



Creating an ODI Gateway Account: A How-to Guide

Purpose: Step-by-step instructions on how to create a new ODI Gateway account.

Note: This process applies to accounts for applications that use the ODI Gateway. Gateway location: <https://gateway.insurance.ohio.gov>

Note: *ODI takes our responsibility to safeguard user data seriously. As such, ODI reserves the right to verify information submitted and, if the account is for business purposes, verify that the requestor is authorized to perform the functions inherent to the application access being requested. This is true for initial account requests and/or upgrade requests.*

Step 1: Open a browser and navigate to the Gateway location. The screen should look like Figure 1 below.

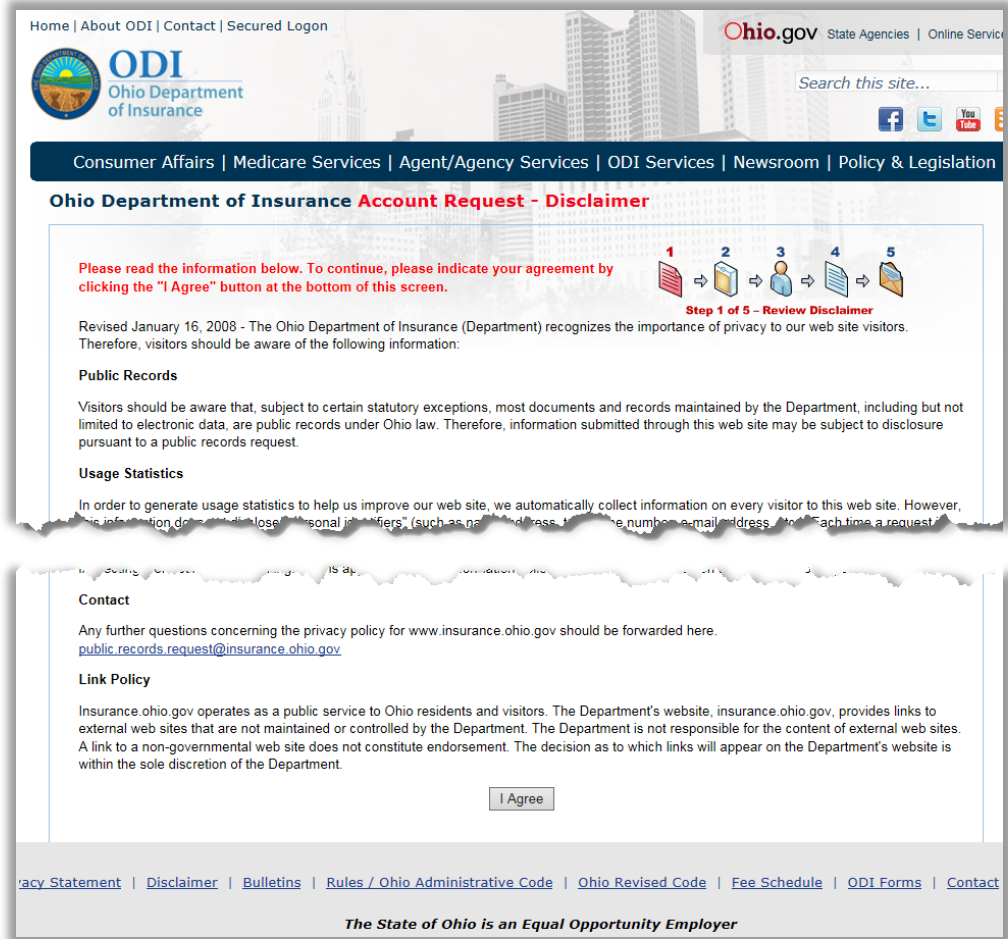
Step 2: Using your mouse, click on the button to create an account; located in Figure 1 by the red outline.

Notes: The red outlines will not appear on your screen. Also, the account information shown is not for a valid Gateway account. You must enter information specific to your situation when requesting an account.

Figure 1:

Step 3: The screen on the next page (Figure 2) explains some of the measures ODI takes to safeguard data and how we may use that data. Figure 2 is only a partial image of this screen. *You must agree to the information on this screen or you will not be able to proceed.* Click the “I Agree” button at the bottom to continue.

