Secure Online Services Account (SOSA) User Guide

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Administrator Options

What follows are the instructions for using the Administrator Options of the WCRIBMA Secure Online Services Account (SOSA). These options are available once the user has logged into SOSA using their User ID and Password. Please note that your account role (*Group Administrator, Administrator, User or Business Segment User*) determines which of the following options are available to you.

View Your Member Information – This option is available to all accounts. Each user has the ability to view their own account information, which includes the following Information: Name, Login Role, Address, Phone, Email, Last visited, Times logged in and Group Information (Group, Administrator and Group Administrator).

TO VIEW YOUR MEMBER INFORMATION:

1. Log into SOSA
2. Click on '*View your member information*' link located beneath your name.

User List Report – This option is available to Group Administrators. The User List Report provides basic information for all accounts with in a group by User ID. The basic information includes the following:

- Account status (*Active=True or Inactive=False*)
- First Name
- Last Name
- User Type (*User, Business Segment User, Group Administrator, Administrator*)
- Business Segment ID (*if any*)
- Email
- For Each Product:
    - Product Access (*True or False*)
    - View Only/Full Access (View Only=*True or Full=False*)

TO VIEW USER LIST REPORT:

1. Click '*User List Report*' link located beneath **Administrative Options**
2. Click '*View [Group Name] user list*' link to view the user list report

Add Members – This option is available to Group Administrators and Administrators and provides the ability to create and add new accounts. Group Administrators have the ability to add accounts with the role of Administrator, User and Business Segment User. Administrators have the ability to add accounts with the role of User and Business Segment User only.

Users will report directly to the party that created the account for them. New accounts only exist within the group that they are created and only have access to those products that are assigned to them via the creating party or higher authority.

TO ADD ACCOUNT:

1. Click '*Add Member*' link located beneath **Administrator Options**
2. Enter the following information:
    a. Role (User, Business Segment User or Administrator)
    b. First name
    c. Last name
    d. User ID
    e. Password
    f. Email
    g. Phone
    h. Address
    i. City
    j. State
    k. Zip
    l. Status
3. When finished entering information, select '*Add Member*' button (confirmation message will appear upon successful update)
4. Within "Add/Remove Products for Member" section, select '*Add/Remove*' link in "Add/Remove" column of the row for appropriate product (Adding a product will place an "X" in "Selected" column and update "Date Added" column with current date/time)
5. Within "Add/Remove Products for Member" section, select checkbox in "View Only Access" column of the row for appropriate product (use the following KEY as guide for checkbox values)
6. Click '*Finished*' button

***KEY - View Only Access**

	Checkbox State	Level of Access
☑	Checked	Indicates that the View Only has been turned on and therefore the user has "View Only" access to the product
☐	Unchecked	Indicates that the View Only has been turned off and therefore the user has "Full" access to the product
	No Checkbox	Indicates that the View Only is not applicable to this product

Edit Member – This option is available to Group Administrators and Administrators and provides the ability to edit accounts within a group. Group Administrators have the ability to edit any account in the group. Administrators can only edit those accounts that they have created. Update capabilities include the following:

- Editing Account Information
- Changing User ID
- Setting/Resetting Password

- Activating/Inactivating Account Status
- Add/Remove Products
- Set “View Only” Access to Products
- View/Add Account History

TO EDIT ACCOUNT INFORMATION:

1. Click ‘*Edit Member*’ link located beneath **Administrator Options**
2. Enter “Search for member” criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click ‘*Search members*’ button
4. Select account you would like to edit
5. Within “Member Information” section the following information may be edited:
    a. Role (User or Business Segment User)
    b. First name
    c. Last name
    d. Email
    e. Phone
    f. Phone Ext
    g. Fax
    h. Address
    i. City
    j. State
    k. Zip
6. When finished editing information, select ‘*Update the member information above*’ button (confirmation message will appear upon successful update)
7. If editing account information is complete, select ‘*Close Window*’ link

TO CHANGE USER ID:

1. Click ‘*Edit Member*’ link located beneath **Administrator Options**
2. Enter “Search for account” criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click ‘*Search members*’ button
4. Select account you would like to edit
5. Within “Member Information” section, enter new “User ID”
6. Select ‘*Change User ID*’ button (confirmation message will appear upon successful update)
7. If editing account information is complete, select ‘*Close Window*’ link

TO SET ACCOUNT PASSWORD = USER ID:

1. Click ‘*Edit Member*’ link located beneath **Administrator Options**
2. Enter “Search for member” criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click ‘*Search members*’ button
4. Select account you would like to edit
5. Within the “Set Member Password = User ID” section, enter “Comment” (optional)

6. Select '*Set Password = User ID*' button (confirmation message will appear upon successful update)
7. If editing account information is complete, select '*Close Window*' link

TO CHANGE ACCOUNT STATUS:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for account" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Within "Change Member Status" section, enter "Comment" (optional)
6. Select '*ACTIVE – click to inactivate*' button or 'INACTIVE – click to activate' button (confirmation message will appear upon successful update)
7. If editing account information is complete, select '*Close Window*' link

TO ADD/REMOVE PRODUCTS FOR ACCOUNT:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for account" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Within "Add/Remove Products for Member" section, select '*Add/Remove*' link in the "Add/Remove" column of the row for the appropriate product (Adding a product will place an "X" in "Selected" column and update "Date Added" column with current date/time)
6. If editing account information is complete, select '*Close Window*' link

TO SET "VIEW ONLY" ACCESS:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for account" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Within "Add/Remove Products for Member" section, select the checkbox in the "View Only Access" column of the row for the appropriate product (use the following KEY as guide for checkbox values)
6. If editing account information is complete, select '*Close Window*' link

TO VIEW/ADD ACCOUNT HISTORY:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for member" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Within "Member History" section, select '*View/Add history*' link
6. Review "Member History", enter "Comment" and select '*Add comment*' button (optional)

7. If view/add account history is complete, select '*Close Window*' link
8. If editing account information is complete, select '*Close Window*' link

Replace Administrator – This option is available to Group Administrators. Group Administrators have the ability to replace an existing Administrator with another account. The Administrator chosen to be replaced will be demoted the role of User and the account will be made inactive. The promoted User inherits all Administrator privileges and assumes management of all accounts created by former Administrator.

