Introduction to Company Instructions

The Wisconsin OCI Financial Filing Portal application is composed of three components and users must complete three steps to submit filings: 1) Obtain a WAMS ID, 2) Request permissions for your WAMS ID, 3) Login to the OCI Financial Filing Portal and upload documents.

1) Start by getting your login ID setup. The first step is the Web Access Management System or WAMS. This website handles the user ID, password maintenance and authentication for most Internet-facing services for the State of Wisconsin. If you already have a WAMS user account, the OCI Financial Filing Portal can use your existing login. If you do not have a WAMS ID already, please go to https://on.wisconsin.gov to obtain a WAMS ID through self-registration.

2) After you have your WAMS ID, you will need permissions for your WAMS ID to access the OCI Financial Filing Portal.

   The initial user for any organization, group or company, must request access to the OCI Financial Filing Portal application by email to ocifinancial@wisconsin.gov. If your organization has an NAIC group name and number, please make the initial request as the security administrator of the group. 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.

   The initial user will become a security administrator for the group or company, and they will grant subsequent access requests for their organization using the OCI Security Management website.

   The OCI Security Management for Business Partners application is used to delegate and administer user permissions for both the OCI Security Management for Business Partners application and for the OCI Financial Filing Portal. The link for the OCI Security Management for Business Partners application is https://trust.oci.wi.gov/security/company.

3) Once permissions are set for your WAMS ID, then you can logon to the OCI Security Management for Business Partners application to administer WAMS IDs for your company, or you can logon to the OCI Financial Filing Portal to upload documents for quarterly filings. Access the OCI Financial Filing Portal at https://trust.oci.wi.gov/portal.