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# INSURANCE & RETIREMENT SERVICE

## I&RS SUPER ACCESS COORDINATOR GUIDE

OCTOBER 2018

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# COMPLETING YOUR REGISTRATION AND ACCESS TO CRS

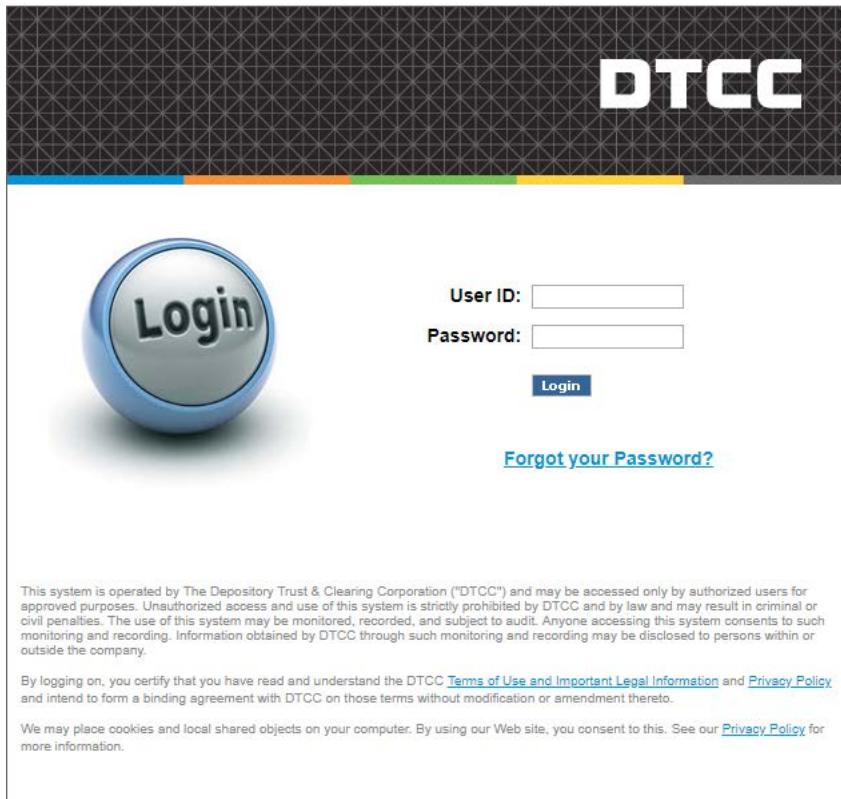
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In your role as a Super Access Coordinator (Super AC) for your firm, you are responsible for provisioning members of your firm with operator access to DTCC's various systems and applications and maintaining and monitoring their credentials to do so. You can also create Access Coordinators with the ability to also provision firm members with operator access.

Your firm is required to have at least two Super ACs at all times. The creation of additional Super ACs for your firm requires the dual authorization of you and your firm's other Super AC. While you are able to provision yourself with operator access, changes to your Super AC entitlements must be authorized by another Super AC at your firm.

Super Access Coordinators are granted access to the DTCC Portal via a Web login ID for the purpose of provisioning Operators with access to I&RS products. Super AC's receive their login credentials via automated emails that are sent from the DTCC Customer Registration System (CRS) – 1 email contains the login ID and 1 email contains the temporary password.

1. Login to DTCC Portal <https://portal.dtcc.com>.



**DTCC**

**Login**

User ID:

Password:

**Login**

[Forgot your Password?](#)

This system is operated by The Depository Trust & Clearing Corporation ("DTCC") and may be accessed only by authorized users for approved purposes. Unauthorized access and use of this system is strictly prohibited by DTCC and by law and may result in criminal or civil penalties. The use of this system may be monitored, recorded, and subject to audit. Anyone accessing this system consents to such monitoring and recording. Information obtained by DTCC through such monitoring and recording may be disclosed to persons within or outside the company.

