Insurer Portal Quickstart Guide

Version 1.1

18 January 2017

Introduction

This is a quickstart guide for insurer representative users of the FCNB Portal (https://portal.fcnb.ca). It shows how to set up an administrative user account and create other users, and provides a brief introduction to the main features of the portal as it relates to insurer representative users.

There are three types of insurer users:

- Administrative user – can create other users and approve sponsorship requests
- Approver user – can approve sponsorship requests
- Reviewer user – can complete a preliminary review of an application if an insurer prefers to split the sponsorship request review process into two steps.

Use of the Reviewer user is not required, but available for insurers to use of they so desire.

Please consult the FCNB Portal FAQ (http://fcnb.ca/portalfaq.html) for additional guidance and resources.

Setting up an administrative insurer account

Administrative insurer user accounts must be first set up by FCNB IT staff by way of an email request to support@fcnb.ca   Please provide the following information in your email:
- The full name of the administrative contact.
- The email address of the administrative contact.
- The full corporate name of the insurance company (sponsoring insurer).
- Particulars of whether the insurance company is a "life" or "other than life" insurer or both.

Upon processing of the request, the administrative contact will receive an email as follows:

Figure 1

Click on either the English or French link to start the account creation process.

This will open a browser and will bring the user to the Create Account page on the portal:

Figure 2

At this step, enter a secure password twice, select the language of preference, and provide an answer to one of three security questions (select from the drop down). Click the "Sign Up" button to proceed. This will then bring the user to the Profile page:
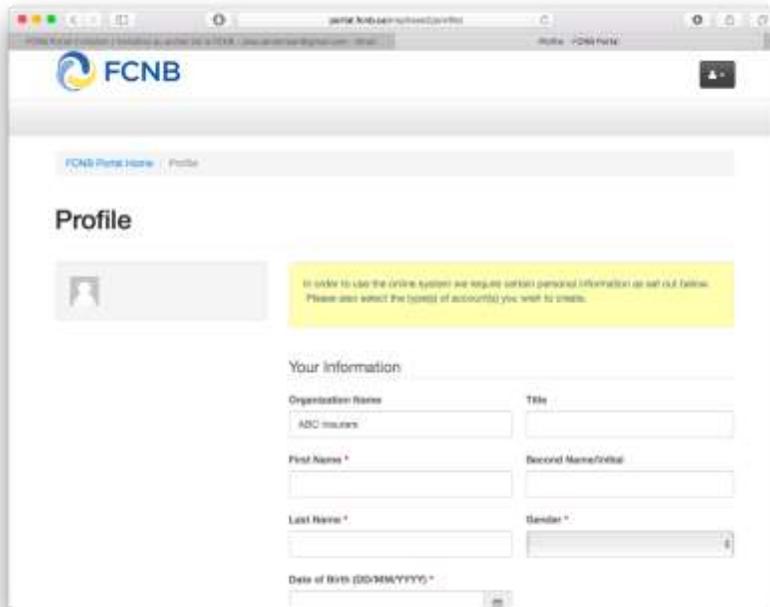
Figure 3

Complete all required fields on this page and check the box confirming agreement to the user agreement at the bottom of the page (click the blue text to read the agreement first).
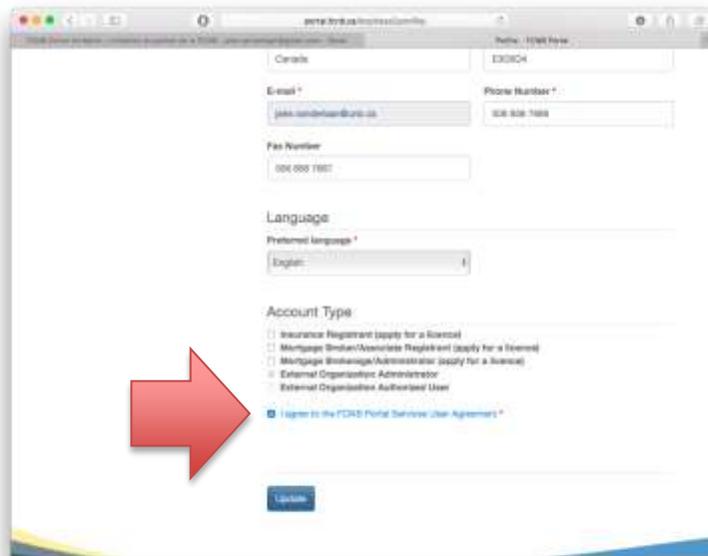
Figure 4

