User Guide

Insurance Commissioner Certification - ICC

CONTENTS

1. **Access – to access the ICC Platform go to the OCS webpage http://ocs.pr.gov**

   1) Enter the URL that was provided in your preferred browser (Chrome, Firefox, Edge, etc.).

Image #1: Log in Page
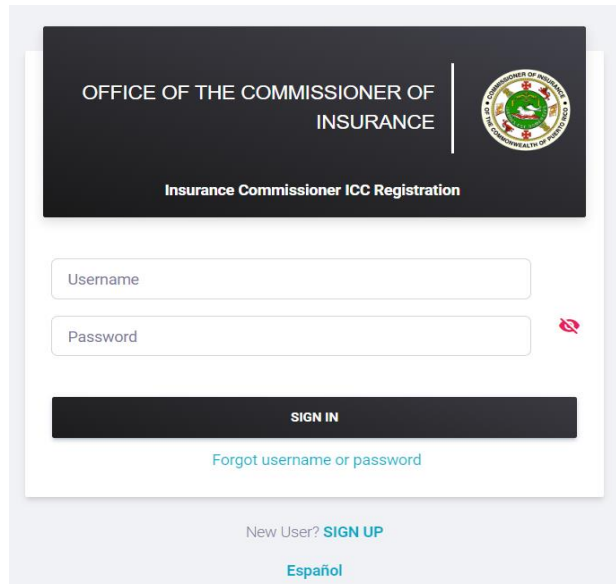
2. **User Registration**

   2.1 **Register**

   1) On the Login Page click on **SIGN UP** to create an account.

   2) Select the type of entity that you represent by clicking

   on ○ Government Office ○ Municipality ◉ Non-Profit Organization .

   Note: If your selection is a Government Entity or a Municipality, it should appear in the dropdown list. If you are a Non-Profit Organization, you must enter the name of your organization manually.

   3) Enter the required (*) information to register your account. Both last names are required.

   4) Select preferred language by clicking on ○ English ◉ Spanish .

   5) Download the Authorization Form by clicking on **⬇ AUTHORIZATION FORM** .

   6) Complete and upload the Authorization Form by clicking

   on *Place your completed Form of Authorization* .

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7) Click on ☐ Terms and Conditions checkbox, to acknowledge that third parties may provide information for the Office of the Commissioner of Insurance of Puerto Rico to authenticate your identity.

Type the characters you see in the image:

8) Complete the CAPTCHA [   ] by typing the characters on the image in your screen and click on **SEND** .

2.2 Validation of registration and user activation

1) You will receive an email with instructions, including an access link, username, and temporary access code.
2) Click the provided link to activate your account.
3) The temporary access code must be used to complete the registration process.

3. Login Page

1) Enter your username and password and click on **SIGN IN** .

3.1 Home Page

Icons:

1) On the upper right corner, you will find four icons that are presented and explained below.

- Home Page 🏠 - Click on the icon to go to Home Page.

- Profile 👤 - Click on the icon to view or edit personal info, change password, and manage account security or sign out.

- Notifications 🔔³ - Click on the icon to view recent notifications regarding applications or messages.

- Language 🌐ES - Click on the icon to change language (Spanish or English).

2) Other icons in the Home Page include "Create ICC Application" and "Message Center", these icons are explained in detail in Section 5 (Create ICC Application) and Section 6 (Message Center) of this document.

3.2 My applications
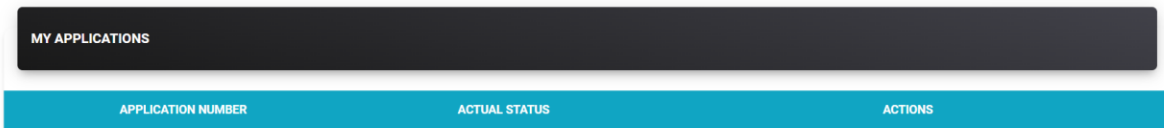

MY APPLICATIONS		
APPLICATION NUMBER	ACTUAL STATUS	ACTIONS

Image #2: My Applications screen

1) In "My Applications" section on the bottom of your home page, you can find your application's number, actual status (Incomplete, Submitted, Cancelled, etc.) and actions.

Actions Icons:

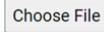a. **Incomplete status**:
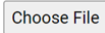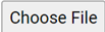
- Click on **CONTINUE →** to continue with the application process.

- Click on **–** to delete the document.

b. **In Progress or Resolved Status**:

- Click on 👁 to view your application information.

- Click on 📄 to manage your documents.

- Click on 💬 to view your messages.

- Click on 🕐 to view the history of actions of your application.

4. Create ICC Application

1) Click on **+ CREATE ICC APPLICATION** to start your application process.

2) You must complete the required information on the Create ICC Application screen and click on **NEXT →** to continue with your application process.

3) In the ICC Formal Request Document screen, select a document type, add a description (optional), and upload the required documents by clicking on Choose File (Note: All documents must be in .pdf format). If the documents were successfully uploaded, they will appear on "Documents Uploaded" section. You may also delete the document by clicking on **–**. Click on **NEXT →** to continue with your application process.

4) PART 1: The Applicant must provide documentation related to their Insurance Program, particularly for any asset for which PA funding with a related O&M obligation is expected and its Operating Expenditures. You must select a document type and upload a document for all required document types. Click on `Choose File` to upload the document and then click on `NEXT →` to continue with your application process.

5) PART 2: The Applicant must provide documents related FEMA Disaster O&M Requirements. You must select a document type and upload a document for all required document types. Click on `Choose File` to upload the document and then click on `NEXT →` to continue with your application process.

