



# LexisNexis<sup>®</sup> 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

This publication uses various conventions to provide specific information. These conventions are described in the following sections.

### Cross-References

Cross-references link to other sections, and you can click 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® Risk Solutions 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

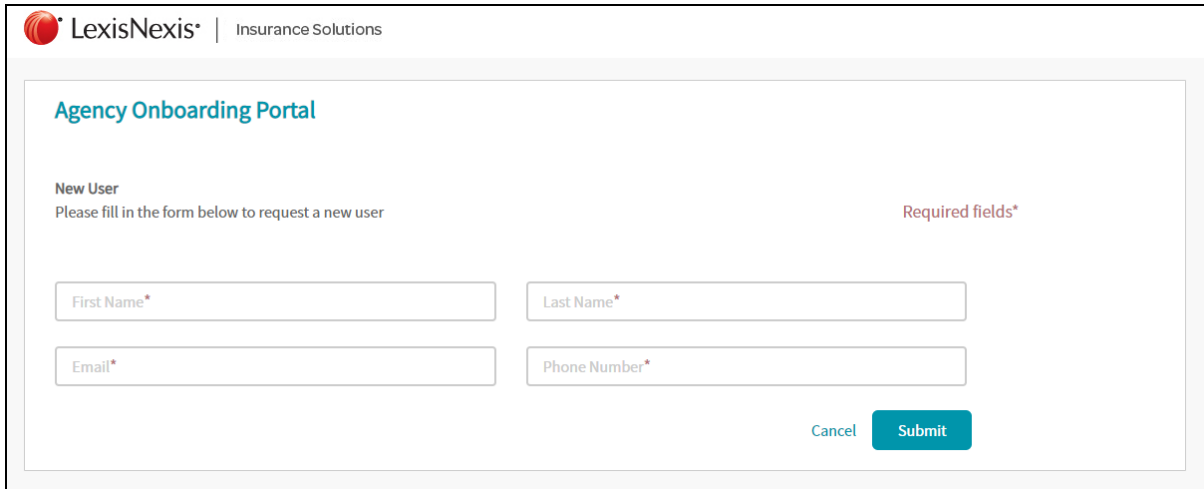
# User ID Creation and Authentication

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

### Procedure:

1. Go to <https://insurancesolutions.lexisnexisrisk.com/idslogin/newagent/>.

The New User page is displayed.



The screenshot shows the 'Agency Onboarding Portal' interface. At the top left, there is the LexisNexis logo and the text 'Insurance Solutions'. The main heading is 'Agency Onboarding Portal'. Below this, the section is titled 'New User' with the instruction 'Please fill in the form below to request a new user'. To the right of this instruction, the text 'Required fields\*' is displayed in red. The form contains four input fields: 'First Name\*', 'Last Name\*', 'Email\*', and 'Phone Number\*'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Submit'.

2. Populate the required fields, and click **Submit**.

You will receive two auto-generated emails from [donotreply@lexisnexisrisk.com](mailto:donotreply@lexisnexisrisk.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.

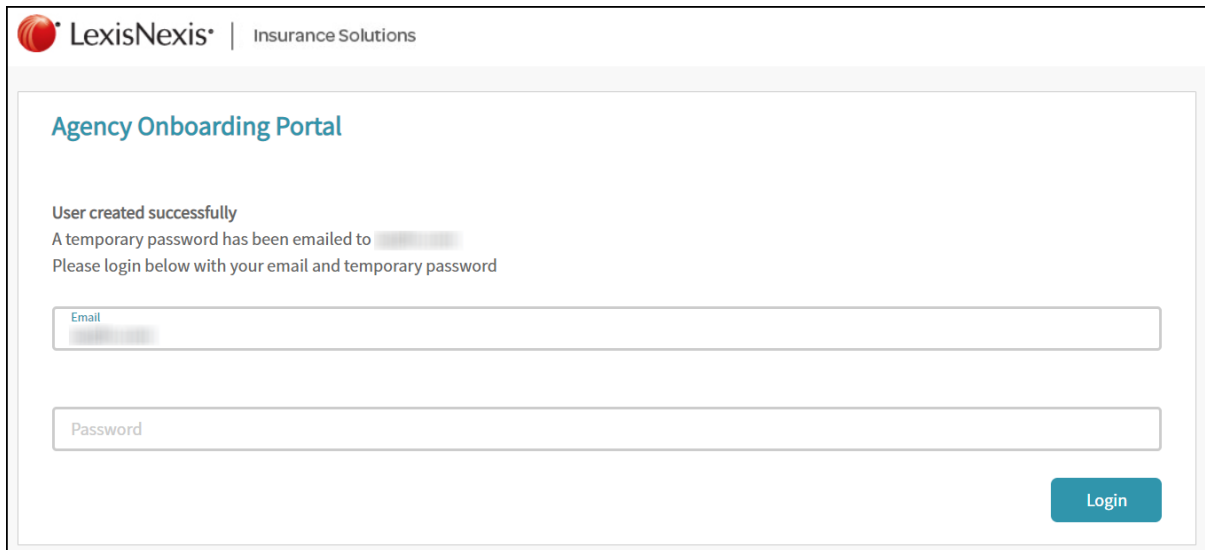


*If your user ID already exists, a message is displayed asking you to sign in with your password.*

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.*



LexisNexis® | Insurance Solutions

### Agency Onboarding Portal

User created successfully  
A temporary password has been emailed to [redacted]  
Please login below with your email and temporary password

Email  
[redacted]

Password

Login

The New User Setup page is displayed.

## Set Up Security Options

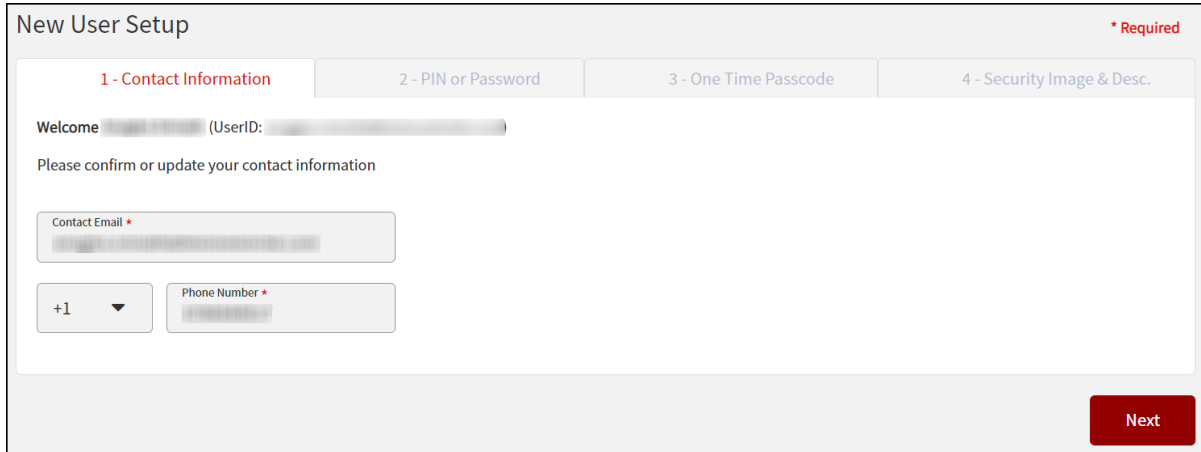
The New User Setup page lets you verify your contact information, select your preferred method of sign-in, review the channels to receive the LexisNexis® One Time Password (OTP), and choose a security image and description.



## Verify Contact Information

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

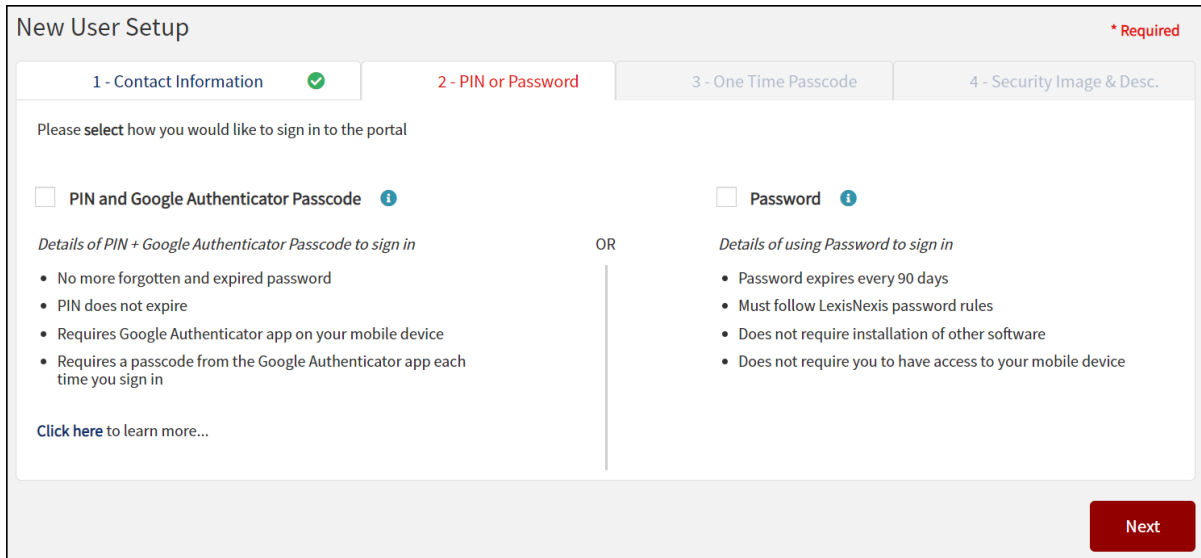
Verify your contact information, and click **Next**.



The screenshot shows the 'New User Setup' page with a progress bar at the top indicating four steps: 1 - Contact Information (active), 2 - PIN or Password, 3 - One Time Passcode, and 4 - Security Image & Desc. Below the progress bar, there is a 'Welcome' message with a blurred name and 'UserID:'. A prompt asks the user to 'Please confirm or update your contact information'. There are two input fields: 'Contact Email' with a red asterisk and a dropdown menu for 'Phone Number' with a red asterisk and a '+1' country code selector. A red 'Next' button is located at the bottom right.

## Set up Sign-in Method

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



The screenshot shows the 'New User Setup' page with a progress bar at the top indicating four steps: 1 - Contact Information (completed with a green checkmark), 2 - PIN or Password (active), 3 - One Time Passcode, and 4 - Security Image & Desc. Below the progress bar, there is a prompt: 'Please select how you would like to sign in to the portal'. There are two radio button options: 'PIN and Google Authenticator Passcode' (selected) and 'Password'. Below each option are bulleted details. For the PIN option: 'No more forgotten and expired password', 'PIN does not expire', 'Requires Google Authenticator app on your mobile device', and 'Requires a passcode from the Google Authenticator app each time you sign in'. For the Password option: 'Password expires every 90 days', 'Must follow LexisNexis password rules', 'Does not require installation of other software', and 'Does not require you to have access to your mobile device'. A 'Click here to learn more...' link is present under the PIN option. A red 'Next' button is located at the bottom right.

