Company Contact Management & Registration
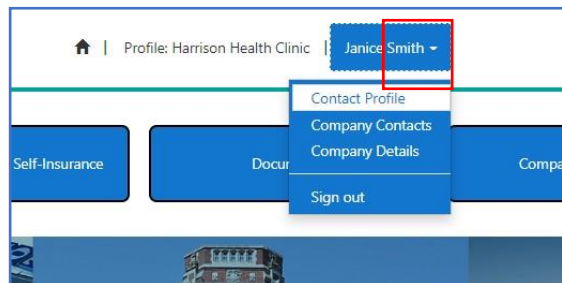# Self-Insurance Plus (SIP)

Both private self-insured employers (SI) and non-private self-insured (Non-SI) companies (insurance companies, local public entities, or pools – group WC/intergovernmental/not-for-profit) have a role in the SIP Portal. Company registration is for the person within your company who is responsible for setting up your organization within the system and managing company contacts who have SIP roles and permissions. In SIP, we refer to this individual as a Company Admin, regardless of self-Insurance status.

Once your company is established in SIP, the Company Admin can add contacts, assign roles/permissions, and send invitations to register, all within the system.

Profile and Contact Management

Portal users with *Company Admin* permissions manage their company profile within SIP. *Company Staff* can access role specific features of the portal but cannot invite users to join SIP. *All users* can manage their specific contact information in the portal. ***If someone is working for multiple separate companies, do not register in the SIP system. Please contact the IWCC immediately for assistance setting up the account; this is referred to as a multiple-company contact and requires special attention from the IWCC.***

To access the contact options, there is a drop-down arrow to the right of the logged in user's name. Click this arrow to access the *Contact Profile, Company Contacts, Company Details,* and the *Sign out* option, which is used to log out.

The information contained within this drop-down allows a *Company Admin,* whether SI or Non-SI, to manage company users within the SIP system. The Company Admin has the responsibility of setting up the company within SIP. They

Self-Insurance Plus – Roles

There are two *roles* within the SIP system - A *Company Admin* and a *Company Staff* role.

▶ SI Company Admin can access all portal features within SIP including managing company portal users.
▶ SI Company Staff can access all portal features, but they cannot assist with managing portal users.
▶ Non-SI Company Admin can access Assessments and manage company portal users.
▶ Non-SI Company staff can access Assessments but cannot assist with managing portal users.

establish themselves within the system and generate company contacts, assign roles to each contact, and send an invitation to each to join the SIP system. This invitation goes out in the form of an email. The Company Admin must select contacts specifically for the roles of *primary, secondary,* and *assessment contacts* for the company.

Contact Profile

The contact profile provides information about the logged in user of SIP. As shown, contact name, company name, address, and phone number are displayed. Everything within the first section of the screenshot below can be updated by the user, ***except for the email address***. If edits are made, click *Save & Close* to save changes.

The *company profile* associated with the contact is displayed (in this case, Harrison Health Clinic.) Below the profile is the web role(s) for the contact. Janice Smith is a SI Company Admin.

Contact Profile

First Name *	Middle Initial	Last Name *
Janice		Smith

Company Name *
Harrison Health Clinic

Title *
CEO

Phone *	Phone Extension	Mobile Phone
(217) 206-4216		

Email *
mcdfad1+harrisonhealthclinic@gmail.com

Street Address 1 *		Street Address 2
675 South Main Street		

City *	State *	Zip *
Springfield	Ill	62629

Company Profiles

Profile ↑

Harrison Health Clinic ⌄

Web Roles

Name ↑

SI Company Admin

Save & Close

Company Contacts

Selecting *company contacts* from the drop-down menu takes you to a screen that allows you to manage all the users for the company (if you are a Company Admin). If you are a company staff contact, you have view-only access to company contacts.

The *Create New Contact* button allows a Company Admin to add company contacts to the SIP portal. Click *Create New Contact.*

Company Admins: If you are aware that a contact you are adding works for another company OR the registration fails because of a duplicate email address, please use the "Contact Us" link below to have us add that person to your company.

