

## Instructions for Corporations to Complete Annual Filings Using the Online Portal

Open the email from Council sent April 15, 2019, which contains your login and temporary password. If you did not receive this email, call 604-688-0321 and press 6 at the prompt.

Login into your [online account](#) and click on My Records.

Agencies have the ability to pay for their filings [online via credit card](#) or by [submitting a cheque](#) to Council's office. Online is the preferred method, as the filing fee is processed immediately. General insurance agencies and insurance adjuster firms can have their employees submit their filing declaration online individually but select that their agency will pay the filing fee. Agencies can then download a list of licensees and submit this list with a cheque (this replaces the traditional filing fee per individual licensee); **however, if you are paying by cheque and not paying online, a filing form will still be required for the agency's annual filing.**

### To Pay for Corporate Filing and Licensees Via Credit Card:

**Step 1:** Review the Action column for licensees listed.

**Step 2:** Click "Renew Licence" for the corporate licence record.

**Step 3:** Click "Continue Application."

**Step 4:** Read the declaration, click the checkbox to agree to the declaration, and click "Continue Application."

**Step 5:** Click "Check Out."

**Step 6:** To add additional filing fees, click "Continue Shopping."

**Step 7:** Click on "Pay Fee Due for Renewal" for the licensee that you wish to renew and then click "Check Out." Repeat this step for each individual licensee until you've added the fees to the cart for each one.

**Step 8:** Click "Checkout." You will then be redirected to Moneris' site where you will enter your payment information.

**Step 9:** Text will display to indicate that your filing has been successfully submitted. Click on "View Receipt" to retain a receipt for each payment for your records.

**Step 10:** Click on "My Records" to verify that each licence record's next filing date has been updated to 06/01/2020.

## To Pay for Corporate Filing and Licensees Via Cheque

**Step 1:** Select all licences for which the agency will be paying the filing fees and then click “Download Results.”

**Step 2:** If required, cross-check this list against the Licensee List available from the [Agency Directory](#) to verify that all of the individuals authorized to represent your agency are included in this list. The “Next Filing Date” is listed in the Licensee List and this should be used to verify that the agency is only paying for licensees that are required to file this year and have not already submitted their annual filings.

**Step 3:** Submit the list of licences, a paper filing form for the agency only, and a cheque to Council’s office. Filing fees must be received in Council’s office by end of business day on Monday June 3, 2019, or a late filing fee will be required.

**IMPORTANT NOTES:** The list that is downloaded from the online portal **MUST** be submitted with the cheque. Council will only process payments for licensees that have completed the online declaration. If an individual licensee has not completed the online declaration, a filing form must be submitted in lieu of an online declaration. If the licensee has submitted an online declaration, a filing form is not required. Council’s system is not currently supporting submission of an agency declaration without the payment portion as well; therefore, **agencies paying the agency filing fee by cheque must provide a paper filing form for the agency.**

**Step 4:** Check the [Licensee Directory](#) to verify that your cheque has been received and processed in Council’s office. When the next filing date for each licence has been updated to 06/01/2020, your cheque has been processed.

**NOTE:** Due to the volume of payments received in Council’s office, licensees are encouraged to file early and file online. Depending on the volume of cheque payments received in Council’s office, it may take up to 10 business days from the date received for the next filing date to be updated on Council’s website. Council is also not responsible for delivery delays on payments submitted to Council’s office that are outside its control.

Log into the corporate account using the login and temporary password provided in the email from Council sent April 15, 2019. If you did not receive this email, call 604-688-0321 and press 6 at the prompt or send an email to [filingsupport@insurancecouncilofbc.com](mailto:filingsupport@insurancecouncilofbc.com). Click on My Records.

# Insurance Council

BRITISH COLUMBIA

Logged in as: [REDACTED] Collections (0)  Cart (0) Account Management Logout

Home Licences

Dashboard My Records My Account

Hello, [REDACTED]

Saved in Cart (0)

[View Cart](#)

There are no items in your shopping cart right now.

My Collection (0)

[View Collections](#)

You do not have any collections right now.

Work in progress 

[View All Records](#)

Record Name	Record ID	Module	Creation Date	Action
No records found				

## Option 1: Pay All Fees Online Via Credit Card or Debit

**Insurance Council**  
BRITISH COLUMBIA

Option 1:  
Pay via credit card

Logged in as [redacted] Collections (0)  Cart (0) Account Management Logout

**Home** Licences

Dashboard **My Records** My Account

▼ Licences

Individual licensees listed are those who have completed their online declaration and have selected "My agency will pay." Click "Renew License" for the corporate licence to proceed to the payment page and/or click "Pay Fee Due for Renewal" for each licensee listed. Each licensee must be renewed individually, but the payments can be processed in one transaction.