Note that the account type is pre-selected. Do not select any other account types at this time. Click "Update" when ready to proceed. A message in a green box, confirming a successful update, will appear:
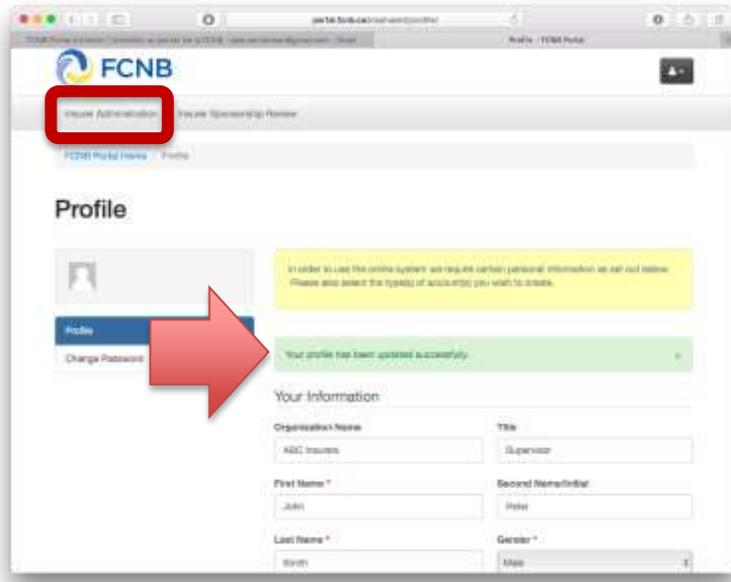
Figure 5

For Administrator users (not Approvers and Reviewers): Now click the "Insurer Administration" link in the top grey menu bar (see Figure 5).Insurer Administration

The Insurer Administration page will open:
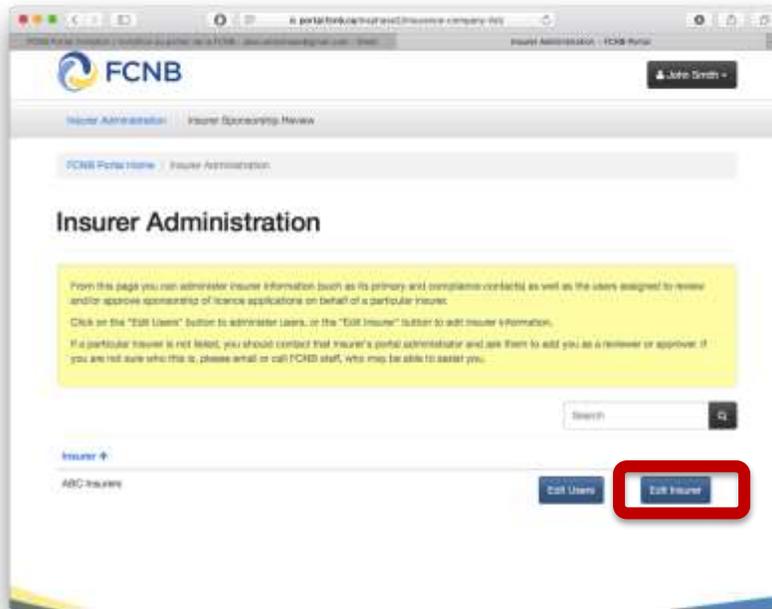
Figure 6