Full Name	Email	Phone	Web Roles	Responsibility	Status	
Carlos Hernandez	mcdfad1+Carlos@gmail.com	(217) 206-5175	SI Company Admin	SI and Assessment	Active	⌄
Johnny Smith	mcdfad1+johnny@gmail.com	(217) 206-1255	SI Company Staff	Assessment	Active	⌄

The Company Admin fills out the *Add Company Contact* form to add new users and clicks *Save & Close.* This form is used to add one contact at a time to the company profile.

Add Company Contact

First Name *

Middle Initial

Last Name *

Title *

Responsibility *

Company Name *

Phone *

Phone Extension

Mobile Number

Email *

Is the Contact Address different from the Company Address? *

⦿ No ○ Yes

Save & Close

Once the contact has been added to SIP, click the down-arrow to the right of the added user. Options allow you to send an invitation, disable the contact, give/remove admin role, and give/remove staff role. When you make a selection, a success message will appear letting you know an action was taken on the specific contact. Once Web Role and Responsibility have been set for the new contact, select Send Invitation for them to join SIP.

Company Details

Selecting *company details* from the drop-down displays company information, primary/secondary/assessment contact information, as well as any subsidiaries/affiliates related to the parent company. See screenshot below. The only changes that can be made on this screen involve contacts. Click an X to delete a contact and click the magnifying glass to search for the replacement contact. Ensure the replacement contact already exists in SIP or they cannot be added to this screen. Once updates are made, click *Submit,* and the changes will be submitted into SIP and to the IWCC. Note: changes to these contacts are advised before completing a renewal application or an assessment.

Portal Registration

If you are a current or former Illinois approved private self-insurer, or an insurance company, local public entity, or group pool receiving assessments, you do not need to register in SIP. You will be receiving an invitation from the State of Illinois. You will click the link within the email, establish a password, create two levels of authentication (for security purposes), and log into SIP. If you fall into either of these categories, skip to page 7.

For a first-time registration, navigate to the self- insurance portal by clicking https://iwccsip.dynamics365portals.us. The link brings up the SIP portal page. In the top-right corner of the screen, click *Register*.

Should I Register for SIP?

Use of the Registration link on the SIP Portal page is only for initial online registration of a Company Contact representing either:

A. A Company not currently Self-Insured and initiating the process of applying for the Self-Insurance privilege, or
B. A Company not already registered with the IWCC as an insurance company, local public entity, or group pool needing to comply with IWCC requirements to receive and pay IWCC Assessments.

The registration of ALL other Company Contacts is initiated by a registered SIP Company Administrator or IWCC staff. If you have any doubt about the advisability of using the Registration link, please contact the IWCC at wcc.selfinsurance@illinois.gov.
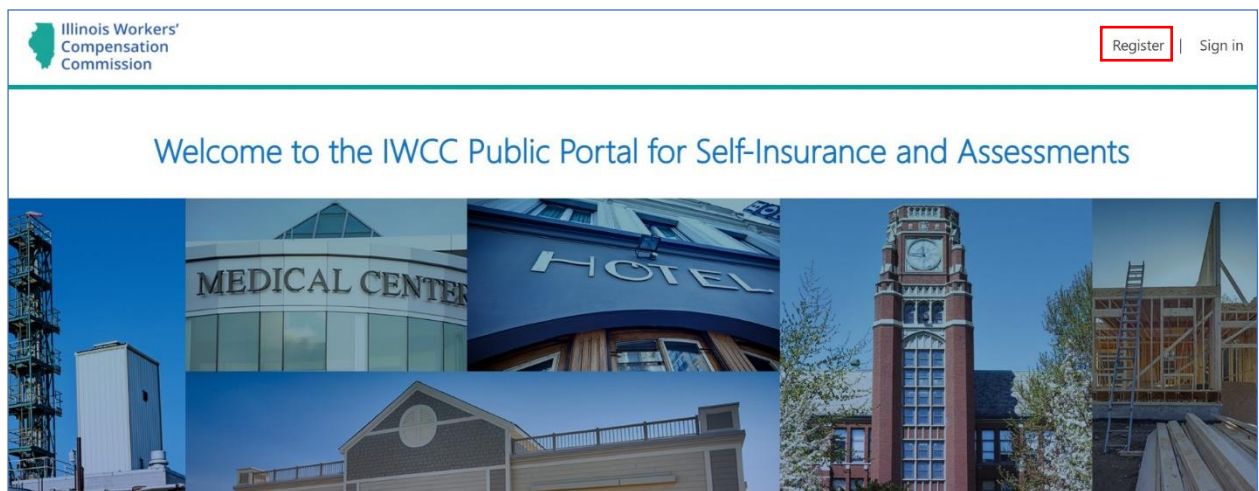
A registration screen appears, and you must provide company and contact information. Prepare to provide the *FEIN* and *Company Type* selection pertinent to your registration. The system requires the same information for Private Self-Insured Companies as well as Insurance Companies, Local Public Entities, and Pools-Group WC/Intergovernmental/Not-For-Profit Companies for registration purposes.