Figure 2:



Step 4: On the following page, you will be asked to select the application to which you are requesting access. (If you already have a Gateway account, you are in the wrong place. Please read the document on requesting additional application access.) Figure 3 shows the list of applications with one already selected. Keep in mind the list of available applications can change over time.

Figure 3:

Consumer Affairs | Medicare Services | Agent/Agency Services | ODI Services | Newsroom | Policy & Legislation

Ohio Department of Insurance New ODI Account – Request Access

Please select the area you would like to access. Depending on the area you choose, you may be asked to enter some personal information for identity purposes. You will also be asked to verify your email address using an automatically generated email with a link back to the Department's website. Once the verification process is complete you will be able to login and access certain applications. 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.

1 2 3 4 5
Step 2 of 5 - Request Access

BUSINESS AREA AND/OR APPLICATION SELECTION	
<input type="radio"/> Agent Health Insurance Exchange Registration	This application is currently limited to Ohio licensed insurance agents who wish to have their Federal Health Insurance Exchange Registration noted on their Ohio insurance record. Access is not available to any individual who does not have an active Ohio insurance license and a National Producer Number (NPN).
<input type="radio"/> Annual Title Agent/Agency Review	Online submission of the Annual Title Review form for licensed Title Agents & Agencies.
<input type="radio"/> Captive Insurance - File Upload	Used for Captive Insurance companies to upload files.
<input type="radio"/> Education Provider Portal	This application is limited to Continuing Education Providers. Access is denied if you are not affiliated with an Ohio approved Continuing Education Provider.
<input type="radio"/> Fiscal Epay	The application used to pay invoices sent by the Ohio Department of Insurance.
<input type="radio"/> Licensing CE	This application is strictly limited to Prometric.
<input type="radio"/> Missing Life Policy Search	The Ohio Department of Insurance's missing life insurance policy search service assists Ohio residents, and the families of deceased Ohio residents, in locating lost insurance policies that were purchased in the state. This application is to be used by insurance companies selling business in Ohio to aid in the search and discovery of these lost insurance policies.
<input checked="" type="radio"/> 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="radio"/> OSHIIP	The Ohio Senior Health Insurance Information Program (OSHIIP) provides free health insurance information and services to Medicare beneficiaries and the people that care for them. OSHIIP offers a toll-free hotline, 1-800-696-1578, free publications, a speakers bureau and training for volunteers.
<input type="radio"/> QA Business Area Test	QA Business Area Test
<input type="radio"/> RiskExam	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.

1. Select the application to which you need access.

2. Click the Continue button.

Step 5:

The next screen (Figure 4) explains that you must only create an account for yourself to use and the rules that govern your use of this account. It also states that ODI may terminate an account without notice should these rules not be followed. ODI takes very seriously our commitment to securing the data you provide to us as well as the information we may collect from citizens of Ohio. Adhering to these rules is one way we maintain security. If you have any questions about the rules in Figure 4, please contact ODI. Click the checkbox affirming that you agree to follow these rules.

Figure 4:

Consumer Affairs | Medicare Services | Agent/Agency Services | ODI Services | Newsroom | Policy & Legislation

Ohio Department of Insurance New ODI Account – Personal Information

In order to protect your security and ensure the interests of the citizens of Ohio are safeguarded, there are some basic rules that ODI requires to be followed when an account is requested:

- When filling out the request form, you agree that the account you are requesting is for your use only and you will not share your account information. (Each person needing access to our systems must request their own account.)
- The name you enter must be your own name.
- The email address you enter needs to be for an email account that only you use, and this email account is not shared and is not a generic account.
- ODI routinely requires a password change to protect our systems and your account. If you are suddenly not able to log in, please change your password. A link is on the log in page.

By clicking the checkbox below you agree that you are abiding by the conditions set forth above, and that you acknowledge that if ODI determines you have not created your account as set forth above, ODI may, without notice, terminate that account and remove all access to its systems for that account.

I Agree

Step 6:

Please enter all required fields on the Personal Information screen (Figure 5). Access to some applications may require more detailed information than access to other applications. At the bottom, enter the

letters and/or numbers to verify you are human, then click the Continue button.