Your insurer should be listed at the bottom of the page. Click on the Edit Insurer button to add required information to the Insurer profile. This will open the insurer profile page:
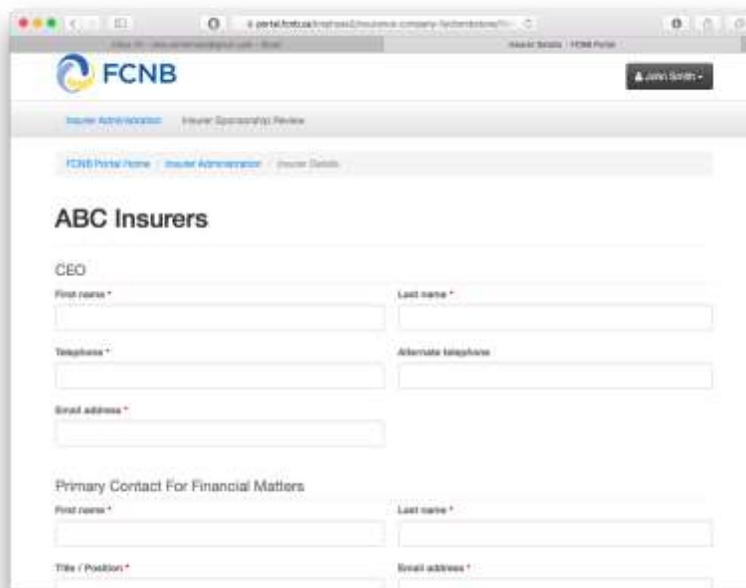
Figure 7

Please enter all required information in the designated fields. Click the "Submit" button at the bottom once done. A confirmation that the update was successful will display.

Now click again on the "Insurer Administration" link in the top grey menu bar, and then click the "Edit Users" button to the left of the "Edit Insurer" button (see Figure 6). This will display the Users page for the selected insurer:
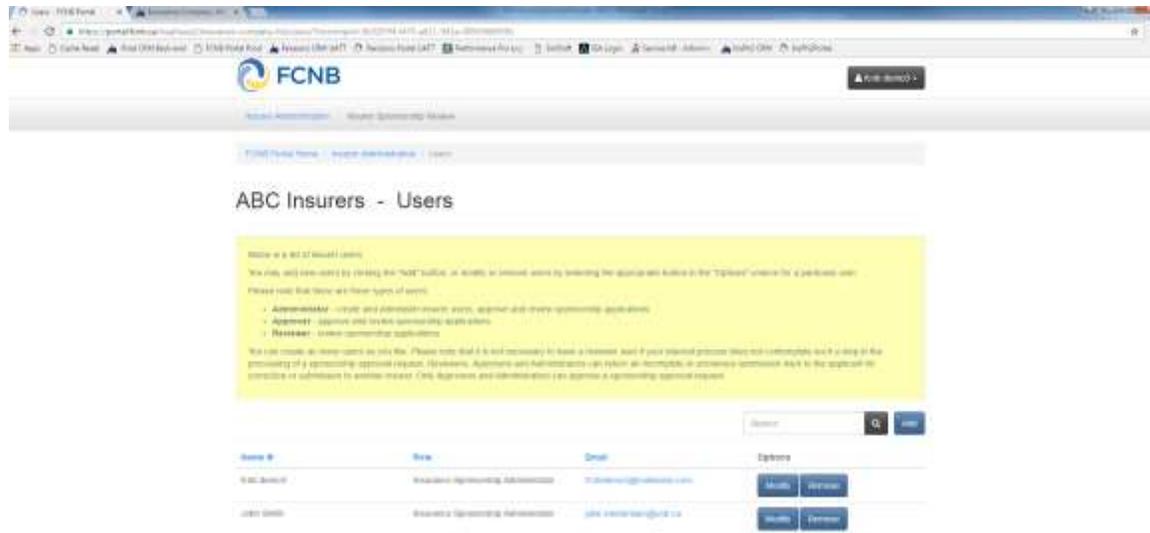
<p style="text-align:center">Figure 8</p>

The text in the yellow box provides an explanation of the types of users. Click on the blue "Add" button to add a new user. The administrative user will be asked to add an email address twice and to select the user type for each user. Once added the user will be listed on the Users page. The user will receive an email and will need to follow a process similar to the one set out above, before being able to use the portal. From this page you can also modify and remove users.

