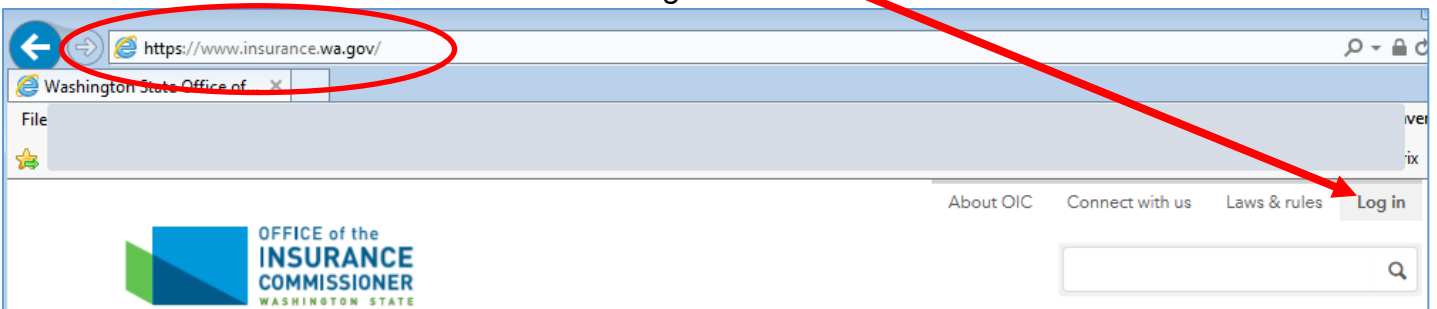


Accessing the Washington OIC Protection Product Guarantee web portal

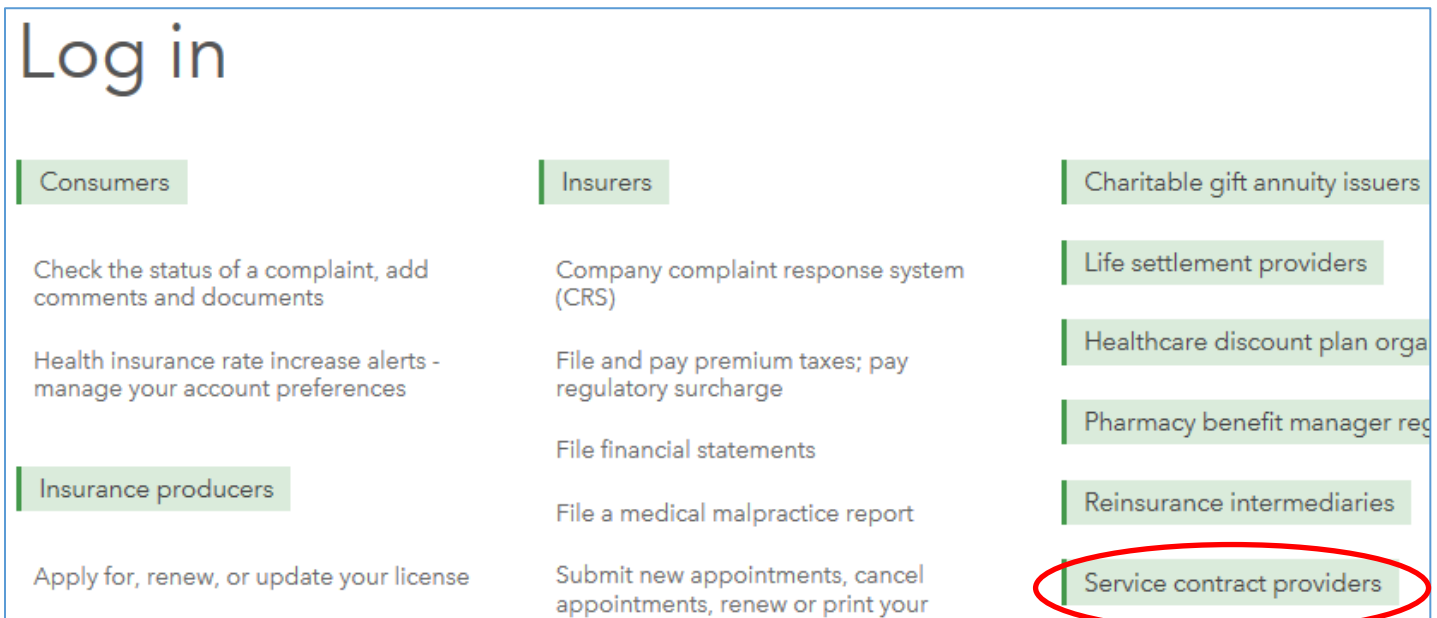
Welcome to the OIC online portal. These instructions will show you through the steps to make your **Protection Product Guarantee** (PPG) financial statement filing.