TO REPLACE ADMINISTRATOR:

1. Click '*Replace Administrator*' link located beneath **Administrator Options**
2. Click '*Replace Administrator*' button
3. Follow the step-by-step instructions within "Replace Administrator Option"

NOTE: Please contact the WCRIBMA Technical Support (WCRIBMA-TechSupport@wcribma.org) if a Group Administrator change is required.

Promote to Administrator – This option is available to Group Administrators. Group Administrators have the ability to promote a User to Administrator. The promoted User inherits all Administrator privileges but does not assume management of any accounts. The promoted User retains product access levels as previously held. Please note that Business Segment Users cannot be promoted to Administrators.

TO PROMOTE TO ADMINISTRATOR:

1. Click '*Promote to Administrator*' link located beneath **Administrator Options**
2. Click '*Promote Administrator*' button
3. Follow the step-by-step instructions within "Promote to Administrator Option"

NOTE: Please contact the WCRIBMA Technical Support (WCRIBMA-TechSupport@wcribma.org) if a Group Administrator change is required.

Business Segment Identifier

The Business Segment Identifier is an optional data field that can be reported in the electronic header record of each Policy and Unit Statistical Report (USR). This field allows carriers the option to provide a coding device to the Bureau, to use for identifying any subset of that carrier's policy or USR data. The insuring carrier can then provide or limit access to the data identified with the Business Segment Identifier in select Bureau's SOSA products. The following SOSA products have been enhanced so that our members are able to secure Business Segment Users to only the data reported with their associated Business Segment Identifier:

- Manage Policy
- Manage USR
- WCRATINGS

*Please note that securing a Business Segment User to any product that has not been enhanced for Business Segment Identifier usage will result in the Business Segment User having access to ALL group data.

Creating A New Business Segment – This option is available to Group Administrators and Administrators. This feature enables groups to take advantage of the security benefits for data reported with the Business Segment Identifier (BSI). To do so, they must first setup the appropriate Business Segment in SOSA.

TO ADD BUSINESS SEGMENT:

1. Click '*Add Member*' link located beneath **Administrator Options**
2. Select "Bus Segment User" from the '*Role*' dropdown menu
3. Select '*Add new Business Segment to Group*' link
4. Enter Business Segment ID
5. Enter Business Segment Name
6. Select '*Add Business Segment*' button
7. Select '*Retry*' button
8. Enter the following information:
    a. First name
    b. Last name
    c. User ID
    d. Password
    e. Email
    f. Phone
    g. Address
    h. City
    i. State
    j. Zip
    k. Status

9. When finished entering information, select '*Add Member*' button (confirmation message will appear upon successful update)
10. Within "Add/Remove Products for Member" section, select '*Add/Remove*' link in "Add/Remove" column of the row for appropriate product (adding a product will place an "X" in "Selected" column and update "Date Added" column with current date/time)
11. Within "Add/Remove Products for Member" section, select checkbox in "View Only Access" column of the row for appropriate product (use the following KEY as guide for checkbox values)
12. Click '*Finished*' button

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	Checkbox State	Level of Access
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Update Existing User to Business Segment User – This option is available to Group Administrators and Administrators. Existing users can be updated to have limited access to Group data based on Business Segment Identifier.

TO UPDATE USER TO BUSINESS SEGMENT USER IN EXISTING BUSINESS SEGMENT:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for member" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Select "Bus Segment User" from '*Role*' dropdown menu
6. Within "Assign/Change Business Segment for User" section, select [Business Segment] from '*Business Segment*' dropdown menu
7. Select '*Update the member information above*' button (confirmation message will appear upon successful update)
8. If editing account information is complete, select '*Close Window*' link

TO UPDATE USER TO BUSINESS SEGMENT USER IN NEW BUSINESS SEGMENT:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for account" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Select "Bus Segment User" from '*Role*' dropdown menu
6. Within "Assign/Change Business Segment for User" section, select '*Add new Business Segment to Group*' link

7. Enter Business Segment ID
8. Enter Business Segment Name
9. Select '*Add Business Segment*' button
10. Select '*Retry*' button
11. Select '*Update the member information above*' button (confirmation message will appear upon successful update)
12. If editing account information is complete, select '*Close Window*' link

View Only Access

SOSA has been enhanced to incorporate a "View Only Access" function. This enhancement gives Group Administrators and Administrators the ability to grant "View Only" access capabilities to selected accounts. A User who has been granted "View Only" access cannot add or update data for the associated product, the user will only have the ability to view data for the associated product.

TO SET "VIEW ONLY" ACCESS:

1. Click '*Edit Member*' link located beneath **Administrator Options**
2. Enter "Search for member" criteria (leaving the search criteria blank will return a listing of all accounts available for editing)
3. Click '*Search members*' button
4. Select account you would like to edit
5. Within "Add/Remove Products for Member" section, select checkbox in "View Only Access" column of the row for appropriate product (use the following KEY as guide for checkbox values)

***KEY - View Only Access**

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We hope you find these instructions to be helpful and the Secure Online Services Account to be user-friendly and valuable. If you have any questions and/or concerns regarding these instructions or a Secure Online Services Account, please contact the WCRIBMA Technical Support (WCRIBMA-TechSupport@wcribma.org).