Insurer Sponsorship Review

Once an insurer user has completed their account set up, they can proceed to access licence applications submitted for the insurer. Click the "Insurer Sponsorship Review" link in the grey menu bar. This will open the following page:
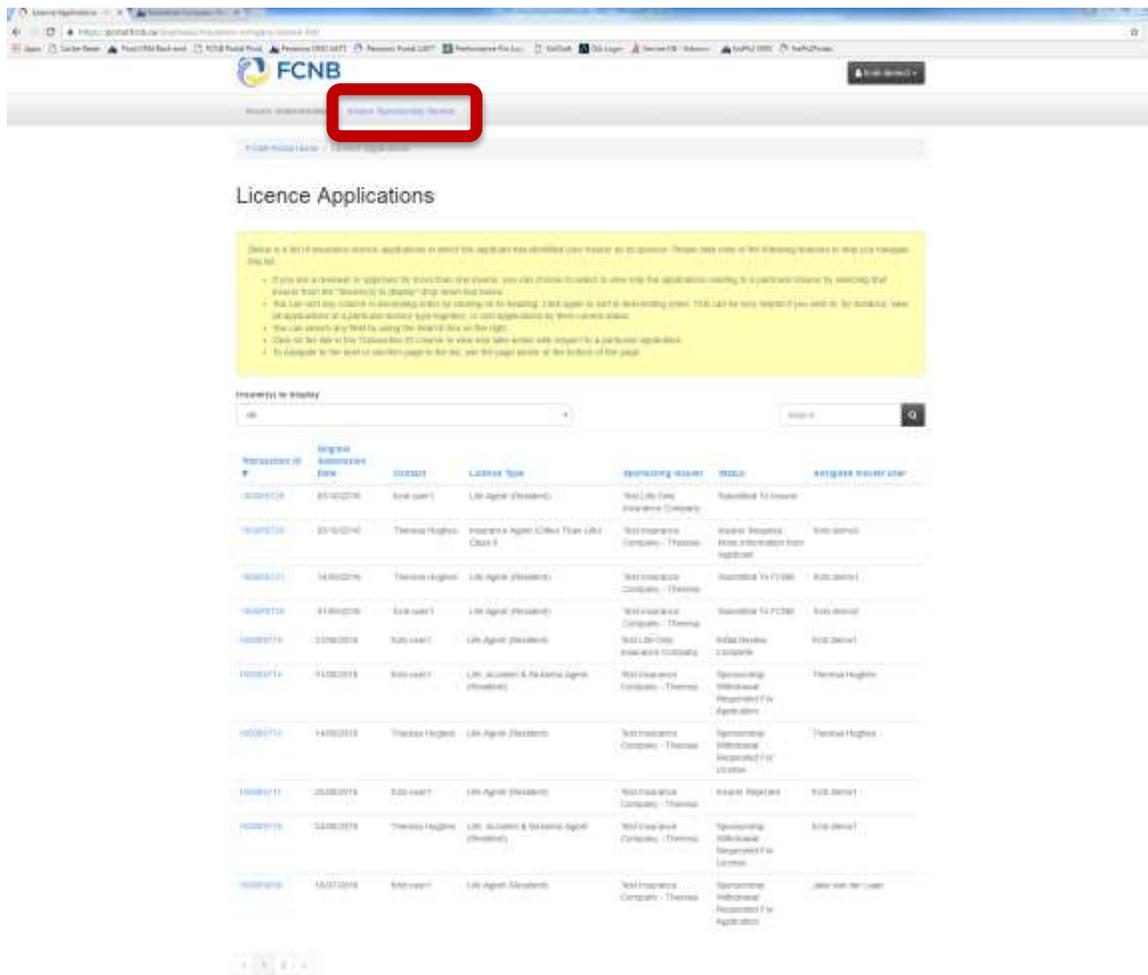
Figure 9

Applications submitted will be listed in the grid at the bottom of the screen (Figure 9). Detailed instructions and guidance is available in the yellow text box on each page.

