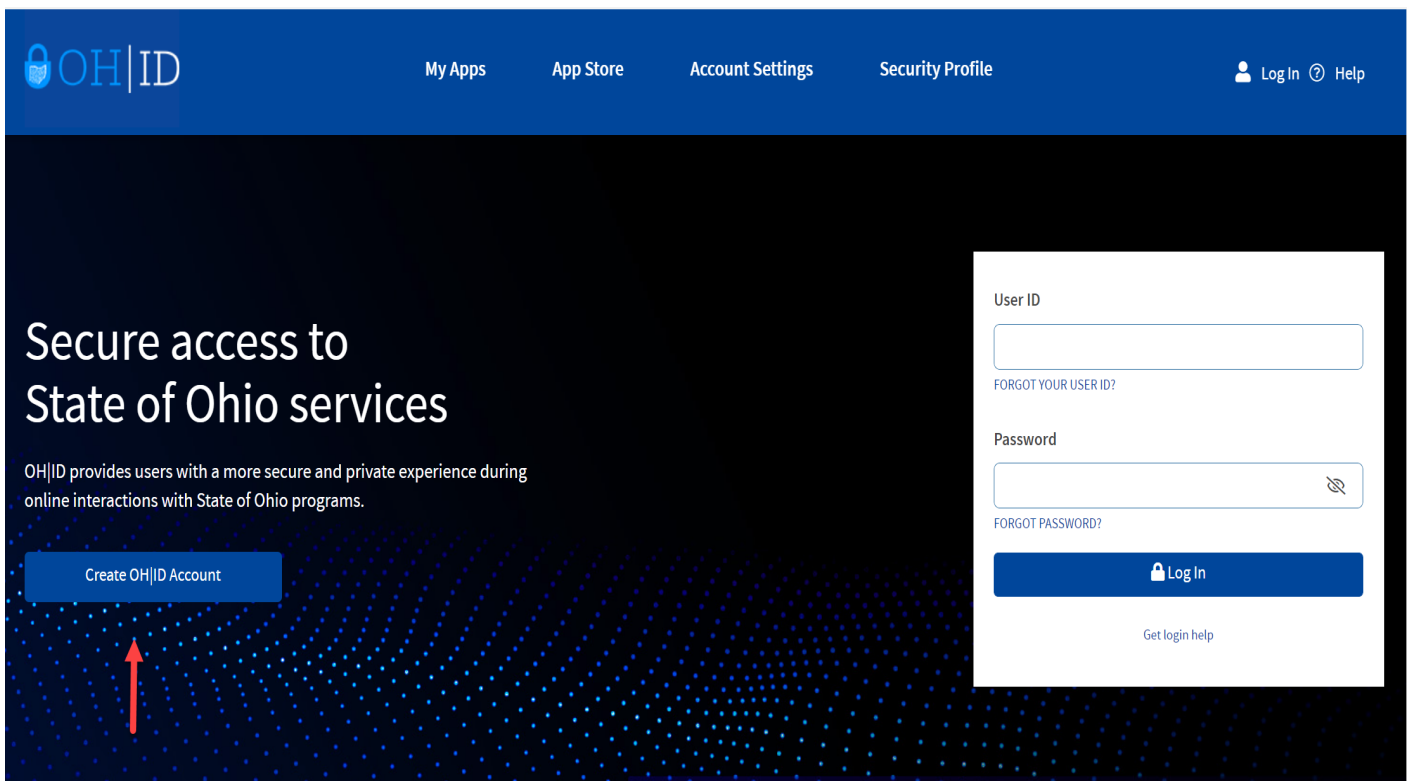


Purpose: This Document serves as a user guide on how to create a new OH|ID Account and link with Ohio Department of Insurance account.

- **DO NOT** create multiple OHID accounts as one ID can be used to link to multiple agency applications including the Ohio Department of Insurance Gateway Application.
- In addition, **DO NOT** use a generic email address in your account setup, you should only use your individually assigned (e.g. - john@abcinsurance.com) business email address.

Creation of new OH|ID account.

- Users can access the OH|ID portal directly at ohid.ohio.gov and they will be redirected to the screen below.



- Click “Create OH|ID Account” to be redirected to create new account application and fill in the requested details.
- “Create OH|ID” is a 6 step process, follow the below instructions to complete the step by step process to create a new OH|ID account.

- Step 1: Enter and confirm your email address and click “send PIN”

Create OH|ID Account

- Email Verification**
- Personal Info
- Pick a Username
- Create Password
- Account Recovery
- Terms & Conditions

Email Verification

With one OH|ID account, you can sign in to multiple State of Ohio agency systems more securely.

You need an active email address to create an OH|ID account. Need to create one? Companies such as [Google](#), [Microsoft](#), [AOL](#), and [Yahoo](#) offer free email accounts.

We need to verify the email address you want to use for your OH|ID account. A one-time PIN will be emailed to the email address you provide below.

Email Address: john@abcinsurance.com Confirm Email Address: john@abcinsurance.com

Cancel **Send PIN**

Keeping Your Information Safe

OH|ID respects your privacy. All the data we collect is to give you a better and more secure service. OH|ID does not lease, sell, or release your information to private companies, contractors, or vendors for any purpose.

- Step 2: Enter the PIN which is sent to the email address you provided and click ‘verify’.
- ‘Send me a new PIN’ option can be used if you do not receive a pin after 10 minutes of clicking verify.
- Step 3: Click ‘next’ to proceed to the next step.

Create OH|ID Account

- Email Verification**
- Personal Info
- Pick a Username
- Create Password
- Account Recovery
- Terms & Conditions

Email Verification

An email with a one-time PIN was sent to odi.sso.test+160@gmail.com.

Enter PIN: 514484 **Verify**

Having Trouble?

- Search your junk mail and spam folder for an email from: DONOTREPLY-EnterpriseIdentity@ohio.gov.
- Wait 10 minutes and refresh your email inbox.

Still Having Trouble?

Your email provider is likely marking this email as spam, which is blocking or delaying it.

- Add DONOTREPLY-EnterpriseIdentity@ohio.gov to your contacts.
- Ask your IT administrator to add this email to the safe-sender list.

Send me a new PIN

Cancel **Next**

- Step 4: Fill in the required details under personal info and click next.

Create OH|ID Account

Personal Info

Legal First Name: Test

Legal Last Name: Name

Date of Birth: 01/01/2000

Last 4 digits of SSN (optional): 1234

Be sure to use your real date of birth, you may need it for account recovery later.

Cancel

Next

- Step 5: Pick a username which follows the username requirements and click next
Note: we highly recommend you use a username with your name followed by '@odi'

Create OH|ID Account

Pick a Username

Username Requirements

- Must be between 6-64 characters
- Cannot start or end in a special character
- Cannot contain only numbers
- Only . _ - or @ No other special characters

Username: test.160@odi

Cancel

Next

- Step 6: Create password which follows the password requirements and click 'Next'.

