

Business Entity (BE) Licensee Supplementary Quick Tips

BE supplementary online licensing services home page services

View Pending Online Request

1. If your online renewal application is pending, choose the “View Pending Online Request” button on the left side of the home page to display and check the status of your pending application(s). Select the “View” link to the left of a transaction to view the detail screen of the pended request.
2. Select the “Application Summary” link on the left in the “Entity Details” section to open a view of the pending submission.
3. A check list will appear to show all required documents with the respective status.
4. Click on the “View” link to view any previously submitted document.
5. Click on the “Attach” link to attach any additional outstanding documents.
 - a. To upload a document, select the “browse” button. Locate and select the document.
 - b. Click on “open” in your browser. This will place the document in the document field. A textbox exists to add additional comments, if needed, about the attached document.
 - c. Select the “Add to List” link to place the document in the “Attachment List” section.
 - d. After you add all your documents, select the “Upload” button at the bottom of the page.
6. The OIC will review your pended renewal application. If all required documents are attached and acceptable, the OIC will send you an approval e-mail. If further information is needed, the OIC will notify you via e-mail.

Change Name

1. Select the “Change Name” button located on the left side of the home page.
2. The current Business Entity Information will display. Complete the “Name Change” information
3. Select the “Submit” button at the bottom of the page. This will take you to the fee payment page.
4. There are two options for the payment of your fees:

Option 1 - You may pay using an electronic check (e-check), which is the OIC’s preferred method of payment and is the default option (meaning all users will be directed to the e-check payment screen). On the e-check payment screen, you will find the fee details listed for your licensing transaction. Complete all required fields and click on the “Submit” button at the bottom of the page.

Option 2 - You may also pay with either a Visa or MasterCard. If choosing to pay with a credit card, click on the “Alternate Payment Method” link on the lower left-hand portion of the screen. This will take you to the Credit Card Payment page. Complete all fields and click on the “Submit” button at the bottom of the page.

Clicking on the “Submit” button will take you to either the “e-check Verification” page or the “Credit Card Verification” page, depending upon the option you have chosen. **Please note: the Verification page is for you to verify your information. Your payment will not be debited or charged until you select the “Process” button.**

5. When processing is complete, the system will take you to the confirmation page giving you your online transaction number, a link to print the receipt for your online payment, and the list of any outstanding items. A payment confirmation will be sent the payee’s email address.
6. You may electronically upload supplemental documents to support the name change such as an approved amendment to the Articles of Incorporation or Articles of Formation.
 - a. To upload a document, select the “browse” button. Locate and select the document.
 - b. Click on “open” in your browser. This places the document in the document field. A textbox exists to add additional comments, if needed, about the attached document.
 - c. Select the “Add to List” link to place the document in the “Attachment List” section.
 - d. After you add all the documents, select the “Upload” button at the bottom of the page. This completes the document(s) upload.

If unable to upload, you can mail the documents including your transaction number to the OIC via the postal service.

7. When the outstanding document(s) are received, the OIC will review the pended name change application. . If more information is needed, the OIC will notify you via e-mail. When all outstanding documents are acceptable, the OIC will send you an approval e-mail with a link to print your license(s).

Change Address

1. Choose the “Change Address” button located on the left side of the home page.
2. Enter your new address information regarding business or mailing addresses.
3. For the business address you can not change the state/country.
4. If the city is within Washington State, it must be a valid city.
5. Select the “Submit” button at the bottom of the page. This opens a confirmation page that gives you the option to print a duplicate license.

Change DBA

1. Select the “Change DBA” button located on the left side of the home page.
2. The current Business Entity Information will display. Complete the DBA information. You may add a new or delete a current DBA.
3. Select the “Submit” button at the bottom of the page. This will take you to the fee payment page.
4. There are two options for the payment of your fees:

Option 1 - You may pay using an electronic check (e-check), which is the OIC's preferred method of payment and is the default option (meaning all users will be directed to the e-check payment screen). On the e-check payment screen, you will find the fee details listed for your licensing transaction. Complete all required fields and click on the "Submit" button at the bottom of the page.

Option 2 - You may also pay with either a Visa or MasterCard. If choosing to pay with a credit card, click on the "Alternate Payment Method" link on the lower left-hand portion of the screen. This will take you to the Credit Card Payment page. Complete all fields and click on the "Submit" button at the bottom of the page.

