

2024

## Consumer Representative Application - (RDC) – Online Data Entry User Guide

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**2025 Consumer Rep Application (RDC) User Guide**

*As of September 2024*

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### Login:

To access the Automated Consumer Representative Application for 2025, use <https://rdc.naic.org>

The Login window displays.

Enter the NAIC Username and Password. Select the Login button.

Those wishing to enter applications to be considered for Consumer Representative selections should email the NAIC Help Desk (M-F 6:00 am – 8:00 pm) at [help@naic.org](mailto:help@naic.org) to request creation of an account and role in NETIQ. The Help Desk will also contact the Administrator to request assignment of a user ID giving the applicant access to the automated application online.

**NAIC** NATIONAL ASSOCIATION OF INSURANCE COMMISSIONERS

**Sign In**

Username

Please enter a username

Password

Remember me

**Sign In**

[Did you forget your Password? \(Use only if the OKTA password question is setup\)](#)

[Need assistance with logging in?](#)

[Email Support](#) [Call: \(855\) 674-6477](#)

[By logging in, you agree to the NAIC's Terms & Conditions](#)

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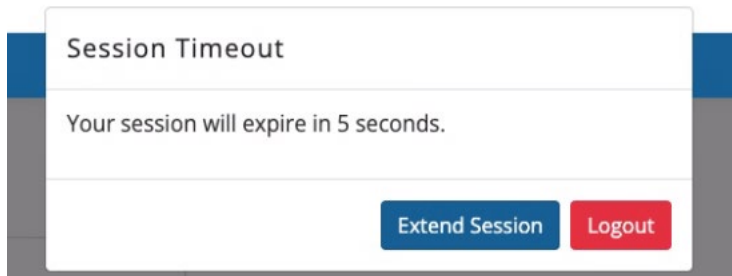
### General:

#### Timeout Warning

After inactivity, the system will log the user off after thirty minutes.

- To continue the session prior to log off, move the mouse or enter a keystroke.
- If timed out, you must log back on to the application.

*If you are idle for 25 minutes a session time out pop up will display. If you do not move the mouse or enter a keystroke, you will be logged out.*



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### Refresh application

The RDC logo on the menu bar will refresh the application (page) when clicked. Please do not use the browser back arrow while in the application. Using the browser back arrow will result in unknown and unstable results.



### No Roles Assigned Messaging

When a user signs into RDC but doesn't have a role assigned a message displays 'No roles assigned to user id.'

### User - RDC Home/Datacall Selection

The Datacall Selection window is where you select which datacall to work with. Select MKTREG; then CONSUMER\_REP\_APP\_2025.



## Datacall Selection

Select datacall group:

Select datacall:

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## Online Data Entry

When selecting a datacall, the user will be taken to a Dashboard. On the Dashboard, there will be a Welcome message that includes Steps for submitting a filing and a Matrix that has the Assigned datacall submission keys along with its filing status. If a user has multiple assignments, then all assignments will display.

## User Dashboard

The User Dashboard will display any and all Filings assigned to the user.

The Filing Status will initially be Not Started.

Click the assigned filing link and the user will be taken into the enterable form.

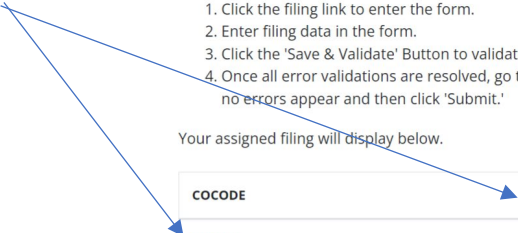


### Welcome to the TEST DATACALL

Follow these steps to submit a filing:

1. Click the filing link to enter the form.
2. Enter filing data in the form.
3. Click the 'Save & Validate' Button to validate your entered data.
4. Once all error validations are resolved, go to the Summary page and click a final 'Save & Validate' to confirm no errors appear and then click 'Submit.'

Your assigned filing will display below.



COCODE	Filing Status
111111	In Progress
110011	Not Started

The available Filing Statuses include 'Not Started', 'In Progress', 'Processing' and 'Submitted'.

The form and the data entered will be locked and unable to be changed until the file finishes 'Processing' and moves to the 'Submitted' status.

Since this datacall allows attachments, there will be another column that displays the Filing's submitted attachments. The attachments will be sorted alphabetically.

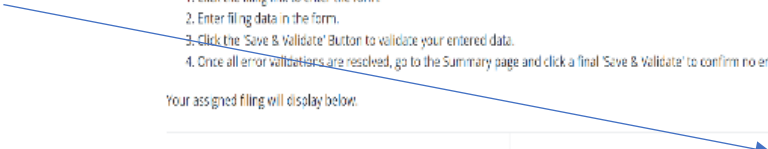


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Your assigned filing will display below.



ApplicantName	Filing Status	Attachments
rdctes	In Progress	

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## Filing Form

Once the user has selected the link, the Filing form displays.

The user will fill out the form and click the Next button to step through the form. As the questions are answered in order only corresponding related questions are displayed.