To take action with respect to a particular application, click on the link in the 'Transaction ID' column. This will open the 'Licence Application Review' page. A portion of this page is shown in Figure 10.

From here you will be able to view the submitted application, download a copy of the application or take one of several actions on the application. You can add notes to the application and select or change the user assigned to review or approve the application. For either of these updates you must click 'Save' to save your changes.

You may also take the following actions using the action buttons at the bottom of the page (Figure 11)

Approve: Click this button to approve the sponsorship request (or in case you are a reviewer, approve the initial review of the application).

More Information Required: Click this button if you require additional information from the applicant or if the applicant has selected the wrong sponsoring insurer.

Reject: Click this button if you wish to reject the application for sponsorship. Once an application has been rejected, the applicant is not able to make any updates to the application.

If the applicant has selected the wrong sponsoring insurer, please use the Require More Information button, not the Reject button. This will allow the applicant to edit the application for the purpose of selecting the correct sponsoring insurer.

Back: Navigate back to the list of applications.
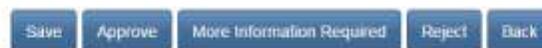
More Information Required

If you select 'More Information Required' this will open the following page where you will be required to specify details of what is required of the applicant (for example,

provide additional information, correct sponsoring insurer,or upload additional files). After clicking 'Confirm' the application will be returned to the applicant in 'Insurer Requires More Information from Applicant' status. The applicant will also be notified via email regarding the status update. The applicant can then sign into the portal to see details of what is required, make the appropriate updates and resubmit the application.
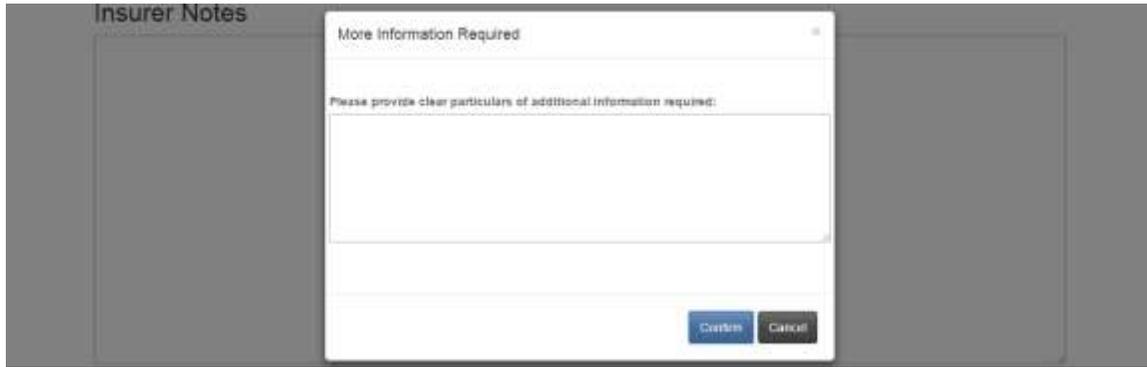
Reject

If you select 'Reject' this will open a screen where you will be required to provide the reason the application is being rejected. After clicking 'Confirm' the application will be returned to the applicant in 'Insurer Rejected' status. The applicant will also be notified via email regarding the status update. The applicant can then view the rejected application and details of the reason for rejection in the portal.
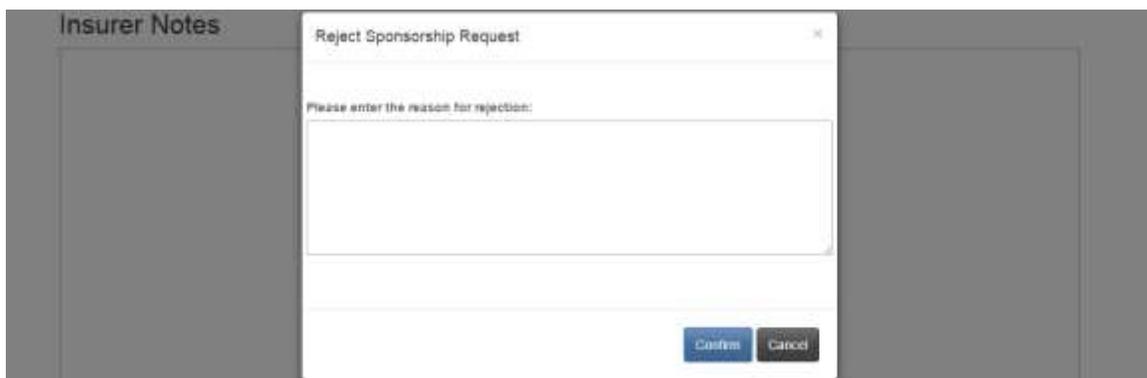
Withdrawing/terminating Sponsorship

