

Insurance Council
BRITISH COLUMBIA

Annual Licence Renewal

Bulk Payments

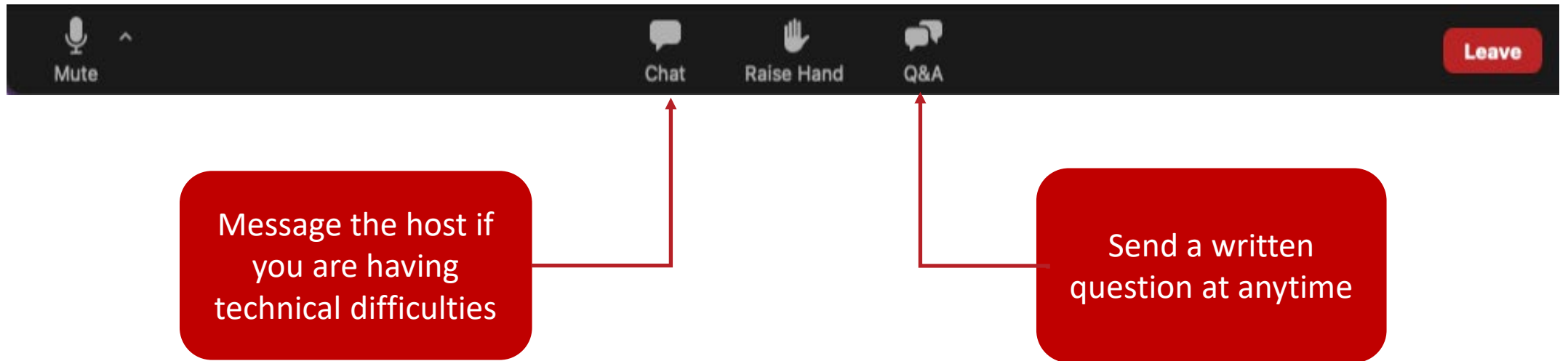
March 2023



Webinar Tips

Using the Q&A and chat: Use the Q&A function to submit a question and Chat to Panelists if you need technical support.

We will post relevant links in the Chat.



Insurance Council of BC Team

- Alexandra Cavasin, *Manager, Practice and Quality Assurance*
- Melissa Radic, *Manager, Administrative Services*
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- Jihun Park, *Practice and Quality Assurance Advisor*
- Nayibe Blanquicet Rangel, *Licensing Officer*
- Miranda Pang, *Portal Support Administrator*

What We'll Cover:



- Overview of annual licence renewal requirements
- Step-by-step process for individual licensees
- Step-by-step process for nominee (or delegate)
- Bulk payment options
- Frequently asked questions
- Q&A

Annual Licence Renewal Requirements



Annual Licence Renewal Requirements

- **Who needs to renew?**

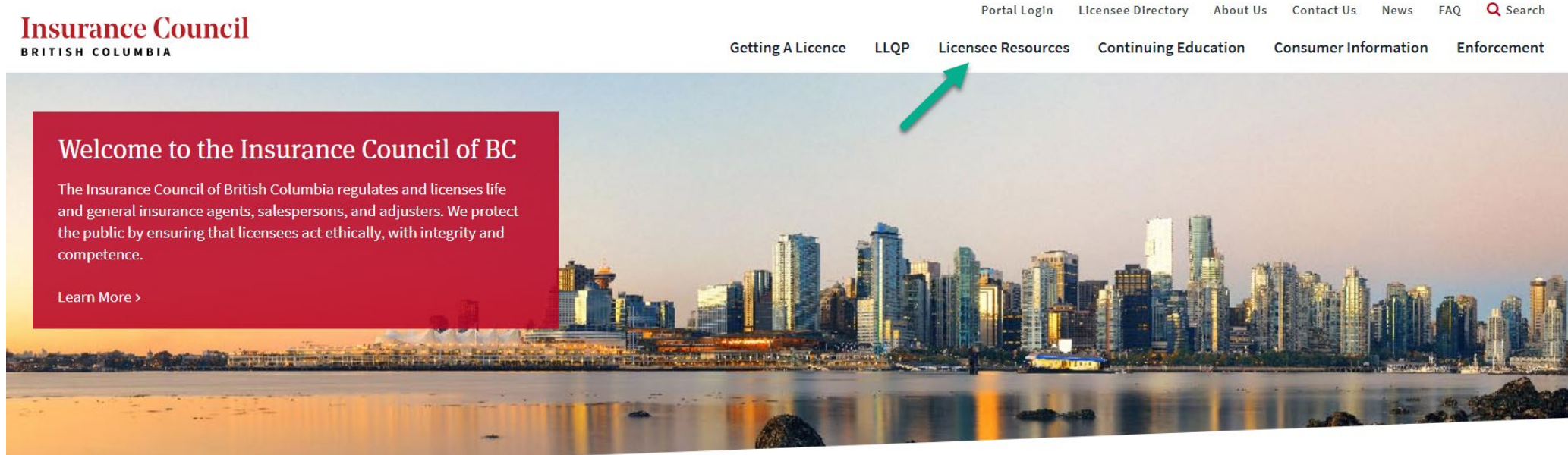
- An annual licence renewal is required for every licence that is held with the Insurance Council, regardless of active, inactive or suspended status.

