



Portal

System User's Guide (External)

Version Issue: Version 1.9

Last Update: 06/15/2022

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General Information

The North Carolina Rate Bureau (NCRB), the North Carolina Reinsurance Facility (NCRF) and the North Carolina Insurance Guaranty Association (NCIGA) have implemented a web security portal, hereinafter referred to as the Portal, by which all users must enter a user id and password to access secured applications and data. The Portal is a self-service tool that allows users to submit a request for a new account, to change a password and to request a forgotten password.

Administrators will have access to a Web Administration application that will allow them to maintain user demographic information, administer security for applications and data and execute system reports. Users will not be able to access an application on the Portal unless they have been granted access by an administrator using the Web Administration application.

About This Guide

This User's Guide contains features, functions, and step-by-step instructions on how to use the Portal application. This User's Guide will enable you to:

- Request a New Web Account
- Login to the Portal
- Change your Password
- Request a Forgotten Password
- Request Access and Launch an Application

NOTE: See the Web Security User Guide – External Admin.doc for instructions on how to use the Web Administration application.

NCRB, NCRF and NCIGA Information Center

If at any time during these procedures you need assistance, you may contact the NCRB, NCRF and NCIGA Information Center at:

Phone: 919-582-1056
Fax: 919-783-7467
E-mail: support@ncrb.org



Browser Specifications

A browser is a program that allows you to access pages on the World Wide Web. The Portal and Web Administration applications have been tested and certified working for the Chrome browser. Other browser such as IE11, Firefox, Opera, Netscape and MS EDGE are not supported at this time.

You can download the latest version of Chrome free of charge at

<https://www.google.com/chrome/>

Cookies

A cookie is a text-only string that gets entered into the memory of your browser. If the lifetime of this value is set to be longer than the time you spend at a site, this string is saved for future reference.

A **standard cookie** is written to the user's hard drive and is used to remember the user the next time the user visits the site. A **session cookie** resides in the web browser's memory and only retains information until all user browsers are closed and the session is thus ended.

The NCRB Web site uses **session** cookies. The NCRB Web site does not write any data to the user's hard drive. The exception to this is if a user selects to download a file from one of the applications.

Spawning New Windows

Some pages on the NCRB Web site spawn a window (open a new browser window) when they are accessed. For example, when you view a report, you are spawning a new window. Remember to close the new window whenever you want to exit it and return to where you were in the NCRB Web site.

Pop-up Blockers

If you have a pop-up blocker installed, you will need to allow pop-ups from the Portal. If you do not have a pop-up blocker installed, you can skip to the next section.

By default, Google Chrome blocks pop-ups from automatically showing up on your screen. When a pop-up is blocked, the address bar will be marked Pop-up blocked . You can also decide to allow pop-ups. To allow pop-ups from the Portal using Chrome, follow these steps:

- Step 1.** On your computer, open Chrome .
- Step 2.** Go to the page in the Portal where pop-ups are blocked.
- Step 3.** Click the link for the *webportal.ncrb.org* pop-up you want to see.
- Step 4.** To always see pop-ups for the Portal site, select **Always allow pop-ups and redirects from [webportal.ncrb.org]** and then **Done**.

Alternatively, you can allow pop-ups from the Portal using Chrome by following these steps:

- Step 1.** On your computer, open Chrome .
- Step 2.** At the top right, click  and then **Settings**.
- Step 3.** Click **Privacy and security** and then **Site Settings**.
- Step 4.** Click **Pop-ups and redirects**.
- Step 5.** Under "Allowed to send pop-ups and use redirects," click **Add**.
- Step 6.** Enter the Portal site's web address, *webportal.ncrb.org* and then click **Add**.

System Timeout

The System times out after it has been inactive for sixty minutes or more. The following message displays, informing you to re-log into the System.

