LexisNexis® Agency Onboarding Portal
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Chapter 1

Agency Onboarding Portal Overview

The agency onboarding portal allows you to create an account profile with LexisNexis® and perform various functions.

Functions that you can perform with an account profile include:

- Log in and view account details
- Submit an application for LexisNexis services
- Revise applications for submission when necessary
- Submit applications for multiple locations with the same profile
- Add a secondary contact to represent the agency
- Add, modify, and/or delete users
- View document requests from LexisNexis
- Upload and view documents submitted to LexisNexis
- View detailed status of the onboarding process
- Allow additional users the ability to access the account profile and manage the business

About Publication

This publication contains information related to the agency onboarding process.

Conventions

LexisNexis uses conventions to provide specific information.

Cross References

Cross references link to other sections, and you can click on the cross reference to go to the referenced section.

Cross references appear in the following format:

See "Cross References" on page 5.
**Information Icons**

LexisNexis uses icons to highlight specific types of information.

- 📑 *This note icon precedes important information.*
- 🔥 *This tip icon precedes helpful information.*
- ⚠️ *This warning icon precedes information that is intended to help prevent you from negatively affecting your processes.*

**Support**

For assistance, you can contact the LexisNexis support team at 800.456.6432. Select option 1, and then option 2, to speak to a customer support representative. Representatives are available 24/7.

You can also chat with a representative using the chat link on the top right of the portal. The chat feature is available during the following times.

- Monday to Thursday - 9:00 A.M. to 6:00 P.M. Eastern Time
- Friday - 9:00 A.M. to 4:00 P.M. Eastern Time
- Saturday and Sunday - Closed
Chapter 2

User ID Creation and Authentication

To access the agency onboarding portal, you must create a user ID and password.

Procedure:

   The New User page is displayed.

2. Populate the required fields, and click Submit.
   You will receive two auto-generated emails from donotreply@lexisnexis.com, one with your user ID information and the other with a temporary password. Ensure that you add this email address to your safe senders' list.

   If your user ID already exists, a message is displayed asking you to sign in with your password.
3. Your email address is pre-populated. Enter the password that you received, and click **Login**.

   *The temporary password that you receive is case-sensitive.*

The New User Setup page is displayed.

**Set Up Security Options**

The New User Setup page lets you verify your contact information, select your preferred method of sign-in, review the channels to receive the LexisNexis® One Time Password (OTP), and choose a security image and description.
Verify Contact Information

In the Contact Information tab, your contact email address and phone number are pre-populated.

Verify your contact information, and click Next.

Set up Sign-in Method

You can sign in using a PIN (Personal Identification Number) and a Google Authenticator passcode, or a password.

To sign in using the PIN + Google Authenticator Passcode option, see "PIN and Google Authenticator Passcode" on page 10.
To sign in using the **Password** option, see "Password" on page 15.

**PIN and Google Authenticator Passcode**

If you choose PIN and Google Authenticator passcode as the method of sign-in, you must register your mobile device.

Procedure:

1. Select **PIN and Google Authenticator Passcode**.

2. Create a 4-digit PIN.
   Make sure that the stated PIN requirements are met. As each requirement is met, the label turns green with a green check mark next to the corresponding label.

3. Click **Register Device**.
   A pop-up window with information about Google Authenticator is displayed.

4. Click **Continue**.
   A window with a barcode is displayed.
You can register your device either by scanning the barcode or by entering the key provided on the portal.

Depending on whether your device uses the IOS platform or the Android platform, go to the following sections.

• "IOS Platform" on page 11
• "Android Platform" on page 14

5. After registering your device, click Next.

⚠️ If you opt to use Google Authenticator for sign-in, and for any reason, are unable to access the six-digit passcode on Google Authenticator, you can sign in using a password. For more information, see "Google Authenticator not Available" on page 40.

**IOS Platform**

You can register your device either by scanning the barcode or by entering the key.

*Scan Barcode*

You can register your device by scanning the barcode.
Procedure:

1. In Google Authenticator, tap 📅, and select **Scan barcode**.

   ![Google Authenticator interface](image)

   *If Google Authenticator does not have permission to access the camera on your device, a pop-up window is displayed asking you to enable camera access.*

2. Scan the barcode provided on the portal window.
   A six-digit passcode is displayed on your device.

3. On the portal window, click **Continue**.

4. Enter the six-digit Google Authenticator passcode that you see in the app, and click **Submit Code**.
   A message showing successful passcode verification is displayed.

