Insurance Council
BRITISH COLUMBIA

# Annual Licence Renewal

## Bulk Payments

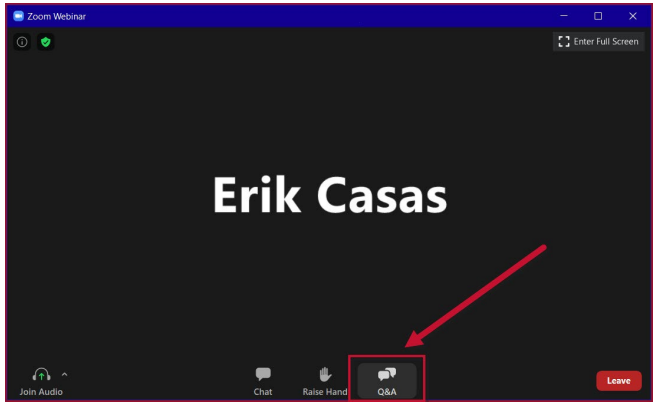
March 2022

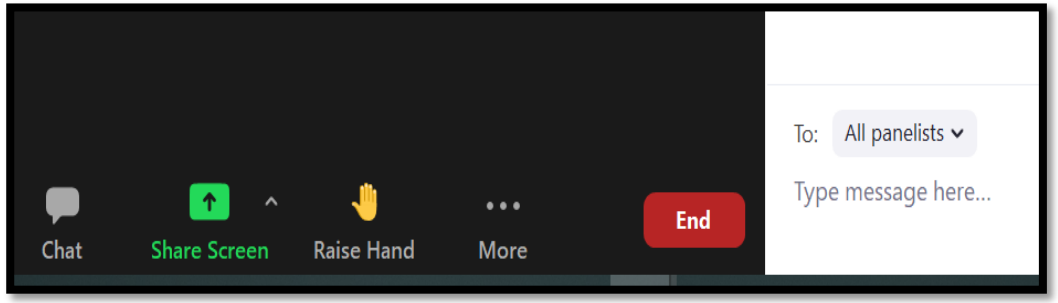
Melissa Radic
Manager, Administrative Services



# 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



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# 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

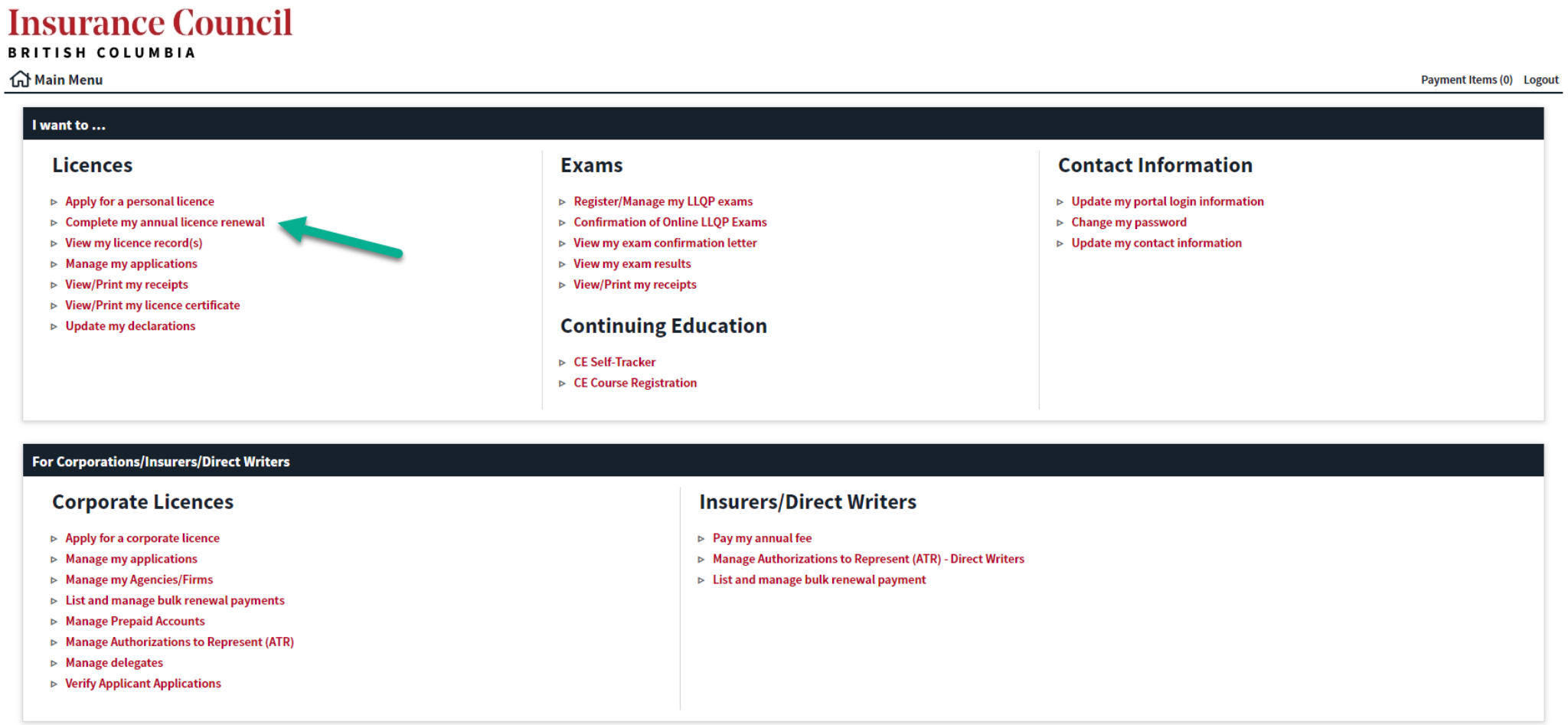
- **Where to submit the declaration and fee?**
  - All annual licence renewal declarations and fees are submitted via the online portal.
- **Why is annual licence renewal required?**
  - It is a requirement under Council Rule 4(4) for continuous licensing.
  - Licences will be automatically terminated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

# Individual Licence Renewal Step-by-Step



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# Main Menu


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Main Menu
Payment Items (0)
Logout
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

# 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:

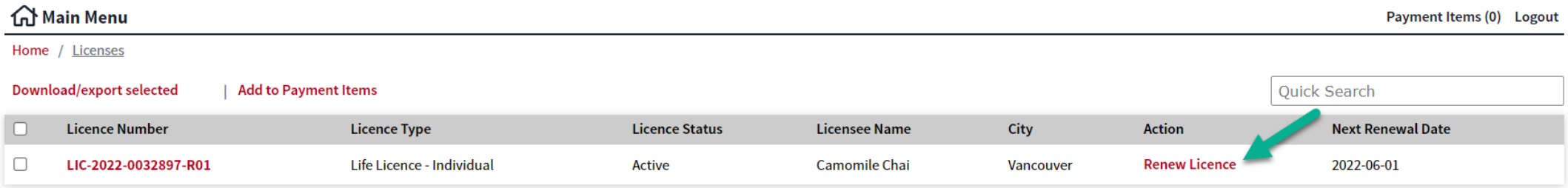
1. Review your contact information and update it, if necessary. The Insurance Council sends important communications to licensees by email; consider adding a second email address to your account and ensure you are receiving Insurance Council communications.
2. Review your authority to represent information, 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.