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

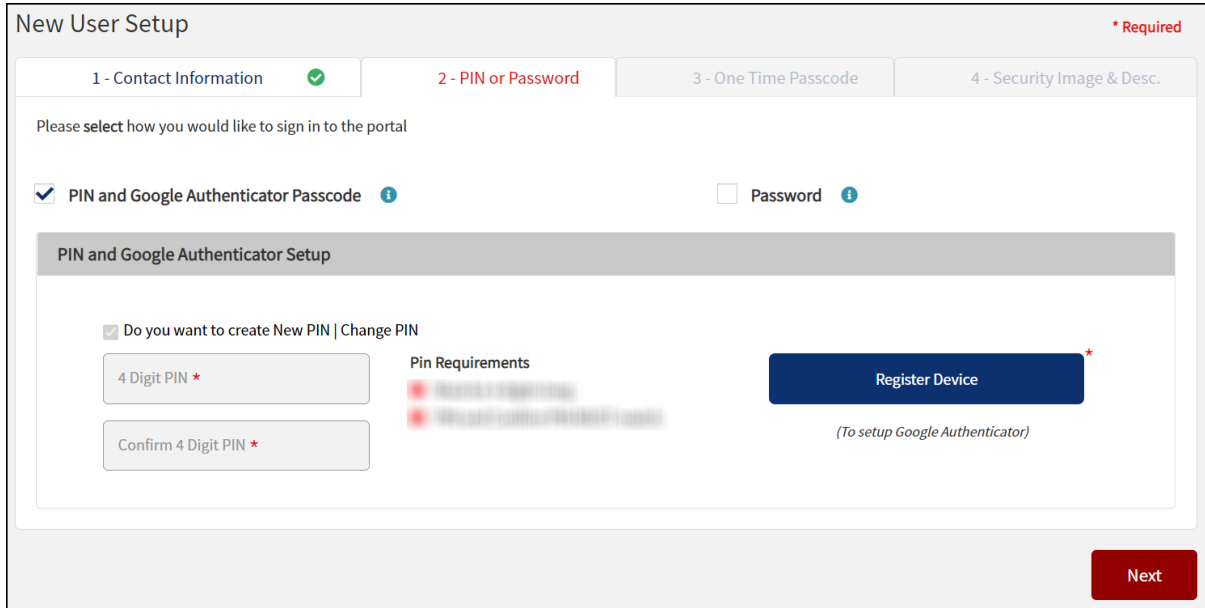
To sign in using the **Password** option, see "Password" on page 15.

## 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**.



New User Setup \* Required

1 - Contact Information ✔    2 - PIN or Password    3 - One Time Passcode    4 - Security Image & Desc.

Please select how you would like to sign in to the portal

PIN and Google Authenticator Passcode i     Password i

**PIN and Google Authenticator Setup**

Do you want to create New PIN | Change PIN

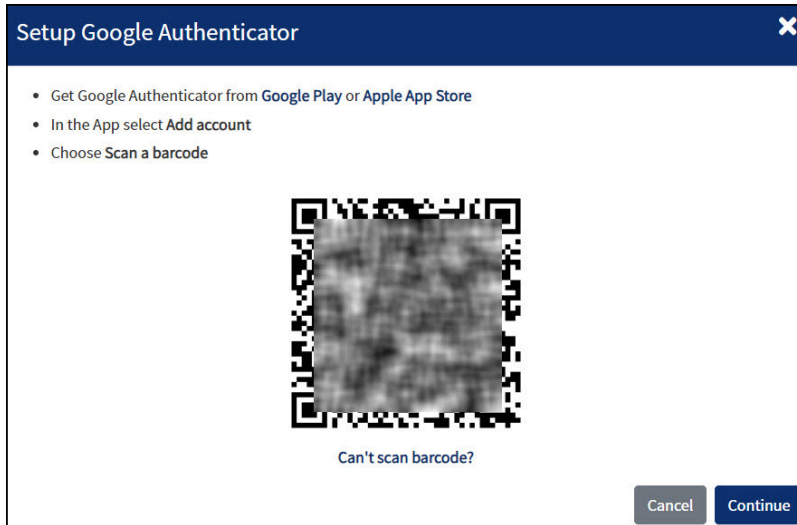
4 Digit PIN \*    Pin Requirements

Confirm 4 Digit PIN \*    ✘ ✘

**Register Device** \*  
*(To setup Google Authenticator)*

**Next**

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 42.*


## **iOS Platform**

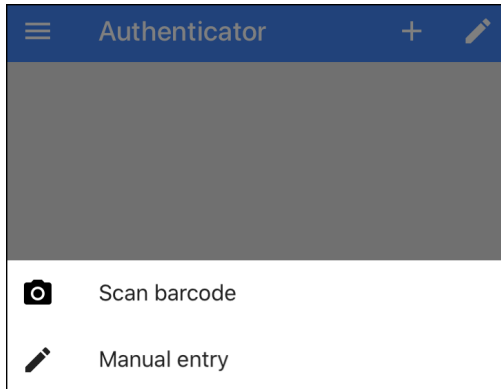
You can register your device either by scanning the barcode or by entering the key.


### *Scan Barcode*

You can register your device by scanning the barcode.


**Procedure:**

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



 *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 44 for more details.*


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

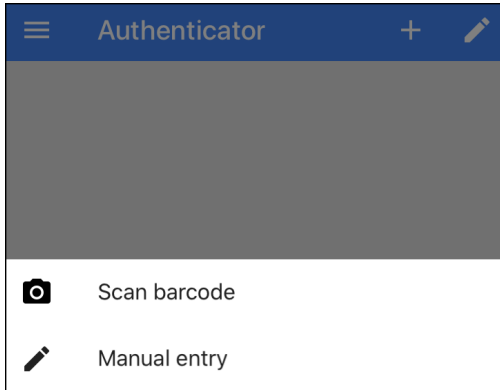
*Enter Key*

You can register your device by entering the alphanumeric key.

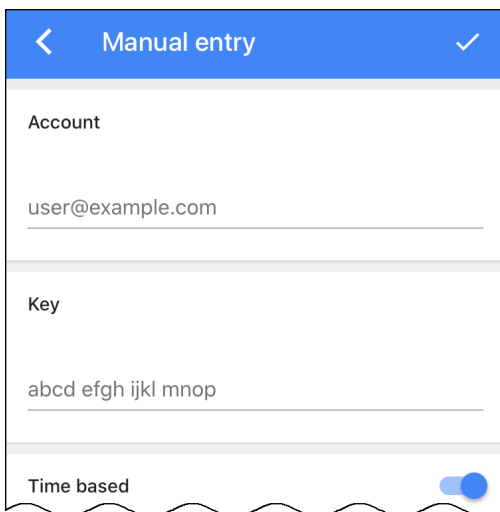
 *The alphanumeric key is long and case-sensitive, because of which there is a high probability of an error while entering. Therefore, use this option only if you are unable to scan the barcode.*

**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**.



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 44 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

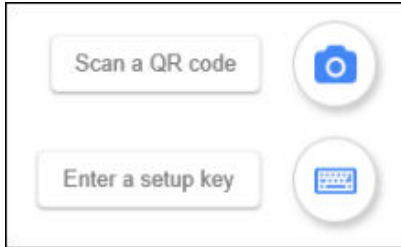
You can register your device either by scanning the barcode or by entering the key.


### Scan Barcode

You can register your device by scanning the barcode.

#### Procedure:

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



 *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 44 for more details.*


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

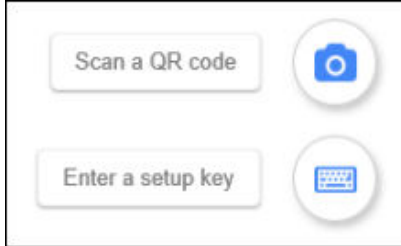
### Enter Key

You can register your device by entering the alphanumeric key.

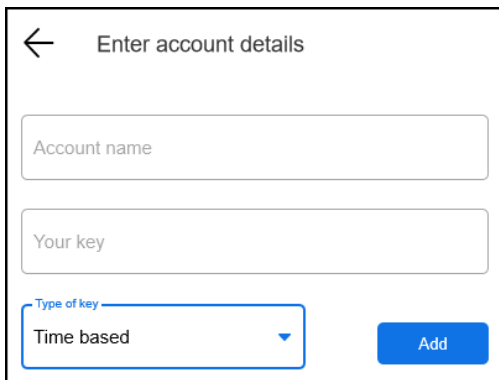
 *The alphanumeric key is long and case-sensitive, because of which there is a high probability of an error while entering. Therefore, use this option only if you are unable to scan the QR code.*

**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**.



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



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.



*If you see a message that says the passcode is invalid, the passcode might be near expiration. See "Invalid Google Authenticator Passcode" on page 44 for more details.*

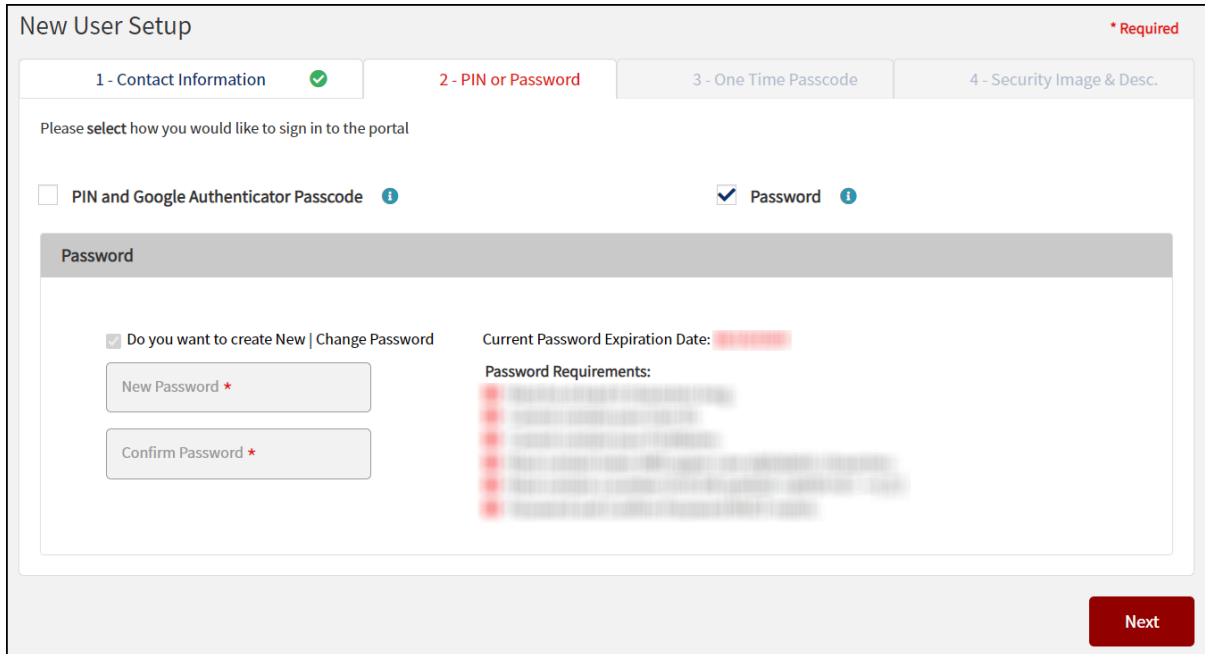
7. Click **Close** on the portal window.  
Your device is now registered on Google Authenticator for the Insurance Solutions portal.