   *If you see a message that says the Google Authenticator passcode is invalid, the passcode might be near expiration. See "Invalid Google Authenticator Passcode" on page 42 for more details.*

5. Click **Close** on the portal window.
   Your device is now registered on Google Authenticator for the Insurance Solutions portal.

**Enter Key**

You can register your device by entering the alphanumeric key.

*The alphanumeric key is long and case-sensitive, because of which there is a high probability of an error while entering. Therefore, use this option only if you are unable to scan the barcode.*
Procedure:

1. On the portal window, click **Can't scan barcode?**. A multi-character alphanumeric key is displayed.
2. In the Google Authenticator app, tap +, and select **Manual entry**.

   ![Authenticator app interface](image)

3. Enter your account name and the alphanumeric key in the spaces provided.

4. Make sure that the **Time based** toggle is turned on. Tap the check mark to save the details. A six-digit passcode is displayed on your device.
5. On the portal window, click **Continue**.
6. Enter the six-digit passcode that you see in the app, and click **Submit Code**. A message showing successful passcode verification is displayed.

   📣 If you see a message that says the passcode is invalid, the passcode might be near expiration. See "Invalid Google Authenticator Passcode" on page 42 for more details.

7. Click **Close** on the portal window. Your device is now registered on Google Authenticator for the Insurance Solutions portal.
Android Platform

You can register your device either by scanning the barcode or by entering the key.

Scan Barcode

You can register your device by scanning the barcode.

Procedure:

1. In Google Authenticator, tap , and select Scan a QR code.

   ![Scan a QR code](image)

   *If Google Authenticator does not have permission to access the camera on your device, a pop-up window is displayed asking you to enable camera access.*

2. Scan the barcode provided on the portal window.
   
   A six-digit passcode is displayed on your device.

3. On the portal window, click Continue.

4. Enter the six-digit passcode that you see in the app, and click Submit Code.

   A message showing successful passcode verification is displayed.

   *If you see a message that says the Google Authenticator passcode is invalid, the passcode might be near expiration. See "Invalid Google Authenticator Passcode" on page 42 for more details.*

5. Click Close on the portal window.

   Your device is now registered on Google Authenticator for the Insurance Solutions portal.

Enter Key

You can register your device by entering the alphanumeric key.

*The alphanumeric key is long and case-sensitive, because of which there is a high probability of an error while entering. Therefore, use this option only if you are unable to scan the QR code.*
Procedure:

1. On the portal window, click **Can't scan barcode?**. A multi-character alphanumeric key is displayed.
2. In Google Authenticator, tap !, and select **Enter a setup key**.
   
   ![Image of Google Authenticator interface]

3. Enter your account name and the alphanumeric key in the spaces provided.

   ![Image of account details entry]

4. For the type of key, select **Time based**, and click **Add**. A six-digit passcode is displayed on your device.
5. On the portal window, click **Continue**.
6. Enter the six-digit passcode that you see in the app, and click **Submit Code**. A message showing successful passcode verification is displayed.

   ![Alert message]

   *If you see a message that says the passcode is invalid, the passcode might be near expiration. See "Invalid Google Authenticator Passcode" on page 42 for more details.*

7. Click **Close** on the portal window. Your device is now registered on Google Authenticator for the Insurance Solutions portal.

**Password**

If you choose to sign in using a password, you must create a password.
Procedure:

1. **Select Password.**

![New User Setup](image)

   - Please select how you would like to sign in to the portal.
   - PIN and Google Authenticator Passcode
   - Password

2. **Create a password.**

   Make sure that the stated password requirements are met. As each requirement is met, the label turns green with a green check mark next to the corresponding label.

3. **Click Next.**

   *Once you log in, you can change your preferred method of sign-in by clicking the Account Settings or Security Settings tab on the portal header.*

**Review OTP Options**

If you forget your PIN or password, or want to reset your PIN or password, you need the OTP.

Your email address and phone number are pre-populated, and can be used to receive the OTP.

Additionally, you can receive the OTP through Google Authenticator, which is an optional channel:

- If you have previously registered your device while selecting your sign-in method, you do not need to re-register your device. Your device registration with Google Authenticator is common, regardless of the tab from which you register your device.
- If you have not previously registered your device, you can register your device by clicking **Register Device**. Follow the steps outlined in “Set Up Sign-in Method”.
Click Next.

