

Company Administrator User's Guide

Responsibilities:

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

A current NAIC login (LDAP account) is used to access RDC.

RDC Processing:

- 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.

- Go to the NAIC website and click on the industry page (<https://content.naic.org/industry>). Scroll to the Regulatory Reporting sections and click on Mortality Experience Data Collection.

NAIC



Regulator **Industry** Consumer Comm

Regulatory Reporting

- Financial Statement Filing
- Securities Valuation Office
- Structured Securities Group
- Principle-Based Reserving
- Market Conduct Annual Statement
- Mortality Experience Data Collection**
- Subsidiary Controlled Affiliation

Mortality Experience Data Collection ← Click this link

- Next you will see the login screen. Here you will enter your NAIC Username and Password.



Username

Password

Login

Forgot Password? [Click Here](#)

Need assistance with logging in?
[✉ Email Support](#) | [☎ Call Support: \(816\) 783-8500](#)

By logging in, you agree to the NAIC's [Terms and Conditions](#)

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- After logging in, you will be taken to this screen where you will select a data call.

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RDC

Datacall Selection

Select datacall group:

Select datacall:

- Select--
- PBR_2018**
- PBR_2019

- After selecting a data call, you will be taken to the Legal Disclaimer page (otherwise known as the click-through agreement). This screen will appear each time any user logs into RDC. Click the Agree button at the bottom to continue.