By logging on, you certify that you have read and understand the DTCC [Terms of Use and Important Legal Information](#) and [Privacy Policy](#) and intend to form a binding agreement with DTCC on those terms without modification or amendment thereto.

We may place cookies and local shared objects on your computer. By using our Web site, you consent to this. See our [Privacy Policy](#) for more information.

Figure 1 DTCC Portal

2. **Conditional.** Upon first login, a Super AC is only given access to a single product – CRS. If logging in for the first time or using a new computer, you may need to register your computer. Follow instructions found in the DTCC Portal Login instructions email to register your computer.
3. Select **Customer Registration System CRS**.
4. As a first-time user of CRS, you must acknowledge your responsibilities as an Access Coordinator. Click **Agree**.

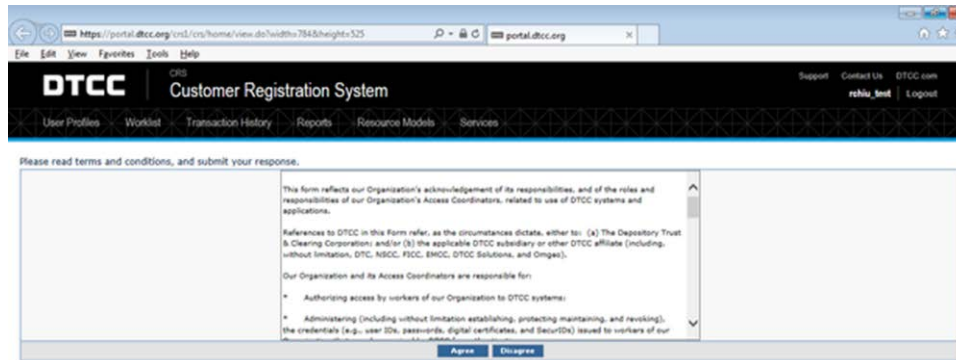


Figure 2 AC Acknowledgement

You are then taken to the CRS home page where you can provision users with access to Insurance products.