## **Password**

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

**Procedure:**

1. Select **Password**.



The screenshot shows the 'New User Setup' interface. At the top right, it says '\* Required'. The progress bar shows four steps: '1 - Contact Information' (completed with a green check), '2 - PIN or Password' (current step), '3 - One Time Passcode', and '4 - Security Image & Desc.'. Below the progress bar, it asks 'Please select how you would like to sign in to the portal'. There are two options: 'PIN and Google Authenticator Passcode' (unchecked) and 'Password' (checked). Below this, there is a 'Password' section with a checkbox for 'Do you want to create New | Change Password' (checked). To the right, it shows 'Current Password Expiration Date: [redacted]'. Below that are 'Password Requirements' listed with red checkmarks. At the bottom right, there is a red 'Next' button.

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**.



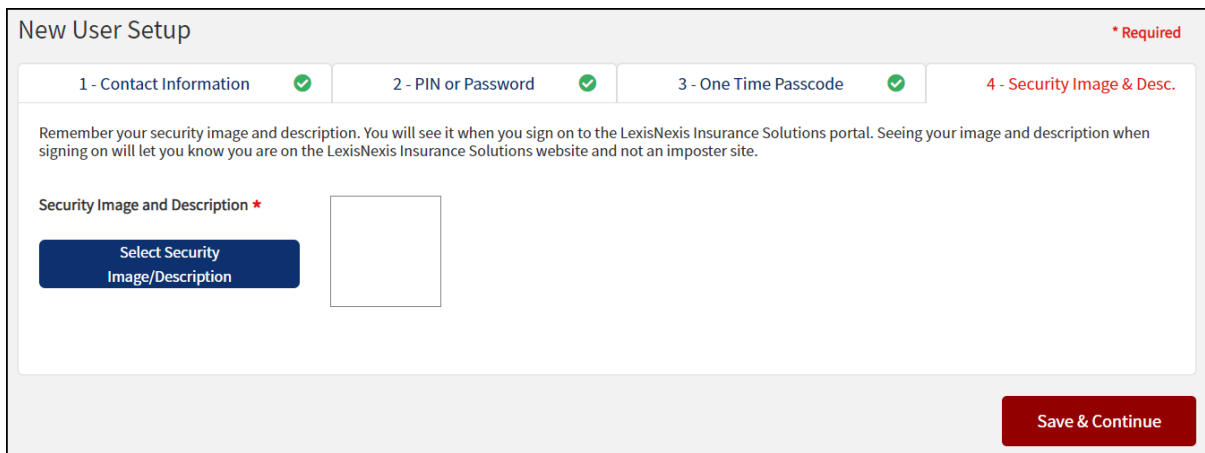
*In certain situations, it becomes necessary to re-register your device on the portal. For more information, see "Re-Register Device" on page 41.*

## 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**.



The screenshot shows a 'New User Setup' form with four steps: 1 - Contact Information (checked), 2 - PIN or Password (checked), 3 - One Time Passcode (checked), and 4 - Security Image & Desc. (required). The current step includes a warning to remember the security image and description, a 'Security Image and Description' label with a red asterisk, a blue 'Select Security Image/Description' button, and a large empty box for the image. A red 'Save & Continue' button is at the bottom right.

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

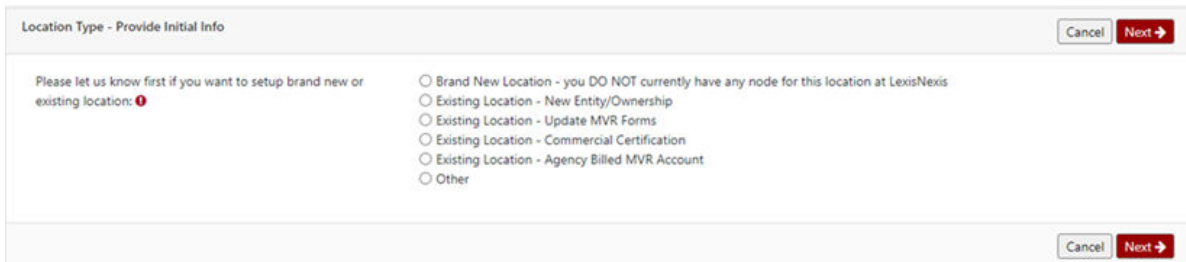
In order to access our Insurance products, you must create and submit an application for service.

## 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<sup>®</sup> Risk Solutions
  - Your agency location has undergone an ownership/entity change
  - You need to submit an application for an additional location



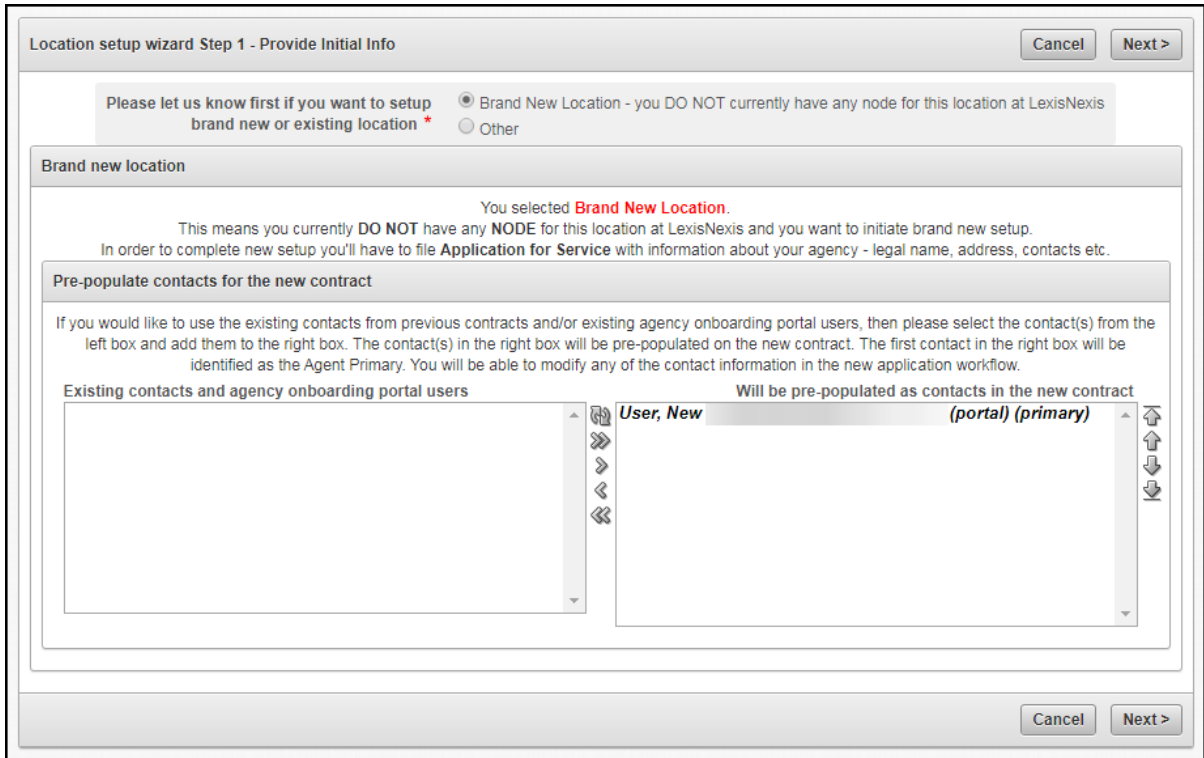
Location Type - Provide Initial Info

Please let us know first if you want to setup brand new or existing location: 

- Brand New Location - you DO NOT currently have any node for this location at LexisNexis
- Existing Location - New Entity/Ownership
- Existing Location - Update MVR Forms
- Existing Location - Commercial Certification
- Existing Location - Agency Billed MVR Account
- Other

If you select **Other**, the contact information for the LexisNexis Risk Solutions Support team will be displayed. Contact the team for assistance on how to proceed.

- When you select **Brand New Location**, your user information is pre-populated in the Contacts pane on the right.



Location setup wizard Step 1 - Provide Initial Info

Please let us know first if you want to setup brand new or existing location \*

Brand New Location - you DO NOT currently have any node for this location at LexisNexis  
 Other

**Brand new location**

You selected **Brand New Location**.  
 This means you currently **DO NOT** have any **NODE** for this location at LexisNexis and you want to initiate brand new setup.  
 In order to complete new setup you'll have to file **Application for Service** with information about your agency - legal name, address, contacts etc.

**Pre-populate contacts for the new contract**

If you would like to use the existing contacts from previous contracts and/or existing agency onboarding portal users, then please select the contact(s) from the left box and add them to the right box. The contact(s) in the right box will be pre-populated on the new contract. The first contact in the right box will be identified as the Agent Primary. You will be able to modify any of the contact information in the new application workflow.

Existing contacts and agency onboarding portal users

Will be pre-populated as contacts in the new contract

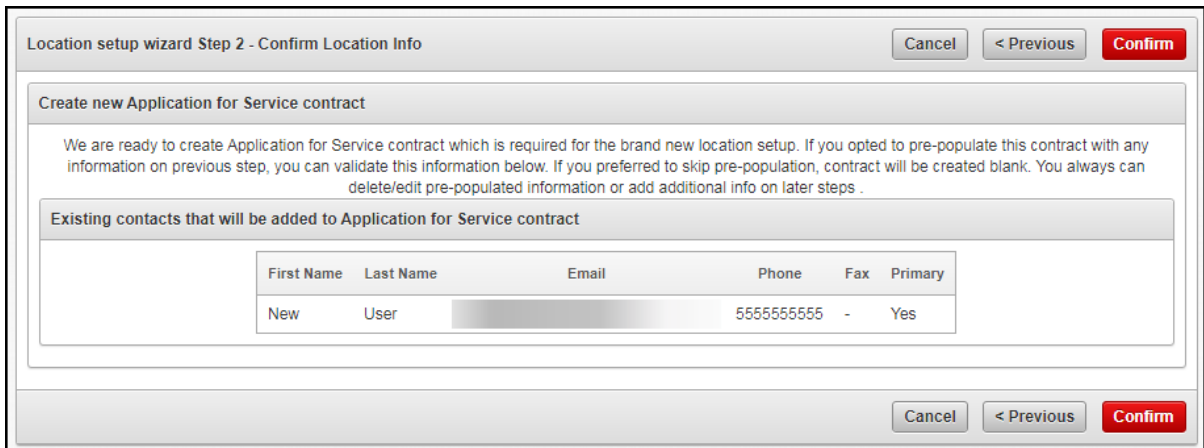
Existing contacts and agency onboarding portal users	Will be pre-populated as contacts in the new contract
	User, New (portal) (primary)



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

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

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



Location setup wizard Step 2 - Confirm Location Info

Cancel < Previous **Confirm**

**Create new Application for Service contract**

We are ready to create Application for Service contract which is required for the brand new location setup. If you opted to pre-populate this contract with any information on previous step, you can validate this information below. If you preferred to skip pre-population, contract will be created blank. You always can delete/edit pre-populated information or add additional info on later steps .