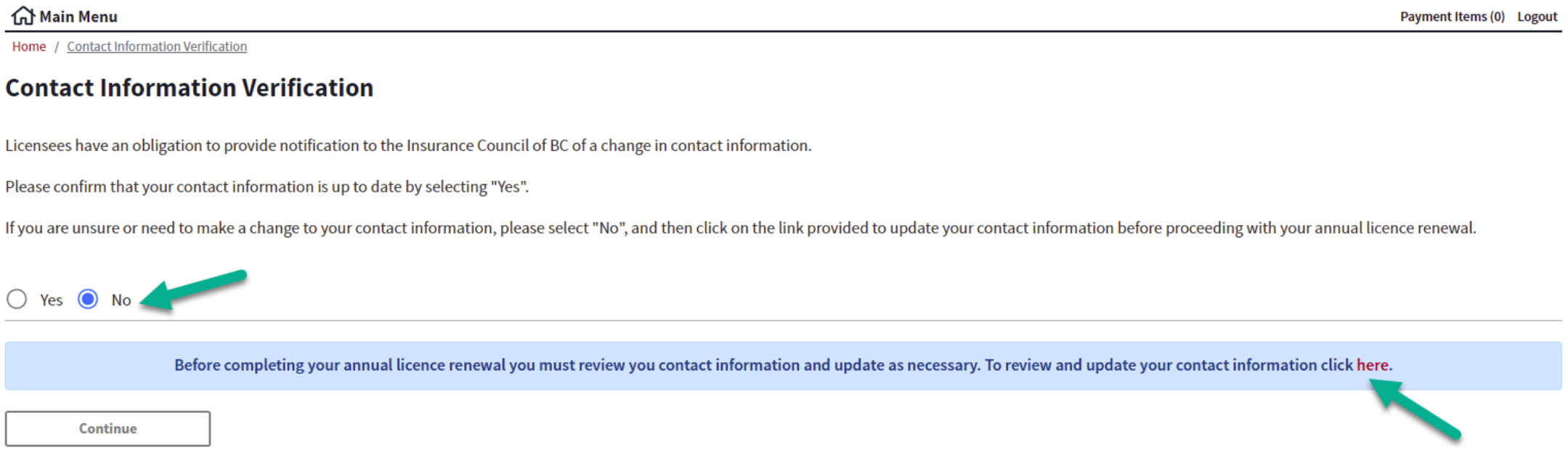
See our 2022 Annual Licence Renewal Page for detailed instructions and more information.



# Step 1: Start Renewal Process

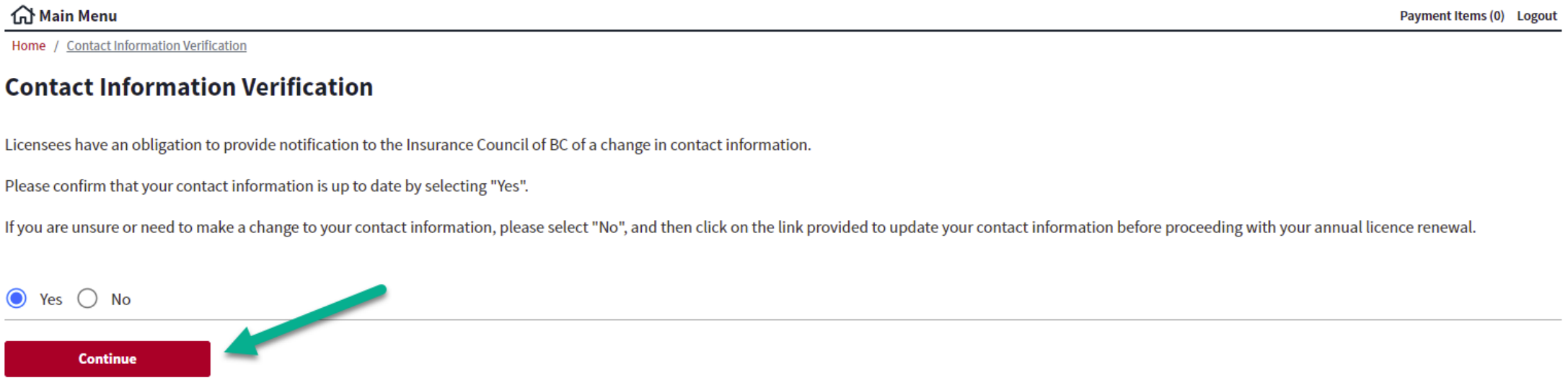


# Step 2: Review/Update Contact Information



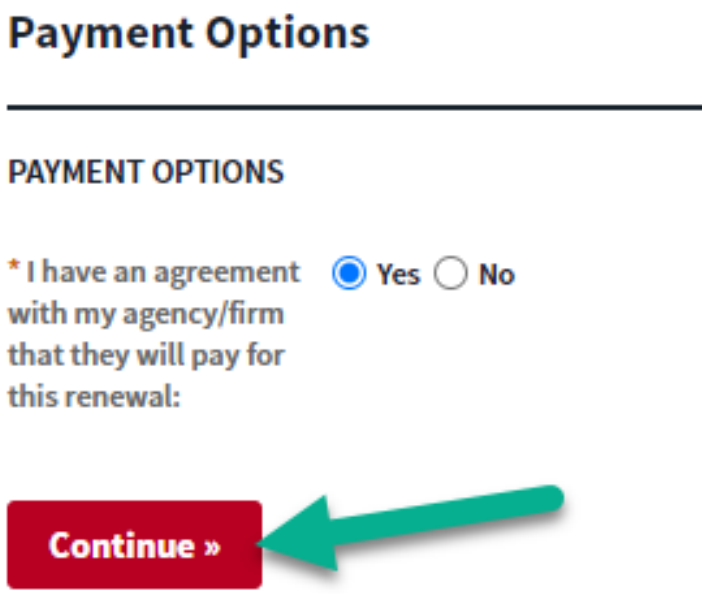

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# Step 2: Review/Update Contact Information