- **When does the renewal period start and end?**

- Annual licence renewal will open on March 31st, 2023 and the deadline to submit the payment is June 1st, 2023. The late renewal period runs until Tuesday August 1st, 2023.

Annual Licence Renewal Requirements

- **New for 2023 Annual Licence Renewal – amendments to Rule 4(4)**
 - Licensees must meet CE and E&O requirements before they can renew



Annual Licence Renewal Requirements

Home > Licensee Resources

Insurance Licensee Resources

Council is here to help. Your insurance licensee resources include compliance information such as licensee responsibilities; council rules; continuing education; disciplinary decisions and process; and other useful information for licensed individuals, partnerships, or corporations in BC.

Council makes every effort to keep insurance licensee resources regularly updated. Please check back often.

Council Rules and Code of Conduct

Review or download the most current Council Rules and Code of Conduct, including licence conditions, and other licensee responsibilities.



Guidelines

Review various guidelines on what is required of licensees.



Continuing Education Program

Review continuing education requirements for all insurance licence classes; keeping continuing education records; and what to do if there's a continuing education audit.



Errors and Omissions Insurance

Review licensee Errors and Omissions Insurance requirements, including minimum coverage amounts, policy limits, and any specific insurance licence class requirements.



Notifications to Council

Find out when you must notify Council of a change of circumstance for you or your business — including if you file for bankruptcy, or if your business changes ownership, its name, or its address.



Annual Licence Renewal

See how and when to renew your licence, including compliance information; fee schedules; payment deadlines; and other annual reporting licensee responsibilities.



Annual Licence Renewal Requirements

- **What is required for an annual licence renewal?**
 - Confirming compliance with licensing requirements (Declaration)
 - A fee (paid at the time of the declaration, or by the agency/firm at a later date)
- **What is the annual licence renewal fee?**

	If paid by June 1, 2023	If paid by August 1, 2023
Individual	\$285	\$285 + \$200 late fee
Agency/Firm	\$525	\$525 + \$350 late fee

Annual Licence Renewal Requirements

- **Where to submit the declaration and fee?**
 - All annual licence renewal declarations and fees are submitted via the online portal.
- **Why is annual licence renewal required?**
 - It is a requirement under Council Rule 4(4) for continuous licensing.
 - Licences will be automatically cancelled if the fee is not received by Tuesday August 1st, 2023.

Individual Licence Renewal Step-by-Step



Main Menu

I want to ...

