

Steps to create an INVOICE for payment of Licence Renewal fees or Licence Amendment fees

Updated August 1, 2022

IMPORTANT NOTES **PRIOR TO CREATING AN INVOICE**

Invoices are currently only acceptable for the annual Licence Renewal Fee or for a Mass Licence Amendment Fee. *Bulk payments for other fees can be submitted via cheque to the ICM office by the General Operating Agent, Adjuster Designated Representative and/or Authorizer/Appointee at the Insurer that sponsors the licence, and is required to be used on an ongoing basis.*

Invoices can **only** be created by General Operating Agents, Adjuster Designated Representatives and/or Authorizers/Appointees at Insurance Companies that sponsor the licence(s).

Alternative to invoices: Licence holders wishing to renew their licence can **individually** pay by VISA or MASTERCARD within the online renewal system once they are completing and processing their individual online renewal(s).

Submitted Invoices will be void after 45-days of inactivity.

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Steps for General Agency Operating Agents or Adjusting Firm Designated Representatives

Step 1: Log in to the online portal.

The Operating Agent/Designated Representative will log-in to the online portal at <https://lms.icm.mb.ca/lcmPortal/Account/> with their **numerical User ID** and **Password**.

ICM LICENSING PORTAL

Existing Users Log In

User ID

Password

Log In

Forgot your User ID?

Forgot your password?

OR

Register as new applicant

Note: The ICM Portal supports the following browsers:

- Google Chrome
- Internet Explorer 9.0+
- Mozilla Firefox

All PDF files require the latest version of Adobe Acrobat Reader to download.

Step 2: Verify Email Address.

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LICENSING PORTAL

Update Profile

Please ensure the following email address is correct. Click save to proceed.

*Email

Save

Step 3: Proceed to Organization Tab

Click on Organizations as demonstrated in sample picture below, and select the organization that you are wishing to create the invoice for:

The screenshot shows the ICM Licensing Portal dashboard. The top navigation bar includes the ICM logo, the text "LICENSING PORTAL", and a user profile for "Jon Snow". The left sidebar contains a menu with items: Home, Information, Licences, Applications, CE, E&O, Exams, Payment, and Organizations. An orange arrow points to the "Organizations" menu item. The main dashboard area displays several widgets: "Licence Status" (0 Application (In Progress), 1 Issued, 0 Renewal), "Exams" (0 Results, 0 Scheduled), "Account Balance" (Licence Fees: \$0.00, Exam Fees: \$0.00), "Errors & Omissions" (K-60000-555555-2016, ORGANIZATION E&O EXPIRED), and "Continuing Education (2016-2017)" (General and/or Auto Only: 4.00, 8).

Click on Payment and then "Invoice(s)" as demonstrated in sample picture below:

The screenshot shows the ICM Licensing Portal dashboard for "ABC Insurance Agency Inc.". The top navigation bar includes the ICM logo, "LICENSING PORTAL", a "Go Back" button, and the user profile for "Jon Snow". The left sidebar menu is expanded, with "Payment" highlighted in green and "Invoice(s)" highlighted with an orange arrow. The main dashboard area displays several widgets: "Licence Status" (1 Application (In Progress), 194 Issued, 2 Renewal), "Account Balance" (Licence Fees: \$0.00, Exam Fees: \$0.00), "Errors & Omissions" (K-60000-555555-2016, NOT COVERED), "Application Status (1 in progress)" (a pie chart showing 1 Pending Authorizer's Review), and "Application Assignees" (a bar chart showing 1 Unassigned).

Step 4: Create New Invoice

Click on New Invoice as demonstrated in sample picture below:

The screenshot shows the 'Current Invoices' page in the LICENSING PORTAL. The header includes the ICM logo, 'LICENSING PORTAL', a 'Go Back' button, and the user name 'Jon Snow'. A sidebar on the left contains navigation links: Home, Applications, E&O, Payment, Users, and Public Search. The main content area is titled 'Current Invoices' and features a 'New Invoice' button highlighted with an orange arrow. Below this is a 'Show 10 entries' dropdown and a search box. A table header is visible with columns: Invoice #, Type, Organization, Total Amount, and Status. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

Select “Renewal” or “Amendment” as demonstrated in sample picture below (“Renewal” would be selected for payment of Licence Renewals; “Amendment” would be selected for payment of licence amendments”):