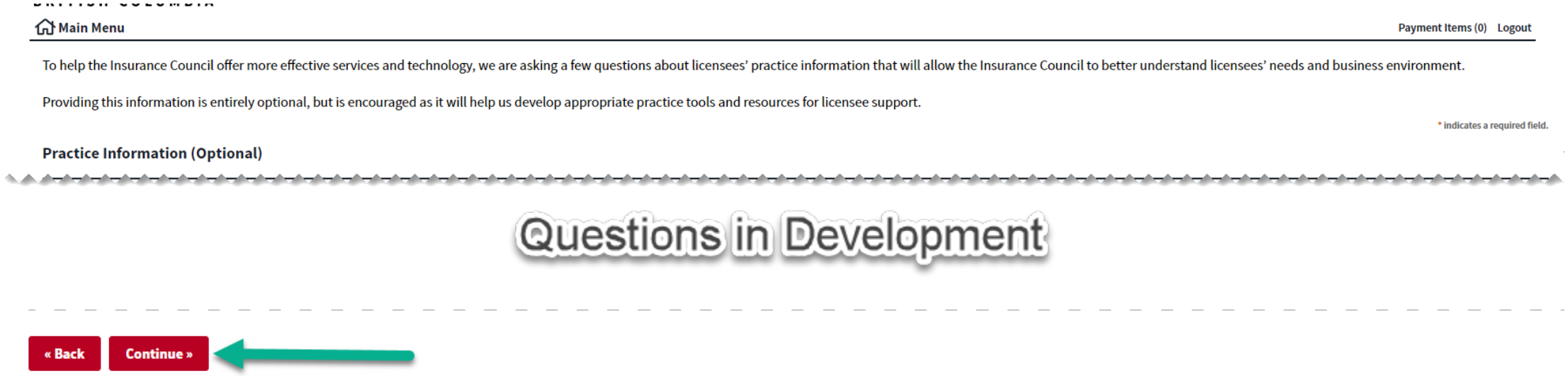



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# Step 3: Select Payment Preference



# Step 4: Practice Questions



# Step 5: Review ATR Information

Main Menu

Payment Items (0) Logout

* 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)

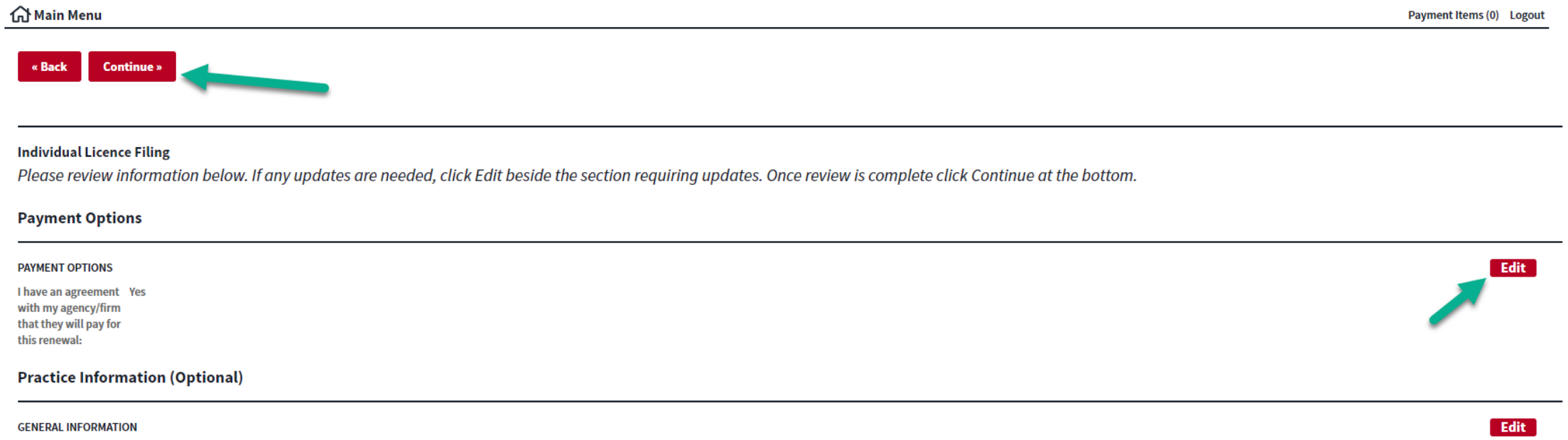



**Individual Declaration**

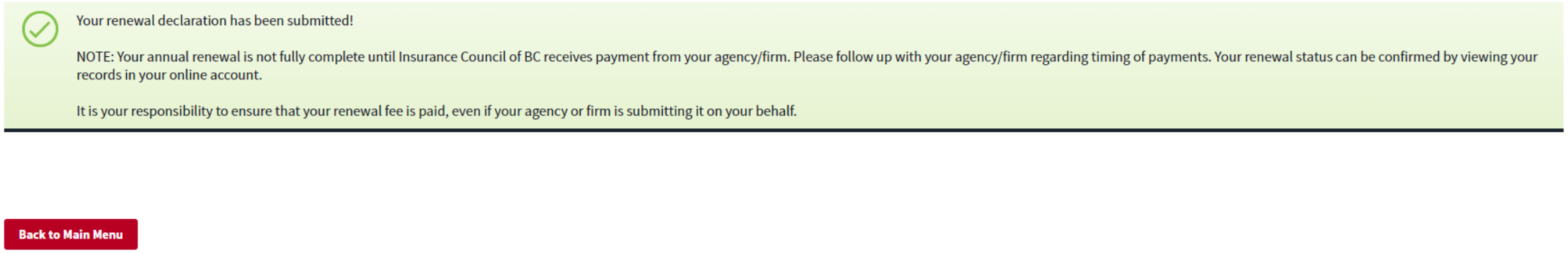
☐ I understand and am aware of my obligations under the Council Rules and the Code of Conduct