Create OH|ID Account

- ✓ Email Verification
- ✓ Personal Info
- ✓ Pick a Username
- 4 Create Password**
- 5 Account Recovery
- 6 Terms & Conditions

Create Password

Password Requirements

- Must have at least 8 and no more than 30 characters in length
- Must contain 1 character from each of the following categories:
 - Upper case letters (A-Z)
 - Lower case letter (a-z)
 - Numbers (0-9)
 - Special characters (!\$#,%@-~^&*_-+=<>(){}[]%";:~\/?')
- Cannot include your first name, last name, username, or OH|ID
 - Example: If your name or username is John Smith, your password cannot contain "John" or "Smith"

Password Confirm Password

- Step 7: Under Account recovery click 'skip this step' to set up account recovery at a later time. (You can also setup account recovery by entering your mobile number and verifying the PIN sent).
- Step 8: Click next to proceed further.

Create OH|ID Account

- ✓ Email Verification
- ✓ Personal Info
- ✓ Pick a Username
- ✓ Create Password
- 5 Account Recovery**
- 6 Terms & Conditions

Account Recovery

Your email (odi.sso.test+160@gmail.com) is the main way you'll reset your password. Adding your mobile number to your account ensures that we have a way to reach you if you lose access to your email.

Set up mobile/text message account recovery

You will receive a PIN via text message. Message and data rates apply. [See Terms & Conditions and Privacy Policies.](#)

Mobile Number

If you choose not to add your mobile number to your account at this time, you can [skip this step.](#)

- Step 9: Click 'I Agree' after reading through the terms & conditions.
- Step 10: Complete the verification question and click 'verify'.

- Step 11: Click 'Create Account' to complete the account creation process.

Create OH|ID Account

- ✓ Email Verification
- ✓ Personal Info
- ✓ Pick a Username
- ✓ Create Password
- ✓ Account Recovery
- 6 Terms & Conditions**

Terms & Conditions

In order to proceed with creating your account, you must agree to the following terms and conditions.

By clicking "I Agree" and creating an OH|ID account, you consent to use electronic signatures with the State of Ohio and receive communications in electronic form.

If you use this site, you are responsible for maintaining the confidentiality of your OH|ID account(s) and password(s) and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your OH|ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right, in the event of a violation of law or State of Ohio policy, or as a result of any suspicious activity occurring on your OH|ID account, to refuse service, terminate accounts, remove or edit content on ohid.ohio.gov, or cancel transactions related to your OH|ID account.

I Agree **Step 1**

Confirm you are not a robot

"doctoring" has how many letters?

9

Step 2 **Step 3** **Step 4**

Cancel

Create OH|ID Account

- ✓ Email Verification
- ✓ Personal Info
- ✓ Pick a Username
- ✓ Create Password
- ✓ Account Recovery
- ✓ Confirmation

Check your Email

We are working to create your new OH|ID account. This may take a few seconds or a few minutes.

OH|ID: test.160@odi
Email: odi.sso.test+160@gmail.com

Once you receive a confirmation email, return here to [log in to OH|ID](#).

log in to OH|ID

- Step 13: enter the username and password created and click 'log in'.

Secure access to State of Ohio services

OH|ID provides users with a more secure and private experience during online interactions with State of Ohio programs.

Create OH|ID Account

User ID

oditest24@odi

[FORGOT YOUR USER ID?](#)

Password

.....

[FORGOT PASSWORD?](#)

Log In

[Get login help](#)

- Continue to “Match Ohio Department of Insurance Account with OH|ID” section on the next page to get access to the ODI Gateway

Language Translation An Official Site of Ohio.gov

OH|ID SECURITY DEVELOPERS MANAGE OH|ID ACCOUNT Logout Help Search

MY APPS APP STORE ACCOUNT SETTINGS SECURITY LEVEL RECENT ACTIVITY DEVICES

Account Settings

Choose from the options below to make changes to your account.

Account Action

- EDIT PERSONAL INFORMATION, EMAIL, OR MOBILE
- CHANGE MY PASSWORD
- DEACTIVATE MY OH|ID ACCOUNT
- LINK MY OH|ID ACCOUNT TO MY OHIO DRIVER LICENSE AND IDENTIFICATION (DL-ID) CARD

Security Options

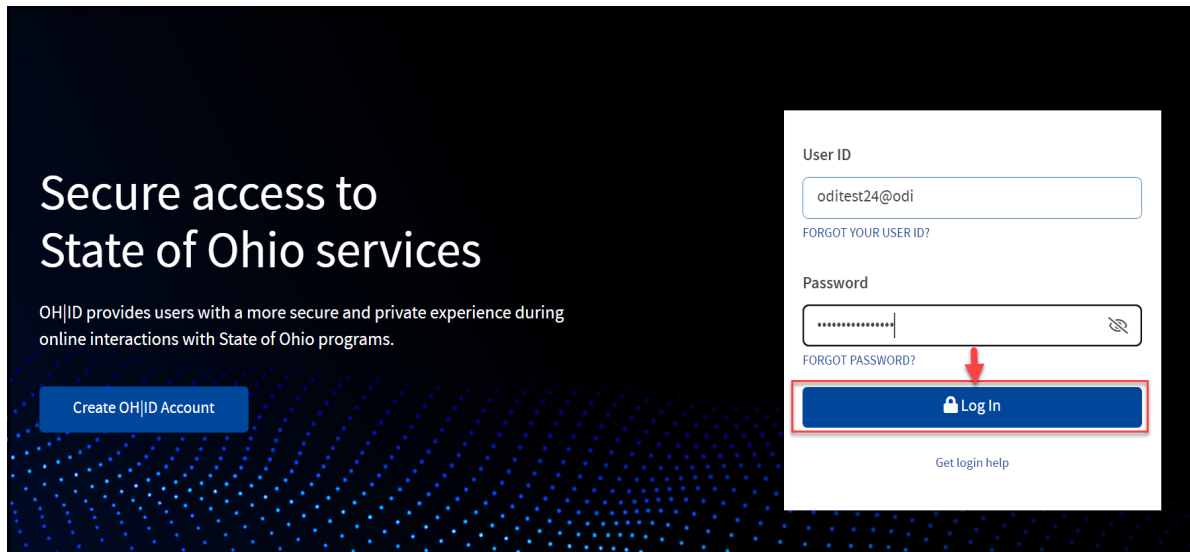
- SECURITY OPTIONS
- MANAGE MY DEVICES

- Select the “App Store” tab and you can access the catalogue of the available applications.
- Select “Account settings” to edit preferences to the Account.

1. Log into “OH|ID”

- Users can access the OH|ID portal directly by clicking [here](#) and they will be redirected to OH|ID Login.