An email address and phone number are required for company contacts. If the contact's address differs from the company's address, select the yes button and additional address fields display to capture this information. Notice the red asterisks next to certain fields in the screenshot that follows. These are mandatory fields and must be filled in before submitting the registration request. The system will display an error message and prevent registration if all the mandatory fields have not been completed.

Note: If your email address is already registered in the SIP system, you will receive an error message. Please contact the IWCC to continue with the registration process.

Enter the code in the box and click the submit button at the bottom of the screen. Please note that the code is not case sensitive, so capitalization is not an issue. You may select a new image if you have trouble with the first one by clicking *Generate a new image*. You may select the *Play the audio code* option to listen to the code and enter it into the box. A success message is presented upon clicking *Submit*, and the IWCC SIP team will review the registration information. Allow 1-2 business days for the IWCC to set up the account.

New Registration

SIP Home > **New Registration**

New Registration

Thank you for submitting your registration request for the electronic system to complete Assessments and Office of Self-Insurance documents. An IWCC staff member will process your request and send an email asking you to complete your account setup within 1-2 business days. Please monitor your email's inbox and spam folders. For any questions or concerns, please contact wcc.selfinsurance@illinois.gov. **x**

Once the IWCC has set up your SIP account, you will receive an email from Illinois.gov that contains a button to *Activate Okta Account.* Click the green button to activate your account. **Note that the link expires in 7 days**. If you fail to activate the account within 7 days, please contact the IWCC at wcc.selfinsurance@illinois.gov for assistance.

Once you click the activate button, a new page asks you to create a password and confirm/repeat the password. There are requirements for the password, and those are listed on the screen for your convenience. You will receive an error message and will not be able to finalize your registration request if the password requirements are not met.

After you create and confirm your password, there are two additional, optional security criteria you may use to reset or unlock your account. The first option is to add a phone number for the occasion that you need to reset your password or unlock your account using SMS. Click the *Add Phone Number* button. Be sure to use a phone number that is easily accessible when registering in SIP. Once you enter your phone number into the box and click the *Send Code* button, you will receive a code via SMS.

Check your phone to retrieve the passcode and enter it into the text box. Click *Verify*, then click *Done*.