## Viewing data when larger than field

When you are in one of the text fields and have more data entered than you can see, you can grab the right corner of the field with your mouse and drag it downward in order to see your full answer.

2 Name

The Form Navigation is listed on the left under 'Page Navigation' header. If the user saves and returns later the values will be retained and they can go directly to the last question by using the Navigation. In addition to the scroll navigation bar on the left side of the screen, there are two scroll navigation bars (one on the inside and one on the outside) on the right side of the screen.

ODE\_SUBMIT\_DATA Data Entry Form - 11111

Actions

- Save
- Save and Validate
- Submit

Page Navigation

- > Main Section
- > Second section
- New Section
- Summary

Main Section

	Answer	Answer 2	Answer 3
1 Enter a string between 3 and 8 characters	<input type="text" value="sbdl"/>	<input type="text" value="Answer 2"/>	<input type="text" value="Answer 3"/>
2 Required string	<input type="text" value="apple"/>	<input type="text" value="Answer 2"/>	<input type="text" value="Answer 3"/>
3 A word for house	<input type="text" value="casa"/>	<input type="text" value="Answer 2"/>	<input type="text" value="Answer 3"/>
4 Integer min and max	<input type="text" value="3"/>	<input type="text" value="Answer 2"/>	<input type="text" value="Answer 3"/>
5 String can't contain special characters	<input type="text" value="Answer"/>	<input type="text" value="string"/>	<input type="text" value="Answer 3"/>
6 Must be a decimal	<input type="text" value="Answer"/>	<input type="text" value="25,7"/>	<input type="text" value="Answer 3"/>
7 Disabled question	<input type="text" value="Answer"/>	<input type="text" value="Answer 2"/>	<input type="text" value="Answer 3"/>

Next Summary

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Once the user has entered all of the required data into the form, click on the Summary Page and it will display. The Summary will show all the questions that have been answered. Before submission is permitted, the user must click Summary then do a Save and Validate which will display any errors/warnings for the Filing form. Errors typically indicate one or more required questions have been missed and need to be answered before the application may be submitted.

The following Action buttons are above the Page Navigation:

- Save – will save any data entered in the form but will not submit the data.
- Save and Validate – will save and compare the entered data to ensure it passes as clean data.
  - The warning or error messages will display the entire list at the top for review and will also display under each question/field that has a corresponding error.

If you have errors, you can correct them and then click “Save and Validate” again.

You cannot submit your application until you correct the errors.

You can still submit your application if you see a warning message, but it is best to ensure warnings are addressed prior to submission.

### Upload Attachment

Attachments are required for this application, so there is an Action option button for Upload Attachments.

The screenshot displays the RDC application interface. At the top, there is a navigation bar with the NAIC logo and the text 'NATIONAL ASSOCIATION OF INSURANCE COMMISSIONERS'. Below this is a secondary navigation bar with 'RDC Home', 'User Assignments', and 'Dashboard'. The main content area is titled 'Welcome to the TEST DATACALL'. On the left side, there is a sidebar with two sections: 'Actions' and 'Page Navigation'. The 'Actions' section contains four buttons: 'Save', 'Save and Validate', 'Submit', and 'Upload Attachment'. A blue arrow points to the 'Upload Attachment' button. The 'Page Navigation' section lists six sections: 'Section 1: Applicant Information', 'Section 2: Demonstrated Expertise and Experience', 'Section 3: Meeting Participation', 'Section 4: NAIC Participation', 'Section 5: Conflict of Interest', and 'Section 6: Diversity'. The main content area shows a 'Summary' page with a blue warning message: 'Please press 'Save and Validate' prior to submitting your filing.' Below this is a green success message: 'Section 1: Applicant Information Form Saved Successfully'. The 'Section 1: Applicant Information' section is expanded, showing a list of questions and their responses. The questions are: 1. 'I am currently an NAIC Consumer Representative' (Response: No), 2. 'Name' (Response: dsdafa), 3. 'Mailing Address' (Response: Responses), 4. 'Email Address' (Response: Responses), and 5. 'Telephone Number' (Response: Responses). There are 'Previous' and 'Download' buttons in the top right of the summary area.



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When the Upload Attachments button is selected a pop up will display. Select the 'Click to browse' link or drag and drop your file to the provided box, then select 'Upload'.

Upload Attachment

Select the Click to browse link or drag and drop the file to this upload area and click Upload. File types allowed include PDF, Docx, Xlsx, JPEG and PNG. The file size limit is 10MB.

Click to browse or drag & drop to upload your file

Upload Cancel

When the attachment is uploaded a success message displays at the top of the pop-up window.

Upload Attachment

NAIC Employee Guide-updated.pdf is ready for upload

Select the Click to browse link or drag and drop the file to this upload area and click Upload. File types allowed include PDF, Docx, Xlsx, JPEG and PNG. The file size limit is 10MB.

