

Insurance Council

BRITISH COLUMBIA

Annual Licence Renewal

Bulk Payments

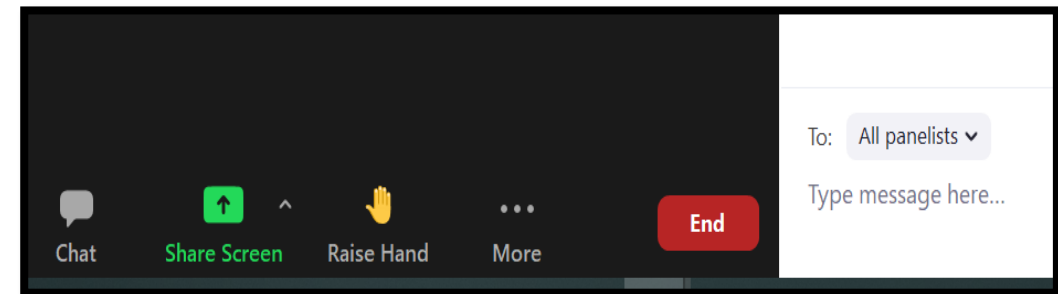
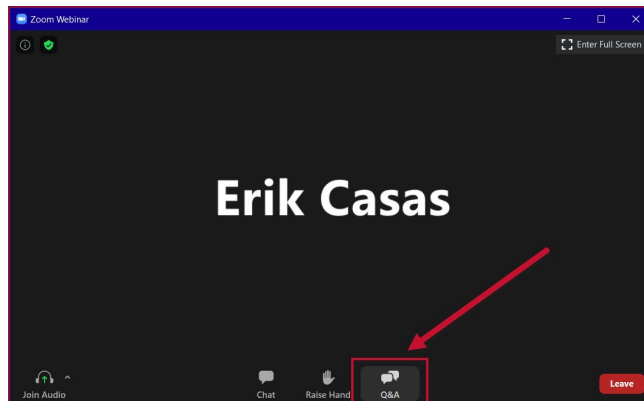
March 2022

Melissa Radic
Manager, Administrative Services



Webinar Tips

Using the Q&A and chat: Use the Q&A function to submit a question and Chat to Panelists if you need technical support. We will post relevant links in Chat.



What We'll Cover:



- Overview of annual licence renewal requirements
- Step-by-step process for individual licensees
- Step-by-step process for nominee (or delegate)
- Bulk payment options
- Frequently asked questions
- Q&A

Annual Licence Renewal Requirements



Overview of Annual Licence Renewal Requirements (formerly 'Annual Filing')

- **Who needs to renew?**

- An annual licence renewal is required for every licence that is held with the Insurance Council (individual or corporate), regardless of active, inactive or suspended status.

- **When does the renewal period start and end?**

- Annual licence renewal opens in early April (this year, April 1st) and the deadline to submit the payment is June 1st annually. The late renewal period runs until Tuesday August 2nd, 2022.

Overview of Annual Licence Renewal Requirements

- **What is required for an annual licence renewal?**
 - Confirming compliance with licensing requirements (Declaration)
 - A fee (paid at the time of the declaration, or by the agency/firm at a later date)
- **What is the annual licence renewal fee?**

	If paid by June 1, 2022	If paid by August 2, 2022
Individual	\$260	\$260 + \$150 late fee
Corporate	\$475	\$475 + \$300 late fee

Overview of Annual Licence Renewal Requirements

- **Where to submit the declaration and fee?**
 - All annual licence renewal declarations and fees are submitted via the online portal.
- **Why is annual licence renewal required?**
 - It is a requirement under Council Rule 4(4) for continuous licensing.
 - Licences will be automatically terminated if the fee is not received by Tuesday August 2nd, 2022.

Individual Licence Renewal Step-by-Step



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I want to ...