Licences

- [Apply for a personal licence](#)
- [Complete my annual licence renewal](#)
- [View my licence record\(s\)/Pay fee\(s\)](#)
- [Manage my applications](#)
- [View/Print my receipts](#)
- [View/Print my licence certificate](#)
- [Declaration Summary Report](#)

Trainee Registrations

- [Apply for a Trainee Registration](#)
- [Manage my Trainee Registration](#)

Exams

- [Register/Manage my LLQP exams](#)
- [Confirmation of Online LLQP Exams](#)
- [View my exam confirmation letter](#)
- [View my exam results](#)
- [View/Print my receipts](#)

Continuing Education

- [CE Self-Tracker](#)
- [CE Course Registration](#)

Contact Information

- [Update my portal login information](#)
- [Change my password](#)
- [Update my contact information](#)
- [Review the Agencies/Firms I am a delegate of](#)

For Corporations/Insurers/Direct Writers

Corporate Licences

- [Apply for a corporate licence](#)
- [Manage my applications](#)
- [Manage my Agencies/Firms](#)
- [List and manage bulk renewal payments](#)
- [Manage Prepaid Accounts](#)
- [Manage Authorizations to Represent \(ATR\)](#)
- [Manage delegates](#)
- [Verify Applicant Applications](#)
- [Verify Trainee Registration Applications](#)
- [Manage Applicant/Licensee Courses](#)

Insurers/Direct Writers

- [Pay my annual fee](#)
- [Manage Authorizations to Represent \(ATR\) - Direct Writers](#)
- [List and manage bulk renewal payment](#)

Annual Licence Renewal Instructions

Annual Licence Renewal

Online licence renewal for 2023 is now open. Submitting your annual licence renewal online consists of several steps; the instructions below will show you the steps to expect. This process will take approximately 15 minutes.

Please use the buttons in the portal to navigate from screen to screen and avoid using your browser buttons.

Please note that you must confirm you have met your CE credits and have the required E&O insurance BEFORE you are able to proceed to renew your licence, in line with Council Rule 4(4).

Freedom of Information and Protection of Privacy Act

Personal information provided by you to the Insurance Council of British Columbia is collected, used, and disclosed in compliance with the provisions of the *Financial Institutions Act* and *Freedom of Information and Protection of Privacy Act*.

See our 2023 Annual Licence Renewal Page for [detailed instructions](#) and [more information](#).

Proceed to Annual Licence Renewal

What You Need to Know

- The deadline to complete your annual licence renewal is **June 1, 2023**. The renewal deadlines is the same for all licence types and classes.
- Annual licence renewal applies to all licensees, regardless of licence status (*active, inactive, suspended*) and **must be completed for each individual and agency/firm licence type**.
- You must have met your annual CE requirements for your licence class **before** you renew your licence. During the renewal process, you will be asked to declare that you have done so in order to proceed.
- Corporate licensees and individual life and/or accident & sickness agents are required to declare they meet E&O insurance requirements.
- Even if your agency or firm is paying your renewal fee, 1) **you are still responsible for submitting your annual licence renewal declarations**, and 2) **you are responsible for ensuring the renewal fee is received by the Insurance Council**.

Step 1: Review/Update Contact Information

 [Main Menu](#)

[Payment Items \(0\)](#) [Logout](#)

[Home](#) / [Annual Licence Renewal](#) / [Contact Information Verification](#)

Contact Information Verification

Licensees have an obligation to provide notification to the Insurance Council of BC of a change in contact information.

Please confirm that your contact information is up to date by selecting "Yes".

If you are unsure or need to make a change to your contact information, please select "No", and then click on the link provided to update your contact information before proceeding with your annual licence renewal.

☐ Yes ☒ No

Before completing your annual licence renewal you must review your contact information and update as necessary. To review and update your contact information click [here](#).

[Continue](#)

Step 1: Review/Update Contact Information

 [Main Menu](#)

[Home](#) / [Annual Licence Renewal](#) / [Contact Information Verification](#)

Contact Information Verification

Licensees have an obligation to provide notification to the Insurance Council of BC of a change in contact information.

Please confirm that your contact information is up to date by selecting "Yes".

If you are unsure or need to make a change to your contact information, please select "No", and then click on the link provided to update your contact information before proceeding with your annual licence renewal.