Figure 1:

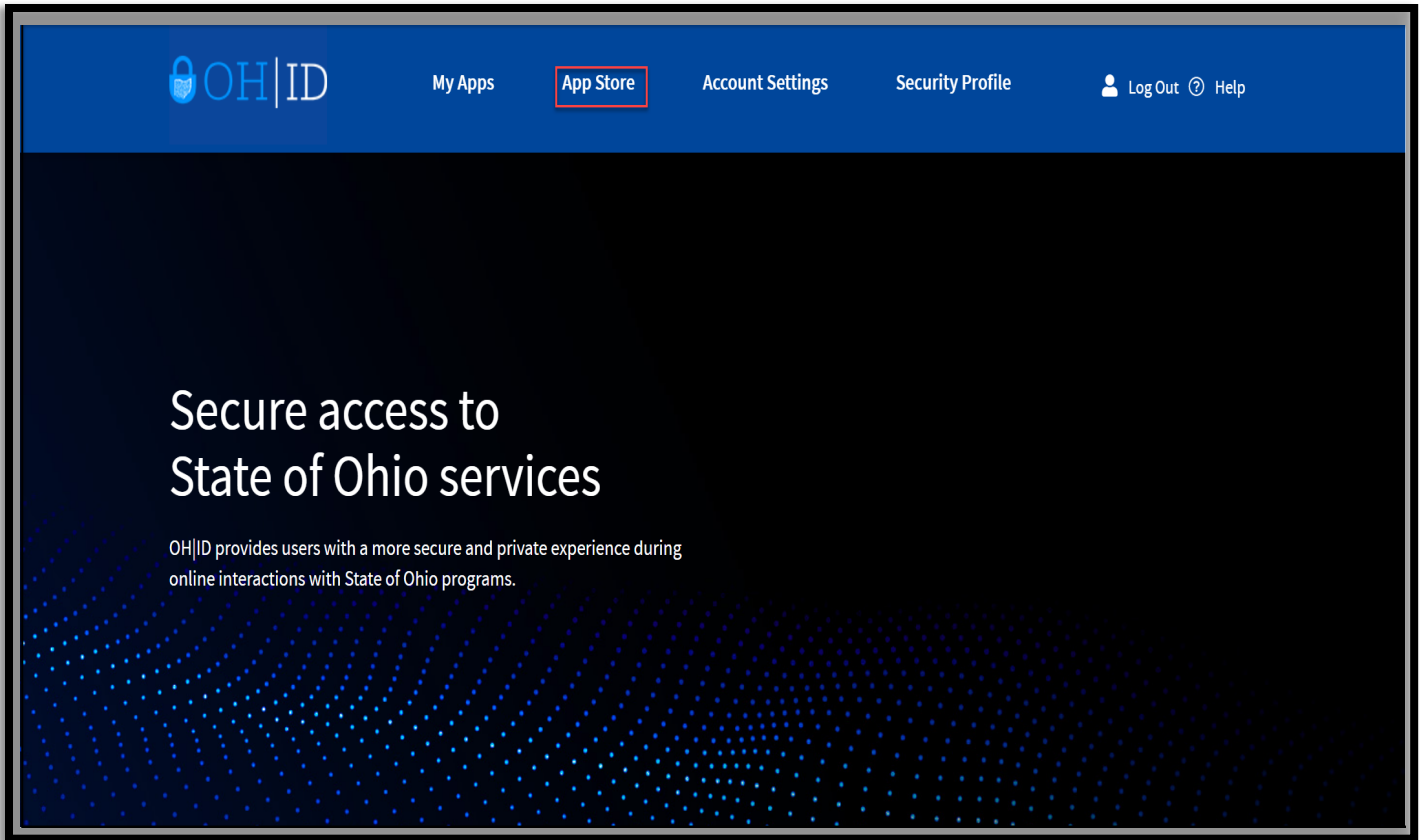


- Enter the username and password you created and click “Log in”.
- If you forgot your OH|ID Password click [here](#) to be redirected into OH|ID help portal for instructions on how to reset password.

2. Locate the App Store:

- At the top of the screen, in the blue ribbon, click “App Store” to view the dedicated Application Store tab.
- If you don’t have any applications yet follow step 3 and step 4 to search and request access to the Application.

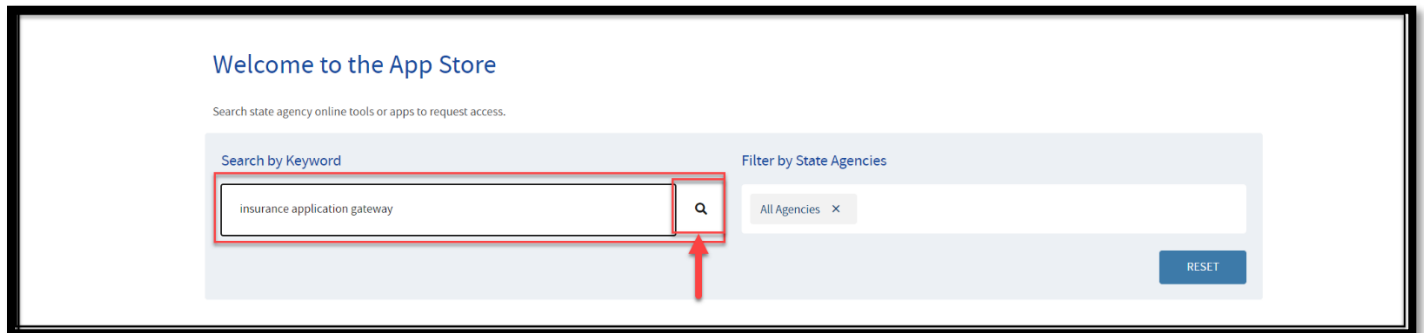
Figure 2:



3. Search for an Application

- Once logged in click on the “APP STORE” tab and you will be redirected to the catalog menu where you would be able to find the applications using the search tab.
- In the search bar enter “Insurance Application Gateway”. To view results, click the search icon.
Note: You can also find “Insurance Application Gateway” by selecting ‘Department of Insurance’ in ‘Filter by Agencies’ dropdown.
- Select “Insurance Application Gateway” tile.