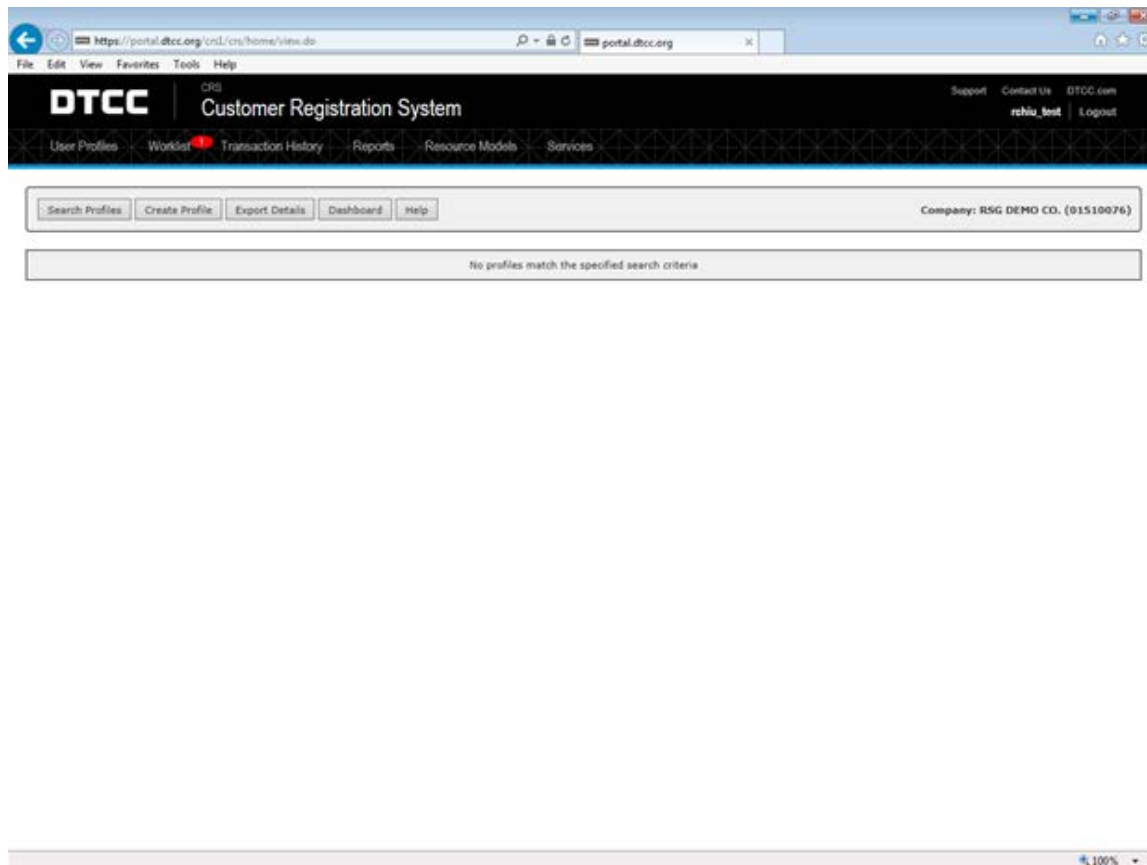


Figure 3 CRS Home Page

# CREATING A USER PROFILE

Each user must have a profile. Profiles are unique by company and email address. That is, you cannot create more than one profile for the same company and email address.

Each profile must have at least one login ID. The login ID lets the user login and use the products he or she is registered for. The login ID can be a web, mainframe, or global login ID. Insurance products require a web login ID.

1. From the home page, click **Create Profile**. You will be prompted to enter user profile information.

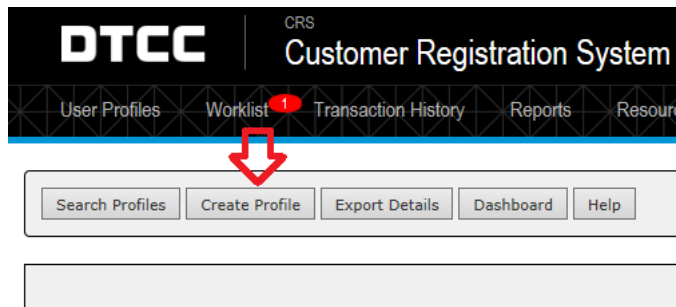


Figure 4 Create Profile

2. Complete all the required fields and click **Next**.

Figure 5 Create Profile dialog box

## Note:

If a profile already exists for the email address you entered, the following warning message will be displayed: "A matching profile already exists in CRS." You will not be allowed to create another profile with the same email address. You must either change the email address or click Cancel and search for the existing user profile.

3. Follow the instructions under [Provisioning Yourself as an Operator \(Optional\)](#) to use the Search Profile button to find the existing user profile.

## Add a Login ID

4. Select one of the options in the **Login ID** field:
  - a. Web
  - b. Mainframe, or
  - c. Global

### Note

If you are uncertain which type of login ID to select, click the **List Products** buttons. The products for that type of login ID will be displayed. If necessary, you can always add another login ID to the profile. (As SAC, you need a Web login ID.)