You also have the option to select *Voice Call Verification.* This allows you to enter your phone number and to receive a phone call and code. Click the *Add Phone Number* button.
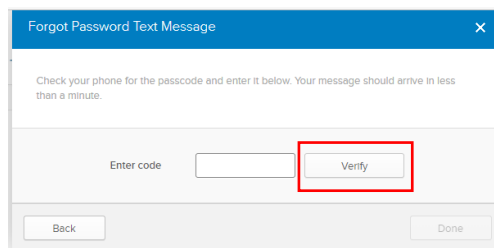
Enter your phone number into the text box. Enter a phone extension, if applicable. Be sure to have the phone accessible as you will receive a call promptly. Click Call.
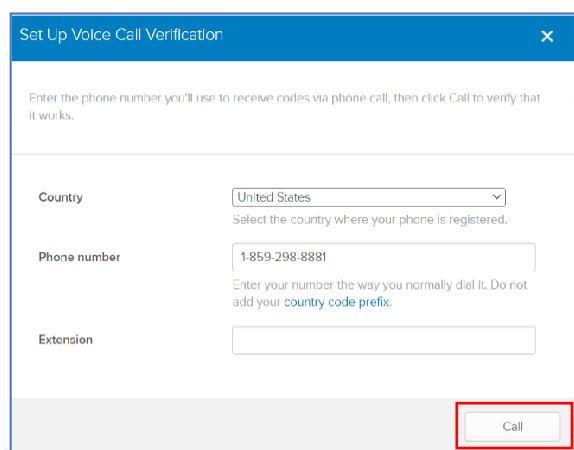
Enter the code you receive via phone call into the text box and click *Verify.* If the code is correct, you will get a message (as shown below) successfully verifying the phone number. Click *Done.*
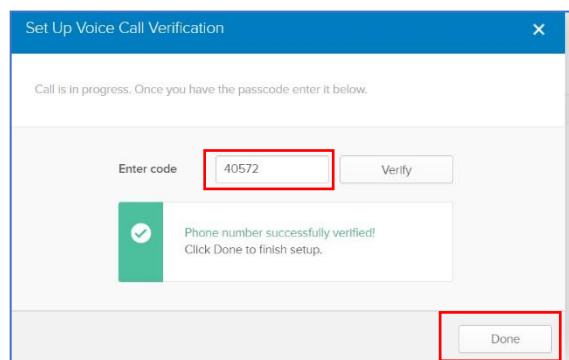
The last item on this screen requires you to pick an image for your OKTA account. When you have made your selection, click the *Create My Account* button shown in the following screenshot.
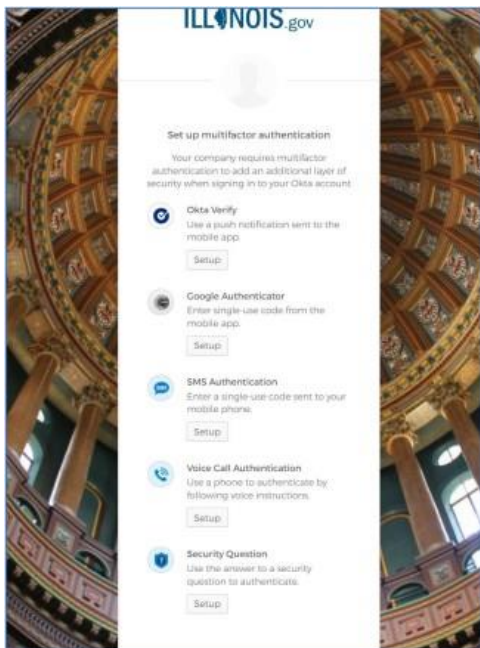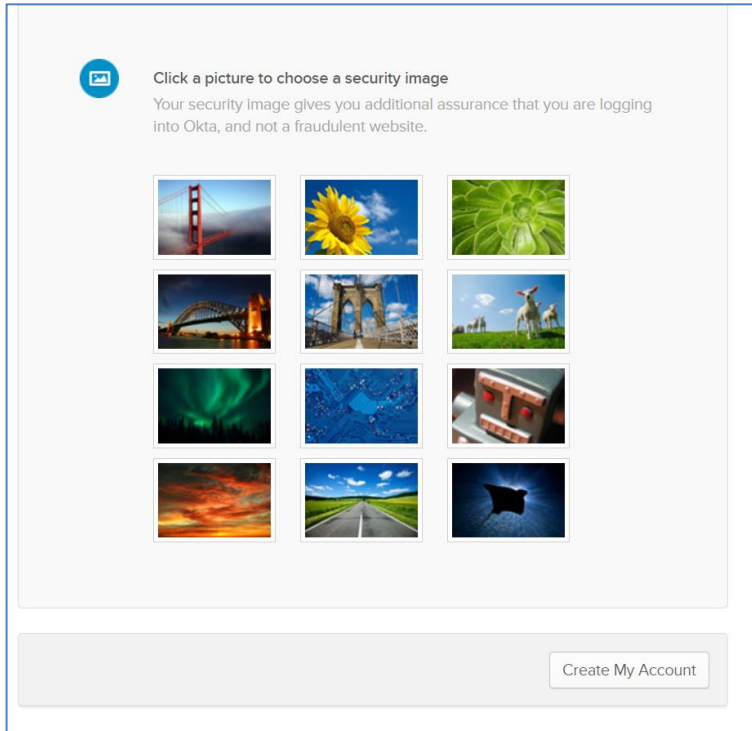
The next screen shown is an Illinois.gov webpage that requires you to set up multifactor authentication. **It is recommended to select two methods of authentication.** This is an added layer of security for you and is only required at initial setup of your account. **Note: If you select Okta Verify or Google Authenticator, you need to download those apps to your mobile device beforehand.**