Figure 5:

Please fill out the form below. We need this information to confirm your identity and create your account.

Step 3 of 5 - Provide Personal Information

** indicates a required field*

Personal & Identification Information

*First Name: John Middle Name: Last Name: Doe

*Date Of Birth: 05/17/1978

*Security Question 1: In what city or town was your first job? Answer: Anytown Re-enter Answer: Anytown

*Security Question 2: In what city or town were you born in? Answer: Mycity Re-enter Answer: Mycity

*Security Question 3: What is the name of the first school you attended? Answer: Myschool Re-enter Answer: Myschool

Organizational Affiliation
Simply start typing the name of your organization. After a list of organization names appears, please select one. Please note, if your organization is not in the list, simply leave this and the affiliation type fields blank.

Organization Name: Affiliation Type: -- None --

Contact Information

*Email: john.doe@testing.com *Confirm Email: john.doe@testing.com

*Phone Type: Business Location *Phone Number: 555-555-5555 Extension:

*Address Type: Business Location *Address: 50 W Town St

*City: Columbus *State: OH County: -- None -- *Postal Code: 43214

Additional Information

Submit Request
In order to submit this request, enter the letters you see in the image into the textbox below it, then click "Continue".
If the letters are unclear, click the image to generate a new set of letters.

9TFRX
Click here to change the image.

Continue

Step 7:

The screen will now display a confirmation message (Figure 6) and you will receive an email at the email address you entered (Figure 7). If the application you requested access to requires review by an ODI employee, you will not receive the confirmation email immediately. If you do not receive the confirmation email within 48 hours, please check your spam filter and (if a business) ask your IT department if the email could have been stopped before it was delivered to you. If you still can't find the email, please contact ODI using the contact information at the top of this document, citing the confirmation number.

Figure 6:

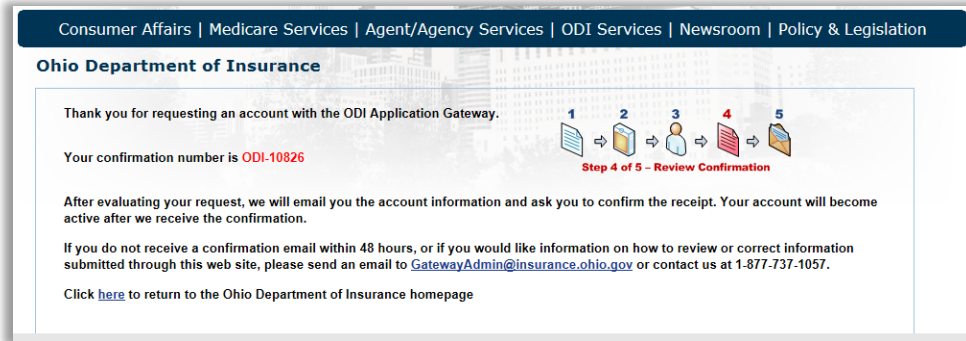
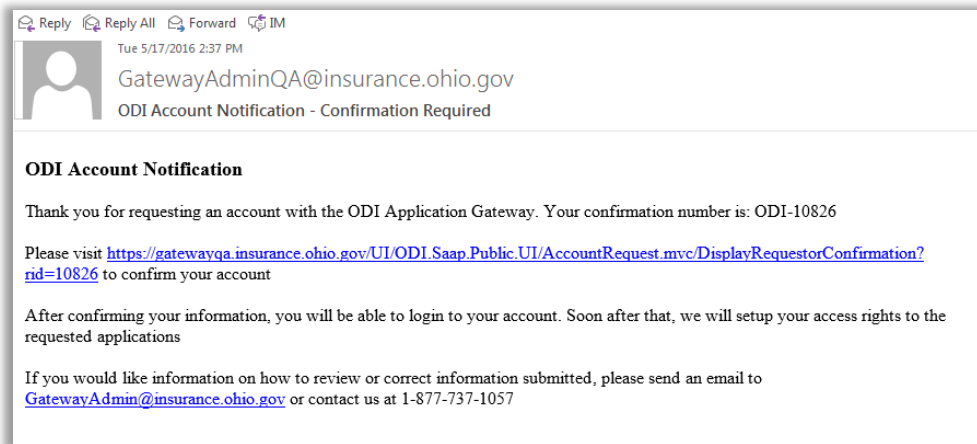


Figure 7:



Step 8: Please click the link in the confirmation email. You will now create your password. Follow the steps in the next three images (Figures 8, 9 and 10).