This training material was created on a test site. The actual site may be somewhat different.

To get to the web portal, start at the commissioner's web site (www.insurance.wa.gov).
Click the *Log in* button.



Click the *Service Contract Providers* button.



Accessing the Washington OIC Protection Product Guarantee web portal

Here is what the main screen looks like:

The screenshot shows the Washington State Office of the Insurance Commissioner's "Filing and Payment Center". On the left is a "USER LOGIN" box with fields for "User ID" and "Password", a "Go" button, and a "Forgot Password?" link. On the right is the "Find your Entity Contact" section, which includes input fields for "WAOIC:" and "OR NAIC:", and "Find" and "Clear" buttons.

Contact Person

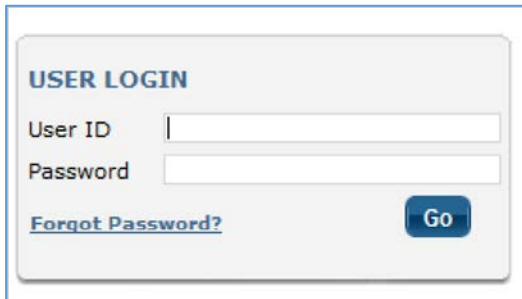
To find out whom your Financial Statement contact person currently is, you can type in your WAOIC number and then click the *Find* button.

This screenshot shows the search results for the "Find your Entity Contact" section. The "WAOIC:" field contains a redacted value, and the "OR NAIC:" field is empty. Below the search fields, the "Entity Name:" is followed by a long redacted line, and "Financial Statements/Auxiliary Annual Filings:" is followed by another redacted line. The "Find" and "Clear" buttons are visible next to the search fields.

Accessing the Washington OIC Protection Product Guarantee web portal

Logging In

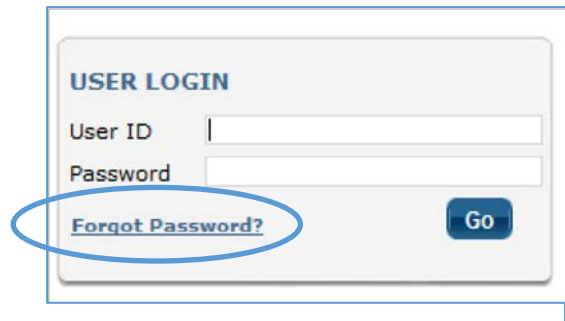
Enter your User ID and password, and then click the *Go* button. Your User ID is the letters “FIN” followed by your WAOIC number. For example: fin000000



The screenshot shows a login form titled "USER LOGIN". It contains two input fields: "User ID" and "Password". Below the "Password" field is a blue button labeled "Go". To the left of the "Go" button is a blue underlined link labeled "Forgot Password?".

Passwords

If you forget the password, or if the contact person has left, but **you have access** to their email account, you can use the *Forgot Password* link to get a temporary password sent to the email address in our records.



This screenshot is identical to the one above, but the "Forgot Password?" link is circled in blue to highlight it.

If you don't have access to their email account, you must contact us at CompanySupervisionFilings@oic.wa.gov with the new information. After we update the email address, you can then use the *Forgot Password* link to have a temporary password emailed.

Accessing the Washington OIC Protection Product Guarantee web portal

When you login with a temporary password, you must immediately change the password. Enter a new password that meets the criteria and click the *Submit* button.

Change Password

Please create a new password to continue. You either logged in using a temporary password or must strengthen your password. Password must be between 10 and 16 characters and contain at least three of the following: uppercase letters, lowercase letters, numbers, and special characters (< and &). It cannot contain the user login name, first name or last name.

Current or Temporary Password *

New Password *

Confirm New Password *

After changing the password, click the *Home* button.

Change Password

Confirmation

Your password has been changed successfully.