The screenshot shows the 'Create Invoice' page in the LICENSING PORTAL. The header is identical to the previous screenshot. The sidebar on the left has navigation links: Home, Licences, Applications, E&O, Payment, Users, and Public Search. The main content area is titled 'Create Invoice' and features a 'Type' dropdown menu with 'Amendment' and 'Renewal' options. An orange arrow points to the 'Amendment' option. Below the dropdown is a 'Total Amount: \$0.00' label and a search box. A table lists licensees with columns: Licensee, Licence Number, Licence Class, and Fee. The table contains four rows of data.

| Licensee | Licence Number | Licence Class | Fee |
|-------------------------------------|---------------------|----------------|----------|
| <input type="checkbox"/> Jon Snow | F-60000-555555-2016 | AGENT/BROKER 1 | \$ 70.00 |
| <input type="checkbox"/> Rob Stark | G-61000-555555-2016 | AGENT/BROKER 2 | \$ 70.00 |
| <input type="checkbox"/> Ned Stark | K-62000-555555-2016 | AGENT/BROKER 3 | \$ 70.00 |
| <input type="checkbox"/> Lady Stark | J-63000-555555-2016 | AGENT/BROKER 3 | \$ 70.00 |

Check off all licensees that you are wishing to prepay, and watch the “Total Amount” change to total the sum of the fees included as demonstrated in sample picture below.

The screenshot shows the 'Create Invoice' interface. At the top, the ICM logo and 'LICENSING PORTAL' are visible, along with a 'Go Back' button and the user's name 'Jon Snow'. The left sidebar contains navigation options: Home, Licences, Applications, E&O, Payment, Users, and Public Search. The main content area is titled 'Create Invoice' and features a 'Type' dropdown menu set to 'Renewal'. Below this, the 'Total Amount' is displayed as '\$740.00'. A table lists the licensees to be invoiced:

| Licensee | Licence Number | Licence Class | Fee |
|--|---------------------|----------------|-----------|
| <input checked="" type="checkbox"/> Jon Snow | F-60000-555555-2016 | AGENT/BROKER 1 | \$ 185.00 |
| <input checked="" type="checkbox"/> Rob Stark | G-61000-555555-2016 | AGENT/BROKER 2 | \$ 185.00 |
| <input checked="" type="checkbox"/> Ned Stark | K-62000-555555-2016 | AGENT/BROKER 3 | \$ 185.00 |
| <input checked="" type="checkbox"/> Lady Stark | J-63000-555555-2016 | AGENT/BROKER 3 | \$ 185.00 |

Two options:

1. ***Licence Renewal:*** As noted above, ensure you change the drop down from the default of “Amendment” to “Renewal” when creating invoices for renewal fees. Ensure all agents that you are wishing to have the renewal fees applied to are listed in this invoice with the correct annual licence fee as per Regulation [73/93](#). **\$0.00 fees are not acceptable payment for “Renewal”.**
2. ***Amendment of a Licence:*** The fee of \$70 is required for the amendment of the licence(s) as outlined in Regulation [73/93](#). If there is a mass amendment for the same individual who holds Life and Accident & Sickness licences, the required fee is \$70 per licence. Mass amendments typically are provided by the ICM directly to the Authorizer when requested. If you are considering amending multiple licenses, prior to doing so, please email contactus@icm.mb.ca to determine if a mass amendment would be applicable in your case.

Click “SAVE” to simply save the information **OR** click “Submit” to submit the invoice to the ICM. If the user clicks “Save” the information is not yet submitted to the ICM and can be amended before submitting it to the ICM. Once the invoice is submitted, the user can click “VIEW” to view their invoice or print it for their records.

Provide the cheque to the ICM in the full amount along with the ICM invoice number matching the invoice being submitted. **Credit card payments are currently not acceptable for invoice payment.**

When an Invoice is Submitted, the view for the O/A or D/R will be as follows:

Invoice 666666

Invoice #: 666666 Type: Renewal Status: Submitted 
Created: Apr 01, 2020 Created By: Jon Snow
Total Amount: \$1,110.00

| License Number | License Name | Licence Number | Licence Class | Licence Fee |
|----------------|------------------|--------------------|----------------------------------|-------------|
| 555555 | Rob Stark | G-555555-1899-2019 | GENERAL AGENT/BROKER 2 | \$185.00 |
| 888888 | Jon Snow | K-888888-1899-2019 | GENERAL OPERATING AGENT/BROKER 3 | \$185.00 |
| 666666 | Cersei Lannister | F-666666-1899-2019 | GENERAL AGENT/BROKER 1 | \$185.00 |
| 999999 | Catelyn Stark | F-999999-1899-2019 | GENERAL AGENT/BROKER 1 | \$185.00 |
| 444444 | Ned Stark | G-444444-1899-2019 | GENERAL AGENT/BROKER 2 | \$185.00 |

Total Amount: \$925.00

Cancel Invoice

Print Back

Steps for Insurance Company Appointees

Step 1: Log in to the online portal.

