

2024

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

Adkins, Chelle/Lois Alexander

10/9/2024



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

*As of October 9, 2024*

**Contents**

- Login: .....3
- General: .....4
  - Timeout Warning .....4
  - Refresh application .....5
  - No Roles Assigned Messaging.....5
  - User - RDC Home/Datacall Selection .....5
- Online Data Entry .....6
  - User Dashboard .....6
  - Filing Form.....7
  - Viewing data when larger than field.....7
  - Upload Attachment.....8
  - Download Summary of Filing.....11

## 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

To enter an automated application to be considered for Consumer Representative selection, email the NAIC Help Desk (M-F 6:00 am – 8:00 pm Central Time) at [help@naic.org](mailto:help@naic.org) to request creation of an account and role in NETIQ. Sample email to the NAIC Help Desk at [help@naic.org](mailto:help@naic.org) to obtain access to the 2025 Automated Consumer Representative Application:

To: [Help@naic.org](mailto:Help@naic.org)

I am seeking to fill out the (newly online) application for a term as a Consumer Representative. Per Lois Alexander, this requires me to have an “LDAP ID and role.” This is done by me sending this email and providing to you the following information:

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: XXX-XX-XXXX

Please let me know if you need any further information.

Thanks.

The Help Desk will send the LDAP ID and NETIQ role to the Administrator (Lois Alexander) for assignment of a user ID to you. Lois will notify you when it is available for you to use.

### Login:

To access the Automated Consumer Representative Application for 2025, use Google Chrome (do not use Firefox or Mozilla): <https://rdc.naic.org>

The Login window displays.

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

**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](#)

© National Association of Insurance Commissioners 2023

## 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

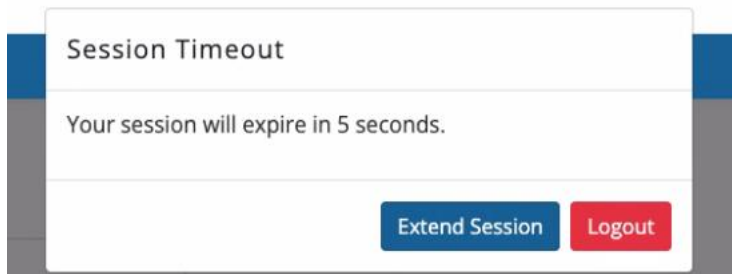
### General:

#### Timeout Warning

After inactivity, the system will log the user off after thirty minutes so be sure to Save often as you enter your responses.

- 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.*



## 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

### 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.' Please contact Lois Alexander at [lalexander@naic.org](mailto:lalexander@naic.org) for assistance.

### 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 from the drop-down arrows.



## Datacall Selection

Select datacall group:

Select datacall:

# 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

## Online Data Entry

After 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.

## User Dashboard

The User Dashboard will display any 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 requires attachments, there will be another column that displays the Filing's submitted attachments. Documents can only be uploaded on the summary page, not the attestation page where it asks for a list of file names. The attachments will be sorted alphabetically.



### 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.

ApplicantName	Filing Status	Attachments
rdctes	In Progress	

# 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

## 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 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

## 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

Once the user has entered all 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 click Save and Validate which will display any errors/warnings in the Filing. 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 to Upload Attachments.

The screenshot displays the RDC application interface. At the top, the NAIC logo and navigation links (RDC Home, User Assignments, Dashboard) are visible. A blue banner reads "Welcome to the TEST DATACALL". On the left, the "Actions" menu includes buttons for "Save", "Save and Validate", "Submit", and "Upload Attachment", with a blue arrow pointing to the "Upload Attachment" button. Below this is the "Page Navigation" section listing sections 1 through 6. The main content area shows a "Summary" page for "Section 1: Applicant Information". A blue message box at the top of the summary page states: "Please press 'Save and Validate' prior to submitting your filing." Below this, a green success message reads: "Section 1: Applicant Information Form Saved Successfully". The "Section 1: Applicant Information" section includes a "Download" button and a "Responses" dropdown menu. The form fields are numbered 1 through 5:

Number	Field Name	Response
1	I am currently an NAIC Consumer Representative	No
2	Name	dsdafa
3	Mailing Address	Responses
4	Email Address	Responses
5	Telephone Number	Responses