**Create Profile** [X]

*This will create a new login ID.*

**Profile**

**Name:** I RS SAC Demo  
**Email:** sacdemo@dtcc.com  
**Telephone:** 2128551000  
**Company:** RSG DEMO CO. (01510076)

**Login ID**

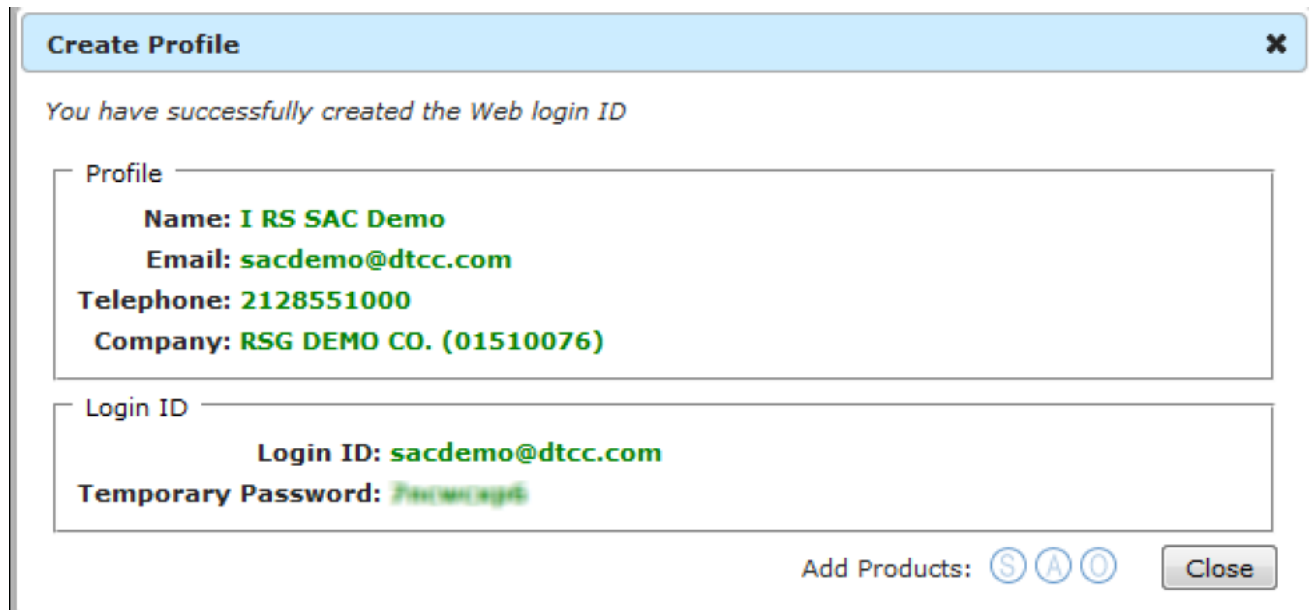
<input checked="" type="radio"/> Web	List Products
<input type="radio"/> Mainframe	List Products
<input type="radio"/> Global	List Products

**Login ID:** sacdemo@dtcc.com

Cancel < Back Create

Figure 6 Login ID

5. Click **Create**. A summary of the user profile and login ID you created will be displayed.



The image shows a 'Create Profile' window with a light blue header bar containing the title 'Create Profile' and a close button (X). Below the header, a message states: 'You have successfully created the Web login ID'. The window is divided into two main sections: 'Profile' and 'Login ID'. The 'Profile' section contains the following information: Name: I RS SAC Demo, Email: sacdemo@dtcc.com, Telephone: 2128551000, and Company: RSG DEMO CO. (01510076). The 'Login ID' section contains: Login ID: sacdemo@dtcc.com and Temporary Password: 7mwwag46. At the bottom right of the window, there is a link 'Add Products:' followed by three circular icons labeled S, A, and O, and a 'Close' button.

**Create Profile** X

You have successfully created the Web login ID

Profile

**Name:** I RS SAC Demo  
**Email:** sacdemo@dtcc.com  
**Telephone:** 2128551000  
**Company:** RSG DEMO CO. (01510076)

Login ID

**Login ID:** sacdemo@dtcc.com  
**Temporary Password:** 7mwwag46

Add Products: S A O **Close**

Figure 7 Create Profile summary page

- Optional. Click "O" on the Create Profile summary page to add products, or Click **Close** to return to the CRS home page to add products to the profile from there.

