Verisk

ISO ClaimSearch®

USER ADMINISTATION GUIDE FOR NICB MEMBERS ONLY

March 12, 2019

Contents

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ISO ClaimSearch® User Admin Guide for NICB Members Only

1. NICB USER ADMINISTRATION

Welcome to ISO ClaimSearch® NICB User Administration!

This guide is intended for use by NICB Members who *are not ISO ClaimSearch subscribing members*.

Basic Facts About User Administration

1. As your company Administrator, you'll be able to give your associates the access they need and the tools they will use to process and investigate claims.
2. As an Administrator, you will be able to:
    a. Create new Users and Access Groups.
    b. Edit Users and Access Groups.
    c. Assign permissions to your ISO ClaimSearch products.
    d. Re-Activate or De-Activate Users.

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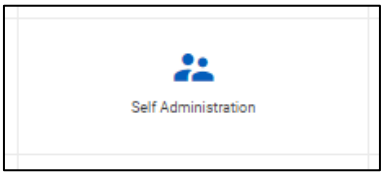
2. LOGGING IN

1. Go to https://claimsearch.iso.com.
2. Enter your **ISO ClaimSearch User ID** and **Password.**
3. Under **My Products** on the homepage you will see the **Self-Administration** tile. Click on it.



4. This will bring you into a new window where you can choose to go to the **Users** screen or the **Access Groups** screen.

    Users are the people in your company who need to access ISO ClaimSearch.

    Access Groups are easy way to bucket your Users who need the same type of permissions.

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3. ACCESS GROUPS

Access Groups are designed to ease the administrative burden around access. Many employees have similar roles, and you can use this similarity to create specific sets of permissions that can be applied to one or more users, rather than creating a new set of permissions for each user.

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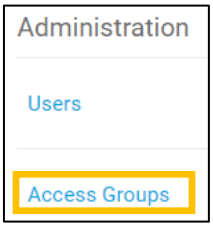
Basic Facts About Access Groups

1. Access Groups cannot be deleted but they can be re-named and re-purposed.
2. There is no limit to the amount of Access Groups you can create.
3. The Notes field in the Access Group page is a free text field which is designed for any use you determine. This can include identifying aspects of which types of users you wish to attribute to that group, or simple reminders you wish to have access to. Please note: if erased, this field will not be retained.
4. If permissions are changed for an Access Group, once submitted, Users belonging to that Access Group will be updated with those new sets of permissions.
5. Without an Access Group, a User cannot be created/updated.
6. A New User cannot be successfully created without identifying their Access Group; therefore, your first step is to define Access Groups for your Users.

4. SETTING UP ACCESS GROUPS

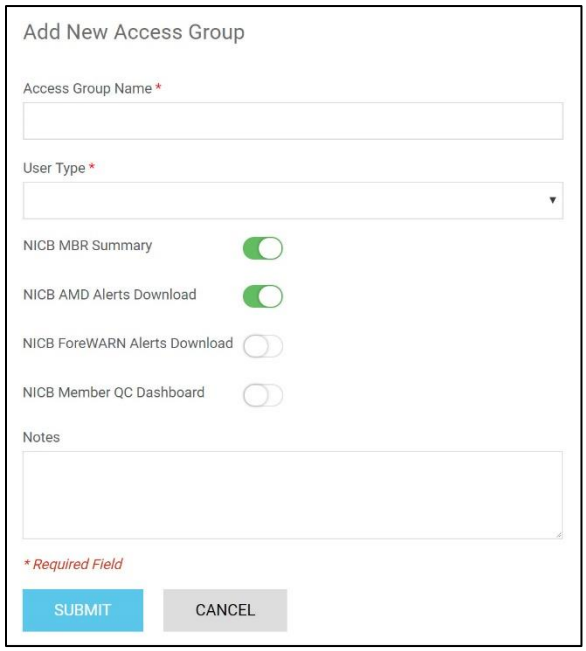
Access Groups are a fundamental component needed to add User. So, if there are no Access Groups, or if the existing Access Groups are not appropriate, you'll have to create it first.