Home Screen

This is what the home screen looks like:

Company Filing Center

Menu Options

- Submit Filing**
- Add Document to Submitted Filing
- Make or View Payments
- View Submitted Filing
- Amend a Submitted Filing
- Change Password
- Update Contact Information
- Secondary User

WAOIC#: [REDACTED] Service Contract Provider

Your filing contact is the Insurance Commissioner's only point of contact for the Company Filing Center. Please take the time to verify your information using the menu option on the left.

See our agency web page for more details and complete [Filing Instructions](#).

Click the *Submit Filing* menu option to start the process to upload your financial statements.

Accessing the Washington OIC Protection Product Guarantee web portal

You're given the option to file your financial statements now or later.

Financial Statements

Are you going to attach a copy of the Registrant's financial statements for the year at this time?

Yes

No

If you choose "No", you must enter the date that you expect to file the financial statements. Then click the Save button. You'll get a confirmation on screen that the change was made.

Financial Statements

Are you going to attach a copy of the Registrant's financial statements for the year at this time?

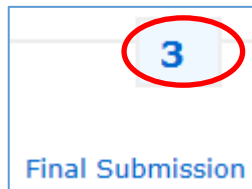
Yes

No

Provide the estimated date the Registrant will file the Registrant's financial statements.

The record has been saved on 1/20/2017 12:25:17 PM

Setting a later date will prevent receiving reminder emails if you plan to file after May 31. That's all that you need to do for now, so you can either click to go to Page 3 (Final Submission page) to ensure the contact person information is accurate, or click the *Logout* link (in the upper right corner).



If you click "Yes", you can upload your financial statements by clicking the *Documents* link.

Financial Statements

Are you going to attach a copy of the Registrant's financial statements for the year at this time?

Yes

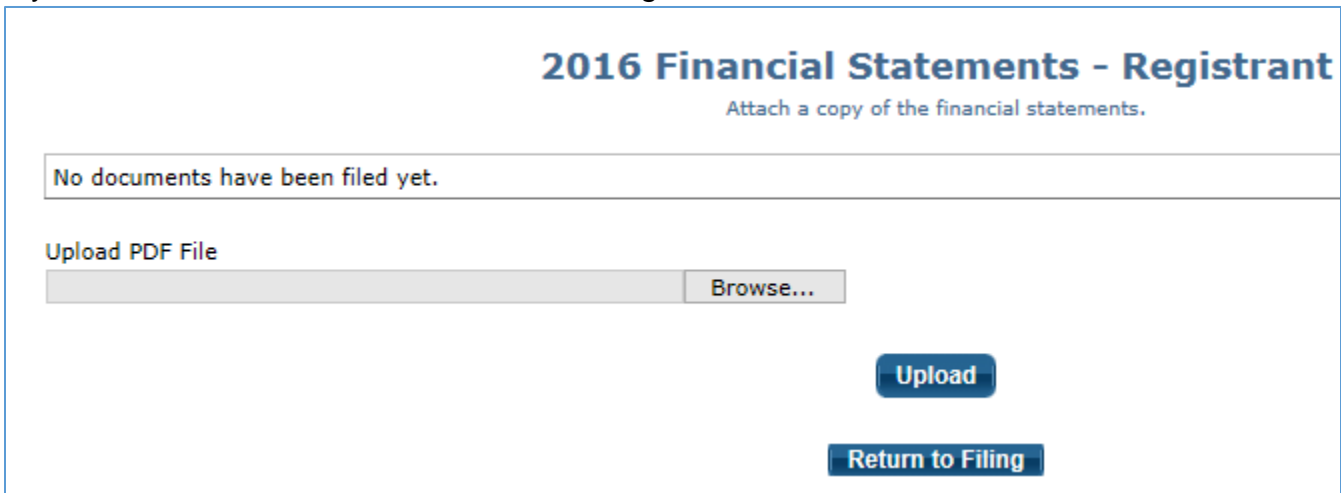
No

Attach a copy of the financial statements.
[\(0\) Documents](#)

Accessing the Washington OIC Protection Product Guarantee web portal

The screen changes to the Upload screen.

To go to the folder where your financial statements are stored, click the *Browse...* button. If you need to cancel, click the *Return to Filing* button.



2016 Financial Statements - Registrant
Attach a copy of the financial statements.

No documents have been filed yet.