☒ Yes ☐ No

 **Continue**

Step 2: Start Renewal Process

 Main Menu

Home / [Licenses](#)

Download/export selected | Add to Payment Items

Payment Items (0) Logout

☐

Licence Number

Licence Type

Licence Status

Licensee Name

City

Action

Next Renewal Date

☐

LIC-2023-0039623-R01

General Licence - Individual

Active

Camomile Chai

Vancouver

Renew Licence

2023-06-01

Quick Search



Step 3: Select Payment Preference

Payment Options

PAYMENT OPTIONS

* I have an agreement ☒ Yes ☐ No
with my agency/firm
that they will pay for
this renewal:

Continue »



Step 4: Practice Questions

To help the Insurance Council offer more effective services and technology, we are asking a few questions about licensees' practice that will allow the Insurance Council to better understand licensees' needs and business environment.

Providing this information is entirely optional, but is encouraged as it will help us develop appropriate practice tools and resources for licensee support.

Practice Information (Optional)

GENERAL INFORMATION

Is Insurance your primary occupation? [?](#)

☐ Yes ☐ No

Do you offer clients a self-serve or online sales option where clients are able to purchase, transact, or amend their coverage themselves?

☐ Yes ☐ No

Do you interact or work directly with clients/insureds?

☐ Yes ☐ No

AREAS OF INSURANCE PRACTICE

What are your areas of insurance practice / insurance specialization? (Select all that apply)



[« Back](#)

[Continue »](#)



Step 5: Review Authority to Represent (ATR) Information

Active Agencies/Firms Represented List

ACTIVE ATR

Please review the authorization to represent information that the Insurance Council has on file for you. If any of the information displayed here requires updating, this can be done, by the agency/firm you represent, via the corporate portal account or by submitting an Add/Remove ATR form to the licensing team. Please refer to our [Holding Out \(Authority to Represent\)](#) section on our website for more information. You cannot update this information through your portal account.

If your current agency/firm that you represent is not listed, they will not be able to submit payment for your annual renewal fee on your behalf, but you can still complete your renewal declaration now.

Please click Continue to proceed with your annual renewal.

Showing 1-1 of 1

Agency/Firm Name	Effective Date
Cup of Tea Insurance Agency Ltd.	02/28/2023

« Back

Continue »



Step 6: Confirming Compliance with Licensing Requirements (Declaration)

Individual Declaration

By submitting this annual renewal declaration, I confirm that:

☒ I understand and am aware of my obligations under the Council Rules and the Code of Conduct. [?](#)

☒ I have met my Continuing Education requirements for the licence period June 1, 2022 to May 31, 2023 as required on or before May 31, 2023. [?](#)

- OR -

☐ I have met my Continuing Education requirements for the licence period June 1, 2022 to May 31, 2023 but did not complete them on or before May 31, 2023. [?](#)

- OR -

☐ I am licensed in my home jurisdiction, which has annual Continuing Education requirements that I am meeting as required; OR I am licensed in my home jurisdiction and I have met Insurance Council of BC Continuing Education requirements for the licence period June 1, 2022 to May 31, 2023. [?](#)

☒ Where required, I have submitted all mandatory disclosures to Insurance Council. [?](#)



Step 7: Review and Submit

 Main Menu

Payment Items (0) Logout

« Back

Continue »

Individual Licence Filing

Please review information below. If any updates are needed, click Edit beside the section requiring updates. Once review is complete click Continue at the bottom.

Payment Options

PAYMENT OPTIONS

I have an agreement with my agency/firm that they will pay for this renewal:

Edit

Practice Information (Optional)

GENERAL INFORMATION

Edit

Step 8: Confirmation

 Main Menu

Payment Items (0) Logout



Your annual licence renewal declaration has been submitted, **but your annual licence renewal is not yet complete**

As you indicated that your agency or firm will be paying the renewal fee on your behalf, **it is your responsibility to ensure that your agency or firm submits the fee by the deadline.**

After your agency or firm has submitted your payment, you can confirm that your renewal is complete by selecting *View my licence record(s)* from the main menu. Your next renewal date will display as June 1, 2024. This renewal date will also be displayed on your licence certificate and the public Licensee Directory.

You can access a copy of your submitted declaration from the portal main menu by selecting *Declaration Summary Report*

Paying your own renewal fee instead? Please select *View my licence record(s) and pay fees* from the portal main menu, and click on *Pay Fee Due for Renewal*.

