



'Requires More Information' Guide (for insurance licencees)

Version 1.0

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Introduction

This is a guide for agent, adjuster, broker and damage appraiser licensees on how to respond to a request for more information regarding an application or renewal completed in the FCNB portal.

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

What is 'Requires More Information' status?

Once you have submitted an application or renewal, your sponsoring insurer or FCNB licensing staff may determine that certain information in your application or renewal is incorrect, incomplete or requires clarification (for example an additional document upload has been requested, your brokerage/firm information is not up to date, or you have selected the incorrect sponsoring insurer). In such a case, you will receive a system generated email advising more information is required.

You must then log back into the portal and make the required edits to your application or renewal and re-submit it.

How to respond to a 'Requires More Information' request

Log into the portal. On your My Insurance Licences page, you should now see your Licence Application or Renewal listed with either an 'Insurer Requires More Information from Applicant' or 'FCNB Requires More Information From Applicant' status (see Figure 1).

Transaction ID	License Number	Licence Type	Status ↓	Process Type	
160001105	160001105	Accident & Sickness Agent (Resident)	Insurer Requires More Information from Applicant - Unpaid	Licence Application	Manage
160021058	160021058	Insurance Adjuster Level 2	FCNB Requires More Information From Applicant	Licence Application	Manage

Figure 1

Click the 'Manage' button for the application or renewal with the 'Requires More Information' status. This will display the 'Actions' page for that application or renewal. At the top of this page, you will see a box with the 'Requires More Information' details (see Figure 2).

Insurance Licence Application Actions

160020243

Overview

Applicant *

Theresa Hughes

Licence Type *

Life Agent (Resident)

Message: Insurer requires more information

Please correct the name of your brokerage/firm and then re-submit.

Figure 2

Scroll to the bottom of the Actions page, where you will now see an 'Edit' or 'Edit Renewal' button (see Figure 3).

Actions

Edit Download Application Fee summary

Figure 3

Click on the 'Edit' or 'Edit Renewal' button.

Go through each screen of the application or renewal process and make corrections, changes, updates where and as required. Continue until you reach the final page and **be sure to click the Submit button** on the last screen. If you do not click 'Submit' at the end of the process, your application will remain in 'Requires More Information' status and will not be resubmitted.

Once you have successfully submitted your updated application or renewal, the application or renewal should now display in your list as Submitted or Re-submitted (see Figure 4).

Transaction ID	License Number	Licence Type	Status ↓	Process Type	
160001105	160001105	Accident & Sickness Agent (Resident)	Submitted To Insurer -Unpaid	Licence Application	Manage

Figure 4

You have now completed your response to the 'Requires More Information' request. You should continue to monitor your email for further messages from the system regarding the status of your application or renewal. You can also check the status of your application or renewal by logging back into the portal at any time.