Licences

- ▶ [Apply for a personal licence](#)
- ▶ [Complete my annual licence renewal](#)
- ▶ [View my licence record\(s\)](#)
- ▶ [Manage my applications](#)
- ▶ [View/Print my receipts](#)
- ▶ [View/Print my licence certificate](#)
- ▶ [Update my declarations](#)



Exams

- ▶ [Register/Manage my LLQP exams](#)
- ▶ [Confirmation of Online LLQP Exams](#)
- ▶ [View my exam confirmation letter](#)
- ▶ [View my exam results](#)
- ▶ [View/Print my receipts](#)

Continuing Education

- ▶ [CE Self-Tracker](#)
- ▶ [CE Course Registration](#)

Contact Information

- ▶ [Update my portal login information](#)
- ▶ [Change my password](#)
- ▶ [Update my contact information](#)

For Corporations/Insurers/Direct Writers

Corporate Licences

- ▶ [Apply for a corporate licence](#)
- ▶ [Manage my applications](#)
- ▶ [Manage my Agencies/Firms](#)
- ▶ [List and manage bulk renewal payments](#)
- ▶ [Manage Prepaid Accounts](#)
- ▶ [Manage Authorizations to Represent \(ATR\)](#)
- ▶ [Manage delegates](#)
- ▶ [Verify Applicant Applications](#)

Insurers/Direct Writers

- ▶ [Pay my annual fee](#)
- ▶ [Manage Authorizations to Represent \(ATR\) - Direct Writers](#)
- ▶ [List and manage bulk renewal payment](#)

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Annual Licence Renewal Instructions

Annual Licence Renewal

Online licence renewal for 2022 is now open. Submitting your annual licence renewal online consists of several steps; the instructions below will show you the steps to expect. This process will take approximately 10 minutes.

Please use the buttons in the portal to navigate from screen to screen and avoid using your browser buttons.

While completing the renewal process, be prepared to:

1. Review your contact information and update it, if necessary. The Insurance Council sends important communications to licensees by email; consider adding a second email address to your account and ensure you are receiving Insurance Council communications.
2. Review your authority to represent information, if applicable.
3. Submit the necessary declarations to confirm you are meeting your licensing requirements. These declarations are as follows and will differ depending on your licence class:
 - You understand and are aware of your obligations under [Council Rules](#) and the [Code of Conduct](#) (applies to all licensees).
 - You have completed, or will complete by May 31, 2022, your [Continuing Education requirements](#) (applies to all individual licensees, even if you're not actively working).
 - For non-resident licensees, your home jurisdiction has continuing education requirements and you are meeting those (applies to individual non-resident licensees).
 - You have the authority to represent (ATR) at least one insurer (applies to all licensees).
 - You are currently covered by [Errors and Omissions insurance](#) in the amount required under Council Rule 7(11) (applies to all licensees).
 - Where required, you have submitted all [mandatory notifications/disclosures](#) to the Insurance Council (applies to all licensees).

If you are unable to declare that you are meeting the above licensing requirements, then you'll need to explain why you do not meet the requirement before you are able to complete your renewal.

4. Submit payment **OR** indicate that you have an agreement with your agency or firm that they will submit payment for you.

See our 2022 Annual Licence Renewal Page for [detailed instructions](#) and [more information](#).

[Proceed to Annual Licence Renewal](#)

Step 1: Start Renewal Process

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Payment Items (0) Logout

[Home](#) / [Licenses](#)

[Download/export selected](#) | [Add to Payment Items](#)

Quick Search

☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2022-0032897-R01	Life Licence - Individual	Active	Camomile Chai	Vancouver	Renew Licence	2022-06-01

Step 2: Review/Update Contact Information

 Main Menu

Payment Items (0) Logout

[Home](#) / [Contact Information Verification](#)

Contact Information Verification

Licensees have an obligation to provide notification to the Insurance Council of BC of a change in contact information.

Please confirm that your contact information is up to date by selecting "Yes".

If you are unsure or need to make a change to your contact information, please select "No", and then click on the link provided to update your contact information before proceeding with your annual licence renewal.

☐ Yes ☒ No



Before completing your annual licence renewal you must review you contact information and update as necessary. To review and update your contact information click [here](#).



Continue

Step 2: Review/Update Contact Information

 [Main Menu](#)

[Payment Items \(0\)](#) [Logout](#)

[Home](#) / [Contact Information Verification](#)

Contact Information Verification

Licenses have an obligation to provide notification to the Insurance Council of BC of a change in contact information.

Please confirm that your contact information is up to date by selecting "Yes".