Agency/Firm Annual Licence Renewal Step-by-Step



Step 1: Start Annual Licence Renewal

 Main Menu

Payment Items (0) Logout

[Home](#) / [Licenses](#)

[Download/export selected](#) | [Add to Payment Items](#)

cup



☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2023-0039624-R01	General Licence - Corporate	Active	Cup of Tea Insurance Agency Ltd.	Vancouver	Renew Licence	2023-06-01

[Download/export selected](#) | [Add to Payment Items](#)

renew



☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2023-0039628-R01	General Licence - Individual	Active	Lady Grey	Vancouver	Renew Licence	2023-06-01
☐	LIC-2023-0039627-R01	General Licence - Individual	Active	Dar Jeeling	Vancouver	Renew Licence	2023-06-01

Step 2: Select Payment Preference

Payment Options

Renewal

* I would like to include ☒ Yes ☐ No
this renewal fee in a
bulk payment.:

Continue »

Payment Options

Renewal

* I would like to include ☐ Yes ☒ No
this renewal fee in a
bulk payment.:

Continue »

Step 3: Practice Questions

Step 4: Declaration

Corporate Declaration

By submitting this annual renewal declaration, I confirm that:

- ☒ I understand and am aware of the agency/firm's obligations under the Council Rules and the Code of Conduct. [?](#)

- ☒ The agency/firm is covered by errors and omissions insurance as required under Council Rule 7(11). [?](#)

- ☒ The agency has a written agreement/authorization with at least one insurer authorized to do business in British Columbia, not including Insurance Corporation of British Columbia, where required [?](#)

- ☒ Where required, I have submitted all of the agency/firm's mandatory disclosures to Insurance Council. [?](#)



Step 5: Review and Submit

Step 6: Confirmation



Your renewal declaration has been submitted!

NOTE: From the main menu, please select List and manage bulk payments to process your renewal payment. This annual renewal is not complete until the payment has been received by the Insurance Council.

[Back to Main Menu](#)

Bulk Payments



List and Manage Bulk Renewal Payments

[Main Menu](#)Payment Items (0) Logout

I want to ...

Licences

- Apply for a personal licence
- Complete my annual licence renewal
- View my licence record(s)/Pay fee(s)
- Manage my applications
- View/Print my receipts
- View/Print my licence certificate
- Declaration Summary Report

Trainee Registrations

- Apply for a Trainee Registration
- Manage my Trainee Registration

Exams

- Register/Manage my LLQP exams
- Confirmation of Online LLQP Exams
- View my exam confirmation letter
- View my exam results
- View/Print my receipts

Continuing Education

- CE Self-Tracker
- CE Course Registration

Contact Information

- Update my portal login information
- Change my password
- Update my contact information
- Review the Agencies/Firms I am a delegate of

For Corporations/Insurers/Direct Writers

Corporate Licences

- Apply for a corporate licence
- Manage my applications
- Manage my Agencies/Firms
- List and manage bulk renewal payments
- Manage Prepaid Accounts
- Manage Authorizations to Represent (ATR)
- Manage delegates
- Verify Applicant Applications
- Verify Trainee Registration Applications
- Manage Applicant/Licensee Courses

Insurers/Direct Writers

- Pay my annual fee
- Manage Authorizations to Represent (ATR) - Direct Writers
- List and manage bulk renewal payment

Manipulating the List

 Main Menu

Payment Items (0) Logout

Home / Licenses

Download/export selected | Add to Payment Items

Quick Search

☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2023-0039630-R01	General Licence - Individual	Active	Jasmine Green	Vancouver	Pay Fee Due for Renewal Pay Fees Due	2023-06-01
☐	LIC-2023-0039629-R01	General Licence - Individual	Active	Earl Grey	Vancouver	Pay Fee Due for Renewal	2023-06-01
☐	LIC-2023-0039628-R01	General Licence - Individual	Active	Lady Grey	Vancouver	Pay Fee Due for Renewal	2023-06-01
☐	LIC-2023-0039627-R01	General Licence - Individual	Active	Dar Jeeling	Vancouver	Pay Fee Due for Renewal	2023-06-01
☐	LIC-2023-0039626-R01	General Licence - Individual	Active	Orange Pekoe	Vancouver	Pay Fee Due for Renewal	2023-06-01
☐	LIC-2023-0039624-R01	General Licence - Corporate	Active	Cup of Tea Insurance Agency Ltd.	Vancouver	Pay Fee Due for Renewal	2023-06-01
☐	LIC-2023-0039623-R01	General Licence - Individual	Active	Camomile Chai	Vancouver	Pay Fee Due for Renewal	2023-06-01