You have the option to select *Okta Verify*, a push notification to the mobile app. If you choose this one, click the button and select iPhone or android for your phone type. Click *Next (*be sure to download the Okta Verify from the App Store or Google Play Store onto your mobile device).

If you select the *Google Authenticator* option, click the setup button, select iPhone or android for your phone type. Click *Next* (be sure to download the Google Authenticator from the App Store or Google Play Store onto your mobile device).

The *SMS Authentication* option prompts you to enter your phone number (including area code) and click *Send Code.* You will receive a text message containing a code. Type your code into the *Enter Code* box on the screen and click *Verify.*

The *Voice Call Authentication* option prompts you for your phone number. Once you enter your phone number, click the *Call* button. You will receive a phone call, and you will be given a code number. Enter the code number into the box and click *Verify*.

Another option is to select a *Security Question.* Click the *setup* button, and you are presented with a drop-down of options to choose from. Select the question you prefer, type the answer in the text box provided, and click *Save.*

Note: New multifactor authentication methods may be added in the future.
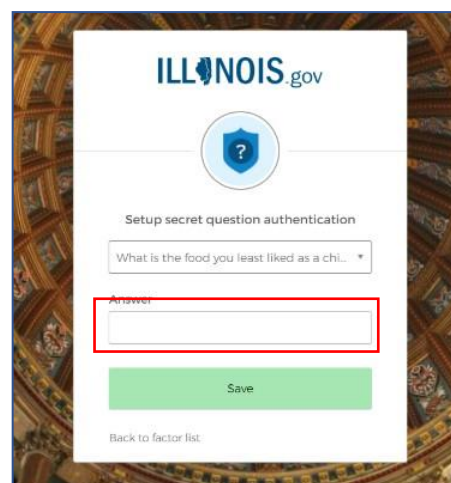
On the next screen, you have the option to select which of your authentication factors you wish to use to log into SIP. Clicking the down arrow will allow you to switch from one authentication factor to another.
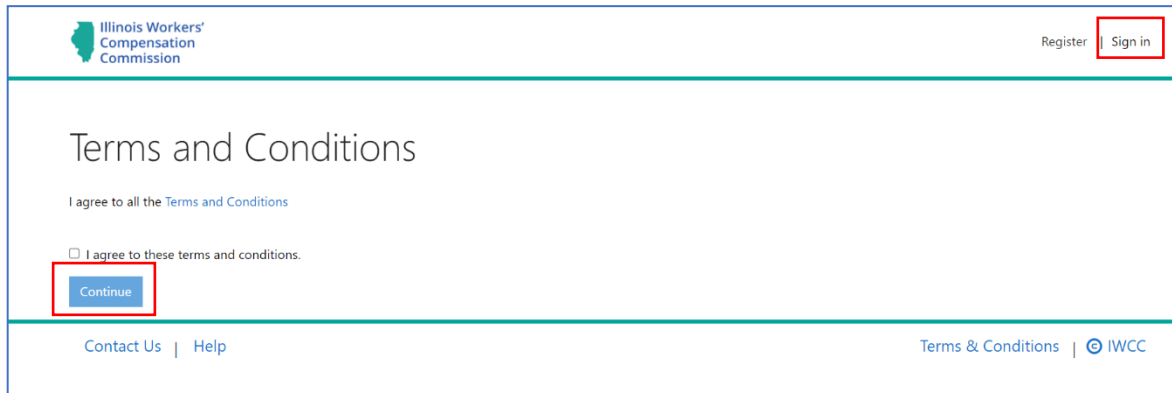
Please note, the image you select shows up after you log in successfully the first time. It will not appear immediately after selection.