1. Click **Access Groups**.



2. Then click **Add Access Group**

1. Notice that some fields have **a red asterisk ***: these are required fields that must be filled in.
2. You can name the **Access Group** anything you want; we recommend using a name that is descriptive enough to know who should be in that group.
3. The **User Types** are pre-filled and cannot be changed, so choose the one that best fits the users that will be added to this **Access Group**.
4. You can give the **Users** in this group access to some, or all, of the products listed, depending on what they need to perform their jobs. Use the toggle button to turn permissions **ON** or **OFF** (green means ON).
5. The **Notes** field is a free text area where you can type any information you think is necessary.
6. Click **Submit** when you are ready to create your Access Group.



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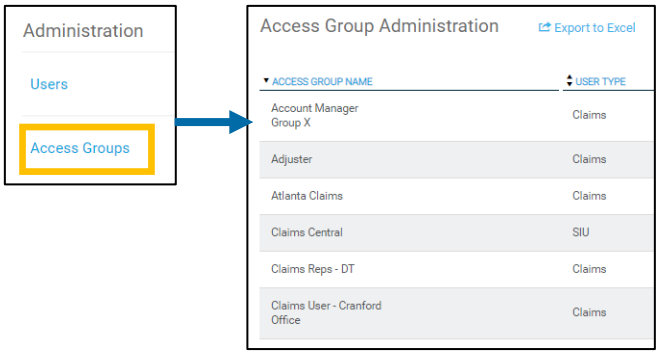
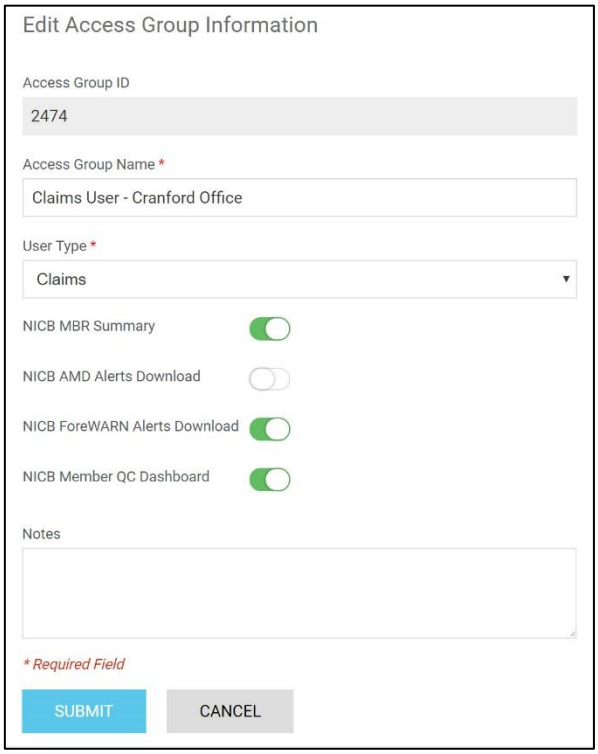
5. EDITING AN ACCESS GROUP

There might be times when you'll need to make some kind of change to an Access Group. Whether it's user information, product permission, or system access, editing an Access Group is quick and easy.

1. Click **Access Groups** and find the group to be edited. Any change you make to an **Access Group** will update the permissions for any User belonging to that group. The benefit is that you don't have to edit your individual Users.
2. To edit an **Access Group**, click anywhere on the row where the group is displayed.



3. You'll notice that the only change that you cannot make is to the **Access Group ID**.
4. An **Access Groups Name** can be re-named and re-purposed, but once created, it cannot be deleted.
5. If you do not need the additional Access Group, give it a descriptive name, like Do Not Use, No Longer In Use, or Not Needed. This way, if you do need to create a new Access Group in the future, you'll just rename the Access Group.
6. The **User Types** should be the one that best fits the users that are in this Access Group.
7. You also might want to toggle the permissions to **ON** or **OFF**. Green means ON.
8. The **Notes** field is a free text area where you can type any information you think is necessary.
9. Make any changes that are needed and click **Submit**.