Showing 1-6 of 6 | [Download results](#) | [Add to collection](#) | [Add to cart](#)

<input type="checkbox"/>	Record Number	Record Type	Licensee Name	Action	Next Filing Date	Status
<input type="checkbox"/>	LIC [redacted]	General Licence - Individual	[redacted]	Pay Fee Due for Renewal	06/01/2019	Active
<input type="checkbox"/>	LIC [redacted]	General License - Corporate	[redacted]	Renew License	06/01/2019	Active

**Step 1:**

Review the Action column for the licences listed.

- “Pay Fee Due for Renewal” indicates that the individual has completed the online declaration and indicated that “My Agency will pay” for the fees. The agency can proceed with the annual filing for this licensee.
- “Resume Renewal” indicates that the annual filing is in progress, but that the declaration has not been completed. The agency will not be able to submit the filing fee until the licensee has completed the declaration online.
- Blank (and the next filing date is noted as 06/01/2020). This individual has either already submitted their annual filing or is a new licensee and the first filing date is next year.
- “Renew License” indicates that this licensee has not yet started their annual filing through the online portal.

▼ Licences

Showing 1-6 of 6 | [Download results](#) | [Add to collection](#) | [Add to cart](#)

<input type="checkbox"/>	Record Number	Record Type	Licensee Name	Action	Next Filing Date
<input type="checkbox"/>	LIC	General Licence - Individual		Pay Fee Due for Renewal	06/01/2019
<input type="checkbox"/>	LIC	General License - Corporate		Resume Renewal	06/01/2019
<input type="checkbox"/>	LIC	General Licence - Individual			06/01/2020
<input type="checkbox"/>	LIC	General Licence - Individual		Renew License	06/01/2019
<input type="checkbox"/>	LIC	General Licence - Individual		Renew License	06/01/2019
<input type="checkbox"/>	LIC	General Licence - Individual		Renew License	06/01/2019

Annotations:

- Green box: Fees can be paid; declaration has been completed. (points to 'Pay Fee Due for Renewal')
- Yellow box: Not yet ready to download; declaration in progress. (points to 'Resume Renewal')
- Purple box: This licensee has already completed their annual filing. (points to '06/01/2020')
- Red box: Do not download; declaration not yet started. (points to 'Renew License')

## Step 2:

The Nominee is required to submit an annual filing and filing fee for the corporate licence. Click “Renew License” on the line item for the corporate licence.

# Insurance Council

BRITISH COLUMBIA

Logged in as: [REDACTED] Collections (0)  Cart (0) Account Management Logout

**Home** Licences

Dashboard **My Records** My Account

### ▼ Licences

Showing 1-6 of 6 | [Download results](#) | [Add to collection](#) | [Add to cart](#)

<input type="checkbox"/>	Record Number	Record Type	Licensee Name	Action	Next Filing Date	Status
<input type="checkbox"/>	LIC-[REDACTED]	General Licence - Individual	[REDACTED]	Pay Fee Due for Renewal	06/01/2019	Active
<input type="checkbox"/>	LIC-[REDACTED]	General License - Corporate	[REDACTED]	Renew License 	06/01/2019	Active

### Step 3:

Review the agency's contact information and update, if necessary. Click "Continue Application."

# Insurance Council

BRITISH COLUMBIA

Logged in as [redacted] Collections (0)  Cart (0) Account Management Logout

Home Licences

Dashboard My Records My Account

#### Corporate Licence Filing

1 Filing	2 Review	3 Pay Fees	4 Record Issuance
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#### Step 1: Filing > Filing Information

\* indicates a required field.

#### Licensee

Please review the contact information on file for your Licence record. If any changes are required, please update by clicking the 'Account Management' link at the top of the page before proceeding with your filing.

Home phone:  
Mobile Phone:  
Work Phone:  
[Edit](#)

Review contact information and update if necessary.

#### ▼ Contact Addresses

To add a new contact address, click the Add Contact Address link. To edit a contact address, click the Edit link. To remove one of your addresses from this application, click on the Remove link.

Showing 1-2 of 2

	Address Type	Recipient	Address	Action
	Business Address		[redacted]	
	Service Address		[redacted]	

#### Filing Options

FILING

[Continue Application »](#)

[Save and resume later](#)

## Step 4:

Read the declaration, click the checkbox to agree to the declaration, and click “Continue Application.”

Logged in as [redacted] Collections (0)  Cart (0) Account Management Logout

**Home** **Licences**

Dashboard My Records My Account

### Corporate Licence Filing

1 Filing	2 Review	3 Pay Fees	4 Record Issuance
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### Step 2: Review

[Continue Application »](#) [Save and resume later](#)

Please review all information below. Click the “Edit” buttons to make changes to sections or “Continue Application” to move on. You must check the box to agree to the declaration at the bottom of the page before you can continue.

