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CIRCULAR LETTER

To : To all Life and Non-Life Insurance Companies

Subject : Launching of the Insurance Commission's Client Web Portal-Licensing System

Relative to our consultative meetings held last March and April 2011, all companies authorized to transact insurance business in the Philippines are required to submit to the Licensing Division on or before June 03, 2011 soft and hard copy of the list of their active insurance agents (batch submission) using the format shown in the attached Appendix A "Guidelines on the Use of the IC Web Portal". The file should be on a Compact Disc (CD) or Flash drive that can readily be uploaded to the IC servers. In addition, the company is obliged to issue a certification that the data/information is true and correct.

As regards to the submission of applications for new agents via the portal, each company must submit to the IC Licensing Division the names of their two (2) authorized users to the portal on or before May 25, 2011. Applications can start upon receipt of usernames and passwords which will be provided to each company via e-mail.

Attached also to this Circular is Appendix B "User Manual for the IC's Client Web Portal", for your ready reference.


EMMANUEL F. DOOC
Insurance Commissioner



Appendix A

GUIDELINES ON THE USE OF THE IC WEB PORTAL

I. PURPOSE:

The purpose of this guideline is to provide clear direction and institute proper adherence to the utilization of IC's Web Portal, specifically the Licensing System.

II. SCOPE:

The guideline shall cover the Licensing Division of the Insurance Commission (IC) which will be the owner/primary end-user of the system. Life and Non-life Insurance Companies would be the client and remote end-users of the Web Portal. The system will be hosted within the IC Data Center premises and shall be monitored and administered technically by the IT Group of IC.

The Statistics and Research Division as well as the Office of the Commissioner are the secondary end-users of the system. They will be able to generate statistical reports out of the agents' databases that will be created and maintained by the system.

The system's master databases will also benefit the insuring public, researchers and other stakeholders, where it will provide real-time information/s to the IC website.

III. OBJECTIVES:

The main objectives in implementing the Licensing System via the IC Web Portal shall include but not limited to the following:

1. To enhance the Licensing process of the Insurance Commission through automated licensing solution.
2. To provide better and faster processing of agent's license.
3. To ensure that all licensing processes for new application are responded to at a maximum of fifteen (15) working days.
4. To provide real-time statistical information for top-level management if IC.
5. To provide its clients and stakeholders a very high satisfaction rate for work carried out.

IV. GUIDELINE DETAILS:

A. For encoding/population of new agents

1. IC will allow two (2) user access to the portal for each company. Additional user access maybe granted based on justification to be presented in writing by the insurance company. These user access IDs will be used to populate/encode profile of new agents for application and also to update their company profile.
2. Each company must submit to the IC Licensing Division the names of their authorized user to the portal on or before May 25, 2011.
3. Application for new agents licensing using the portal system may start on May 30 onwards, upon receipt of usernames and passwords which will provided to each company through e-mail.
4. Hardcopy of applications for new agents, including any required supporting documents that were previously encoded in the portal must also be submitted to the Licensing Division.
5. The company is accountable for any use of the IC web portal.
6. A user's manual is also being furnished to each company

B. For Batch Submission of active agent/s information

1. The Insurance Commission (IC) provide each insurance company a file template (Excel 2003 version) for the batch uploading of their existing active agents.
2. The same file shall be filled-up and/or populated by the company and submit the same, including a certified hard copy or file printout to the Licensing Division on or before June 03, 2011.
3. The agent's picture with a maximum of 50kb per .jpg image shall be compressed in a .zip file and will also be submitted to the Licensing Division.

C. File template for Existing Agents:

Note: Field Names in asterisk (*) are the minimum required fields

Field Name	Length	Type	Description/Format
Agent ID	18	decimal	Primary key (auto number)
*TIN	20	alpha numeric	Agent's Tax Identification Number Format example: 000-000-000-000
*Last Name	30	alphanumeric	Agent's Surname
*First Name	30	alphanumeric	Agent's First name
*Middle Name	20	alphanumeric	Agent's Middle name
Corporate ID	18	decimal	Corporate ID for corporation/partnership classification
*Corporate Name	100	alphanumeric	Agent's corporate name for corporation/partnership classification
*Res ZIP	6	alphanumeric	Agent's residential ZIP code
*Bus ZIP	6	alphanumeric	Agent's business ZIP code
*Birth Date	8	date	Agent's date of birth Format example: mm/dd/yyyy
Birth Place	50	alphanumeric	Agent's place of birth
*Citizenship	50	alphanumeric	Agent's citizenship
*Gender	6	alphanumeric	Agent's gender Format example: Female or Male
*Civil Status	15	alphanumeric	Agent's civil status Format example: Single, Married, Separated, Widow/er
Spouse Name	50	alphanumeric	Agent's name of husband or wife
*Naturalized Date	10	date	Agent's date of naturalization Format example: mm/dd/yyyy
*Naturalized Place	50	alphanumeric	Agent's place of naturalization
*ACR Number	20	alphanumeric	Agent's ACR number