In certain situations, it becomes necessary to re-register your device on the portal. For more information, see "Re-Register Device" on page 39.

Select Security Image and Description

Every time you sign in to the portal, your selected security image and description are displayed, which let you know that you are on the correct website.

Procedure:

1. Click Select Security Image/Description.

![New User Setup](image)

2. Select a category from the drop-down list, and select an image.
3. Enter a description for the selected image, and click Continue.
   The selected image and description are displayed in the space provided.
4. Click Save & Continue.
   A confirmation message about your security settings having been updated successfully is displayed.
   Click Continue to go to the portal.
Chapter 3

Complete New Application

In order to access our Insurance products, you must create and submit an application for service.

Set Up Location Type

You must submit an application for every location from which you need access to our products.

Procedure:

1. On the Location setup page, select Brand New Location if:
   - Your agency location does not have a relationship with LexisNexis®
   - Your agency location has undergone an ownership/entity change
   - You need to submit an application for an additional location

If you select Other, the contact information for the LexisNexis Support team will be displayed. Contact the team for assistance on how to proceed.
2. When you select **Brand New Location**, your user information is pre-populated in the Contacts pane on the right.

If there are no users in the left pane, you are the only user on the account.

Select your information, and click **Next**.

3. Verify your contact information, and click **Confirm**.

At this point, you have the option to save your application and resume the process at a later time.
Enter Agency Details

All sections related to agency details are displayed by default. You can navigate to the specific section by clicking the appropriate tab.

*In each section, required fields have an asterisk next to the field name.*

It is recommended that you have the following information ready, before you proceed:

- Principal of the agency - first name, last name and email address
- Agency information - name, physical address, phone number, and FEIN (Federal Employer Identification Number) or SSN (Social Security number), if FEIN is not available
- Secondary contact person and/or additional users for the agency - first name, last name, phone number and email address
- IP address of the device from which you will be accessing data
- Witness information - first name, last name, title, email address, phone number and fax number
  The witness must be physically present with you when you sign and submit the application.
- Sponsoring insurance carrier(s) and agency ID assigned to you by those carriers
Agency Primary Contact

The primary contact refers to the principal of the agency, or a person authorized to sign legal documents on behalf of the agency.

*For security purposes, mother’s maiden name is required.*

![Agency Primary Contact form](image)

Agency Information

Agency information refers to official company details such as legal entity name and physical address.

Enter DBA (doing business as) or AKA (also known as), if applicable, and the FEIN.
If your billing address is different from the physical address, expand the Billing Address tab to enter the billing address details. Billing address is required for non-sponsored or agency-billed accounts.

**Agency Contacts**

Agency contacts are secondary contact persons and/or additional users for your account.

The primary contact information is pre-populated. You can add a secondary contact and/or additional users by clicking +.
LexisNexis may contact the secondary contact person to verify application information during the onboarding and verification process. For individuals who have the authority to verify your agency information, select **Yes** in the **Secondary contact?** field.

For individuals who do not have the authority to verify your agency information, select **No**.

For every additional user added, LexisNexis creates a user ID. Each employee is required to be set up with their own user ID.

**IP Address**

For security purposes, you must add an IP address for each physical location from which you access LexisNexis data.

To obtain your IP address, click the **what is my IP?** link. The IP address information is displayed in a separate tab of your browser. Enter this information in the **Start IP Address** field.

If you do not have an IP address range assigned to you, leave the **End IP Address** field blank. To add additional IP addresses, click **+**.
Witness Information

Witness information should be completed by a person other than the one creating the application.

![Witness Information Form]

Sponsors

Sponsors are the insurance carriers who sponsor your agency.

From the drop-down list, select the insurance carriers who will be sponsoring your agency. You can click ![+] to add additional sponsors. It is important that you select the appropriate carrier(s) with whom you conduct business, to ensure your application is processed accordingly.

In the Agency ID code field, enter the unique identifier assigned to your agency by the insurance carrier. If you do not have the agency ID code, enter NONE.

⚠️ If your sponsor is not mentioned in the drop-down list, contact the Customer Support team at 800.456.6432, or use the chat feature to chat with a customer support representative.

![Sponsors Form]

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Comments

Comments can include details that may assist in onboarding your agency in a timely manner, such as the reason for submitting an application, ownership change, entity change, or a new location.

After entering the required information in all the agency details sections, save the information.

A message is displayed, indicating that your information has been saved.

⚠️ Review your information for accuracy.

At this point, you have the option to continue your application at a later time.