Figure 1-4: Session Expired Page

The screenshot displays the 'Session Expired' page of the NCRB-NCRF-NCIGA Application Portal. On the left, there is a vertical sidebar with the text 'APPLICATION PORTAL' and a date '7/24/2018'. The main content area features the NCRB-NCRF-NCIGA logo at the top, followed by the text 'NCRB • NCRF • NCIGA'. A red error message states 'Error : Session has expired.' A callout box labeled 'Session Expired Message' points to this message. Below the error, the 'Logon' section explains that web applications are only accessible to authorized personnel and provides links for 'Need a Logon Account?' and 'Already have a Logon Account?'. The 'Logon' form includes fields for 'Logon ID*' and 'Password*', a 'Logon' button, and a 'Forgot Your Password?' link. At the bottom, contact information and copyright details are provided.

Session Expired Message

Error : Session has expired.

Logon

Web Applications can only be accessed by authorized personnel. Access requires a secure logon before any reports or functions can be accessed. Users of the system must first be authorized.

Need a Logon Account?

Click [New Account Instructions](#) if you need a new account setup for accessing web applications.

Already have a Logon Account?

Enter your **Logon ID** and **Password** below and click **Logon** to continue. The * indicates fields that are required.

Enter Logon Information

Logon ID*

Password*

Forgot Your Password?

Click [here](#) to request a new Password.

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Accessing and Using the Portal

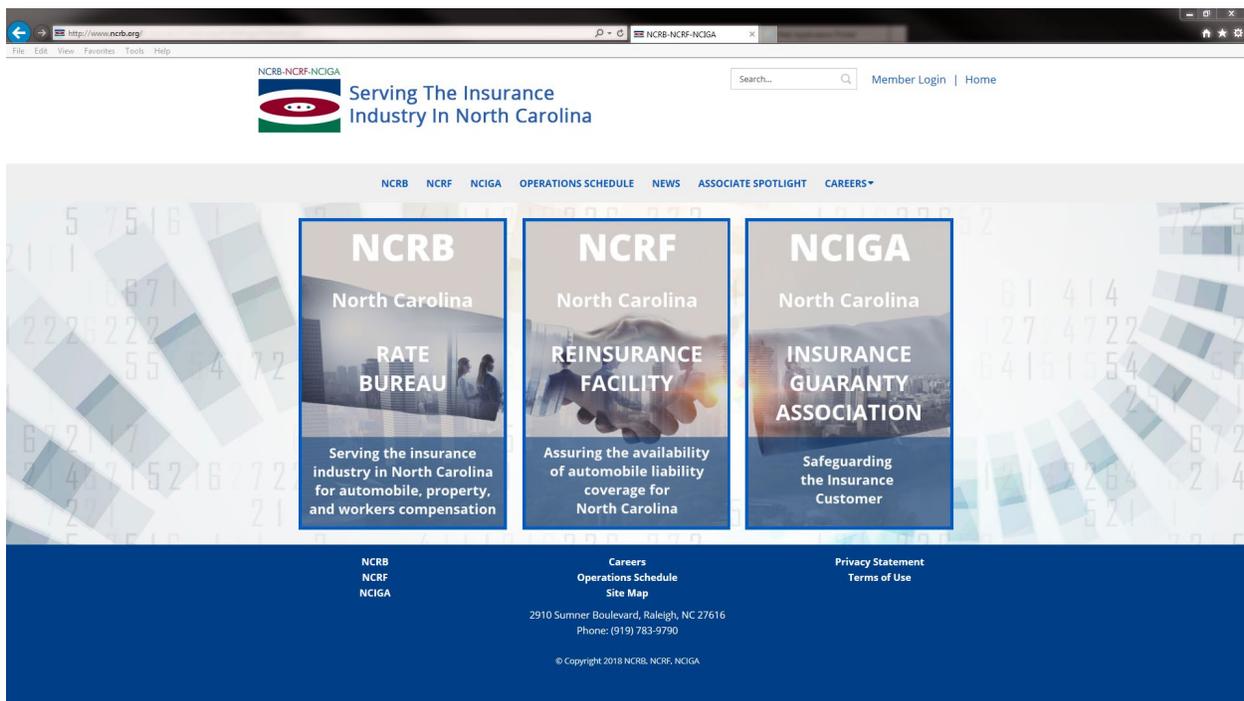
This module contains information and procedures on accessing the Portal and using the Portal features.