**Existing contacts that will be added to Application for Service contract**

First Name	Last Name	Email	Phone	Fax	Primary
New	User		5555555555	-	Yes

Cancel < Previous **Confirm**

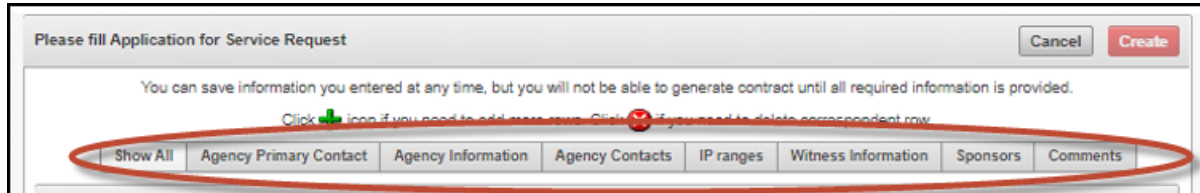
At this point, you have the option to save your application and resume the process at a later time.

## 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.*

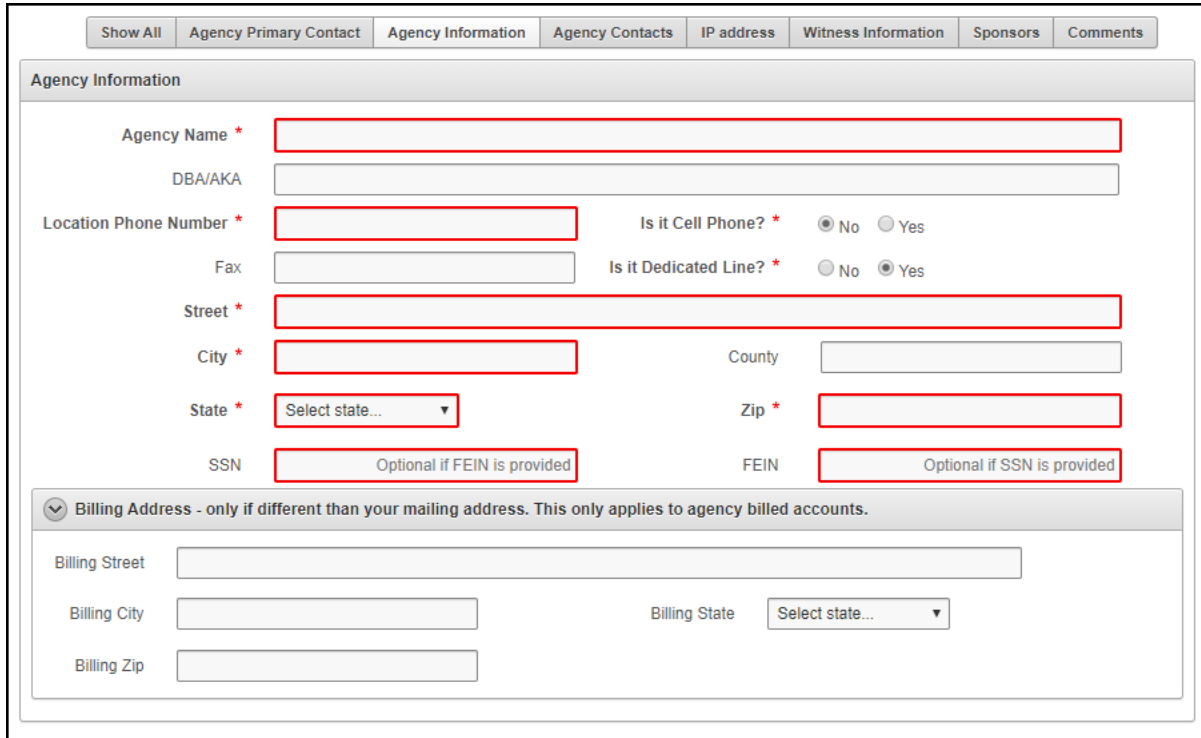
Show All	Agency Primary Contact	Agency Information	Agency Contacts	IP address	Witness Information	Sponsors	Comments
<b>Agency Primary Contact</b>							
This is information about the person completing this package - this person <b>MUST</b> be authorized to sign legal documents on behalf of the the agency/company.							
First Name *	<input type="text"/>	Last Name *	<input type="text"/>				
Title *	<input type="text" value="NOT Acceptable: Mr., Mrs., etc"/> <small>Owner, Agent, President, Principal</small>	Date of Birth *	<input type="text"/>				
Email *	<input type="text"/>	Confirm Email *	<input type="text" value="should match Email field"/>				
Mother's Maiden Name *	<input type="text"/>	National Producer Number (NPN)	<input type="text"/>				
							<input type="button" value="Cancel"/> <input type="button" value="Save"/>

## 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.



The screenshot shows the 'Agency Information' form with the following fields and options:


- Agency Name \* (text input, highlighted)
- DBA/AKA (text input)
- Location Phone Number \* (text input, highlighted) and Is it Cell Phone? \* (radio buttons: No, Yes)
- Fax (text input) and Is it Dedicated Line? \* (radio buttons: No, Yes)
- Street \* (text input, highlighted)
- City \* (text input, highlighted) and County (text input)
- State \* (dropdown menu, highlighted) and Zip \* (text input, highlighted)
- SSN (text input, highlighted) with note 'Optional if FEIN is provided' and FEIN (text input, highlighted) with note 'Optional if SSN is provided'

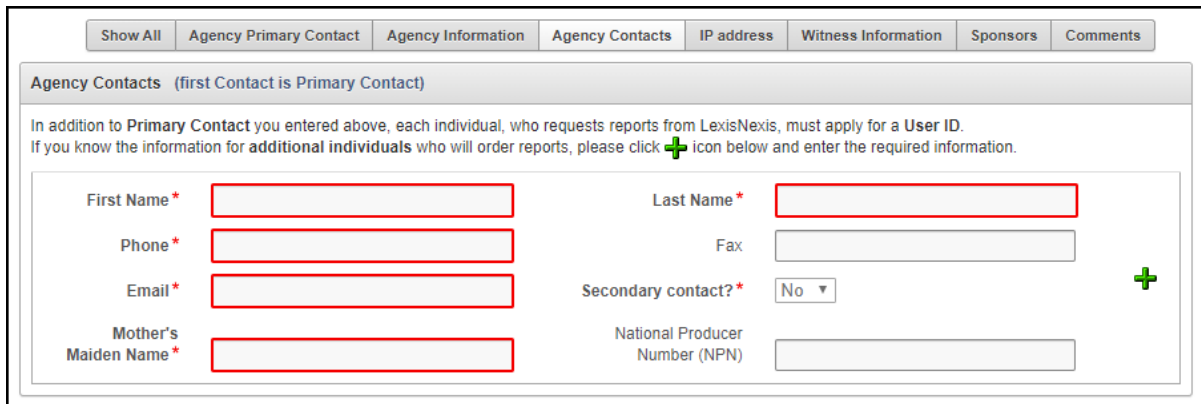
Below the Agency Information is a collapsed section for 'Billing Address - only if different than your mailing address. This only applies to agency billed accounts.' When expanded, it contains:

- Billing Street (text input)
- Billing City (text input) and Billing State (dropdown menu)
- Billing Zip (text input)

## 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 .



The screenshot shows the 'Agency Contacts' form with the following fields and options:

- First Name \* (text input, highlighted) and Last Name \* (text input, highlighted)
- Phone \* (text input, highlighted) and Fax (text input)
- Email \* (text input, highlighted) and Secondary contact? \* (dropdown menu: No, highlighted)
- Mother's Maiden Name \* (text input, highlighted) and National Producer Number (NPN) (text input)

A green plus icon is visible on the right side of the form, indicating the option to add more contacts.

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**.


First Name *	<input type="text"/>	Last Name *	<input type="text"/>	✖
Phone *	<input type="text"/>	Fax	<input type="text"/>	
Email *	<input type="text"/>	Secondary contact? *	<input type="button" value="Yes"/>	
Mother's Maiden Name *	<input type="text"/>	National Producer Number (NPN)	<input type="text"/>	

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 .

<a href="#">Show All</a>	<a href="#">Agency Primary Contact</a>	<a href="#">Agency Information</a>	<a href="#">Agency Contacts</a>	<a href="#">IP address</a>	<a href="#">Witness Information</a>	<a href="#">Sponsors</a>	<a href="#">Comments</a>
--------------------------	--	------------------------------------	---------------------------------	----------------------------	-------------------------------------	--------------------------	--------------------------

IP address [\(what is my IP?\)](#)

You must add an IP address for each physical location (i.e., working from home, another alternate location, etc.)  
Only fill out one IP address if you do not have a range assigned to you

Start IP	End IP	+/-
<input type="text" value="Start IP address"/>	<input type="text" value="End IP address (optional)"/>	




## Witness Information

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

Show All	Agency Primary Contact	Agency Information	Agency Contacts	IP address	Witness Information	Sponsors	Comments
<b>Witness Information</b>							
<p>In order for the signature of the witness to be electronically signed and the forms completed, you must type the first and last name, telephone number, fax number, title and e-mail address of the witness in the appropriate fields. The witness must be someone other than yourself. Your witness should be present when you enter his/her name so the witness will be able to attest to the fact that you electronically signed these forms.</p>							
Witness First Name *	<input type="text"/>	Witness Last Name *	<input type="text"/>				
Witness Title *	<input type="text"/>	Witness Email *	<input type="text"/>				
	<a href="#">Owner</a> , <a href="#">Agent</a> , <a href="#">President</a> , <a href="#">Principal</a>						
Witness Phone *	<input type="text"/>	Witness Fax *	<input type="text"/>				

