



Wisconsin Office of the  
**COMMISSIONER OF INSURANCE**  
**FINANCIAL REGULATION**

# OCI Financial Portal Security Administration for Business Partners User Guide

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## Overview

This user guide is intended for use by staff designated as a Financial Portal Security Administrator within the company. This user guide describes how to assign and remove role permissions in the Wisconsin Office of the Commissioner of Insurance (OCI) Security Management for Business Partners application.

The following must be completed prior to company staff being able to make an electronic filing to the Division of Financial Regulation:

1. The Financial Portal Security Administrator and the Financial Portal Filer(s) must get a Web Access Management System (WAMS) ID (see below for instructions).
2. Once the Financial Portal Security Administrator has a WAMS ID they are to contact OCI at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov) to be associated with the correct company in the OCI Financial Portal Application.
3. The Financial Portal Security Administrator must then login and add the company's Financial Portal Filer(s) for the company and/or group.

If you need to request Financial Portal Security Administrator privileges, please contact the Financial Portal Security Administrator for your company or contact OCI at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov) to identify who the administrator is for your company. See the [Creating a User Account](#) chapter for instructions on how to create a WAMS user account.

## Roles

There are two types of security roles in the OCI Security Management for Business Partners application.

- Financial Portal Security Administrator – Allows a person to assign/remove roles to other users or themselves for their company or group.
- Financial Portal Filer – Allows a person to file documents/forms for their company/group on the Financial Portal application.

TIP: There can be more than one user in a role for a group or company.

We recommend the Google Chrome browser when using the OCI Security Management for Business Partners application.



## Creating a User Account

Prior to using the OCI Security Management for Business Partners application you will need to have a Web Access Management System (WAMS) user account. Go to <https://on.wisconsin.gov/WAMS/SelfRegController> to register for a WAMS user account. The individual(s) filing documents for the company must also have a WAMS user account for you to add roles for them.

## Associating a User to a Group or Company

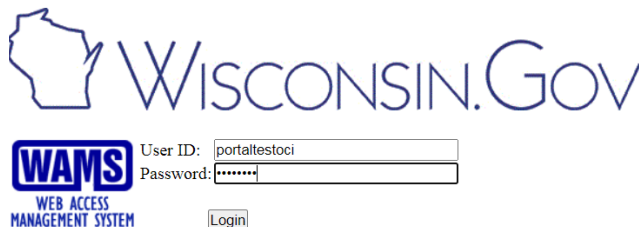
The initial user for a group or company will need to contact OCI at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov) to have your account associated with your company. If your organization has an NAIC group name and number, please make the initial request as the security administrator of the group. Subsequent security administrators and portal filers will be assigned by their group or company security administrator. Please provide the following information in the email request:

- First Name
- Last Name
- Email Address
- WAMS ID
- Phone Number
- Title
- Group Name or Company Name
- NAIC Group Code or NAIC Company Code

The system will send a confirmation email when new permissions are granted.

## Accessing the Application

Once you have been associated with a company, you will access the OCI Security Management for Business Partners application using the following link: <https://trust.oci.wi.gov/security/company>. Notice the login page is part of WAMS. Also, notice the message in red on the screen. **Please do not bookmark this page!**



[Forgot your password? Is your account locked?](#)  
[Request a Wisconsin User ID and Password.](#)



You are about to access a State of Wisconsin computer system. This is a restricted computer system for authorized users only. All equipment, systems, services, and software connected to this system are intended only for official business use of the State of Wisconsin, and may contain U.S. Government information. All data contained on this system is owned by the State of Wisconsin. The State of Wisconsin reserves the right to audit, monitor, record and/or disclose all transactions and data sent over this system in a manner consistent with State and federal law. Use of this system by any user, authorized or unauthorized, constitutes consent to monitoring, recording, reading, copying, or capturing and disclosure of data and transactions by authorized personnel. Only software and/or hardware approved, scanned, and licensed for State of Wisconsin use is permitted on this system. Any illegal, unauthorized use or modification of the State of Wisconsin data, equipment, systems, services, or software by any person(s) is prohibited and may be subject to civil or criminal prosecution under state and/or federal laws.