Upload PDF File

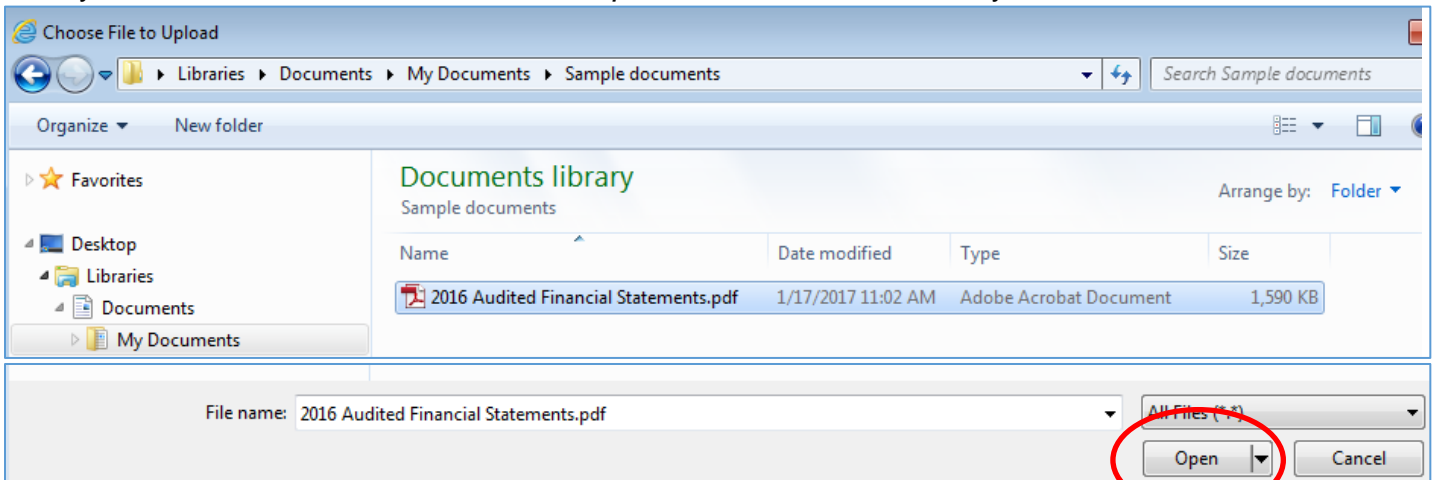
Browse...

Upload

Return to Filing

After you click *Browse*, a window will pop up and allow you to choose which file you want to upload. The file must exist somewhere that you have access to on your system. If you need help finding the document, please contact your company's computer support personnel.

After you find the correct file, click on the *Open* button. That tells our system where to find the file.



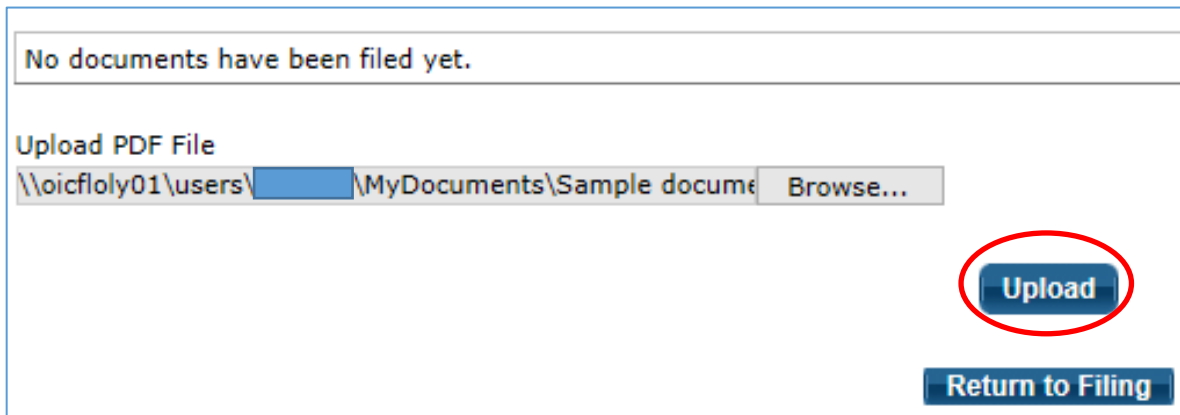
! It's important to ensure that you select the correct document. Once you upload a document, it becomes part of the OIC's records.

