

2024

Risk Purchasing Group Update Module

Industry Access Portal - User Manual

LOUISIANA DEPARTMENT OF INSURANCE

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Risk Purchasing Group Update Module

This module was created by the Louisiana Department of Insurance to allow a Risk Purchasing Groups (RPGs) to submit changes to address, insurers, officers, and directors electronically, at any time, separately from annual renewals.

This information is divided into the following sections:

- Address and Contact Information
- Insurance Companies
- List of Management and Owners
- Producer Info
- Attestation

Required fields are marked with a red asterisk. To save any updates, you must check the Attestation box and then click the “Update” button.

The screenshot shows the 'Risk Purchasing Group Update Module' web interface. At the top, there is a dark blue header with the text 'Risk Purchasing Group Update Module' and a small blue icon. To the right of the header, the email 'hta@di.la.gov' and the text 'This is a Test Company' are visible, along with a red 'Close This Tab' button. Below the header, a light gray box contains the instruction: 'Make any required changes and then click the update button to submit the changes.' Below this, an 'Important Note' states: 'An asterisk * indicates a required field. Changes will be visible within 24 hours after submission.' The main content area is titled 'Address and Contact Information' and features a 'Mailing' section with four required fields: 'Street *' (12345 Huy Street), 'City *' (Baton Rouge1), 'State *' (AR), and 'Postal Code *' (44444-____). A blue 'Update' button is located at the bottom right of the form. Below the 'Mailing' section, there is a 'Books and Records' section which is currently empty.

Note: Any changes made will be visible within 24 hours after submission.

Address and Contact Information

The Address and Contact Information section will be prefilled with data from your Industry Access account. This data is divided into the following sections:

- Mailing
- Books and Records
- Domicile
- Administrative

The screenshot displays a web form titled "Address and Contact Information". It is divided into two main sections: "Mailing" and "Books and Records".

Mailing Section:

- Street: 12345 Huy Street
- City: Baton Rouge1
- State: AR (dropdown menu)
- Postal Code: 44444-____

Books and Records Section:

- Street: [Empty text box]
- City: Baton Rouge
- State: LA (dropdown menu)
- Postal Code: 12345-____

An "Update" button is located at the bottom right of the form.

Note: the Domicile State cannot be changed within this module.

Insurance Companies

The Insurance Companies section lists all insurance companies associated with the record.

Add Insurer

To add a new insurer, first search for the insurer by entering a company name or NAIC # into the Insurer field and selecting the correct insurer. Then click the “Add Insurer” button.

The screenshot shows the 'Insurance Companies' section. At the top, there is a search field labeled 'Insurer:' with the placeholder text 'Search by Company Name or NAIC #'. To the right of the search field is a blue button labeled 'Add Insurer'. Below the search field is a table with the following columns: 'Company Name', 'NAIC #', and 'Ineffective Date'. The table contains one row with the following data: 'This is a Test Company Two', '9999999', and an empty 'Ineffective Date' cell. To the right of the 'Ineffective Date' cell in the table is a red button labeled 'Remove'. At the bottom of the table, there are navigation controls including a page number '1', a dropdown menu for '10 items per page', and a status indicator '1 - 1 of 1 items'. A blue 'Update' button is located at the bottom right of the interface. An orange arrow points to the 'Add Insurer' button.

Remove Insurer

To remove an insurer, click the “Remove” button.

This is a close-up view of the table row from the previous screenshot. The row contains the text 'This is a Test Company Two' in the 'Company Name' column, '9999999' in the 'NAIC #' column, and an empty 'Ineffective Date' column. A red button labeled 'Remove' is positioned to the right of the 'Ineffective Date' cell. An orange arrow points to the 'Remove' button.

You will be prompted to enter an Ineffective Date for the insurer. Today’s date will be prefilled. Click the “Save” button.

The modal dialog box is titled 'Remove an Insurance Company'. Below the title, it displays 'This is a Test Company Two'. There is a label 'Ineffective Date' followed by a text input field containing '3/16/2022' and a calendar icon to its right. At the bottom of the dialog, there are two buttons: a blue 'Save' button and a grey 'Cancel' button. An orange arrow points to the 'Save' button.

If you remove an insurer by mistake, revert your changes by clicking the “Undo Ineffective” button.

This screenshot shows the table row after the insurer has been removed. The 'Company Name' column now contains '(Inactive) This is a Test Company Two'. The 'NAIC #' column contains '9999999' and the 'Ineffective Date' column contains '3/16/2022'. A blue button labeled 'Undo Ineffective' is located to the right of the 'Ineffective Date' cell. An orange arrow points to the 'Undo Ineffective' button.

Note: if only one insurer is listed you cannot remove it unless another insurer is added first.

List of Management and Owners

The List of Management and Owners section lists all existing management and owners and allows you to add new management and owners.

Add

To add new management and owners, click the “Add New Record” button.

The Add/Edit Management and Owner window will open. Enter info into the fields and then click the “Submit” button. Required fields are marked with a red asterisk.

Note: additional fields will be displayed depending on the Relationship Type(s) selected. You can select multiple Relationship Types.