View the NCRB, NCRF and NCIGA Home Page

The NCRB, NCRF and NCIGA home page is a public Web site page that allows users to view general information. To access the home page, use the following procedure:

- Step 1.** Type the following URL into your browser's address bar: www.ncrb.org and press the **ENTER** key.

Figure 1-5: NCRB, NCRF and NCIGA Web Site Home Page



Who is your Master Web Administrator (MWA) or Web Administrator (WA)?

The Web Administration application provides the NCRB, NCRF and NCIGA the ability to delegate user administration to its member companies, agencies, premium finance companies and vendors. These delegated administrators are referred to as the Master Web Administrator (MWA) for a company. One MWA will be set up for each company, agency, premium finance company or vendor that would like to conduct business with the NCRB, NCRF and/or NCIGA. Once a MWA account has been created, the MWA will have the ability to maintain user accounts and security access.

If you do not know if your company has a Master Web Administrator or a Web Administrator, contact the NCRB, NCRF and NCIGA Information Center for assistance.

Request a New Logon ID

In order for you to log into the Portal, you must have an active user id and password. A company's MWA is responsible for creating and disabling user accounts for their company. The **Web Administrator Web Account Registration Form** provides the ability for a company to request creation of a MWA account.

If you do not have a MWA already set up for your company, follow these procedures:

- Step 1.** Click the **NCRB** menu on the NCRB, NCRF, NCIGA Home page. You are navigated to the NCRB home page.
- Step 2.** On the right hand side of the page in the Member Services area, click the **New Account Signup - [Instructions](#)** hyperlink. Read through the contents and click the Web Admin Application hyperlink for either Insurance Agents, Agencies and Premium Finance Companies or Member Insurance Companies based upon your company type. The Web Administrator Web Account Registration page is displayed.
- Step3.** Complete the online registration form, filling in the required information, and click Submit. Once the MWA account is created, the MWA will receive an e-mail notification indicating that the account is activated.

Log in to the Portal

The Portal will provide access to all of the secured applications and data on the NCRB, NCRF and NCIGA Web site. To log in to the Portal, use the following procedure. (You must use the valid user name and password that were provided to you.)

- Step 1.** In the Member Services section of the NCRB website, , click the Login hyperlink. The **PORTAL LOGON** page displays.

Figure 1-8: Portal Logon page

The screenshot shows the 'PORTAL LOGON' page. At the top left is the NCRB-NCRF-NCIGA logo. The main header area contains the text 'NCRB • NCRF • NCIGA'. Below this, the word 'Logon' is displayed in a large font. A paragraph of text explains that access to web applications requires a secure logon. There are three main sections: 'Need a Logon Account?' with a link to 'New Account Instructions', 'Already have a Logon Account?' with instructions to enter Logon ID and Password, and 'Forgot Your Password?' with a link to request a new password. The 'Enter Logon Information' section contains two input fields for 'Logon ID*' and 'Password*', and a blue 'Logon' button. A box labeled 'Logon' with an arrow points to the button. At the bottom, there is contact information and copyright notices.

- Step 2.** Enter your Logon ID and password. Click the **LOGON** button. The **PORTAL HOME** page displays.