For applications which have been approved for sponsorship by an insurer, and/or approved by FCNB, it is possible to withdraw such approval by clicking the 'Request Withdrawal of Sponsorship' button which is available at the bottom of the 'Licence Application Review' page.

Figure 14

The following page will appear:
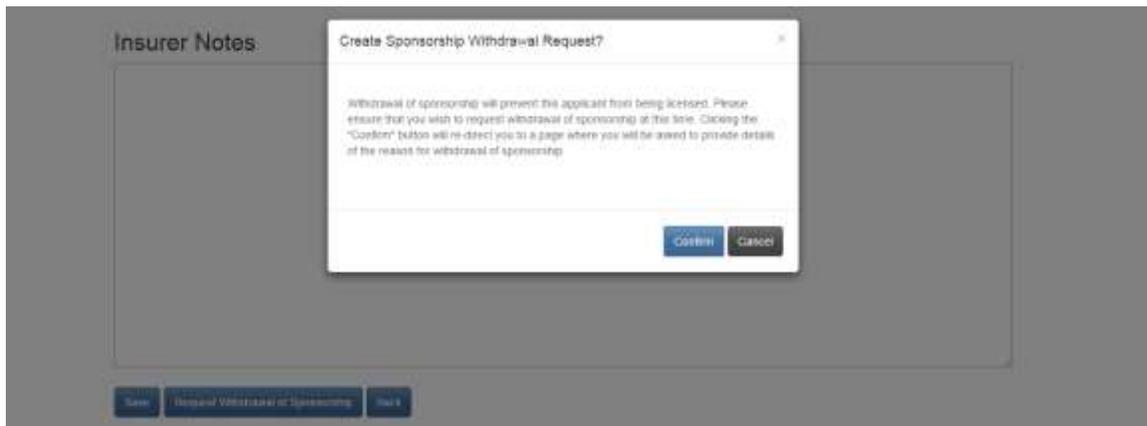
Figure 15

After clicking 'Confirm', you will be required to provide details of the reason for the withdrawal request.

If the application has been approved by the sponsor, but not yet approved by FCNB, the following page will appear:

Request Sponsorship Withdrawal

50%

Reason for withdrawal request

Please provide details of why you are seeking to withdraw sponsorship of this applicant.

Details *

[text box]

Submit   Close

Figure 16

After submitting the reason for the withdrawal request, the application will be set to 'Sponsorship Withdrawal Requested For Application' status.

If the application has been approved by the sponsor, and also approved by FCNB, the following page will appear:

Request Sponsorship Withdrawal

50%

Reason for withdrawal request

Please identify the reason(s) for your sponsorship withdraw request (please check all that apply). If you select 'Other', please provide details in the text box which will appear.

☐ Coercion
☐ Conflict Of Interest
☐ Forgery
☐ Fraud
☐ Lack Of Competence
☐ Licensing Violation
☐ Misappropriation Of Client Funds
☐ Misrepresentation
☐ Money Laundering
☐ Poor Products - Client Suitability
☐ Untrustworthiness
☐ Other

Submit   Close

Figure 17

After submitting the reason(s) for the withdrawal request, the application will be set to 'Sponsorship Withdrawal Requested For Licence' status.