Welcome to the 2021 Mortality Data Collection Training Webinar:
Company Administrators
May 27, 2021

✓ All attendees will be muted throughout the presentation.
✓ Please use the “Q&A” for questions and send to all panelists. Questions will be addressed at the end of the presentation.
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2021 Mortality Data Collection Training Webinar: Company Administrators

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May 27, 2021
Agenda – Company Administrator Training

• Overview of Responsibilities

• RDC Processes

• FTP processes
Company Administrator Responsibilities

The Company Administrator will be responsible for assigning and removing company users in the Regulatory Data Collection (RDC) system.

The Company Administrator will also be the user assigned to the company’s secure FTP site that will be used to transmit confidential information between the company and the NAIC.

A current NAIC login (LDAP account) can be used to access both applications. NAIC staff has requested the appropriate permissions for those individuals who already had a login. For those who did not previously have a login, we have requested one for you. If you have not already received your login information, you should be receiving an email shortly.
Agenda – Company Administrator Training

- Overview of Responsibilities
- RDC Processes
- FTP processes
NAIC staff will set up the Company Administrators in the RDC system.

The Company Administrator will be able to assign additional users as necessary. It will also be the Company Administrator’s responsibility to remove users who no longer should have access to the company’s data submissions.
Accessing RDC (https://content.naic.org/industry)
Logging In to RDC

Clicking the link will open the login screen. Here you will enter your NAIC Username and Password.
After logging in, you will be taken to this screen where you will select a datacall.
Legal Disclaimer

This will appear each time a user logs into a PBR datacall.
RDC Datacall Welcome Screen

From this screen, select User Assignments in the menu.
RDC Assigning Additional Users

Enter your NAIC Company Code and click Search
RDC Assigning Additional Users

You should get a screen that shows you as the Primary user.
Only NAIC staff can assign or remove a Primary user.
RDC Assigning Additional Users

To add a Secondary user, enter their NAIC username and click Add.
RDC Assigning Additional Users

The new users will show up in the list as Secondary users. To remove a user, click the red X.
RDC Data Submission

The Company Administrators and Secondary Users are defined at the company level. If you are administrator for multiple companies, you will need to assign users separately for each company.

Company Administrators and Secondary Users are authorized to submit data files and to review the RDC exceptions.

Please see the RDC submission instructions or the RDC Submission training video on our website for more information on submitting a data file.

https://content.naic.org/pbr_data.htm
(Scroll to the VM-50/VM-51 Experience Reporting section)
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FTP process

You will receive an email with a link to the folder for each company. This link will take you to the FTP login screen. Use your NAIC Username and Password to log in.
After logging in, you will see this dashboard.
FTP process

You will need to click on the “Go To Folder” drop down and select the folder. If you are responsible for multiple companies, you should see a folder for each company.
FTP process

Once you are in a specific company folder, you can add sub-folders, upload documents, or download documents.
FTP process

If you choose to upload a file, you will get a separate window where you can identify the files and add additional notes about the files.
FTP process

When there are files in your folder, you will have additional options to download, copy, move and delete.
FTP Retention

Any time the NAIC uploads files to one of your folders, you will receive an email notification.

We are setting up the folders so that nothing gets deleted automatically (time limit, etc.).

Once this data call has ended, NAIC staff will delete all documents in preparation for the next data call. An email will be sent prior to this maintenance to give you a chance to download anything remaining on the site.
Questions?