

Industry Access Overview

Hello and welcome to the updated Industry Access Portal for the Louisiana Department of Insurance. Today we are going to show you an overview of the new portal with the goal of providing an experience that is insightful and will give you the knowledge to effectively and efficiently navigate to the desired information you are looking for.

Getting set up in Industry Access is an easy two-part process. The first step is to create a User login and password in Industry Access. The second part is to connect the User login to one or more licensees. A licensee is any regulated entity such as a Producer, an Adjuster, an agency or an insurance company.

Let's begin with the initial registration process. If you are new to Industry Access, you will need to register as a new user to create your Industry Access login and that is what I will do for this demonstration.

To begin the process, simply click Register. This brings up the sign-up page. The boxes marked with the red asterisk are required.

It is now time to enter a name and information of the person that will actually be using the log-in. It does not need to be the licensee. For this demonstration I will now enter my name, address and contact number, choose a security question and type in your answer, as well as enter your email address.

The last step to sign-up is to create a Password then click Register. Remember, the registration should be in the name of the person who will actually be using Industry Access. Even if you will request access to another person's license, you must still register under your own name.

A successful sign-up will display this Sign Up Submitted screen. You will also receive a confirmation e-mail containing a verification link. You can either, click on the link or copy and paste the entire link into your internet browser. This action will display the Verify Email page where you can click on login, bringing you back to the original login page.

I can now log-in since my account has been created and verified.

Now that I am logged in the next step is to connect my login with a licensee and a module function. To do this, I will click Request Module Access. Next, search for a Licensee. Licensee's can be searched by Last name, license number, NAIC number or NPN (National Producer Number). Today, for demonstration purposes I will enter 123 to begin my search. As you can see in the search returns there are examples of Name, NAIC and NPN results.

Now I will enter and select the actual name of the test Licensee I will be using and click ADD. I can now see the Licensee in the grid. If I click View, two fields will display below: Administrator Information and Request Module Access. If the licensee already has an administrator, this individual will be listed. It also

offers an option to replace the current administrator. If the licensee does not have an administrator, it will require you to request Administrator access, as shown with this second test licensee.

A little bit about administrators: What is an administrator? The administrator is the Industry Access user who has primary responsibility for a licensee's maintenance and compliance or to make filings on behalf of a licensee. It may be the licensee themselves or administrative personnel tasked with these responsibilities. Each licensee must have an administrator and there can only be one administrator for each licensee.

Module Access can be requested at the same time Administrator access is requested. Only modules that apply to a licensee will be available as options.

When requesting access to a module, just select the desired modules, click Next, verify the modules being selected then click Submit Module Request.

On the grid the requested module will now show a Status of Pending until access is granted or denied, at which point the status will change to either Active or Denied. To clarify what a module is, think of it as a function. Ask the question, What do I need to accomplish? This should help you determine what to request access to if you are unsure.

All administrator requests are submitted here to the Louisiana Dept of Insurance for approval and under normal circumstances take 24-48 hours to complete. All module access requests from additional users are sent to the administrator of a Licensee for approval. You will receive email from Industry Access confirming that your request has been submitted AND when your request has been granted or denied.

The last point to cover for this overview is the Home page. Here you can complete multiple tasks. As I discussed before you can request module access, go directly to your modules, view Your account details and access the help manual. These options can also be accessed from the banner on any screen. Let's look at the Your account page. Here you can update your personal information, change the security questions and answers and change your password.

Now, I will logout to show you what to do if you have forgotten your password. Your password can also be changed from the login screen by clicking the "forgot password" link.

You will be prompted to enter your email, answer the security question then reset the password.

To recap some important items, getting started is easy. Simply Register, receive your confirmation email, login and begin searching for Licensees and requesting access to modules. Another important detail to remember is that your Industry Access ID is not directly tied to your license number; meaning that once logging in for the first time you will not have access to your information, a search must be performed. Also, email confirmations are sent for all requests to verify the action was successful.

That concludes our overview of the Industry Access Portal. We hope that it has been informative and helps you get started.

As always we here at the Louisiana Department of Insurance strive to provide excellent service. If you have any additional questions or concerns please contact us at 1-800-259-5300. Have a great day and thank you for watching.