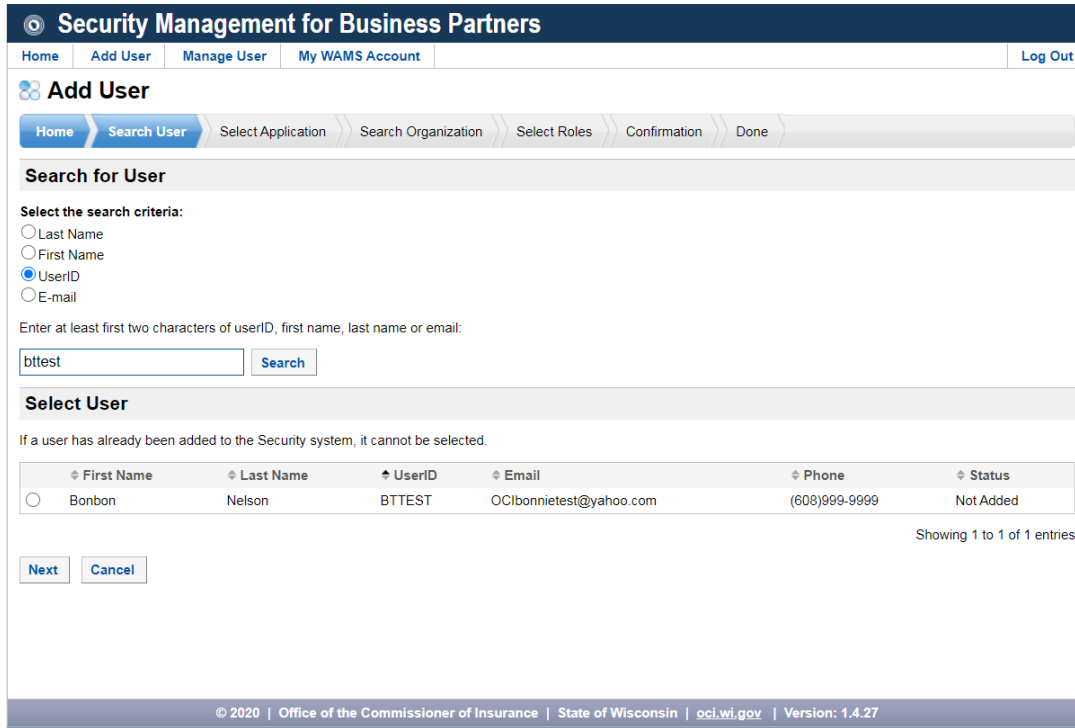
[WAMS Home](#) [Wisconsin Portal Home](#)  
**Please don't bookmark this page.**

Once you log into WAMS using your WAMS ID and password, you will be taken to the OCI Security Management for Business Partners application. If you would like to bookmark the OCI Security Management for Business Partners application, you can do so now.



## Selecting the User

The Financial Portal Security Administrator has two options.  or  when they sign in. Select **Add User** if the user has never been setup in the Security Management application. If you are not sure, select **Add User**. For both options you can search by Last Name, First Name, UserID, or E-mail address.



**Security Management for Business Partners**

Home Add User Manage User My WAMS Account Log Out

**Add User**

Home Search User Select Application Search Organization Select Roles Confirmation Done

**Search for User**

Select the search criteria:

- Last Name
- First Name
- UserID
- E-mail

Enter at least first two characters of userID, first name, last name or email:

**Select User**

If a user has already been added to the Security system, it cannot be selected.

<input type="checkbox"/>	First Name	Last Name	UserID	Email	Phone	Status
<input type="radio"/>	Bonbon	Nelson	BTTEST	OCibonnetest@yahoo.com	(608)999-9999	Not Added

Showing 1 to 1 of 1 entries

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If the user status is "Not Added" you can select the user and click Next to continue. If the user already exists, their status will be "Added" and the select will be disabled. You will need to click Cancel and then select Manage User.

**Reminder:** The user must first have a WAMS account. If you cannot find the user, make sure they have registered for a WAMS account and clicked on the link in the email to activate the account.

Once you have selected the user and clicked Next, continue to the chapter [Selecting the Application](#). The instructions from this point on are the same for adding or managing a user.

## Selecting the Application

The next step is to select the Financial Portal for the application. If you are a security administrator for multiple OCI applications, there will be additional applications listed. However, these instructions are specific to assigning roles for the Financial Portal application. If Financial Portal is not an option, please contact the OCI Financial Portal Application Security Administrator at your company or contact OCI at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov).



## Maintaining Roles

Roles can be assigned to a group or company. The next chapter will cover maintaining roles for a company.

### Maintaining Roles for a Company

Under Select Groups / Company Roles for User, select Other Companies. The list of companies displayed in the Company Roles section are companies where you have been setup as the Financial Portal Security Administrator. Click the + next the company(s) you want to assign roles for the user. If you need to maintain role permissions for a company that is not listed, please contact the OCI Financial Portal Application Security Administrator at your company or contact OCI at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov).

#### TIPS:

- Selecting **Expand All** will display the roles for all companies.
- Selecting **Grant All Filer Role** will give the user the Financial Portal Application Filer role for all companies listed. Use this option cautiously as it could give the user filing privileges to more companies than intended.
- Selecting **Revoke All Filer Role** does just what it sounds like. It will remove the Financial Portal Application Filer role for all listed companies for this user.