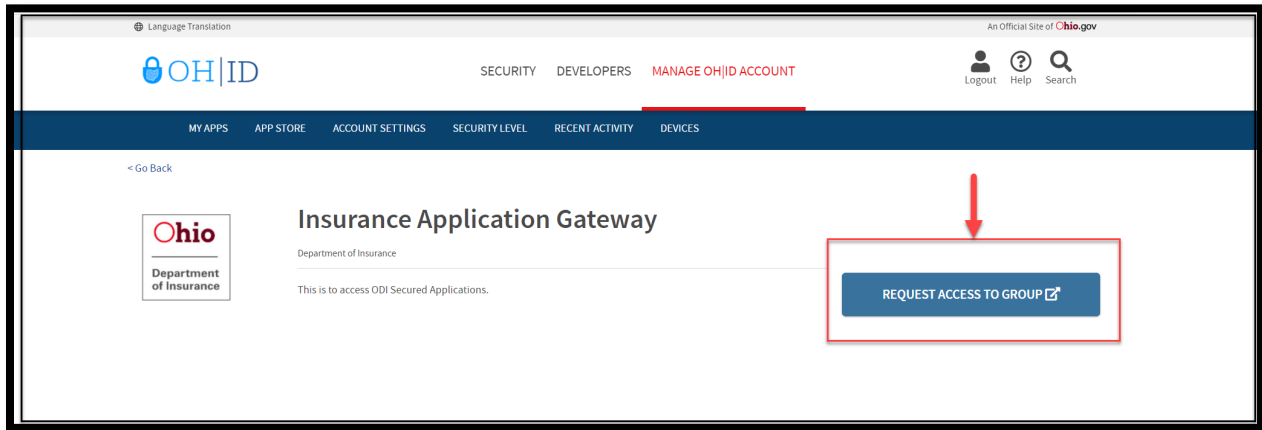
Figure 3:



4. Request Access to Group

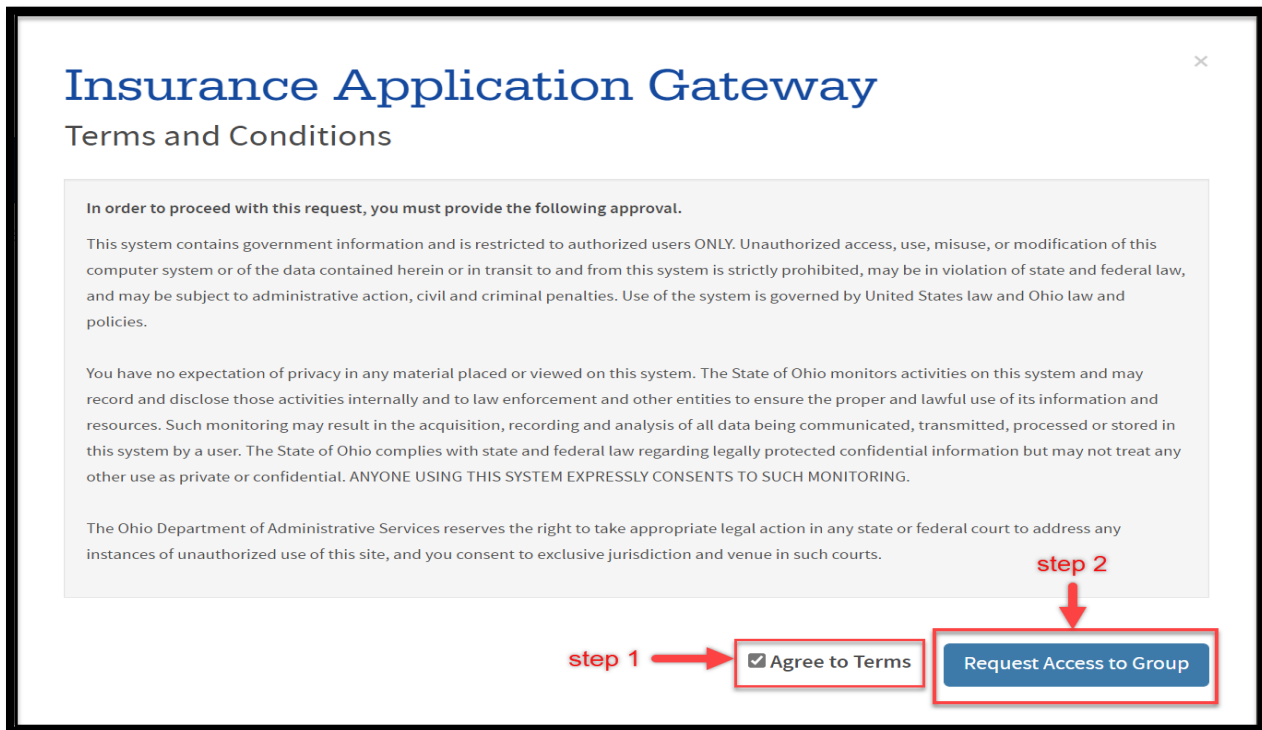
- Click “Request Access to Group” for the application you would like access.

Figure 4:



- A pop-up window would appear with the terms and conditions. Click “Agree to Terms” and select “Request Access to Group”

Figure 4.1:

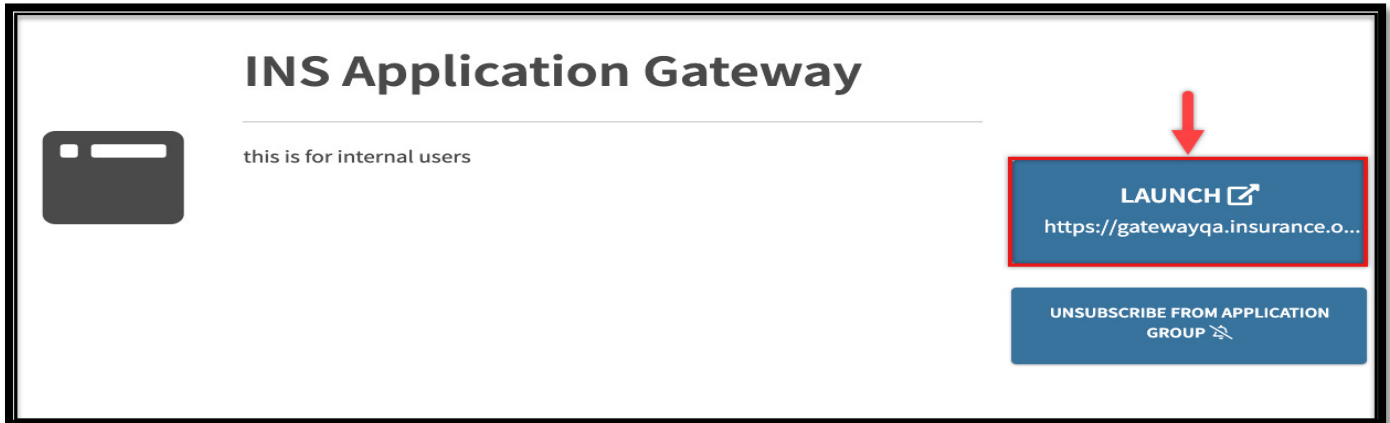


5. Launch the application that has been given access

- Click the “Launch” tab to proceed into logging into INS Application Gateway.