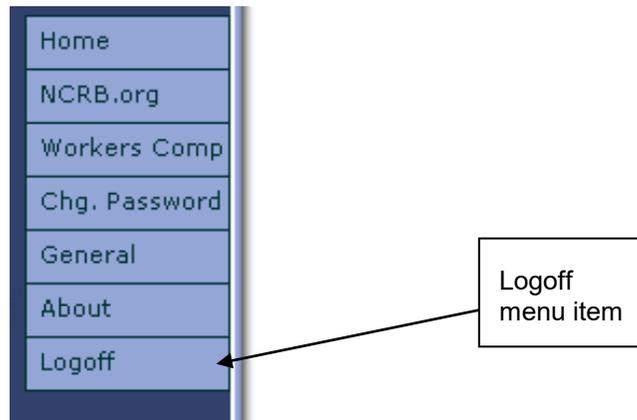
Note: If you enter an incorrect user name or password, the system will return an error message to inform you of the invalid data. Re-enter your user name and password correctly, and click the **SUBMIT** button to enter the system.

Log off of the Portal

To log off from the Portal, click the **LOGOFF** menu item in the Portal.

Note: You may also log off of the system by closing your browser window.

Figure 1-9: Portal Home Menu List

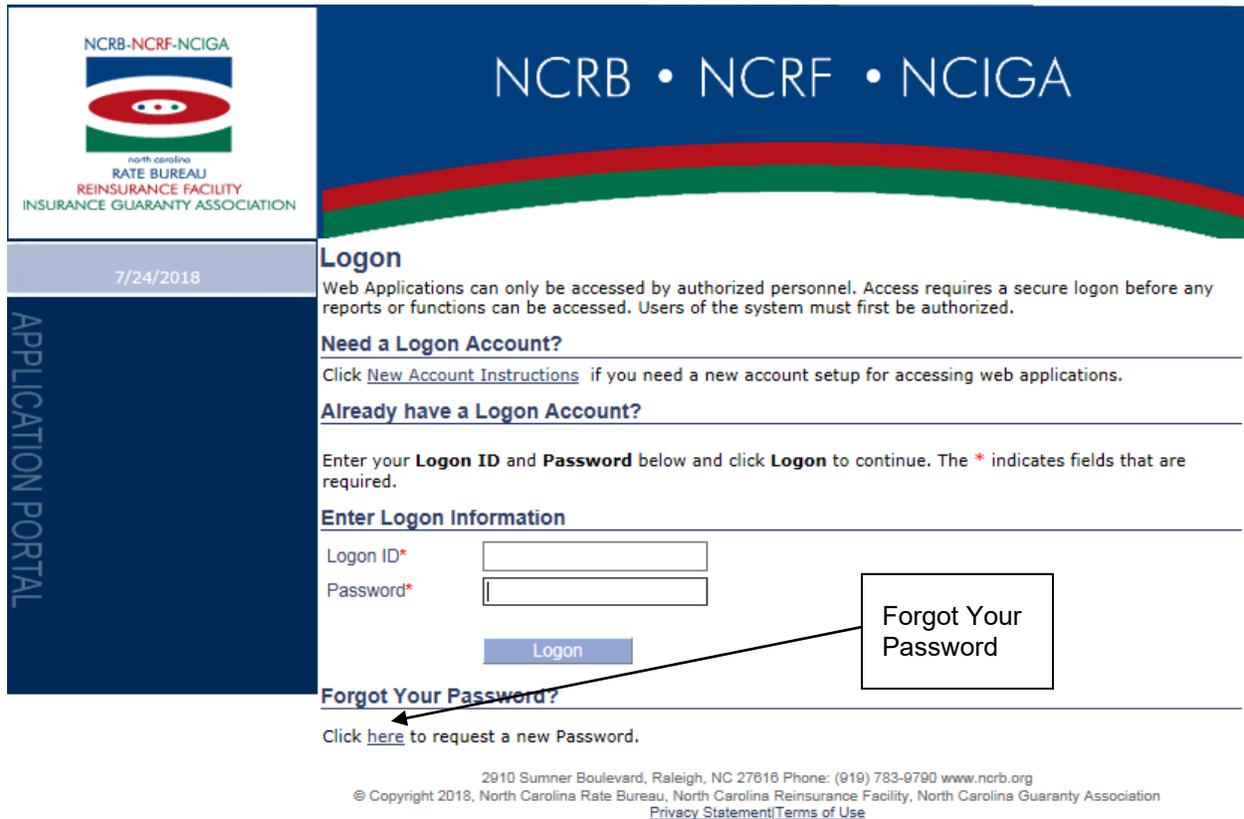


Obtain a Forgotten Password

If you have forgotten your password, you can request a new password by entering your Logon ID and E-mail address. To obtain a new password to gain entry into the Portal, use the following procedures:

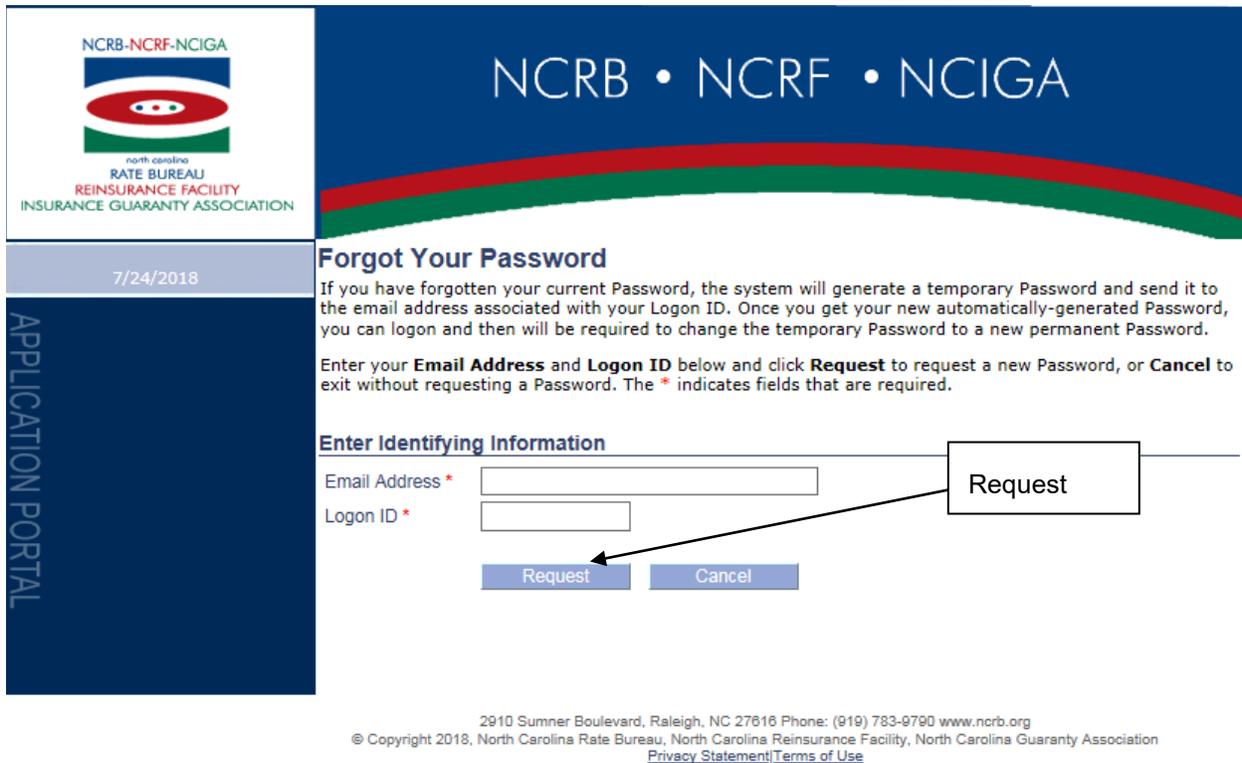
- Step 1.** On the **PORTAL LOGIN** page, click the link in the Forgot Your Password section of the page. The **FORGOT YOUR PASSWORD** page displays.