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



# Step 8: Confirmation

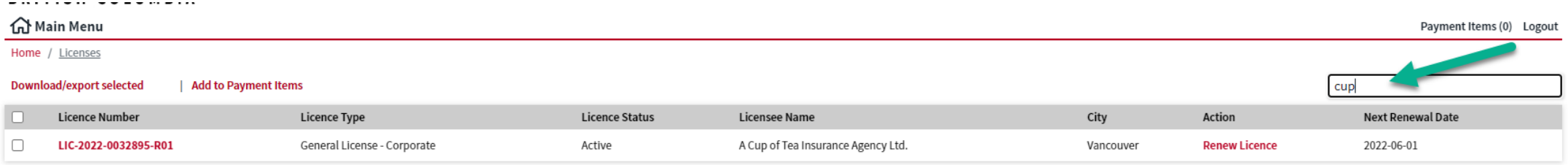


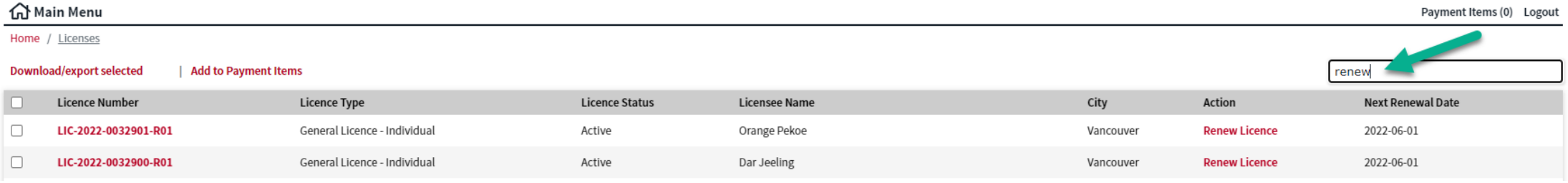
# Corporate Annual Licence Renewal Step-by-Step



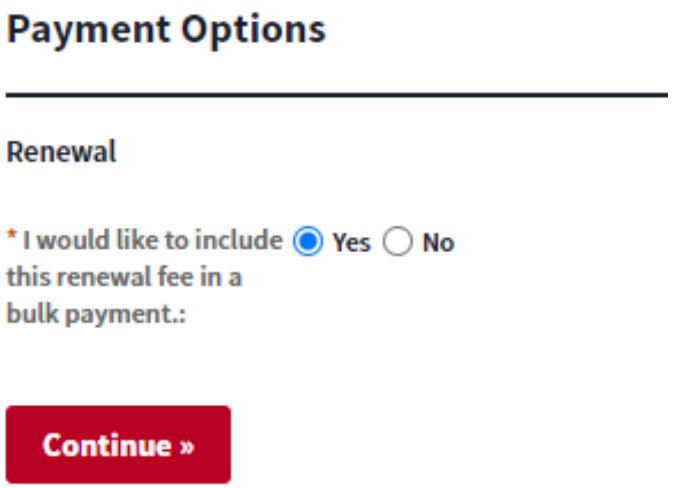
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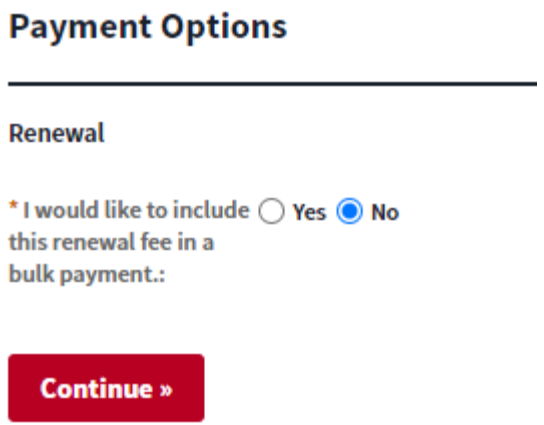
# Step 1: Start Annual Licence Renewal



# Step 2: Select Payment Preference



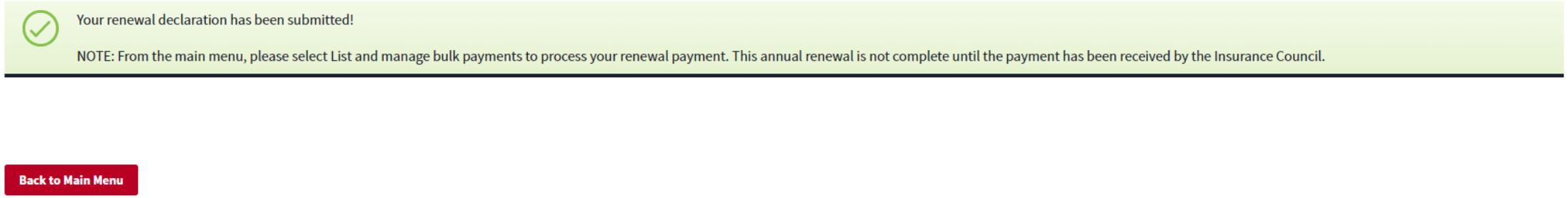

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# Step 3: Practice Questions
# Step 4: Declaration




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# Step 5: Review and Submit
# Step 6: Confirmation