Now that you have created a new Web Login ID, CRS emails the new login ID and temporary password to the user in two separate emails, along with instructions on how to complete their registration.

# PROVISIONING A USER TO ACCESS INSURANCE PRODUCTS

1. Select “O” to add products to the Login ID, as an Operator.

DTCC CRS Customer Registration System

User Profiles Worklist **1** Transaction History Reports Resource Models Services

Search Profiles Create Profile Export Details Dashboard Help

☒ 0 IDs Selected ▼

One profile found. **1**

EMAIL: **sacdemo@dtcc.com** NAME: **IRS SAC Demo** TEL: **0000000000**

☐ ☐ ☐ ☐ ☒ ☐ ID: **sacdemo@dtcc.com** LAST LOGIN: -

**Add/Modify Entitlements**

**Operator:** There are no products currently authorized.

One profile found. **1**

Figure 8 CRS Home Page

2. Click **Add/Modify Products**. The Add/Modify Products for ID page appears.



- Under Wealth Management Services, select the insurance products for which you want to grant access to the user. Some products allow you to select a specific role, while others may be preset.

Add/Modify Entitlements for ID "sacdemo@dtcc.com"

**Wealth Management Services**

☒ **Insurance Attachments Access**

Roles:  Accounts:

☒ **Insurance Attachments B2B**

Roles:  Accounts:

☒ **Insurance Producer Management Web**

Roles:  Accounts:

Roles:

Login Id:   [Legend](#)

Figure 9 Add/Modify Products for ID page

- Click the down arrow next to **Roles** in the product field.
- Select each desired role.
- Click **Submit** to confirm your choices. The newly added products and roles can now be seen under **Roles**.
- Click **Confirm** at the bottom of the screen to commit the changes.

Add/Modify Entitlements for ID "sacdemo@dtcc.com"

**Insurance Attachments Access**

Roles: Enter attachment data and upload attachments Accounts: 00009093 (NSCPRT)

**Insurance Attachments B2B**

Roles: IAT WEBSERVICE Accounts: 00009093 (NSCPRT)

**Insurance Producer Management Web**

Roles: Carrier Accounts: 00009093 (NSCPRT)

Legend Cancel Back Submit

Figure 10 Add/Modify Products for ID page with roles

- Click **Submit** to complete the process. The user should now see a link to these products when they log in using their Web Login ID.

## B2B Products

If you granted the user access to a B2B product, the user will need to download a digital certificate and enter the activation code that the system generates.

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**Note:**

As a SAC, you will need to email the activation code to the user.