Clicking on the "Submit" button will take you to either the "e-check Verification" page or the "Credit Card Verification" page, depending upon the option you have chosen. **Please note: the Verification page is for you to verify your information. Your payment will not be debited or charged until you select the "Process" button.**

5. Review the payment information listed. If any information is NOT CORRECT, select the "Back" button to return to the previous page to make any necessary corrections. If choosing the e-check option, you will need to click on the debit authorization box on the verification screen (you will find this in the lower left-hand corner of the screen). If the information is correct, select the "Process" button at the bottom of the page. A message will appear asking you NOT to refresh, go back, or cancel this page while your payment is processing.
6. When processing is complete, the system will take you to the confirmation page giving you your online transaction number, a link to print the receipt for your online payment, a link to print your new license with the newly added DBA, and the list of any outstanding items. A payment confirmation will be sent the payee's email address.

Print Affiliation(s)

1. Select the "Print affiliation(s)" link from the menu on the left side of the home page.
2. The BE information and Affiliates(s) Information sections will display
3. Select "Selected Affiliate" and enter the licensee's WAOIC# to generate the affiliation certificate. You may also choose the "All Affiliate" to generate all active affiliation certificates.
4. Select the "Generate Affiliation Certificate" button at the bottom of the screen. This creates a PDF document of the requested certificates to open and print or save.

Print License(s)

1. Choose the "Print License(s)" button located on the left side of the home page. This will display your BE Information and your License Information. If you want to print your license(s), select the check box to the right of the license. To print all licenses, select the "Select all" box in the blue bar.
2. To print or save your license(s), select the "Generate License Certificate" button at the bottom of the page. This opens a PDF of your license(s).

Print Appointments(s)

1. Select the "Print appointment(s)" link from the menu on the left side of the home page.
2. The insurer information and appointee(s) sections will display

3. Select “Selected Appointee” and enter the licensee’s WAOIC# to generate the appointment certificate. You may also choose the “All Appointee” to generate all active appointment certificates.
4. Select the “Generate Appointment Certificate” button at the bottom of the screen. This creates a PDF document of the requested certificates to open and print or save.

Print Unpaid Invoice(s)

1. Select the “Print Unpaid Invoice(s)” link located on the left side of the home page.
2. The BE Information will display.
3. Select the “Application Summary” link to view or print.
4. Select the “View Invoice” link to view or print your unpaid invoice. A copy of this invoice must be included with your payment.

Add Affiliation(s)

1. Select the “Add Affiliation(s)” link located on the left side of the home page. The business entity information and license type will display.
2. Select the “Add” link in the “Affiliation List” banner to add a row.
3. Enter licensee’s WAOIC# or use the “Licensee Lookup” link in the banner if you do not know the WAOIC#.
4. The Individual’s name and License Type drop down will display.
 - a. If the individual has only one license type, the system will automatically select the license type for that affiliate.
 - b. If the individual has more than one license type (such as adjuster or surplus lines), the user should select the correct license type for the affiliate.
 - c. If one of the license types is Producer, the lines of authority of the individual will also display.
5. The business entity and the individual must have the same license type in order to be affiliated. **In addition, the producer must have at least one common line of authority in order to be affiliated.**
6. You can add additional affiliations following steps 2-5. The user may delete a row with an incorrect affiliation by clicking on the box at the end of the row and selecting the “Delete” link. Click on the “Submit” button when all new affiliations have been added. This will take you to the fee payment page.
7. There are two options for the payment of your fees:

Option 1 - You may pay using an electronic check (e-check), which is the OIC’s preferred method of payment and is the default option (meaning all users will be directed to the e-check payment screen). On the e-check payment screen, you will find the fee details listed for your licensing transaction. Complete all required fields and click on the “Submit” button at the bottom of the page.

Option 2 - You may also pay with either a Visa or MasterCard. If choosing to pay with a credit card, click on the “Alternate Payment Method” link on the lower left-hand portion of the screen. This will take you to the Credit Card Payment page. Complete all fields and click on the “Submit” button at the bottom of the page.