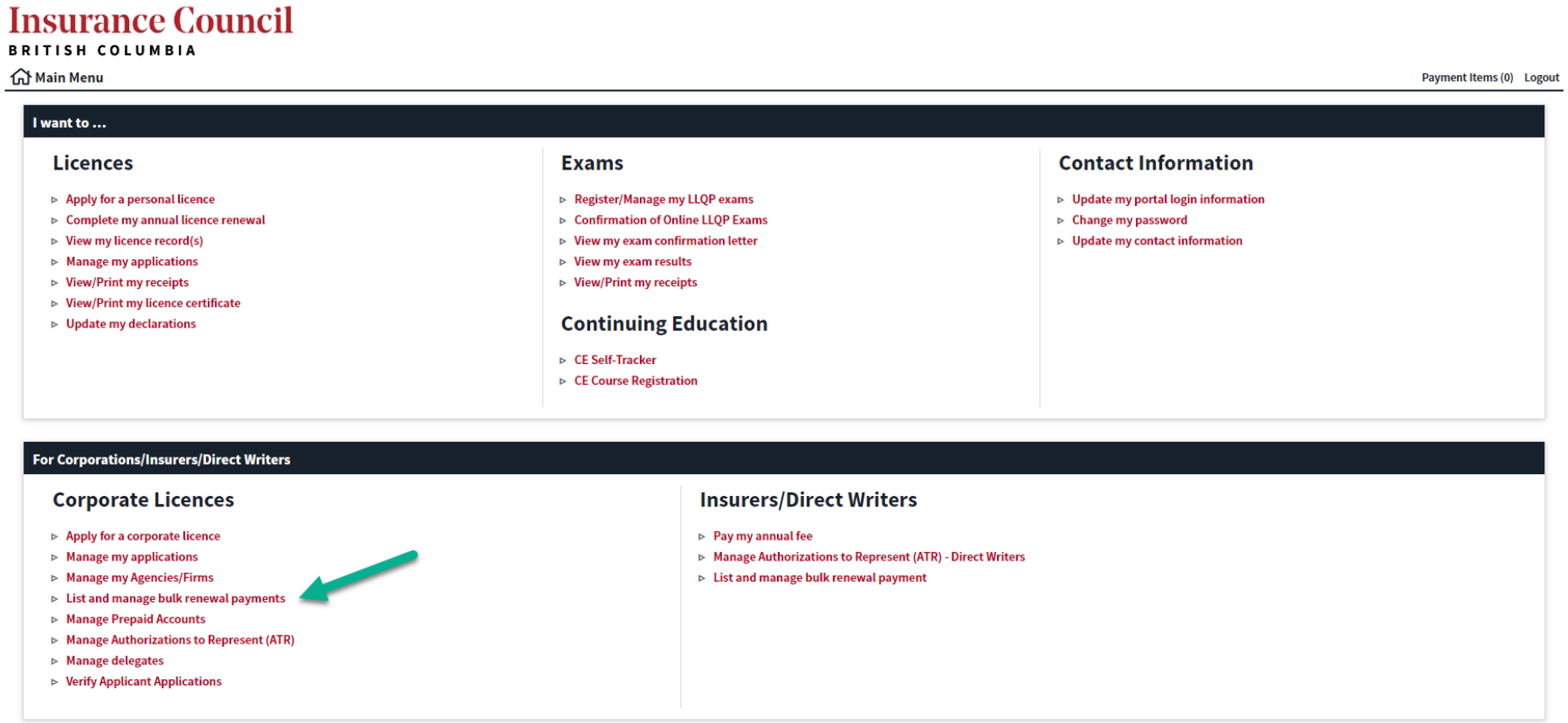


# Bulk Payments

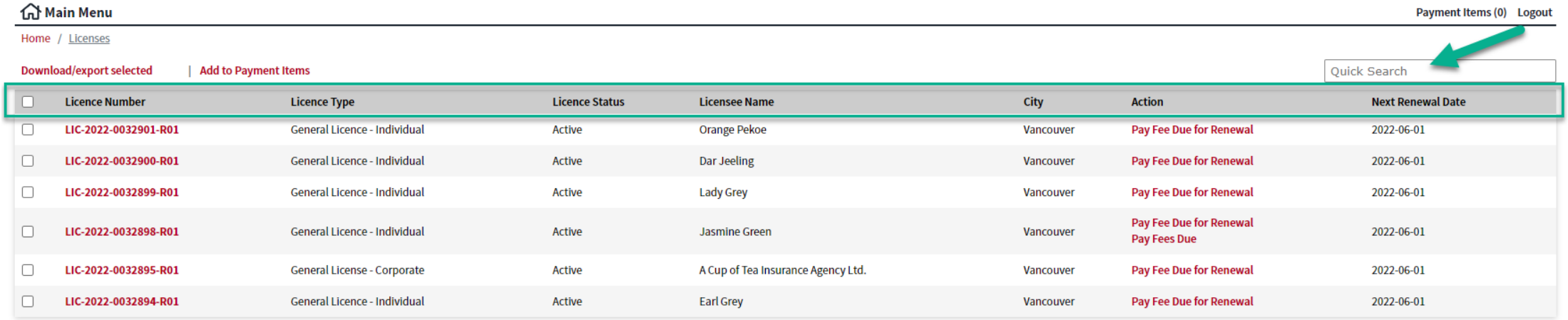


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# List and Manage Bulk Renewal Payments