The Appointee will log-in to the online portal at <https://lms.icm.mb.ca/lcmPortal/Account/> with their **numerical User ID** and **Password**.

ICM LICENSING PORTAL

Existing Users Log In

User ID

Password

Log In

OR

Register as new applicant

Forgot your User ID?

Forgot your password?

Note: The ICM Portal supports the following browsers:

- Google Chrome
- Internet Explorer 9.0+
- Mozilla Firefox

All PDF files require the latest version of Adobe Acrobat Reader to download.

Step 2: Verify Email Address.

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LICENSING PORTAL

Update Profile

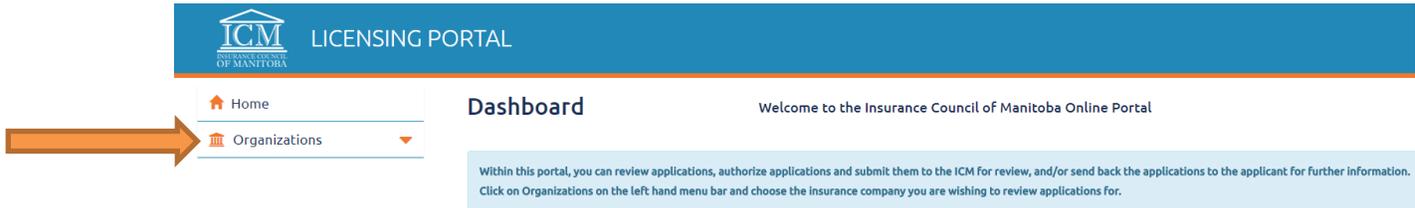
Please ensure the following email address is correct. Click save to proceed.

*Email

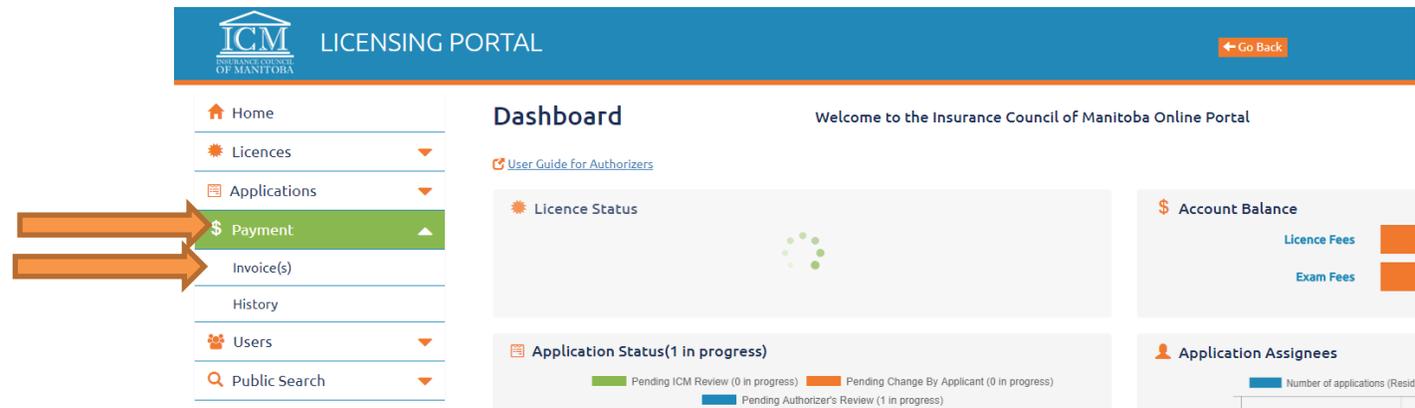
Save

Step 3: Proceed to Organization Tab

Click on Organizations as demonstrated in sample picture below, and select the organization that you are wishing to create the invoice for:



Click on Payment and then "Invoice(s)" as demonstrated in sample picture below:



Step 4: Create New Invoice

Click on New Invoice as demonstrated in sample picture below:

The screenshot shows the ICM Licensing Portal interface. On the left is a navigation menu with items: Home, Licences, Applications, Payment, Users, and Public Search. The 'Licences' item is highlighted with an orange arrow pointing to the 'New Invoice' button in the 'Current Invoices' section. Below the button, there is a 'Show 10 entries' dropdown and a table header with columns 'Invoice #' and 'Type'. The table currently shows 'Showing 0 to 0 of 0 entries'.