The screenshot shows the 'Security Management for Business Partners' interface. The breadcrumb trail is: Home > Add User > Manage User > My WAMS Account > Log Out. The current page is 'Manage User' with a sub-breadcrumb trail: Home > Search User > Select Application > Select Roles > Confirmation > Done. The 'Selected User' section shows a table with one user: Bonnie Tedt (User Id: BTTEST, Email: OCibonnie@yahoo.com, Application: Financial Portal). The 'Select Groups / Company Roles for User' section has a 'Companies' dropdown menu and buttons for 'Previous', 'Next', and 'Cancel'. Below this are three buttons: 'Expand All', 'Grant All Filer Role', and 'Revoke All Filer Role'. A table lists available roles with checkboxes for selection:

Company Roles	Start Date	End Date	Lasts Indefinitely
<input type="checkbox"/> Alphabet Insurance			
<input type="checkbox"/> Dozen Insurance Corp			
<input type="checkbox"/> Green Assurance Corp			
<input type="checkbox"/> Teltech Insurance Company			

To the right of the role selection table is a 'Role Name' and 'Permissions' table:

Role Name	Permissions
Financial Portal Application Filer	Allows a user to file a document through the Financial Portal Application
Financial Portal Application Security Administrator	

Once you expand the appropriate company(s) you can now assign the user a role by clicking the checkbox for the desired role. When adding a role, you can change the Start Date to a future date if you would like to setup the permissions in advance and you can enter an End Date if you know the role is temporary or know the user should not have access after a given date.



To remove a role, you can click to uncheck the role, or you can specify an End Date.

**Selected User**

First Name	Last Name	User Id	Email	Application
bonnie	tiedt	BTTEST	OCIBonnie@yahoo.com	Financial Portal

**Company Roles for User**

COMPANIES

Previous Next Cancel

Expand All Grant All Filer Role Revoke All Filer Role

Company Roles	Start Date	End Date	Lasts Indefinitely
Alphabet Insurance			
<input type="checkbox"/> Financial Portal Application Filer			
<input type="checkbox"/> Financial Portal Application Security Administrator			
Dozen Insurance Corp			
Green Assurance Corp			
<input type="checkbox"/> Financial Portal Application Filer			
<input type="checkbox"/> Financial Portal Application Security Administrator			
Teltech Insurance Company			

Role Name	Permissions
Financial Portal Application Filer	Allows a user to file a document through the Financial Portal Application
Financial Portal Application Security Administrator	

When finished, click Next and continue to the chapter [Confirming Changes](#).

### Maintaining Roles for a Group

Roles can be assigned to a group or company. This chapter covers maintaining roles for a group and/or their associated companies. In the Select Groups / Company Roles for User dropdown, the list of groups displayed are groups where you have been setup as the Financial Portal Security Administrator. Select the group you wish to assign roles for this user.

**TIP:** If you need to maintain role permissions for a group that is not listed, please contact the OCI Financial Portal Application Security Administrator at your company or contact OCI at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov).

You can now assign the user a role for the group by clicking the checkbox next to the role. When adding a role, you can change the Start Date to a future date if you would like to setup the permissions in advance and you can enter an End Date if you know the role is temporary or know the user is leaving.

To remove a role, you can click to uncheck the role, or you can specify an End Date.



When assigning a Group Role, permissions apply for the group level. This does not give the user permissions for companies within the group.

**Security Management for Business Partners**

Home | Add User | Manage User | My WAMS Account | Log Out

**Manage User**

Home | Search User | Select Application | **Select Roles** | Confirmation | Done

**Selected User**

First Name	Last Name	User Id	Email	Application
bonnie	tiedt	BTTEST	OCibonnet@yahoo.com	Financial Portal

**Select Groups / Company Roles for User**

ABC GRP

Previous | Next | Cancel

Group Roles	Start Date	End Date	Lasts Indefinitely	Role Name	Permissions
<input checked="" type="checkbox"/> ABC Assurance Corporation <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Portal Application Filer</li> <li><input type="checkbox"/> Financial Portal Application Security Administrator</li> </ul>				Financial Portal Application Filer	Allows a user to file a document through the Financial Portal Application
				Financial Portal Application Security Administrator	

Expand All | Grant All Filer Role | Revoke All Filer Role

Company Roles	Start Date	End Date	Lasts Indefinitely
<input checked="" type="checkbox"/> ABC Assurance Corporation			
<input checked="" type="checkbox"/> ABC Credit Corporation			
<input checked="" type="checkbox"/> ABC Indemnity Corporation			
<input checked="" type="checkbox"/> ABC Reinsurance Corporation			
<input checked="" type="checkbox"/> ABC Mortgage Corporation			

### Maintaining Roles for Companies within a Group

As previously stated, assigning Group Roles only gives the user permissions to the group. It DOES NOT give permissions to any of the companies in the group.

