Small Insurer Reporting Procedure Manual

This guide is intended for insurance companies with 1,000 policies or less to report. However, this model can be extended to handle more policies depending on individual circumstances.

The text file, *Appendix 3 Fixed Record Template.txt* is to aid the insurer in creating fixed length records. This file corresponds to the format outlined in Appendix 3 within the *State of Wyoming Financial Responsibility Verification Program (FRVP) Web Services Program Guide for Insurers.* Fixed length records can be compared against the record templates in the appropriate text file to validate that all fields have been correctly ordered and padded with spaces.

The Excel file, *Submission Templates (Wyoming).xls*, is for use in creating delimited records. The file contains a worksheet that has a header row specifying the fields in the required order. Once the records have been entered into the worksheet, they will need to be exported to a pipe delimited (|) file. The following instructions describe the steps to complete this task to create a file compliant to the format specified in Appendix 3.

Step 1

From the *File* menu, select *Save As* and choose *CSV* (*Comma delimited*)(*.*csv*) from the *Save as type:* drop down menu. Create a file name that adheres to the file naming convention outlined in the Wyoming Web Services Program Guide for Insurers Version 2 on page 25. In the example, the company control code is 60000, the submission date is March 12, 2007, and the file contains 10 records.

🛛 Microsoft Excel - Submission Templates (Texas).xls							
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1 Company Control Code	User Defined Field	Policy Number	Policy Type	Policy Effective Date	Policy Expiration Date	Vehicle/Non-owner Effective D	
2 60000	UserDefinedField	12345	P	20060601	20080601	20060801	
3 60000	UserDefinedField	12345	P	20060601	20080601	20060801	
4 60000	UserDefinedField	12345	P	20060601	20080601	20060801	
5 60000	UserDefinedField	12345	P	20060601	20080601	20060801	
6 60000	UserDefinedField	88462	P	20070101	20070630	20070101	
7 60000	UserDefinedField	100400	n	20070404	00070000	20070101	
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	My P	laces Save as typ	e: CSV (Comma d	delimited) (*.csv)	Cano	el	
			Unicode Text	(*.txt)	~		
			Microsoft Exce	l 5.0/95 Workbook (*.xls)			
			Microsoft Exce	1 97- Excel 2003 & 5.0/95 Work	book (*.xls)		
			Microsoft Exce	4.0 Worksheet (*,xls)			
			Microsoft Exce	3.0 Worksheet (*, xls)	~		

After selecting *Save*, a dialog will appear with a warning regarding workbooks with multiple sheets. Click *OK* and a file will be created containing only data from the active worksheet.

Microsof	ft Excel
1	The selected file type does not support workbooks that contain multiple sheets. • To save only the active sheet, click OK. • To save all sheets, save them individually using a different file name for each, or choose a file type that supports multiple sheets. OK Cancel

One final informational dialog will appear regarding feature compatibility. Click *Yes* to complete saving the file.

crosoft Excel
 60000_20070312_1of1_10_E.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? To keep this format, which leaves out any incompatible features, click Yes. To preserve the features, click No. Then save a copy in the latest Excel format. To see what might be lost, click Help.
Yes No Help

Step 2

Now that the file has been saved in the CSV (comma separated values) format, open the file using Notepad.exe. From the *Edit* menu, select *Replace...*

	mat view n	
11 Undo	Ctrl+Z) User Defined Field, Policy Number, Policy Type, Policy Effective Date, Policy Expiration Date, Vehicle/1
Cut	Ctrl+X	1d2,12345,P,20060601,20080601,20060801,Anystreet,Anytown,TX,11111,2123456789,Jeep,Cherokee,2004,76
Сору	Ctrl+C	1d2,12345,P,20060601,20080601,20060801,Anystreet,Anytown,Tx,11111,84975614329987434,Dodge,Ram,2006,
Paste	Ctrl+V	1d3.88462, P.20070101, 20070630, 20070101, 123 Main, Anycity, TX, 12222, V4759411247967434, Honda, Accord, 2007
Delete	Del	1d4,88462,p,20070101,20070630,20070101,123_Main,Anýcitý,TX,22222,Y4759411247963418,Honda,Accord,200
Find	Ctrl+F	-11d5,46821,P,20070401,20070630,20070401,PO BOX /43,Springville,TX,33329,P23/884196444/853,T0yOta,Cami "Id6.46821,P.20070401,20070600,20070401,PO BOX /43,Springville,TX,33329,P237884196444/853,T0yOta,Cami
Find N	ext F3	1d7,46821,P,20070401,20070630,20070401,PO Box 743,Springville,TX,33329,P2378541964447853,Toyota,Cam
Replac	e Ctrl+H	d8,57930,P,20061115,20070515,20061115,789 Arbor Ln,Laketown,TX,44444,R7N47951436785521,Ford,Focus,
Go To.	Ctrl+G	-
Select	All Ctrl+A	
Time/E	ate F5	

When the *Replace* dialog pops up, enter a comma (,) in the *Find what:* textbox and a pipe (|) in the *Replace with:* textbox and click *Replace All.*

Replace	? 🛛
Find what:	<u>Find Next</u>
Re <u>p</u> lace with:	<u>R</u> eplace
	Replace <u>A</u> ll
Match case	Cancel

You will now notice that all fields are delimited with the pipe (|) character as required. The final step is to remove the first record that was created from the header record in the template file indicated by the highlighted record in the figure below. Please save this file without the csv extension and create the pgp extension by encrypting the file.