If you are unsure or need to make a change to your contact information, please select "No", and then click on the link provided to update your contact information before proceeding with your annual licence renewal.

☒ Yes ☐ No

[Continue](#)



Step 3: Select Payment Preference

Payment Options

PAYMENT OPTIONS

* I have an agreement ☒ Yes ☐ No
with my agency/firm
that they will pay for
this renewal:

Continue »



Step 4: Practice Questions

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Payment Items (0) Logout

To help the Insurance Council offer more effective services and technology, we are asking a few questions about licensees' practice information that will allow the Insurance Council to better understand licensees' needs and business environment.

Providing this information is entirely optional, but is encouraged as it will help us develop appropriate practice tools and resources for licensee support.

* indicates a required field.

Practice Information (Optional)

Questions in Development

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Continue »



Step 5: Review ATR Information

* indicates a required field.

Active Employer List

ACTIVE ATR

Please review the authorization to represent information that the Insurance Council has on file for you. If any of the information displayed here requires updating, this can be done by your employer via the corporate portal account or by submitting an Add/Remove ATR form to the licensing team. Please refer to our [Holding Out \(Authority to Represent\)](#) section on our website for more information. You cannot update this information through your portal account.

If your current employer is not listed, they will not be able to submit payment for your annual filing fee on your behalf, but you can still complete your filing declaration now.

Please click Continue to proceed with your annual filing.

Showing 1-1 of 1

Employer Name	Effective Date
Cup of Tea Insurance Agency Ltd.	03/01/2021

[« Back](#) [Continue »](#)



Step 6: Confirming Compliance with Licensing Requirements (Declaration)

Individual Declaration

☒ ☒ ☒ **Declarations in Development**

 **Confirm**

Individual Declaration

☐ I understand and am aware of my obligations under the Council Rules and the Code of Conduct

You've not confirmed that you are aware of your obligations under the Council Rules and the Code of Conduct. Explain why

Step 7: Review and Submit

 Main Menu

Payment Items (0) Logout

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Continue »

Individual Licence Filing

Please review information below. If any updates are needed, click Edit beside the section requiring updates. Once review is complete click Continue at the bottom.

Payment Options

PAYMENT OPTIONS

I have an agreement with my agency/firm that they will pay for this renewal:

Edit

Practice Information (Optional)

GENERAL INFORMATION

Edit

Step 8: Confirmation



Your renewal declaration has been submitted!

NOTE: Your annual renewal is not fully complete until Insurance Council of BC receives payment from your agency/firm. Please follow up with your agency/firm regarding timing of payments. Your renewal status can be confirmed by viewing your records in your online account.

It is your responsibility to ensure that your renewal fee is paid, even if your agency or firm is submitting it on your behalf.

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Corporate Annual Licence Renewal Step-by-Step



Step 1: Start Annual Licence Renewal

.....

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[Home](#) / [Licenses](#)

[Download/export selected](#) | [Add to Payment Items](#)



☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2022-0032895-R01	General Licence - Corporate	Active	A Cup of Tea Insurance Agency Ltd.	Vancouver	Renew Licence	2022-06-01

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[Home](#) / [Licenses](#)

[Download/export selected](#) | [Add to Payment Items](#)



☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2022-0032901-R01	General Licence - Individual	Active	Orange Pekoe	Vancouver	Renew Licence	2022-06-01
☐	LIC-2022-0032900-R01	General Licence - Individual	Active	Dar Jeeling	Vancouver	Renew Licence	2022-06-01

Step 2: Select Payment Preference

Payment Options

Renewal

* I would like to include ☒ Yes ☐ No
this renewal fee in a
bulk payment.:

Continue »

Payment Options

Renewal

* I would like to include ☐ Yes ☒ No
this renewal fee in a
bulk payment.:

Continue »

Step 3: Practice Questions

Step 4: Declaration

Corporate Declaration

- ☒
- ☒
- ☒
- ☒

Declarations in Development

Confirm

Step 5: Review and Submit

Step 6: Confirmation



Your renewal declaration has been submitted!

NOTE: From the main menu, please select List and manage bulk payments to process your renewal payment. This annual renewal is not complete until the payment has been received by the Insurance Council.