You can easily assign the Financial Portal Filer role for all companies in the group by using the **Grant All Filer Role** button. Use this option cautiously as it could give the user filing privileges to more companies than intended. Also note that this covers companies currently in the group who are licensed in Wisconsin. The role will not automatically be assigned for companies added to the group in the future.

You can easily remove the Financial Portal Application Filer role for all listed companies by using the **Revoke All Filer Role** button.

To assign roles for only some companies you can use the **Expand All** button to display the roles for all companies. Or you can click **+** for only the companies you wish to administer roles for this user. The list of companies are the companies currently in the group who are licensed in Wisconsin.





You can assign the user a role for the company by clicking the checkbox next to the desired role. When adding a role, you can change the Start Date to a future date if you would like to setup the permissions in advance and you can enter an End Date if you know the role is temporary or know the user is leaving.

To remove a role, you can click to uncheck the role, or you can specify an End Date.

**Security Management for Business Partners**

Home | Add User | Manage User | My WAMS Account | Log Out

**Manage User**

Home | Search User | Select Application | **Select Roles** | Confirmation | Done

**Selected User**

First Name	Last Name	User Id	Email	Application
bonnie	tiedt	BTTEST	OC bonnie@yahoo.com	Financial Portal

**Select Groups / Company Roles for User**

ABC GRP

Previous | Next | Cancel

Group Roles	Start Date	End Date	Lasts Indefinitely	Role Name	Permissions
<input checked="" type="checkbox"/> Financial Portal Application Filer	06/11/2020		<input checked="" type="checkbox"/>	Financial Portal Application Filer	Allows a user to file a document through the Financial Portal Application
<input type="checkbox"/> Financial Portal Application Security Administrator				Financial Portal Application Security Administrator	

Expand All | Grant All Filer Role | Revoke All Filer Role

Company Roles	Start Date	End Date	Lasts Indefinitely
<b>ABC Assurance Corporation</b>			
<input checked="" type="checkbox"/> Financial Portal Application Filer	06/11/2020	06/24/2020	<input type="checkbox"/>
<input type="checkbox"/> Financial Portal Application Security Administrator			
<b>ABC Credit Corporation</b>			
<input checked="" type="checkbox"/> Financial Portal Application Filer	06/11/2020		<input checked="" type="checkbox"/>
<input type="checkbox"/> Financial Portal Application Security Administrator			
<b>ABC Indemnity Corporation</b>			
<input type="checkbox"/> Financial Portal Application Filer			
<input type="checkbox"/> Financial Portal Application Security Administrator			
<b>ABC Reinsurance Corporation</b>			
<input type="checkbox"/> Financial Portal Application Filer			
<input type="checkbox"/> Financial Portal Application Security Administrator			
<b>ABC Mortgage Corporation</b>			
<input type="checkbox"/> Financial Portal Application Filer			
<input type="checkbox"/> Financial Portal Application Security Administrator			

For your convenience the **Previous** **Next** **Cancel** buttons are at the top and bottom of the page.

When finished, click Next and continue to the chapter [Confirming Changes](#).



## Confirming Changes

After you have made your changes and clicked Next, you will be presented a screen displaying your changes.

**Security Management for Business Partners**

Home Add User Manage User My WAMS Account Log Out

**Manage User**

Home Search User Select Application Select Roles Confirmation Done

**Confirm Roles for User**

Review all information. If it is correct, confirm below.

**Selected User**

First Name	Last Name	User Id	Email	Application
bonnie	tiedt	BTTEST	OClbonniet@yahoo.com	Financial Portal

**Updated Roles**

**Alphabet Company**

Financial Portal Application Filer	06/11/2020
------------------------------------	------------

**Green Assurance Corp**

Financial Portal Application Filer	06/11/2020
Financial Portal Application Security Administrator	06/11/2020

Previous Confirm Cancel

*The above screen shot is an example and will vary based on if you were assigning roles at a company or group level.*

If you need to make changes you can press Cancel or Previous.

When finished click  to submit your changes. An email summarizing the changes will be sent to you and the user. The user will be instructed to contact you with any questions.

## Contact Us

Please contact us at [ocifinancial@wisconsin.gov](mailto:ocifinancial@wisconsin.gov) or (608) 266-3585; Option #3 for questions on:

- Obtaining a WAMS User ID
- Getting access to the OCI Security Management for Business Partners application
- Getting access to the OCI Financial Portal application