## 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.



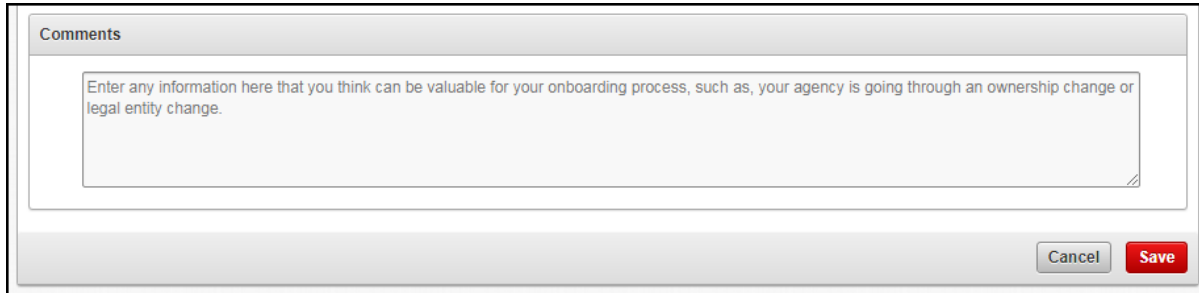
*If your sponsor is not mentioned in the drop-down list, contact the Customer Support team at 800.456.6432, or use the chat feature to chat with a customer support representative.*

Show All	Agency Primary Contact	Agency Information	Agency Contacts	IP address	Witness Information	Sponsors	Comments
<b>Sponsors</b>							
<p>A minimum of one sponsor is required. You may reference up to six total sponsors to assist us with the proper setup of your account. If you have an Agency ID code, please enter it in the field below. If you are unsure or do not have one, please enter "None". It is your responsibility to contact any and all sponsoring companies and request that they submit the appropriate authorization on your behalf. Failure to do so will delay the account setup process.</p>							
Sponsor	Agency ID code			+/-			
<input type="text" value="Select Sponsor..."/>	<input type="text" value="Use NONE if unknown"/>						

## Comments

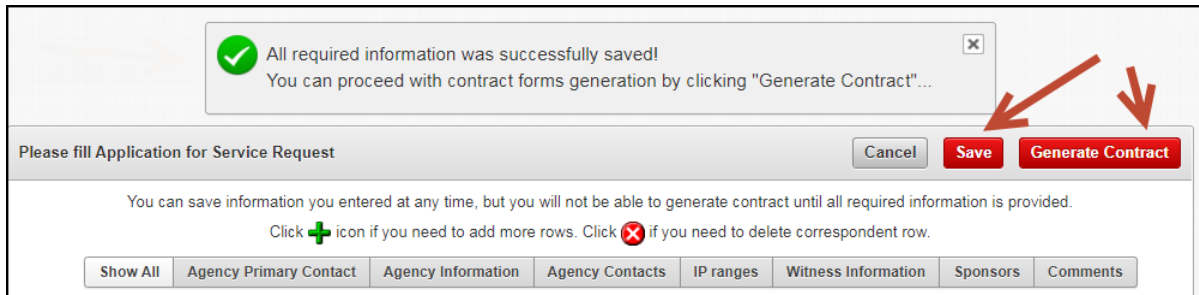
Comments can include details that may assist in onboarding your agency in a timely manner, such as the reason for submitting an application, ownership change, entity change, or a new location.

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



The screenshot shows a 'Comments' section with a text area containing the placeholder text: 'Enter any information here that you think can be valuable for your onboarding process, such as, your agency is going through an ownership change or legal entity change.' Below the text area are two buttons: 'Cancel' and 'Save'.

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



The screenshot shows a success message box at the top: 'All required information was successfully saved! You can proceed with contract forms generation by clicking "Generate Contract"...'. Below the message box, there are buttons for 'Cancel', 'Save', and 'Generate Contract'. Two red arrows point from the 'Save' and 'Generate Contract' buttons to the success message box. Below the buttons, there is a message: 'You can save information you entered at any time, but you will not be able to generate contract until all required information is provided. Click + icon if you need to add more rows. Click X icon if you need to delete correspondent row.' At the bottom, there is a navigation bar with buttons for 'Show All', 'Agency Primary Contact', 'Agency Information', 'Agency Contacts', 'IP ranges', 'Witness Information', 'Sponsors', and 'Comments'.



*Review your information for accuracy.*

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

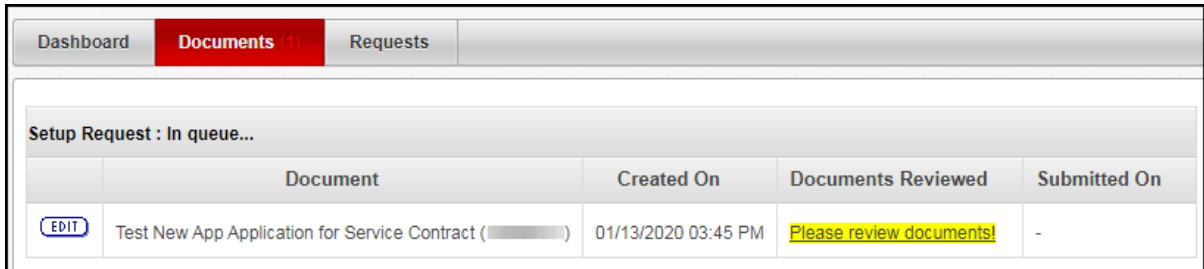
Once you have saved your information, click **Generate Contract** to proceed to submit the application.

## Review and Sign Documents

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

**Procedure:**

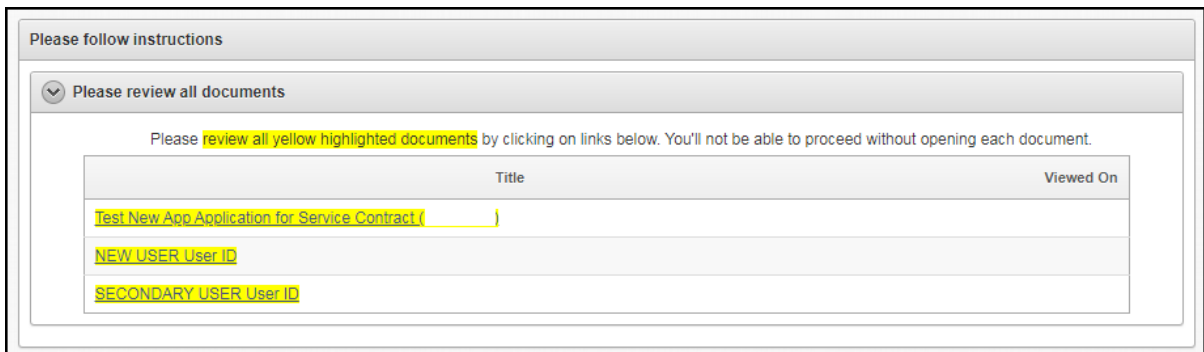
1. On the **Documents** tab, click **Please review documents**.



Setup Request : In queue...				
	Document	Created On	Documents Reviewed	Submitted On
<a href="#">EDIT</a>	Test New App Application for Service Contract ( )	01/13/2020 03:45 PM	<a href="#">Please review documents!</a>	-

A list of documents to be reviewed is displayed.

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



Please follow instructions

Please review all documents

Please [review all yellow highlighted documents](#) by clicking on links below. You'll not be able to proceed without opening each document.

Title	Viewed On
<a href="#">Test New App Application for Service Contract ( )</a>	
<a href="#">NEW USER User ID</a>	
<a href="#">SECONDARY USER User ID</a>	

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.*

- 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**.

Please follow instructions

Documents were reviewed on 01/13/2020

Please sign all documents

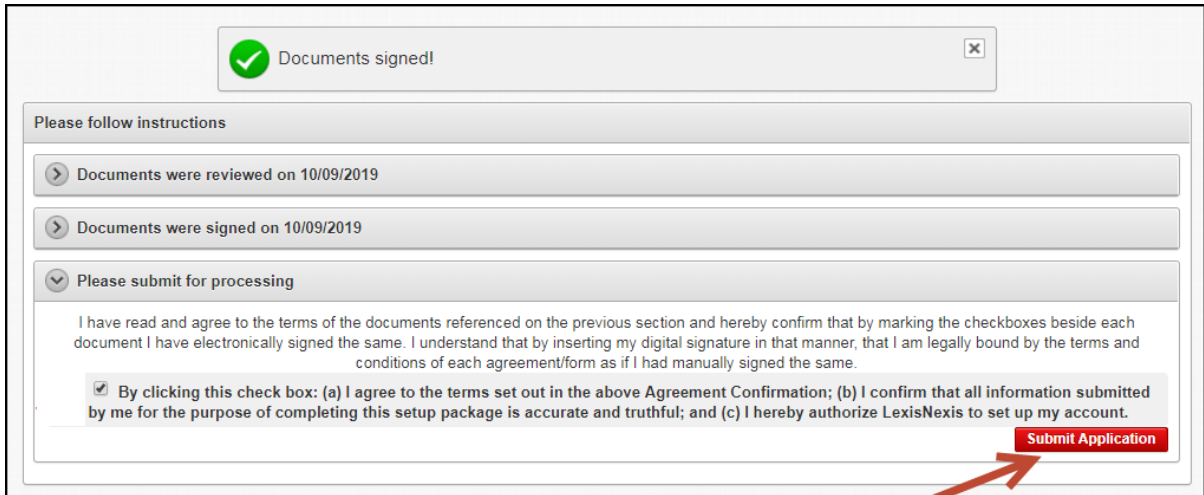
Please check **all highlighted boxes**. All boxes must be checked to successfully submit this application on the next step.

Document	Form	Sign	Signed On
Test New App Application for Service Contract ( )	<a href="#">Agreement for Service/Certification (Form 145)</a>	<input type="checkbox"/>	
	<a href="#">Colorado Requestor Release and Affidavit of Intended Use</a>	<input type="checkbox"/>	
	<a href="#">Colorado Agreement for Drivers License Record Processing</a>	<input type="checkbox"/>	
	<a href="#">Georgia Department of Driver Services Bulk User Certificate</a>	<input type="checkbox"/>	
	<a href="#">Maryland DOT Motor Vehicle Administration Privacy Protection Policy</a>	<input type="checkbox"/>	
	<a href="#">Ohio OBMV Record Request</a>	<input type="checkbox"/>	
	<a href="#">State of Washington Subscriber Certification of Use</a>	<input type="checkbox"/>	
	<a href="#">California Requester Code Form (info only)</a>		
	<a href="#">Utah MVRs and Monitoring (info only)</a>		
NEW USER User ID	<a href="#">User ID form</a>	<input type="checkbox"/>	
SECONDARY USER User ID	<a href="#">User ID form</a>	<input type="checkbox"/>	



*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**.



Documents signed!