Once your selections are complete and your account has been verified, click the *Finish* button at the bottom of the screen. You have completed the process and have an Okta Account through Illinois.gov. You are taken to an Illinois.gov website displaying the SIP button you will use to access the portal. Click this button.
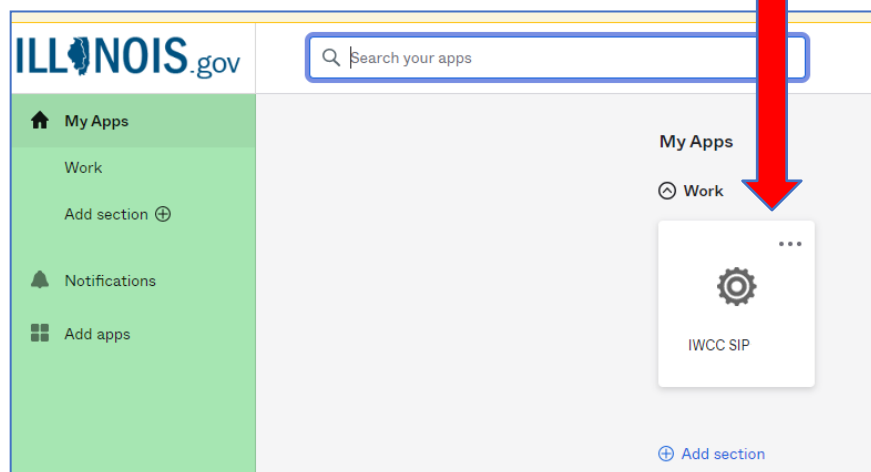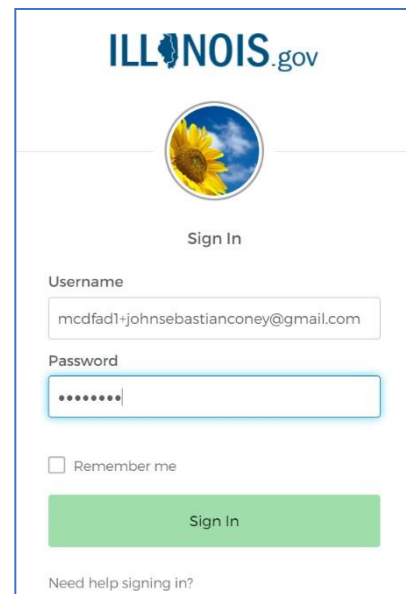
You are taken to the SIP portal. Click the *Sign in* button on the top right of the screen. The *Terms and Conditions* for the portal may be found by clicking the blue *Terms and Conditions* link. Once you have read the terms and conditions, click the box next to *I agree to these terms and conditions* and click *Continue.*
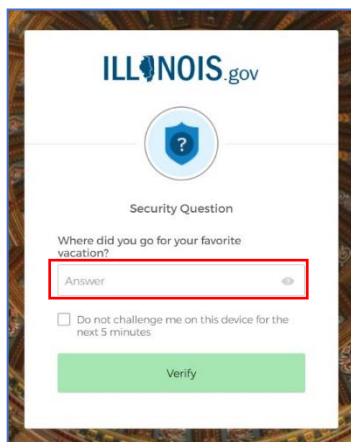