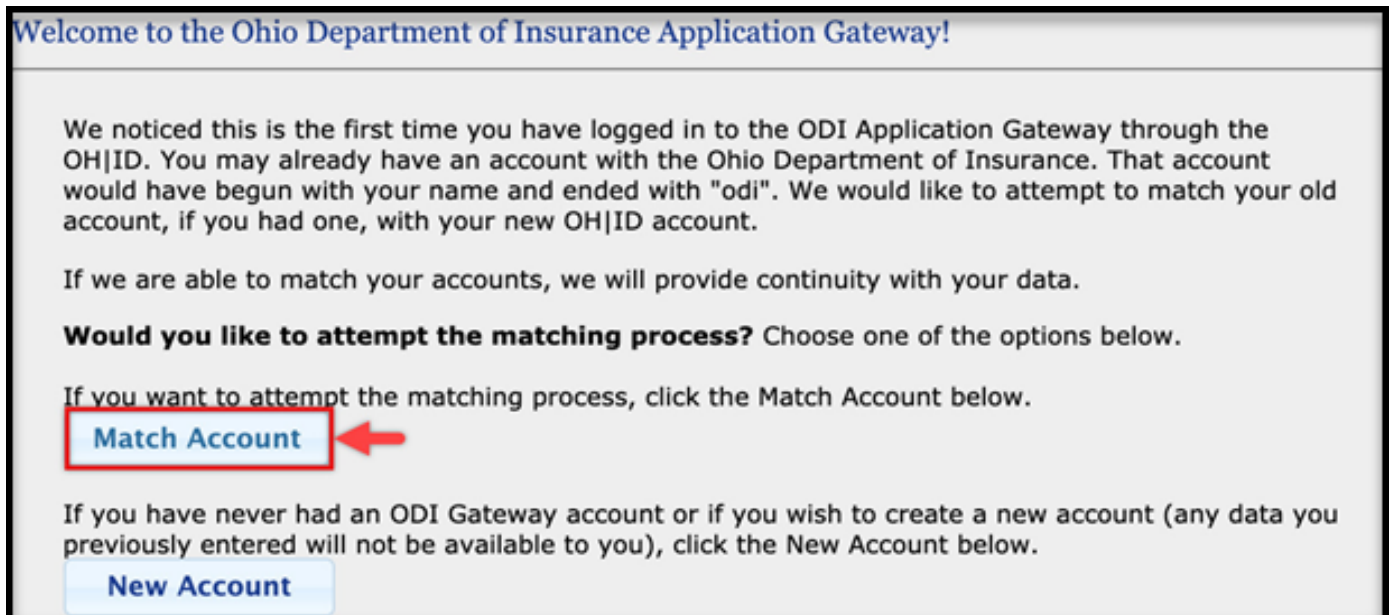
Note : Application access would be granted automatically once approved, refresh screen if not refreshed automatically to continue to INS Application Gateway.

Figure 5:



6. Select Match Account in Application Gateway

Figure 6:



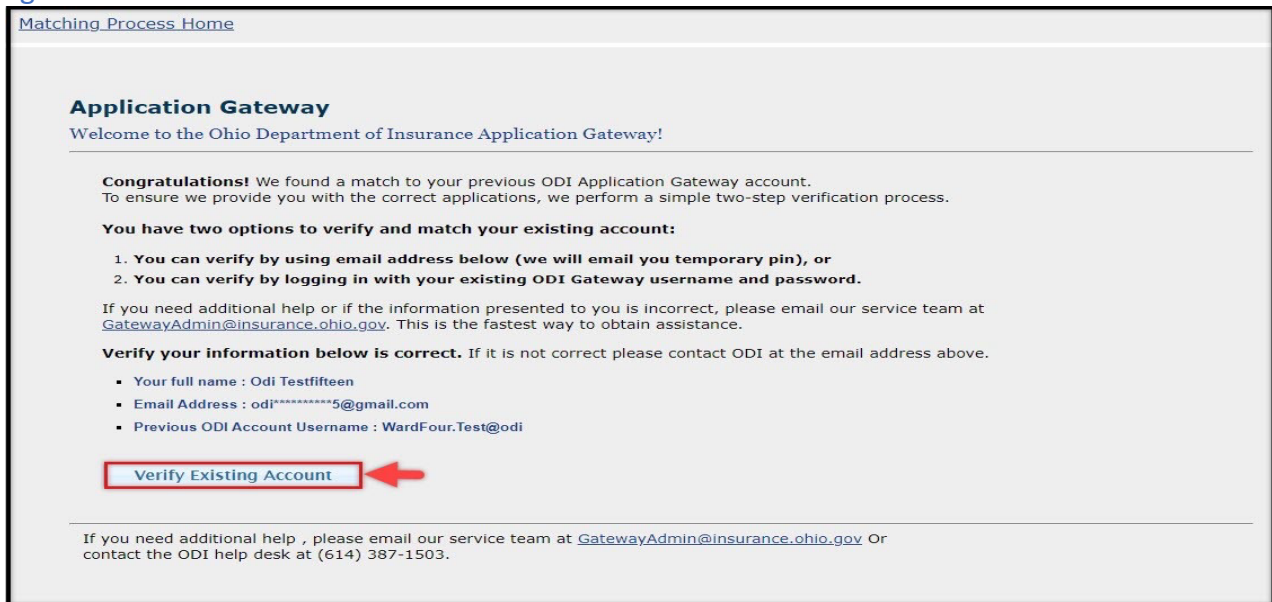
- Click “Match Account” if you have an existing Department of Insurance account and wish to link it to OH|ID account.

7. Match your OHID account with existing ODI account

Scenario 1: Automatic Match.

If your email for OHID account and ODI account are the same you will automatically be matched.

Figure 7:



Your account is matched and linked. Go to [step 10](#) for verification process.

Scenario 2: Match with ODI credentials

Your Email is not matched automatically so enter existing ODI Gateway account username and password and click “Match & Sign in”.

Figure 7.1:

Application Gateway
 Welcome to the Ohio Department of Insurance Application Gateway!

We are sorry. We searched for an account using **email address** you entered when you created your OH|ID account, and **we could not find** an Ohio Department of Insurance Application Gateway account matching that email address. You may continue as a new user or you may ask Ohio Department of Insurance to attempt a manual match to your previous account.

To continue as **NEW USER**

If you had ODI gateway account, would like to try match that account ?

By logging in with existing ODI Gateway Account.

Please log in to verify your Existing Account.

Username

Password

Match & Sign in ←

If you need additional help , please email our service team at GatewayAdmin@insurance.ohio.gov Or contact the ODI help desk at (614) 387-1503.

NOTE: If you had provided 2 different email address (i.e) a different email address for OH|ID and a different email address for your existing Department of Insurance account you can still link the accounts by providing your existing Department of insurance login credentials and clicking “Match & Sign in”.

Your Account is matched. Go to [step 10](#) for verification process.

Scenario 3: Manual Match:

Figure 8:

[Matching Process Home](#)

Application Gateway
 Welcome to the Ohio Department of Insurance Application Gateway!

We are sorry. We could not find and Ohio Department of Insurance Gateway account matching that username and password. If the applications you have access to require continuity of the data you may request to manually match your account. Fill out following form and click "Send Email" to send an email to GatewayAdmin@insurance.ohio.gov. Someone from ODI will contact you at the phone number provided below to verify your details and match your account.