Click to browse or drag & drop to upload your file

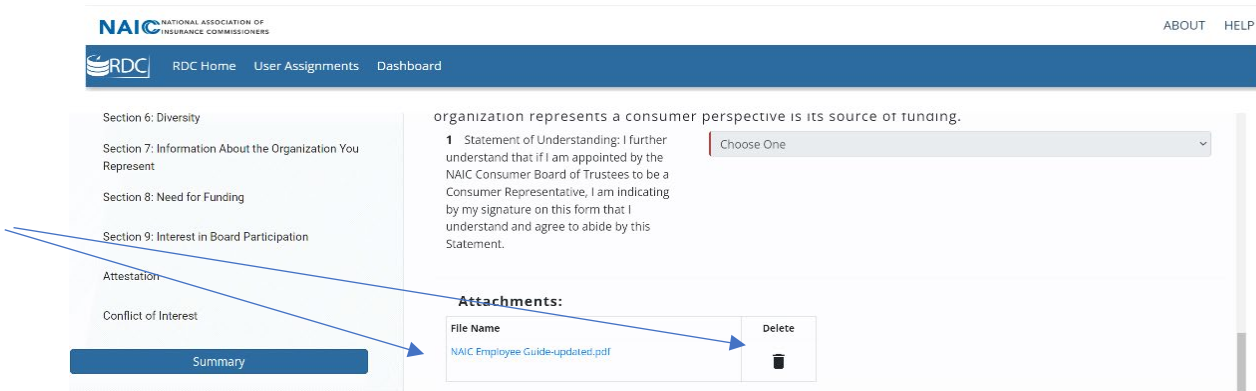
Upload Cancel

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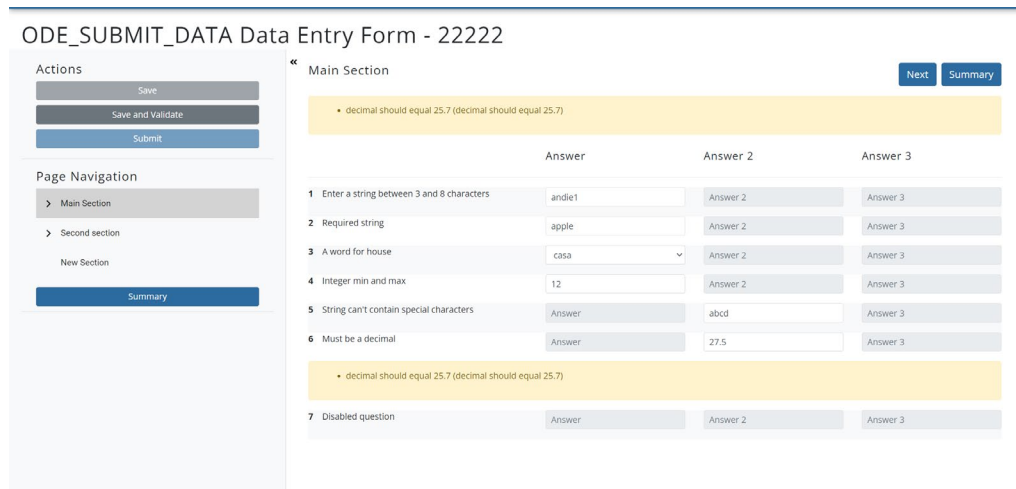
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After the attachments are successful, the list of attachments are at the bottom of the Summary page.

The attachments are sorted by time loaded with the first loaded at the top of the list. There is a delete option available if needed.

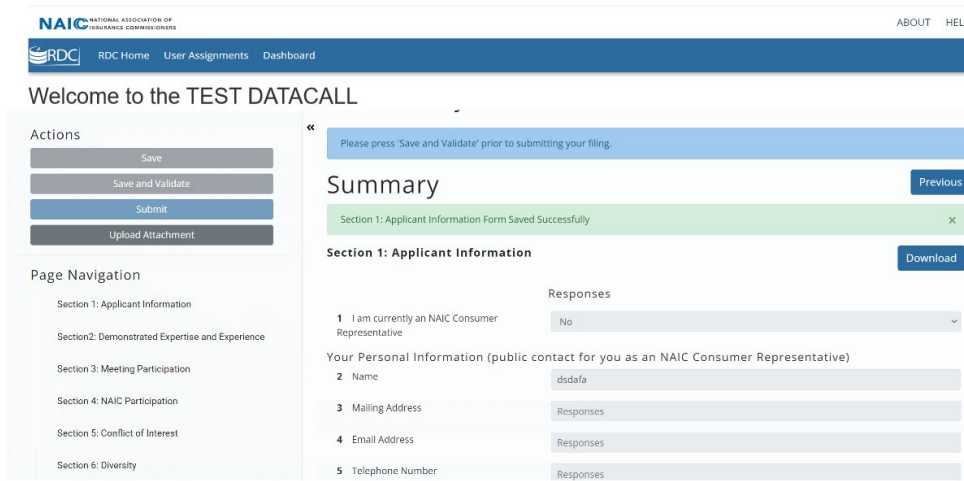


Submit –Once you click the Submit button, you can no longer edit the application. The Submit button will only be active after you’ve clicked Save and Validate and have no errors.



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## Download Summary of Filing

On the Summary page there is also a Download button so the user can download, save, and print a copy of the Filing for their records.