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RDC RDC Home

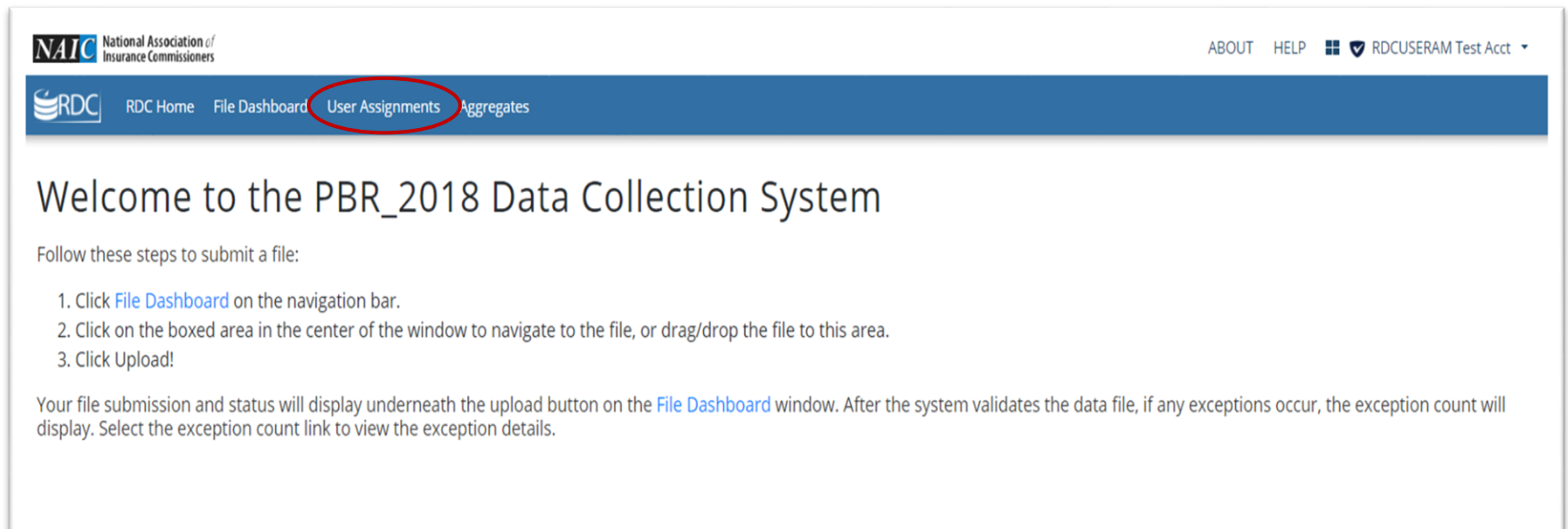
ABOUT HELP RDCUSERAM Test Acct

Legal Disclaimer


1. The NAIC has been designated in the Valuation Manual (VM-50) as the Experience Reporting Agent for the Statistical Plan for Mortality data (Experience Data) beginning Jan. 1, 2020.
2. Submission of Experience Data through this application and the activities of the NAIC as the Experience Reporting Agent are governed by the requirements of the standard valuation law as enacted in each state (each, a Standard Valuation Law) and the Valuation Manual.
3. By clicking "Submit" you are agreeing that you are authorized by the company to submit Experience Data. Access to the application will be limited to your affiliates and you and your affiliates' directors, officers, employees, independent sales professionals, agents, auditors, consultants, suppliers, service providers or contractors who have a "need to know" within their scope of responsibility.
4. You acknowledge that coding a policy, loss, transaction or other body of data as anything other than what it is known as is prohibited.
5. You acknowledge that you will correct identified errors in a timely fashion and follow other requirements in the Valuation Manual concerning reporting and correction of errors.
6. The application is propriety, and you agree to not reverse engineer, reverse assemble or reverse compile the filing application or provide any part of the application to a third party.
7. The NAIC will collect Experience Data based on statistical plans as defined in the Valuation Manual. The Life Actuarial (A) Task Force will be responsible for the content and maintenance of the experience reporting requirements.
8. The NAIC will design its data collection based on the regulatory requirements set out in VM 51. The NAIC will provide sufficient notice to reporting companies of instructions, changes, and procedures to enable the companies to adequately prepare for data submission. Annual updates are anticipated.
9. The NAIC will set error tolerances and monitor them annually.
10. Once the Experience Data is submitted, the NAIC will conduct validity checks as described in the Valuation Manual and identify errors as required. The NAIC will also conduct reasonability checks as described by the Valuation Manual and identify errors as required.
11. Experience Data submitted by companies is considered the property of the companies submitting the data, but the recognition of such ownership will not affect the ability of states or the NAIC to use such information as authorized by the applicable Standard Valuation Law or the Valuation manual.
12. As set out in the applicable Standard Valuation Law, Experience Data is considered Confidential Information.
13. Confidential Information may be shared only with those individuals or entities specified in state law. Any agreement between a state insurance department and the NAIC will address the extent to which the NAIC is authorized to share information consistent with state law.
14. If the NAIC receives a third-party request for Confidential Information not covered by a state agreement, the submitting company will be promptly notified in writing and provided an opportunity to intervene. The NAIC shall provide such cooperation as the submitting company reasonably requests in resisting the release of Confidential Information.
15. Aggregate reports of experience data that do not permit identification of individual company experience or personally identifiable information are not considered Confidential Information.
16. The NAIC agrees to maintain commercially reasonable security protocols consistent with industry standards and applicable state laws to protect the Confidential Information submitted and will provide a copy of security protocol documentation upon request.
17. The NAIC will undergo at least annual external audits as required in the Valuation Manual and provide a copy of any report prepared in connection with such and audit upon request.
18. The NAIC will follow the requirements of the Valuation Manual in the event of an identified security breach.
19. The NAIC does not guarantee uninterrupted access to the filing application.
20. The NAIC will comply with all laws, rules and regulations applicable to its activities as the Experience Reporting Agent.


Agree

- Next you will be taken to the RDC Welcome screen. If you are submitting a file, you can click on File Dashboard in the menu. To add additional users, click on User Assignments.



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 RDC Home File Dashboard **User Assignments** Aggregates

Welcome to the PBR_2018 Data Collection System

Follow these steps to submit a file:

1. Click [File Dashboard](#) on the navigation bar.
2. Click on the boxed area in the center of the window to navigate to the file, or drag/drop the file to this area.
3. Click Upload!

Your file submission and status will display underneath the upload button on the [File Dashboard](#) window. After the system validates the data file, if any exceptions occur, the exception count will display. Select the exception count link to view the exception details.

- Enter your NAIC Company Code and click Search.

The screenshot shows the RDC (Risk Data Center) interface. At the top left is the NAIC logo (National Association of Insurance Commissioners). Below it is a blue navigation bar with the RDC logo and menu items: RDC Home, File Dashboard, User Assignments (highlighted), and Aggregates. The main heading is "PBR_2018 User Assignments". Below the heading, there is a section for "NAIC Company Code" with a text input field containing "NAIC Company Code" and a blue "Search" button with a magnifying glass icon. Below that is an "Add:" section with a text input field containing "User ID" and a blue "+ Add" button.

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

The screenshot displays the 'PBR_2018 User Assignments' interface. At the top, there is a navigation bar with the NAIC logo and 'National Association of Insurance Commissioners' text on the left, and 'ABOUT', 'HELP', and 'RC' on the right. Below this is a secondary navigation bar with 'RDC Home', 'File Dashboard', 'User Assignments' (highlighted), and 'Aggregates'. The main heading is 'PBR_2018 User Assignments'. Below the heading, there is a search section for 'NAIC Company Code' with a text input containing '99999' and a 'Search' button. Below that is an 'Add:' section with a 'User ID' text input and an '+ Add' button. At the bottom, there is a table with the following data:

NAIC Company Code	User ID	Primary	Secondary	Delete
99999	rdcuseram	<input checked="" type="radio"/>	<input type="radio"/>	<input type="button" value="X"/>

- To add a Secondary user, enter their NAIC username and click Add.

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ABOUT HELP

RDC RDC Home File Dashboard User Assignments Aggregates

PBR_2018 User Assignments

NAIC Company Code




99999 Search


Add:

xxxxx + Add

NAIC Company Code	User ID	Primary	Secondary	Delete
99999	rdcuseram	<input checked="" type="radio"/>	<input type="radio"/>	<input type="button" value="X"/>

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


ABOUT HELP   RDC


[RDC Home](#)
[File Dashboard](#)
[User Assignments](#)
[Aggregates](#)

PBR_2018 User Assignments

xxxxx has been added

NAIC Company Code

Add:

NAIC Company Code	User ID	Primary	Secondary	Delete
99999	rdcuseram	<input checked="" type="radio"/>		<input type="button" value="X"/>
99999	xxxxx		<input checked="" type="radio"/>	<input type="button" value="X"/>

- 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)