Instructions

Insurer Quick Tips

How to access the insurance commissioner's new online licensing service

(Insurer includes insurance company, health care service contractor, health maintenance organization, risk retention group and fraternal benefit society)

Insurer registration/login instructions

Insurer registration

To register go to www.insurance.wa.gov

1. Click on the Agent/Broker tab at the top of the page, select *Online Services* and select the "Insurer" link. This takes you to the *Online Licensing Services* registration/login page.
2. Go to the "New User?" **Register** hyperlink. This takes you to the *User Registration* page.
3. Type your User ID and temporary password as printed in your registration letter. All passwords are case sensitive.
4. Click on the "Next" button at the bottom of the page. This takes you to the *Licensing Contact Information* page.
5. Complete the licensing profile information. **Make sure that e-mail address is correct**. We will use this address information for all future licensing communication including your appointment renewal notification.
6. Click on the "Register" button at the bottom of the page. This will take you to the *Registration Confirmation* page. **You will receive a confirmation e-mail at the e-mail address you entered.**
7. Your have now completed the registration process
8. Click on the "Home" button to go to the *Online Licensing Services* home page or click on "Change Password" button to go to the *Change Password* page.

Insurer Login (after initial registration)

To login go to www.insurance.wa.gov

1. Click on the Agent/Broker tab at the top of the page
2. Select *Online Services* and select "Insurer" link. This takes you to the *Online Licensing Services* registration/login page.

3. The User Login section is located in the upper left corner of the page.
4. Enter your User ID and password and select the "Go" button. This takes you to the *Online Licensing Services* home page
5. If you forget your password, click on Forgot Password? Link. This takes you to the *Forgot Password* page.
6. Enter your insurer's WAOIC number, your e-mail address and select if you are an Administrator or Secondary user. You will receive an e-mail **at the registered email address** with your new login credentials.

Create a Secondary User (an additional person who is allowed to act on behalf of the insurer)

IMPORTANT NOTICE: The OIC has added a new e-check payment option for all insurer functions. Depending upon your company's policy on access to company bank account information, you may wish to add a Secondary User in your accounting department to input this secure data.

1. Choose the "Create Secondary User" button located on the left side of the home page.
2. As the administrator, you type the secondary user's e-mail address for the *Login Name* in the User ID box.
3. Module Code is "*Licensing.*" Status should appear as "*Active.*"
4. Type the secondary user's name
5. Determine what functionality to give to the secondary user
    a. Select functionally by checking each box after the function or if you wish to select all functions select the box in the blue banner.
6. Click on the "Save" button. This takes you to *Confirmation* page. The secondary user will receive an e-mail about their login credentials.
7. You have now completed creating a secondary user.
8. Click on "Home" button to return to the *Online Licensing Services* home page

Modify a Secondary User

1. Choose the "Modify Secondary User" button located on the left side of the home page.
2. As the administrator, you enter the secondary user's e-mail address for the login name in the User ID box.
3. The current secondary user information will display. Only the administrator can change or correct any information or change the status to active or inactive.
4. The administrator can reset the functionality of the secondary user by clicking on a blank box to add functionality or clicking on the checked box to remove functionality.
5. Click on the "Save" button at the bottom of the page. This takes you to *Confirmation* page for successful modifications of a secondary user. If you modify the login name, the secondary user will receive an e-mail about their new login credentials.
6. You have now completed modifying a secondary user.
7. Click on "Home" button to return to the *Online Licensing Services* home page

Change password

1. Choose the “Change Password” button located on the left side of the home page.
2. Type your current password
3. Type your new password. You must use between eight and 16 characters and must use 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 Services* home page.

Insurer Online Licensing Services home page services

Add a new appointment

1. Select the “Add Appointment(s)” link on the home page. The company information will display.
2. The user may:
   a. Add appointments **(Please note: a Title Agent appointment cannot be submitted online or through NIPR; it must be submitted via hardcopy)**
   b. Delete appointments
   c. View existing appointments
3. Select the “Add’ link in the “Appointment List” banner to add a row.
4. Enter licensee’s WAOIC# or use the “Licensee Lookup” link in the banner if you do not know the WAOIC#. **Tab out of the field or click somewhere on the page to display the licensee’s name and Producer license type with lines of authority.**
5. The appointment type will be defaulted to “Regular Appointment” but the user can select “MGA Appointment” from the dropdown list.
6. Appointments are possible if **at least one common line of authority exists between the insurer and the appointee.**
7. To delete an incorrect appointment, click in the box at the end of the row and then use the “Delete” link in the “Appointment List” banner.
8. You can add additional appointments following steps 3-6. When all new appointments have been added, click on the “Submit” button. This will take you to the payment section.

9. 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.**

10. 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.

11. 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 a link to view/print the appointment(s). A payment confirmation will be sent the payee's email address.

Terminate an appointment

IMPORTANT NOTICE: **If your company has a larger number of appointments to cancel during the Appointment Renewal Process or if the chosen method of payment is e-check, it may be easier to first use the Terminate Appointments process prior to attempting renewal.**

1. Select the "Terminate Appointment(s)" link on the home page.
2. In the "Appointment 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 appointments for multiple appointees, select "All appointees". Click on the "Find" button.
3. The selected appointment(s) will be listed in the "Appointment List" section.
4. Choose the appointments you want to terminate by checking the checkbox in last column of the appointment list section.
5. Click on the "Submit" button at the bottom of the page
6. This will take you to the "Terminate Appointment(s) Confirmation Page.
7. There is no fee required for the termination of an appointment.