### Record Type

Corporate Licence Filing

### Licensee

[Edit](#)

Organization [redacted] Home Phone [redacted]

### Filing Options

**FILING** [Edit](#)

In making this annual filing, I confirm that I am in compliance with all Council Rules, which may include, but are not limited to, requirements relating to mandatory errors and omissions insurance, authority to represent at least one insurer, all mandatory disclosures to Council, and continuing education.

By checking this box, I agree to the above declaration. Date: 04/12/2019

[Continue Application »](#) [Save and resume later](#)

## Step 5:

On the Pay Fees screen, click “Check Out.”

Logged in as: [REDACTED] Collections (0)  Cart (0) Account Management Logout

**Home** Licences

Dashboard My Records My Account

### Corporate Licence Filing

1 Filing	2 Review	3 Pay Fees	4 Record Issuance
----------	----------	------------	-------------------

### Step 3 : Pay Fees

Listed below are the license application fees based upon the information you've entered.

#### Application/Renewal Fees

Fees	Qty.	Amount
Annual Filing	1	\$200.00
Annual Filing - Provincial Government License Fee	1	\$25.00

**TOTAL FEES: \$225.00**

Note: This does not include additional fees which may be assessed later.

**Check Out »**



## Step 6:

The filing fee has been added to the cart. To add the fees for the licensees authorized to represent the agency, click “Continue Shopping.”

Logged in as [redacted] Collections (0)  Cart (1) Account Management Logout

**Home** Licences

Dashboard My Records My Account

### Cart

1 Select item to pay	2 Payment information	3 Receipt/Record issuance
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### Step 1: Select item to pay

Click on the arrow in front of a row to display additional information. Items can be saved for a future checkout by clicking on the Save for later link.

### PAY NOW

1 Application(s) | \$225.00

▶ General License - Corporate

Total due: \$225.00

**Total amount to be paid: \$225.00**

Note: This does not include additional inspection fees which may be assessed later.

Checkout »

Edit Cart »

Continue Shopping »



## Step 7:

From the My Records screen, click on “Pay Fee Due for Renewal” for the licensee that you wish to renew and then click “Check Out.” Repeat this step for each individual licensee until you’ve added the fees to the cart for each one.

**Home** Licences

Dashboard **My Records** My Account

### ▼ Licences

Showing 1-6 of 6 | [Download results](#) | [Add to collection](#) | [Add to cart](#)

<input checked="" type="checkbox"/>	Record Number	Record Type	Licensee Name	Action	Next Filing Date	St
<input checked="" type="checkbox"/>	LIC [REDACTED]	General Licence - Individual	[REDACTED]	<a href="#">Pay Fee Due for Renewal</a>	06/01/2019	Act
<input checked="" type="checkbox"/>	LIC [REDACTED]	General License - Corporate	[REDACTED]	<a href="#">Resume Renewal</a>	06/01/2019	Act

Logged in as [REDACTED] Collections (0)  Cart (1) [Account Management](#) [Logout](#)

**Home** Licences

Dashboard My Records My Account

Listed below are the license application fees based upon the information you've entered.

#### Application/Renewal Fees

Fees	Qty.	Amount
Annual Filing	1	\$200.00
Annual Filing - Provincial Government Licence Fee	1	\$25.00

**TOTAL FEES: \$225.00**

Note: This does not include additional fees which may be assessed later.

**Check Out »**

## Step 8:

When all of the licences you wish to pay the annual filing fee for are in the cart, click “Checkout.” You will then be redirected to Moneris’ site where you will enter your payment information.

Logged in as [redacted] Collections (0)  Cart (2) Account Management Logout

**Home** Licences

Dashboard My Records My Account

### Cart

1 Select item to pay	2 Payment information	3 Receipt/Record issuance
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### Step 1: Select item to pay

Click on the arrow in front of a row to display additional information. Items can be saved for a future checkout by clicking on the Save for later link.

### PAY NOW

#### 2 Application(s) | \$450.00

▶ General Licence - Individual	Total due: \$225.00
▶ General License - Corporate	Total due: \$225.00

**Total amount to be paid: \$450.00**

Note: This does not include additional inspection fees which may be assessed later.

[Checkout »](#)

[Edit Cart »](#)

[Continue Shopping »](#)

## Step 9:

Upon successful completion of payment, you may receive an email from Moneris and then you will be redirected back to your online portal account. You will see text confirming that your filing has been successfully submitted and you can click on “View Receipt” to retain a receipt for each payment for your records.

Logged in as: [blurred] Collections (0)  Cart (0) Account Management Logout

**Home** Licences

Dashboard My Records My Account

1 Select item to pay	2 Payment information	3 Receipt/Record issuance
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### Step 3: Receipt/Record issuance

#### Receipt



Your application(s) has been successfully submitted.  
Please print your record(s) and retain a copy for your records.