Accessing the Washington OIC Protection Product Guarantee web portal

The screen will now have the path and file name of your file showing in the box next to the Browse button.

If you're not sure that you have the correct file, either *Browse* again or click the *Return to Filing* button to cancel without uploading.

When you're sure you have the correct file. Click the Upload button.



No documents have been filed yet.

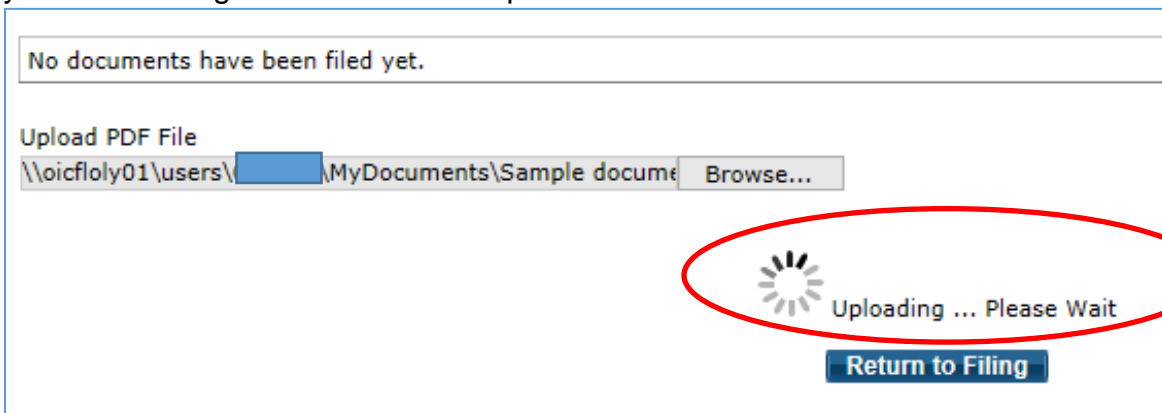
Upload PDF File

\\oicfloy01\users\[redacted]\MyDocuments\Sample document Browse...

Upload

Return to Filing

The system will show a message indicating that it is uploading your file. If you get an error message, please consult with your company's computer security or support personnel to help you ensure that you have the rights to access and upload the file.



No documents have been filed yet.

Upload PDF File

\\oicfloy01\users\[redacted]\MyDocuments\Sample document Browse...

Uploading ... Please Wait

Return to Filing

Accessing the Washington OIC Protection Product Guarantee web portal

After the file is uploaded, today's date will appear in the *Uploaded Date* area.

Uploaded Date	Description of Amendment
01/17/2017	

Click the *Return to Filing* button to return to page 1.

At this point, you can click the *Final Submission* button to fill out the declaration. However, if you click on the *Documents* link, you'll see the document that you uploaded.

Washington Filings				
Filings marked with asterisk (*) are required to be filed unless waived				
Due	Documents to be filed	Signature Required	Attachments	Last Uploaded Date
05/31/2017	2016 Financial Statements - Registrant *	Yes	1 Uploaded Files	01/17/2017

Final Submission (Page 3)

Please review the information for the Primary Report (Financial Statement) Contact and update as necessary. **We send the confirmation of this filing to the email address in this section**, so you'll want to make sure that it's correct. Make any changes necessary. Next, add or update the Compliance Officer contact information. This is the initial person that the OIC would contact if there is a compliance question.

Primary Report Contact Address				
Contact Person *	<input type="text"/>	Street 2	<input type="text"/>	
Street 1 *	<input type="text"/>	Country *	United States <input type="text"/>	
City *	<input type="text"/>	Zip *	<input type="text"/>	
State/Province *	Minnesota <input type="text"/>			
Email *	<input type="text"/>			
Phone # - Ext *	<input type="text"/> - <input type="text"/>	Fax	<input type="text"/>	Other Phone # <input type="text"/>
Compliance Officer Contact Address				
Contact Person *	<input type="text"/>	Street 2	<input type="text"/>	
Street 1 *	<input type="text"/>	Country *	United States <input type="text"/>	
City *	<input type="text"/>	Zip *	<input type="text"/>	
State/Province *	Washington <input type="text"/>			
Email *	<input type="text"/>			
Phone # - Ext *	<input type="text"/> - <input type="text"/>	Fax	<input type="text"/>	Other Phone # <input type="text"/>

Accessing the Washington OIC Protection Product Guarantee web portal

The OIC requires that the person filing the financial statement confirm that they have the authority to do so. Enter your name in the *Preparer Name* box and your company title in the *Preparer Title* box.