View Pending Online Request

1. If your online appointment 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. 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 "Company Information" section to open a view of the pending submission. The check list will show that the fee is outstanding.

3. The OIC will review your pended renewal application upon receipt of the appointment renewal fee.

Renew appointments (must occur within 60 days of the appointment expiration date)

Before beginning the Appointment renewal process, you will need to determine what method of payment your company will be using:

1) e-check, or
2) hard copy invoice/mail check

The step-by-step process will vary depending upon which method you select.

1) E-check option

1) Prior to beginning, there are two factors to consider:
    a. If you company has a large number of appointments to cancel, it may be easier to use the "Terminate Appointments" process prior to attempting renewal.
    b. What your company's policy is regarding access to secure bank account information (bank routing and account numbers)? It may be necessary to add a Secondary User (please see "Create a Secondary User") in your company's accounting department and utilize the "Terminate Appointments" process prior to attempting renewal.

2) After terminating all appointments, select the "Appointment Renewal" button located on the left side of the home page.

3) The insurer information and a list of current appointments will display.

4) The default setting is to renew all listed appointments. If this list has been previously reviewed as suggested, and all unnecessary appointments have been terminated, click on the "Submit" button at the bottom of the page. If there are still appointments which need to be cancelled, you may review and terminate any additional appointments by clicking on the Action button (far right hand column) and changing the action from Renew to Cancel. Upon completing the review, click on the "Submit" button at the bottom of the page. This will take you to the fee payment page.

5) If your company requires prior approval for amounts paid by e-check, you may click on the "Print Prior Approval Invoice" link and print an invoice which shows the amount of the appointment renewal. **Please note: the prior approval invoice will not reflect any additional appointments or cancellations after the invoice is generated. The actual fee may vary depending upon the number of transactions that may have been added or cancelled.**

6) If your company requires someone in the accounting department to input the secure banking information for the e-check, you may want to add the accounting staff member as a Secondary User. The accounting staff member will need to:
    a. login to the system with the registered User ID/password
    b. click on the "Appointment Renewal" button (if not already
    c. click on the "Submit" button to reach the fee payment page

7) To complete the e-check payment, either by you or an accounting staff member, please enter all required fields and click the “Submit” button at the bottom of the page. This will take you to the “e-check verification page.” **Please note: the Verification page is for you to verify your information. Your payment will not be debited 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 a link to print the receipt for your online payment, and the link to view/print your company’s renewed appointments. A payment confirmation will be sent the payee’s email address.

2) Hard copy invoice / mail check

1. Prior to beginning, if your company has a large number of appointments to cancel, it may be easier to use the “Terminate Appointments” process prior to attempting renewal.

2. After terminating all appointments, select the “Appointment Renewal” button located on the left side of the home page.

3. The insurer information and a list of current appointments will display.

4. The default setting is to renew all listed appointments. If this list has been previously reviewed as suggested, and all unnecessary appointments have been terminated, click on the “Submit” button at the bottom of the page. If there are still appointments which need to be cancelled, you may review and terminate any additional appointments by clicking on the Action button (far right hand column) and changing the action from Renew to Cancel. Upon completing the review, click on the “Submit” button at the bottom of the page. This will take you to the fee payment page.

5. The fee payment page will display the e-check option as the default setting. If still wanting to continue with the hard copy renewal, select the “Alternate Payment Method” link at the bottom left-hand portion of the page. A warning message will appear which states you are choosing to generate an invoice and submit payment by mail. Click on the “OK” button to generate the invoice. **You will not be able to change your method of renewal once you click the “OK” button.** A message will appear asking you NOT to refresh, go back, or cancel this page while processing.

6. The confirmation will be displayed informing you that your appointment renewal has been pended and will not be approved until payment is received by the OIC. This message will also provide you with your transaction number and a link to generate your invoice.

7. Attach the check to the printed invoice and mail them to the OIC.

8. Your pended transaction may be tracked using the “View Pending Online Transaction” function and keying in your transaction number.

Print appointment(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" button at the bottom of the screen. This creates a PDF document of the requested certificates to open and print or save.

Appointment List

Click on "Appointment List" in the menu on the left. This will create a PDF list of all company appointments. When the PDF is opened, this list may be printed, saved electronically, or simply viewed.

Change Insurer Licensing Address

1. Select the "Change Address" link on the left side of the home page.
2. The current insurer licensing address information will display
3. Make necessary changes or corrections to the profile
4. Click on the "Update button at the bottom of the page. This takes you to the *Address Change Confirmation* page. You will receive a confirmation e-mail at the e-mail address you entered.
5. Your have now completed the address change process
6. Click on the "Home" button to go to the *Online Licensing Services* home page

Print Unpaid Invoice(s)

1. Select the "Print Unpaid Invoice(s)" link located on the left side of the home page.
2. The Company 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.

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

Washington State Office of the Insurance Commissioner