Please follow instructions

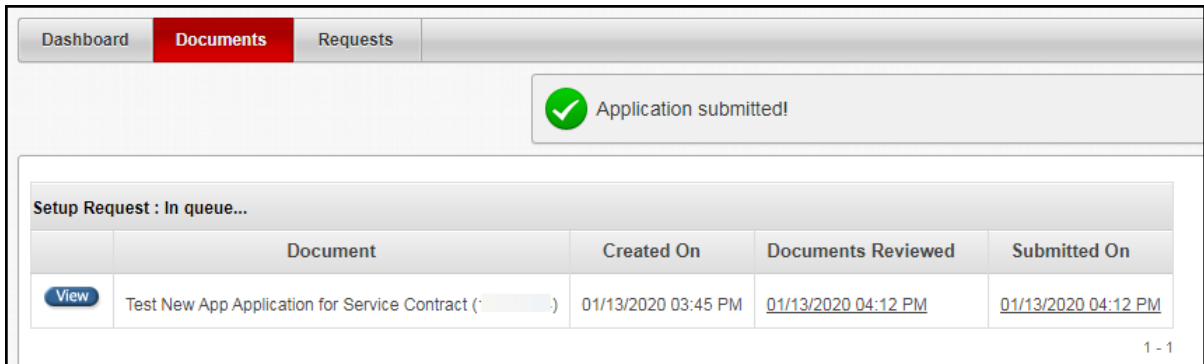
- Documents were reviewed on 10/09/2019
- Documents were signed on 10/09/2019
- Please submit for processing

I have read and agree to the terms of the documents referenced on the previous section and hereby confirm that by marking the checkboxes beside each document I have electronically signed the same. I understand that by inserting my digital signature in that manner, that I am legally bound by the terms and conditions of each agreement/form as if I had manually signed the same.

By clicking this check box: (a) I agree to the terms set out in the above Agreement Confirmation; (b) I confirm that all information submitted by me for the purpose of completing this setup package is accurate and truthful; and (c) I hereby authorize LexisNexis to set up my account.

**Submit Application**

A confirmation page is displayed.



Dashboard **Documents** Requests

Application submitted!

Setup Request : In queue...

	Document	Created On	Documents Reviewed	Submitted On
<a href="#">View</a>	Test New App Application for Service Contract ( )	01/13/2020 03:45 PM	<a href="#">01/13/2020 04:12 PM</a>	<a href="#">01/13/2020 04:12 PM</a>

1 - 1

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.

Cancel

Please fill Application for Service Request

Information entered can be saved at any time. You will not be able to generate contract until all required information is provided.  
Click **+** icon if you need to add more rows. Click **×** if you need to delete correspondent row.

Show All | 
 Agency Primary Contact | 
 Agency Information | 
 Agency Contacts | 
 IP address | 
 Witness Information | 
 Sponsors | 
 Comments

**Agency Primary Contact**

This is information about the person completing this package - this person **MUST** be authorized to sign legal documents on behalf of the the agency/company.

<b>First Name *</b> <input type="text" value="New"/>	<b>Last Name *</b> <input type="text" value="User"/>
<b>Title *</b> <input type="text" value="Owner"/> <small><a href="#">Owner</a>, <a href="#">Agent</a>, <a href="#">President</a>, <a href="#">Principal</a></small>	<b>Date of Birth *</b> <input type="text" value="01/13/1920"/>
<b>Email *</b> <input type="text"/>	<b>Confirm Email *</b> <input type="text"/>
<b>Mother's Maiden Name *</b> <input type="text" value="user"/>	<b>National Producer Number (NPN)</b> <input type="text"/>

**Agency Information**

**Agency Name \***

DBA/AKA

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.

Expand/Collapse

Please follow instructions

- > Documents were reviewed on 01/13/2020
- > Documents were signed on 01/13/2020
- > Documents were submitted for final processing on 01/13/2020

## Chapter 4

# Account Management

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

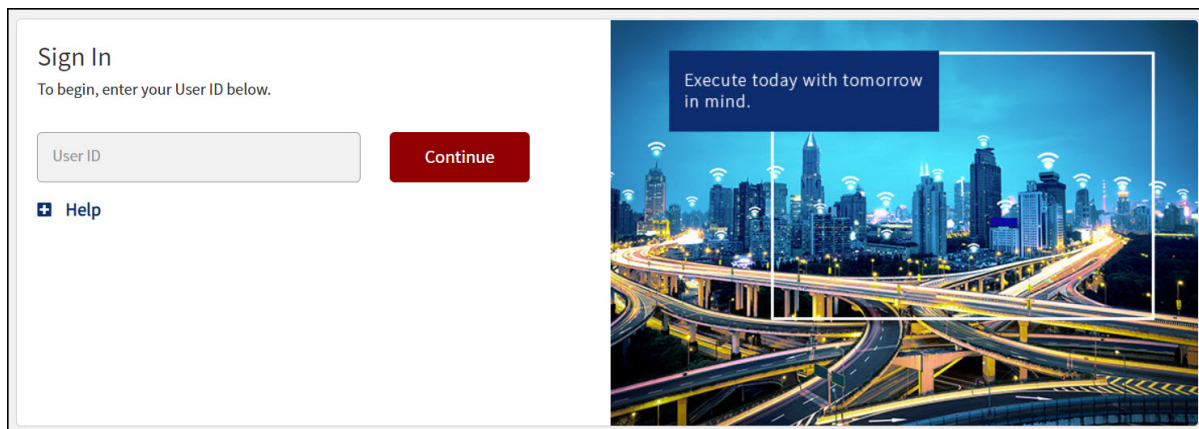
You can perform the following tasks:

- 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.lexisnexisrisk.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.*

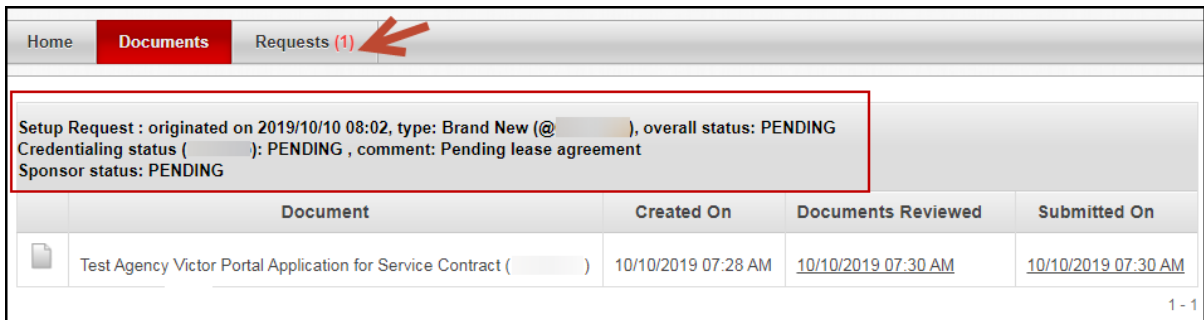
If you previously selected **Password** as your preferred method of sign-in, the system might not recognize your location. In that case, you will see a screen asking you to select an option to receive the LexisNexis<sup>®</sup> One Time Password (OTP). Select an option, and click **Send Passcode**. Enter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



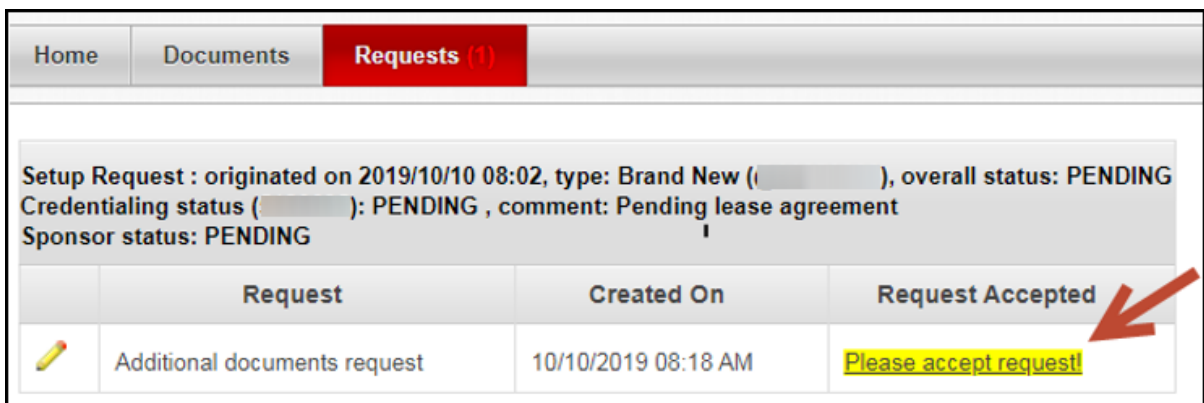
Document	Created On	Documents Reviewed	Submitted On
 Test Agency Victor Portal Application for Service Contract ( ... )	10/10/2019 07:28 AM	<a href="#">10/10/2019 07:30 AM</a>	<a href="#">10/10/2019 07:30 AM</a>


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

### Request-related Information

Data Item	Description
Setup request status	Status of the request
@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

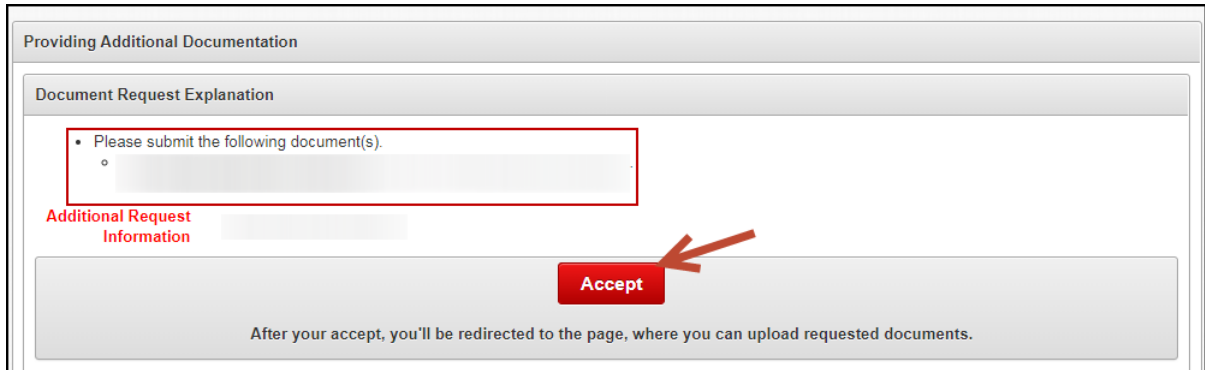
2. Click the **Requests** tab to view the request details. Click **Please accept request!** to view the pending documents to submit.