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Bulk Payments



List and Manage Bulk Renewal Payments

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I want to ...

Licences

- ▷ Apply for a personal licence
- ▷ Complete my annual licence renewal
- ▷ View my licence record(s)
- ▷ Manage my applications
- ▷ View/Print my receipts
- ▷ View/Print my licence certificate
- ▷ Update my declarations

Exams

- ▷ Register/Manage my LLQP exams
- ▷ Confirmation of Online LLQP Exams
- ▷ View my exam confirmation letter
- ▷ View my exam results
- ▷ View/Print my receipts

Continuing Education

- ▷ CE Self-Tracker
- ▷ CE Course Registration

Contact Information

- ▷ Update my portal login information
- ▷ Change my password
- ▷ Update my contact information

For Corporations/Insurers/Direct Writers

Corporate Licences

- ▷ Apply for a corporate licence
- ▷ Manage my applications
- ▷ Manage my Agencies/Firms
- ▷ List and manage bulk renewal payments
- ▷ Manage Prepaid Accounts
- ▷ Manage Authorizations to Represent (ATR)
- ▷ Manage delegates
- ▷ Verify Applicant Applications



Insurers/Direct Writers

- ▷ Pay my annual fee
- ▷ Manage Authorizations to Represent (ATR) - Direct Writers
- ▷ List and manage bulk renewal payment

Manipulating the List

 Main Menu

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[Download/export selected](#) | [Add to Payment Items](#)

Quick Search



☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2022-0032901-R01	General Licence - Individual	Active	Orange Pekoe	Vancouver	Pay Fee Due for Renewal	2022-06-01
☐	LIC-2022-0032900-R01	General Licence - Individual	Active	Dar Jeeling	Vancouver	Pay Fee Due for Renewal	2022-06-01
☐	LIC-2022-0032899-R01	General Licence - Individual	Active	Lady Grey	Vancouver	Pay Fee Due for Renewal	2022-06-01
☐	LIC-2022-0032898-R01	General Licence - Individual	Active	Jasmine Green	Vancouver	Pay Fee Due for Renewal Pay Fees Due	2022-06-01
☐	LIC-2022-0032895-R01	General Licence - Corporate	Active	A Cup of Tea Insurance Agency Ltd.	Vancouver	Pay Fee Due for Renewal	2022-06-01
☐	LIC-2022-0032894-R01	General Licence - Individual	Active	Earl Grey	Vancouver	Pay Fee Due for Renewal	2022-06-01

Paying by Credit Card / Interac Online

 [Main Menu](#)

Please select a payment method. To pay by Credit Card or Interac Debit select "Pay with Credit Card" below.

Payment Options

Amount to be charged: \$1,125.00

- ☒ Pay with Credit Card
☐ Pay with Prepaid Account
-

Submit Payment »

Prepaid Account Set-up

I want to ...

Licences

- [Complete my annual filing](#)
- [View my licence record\(s\)](#)
- [Pay for my applications](#)
- [View/Print my receipts](#)
- [View/Print my licence certificate](#)

Exams

- [Register/Manage my LLQP exams](#)
- [Confirmation of Online LLQP Exams](#)
- [View my exam confirmation letter](#)
- [View my exam results](#)
- [View/Print my receipts](#)

Contact Information

- [Update my portal login information](#)
- [Change my password](#)
- [Update my contact information](#)

For Corporations/Insurers/Direct Writers

Corporate Licences

- [List and manage bulk filing payments](#)
- [Manage Prepaid Accounts](#)
- [Manage Authorizations to Represent \(ATR\)](#)
- [Manage delegates](#)
- [Verify Employee Applications](#)
- [Verify Electronic Funds Transfer Payments](#)

Insurers/Direct Writers

- [Pay my annual fee](#)
- [Manage Authorizations to Represent \(ATR\) - Direct Writers](#)
- [List and manage bulk filing payment](#)

Prepaid Account Set-up

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Prepaid Accounts

The Insurance Council's finance team will need to set up a prepaid account before you can use this option. Please send an email to accounting@insurancecouncilofbc.com and include the following information:

- Agency or firm's legal name
- Corporate licence number
- Contact Information

Please allow up to three business days for us to process your request and you will receive email confirmation when you can return to the online portal to add funds via credit card. Adding funds with EFT or cheque must be coordinated with the Insurance Council's finance team.