Your Full Name: **Odi Testfifteen**

The Email address used in the OH|ID: **oditestuser+ 15@gmail.com**

The Number in the OH|ID: **71990754**

The Email address used in the ODI Applications Gateway:

Your Username from the ODI Application Gateway:

Your Phonenumber from the ODI Application Gateway:

Send Email ←

- If we are unable to find and match the login credentials and you think the provided information is correct then you can request for a manual match where our help desk agent would be able to manually verify the information provided and link the accounts.

8. Verify using PIN.

Figure 9:

Application Gateway
Welcome to the Ohio Department of Insurance Application Gateway!

We have successfully sent your temporary PIN to your email address.

You can verify and match your previous ODI Gateway Account by selecting one of the options below.

Verify using a PIN we will email you.

Verify by providing your ODI Gateway Account username and password.

We will send a temporary PIN to **oditestuser+15@gmail.com**. Your PIN will expire in 30 minutes. **Send PIN**

Detailed description: This is a screenshot of a web application interface. At the top, it says 'Application Gateway' and 'Welcome to the Ohio Department of Insurance Application Gateway!'. Below that is a green message box stating 'We have successfully sent your temporary PIN to your email address.' Underneath, there is a heading 'You can verify and match your previous ODI Gateway Account by selecting one of the options below.' There are two radio button options. The first option, 'Verify using a PIN we will email you.', is selected and highlighted with a red box and a red arrow pointing to it from the left. The second option is 'Verify by providing your ODI Gateway Account username and password.' Below the options, there is a line of text: 'We will send a temporary PIN to oditestuser+15@gmail.com. Your PIN will expire in 30 minutes.' To the right of this text is a button labeled 'Send PIN', which is also highlighted with a red box and a red arrow pointing down to it.

- Selecting Verify using a PIN and clicking “Send PIN” sends a temporary pin (as seen in the image below) to the email address you provided.

Figure 10:

Hello **odi testtwentyfour**,

Please enter the following verification PIN. The PIN will expire in 30 minutes.

Verification PIN: **245768**

If you did not initiate this request, or feel you have received this message in error, please disregard and delete it.

Sincerely,
Ohio Department of Insurance

Detailed description: This is a screenshot of an email message. The text reads: 'Hello odi testtwentyfour,' followed by 'Please enter the following verification PIN. The PIN will expire in 30 minutes.' Below that, it says 'Verification PIN: 245768'. The number '245768' is highlighted with a red box and a red arrow pointing to it from the right. The message concludes with 'If you did not initiate this request, or feel you have received this message in error, please disregard and delete it.' and 'Sincerely, Ohio Department of Insurance'.

9. Entering PIN and clicking Submit.

Figure 11:

We will send a temporary PIN to **oditestuser+15@gmail.com**. Your PIN will expire in 30 minutes. **Send PIN**

Please enter your temporary PIN below.

Enter PIN:

Submit

Detailed description: This is a screenshot of a web application interface for entering a PIN. At the top, it says 'We will send a temporary PIN to oditestuser+15@gmail.com. Your PIN will expire in 30 minutes.' To the right of this text is a button labeled 'Send PIN'. Below that, there is a heading 'Please enter your temporary PIN below.' Underneath, there is a label 'Enter PIN:' followed by a text input field. Below the input field is a button labeled 'Submit', which is highlighted with a red box and a red arrow pointing to it from the right.

- Enter the PIN which was sent to you email address and click Submit.
(NOTE : You have 30 minutes to enter your pin and clicking submit after which the PIN expires and you have to request for a new PIN).

10. Verify by providing your existing Ohio Department of Insurance login credentials.

Figure 12:

Matching Process Home

Application Gateway

Welcome to the Ohio Department of Insurance Application Gateway!

You can verify and match your previous ODI Gateway Account by selecting one of the options below.

Verify using a PIN we will email you.

Verify by providing your ODI Gateway Account username and password.

Please enter the username and password for your previous ODI Gateway Account.

Username

Password

Match & Sign in

If you need additional help , please email our service team at GatewayAdmin@insurance.ohio.gov Or contact the ODI help desk at (614) 387-1503.

- Verify by providing the existing Department of Insurance login credentials and click “Match & Sign”.

11. Scenario 2 - Verify your information:

Figure 13:

Matching Process Home

Application Gateway

Welcome to the Ohio Department of Insurance Application Gateway!

You can verify and match your previous ODI Gateway Account by selecting one of the options below.

Verify using a PIN we will email you.

Verify by providing your ODI Gateway Account username and password.

We are able to successfully match your account with below mentioned ODI Gateway Account. Please click **Verify and Continue**.

Your Full Name:	Odi Testfifteen
The Email address used in the OH ID:	oditestuser+15@gmail.com
The Number in the OH ID:	71990754
The Email address used in the ODI Applications Gateway:	17oditestuser@gmail.com
Your Username from the ODI Application Gateway:	WardFour.Test@odi

Verify & Continue

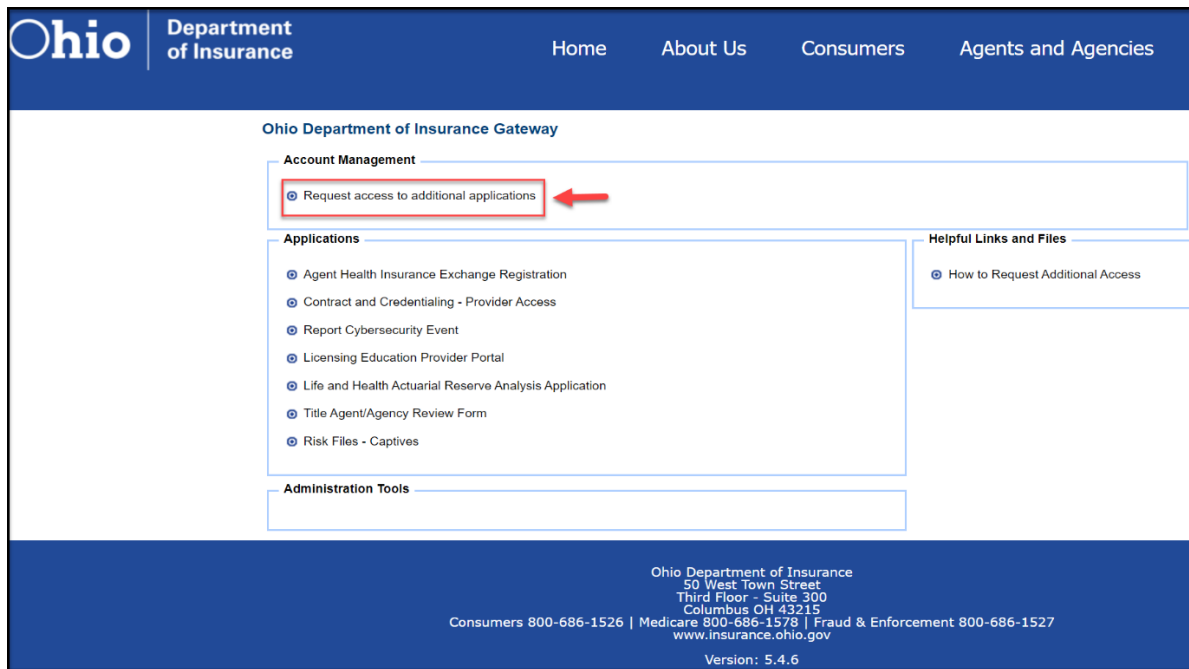
If you need additional help , please email our service team at GatewayAdmin@insurance.ohio.gov Or contact the ODI help desk at (614) 387-1503.