Request	Created On	Request Accepted
 Additional documents request	10/10/2019 08:18 AM	<a href="#">Please accept request!</a>

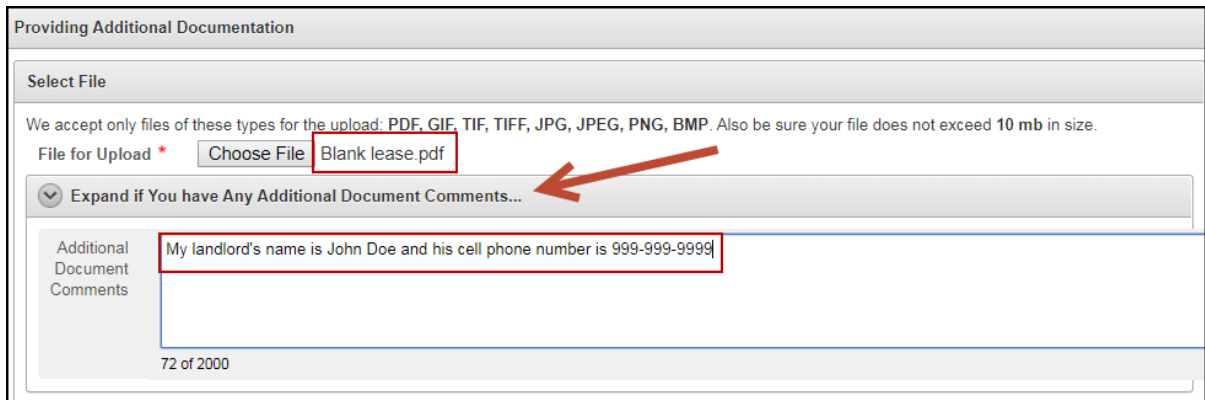


3. View the list of pending documents to submit, and click **Accept**.



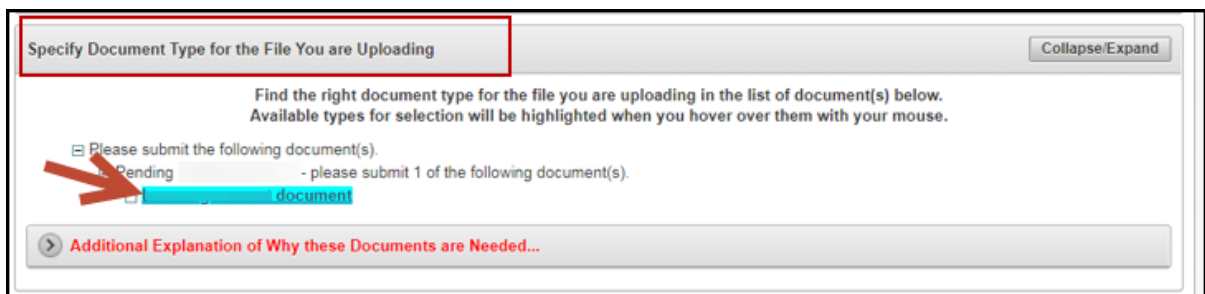
The screenshot shows a web form titled "Providing Additional Documentation". Under the "Document Request Explanation" section, there is a list of pending documents. A red box highlights the text "Please submit the following document(s)". Below this, there is a section for "Additional Request Information" with a red arrow pointing to a red "Accept" button. At the bottom of the form, a message states: "After your accept, you'll be redirected to the page, where you can upload requested documents."

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).



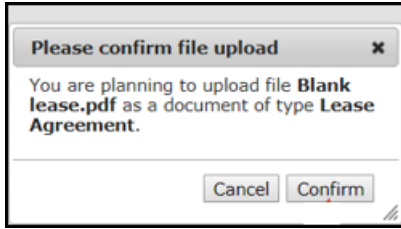
The screenshot shows the "Providing Additional Documentation" page. Under the "Select File" section, it lists acceptable file types: PDF, GIF, TIF, TIFF, JPG, JPEG, PNG, BMP, with a 10 mb size limit. A "Choose File" button is next to the filename "Blank lease.pdf". Below this, there is a section for "Additional Document Comments" with a red arrow pointing to the "Expand if You have Any Additional Document Comments..." link. The comments field contains the text: "My landlord's name is John Doe and his cell phone number is 999-999-9999".

5. In the Specify Document Type for the File You are Uploading section, click the document name. The document name is highlighted in blue.



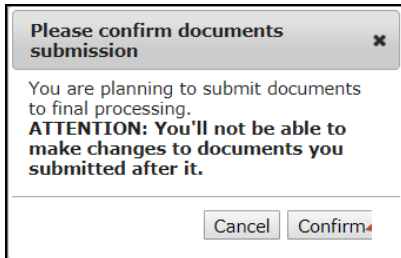
The screenshot shows the "Specify Document Type for the File You are Uploading" section. It contains a list of document types. A red box highlights the title of the section. A red arrow points to a document name in the list, which is highlighted in blue. Below the list, there is a link for "Additional Explanation of Why these Documents are Needed...".

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.

Home <b>Documents</b> Requests				
Setup Request : originated on 2019/10/10 08:02, type: Brand New (@ ), overall status: PENDING Credentialing status ( ): PENDING , comment: Pending lease agreement Sponsor status: PENDING				
	Document	Created On	Documents Reviewed	Submitted On
	Additional documents	10/10/2019 08:34 AM	<a href="#">10/10/2019 09:04 AM</a>	<a href="#">10/10/2019 09:08 AM</a>
	Test Agency Victor Portal Application for Service Contract ( )	10/10/2019 07:28 AM	<a href="#">10/10/2019 07:30 AM</a>	<a href="#">10/10/2019 07:30 AM</a>

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® Risk Solutions via the agency onboarding portal.

**Procedure:**

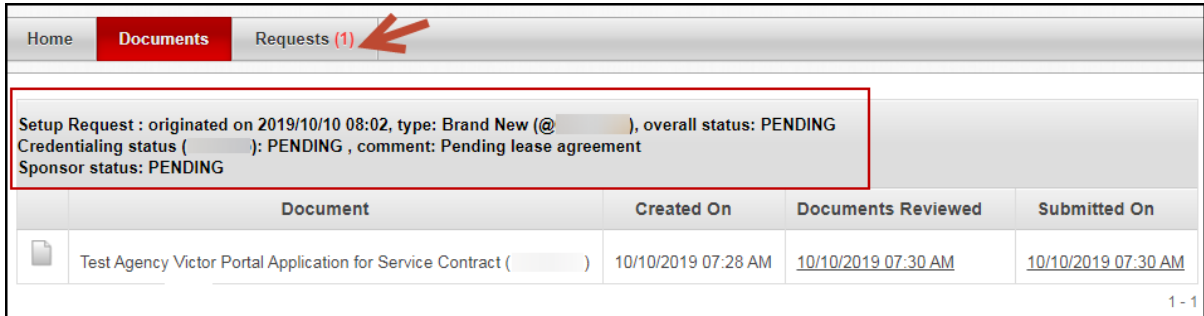
1. Log in to the portal either through the link provided in the email, or by going to <https://insurancesolutions.lexisnexisrisk.com/idslogin/>.




*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 the system does not recognize your device or location, you might need to request OTP for verification. See "Unrecognized Location or Device" for more details.*

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






The screenshot shows the portal's navigation bar with 'Home', 'Documents', and 'Requests (1)' tabs. A red arrow points to the 'Requests (1)' tab. Below the navigation bar, a red-bordered box highlights the details of a pending request: 'Setup Request : originated on 2019/10/10 08:02, type: Brand New (@ [redacted]), overall status: PENDING', 'Credentialing status ([redacted]): PENDING, comment: Pending lease agreement', and 'Sponsor status: PENDING'. Below this is a table with columns for Document, Created On, Documents Reviewed, and Submitted On.

Document	Created On	Documents Reviewed	Submitted On
 Test Agency Victor Portal Application for Service Contract ( [redacted] )	10/10/2019 07:28 AM	<a href="#">10/10/2019 07:30 AM</a>	<a href="#">10/10/2019 07:30 AM</a>

1 - 1

- Click the highlighted text to accept the request.


Home			Documents	Requests (2)
Setup Request : originated on 2019/10/10 08:02, type: Brand New (@ Credentialing status ( ): WITHDRAWN, comment: Need application Sponsor status: PENDING				
	Request	Created On	Request Accepted	
	New contract request	10/10/2019 09:28 AM	Please accept request!	
	Additional documents request	10/10/2019 09:19 AM	10/10/2019 09:31 AM	
	Additional documents request	10/10/2019 08:18 AM	10/10/2019 08:34 AM	

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.

**New Contract Request**

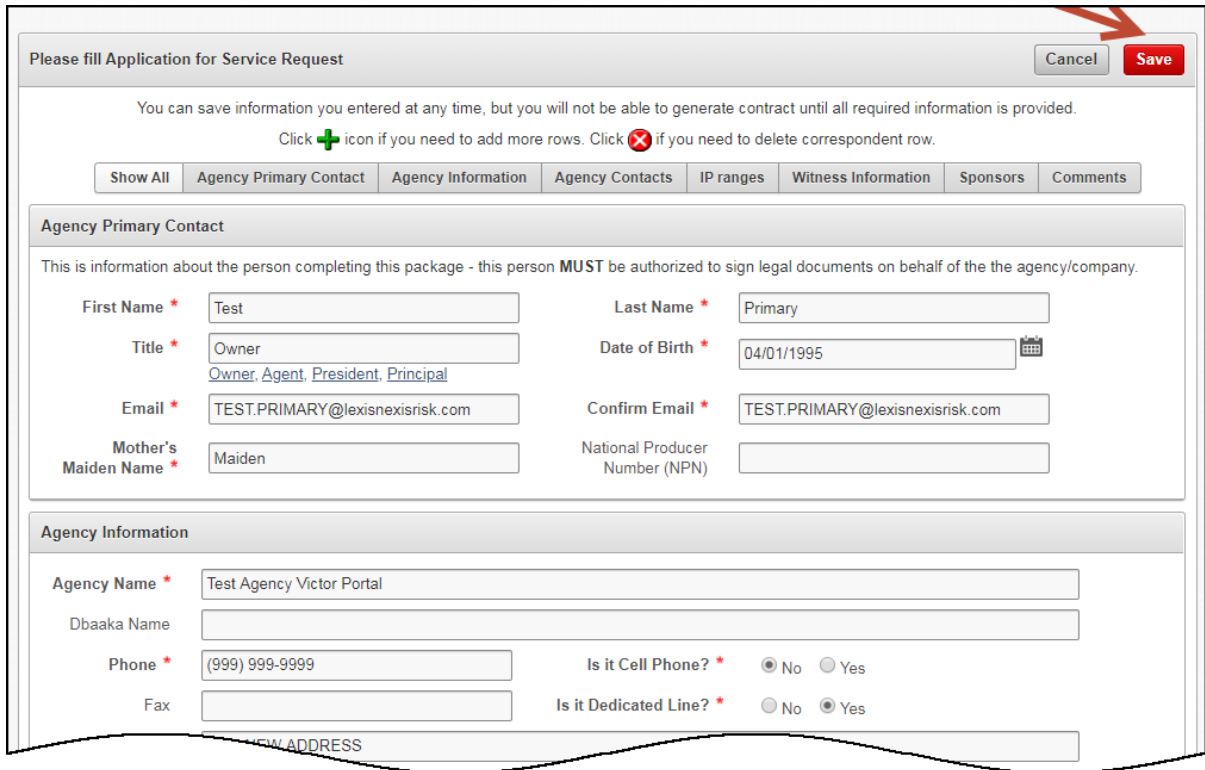
This is why we are asking you to submit new contract:  
Need application

Select existing contract to clone \*





After your accept, contract selected above will be copied, you'll be redirected to the page, where you can modify it up to your needs.