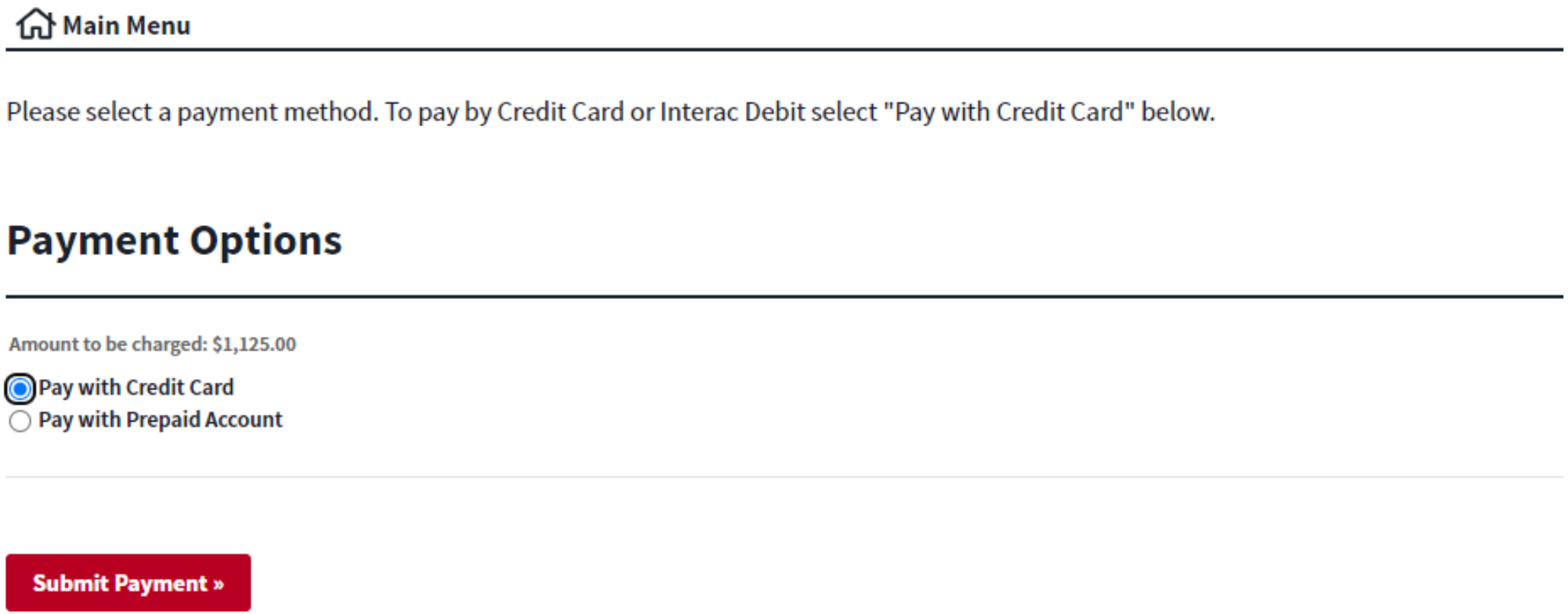


# Manipulating the List

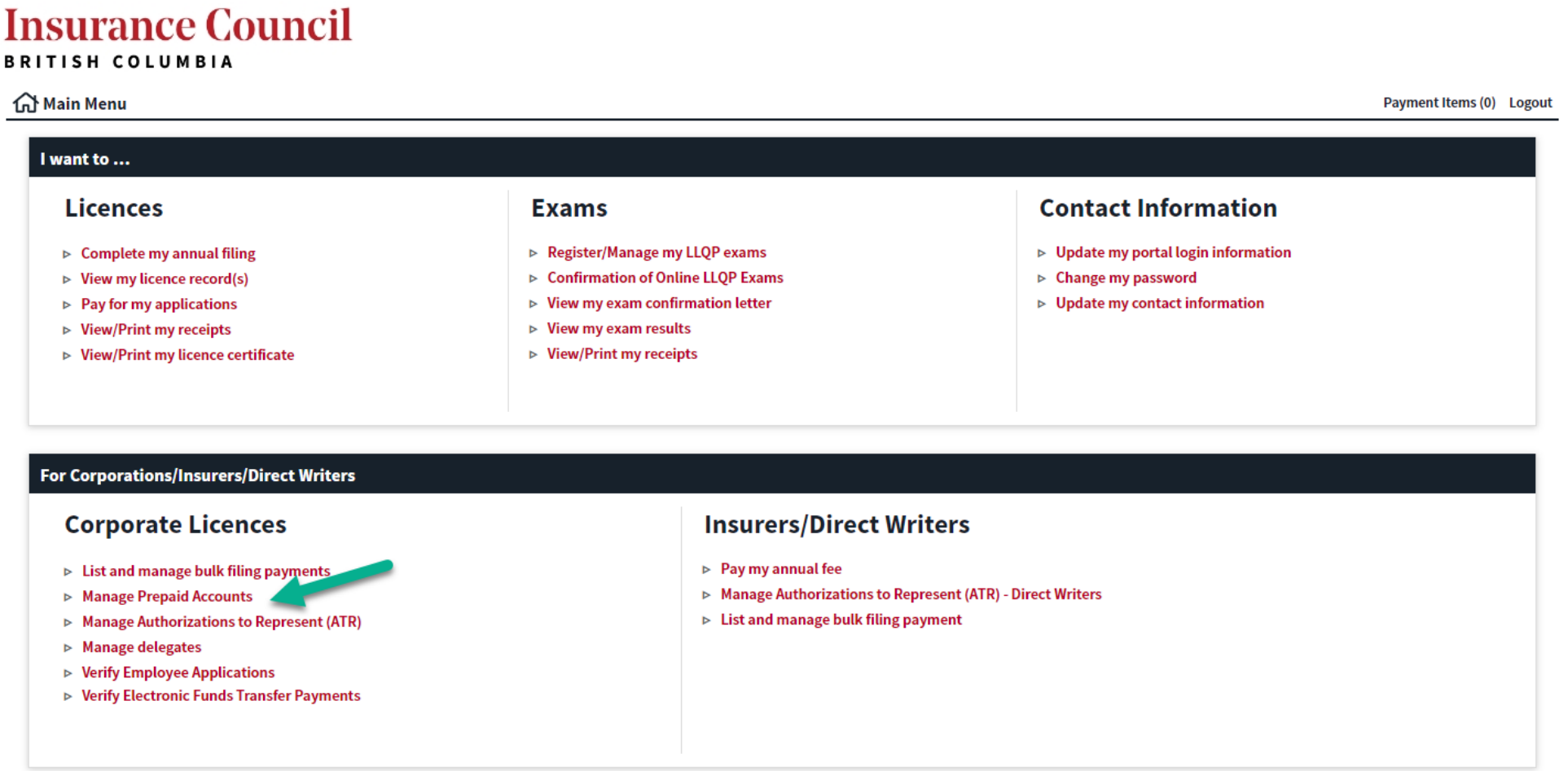



| Licence Number | Licence Type | Licence Status | Licensee Name | City | Action | Next Renewal Date |
|---|---|---|---|---|---|---|
| LIC-2022-0032901-R01 | General Licence - Individual | Active | Orange Pekoe | Vancouver | Pay Fee Due for Renewal | 2022-06-01 |
| LIC-2022-0032900-R01 | General Licence - 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<br>Pay Fees Due | 2022-06-01 |
| LIC-2022-0032895-R01 | General License - 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 |

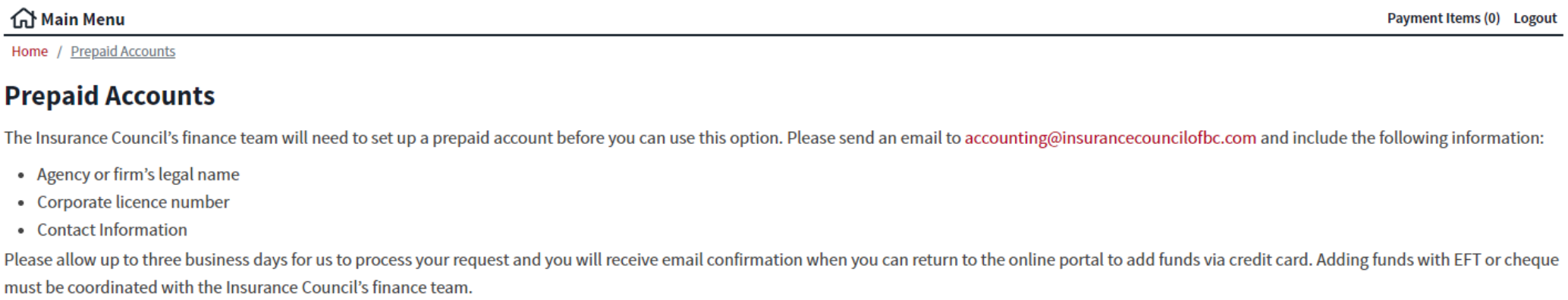
# Paying by Credit Card / Interac Online