[Print/View Receipt](#)

FIL-2019-00108

[View Receipt](#)

FIL-2019-00109

[View Receipt](#)

[Print/View Receipt](#)

**Step 10:**

Click on “My Records” to verify that each licence record’s next filing date has been updated to 06/01/2020. This information is also automatically updated on the [Licensee Directory](#).

**Home** Licences

Dashboard **My Records** My Account

▼ Licences

Showing 1-6 of 6 | [Download results](#) | [Add to collection](#) | [Add to cart](#)

<input type="checkbox"/>	Record Number	Record Type	Licensee Name	Action	Next Filing Date	Status
<input type="checkbox"/>	LIC [REDACTED]	General Licence - Individual	[REDACTED]	[REDACTED]	06/01/2020	Active
<input type="checkbox"/>	LIC [REDACTED]	General License - Corporate	[REDACTED]	[REDACTED]	06/01/2020	Active

## Option 2: Pay All Fees Via Cheque

### Step 1:

Select all licences for which the agency will be paying the filing fees and then click “Download Results.”

**Insurance Council**  
BRITISH COLUMBIA

Option 2:  
Pay via cheque

Logged in as [REDACTED] Collections (0)  Cart (0) Account Management Logout

Home Licences

Dashboard **My Records** My Account

▼ Licences

The agency can download a list of licensees who have completed the online declaration, which can be printed and sent with a cheque.

Showing 1-6 of 6 | [Download results](#) | [Add to collection](#) | [Add to cart](#)

<input checked="" type="checkbox"/>	Record Number	Record Type	Licensee Name	Action	Next Filing Date	Status
<input checked="" type="checkbox"/>	LIC [REDACTED]	General Licence - Individual	[REDACTED]	Pay Fee Due for Renewal	06/01/2019	Active
<input checked="" type="checkbox"/>	LIC [REDACTED]	General License - Corporate	[REDACTED]	Renew License	06/01/2019	Active

**Step 2:**

If required, cross-check this list against the Licensee List available from the [Agency Directory](#) to verify that all of the individuals authorized to represent your agency are included in this list. The “Next Filing Date” is listed in the Licensee List and this should be used to verify that the agency is only paying for licenses that are required to file this year and have not already submitted their annual filings.

# Insurance Council

BRITISH COLUMBIA

Licensee List

## AGENCY PROFILE

Agency Name: [REDACTED]

Licence Number: [REDACTED]

Licence Type: Life License - Corporate

Licence Status: Active

Effective Date: 2015/Aug/19

Next Filing Date: 2019/Jun/01

Termination Date:



## NOMINEE(S)

	A	B	C	D	E	F	G
	Licensee First Name	Licensee Middle Name	Licensee Last Name	ATR Level	Employee Licence Number	License Status	Next Filing Date
1				Salesperson Level 1		Active	2019/Jun/01
2				Agent Level 2		Active	2019/Jun/01
3				General Salesperson Level 1		Active	2019/Jun/01
4				Salesperson Level 1		Active	2019/Jun/01
5				General Salesperson Level 1		Active	2019/Jun/01
6				General Salesperson Level 1		Active	2019/Jun/01
7				Salesperson Level 1		Active	2019/Jun/01
8				Salesperson Level 1		Active	2019/Jun/01
9				Agent Level 2		Active	2019/Jun/01
10				Agent Level 2		Active	2019/Jun/01
11				Agent Level 2		Active	2019/Jun/01
12				Agent Level 2		Active	2019/Jun/01
13				Salesperson Level 1		Active	2019/Jun/01
14				Agent Level 2		Active	2019/Jun/01
15							

**Step 3:**

Submit the list of licences, a paper filing form for the agency, and a cheque to Council's office. Filing fees must be received in Council's office by end of business day on Monday June 3, 2019, or a late filing fee will be required.

**IMPORTANT NOTES:** The list that is downloaded from the online portal **MUST** be submitted with the cheque. Council will only process payments for licensees that have completed the online declaration. If an individual licensee has not completed the online declaration, a filing form must be submitted in lieu of an online declaration. If the licensee has submitted an online declaration, a filing form is not required. Council's system is not currently supporting submission of an agency declaration without the payment portion as well; therefore, **agencies paying the agency filing fee by cheque must provide a paper filing form for the agency.**

**Step 4:**

Check the [Licensee Directory](#) to verify that your cheque has been received and processed in Council's office. When the next filing date for each licence has been updated to 06/01/2020, your cheque has been processed.

**NOTE:** Due to the volume of payments received in Council's office, licensees are encouraged to file early and file online. Depending on the volume of cheque payments received in Council's office, it may take up to 10 business days from the date received for the next filing date to be updated on Council's website. Council is also not responsible for delivery delays on payments submitted to Council's office that are outside its control.