- Verify if the information on file is correct and click “verify and continue”.
- That is it! You have now matched your OH|ID Account with Department of Insurance Account. You will now be directed to the list of applications page.

12. List of applications & Request access to additional Applications :

- The Applications tab shows you the list of applications you have access to.
 - You can always request access to additional applications in the Account Management tab.
-
- Step 1: Click the “Request access to additional applications” link to start the request access process.

Figure 14:



- Step 2: select the desired application you would need access to and click “continue”.

Figure 14.1:

Ohio Department of Insurance Gateway

Request Additional Access

Please select the area you would like to access.

Some applications may not show up right away because they require that your company point of contact verify your employment before access can be granted. Once this process complete, the application will show up in your menu.

BUSINESS AREA AND/OR APPLICATION SELECTION

<input type="checkbox"/>	Education Provider Portal	Continuing Education Provider.
<input type="checkbox"/>	External Review - Health Plan Issuer (HPI) Access	Allows health plan issuers (HPIs) to submit and finalize external review cases.
<input type="checkbox"/>	External Review - IRO Access	Allows IROs to respond to external review cases to which they have been assigned.
<input checked="" type="checkbox"/>	Fiscal Epay	The application used to pay invoices sent by the Ohio Department of Insurance.
<input type="checkbox"/>	Licensing CE	This application is strictly limited to Prometric.
<input type="checkbox"/>	Life and Health Actuarial Reserve Analysis Application	Life and Health Actuarial Reserve Analysis Application
<input type="checkbox"/>	Medical Liability Data Collection Application	Users of this application report medical liability claims. If you are not reporting medical liability claims, you do not need to use this application.
<input type="checkbox"/>	ODI Secured Communications	Select if you received a message requiring a secure login to view a message from the Ohio Department of Insurance (ODI).
<input type="checkbox"/>	Premium Tax Application (NOT Surplus Lines or RRG)	Allows companies to file their ODI premium tax forms online. This application is NOT to be used by Surplus Lines tax reporters.
<input type="checkbox"/>	Prompt Pay Data Call Reporting Application	Allows insurance companies to submit prompt pay reporting data.
<input type="checkbox"/>	Provider Complaints - Insurance Company Access	Company access to the Provider Complaints (OCHAMP) application. (For insurance companies ONLY.)
<input type="checkbox"/>	Provider Complaints - Provider Access	Provider access to the Provider Complaints (OCHAMP) application. (For healthcare providers ONLY.)
<input type="checkbox"/>	Risk - Financial Statement Uploads	Upload MPP and MEWA electronic files for quarterly and annual financial statements.
<input type="checkbox"/>	Risk Coordinated Exams	Provides access to examiners and consultants enabling them to share work papers on coordinated exams.
<input type="checkbox"/>	Risk Exam File Uploads	Risk assessment exam file uploads. This application is to only be used by insurance companies needing to upload files in support of examinations conducted by ODI.
<input type="checkbox"/>	Secure File Transfer	ODI Secure File Transfer
<input type="checkbox"/>	Surplus Lines Reporting Application	Allows agents, agencies, and risk retention groups to report their Ohio surplus lines business.

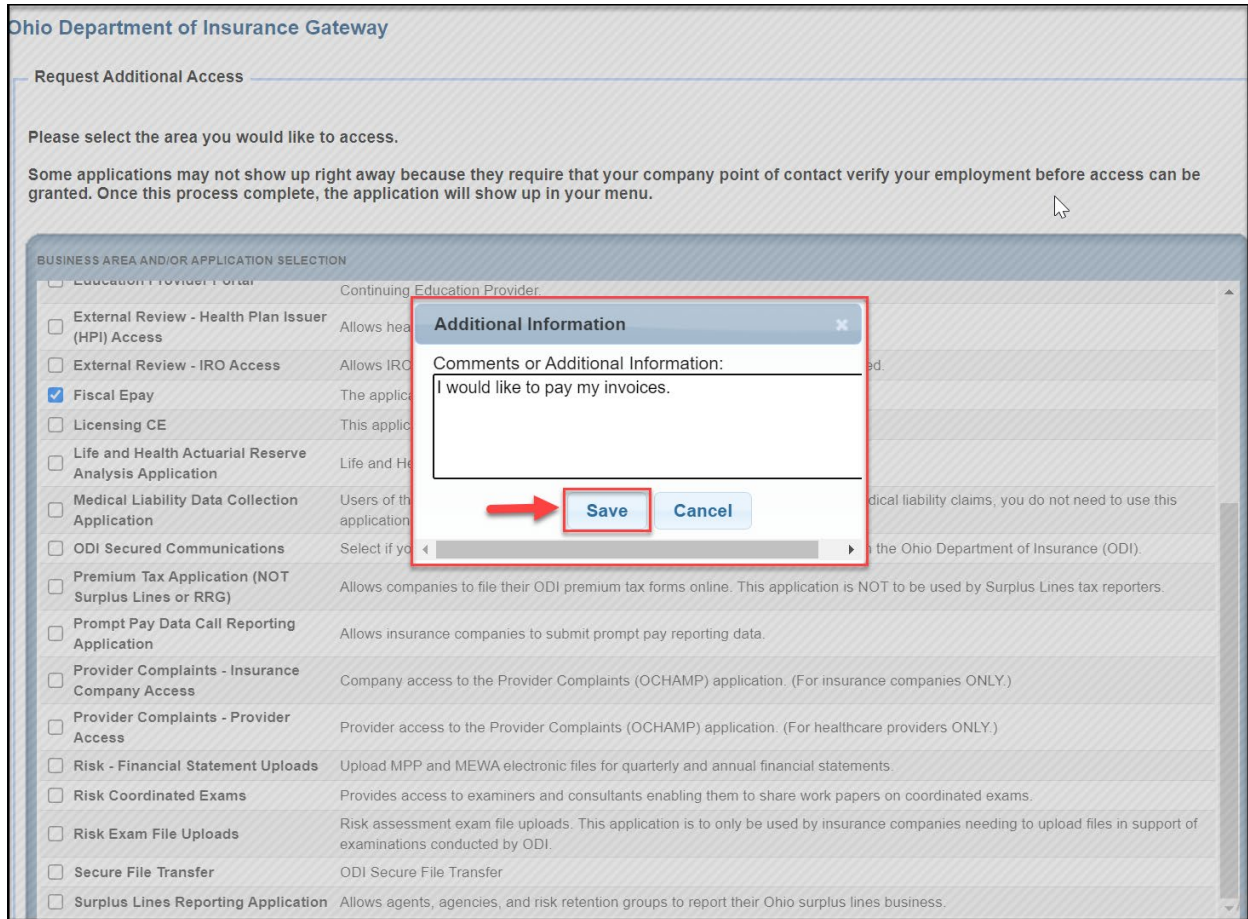
STEP 1: Select one or more Applications.