Figure 1-10: Portal Login Page, Forgot Your Password Link



- Step 2.** Enter your **Email Address** and **Logon ID**.
- Step 3.** Click the **REQUEST** button. An e-mail containing your new password will be sent to your e-mail address.

Figure 1-11: Forgot Your Password Page



Note: Your password is stored encrypted and the system is unable to e-mail your original password. As a result, a new password is created during this process. Log into the Portal with the password that is contained in the e-mail you receive. You will be required to change your password when you log on with the new password.

Note: If you have forgotten **both** your Logon ID and your password, you must contact your MWA. Your MWA has the ability to re-set your password. If you are the MWA and have forgotten your Logon ID and your password, contact the NCRB, NCRF and NCIGA Information Center.

- Step 3a.** Click the **BACK** button to return to the Portal home page.

Change Your Password

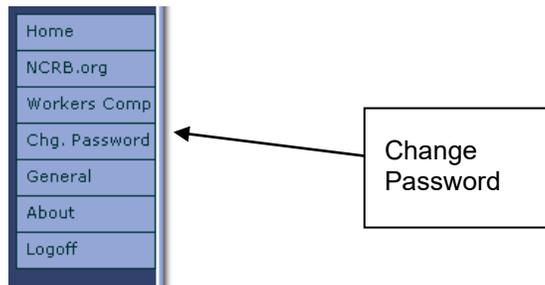
There are numerous reasons why you may need to change your password to enter the Portal. Here are several examples of situations that require a password change:

- Personnel changes
- Someone else has obtained access to your password
- You were forced to change a similar password on a different site and you would like to keep them in sync.

To change your password, follow these procedures:

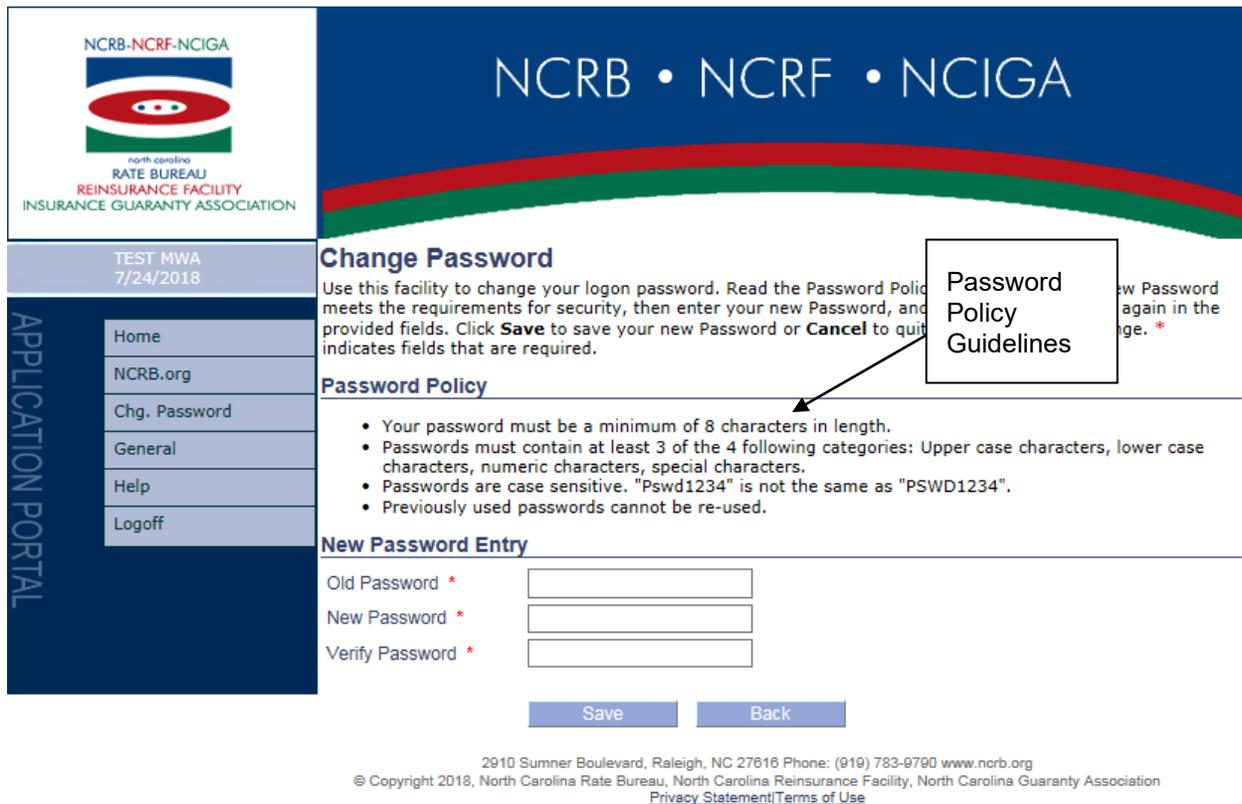
Step 1. On the **PORTAL HOME** page, click the **CHG. PASSWORD** menu item. The **CHANGE PASSWORD** page displays.