Figure 8:

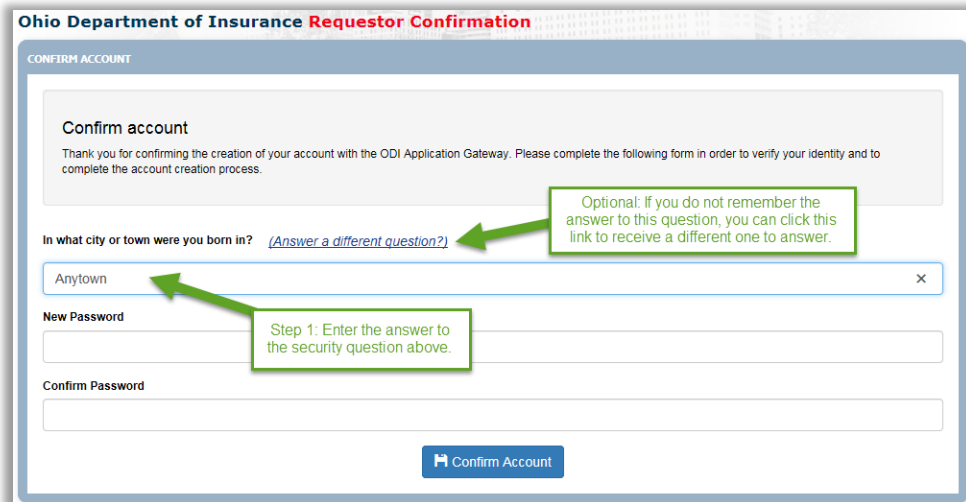


Figure 9:

The screenshot shows the 'CONFIRM ACCOUNT' page with the following elements:

- Confirm account** header and introductory text.
- Password requirements** list:
 - ✗ At least eight characters in length
 - ✓ Contains at least one lowercase letter
 - ✓ Contains at least one uppercase letter
 - ✗ Contains at least one number
 - ✓ Contains at least one special character (\$, %, ^, +, =, (,), !)
- In what city or town were you born in?** field with 'Anytown' entered.
- New Password** field with masked characters '....'.
- Confirm Password** field.
- Confirm Account** button.

Annotations include:

- A box pointing to the password requirements: "This is the list of password requirements. Each must be met to conform to ODI password standards. The individual criteria indicators will change as they become met. Criteria with a ✗ have not been met and will change to a ✓ when it has been met."
- A box pointing to the New Password field: "Step 2. Type your password. You will need to enter it twice."

Figure 10:

The screenshot shows the 'CONFIRM ACCOUNT' page with the following elements:

- Confirm account** header and introductory text.
- In what city or town were you born in?** field with 'Anytown' and a link: "(Answer a different question?)".
- New Password** field with masked characters '.....'.
- Confirm Password** field with masked characters '.....'.
- Confirm Account** button.

Annotations include:

- A box pointing to the Confirm Password field: "Step 3: Retype your password."
- A box pointing to the password mismatch error: "When typing your password for the second time, it must exactly match what you typed the first time. You'll know that they match when the ✗ changes to a ✓."
- A box pointing to the Confirm Account button: "Step 4: Click the Confirm Account button"

Finished! You have now successfully created your Gateway account. Your username is displayed on the screen (Figure 11), and your password is what you entered in the previous step.

Figure 11:

The screenshot shows the 'Ohio Department of Insurance Account Confirmed' page with the following text:

Thank you.

We have confirmed your account for accessing the Ohio Department of Insurance Application Gateway.

Your user name is **John.Doe@odi**. Please store this information in a safe place.

Please click [here](#) to log in.

Contact: If you need further assistance, please contact GatewayAdmin@insurance.ohio.gov