



# Market Regulatory Reports

## Online User Manual

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## Summary

Market regulatory reports are created and updated online through the Wisconsin **Market Regulatory Reports** and Forms application. This tutorial guides users through the online system for data management. This guide does not provide information about requirements or regulations.

## Site Address

<https://trust.oci.wi.gov/forms/company>

## Account Management

Users require an approved account to create or update data. New users must create an account and receive approval prior to creating or updating data. Existing users will need to sign in to manage their account information.

### WAMS Account Registration

**Required Information:** Users will need to complete the following steps when registering for an account with Wisconsin OCI:

- Create a User ID
- Provide a valid Email Address
- Create a Password
- Provide Contact Name
- Provide Contact Phone Number

### Registration Process

New users must register with Web Access Management System (WAMS) to gain access to the application. See instruction for new user sign up: [on.wisconsin.gov/WAMS/SelfRegController](https://on.wisconsin.gov/WAMS/SelfRegController).

Users receive a confirmation email from WAMS and must **click the link within the email to activate their account**.

### Request Access to Wisconsin Market Regulatory Reports and Forms

Send an email to [ocimrreports@wisconsin.gov](mailto:ocimrreports@wisconsin.gov) including the following information:

- WAMS User ID
- Company's Legal Name(s)
- Company's NAIC CoCode(s)
- User's Complete Name
- Valid Email Address
- Contact Phone Number

- Security Role(s) Requested (may request Security Administrator/Form Administrator and Form Submitter)
  - Security Administrator/Form Administrator – Allows a person to assign other users as Form Submitter for their company and assign the Form Submitter to forms for their company.
  - Form Submitter – Allows a person to enter data to a form, save, or submit for their company.

OCI will confirm via email that the requested Security Role(s) were granted for Wisconsin Market Regulatory Reports and Forms.

After OCI confirmation email is received, Form Submitters should provide the Security/Form Administrator with their WAMS User ID.

Accessing the Wisconsin Market Regulatory Reports and Forms Application – **CHROME WEB BROWSER MUST BE USED**

Log into <https://trust.oci.wi.gov/forms/company> and provide User ID and password.

- For Security Administrator/Form Administrators
  - If you are a Security/Form Administrator for more than one company, you will need to select a company either by company name or NAIC Co Code (ID).
  - The data reporting forms assigned to your company(s) will appear in the Assign Forms section of the Forms for Companies dashboard.
  - You must designate the Form Submitter for each form assigned to your company(s).
  - If the Form Submitter assigned to the form for the previous reporting year is no longer responsible to complete that form, you can assign a new Form Submitter via the dropdown.
  - You must save all assignment of forms (bottom left of the page).
  
- For Form Submitters
  - If you are a Form Submitter for more than one company, you will need to select a company either by company name or NAIC Co Code (ID).
  - The data reporting forms assigned to the Form Submitter by the Security Administrator/Form Administrator will appear in the My Forms section of the Forms for Companies dashboard

## Reporting

- Form Submitter tips
  - To access the application, the required Browser is Chrome.
  - Review the Instructions for each form assigned to you before starting to enter data.
  - To print the form, the pop-up blocker must be off.
  - The Save and Finish Later feature takes you back to Dashboard with message that form has been saved.
  - To submit the form after Review/Print, close the window or tab to return to the form.

## Contact Us

Email [ocimreports@wisconsin.gov](mailto:ocimreports@wisconsin.gov). The email should include the company's legal name and NAIC Company Number.