Figure 1-12: Portal Home Page Menu Items



Step 2. Enter your new password in the **NEW PASSWORD** and **VERIFY PASSWORD** text boxes and click **SAVE**. Your password is changed and you are redirected back to the **PORTAL HOME** page. You will be required to use the new password the next time that you log onto the Portal.

Figure 1-13: Change Password page



Note: If you entered a password that does not fulfill the NCRB, NCRF and NCIGA's Password Policies, you will receive a message indicating that your password does not comply. Enter a different password using the instructions in the Password Policy section as a guide.

Step 2a. Click the **BACK** button. Your password is not changed and you are re-directed back to the **PORTAL HOME** page.

Change Your Logon ID

There are only two reasons why a user should request a change to their Logon ID:

- the user's logon id was created incorrectly
- the user has changed their name and the logon id should reflect their name change

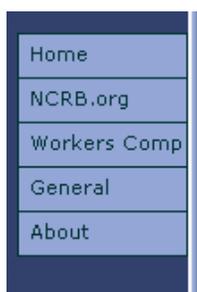
Only administrators of the system can change your Logon ID. Your MWA has the ability to correct the logon id if the account was created within the last 24 hours. If the account was created more than 24 hours in the past, then your MWA must contact the NCRB, NCRF and NCIGA Information Center to have the Logon ID changed.

Launching an Application

The Portal is the common place from which all secured applications are accessed on the NCRB, NCRF and NCIGA Web site. You will only see applications you have been authorized to access. All of the applications are categorized based upon the business unit that the application represents. To launch an application, follow these procedures:

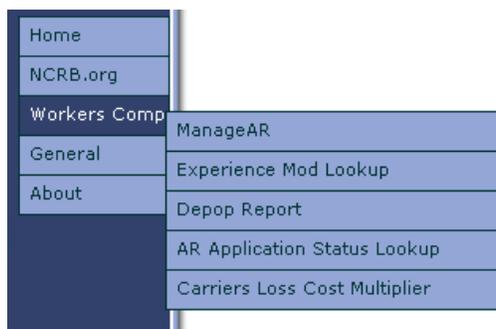
- Step 1.** Click the **BUSINESS UNIT** menu item on the left hand navigation menu that pertains to the application that you would like to use. For non-specific business unit applications, click the **GENERAL** menu item.

Figure 1-14: Portal Menu Items



- Step 2.** Click the **APPLICATION NAME** menu item that appears to the right of the Business Unit menu item. The application page displays.

Figure 1-15: Portal Application Name Menu Items



Request Access to an Application

If you know of an application that exists on the NCRB, NCRF and NCIGA web site, but you do not see it in your list of applications on the Portal, then your Logon ID does not have access to the application. To request access, you must contact your MWA or WA.