By submitting these documents electronically to the Office of the Insurance Commissioner, Company Supervision Division, the below Annual Filing Preparer certifies they have the authorization to submit the electronic documents to the Office of the Insurance Commissioner, Company Supervision Division, on behalf of the entity.

Under the penalties of perjury, by submitting the documents the Preparer below and the entity on whose behalf the documents are submitted declare that these documents have been examined by the officer providing the Annual Filing Attestation and to the best of this Preparer's knowledge and belief the information contained in the submitted documents are in all aspects true, correct, and complete.

Preparer Name *

Preparer Title * X

If you want a copy of the confirmation email sent to an additional address besides that of the Primary Report contact person, enter it in the box provided.

The Primary Report contact will receive an email confirmation. If you would like to send an email confirmation to another email address, enter it below.

Email copy of filing confirmation to

When you're ready to submit your financial statements, click the *Final Submission* button.

FINAL SUBMISSION button – to submit the completed annual filing to the Office of Insurance Commissioner (OIC). Once this button is clicked and the validation confirms there are no errors detected with the filing, the form will be sent to the OIC and will be considered the official annual filing. **Once you select Final Submission, the form can only be changed by amendment.**

Print

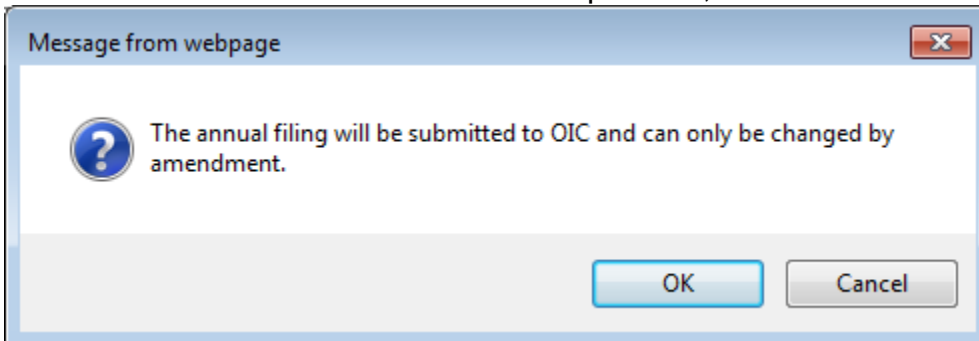
Validate Filing

Save

Final Submission

Previous

You'll get a pop-up message advising you that everything that you've entered and uploaded will be filed with the OIC. Click the OK button to proceed, or cancel to make further changes.

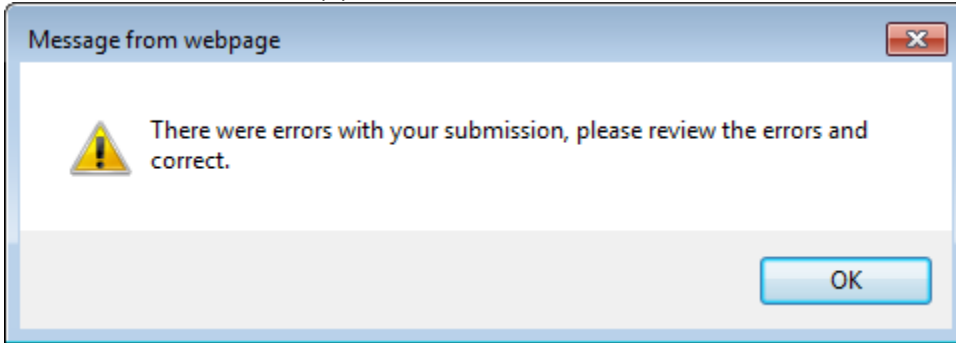


Validation Checks

The system runs validation checks to confirm that a document was uploaded and contact information filled in.