Field Name	Length	Type	Description/Format
*ACRIssueDate	10	date	Date of ACR issuance Format example: mm/dd/yyyy
*ACR IssuePlace	50	alphanumeric	Place of ACR.issuance
*Home Address	MAX	memo	Agent's residential address
*Buss Address	MAX	memo	Agent's business address
*Email	50	alphanumeric	Agent's e-mail address
*Agent Picture	50	alphanumeric	Agent's picture filename (file size max. of 50kb) Format example: agent001.jpg
*Exam Date		date	Agent's date of examination
*Exam Result	18	decimal	Agent's examination result
*Exam Issued	10	alphanumeric	Issuer of examination, ie. IC, IAAP, Other insurance certification or previous license number
*Exam Type	50	alphanumeric	Type of examination taken by agent
License ID	18	decimal	Primary key (auto number)
Agent ID	18	decimal	Foreign key
*TIN	20	alphanumeric	
*App Type	50	alphanumeric	
*License Num	15	alphanumeric	Agent's license number
*License type	30	alphanumeric	Agent's type of license
Company ID	18	decimal	Primary key (auto number)
Company Affil	15	alphanumeric	
*Company Name	100	alphanumeric	Agent's company name
Corporate ID	18	decimal	
Corporate Name	100	alphanumeric	
*Issue Date	10	date	Date license was issued
*Valid_From	10	date	Start date of license validity
*Valid_To	10	date	End date of license validity
*Cancel_Date	10	date	Date license was cancelled
*Remarks	MAX	memo	Remarks/description
TranType	50	alphanumeric	Type of transaction

Field Name	Length	Type	Description/Format
Tran Date	10	date	Date of transaction
User ID	18	decimal	Primary key (auto number)
For Approval	5	bit	Approved for payment i.e. True or False
Approved	5	bit	Approved with license i.e. True or False
*Approved_Date	10	date	Date license was approved Format example: mm/dd/yyyy
Payment	5	bit	Payment for application was made ie. True or False
Payment Date	10	date	Date of payment for the application Format example: mm/dd/yyyy
PaymentID	18	decimal	Primary key (auto number)
ORNo	10	alphanumeric	Order receipt number
IDPrint	5	bit	ID license was printed ie. True or False
IDPrintDate	10	date	Date ID license was printed
Renewed	5	bit	ID license was renewed ie. True or False

V. ROLES AND RESPONSIBILITIES:

IC Licensing Division

Shall review, evaluate and approve the information/s submitted and encoded to the Client Web Portal.

IC IT Group

Shall create user accounts for the Client Web Portal access and conduct the uploading of the files encoded to the Licensing System database/s;

Provide systems development modification and database administration of the Client Web Portal for the Licensing Division.

IT Committee

Shall monitor and approve the completion of the project activity (Client Web Portal) in compliance with the guideline.

Insurance Company (Life and Non-life)

Shall provide the encoding of applications for new agents and listing of its active agents together with the other necessary documentary requirements.

VI. MONITORING, EVALUATION AND REVIEW:

The schedules set forth within this guideline shall be observed to catch up with the June 30 deadline of license renewal of agents. Any modifications or amendments to the guideline shall be subject to the approval of the IC Commissioner.

VII. DEFINITIONS AND ABBREVIATIONS:

ACR – Alien Certificate of Registration

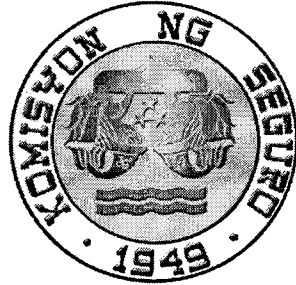
IC – Insurance Commission

IC CLIENT WEB PORTAL - is an intranet that functions as a point of access to information on the IC Licensing system.

It offers services such as the user, company and agent profile, e-mail (message board) and access to related database such as the list of corporate and partnership information/s. It aims for a consistent look and feel with access control and procedures for other future applications and databases of the Commission.

It includes workflow, collaboration, and policy-managed content publication. It allows internal and external access to specific information using secure authentication.