6. USERS

1. The User function is designed to ease the administrative burden of providing your employees with access to ISO ClaimSearch.
2. Anyone needing access to ISO ClaimSearch must have their own User ID.
3. It's important to know that a User's activity in ISO ClaimSearch is tracked and subject to compliance audit.
4. Creating individual User IDs avoids any confusion or misrepresentation of actions performed by your employees.
5. It's through this process that the User will automatically be assigned a User ID and given instructions on how to log into ISO ClaimSearch.

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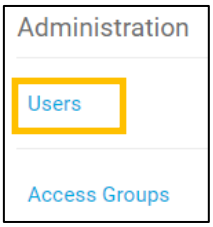
Basic Facts About Users

1. Users cannot be Deleted but they can be De-Activated and Re-Activated.
2. Search Bar allows you to search by: ISO ClaimSearch User ID, First Name, Last Name, E-Mail and Phone Number.
3. Users can be exported to Excel. The export will include your User's basic details, permissions and Last Log On Date.

7. SETTING UP USERS

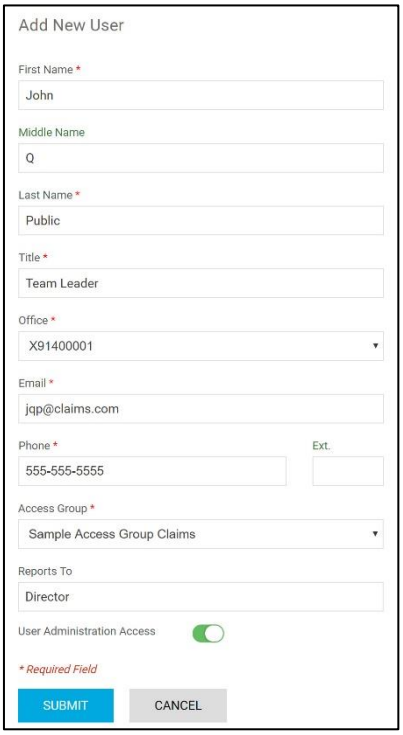
Part of the process for adding a User is choosing an Access Group. So, if there are no Access Groups, or if the existing Access Groups are not appropriate, you'll have to create it first.

1. Click **Users**.



2. Then click **Add User.**

3. Most fields have a red asterisk*: these are required fields that must be filled in.
4. Enter the **Name** and **Title**. The title is up to you and but be consistent with company standards.
5. **Office** shows a drop-down list of your company's Office Codes that are in ISO ClaimSearch.
6. Enter the Users **Email** and **Phone number**.
7. **Access Group** shows a drop-down list of the Access Groups that exist for your company.
8. **Reports To** adds an additional filter to some system reports in the Usage Dashboard. It's up to you how best to use this field.
9. **User Administration Access** is for someone who will be an additional Admin.
10. Click **Submit** when you are ready to create the User.



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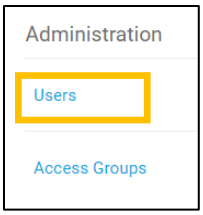
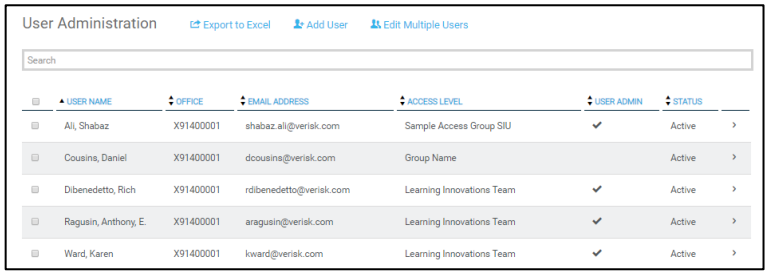
8. EDITING A USER

User Access types or levels cannot be edited unless the user is assigned to an Access Group. Edits made to an Access Group will apply to all Users assigned to that group. There will be times when you'll need to make some kind of change to a User. Whether you're changing an Office code, reassigning users to a new access group, inactivating users, or reactivating users, the edit function is a quick and easy way to get it done.