Accessing the Washington OIC Protection Product Guarantee web portal

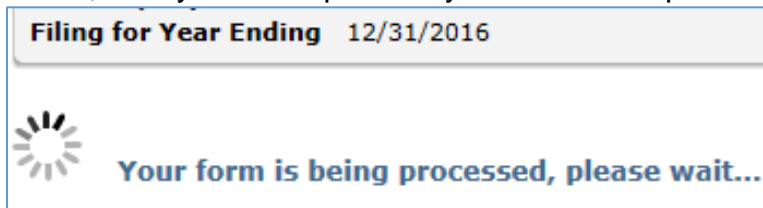
If anything is missing, a pop up message will let you know. If that happens, click the OK button. Then correct the error(s).



The system will highlight where the error(s) occurred with red text. For example:

Compliance Officer Contact Address	
Contact Person *	<input type="text"/>
Contact Person is required.	
Street 1 *	<input type="text"/>
Street 1 is required.	

After you correct the error(s), click the Final Submission button again. If there are no validation errors, the system will process your Annual Report.



After accepting your filing, the system confirms receipt on the screen and sends a confirmation email to the Annual Report Contact Address.

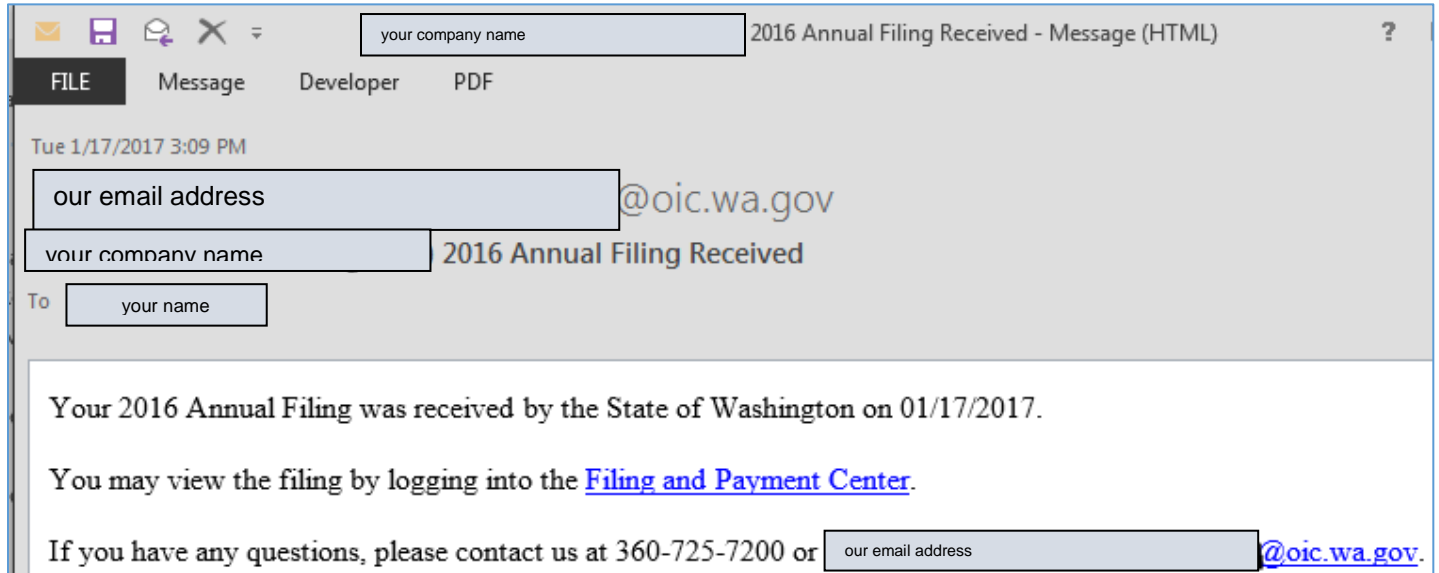
WAOIC#: [REDACTED]
Filing for Year Ending 12/31/2016
Confirmation
Thank you for submitting your annual filing form on 01/17/2017. A confirmation email has been sent to [REDACTED]@[REDACTED]
Print My Submitted Form Main Menu Logout

Accessing the Washington OIC Protection Product Guarantee web portal

The system now offers you the option to print your Annual Report to a PDF file. You can also return and print it later.

You may now exit by clicking the *Logout* button or you can go back to the Main Menu.

Here's a sample of the confirmation email:



The remaining training materials were designed for Vehicle and Non-Vehicle Service Contract Providers. Those companies file an annual report. However, the *Portal menu options* information is similar enough to PPGs that you can learn about the other menu options available, such as authorizing secondary users.