Once you have saved your information, click Generate Contract to proceed to submit the application.
Review and Sign Documents

You must review and electronically sign the documents, after which you can submit the created application.

Procedure:

1. On the **Documents** tab, click **Please review documents**.

A list of documents to be reviewed is displayed.

Click each highlighted document to view it in a separate tab.

After reviewing, you can close the browser tab or click the previous tab to view other documents.
It is recommended that you retain a hard copy or an electronic copy of the application.

2. After reviewing all documents, check the box next to each document, including the Agreement for Service, state affidavits and user ID requests form(s). Click Sign.

You must sign all documents regardless of where your agency is located or for which state(s) you will be ordering reports.
3. Check the box to agree to the terms and conditions, and click **Submit Application**.

A confirmation page is displayed.

You can click **View** to view your application. You can click the Documents Reviewed date or the Submitted On date to view the electronically signed contract documents.
You cannot make changes at this time.

Click **Cancel** to go back to the previous screen.

When you click the Documents Reviewed date or the Submitted On date to view the electronically signed contract documents, you can click the arrows or click **Expand/Collapse** to view the list of documents.
Chapter 4

Account Management

The portal allows you to view account details and manage your account.

You can perform the following tasks:

- Modify Application
- Submit Documents
- Add Location
- Check Application Status

Each of the above tasks is a link to the specific section.

Before you begin, log in to the Insurance Solutions portal by going to https://insurancesolutions.lexisnexis.com/idslogin/.

Enter your user ID, and click Sign In.

If you do not recognize your security image, there may be a problem with your user ID. Contact the Customer Support team either at 800.456.6432 or through the chat functionality.

If you previously selected Password as your preferred method of sign-in, the system might not recognize your location. In that case, you will see a screen asking you to select an option to receive the LexisNexis® One Time Password (OTP). Select an option, and click Send Passcode. Enter the passcode that you receive, and click Verify Passcode.
Submit Documents

If LexisNexis® needs business documents from your agency, you will receive an email indicating that a request has been made via the agency onboarding portal.

Procedure:

1. When you log in to the portal, a flashing number is displayed on the Requests tab.

Along with the submitted application, you can see the following information related to your request.

Request-related Information

<table>
<thead>
<tr>
<th>Data Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup request status</td>
<td>Status of the request</td>
</tr>
</tbody>
</table>
| @Agency node     | A temporary reference number  
|                  | This number is converted to a J-node when your application is approved after onboarding and verification. |
| Credentialing status | Indicates status, with comments about what is pending to continue the verification process |
| Sponsor status   | Pending or Active status, with the carrier’s name                            |

2. Click the Requests tab to view the request details. Click Please accept request! to view the pending documents to submit.
3. View the list of pending documents to submit, and click **Accept**.

![Providing Additional Documentation](image)

4. On the Providing Additional Documentation page, click **Choose File** to upload the document from your computer. Note the acceptable document formats that can be uploaded.

   The document that you uploaded is displayed.

   **Click Expand if You have Any Additional Document Comments** to add any notes or details that LexisNexis may need to complete your request (such as landlord contact information).

![Providing Additional Documentation](image)

5. In the Specify Document Type for the File You are Uploading section, click the document name.

   The document name is highlighted in blue.
A message is displayed asking you to confirm the file format and document type. Click **Confirm**.

6. Click **Submit Documents**.

A confirmation message is displayed indicating that you will not be able to make changes after submission.

7. Click **Confirm**.

The **Documents** tab displays the document that you uploaded.

You can click the document icon or the dates to view details.
Modify Application

In the event that you need to modify information on your application, you will receive an email request from LexisNexis via the agency onboarding portal.

Procedure:

1. After you log in to the portal, click the flashing Requests tab.

2. Click the highlighted text to accept the request.

When you accept the request, the system displays the last application that was submitted with the contract ID and date. If you have submitted multiple applications, you can use the drop-down list to select the application that you want to modify.
3. Select the application that you want to modify, and click **Accept**. The original application is displayed.

4. Make the necessary changes, and click **Save**.

Click **Generate Contract** to create new documents for you to review, sign, acknowledge and submit. The modified application is now available under the **Documents** tab.
Add Location

You must submit an application for every location from which you need access to our products.