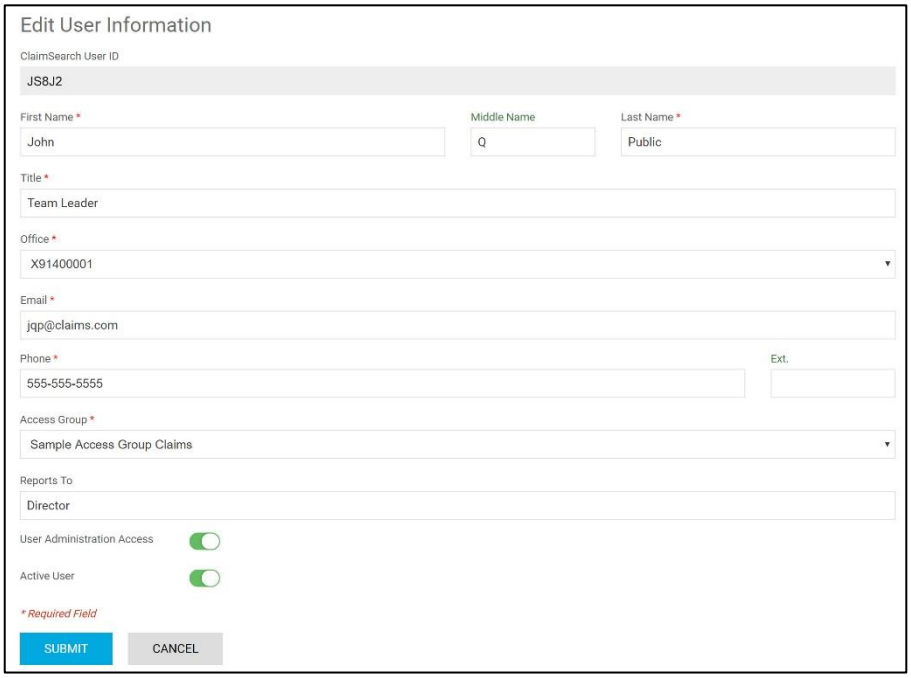
1. Click **Users** and find the record to be edited. If you have a lot of users, you can use the **Search** function to find a specific user.



2. To edit a **User**, click anywhere on the row where the user is displayed.



3. The only change that you cannot make is to the **ClaimSearch User ID**.
4. If you need to remove access to ISO ClaimSearch for a **User**, you'll need to change the status of the **Active User** toggle from **ON** to **OFF**.
5. To reactivate a **User**, you'll change the toggle to green.
6. Keep in mind that **Users** cannot be deleted, so all you can do is make the **User** inactive.



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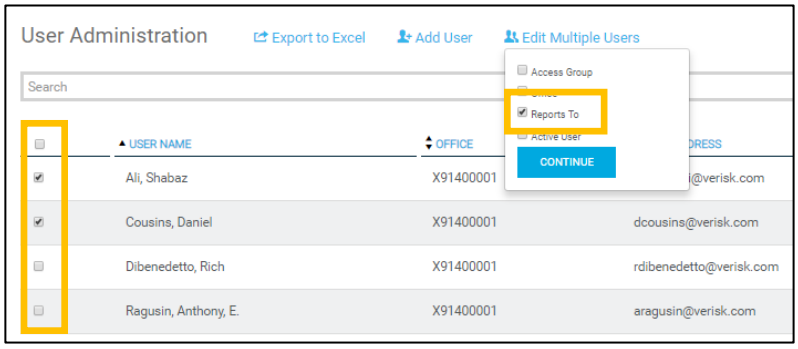
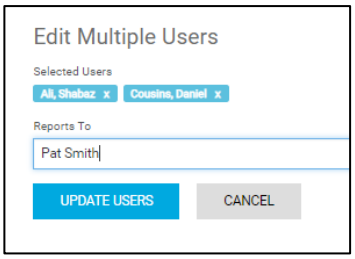
9. EDITING MULTIPLE USERS

If you need to make the same change to several Users, the Edit Multiple Users option makes it easy and quick.