INTRANET - a private computer network that uses Internet Protocol technology to securely share any part of an organization's information or network operating system within the organization. The term is used in contrast to internet, a network between organizations, and instead refers to a network within an organization. Sometimes the term refers only to the organization's internal website, but may be a more extensive part of the organization's information technology infrastructure. It may host multiple private websites and constitute an important component and focal point of internal communication and collaboration. Any of the well known Internet protocols may be found in an intranet, such as HTTP (web



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USER MANUAL FOR THE IC CLIENT WEB PORTAL

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I. Brief Description of the IC Client Web Portal Project

The Insurance Commission (IC) Client Web Portal Project is a web based system intended for its clients such as insurance and pre-need companies, insurance and reinsurance brokers, other insurance and pre-need intermediaries and Mutual Benefit Associations & Trusts, for Charitable Uses.

The first phase of the project is the involvement of the life and non insurance companies in the following areas:

- On-line updating of its company's profile
- On-line license application of company's insurance agents.

The project's primary goal is to improve the process licensing of insurance agents by initially building up the insurance agent's database through the help of insurance companies.

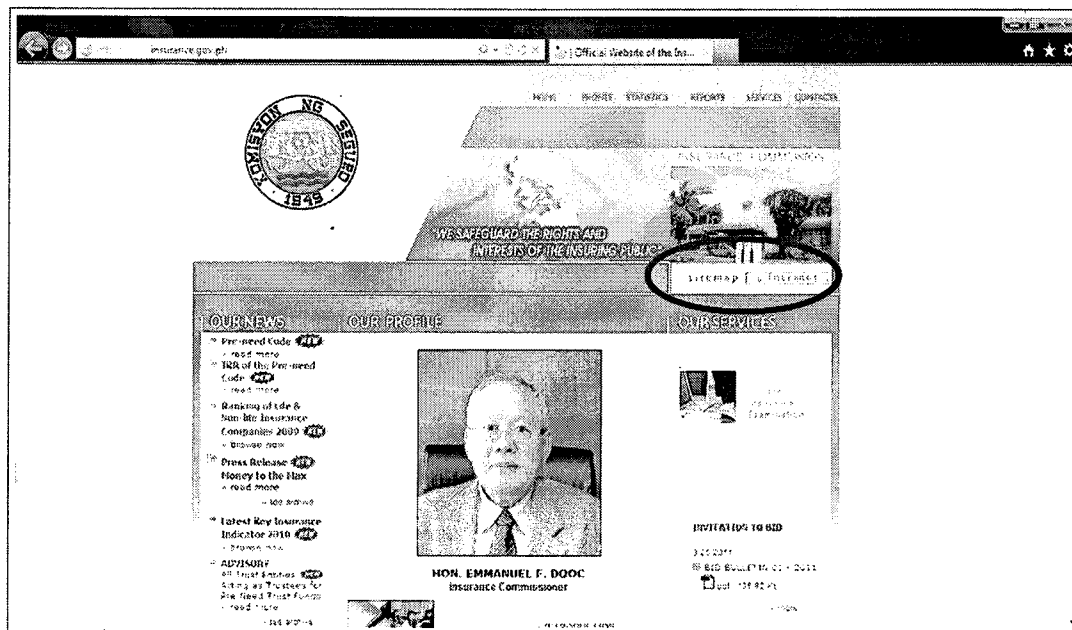
The second phase of the project would be the enhancement of the system, alongside with the function of electronic payment, reports generation and granting access to other IC clients.

II. Access to the IC Client Web Portal

To be able to log to the IC Client Web Portal, a username and password will be provided by the Insurance Commission to the insurance company. The insurance companies are required to submit to the Commission its authorized personnel(s) to gain access to the portal.

To login:

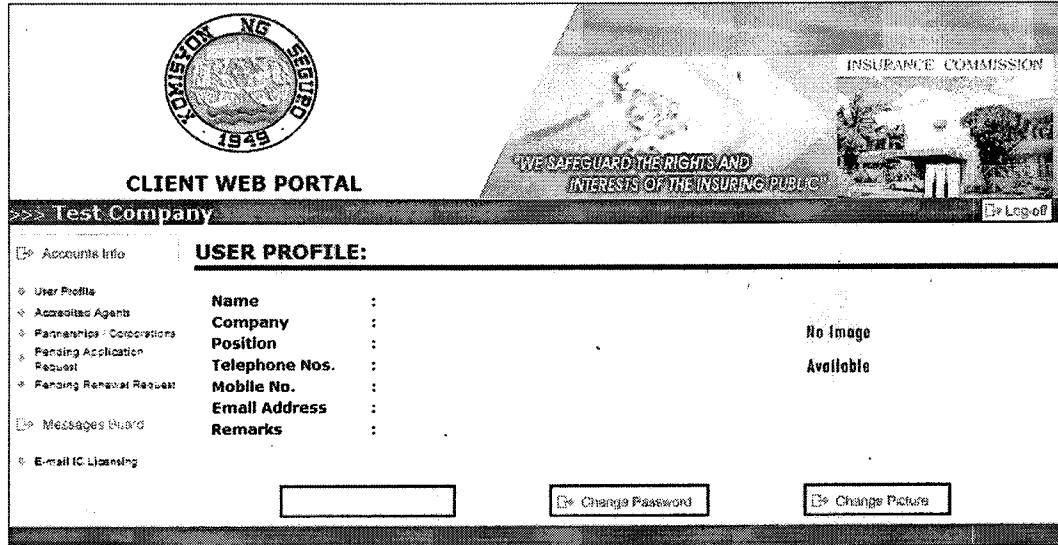
1. It is advised that the company use **Internet Explorer** as its web browser to be compatible with the IC Client Web Portal.



2. Go to the Insurance Commission Webpage (www.insurance.gov.ph) and click on the 'INTRANET/LOGIN' portion found in the right-upper most section of the webpage. Or type this address: www.insurance.gov.ph/intranet.asp to your web browser.
3. Type in your authorized user name and password. Then click [Submit]. *Note: As a security measure, there will be an automatic cut-off when there is no activity or in case of idle time. The user is required to re-enter his/her username and password to re-access the Portal.*

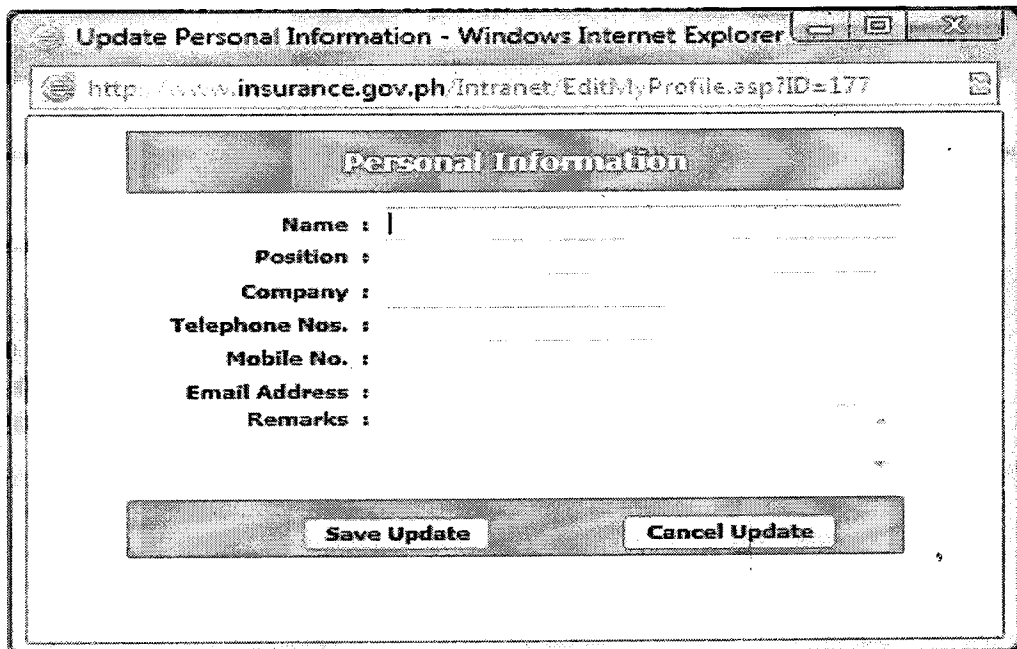
4. a. The default page is the User Profile. The company's authorized user may edit/change his or her personal information by clicking [Update Personal Info], [Change Password] or [Change Picture]. *Note: All information put in the system regarding the User Profile will be treated as private and confidential and intended for authorized IC user only.*

Default Page for Authorized User of Company Profile Account



Default Page for Authorized User of Licensing Account

- b. It is highly recommended that the Authorized User change his password upon initial login to the Portal. Password should be in alphanumeric form with maximum of eight (8) characters.
- c. After making any changes in the User profile, click [Save Update] button



A. Company Profile Account

1. The Company Profile Account is patterned after the first page of the Annual Statement which is submitted by insurance companies every 30th of April. IC aims to have an updated profile of the insurance company status, officers and stockholders. The Company Profile page will display vital information regarding the company including information of the company's officers and board of