Clicking on the “Submit” button will take you to either the “e-check Verification” page or the “Credit Card Verification” page, depending upon the option you have chosen. **Please note: the Verification page is for you to verify your information. Your payment will not be debited or charged until you select the “Process” button.**

8. Review the payment information listed. If any information is NOT CORRECT, select the “Back” button to return to the previous page to make any necessary corrections. If choosing the e-check option, you will need to click on the debit authorization box on the verification screen (you will find this in the lower left-hand corner of the screen). If the information is correct, select the “Process” button at the bottom of the page. A message will appear asking you NOT to refresh, go back, or cancel this page while your payment is processing.
9. When processing is complete, the system will take you to the confirmation page giving you your online transaction number, a link to print the receipt for your online payment, and the link to view/print your newly added affiliation(s). A payment confirmation will be sent the payee’s email address.

Terminate Affiliation(s)

1. Select the “Terminate Affiliation(s)” link located on the left side of the home page.
2. In the “Affiliate(s) Information” section, if you wish to terminate a single licensee, enter licensee’s WAOIC# or use the “Licensee Lookup” link in the banner if you do not know the WAOIC#. If you want to terminate the affiliation for multiple affiliates, select “All affiliates”
3. Click on the “Find” button.
4. The selected affiliation(s) will be listed in the “Affiliation List” section.
5. Choose the affiliations you want to terminate by checking the checkbox in last column of the “Affiliation List” section.
6. Click on the “Submit” button at the bottom of the page
7. This will take you to the “Affiliation Termination Confirmation” Page.
8. There is no fee required for the termination of an affiliation.

Change Branch

1. Select the “Change Branch” button located on the left side of the home page.
2. The current Business Entity Information and License Information will display. You may add a new or delete a current DBA. You may also link the branch to a DBA name, if applicable, by clicking on the “Link DBA” link and selecting the DBA from the pop-up DBA List.
3. Select the “Submit” button at the bottom of the page. This will take you to the fee payment page.
4. There are two options for the payment of your fees:

Option 1 - You may pay using an electronic check (e-check), which is the OIC’s preferred method of payment and is the default option (meaning all users will be directed to the e-check

payment screen). On the e-check payment screen, you will find the fee details listed for your licensing transaction. Complete all required fields and click on the “Submit” button at the bottom of the page.

Option 2 - You may also pay with either a Visa or MasterCard. If choosing to pay with a credit card, click on the “Alternate Payment Method” link on the lower left-hand portion of the screen. This will take you to the Credit Card Payment page. Complete all fields and click on the “Submit” button at the bottom of the page.

Clicking on the “Submit” button will take you to either the “e-check Verification” page or the “Credit Card Verification” page, depending upon the option you have chosen. **Please note: the Verification page is for you to verify your information. Your payment will not be debited or charged until you select the “Process” button.**

5. Review the payment information listed. If any information is NOT CORRECT, select the “Back” button to return to the previous page to make any necessary corrections. If choosing the e-check option, you will need to click on the debit authorization box on the verification screen (you will find this in the lower left-hand corner of the screen). If the information is correct, select the “Process” button at the bottom of the page. A message will appear asking you NOT to refresh, go back, or cancel this page while your payment is processing.
6. When processing is complete, the system will take you to the confirmation page giving you your online transaction number, a link to print the receipt for your online payment, and the link to print the license for newly added branches.

Change password

1. Choose the “Change Password” button located on the left side of the home page.
2. Type the current password.
3. Type the new password. You must use between eight and 16 characters and it must contain at least two numbers and one letter.
4. Confirm your new password by typing it again.
5. Click on the “Submit” button, which takes you to the Change Password Confirmation page.
6. You have now completed changing your password.
7. Click on the “Home” button to return to the Online Licensing home page.

Update CRD Number

1. Select the “Update CRD Number” on the home page. Verify the Business Entity information.
2. Fill in the CRD Number field with the Business Entity’s securities license number.
3. Complete the question regarding adding the variable line to the Business Entity’s existing license and select the “Submit” button.
4. This takes you to the Confirmation page, informs you that your information has been submitted, and will also list the transaction number. If approved, a link will be provided to print your license certificate. If the transaction is pended for verification of the home state license, the OIC will review the request.

Current Profile

1. Select the “Current Profile” button in the left hand column on the home page. This will create a separate PDF file to open
2. By opening the PDF, you can view and print the details to your BE current license. This information includes the BE name, WAOIC number, current address, any DBA’s, all licenses, appointments, and affiliations you currently have.

For questions about this new service, please call 360-725-9633 and select the “Licensing” option or send an e-mail to onlinelicense@oic.wa.gov