## 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024

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

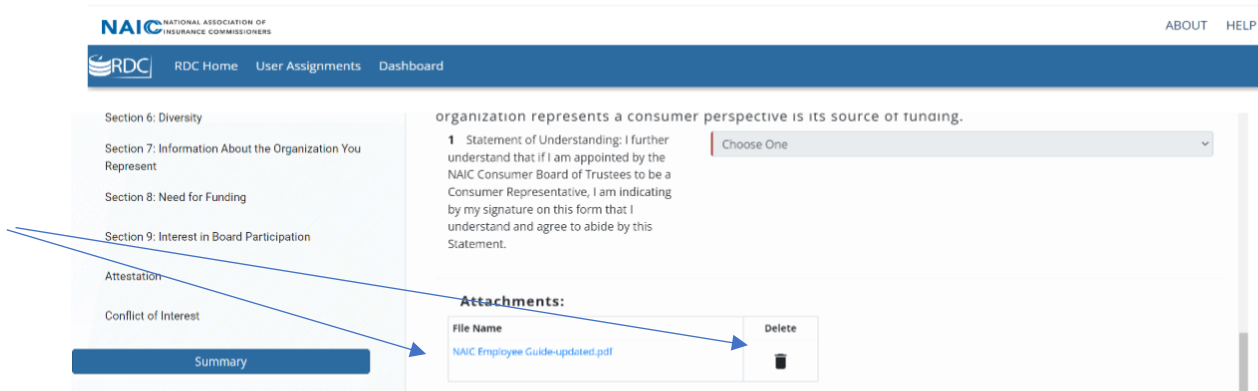
Upload Cancel

## 2025 Consumer Rep Application (RDC) User Guide

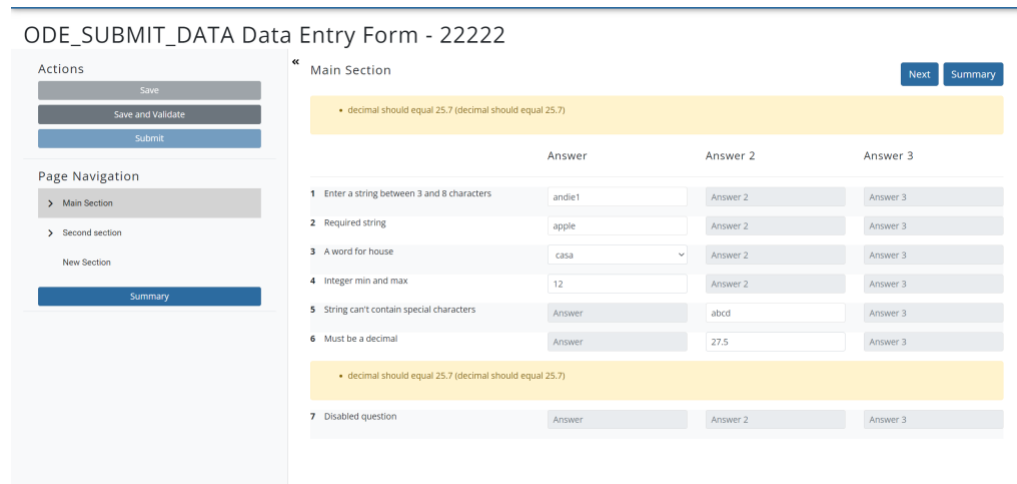
As of October 9, 2024

After the attachments are successful, the list of attachments is shown 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.

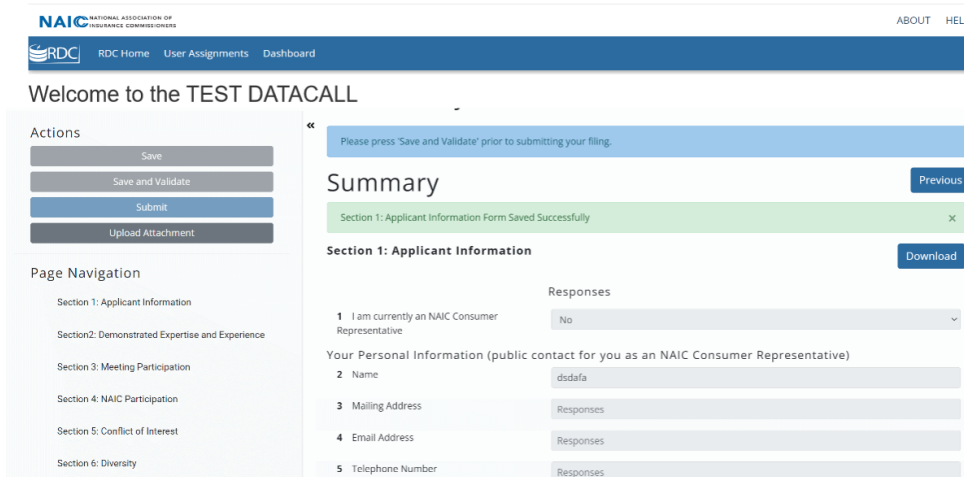


Submit –Once you click the Submit button, you can no longer edit the application. The Submit button will only be active after you've clicked Save and Validate and have no errors. The "Submit" button is only accessible after hitting "Save and Validate". The submission is not acknowledged when the Submit button is used but goes back to the first page of the saved application. If you log out of RDC and log back in, the In Progress note will change to Submitted. Future iterations of the application may be changed to indicate successful submission without the user having to log out and log back in to confirm submission.



# 2025 Consumer Rep Application (RDC) User Guide

As of October 9, 2024



## 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.

Currently, the downloaded summary PDF of a submitted application only shows the first line of text in the drop-down text boxes.

Everything entered into the text boxes can be seen in RDC. We are aware that the text boxes do not expand when downloaded as PDFs. A fix is being worked on this so the downloaded document will include expanded text boxes that can be downloaded as a PDF going forward.