Paying by Credit Card / Interac Online

 [Main Menu](#)

Please select a payment method. To pay by Credit Card or Interac Debit select "Pay with Credit Card" below.

Payment Options

Amount to be charged: \$1,125.00

- ☒ Pay with Credit Card
☐ Pay with Prepaid Account
-

Submit Payment »

Prepaid Account Set-up

 Main Menu

Payment Items (0) Logout

I want to ...

Licences

- Apply for a personal licence
- Complete my annual licence renewal
- View my licence record(s)/Pay fee(s)
- Manage my applications
- View/Print my receipts
- View/Print my licence certificate
- Declaration Summary Report

Trainee Registrations

- Apply for a Trainee Registration
- Manage my Trainee Registration

Exams

- Register/Manage my LLQP exams
- Confirmation of Online LLQP Exams
- View my exam confirmation letter
- View my exam results
- View/Print my receipts

Continuing Education

- CE Self-Tracker
- CE Course Registration

Contact Information

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- Change my password
- Update my contact information
- Review the Agencies/Firms I am a delegate of

For Corporations/Insurers/Direct Writers

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- Manage my Agencies/Firms
- List and manage bulk renewal payments
- Manage Prepaid Accounts
- Manage Authorizations to Represent (ATR)
- Manage delegates
- Verify Applicant Applications
- Verify Trainee Registration Applications
- Manage Applicant/Licensee Courses

Insurers/Direct Writers

- Pay my annual fee
- Manage Authorizations to Represent (ATR) - Direct Writers
- List and manage bulk renewal payment

Prepaid Account Set-up

 [Main Menu](#)

[Payment Items \(0\)](#) [Logout](#)

[Home](#) / [Prepaid Accounts](#)

Prepaid Accounts

The Insurance Council's finance team will need to set up a prepaid account before you can use this option. Please send an email to accounting@insurancecouncilofbc.com and include the following information:

- Agency or firm's legal name
- Corporate licence number
- Contact Information

Please allow up to three business days for us to process your request and you will receive email confirmation when you can return to the online portal to add funds via credit card. Adding funds with EFT or cheque must be coordinated with the Insurance Council's finance team.

Adding Funds to a Prepaid Account

[Main Menu](#)

Payment Items (0) [Logout](#)

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Prepaid Accounts

[Download/export selected](#)

Quick Search

☐	Account ID	Balance	Status	Action
☐	164955	\$3,875.00	Active	Deposit

Adding Funds to a Prepaid Account

 Main Menu

Payment Items (0) Logout

To pay by credit card or Interac Debit, select “Pay with Credit Card below.”

To pay by EFT or by cheque, please contact the Insurance Council’s finance team at accounting@insurancecouncilofbc.com

* indicates a required field.

Account ID:
164955

* Amount:

☒ Pay with Credit Card

Submit Payment »

Using a Prepaid Account

 [Main Menu](#)

Please select a payment method. To pay by Credit Card or Interac Debit select "Pay with Credit Card" below.

Payment Options

Amount to be charged: \$1,125.00

- ☐ Pay with Credit Card
☒ Pay with Prepaid Account

Select Prepaid Account

☒ 164955

Prepaid Account: 164955
Amount Available: \$5,000.00

Submit Payment »

Payment Confirmation



Your payment has been successfully submitted

Note: If you made a payment for renewal then your next renewal date will display as June 1, 2024, both on your licence certificate and on the public Licensee Directory. You can download or print a copy of your updated licence certificate by selecting *View/print my licence certificate* from the portal main menu.

Receipts for fees you have paid via online portal are available in your portal account by selecting *View/Print my receipts* from the main menu.

