

CDX® FREQUENTLY ASKED QUESTIONS

1. How do I become authorized to use CDX®, PEEP®, and BEEP®?

Complete the Compensation Data Exchange (CDX®), Insurer User Management Group (UMG) Primary Administrator Application found on the ACCCT website. The Application must be signed by an officer of the Insurance Group and sent to CDX® Central Support to begin the setup process. Instructions for sending the Application to CDX® Central Support are in the “Terms and Conditions” on the accct.org website.

2. After I complete the application, what is the next step?

When CDX® Central Support receives your application, they will perform general setup in CDX®. When they have completed the general setup, the Insurer Primary Administrator (IPA) will receive an e-mail generated by CDX® that will contain a temporary password and a link to access the website. The Insurance Primary Administrator will then need to log on and submit a Carrier Request to add carriers to their UMG. Please contact the individual DCO before submitting a file. DCO contacts can be found on the main login screen by selecting the CDX® HELP CONTACT LIST.

3. What information is available regarding the use of the CDX application?

An instructional video is available on the accct.org home page, under the Online Training link. This video is for people who use or support the use of the CDX application and describes the functions, procedures, and standards related to CDX. Select the CDX User Guide link within the online training for additional information.

4. Do you require a transmittal letter for each submission made through CDX®, or is the ETR sufficient?

CDX® relies on the Electronic Transmittal Record (ETR) to track the files. You will receive confirmation e-mails from CDX® as your files are processed, and if security is granted by your IPA, you have the ETR Search function in CDX® to locate your files and research the status of the file. This is a permanent record of your files. The history will not be purged. Neither CDX® nor the DCOs accept hardcopy transmittal letters.

5. Is the Primary Administrator required to reset passwords for Users or can they reset their own passwords?

Users can reset their own password as long the correct answer for their security question is provided.

6. What is the difference between a User and a Secondary Administrator User?

An Insurer User performs the actual function of the application and does not have administrator permissions. An Insurer User becomes a Secondary Administrator when the Primary Administrator grants any manage permission to an Insurer User.

7. How do you change the Primary Administrator's contact information?

To change the contact information for current Primary Administrators, a new **Insurer UMG Primary Administrator Application**, available on the accct.org home page, will need to be completed and submitted.

8. What is the procedure to change the Insurer Primary Administrator (IPA) on the account?

A new Insurer User Management Group Primary Administrator Application will need to be submitted for a replacement or any contact information change for current Group Administrators.

9. I am a Primary Administrator. How do I add more Users?

To add more Users, use the following procedure:

- Log into the CDX® website
- Select Profile
- Select My UMG
- Select User Tab
- Select Add User
- Fill out the required fields (*) and select Create
- Select the User's breadcrumb link
- Select the User just created
- Select the Edit User drop down arrow
- Select Permissions
- Grant User additional permissions (if User Management Group permissions are needed)
- Select Save
- Select the Permissions drop down arrow
- Select Application Access
- Grant User access to Applications for each carrier needed
- Select Save
- Select the Application Access drop down arrow Select Transfer Permission
- Select the plus symbol next to the carrier
- Grant User transfer permission for each carrier needed
- Select Save

10. Is the Carrier ID a searchable field on the ETR screen?

The ETR screen has several searchable fields, including the Carrier ID.

11. Will CDX accept a zip file that has multiple individual files for various DCOs?

Yes.

12. Are there any specifications we should follow?

CDX® itself only requires an Electronic Transmittal Record (ETR). CDX® opens the file, reads the ETR, and knows from that where the file is to go. Several of the DCOs are adopting (and may require) a specific file naming convention. Contact the DCO(s) you are working with for instructions. The naming convention can be found in Appendix A in the CDX® User Guide.

13. What secure transmissions do you accept?

There are three ways to send files to CDX®:

- Web upload, which is selected from the Functions within CDX® and is protected with Secure Socket Layers (SSL)
- File Transfer Protocol (FTP), which may be zipped or protected with the security related extensions SFTP or FTP/SSL

14. Is there is a limit on the number of Users that can be set up after establishing an account?

There is no limit to the number of Users.

15. We are now able to get into the site with a global ID; however, it appears data is missing.

The User may not have the appropriate permissions to view all carriers within the User Management Group. Please review the User Application Access permissions.

16. Is your TCP port standard or non-standard?

It is standard port 21.

17. We would like to have the experience modification files delivered via FTP instead of e-mail. From what IP addresses would the experience modifications be delivered?

Use the same as the address that is used for FTP: ftps.acctt.org.

18. How do I view/change the e-mail address that is used for carrier notification of accepted/rejected files?

- Logon to CDX®
- Select My UMG
- Select the Carriers tab
- Select a carrier
- Select the ETR Response Setup tab
- Change the e-mail address (if needed)
- Select Save

19. There is a notation to contact the DCOs to determine timing and frequency of submissions. Would this be different from the timing and frequency we currently use?

There should not be any differences in timing, but some DCOs may not support more than one submission per day. When in doubt, contact the appropriate DCO for assistance.

Exception: NJ allows only weekly submissions. If the carrier is new to reporting data electronically, or if they intend to change their current procedures, they should contact the DCO for the specifics.

20. Is there any verification that the DCOs have received the submissions?

Yes, CDX® contains a function called ETR Search, which is a permanent record of all the files you have sent through CDX® including submissions sent from BEEP® and PEEP®. Also, an e-mail confirmation is sent when the DCO has processed your submission.