6) In the "Applicants information" screen, click on ☐ to certify that the information described above is correct and the description of the controversy states your position adequately regarding the situation you request to be investigated. You can also click on `CASE DETAILS` to view details of your application. Click on `SEND →` to send your application. Click on `FINISH` to finish your application.

5. Message Center

1) In the "Inbox" section, you can access your messages. If there is more than one page, you can access older messages by clicking on `< 1 2 3 >` to move through the pages.
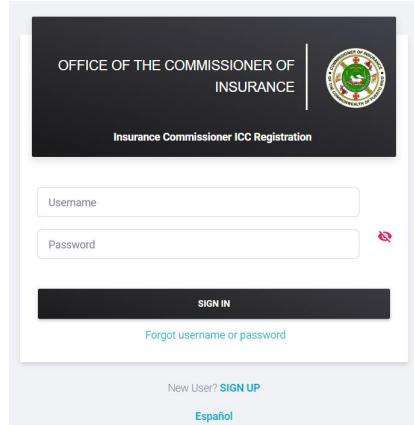   **View Section Icons:**
   - Click on 🖾 to read the message or click on ↰ to reply.
   - Click on `+ NEW MESSAGE` to create a new message.
   - Click on `Sent ←` to view your sent messages.

6. Admin Role
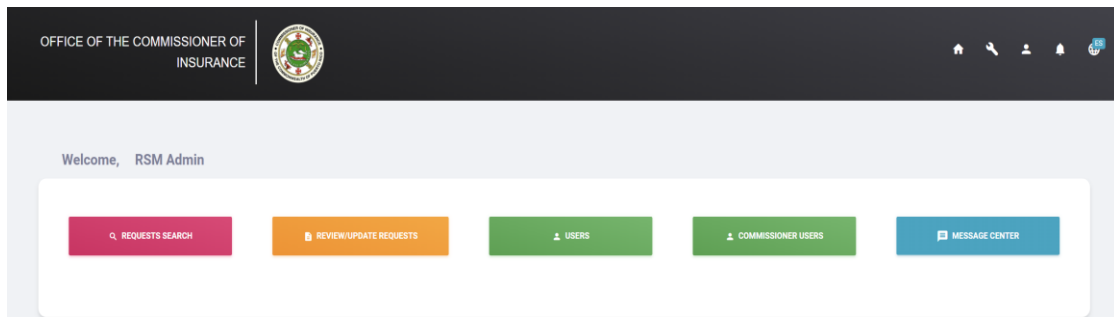
6.1 Login Page
1) Enter your username and password to access your account.
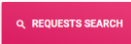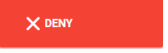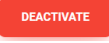
Image #3: Login Page

6.2 Home Page

Image #4: Admin Home Page

1) In the right upper corner, you will find five icons which are presented and explained below:

- Click 🏠 to go to Home Page.

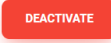- Click 🔧 to access the Maintenance Menu. The Maintenance Menu is explained in detail in Section 7.3 (Maintenance Menu) of this document.

- Click 👤 to view your profile or to sign out.

- Click on 🔔 to view your notifications.

- Click on 🌐 to change language (English or Spanish).

2) In your Home Page you can also find other icons presented and explained below:

- Click on **Q REQUESTS SEARCH** to find a specific application. You can search/filter by case status, case number or by date.

- Click on **REVIEW/UPDATE REQUESTS** to manage the applications. Click on ◉ to modify/review an application. In the "Review Update Request Screen", you can view the documents submitted, the history and messages related to the application. You can also approve or deny the application by clicking on **✓ APPROVE** or **✕ DENY** respectively.

- Click on **👤 USER** to view user's information such as name, agency, and email address. Click on ◉ to edit user information. Click on **🖫 SAVE** to save changes. You can also activate or deactivate the user account by clicking on **ACTIVATE** or **DEACTIVATE** respectively.

- Click on **👤 COMMISSIONER USERS** to view commissioner's user's information that includes name and email address. Click on **+ ADD USER** to create a new user. Click on ◉ to edit user's information. Click on **🖫 SAVE** to save changes. You can also activate or deactivate the user's account by clicking on **ACTIVATE** or **DEACTIVATE** respectively.

- Click on **🗨 MESSAGE CENTER** to access your inbox or send a new message.

6.3 Maintenance Menu
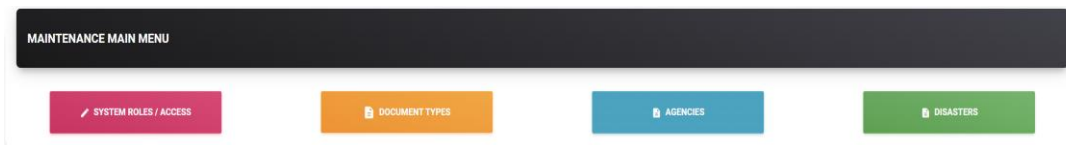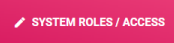
Image #5: Maintenance Menu

- Click on **✎ SYSTEM ROLES / ACCESS** to manage system roles and access. Click on **+ ADD** to create a new role or click on ✎ to modify an existent role.

- Click on **📄 DOCUMENT TYPES** . Click on **+ ADD** to create a new document type. Click on ✎ to modify an existing document type.

- Click on **📄 AGENCIES** to manage agencies configuration. Click on **+ ADD** to create a new agency, click on ✎ to modify or click on ✕ to delete an existing agency.

- Click on **📄 DISASTERS** to manage disasters configuration. Click on **+ ADD** to create a new disaster. Click on ✎ to modify an existing disaster.

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