You can also access a copy of your submitted declaration from the portal main menu by selecting *Declaration Summary Report*.

[Print/View Receipt](#)

[Back to Main Menu](#)

Prepaid Account Transaction History

[Main Menu](#)

Payment Items (0) [Logout](#)

[Home](#) / [Prepaid Accounts](#)

Prepaid Accounts

Download/export selected

Quick Search

☐	Account ID	Balance	Status	Action
☐	164955	\$3,875.00	Active	Deposit

Transactions

Download/export selected

From: yyyy-mm-dd



To: yyyy-mm-dd



Filter Dates

Quick Search

☐	Trans ID	Trans Type	Payment Method	Trans Amount	Trans Date	Receipt Number	Record ID	Full Name
☐	101	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:14 PM	148156	FIL-2021-00059	Jasmine Green
☐	100	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:14 PM	148156	FIL-2021-00058	Dar Jeeling
☐	99	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:13 PM	148156	FIL-2021-00057	Orange Pekoe Orange Pekoe
☐	98	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:13 PM	148156	FIL-2021-00055	Lady Grey
☐	97	PAYMENT	Prepaid Account	-\$225.00	3/9/2021 4:48:12 PM	148156	FIL-2021-00053	Earl Grey Earl Grey
☐	96	DEPOSIT	EFT	\$5,000.00	3/9/2021 2:20:58 PM	148155		

Confirming Renewal Completion

 Main Menu

Home / [Licenses](#)

Download/export selected

Add to Payment Items

Quick Search

Payment Items (0)

Logout

☐	Licence Number	Licence Type	Licence Status	Licensee Name	City	Action	Next Renewal Date
☐	LIC-2023-0039630-R01	General Licence - Individual	Active	Jasmine Green	Vancouver		2024-06-01
☐	LIC-2023-0039629-R01	General Licence - Individual	Active	Earl Grey	Vancouver		2024-06-01
☐	LIC-2023-0039628-R01	General Licence - Individual	Active	Lady Grey	Vancouver		2024-06-01
☐	LIC-2023-0039627-R01	General Licence - Individual	Active	Dar Jeeling	Vancouver		2024-06-01
☐	LIC-2023-0039626-R01	General Licence - Individual	Active	Orange Pekoe	Vancouver		2024-06-01
☐	LIC-2023-0039624-R01	General License - Corporate	Active	Cup of Tea Insurance Agency Ltd.	Vancouver		2024-06-01
☐	LIC-2023-0039623-R01	General Licence - Individual	Active	Camomile Chai	Vancouver		2024-06-01

Annual Licence Renewal Questions



Let's Work Together



- Get started early! We're here to help.
- Don't hesitate to use the *I've forgotten my password* button. A portal account will lock after 10 incorrect password attempts and we will need to unlock it.
- We recommend using a personal email for your portal account, but an email you check regularly as your contact email address.
- Every licensee already has a portal account and does not need to register for a new one.

Declaration Questions?

For practice-related inquiries:

View the Licensee Resources on our **website**:
www.insurancecouncilofbc.com

Email us:
practice@insurancecouncilofbc.com

Call us:
604-695-2008 (or toll free at 1-877-688-0321)
and press 3



A licensee not displaying on the nominee or delegate's portal account?

For ATR-related inquiries:

Email us:

licensing@insurancecouncilofbc.com

Call us:

604-695-2007 (or toll free at 1-877-688-0321)
and press 2



Any other questions?

For portal-related inquiries:

View the Online Portal page under
Licensee Resources on our **website:**

www.insurancecouncilofbc.com

Call us:

604-688-0321 (or toll free at 1-877-688-0321)
and press 6 for portal support

Email us: portal@insurancecouncilofbc.com



Questions?



Upcoming Webinars



Annual Renewal Webinars

- Agency / Firm Renewal – March 21 @ 9am PDT
- Individual Licensee Renewal – March 28 @ 9am PDT

Continuing Education Requirements & Guidelines

- March 16 @ 12:00pm PDT
- March 23 @ 12:00pm PDT

These webinars will also be recorded and/or available to view on demand later in March – check out our website to register and/or view the recordings.

Thank you for
joining us