You are now a logged in portal user in the SIP system. The next time you navigate to the SIP portal, simply click *Sign in,* enter your *Username* and *Password*, and click *Sign In.* The image you selected as part of the authentication process shows up in the sign in box once your username has been identified.

You will be prompted for next level authentication. In the following example, a security question is presented, type the response into the answer box, and click *Verify.*

Registration is complete and you are logged into the Self-Insurance Plus web portal.

Forgotten Password/Password Reset

If you forget your password to log into the portal, you will use Okta to reset your password. After navigating to the SIP portal, click *Sign In.* Notice on the screen there is a *Need help signing in?* question. Click this sentence, as it is a link to help you retrieve your password.

Clicking this link opens options to assist you. For this example, let us retrieve the password. Click *Forgot password?*

On this screen, enter your email address and select one of the mechanisms you originally set up to reset your password. Let us select *Reset via Email* for this example. Enter your email address and click *Reset via Email.*

A success message is displayed letting you know an email has been sent to you. Click *Back to sign in,* as shown below. The email you entered is displayed in the message to allow you to verify for typographical errors (in case you do not receive the email from Okta.)

*NOTE: If you are unable to reset your password, please refer to the original Illinois.gov email to access your organization's sign-in page and follow the instructions to gain access to your account. See an **example** below.*

Click the following link to activate your Okta account:

Activate Okta Account

This link expires in 7 days.

Once the account has been activated the link in this email will no longer work and you will need to access your application by going to https://illinoisgov.oktapreview.com

Your username is **siplustesting+johnhamptonIGA@gmail.com**
Your organization's sign-in page is https://illinoisgov.oktapreview.com

If you experience difficulties accessing your account, you can send a help request to your system administrator using the link: https://illinoisgov.oktapreview.com/help/login

This is an automatically generated message from State of Illinois Okta. Replies are not monitored or answered.

The next step is to check the email account of the address you supplied to Okta**.** Click *Reset Password*. Note the link expires in 4 hours.

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State of Illinois - Preview Workforce - Okta Password Reset Requested

Hi **John,**

A password reset request was made for your Okta account. If you did not make this request, please contact your system administrator immediately.

Click this link to reset the password for your username, siplustesting+johnhamptonIGA@gmail.com.

Reset Password

This link expires in 4 hours.

If you experience difficulties accessing your account, send a help request to your administrator:

Go to your Sign-in Help page. Then click the Request help link.

The next screen prompts you to create a new password. Criteria are listed to create a successful and safe password for your account. Create a new password, repeat it for confirmation, and click *Reset Password.* You will proceed to sign into your account and successfully log into SIP.

Final Notes on Registration: Once registered, non-private self-insured companies will not be able to add subsidiaries or affiliates from the portal. Contact the IWCC via email at wcc.selfinsurance@illinois.gov for assistance. Include the *Company Name, Street Address, City, State, Zip Code, FEIN, and the Company Type (insurance Company, Local Public Entity, or Pools-Group WC/Intergovernmental/Not-For-Profit)* so the IWCC can add the correct subsidiary/affiliate information into your profile. You may also click the *Contact Us* link on the bottom of the SIP portal screens to access the IWCC email address.

Finally, to reiterate, if you are a contact for more than one company registered in the SIP system, please email the IWCC SIP team at wcc.selfinsurance@illinois.gov for assistance in setting up your account.

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Reset your Okta password

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 10 passwords
- At least 1 day(s) must have elapsed since you last changed your password

New password

Repeat password

Reset Password

Back to sign in