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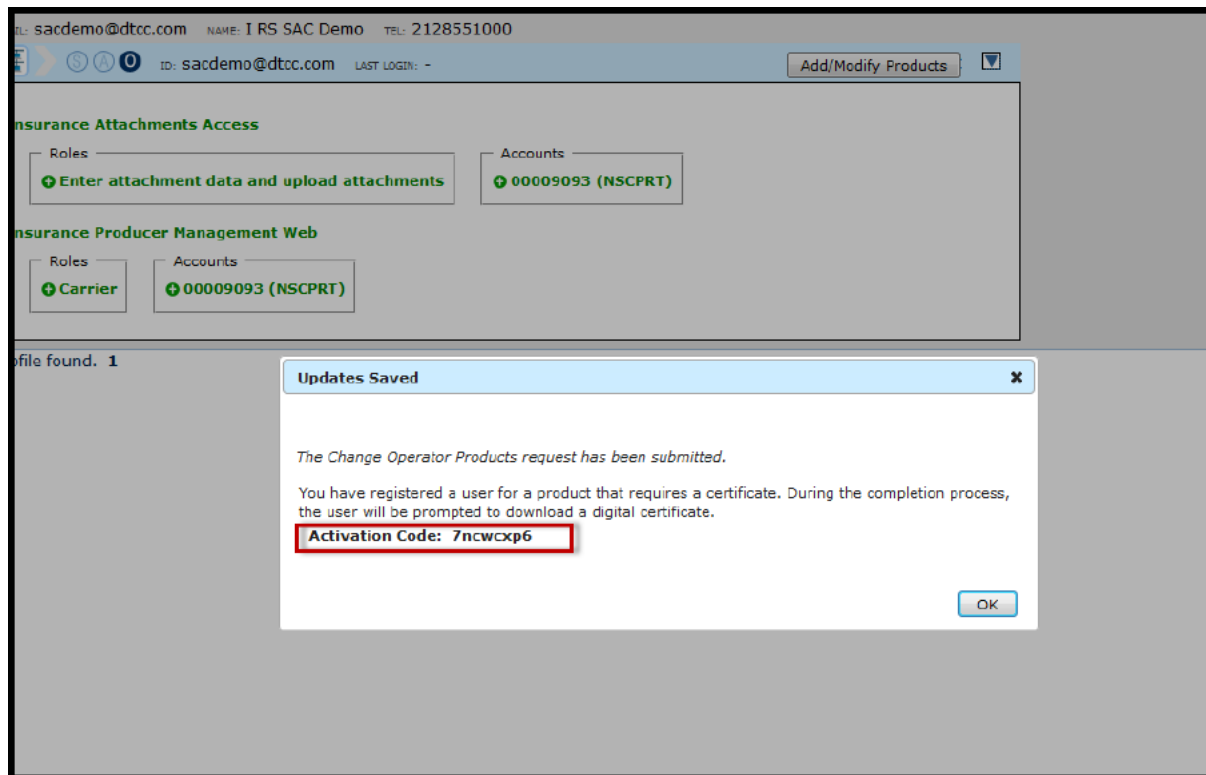


Figure 11 B2B Activation Code

# PROVISIONING YOURSELF AS AN OPERATOR (OPTIONAL)

1. From the CRS Homepage, click the **Search Profiles** button.
2. The Search Profiles pop-up appears. You may search by User Info, AC Type, or Operator Product. Type in your information and click **Search**.

The screenshot shows the DTCC Customer Registration System interface. At the top, there's a navigation bar with 'DTCC' logo, 'CRS Customer Registration System', and links for 'Support', 'Contact Us', 'DTCC.com', 'rchiu\_test', and 'Logout'. Below this is a menu bar with 'User Profiles', 'Worklist', 'Transaction History', 'Reports', 'Resource Models', and 'Services'. A red '1' is next to 'Transaction History'. Below the menu bar is a toolbar with 'Search Profiles', 'Create Profile', 'Export Details', 'Dashboard', and 'Help'. The main content area shows a message 'No profiles match the specified search criteria'. A 'Search Profiles' pop-up is open, displaying search criteria for 'Company: RSG DEMO CO. (01510076)'. The pop-up has three sections: 'Search by User Info' with fields for 'First Name', 'Last Name', 'Email', and 'Login Id'; 'Search by AC Type'; and 'Search by Operator Product'. At the bottom of the pop-up, there's an 'Include:' section with checkboxes for various options, including 'IDs Without Products' and 'In-flight Results', and 'Cancel' and 'Search' buttons.

Figure 12 Search Profiles

## Note:

Your profile should now be displayed. If the product you are adding requires only a Web login ID, you do not need to add a new login ID.

3. Select "O" if the product requires your existing Web login ID.
4. Click **Add/Modify Products**.
5. Follow the instructions in [Provisioning a User to Access Insurance Products](#).

# CONTACT INFORMATION

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If you need further assistance for business related topics, contact your Relationship Manager (RM) or send an email to [entitlements@dtcc.com](mailto:entitlements@dtcc.com).

## FOR MORE INFORMATION

Email DTCC Learning at:

[CoreLearning@dtcc.com](mailto:CoreLearning@dtcc.com)

or visit us on the web at:

[www.dtccllearning.com](http://www.dtccllearning.com)