1. Select the **Users** that you want to edit. To do that, simply click the box to the left of the User name. It might be helpful to use the **Search** tool if you have a lot of Users.
2. Click the **Edit Multiple Users** link and choose the type of edit to make from the dropdown. You can select one or more of the listed options. Click **Continue**.



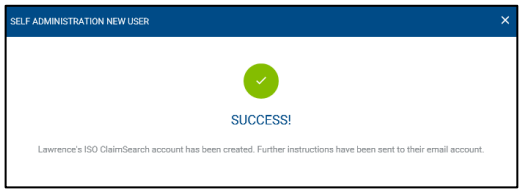
3. Make the change and click **Update** Users to apply the changes.



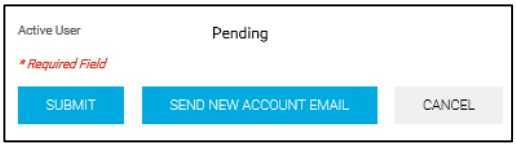
10. ACTIVATING USERS WITH SECURE LOGIN

If you need to make the same change to several Users, the Edit Multiple Users option makes it easy and quick. With Secure Login, the new user activation process is automated.

1. After successfully adding a new user you will see the **Success** message and there will be an email generated to the new user with a link that they will use to set up their accounts.



2. The user's profile will be **Pending** until they set up their new account. The Set-Up link will expire after four hours.



3. You can resend the email as many times as they need until they set up their account.
4. You will no longer need to provide them with the temporary password in this system.
5. This will also be the same process when you reactivate users in this system—see **Section 12 Self Administration Unlock Security Feature.**

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A. Sample Setup Email

Hello (name) and welcome to ISO ClaimSearch!

Your user id is (xxxxx)

Please click on the link below to setup your ISO ClaimSearch password:

Setup Password

Please note that the link above is only valid for 4 hours.

If you have any questions, please contact your ISO ClaimSearch Administrator:

ADMIN'S NAME
ADMIN'S EMAIL

Thank you,
ISO ClaimSearch Team.

B. URLs To Be Added To Trusted Sites

If your users report that they receive a PAGE CAN'T BE DISPLAYED Internet error in the course of set-up or unlock, we suggest using Chrome for the browser or for Internet Explorer (the version should be higher than 9) and the following URLs should be added to Trusted Sites:

https://claimsearch3.iso.com

https://claimsearch-cdn.iso.com/

https://api1.iso.com

https://api1.verisk.com

CS_password_reset@iso.com

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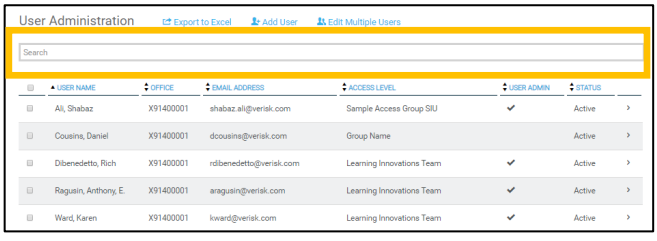
11. REACTIVATING INACTIVE USERS

If you need to make the same change to several Users, the Edit Multiple Users option makes it easy and quick. With Secure Login, the new user activation process is automated.