[Continue](#)

STEP 2: Click the continue Button

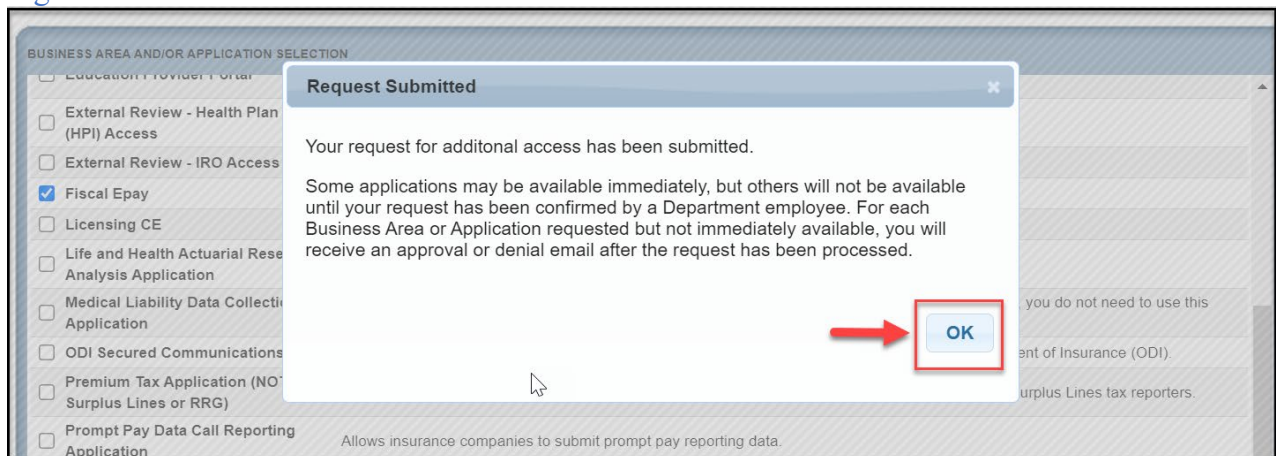
- Step 3: Add any additional information you could provide and click “save”.

Figure 14.2:



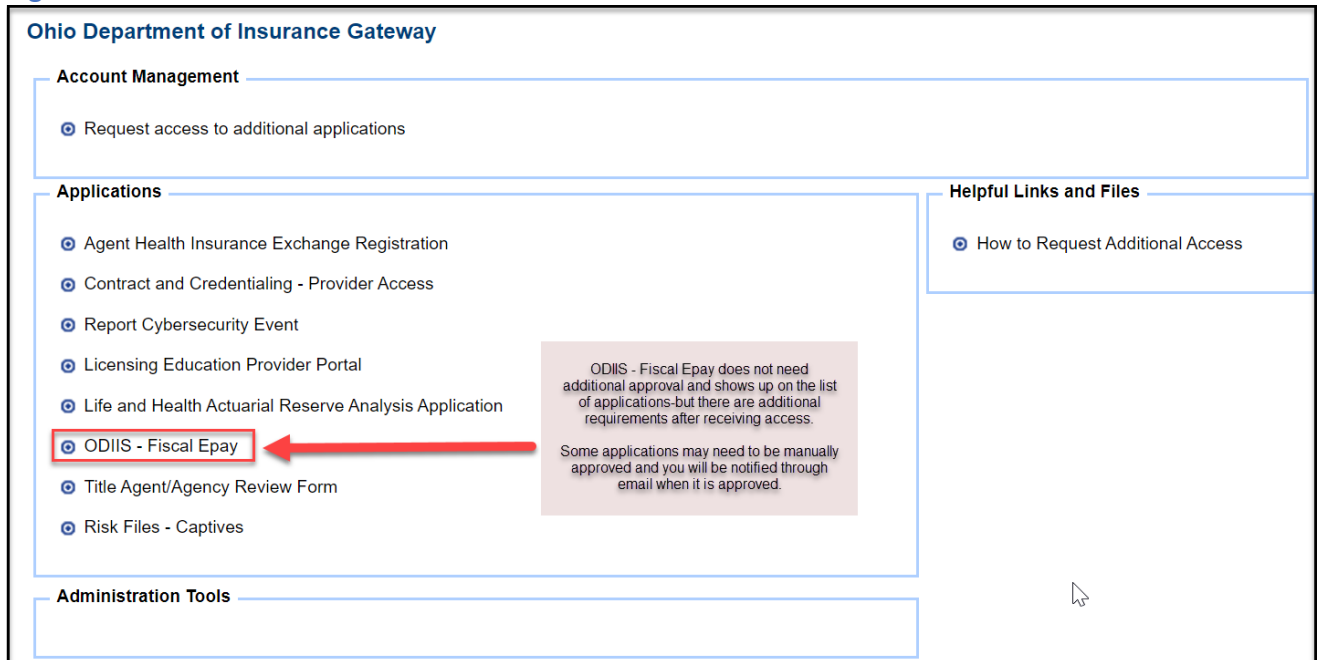
- Step 4: Once the request is submitted a pop-up will appear click “ok”

Figure 14.3:



- Step 5: You will be redirected to your list of approved applications. Some applications do not need approval and will be available immediately and a few would need manual approval by our representative and you would be notified through email once approved.

Figure 14.4:




- Step 6 Approval: If needed approval an email would be sent indicating approval or denial. If approved you will receive an email as shown below in figure 14.5

Figure 14.5:



- Step 6 Denial: Should your request be denied, you will receive an email such as the one shown in Figure 14.6.

Figure 14.6:

Reply Reply All Forward IM
Mon 5/23/2016 10:14 AM
 GatewayAdminQA@insurance.ohio.gov
ODI Account Notification - New Account Request Denied

ODI Account Notification

Your request to create an account with The Ohio Department of Insurance for Missing Life Policy Search has been denied.

Please review your request for errors and submit a new request if you would like to create an account.

Name: Saap Testino
Email Address: Saap.Testing@anyemail.com
Address: 111
111, AK 11111
Phone: 111-111-1111 ext0
Driver License Number: Not Provided
Date Of Birth: 01-01-2001

If you continue to have problems please email GatewayAdminDEV@insurance.ohio.gov or contact us at 1-877-737-1057.

- Finished! You have now completed the process to add additional ODI Gateway application access to your account!
- Some applications may need additional set up. Refer to the application specific user guide for that information.
- **Contact:** If you need further assistance, please contact GatewayAdmin@insurance.ohio.gov