Procedure:

1. After you log in to the portal, on the dashboard, click Add New Location.

![Dashboard screen showing how to add a new location](image)

2. On the Location Setup Wizard page, select Brand New Location, and click Next.

![Location setup wizard step 1](image)

3. From the drop-down list, choose whether you want to clone an existing application or leave the contract blank.

   You will be able to modify a cloned application.
4. Select the user(s) that you want to add to the contract, and add the user to the Contacts pane on the right.

Click **Next**.

5. Continue creating the application by following the steps detailed in "Complete New Application" on page 18. Once you submit the application, you can view it on the dashboard.
Check Application Status

You can check the status of your application by logging in to the Insurance Solutions portal. On the dashboard, the agency information appears on the left pane.

![Dashboard Image]

When you select an agency location in the customer hierarchy, the status information is displayed on the right pane. You can expand the customer hierarchy information by clicking on the arrows or by clicking [+ All], to view the node ID, users, documents, requests, accounts and contacts.

After approval, the agency information appears as shown in the following image.

![After Approval Image]
Appendix A

Google Authenticator Use Cases

If you use Google Authenticator as your preferred method of sign-in or to receive the LexisNexis® One Time Password (OTP), you might encounter specific scenarios such as having to re-register your device, Google Authenticator not being available, or an invalid passcode.

Re-Register Device

In certain situations, it becomes necessary to re-register your device on Google Authenticator for the portal. Reasons to re-register include changing your device, uninstalling and re-installing the app, or accidentally deleting the app.

Before you begin this task:
Log in to the portal.

⚠️ You can have only one device registered on Google Authenticator for the portal. A new registration automatically voids the previous registration.

Procedure:

1. On the portal header, click Security Settings or Account Settings.
   - If you previously selected PIN and Google Authenticator Passcode as your sign-in method, you can re-register your device through the PIN or Password tab.
   - If you previously used Google Authenticator only to receive the OTP, you can re-register your device through the One Time Passcode tab.

   Navigate to the appropriate tab.

2. Click Re-Register Device. On the confirmation window, click Continue.
3. If you are using your original device, there might be an existing registration on Google Authenticator. Delete the existing registration by following these sub-steps. If you are using a different device with no existing registration, proceed to step 4.

⚠️ Once you delete the existing registration, the passcode from that registration becomes invalid, and will no longer work.

💡 Failure to delete the existing registration before re-registering, might result in two registrations showing up on your mobile device, which might be confusing. Therefore, it is recommended that you first delete the existing registration before re-registering.

- **IOS platform:**
  - a. In Google Authenticator, click 📋.  
    ![Google Authenticator](image)
    Insurance Solutions
    791 787
  - b. Select the Insurance Solutions entry, and tap **Delete**. Provide the confirmation to delete the existing registration.

- **Android platform:**
  - a. In Google Authenticator, tap and hold the existing registration for a few seconds.
    ![Google Authenticator](image)
    Insurance Solutions
    675 986
  - b. Tap 📋. Provide the confirmation to delete the existing registration.

4. Continue to register your device by following the steps outlined in “Set Up Sign-in Method”.

### Google Authenticator not Available

If you use Google Authenticator, and for any reason, are unable to access the six-digit passcode on Google Authenticator, you can use a password to sign in.

If you have not created a password, follow the steps outlined in this section.

If you have previously created a password, you can log in using the **Sign In using Password** option on the Sign In page.
Once you log in, you can change your preferred method of sign-in by clicking the **Account Settings** or **Security Settings** tab on the portal header.

**Procedure:**

1. On the Login page of the portal, enter your user ID, and click **Continue**. The Sign In screen is displayed with the option to enter your PIN (Personal Identification Number) and passcode.

2. Verify the security image and description, and click **Do not have access to Google Authenticator?**. The Forgot Password page is displayed.

3. Select your option to receive the OTP by clicking **Send OTP**. Enter your recovery email address or phone number, and click **Send OTP**.

4. Enter the OTP that you receive, and click **Verify OTP**. A screen is displayed prompting you to create a new password.

5. Create a new password, re-enter the password, and click **Save Password**. The Sign In page is displayed.
6. Click **Sign In using Password**.
7. Enter the password that you created, and click **Sign In**.
   You are now successfully logged in.

**Invalid Google Authenticator Passcode**

If the portal shows the six-digit Google Authenticator passcode as invalid, it could be because the passcode is near expiration.

Since the passcode in Google Authenticator is time-based and changes every 30 seconds, make sure that you enter the passcode when the numbers are blue, and not red. If the numbers are red, wait a few seconds until they turn blue, and then enter the passcode.

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