1. Search for the User in the User grid Search Bar.



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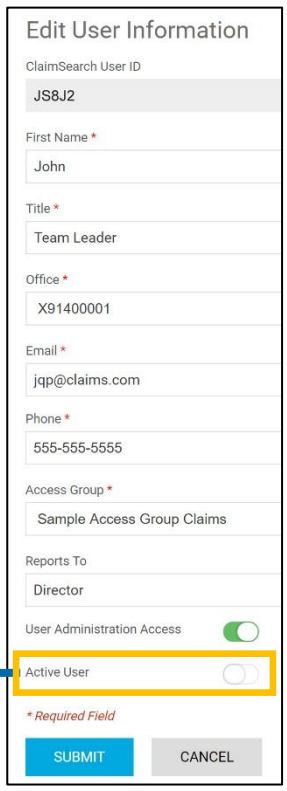
2. Be sure all the required fields have been filled out.
3. Turn the **Active User** toggle to On, which shows Green.



4. After Reactivating the user, check the upper right corner to see if the user must also be **Unlocked**.
5. If a User has gone inactive, they will need to initially log in with the temporary password, so be sure to provide this to them as well.

12. SELF-SERVICE UNLOCK SECURITY FEATURE

There are two reasons for an account to be locked: (1) Inputting an incorrect password. (2) Incorrectly answering the security questions will lock and deactivate the account.

A. Account locked due to inputting an incorrect password.

1. Entering a password incorrectly 3 times will trigger an email with instructions to **unlock** their account.
2. The user must click on the link, answer their security question, and create a new password.
3. If the link is no longer valid, they need to use the "Forgot Password" link on the ClaimSearch log in page to generate a new unlock.
4. The Administrator will not see an unlock icon for this scenario on the self admin screen. They will not show up as deactivated either.

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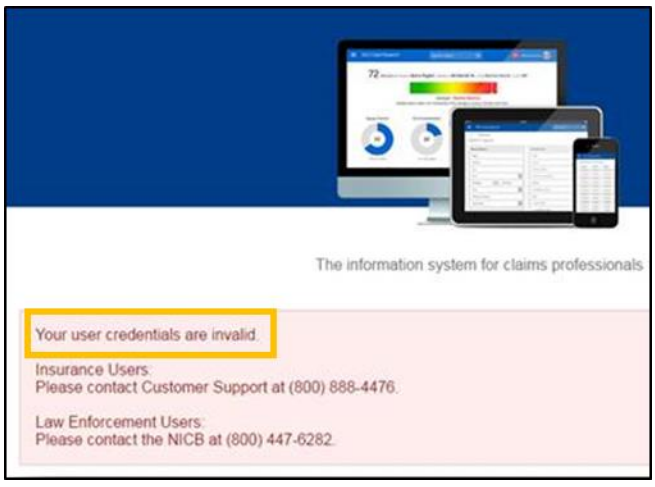
B. Account locked and deactivated due to inputting the wrong security question answers.

1. If the user gets their security questions wrong 3 times they will be locked and deactivated.
2. A message pops up telling them to contact their Administrator.

3. The Administrator will see the unlock icon for this user and the ID will show as deactivated.
4. Do not use the reactivate button. Instead use the unlock icon: It will generate an email that will allow the user to unlock and reactivate themselves.
5. Unless the user completes the entire process, they will remain locked and deactivated.
6. The Admin can generate the email again should the user let it expire. Once the Admin clicks on this icon it will generate an email to the user to get back in.

C. Your Credentials are Invalid

1. If the user sees a message similar to the one below stating, YOUR CREDENTIALS ARE INVALID, it means that their ID was already locked out and/or deactivated before your company's conversion to Self Admin.
2. The User should contact our customer service for assistance at 800-888-4476.