Remove

To remove existing management and owners, click the “Remove” button.

Existing Management And Owners

Name	Ownership %	Position	Ineffective Date	
Chiang, Brian	0%	Director		Remove
Smith, John Hebert	1%	Owner		Remove
Test, Brian	0%	Director		Remove
Ta, Huy	0%	Officer		Remove
Ta, Huy	0%	Officer		Remove

Navigation: 10 items per page, 1 - 5 of 5 items

You will be prompted to enter an Ineffective Date. Today’s date will be prefilled. Click the “Save” button.

Remove Management and Owner

Chiang, Brian

Ineffective Date

PLEASE NOTE: Making an individual inactive on this screen does not revoke any Industry Access System permissions held by the individual. Revocation of Industry Access permissions must be done separately using the “User Management” menu option available only to the Industry Access Account Administrator. The name and contact information for the Industry Access Account Administrator is listed below:

Michael Boutwell
mboutwell@ldi.la.gov
2252190620

If you removed management or owners by mistake, revert your changes by clicking the “Undo Ineffective” button.

(Inactive) Chiang, Brian	0%	Director	3/16/2022	Undo Ineffective
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Producer Info

The Producer Info section lists all insurance producers.

Add Producer

To add a new producer, first search for the producer by entering a name, license #, or NAIC # into the Producer field and selecting the correct producer. Then click the “Add Producer” button.

The screenshot shows a 'Producer Info' section with a search bar labeled 'Search by Producer (Last Name, First Name), License #, or NPN' and a blue 'Add Producer' button. Below the search bar is a table with columns: Name, License #, NPN, Ineffective Date, and a 'Remove' button. The table contains one entry: 'Test Agency Test' with license # '840278'. At the bottom, there are navigation controls including a dropdown for '10 Items per page' and a status indicator '1 - 1 of 1 items'.

Remove Producer

To remove a producer, click the “Remove” button.

This is a close-up of the 'Remove' button in the table row for 'Test Agency Test' with license # '840278'. The button is red and has an orange arrow pointing to it.

You will be prompted to enter an Ineffective Date for the producer. Today’s date will be prefilled. Click the “Save” button.

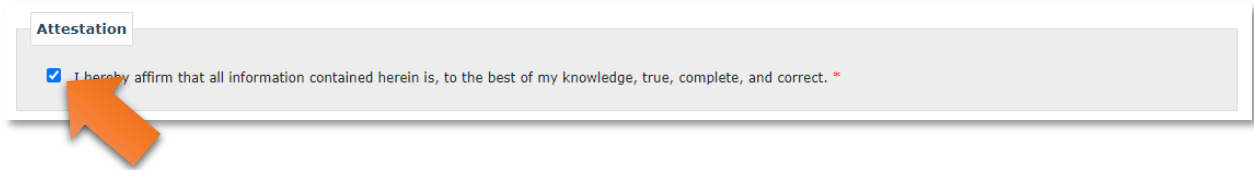
The dialog box is titled 'Remove a Producer' and is for 'Test Agency Test'. It has a field for 'Ineffective Date' with the value '3/16/2022'. Below this is a 'PLEASE NOTE' section with a warning about permissions. At the bottom, there is contact information for Michael Boutwell and two buttons: 'Save' (highlighted with an orange arrow) and 'Cancel'.

If you remove an insurer by mistake, revert your changes by clicking the “Undo Ineffective” button.

This screenshot shows the producer table after the 'Test Agency Test' producer has been removed. The row is now greyed out and includes the date '3/16/2022'. A blue 'Undo Ineffective' button is visible at the end of the row, highlighted with an orange arrow.

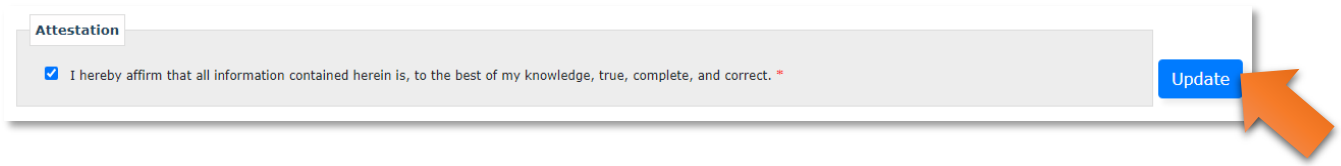
Attestation

Before you can save any updates made to the record, you must first click the box in the Attestation section to affirm that the information is correct.



A screenshot of a web form titled "Attestation". It contains a single checkbox that is checked, followed by the text "I hereby affirm that all information contained herein is, to the best of my knowledge, true, complete, and correct. *". An orange arrow points to the checked checkbox.

Then click the "Update" button.



A screenshot of the same web form titled "Attestation". The checkbox is checked, and the text "I hereby affirm that all information contained herein is, to the best of my knowledge, true, complete, and correct. *" is visible. A blue "Update" button is located on the right side of the form. An orange arrow points to the "Update" button.

Note: Any changes made will be visible within 24 hours after submission.