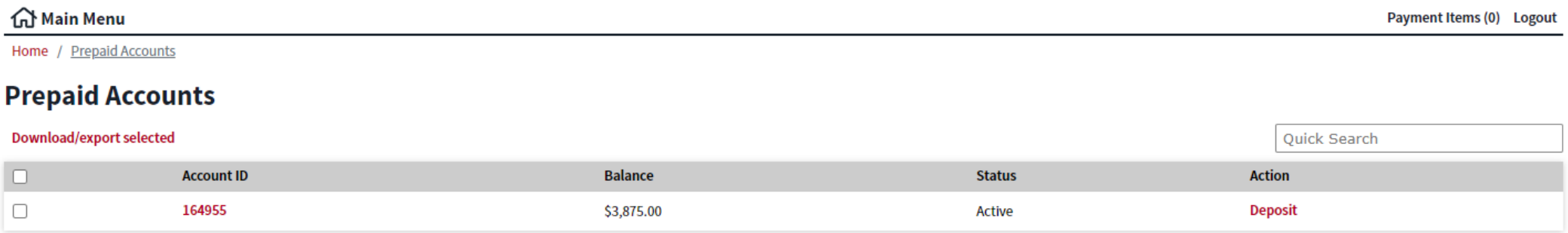
# Prepaid Account Set-up



# Prepaid Account Set-up

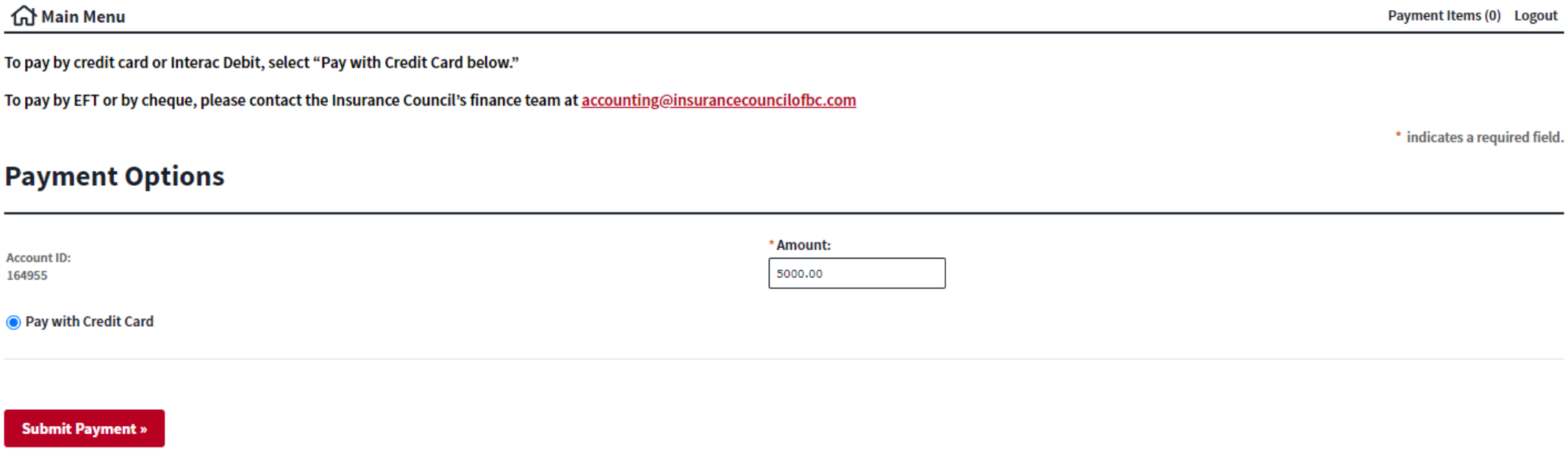


# Adding Funds to a Prepaid Account



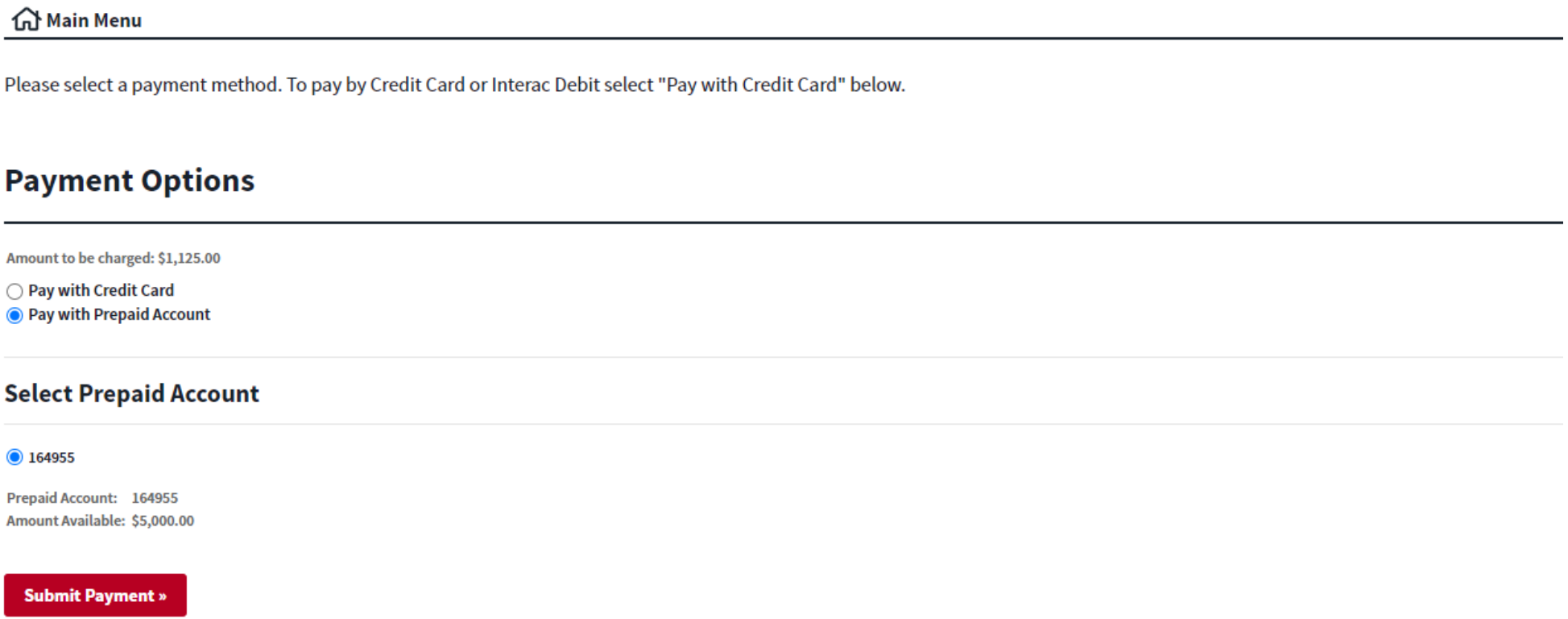

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# Adding Funds to a Prepaid Account