Adding Funds to a Prepaid Account

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Prepaid Accounts

[Download/export selected](#)

Quick Search

☐	Account ID	Balance	Status	Action
☐	164955	\$3,875.00	Active	Deposit

Adding Funds to a Prepaid Account

 Main Menu

Payment Items (0) Logout

To pay by credit card or Interac Debit, select “Pay with Credit Card below.”

To pay by EFT or by cheque, please contact the Insurance Council’s finance team at accounting@insurancecouncilofbc.com

* indicates a required field.

Payment Options

Account ID:
164955

* Amount:

5000.00

☒ Pay with Credit Card

Submit Payment »

Using a Prepaid Account

 [Main Menu](#)

Please select a payment method. To pay by Credit Card or Interac Debit select "Pay with Credit Card" below.

Payment Options

Amount to be charged: \$1,125.00

- ☐ Pay with Credit Card
☒ Pay with Prepaid Account

Select Prepaid Account

☒ 164955

Prepaid Account: 164955
Amount Available: \$5,000.00

Submit Payment »

Payment Confirmation

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Your payment has been successfully submitted.

Please print your receipt and retain a copy for your records.

[Print/View Receipt](#)

Prepaid Account Transaction History

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Prepaid Accounts

Download/export selected

Quick Search

☐	Account ID	Balance	Status	Action
☐	164955	\$3,875.00	Active	Deposit

Transactions

Download/export selected

From: yyyy-mm-dd



To: yyyy-mm-dd



Filter Dates

Quick Search

☐	Trans ID	Trans Type	Payment Method	Trans Amount	Trans Date	Receipt Number	Record ID	Full Name
☐	101	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:14 PM	148156	FIL-2021-00059	Jasmine Green
☐	100	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:14 PM	148156	FIL-2021-00058	Dar Jeeling
☐	99	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:13 PM	148156	FIL-2021-00057	Orange Pekoe Orange Pekoe
☐	98	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:13 PM	148156	FIL-2021-00055	Lady Grey
☐	97	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:12 PM	148156	FIL-2021-00053	Earl Grey Earl Grey
☐	96	DEPOSIT	EFT	\$5,000.00	3/9/2021 2:20:58 PM	148155		

Confirming Renewal Completion

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Payment Items (0) Logout

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Download/export selected | Add to Payment Items

Quick Search

☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2022-0032901-R01	General Licence - Individual	Active	Orange Pekoe	Vancouver		2023-06-01
☐	LIC-2022-0032900-R01	General Licence - Individual	Active	Dar Jeeling	Vancouver		2023-06-01
☐	LIC-2022-0032899-R01	General Licence - Individual	Active	Lady Grey	Vancouver		2023-06-01
☐	LIC-2022-0032898-R01	General Licence - Individual	Active	Jasmine Green	Vancouver		2023-06-01
☐	LIC-2022-0032895-R01	General License - Corporate	Active	A Cup of Tea Insurance Agency Ltd.	Vancouver		2023-06-01
☐	LIC-2022-0032894-R01	General Licence - Individual	Active	Earl Grey	Vancouver		2023-06-01

Annual Licence Renewal Questions



Declaration Questions?

For practice-related inquiries:

Call us:

604-695-2008 (or toll free at 1-877-688-0321)
and press 3

Email us:

practice@insurancecouncilofbc.com



An employee not displaying on the corporate portal?

For ATR-related inquiries:

Call us:

604-695-2007 (or toll free at 1-877-688-0321)
and press 2

Email us:

licensing@insurancecouncilofbc.com



Any other questions?

For portal-related inquiries:

Call us:

604-688-0321 (or toll free at 1-877-688-0321)
and press 6 for portal support

Email us: portal@insurancecouncilofbc.com



Let's Work Together



- Get started early! We're here to help.
- Don't hesitate to use the *I've forgotten my password* button. A portal account will lock after 10 incorrect password attempts and we will need to unlock it.
- We recommend using a personal email for your portal account, but your work email in your contact information.
- Every licensee already has a portal account and does not need to register for a new one.



Questions?

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BRITISH COLUMBIA