4. Select the application that you want to modify, and click **Accept**.  
The original application is displayed.
5. Make the necessary changes, and click **Save**.



Please fill Application for Service Request Cancel Save

You can save information you entered at any time, but you will not be able to generate contract until all required information is provided.  
Click  icon if you need to add more rows. Click  if you need to delete correspondent row.

Show All Agency Primary Contact Agency Information Agency Contacts IP ranges Witness Information Sponsors Comments

**Agency Primary Contact**

This is information about the person completing this package - this person **MUST** be authorized to sign legal documents on behalf of the the agency/company.

First Name \* Test Last Name \* Primary  
 Title \* Owner Date of Birth \* 04/01/1995  
Owner, Agent, President, Principal  
 Email \* TEST.PRIMARY@lexisnexisrisk.com Confirm Email \* TEST.PRIMARY@lexisnexisrisk.com  
 Mother's Maiden Name \* Maiden National Producer Number (NPN)

**Agency Information**

Agency Name \* Test Agency Victor Portal  
 Dbaaka Name  
 Phone \* (999) 999-9999 Is it Cell Phone? \*  No  Yes  
 Fax Is it Dedicated Line? \*  No  Yes

NEW ADDRESS

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:

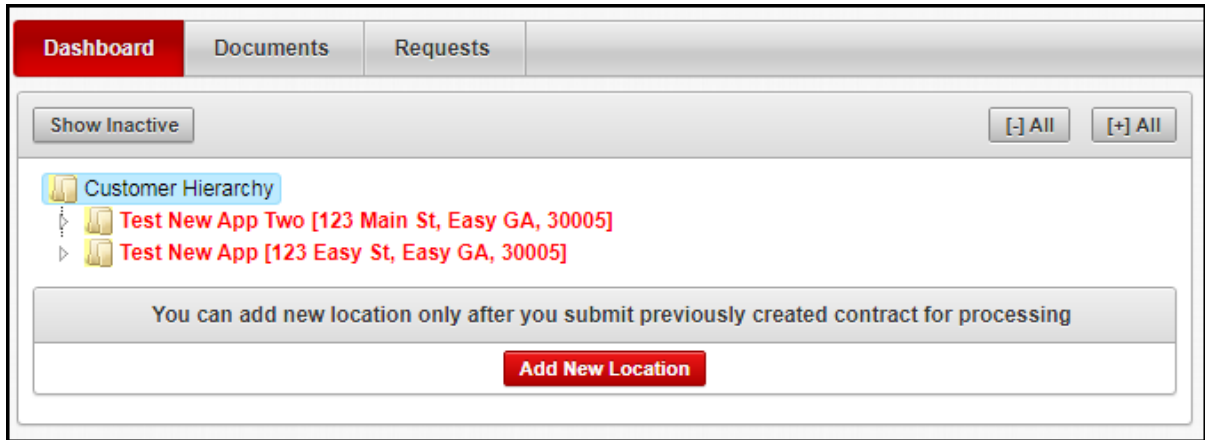
1. Log in to the portal at <https://insurancesolutions.lexisnexisrisk.com/idslogin/>.



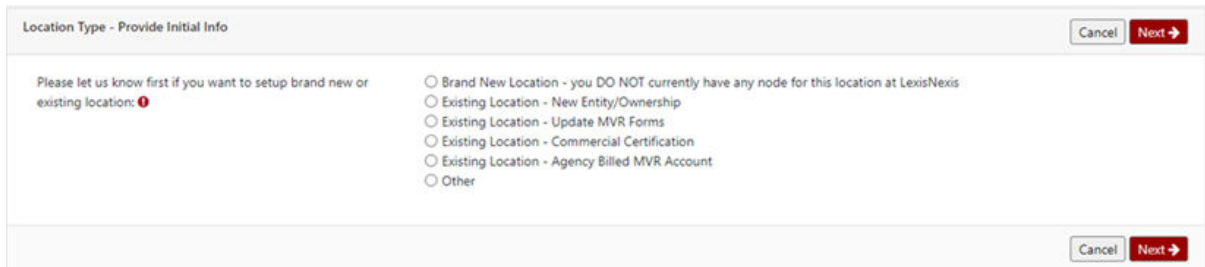
*If you do not recognize your security image, there may be a problem with your user ID. Contact the Customer Support team either at 800.456.6432 or through the chat functionality.*

*If the system does not recognize your device or location, you might need to request OTP for verification. See "Unrecognized Location or Device" for more details.*

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



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




The screenshot shows the 'Location Type - Provide Initial Info' page. It contains a message: 'Please let us know first if you want to setup brand new or existing location:'. Below this message are five radio button options:
 

- Brand New Location - you DO NOT currently have any node for this location at LexisNexis
- Existing Location - New Entity/Ownership
- Existing Location - Update MVR Forms
- Existing Location - Commercial Certification
- Existing Location - Agency Billed MVR Account
- Other

 At the top right and bottom right of the form are 'Cancel' and 'Next' buttons. The 'Next' button at the bottom right is highlighted with a red arrow.

- 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.*

**Pre-populate new contract based on previously submitted contract**



We can help you to pre-populate Application for Service contract with information, we already have on file: you can use any of already existing contracts as a template to pre-populate name, address, contacts and other information for your new location. You will be able to modify any of this information later.

In the dropdown below, select an existing contract to clone or select "I don't want to clone - leave contract blank" \*

- Select the user(s) that you want to add to the contract, and add the user to the Contacts pane on the right.

**Pre-populate contacts for the new contract**

If you would like to use the existing contacts from previous contracts and/or existing agency onboarding portal users, then please select the contact(s) from the left box and add them to the right box. The contact(s) in the right box will be pre-populated on the new contract. The first contact in the right box will be identified as the Agent Primary. You will be able to modify any of the contact information in the new application workflow.

Existing contacts and agency onboarding portal users		Will be pre-populated as contacts in the new contract
User, New ( [redacted]@mail.com) User, Secondary (secondaryuser@email.com)	 	(Empty box)

Click **Next**.

- 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.

**Dashboard** | Documents | Requests

Show Inactive [-] All [+]

- Customer Hierarchy
  - Test New App Two [123 Main St, Easy GA, 30005]
    - Maintenance
      - Agency Onboarding Portal Users
      - Documents
      - Requests
  - Test New App [123 Easy St, Easy GA, 30005]
    - Maintenance
      - Agency Onboarding Portal Users
      - Documents
      - Requests

## 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.

The screenshot shows the LexisNexis dashboard with a navigation bar (Dashboard, Documents, Requests) and a sidebar for Customer Hierarchy. The main content area is split into two panes. The left pane shows a tree view of the Customer Hierarchy with several application nodes. The right pane displays details for 'Test New App Two [123 Main St, Easy GA, 30005]'. The details are organized into sections: General, Address, and Processing.

General	
Overall Status:	In process by LexisNexis - see Process section for details
Contract ID:	
Created on:	01/13/2020 05:37 PM
Name:	Test New App Two
Submitted to LexisNexis on:	01/13/2020 05:40 PM
Submitted to LexisNexis by:	

Address	
Street:	123 Main St
City:	Easy
State:	GA
ZIP:	30005

Processing	
LexisNexis started processing on:	01/16/2020 10:10 AM
Temporary node:	@
Overall status:	PENDING
Passed to Credentialing on:	01/16/2020 10:15 AM
Credentialing comment:	Pending lease agreement
Name:	Test New App Two
Address:	123 Main St
City:	Easy
State:	GA
ZIP:	30005

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.

The screenshot shows the LexisNexis dashboard with the Customer Hierarchy expanded to show 'JL (Node ID)'. The right pane displays details for 'JL (Node ID)'. The details are organized into sections: General and Address.

General	
Node Status:	Active
Name:	Test New App Two
Node:	JL
Agency Number:	

Address	
Address:	123 Main St
City:	Easy
State:	GA
ZIP:	30005



## 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.



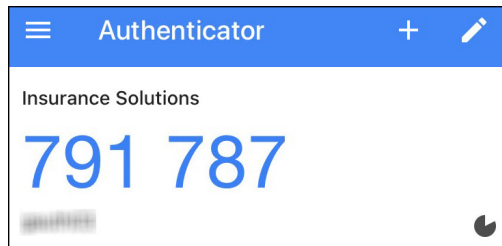
*Once you delete the existing registration, the passcode from that registration becomes invalid, and will no longer work.*



*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:

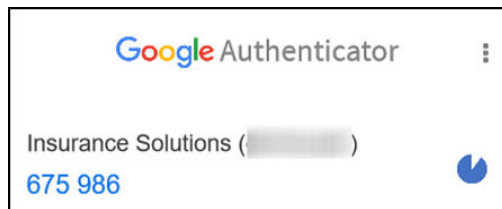
- a. In Google Authenticator, click .



- 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.



- b. Tap **Delete**. 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.

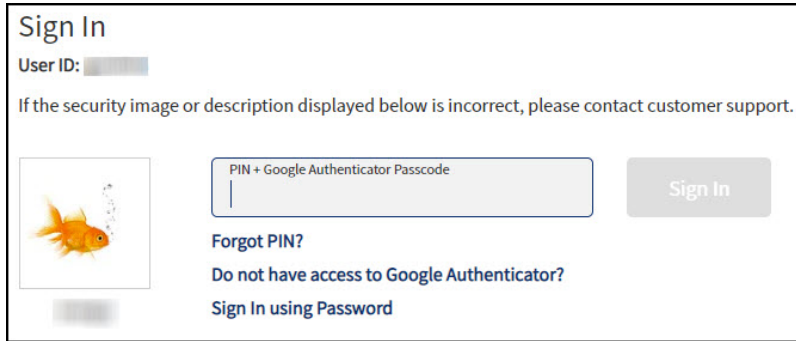


Once you log in, you can change your preferred method of sign-in by clicking the **Account Settings** or **Security Settings** tab on the portal header.

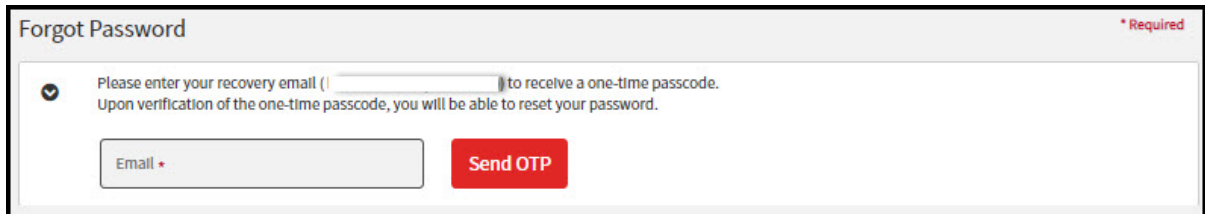
**Procedure:**

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. 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.