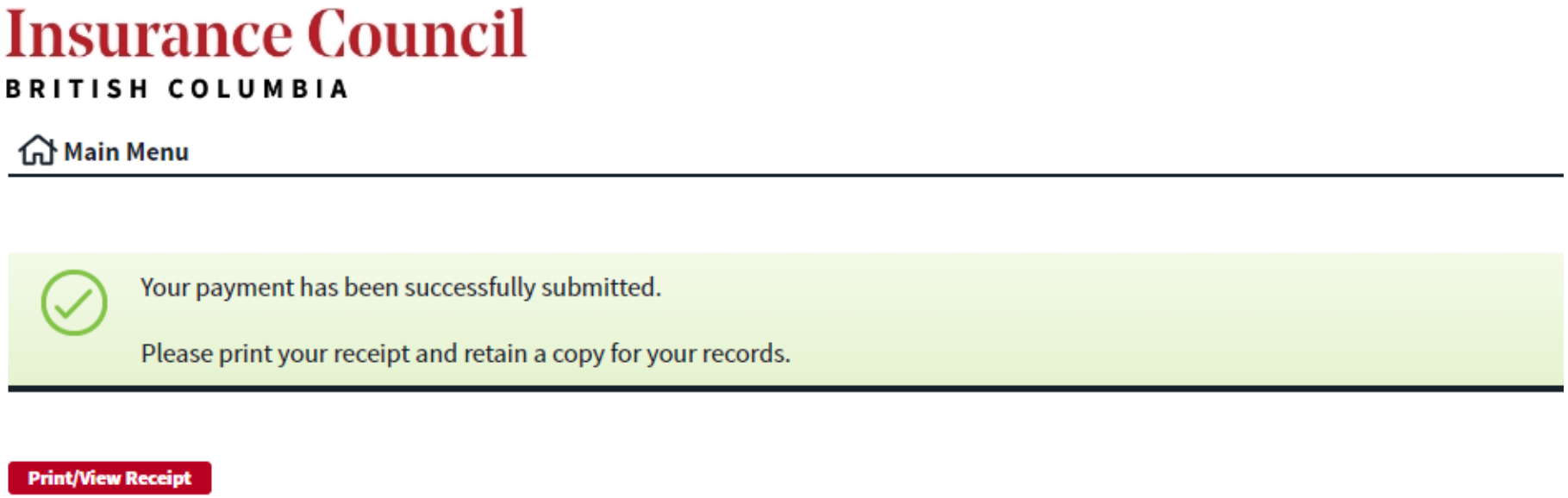



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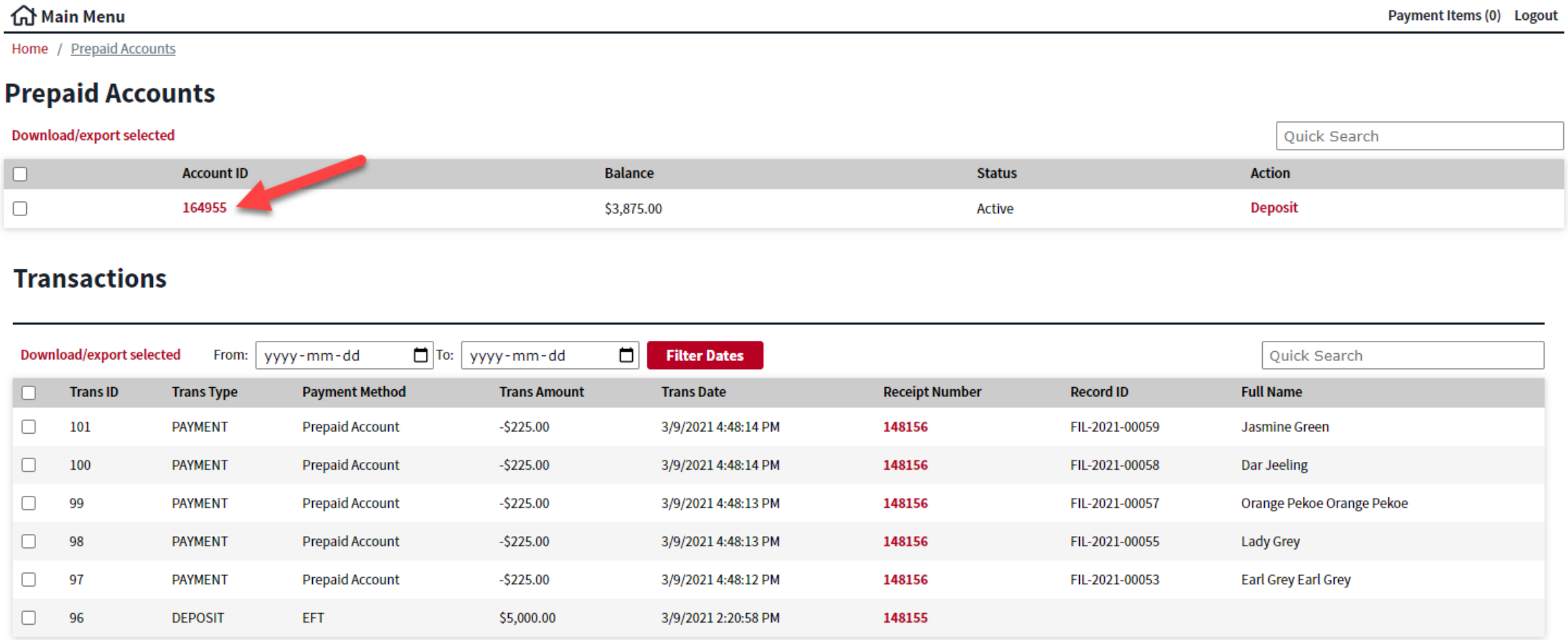
# Using a Prepaid Account



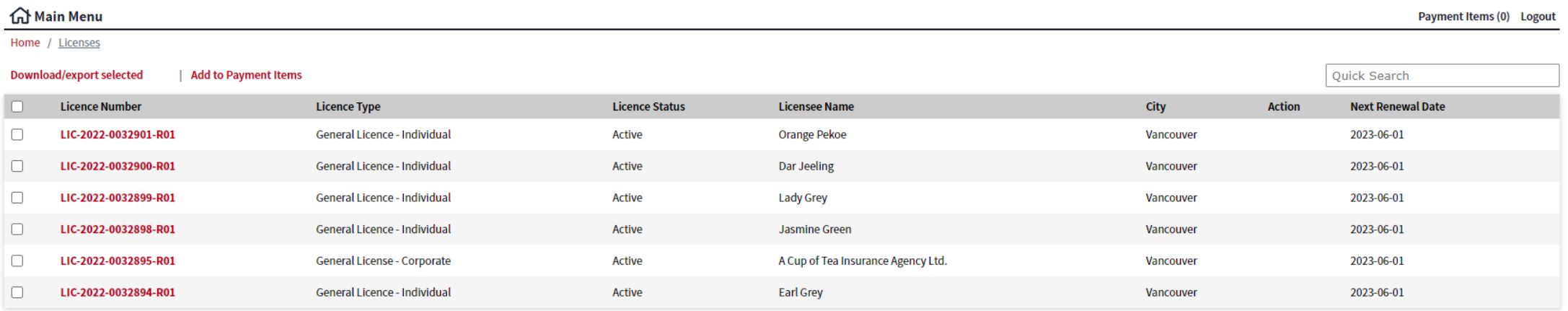
# Payment Confirmation



# Prepaid Account Transaction History



# Confirming Renewal Completion




| 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 |
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# Annual Licence Renewal Questions



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# 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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