specification** – This report returns the full WCIO Data Specification Manual for the chosen Specification Type. The user must also select a Specification Type and a Version to view this report.

▪ **Record Layout** – This report returns the WCIO Data Specification in a condensed layout. This report is created by selecting a Specification Type and the Version. This view of the manual shows the user only the Field Name, Position, Class and Bytes with all of the extra reporting instructions removed.

▪ **Data Dictionary** – This report returns the WCIO Data Dictionary. The dictionary contains all elements found in the WCIO Data Specification Manual, along with their definitions and formats. The user only needs to select a Version in order to view the report as it contains all of the manuals within this report.

▪ **Contact** – This report returns the DCO contacts for each Specification Type. Phone numbers, email addresses and mailing addresses are shown for all applicable DCOs.

To view a report, the user will first select the type of report from the **Report** drop-down.
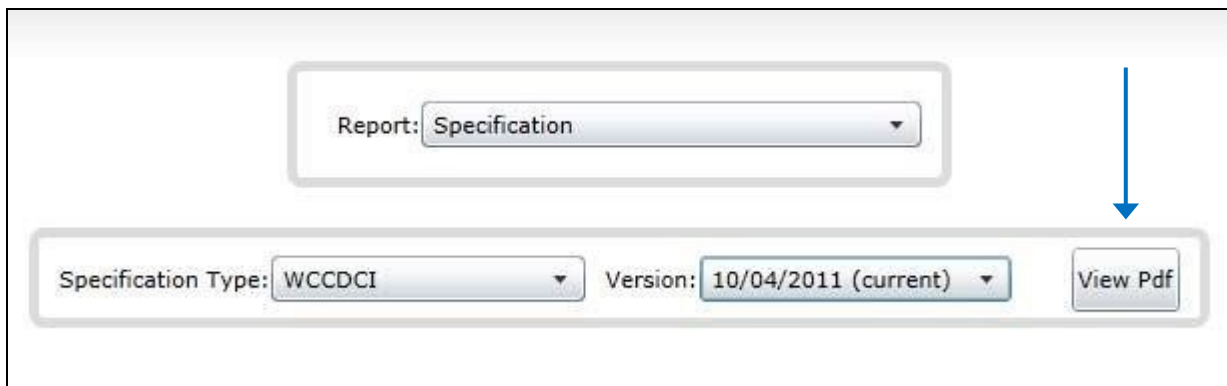
The user will then select a **Specification Type**. The Specification Type drop-down will not be shown if Data Dictionary is selected as the Report.

Finally, the user must select a **Version**. The default will always be the most current version and will be labeled *mm/dd/yyyy (current)*. Once all selections are made, click on **View PDF**.

The report will be generated in a new window as an Adobe PDF file.

There are bookmarks within the PDF to help the user navigate each document. Displaying the bookmarks depends on the version of Adobe installed. In the current version of Adobe Reader, right-click with the mouse and select **Show Navigation Pane Buttons**. This will activate a toolbar on the left side of the screen, where the bookmarks are found.

In addition, a **Summary of Changes** is included with a list of all changes made to the document since the prior version. The Summary of Changes is generated only for the Specification report, and is therefore not included within the Data Dictionary, Record Layout or Contact report.