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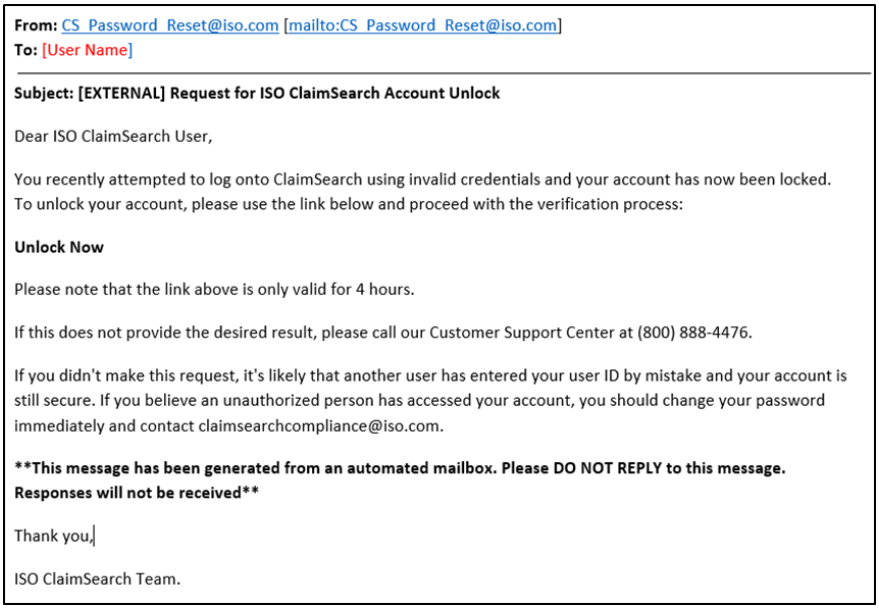
D. Sample of Unlock Email:



From: CS_Password_Reset@iso.com [mailto:CS_Password_Reset@iso.com]
To: [User Name]

Subject: [EXTERNAL] Request for ISO ClaimSearch Account Unlock

Dear ISO ClaimSearch User,

You recently attempted to log onto ClaimSearch using invalid credentials and your account has now been locked. To unlock your account, please use the link below and proceed with the verification process:

Unlock Now

Please note that the link above is only valid for 4 hours.

If this does not provide the desired result, please call our Customer Support Center at (800) 888-4476.

If you didn't make this request, it's likely that another user has entered your user ID by mistake and your account is still secure. If you believe an unauthorized person has accessed your account, you should change your password immediately and contact claimsearchcompliance@iso.com.

****This message has been generated from an automated mailbox. Please DO NOT REPLY to this message. Responses will not be received****

Thank you,

ISO ClaimSearch Team.

E. Helpful Tips in the Self-Service Unlock Feature

- After resetting the password, be sure that the old password is not auto-populating the password field.
- User will go inactive after 90 days of not logging on.
- ClaimSearch requires the most up-to-date version of Internet Explorer, or at least a version higher than 9.
- Administrators will confirm that every user's email address is correct and accessible by each user.
- The emails generated by ClaimSearch when you activate/reactivate, use the "forgot password link," or get locked out come from CS_password_reset@iso.com.
- If they are being blocked by your internal servers, users will receive a PAGE CANNOT BE DISPLAYED ERROR.
- CS_password_reset@iso.com should be added to trusted sites.

F. New Password Policy for Self-Service Account Unlock

- Password now requires at least 1 capital, 1 lower case alphabet and 1 number and one of the following special characters: . ! # $ % & ' ( ) * + , - . : ; < = > ? @ [/] ^ _ ` { | } ~
- Password cannot have more than 4 consecutively repeated characters.
- Password length must be a minimum of 8 characters and can be a maximum of 20 characters.
- Password cannot not match previous 12 passwords.
- A green checkmark will appear when your new password is compliant.

13. IF YOU NEED ASSISTANCE

If you need immediate assistance, we offer a Live Chat option that puts you in contact with our Customer Service representatives. To start a chat, click the Customer Service Live Chat link. This option is available Monday to Friday from seven a.m. to nine p.m. eastern standard time. If you have any questions about Self-Administration, you can send us an email at njsupport@iso.com or call us at 800-888-4476.

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