Select “Renewal” or “Amendment” as demonstrated in sample picture below (“Renewal” would be selected for payment of Licence Renewals; “Amendment” would be selected for payment of licence amendments”):

The screenshot shows the 'Create Invoice' page in the ICM Licensing Portal. The 'Type' dropdown menu is open, showing 'Amendment' and 'Renewal' options. An orange arrow points to the 'Amendment' option. Below the dropdown, the 'Total Amount' is \$0.00. There is a search bar and a table with columns: Licensee, Licence Number, Licence Class, and Fee. The table lists four licensees: Jon Snow, Rob Stark, Ned Stark, and Lady Stark, each with a fee of \$70.00.

| Licensee | Licence Number | Licence Class | Fee |
|-------------------------------------|---------------------|----------------|----------|
| <input type="checkbox"/> Jon Snow | F-60000-555555-2016 | AGENT/BROKER 1 | \$ 70.00 |
| <input type="checkbox"/> Rob Stark | G-61000-555555-2016 | AGENT/BROKER 2 | \$ 70.00 |
| <input type="checkbox"/> Ned Stark | K-62000-555555-2016 | AGENT/BROKER 3 | \$ 70.00 |
| <input type="checkbox"/> Lady Stark | J-63000-555555-2016 | AGENT/BROKER 3 | \$ 70.00 |

Check off all licensees that you are wishing to prepay, and watch the “Total Amount” change to total the sum of the fees included as demonstrated in sample picture below.

The screenshot shows the 'Create Invoice' interface in the ICM Licensing Portal. The 'Type' dropdown is set to 'Renewal', and the 'Total Amount' is \$740.00. The table below lists the licensees and their fees:

| Licensee | License Number | License Class | Fee |
|--|---------------------|----------------|-----------|
| <input checked="" type="checkbox"/> Jon Snow | F-60000-555555-2016 | AGENT/BROKER 1 | \$ 185.00 |
| <input checked="" type="checkbox"/> Rob Stark | G-61000-555555-2016 | AGENT/BROKER 2 | \$ 185.00 |
| <input checked="" type="checkbox"/> Ned Stark | K-62000-555555-2016 | AGENT/BROKER 3 | \$ 185.00 |
| <input checked="" type="checkbox"/> Lady Stark | J-63000-555555-2016 | AGENT/BROKER 3 | \$ 185.00 |

Two options:

1. **Licence Renewal:** As noted above, ensure you change the drop down from the default of “Amendment” to “Renewal” when creating invoices for renewal fees. Ensure all agents that you are wishing to have the renewal fees applied to are listed in this invoice with the correct annual licence fee as per Regulation [73/93](#). **\$0.00 fees are not acceptable payment for “Renewal”.**
2. **Amendment of a Licence:** The fee of \$70 is required for the amendment of the licence(s) as outlined in Regulation [73/93](#). If there is a mass amendment for the same individual who holds Life and Accident & Sickness licences, the required fee is \$70 per licence. Mass amendments typically are provided by the ICM directly to the Authorizer when requested. If you are considering amending multiple licenses, prior to doing so, please email contactus@icm.mb.ca to determine if a mass amendment would be applicable in your case.

Click “SAVE” to simply save the information **OR** click “Submit” to submit the invoice to the ICM. If the user clicks “Save” the information is not yet submitted to the ICM and can be amended before submitting it to the ICM. Once the invoice is submitted, the user can click “VIEW” to view their invoice or print it for their records.

Provide the cheque to the ICM in the full amount along with the ICM invoice number matching the invoice being submitted. **Credit card payments are currently not acceptable for invoice payment.**

Frequently Asked Questions regarding Invoices

Question #1: How do I confirm payment has been received and applied by the ICM?

The Authorizer would log in to the portal and go to the Invoices portion (following the steps as outlined in the pages above). They can “View” an Invoice that was Submitted to the ICM and see the “Status” as “Applied By ICM”. If it does not say “Applied By ICM”, the funds have not yet been applied.

Invoice 55000

Invoice #: 55000 **Type:** Renewal **Status:** Applied By ICM
Created: Apr 01, 2020 **Created By:** Rob Stark (670670)
Total Amount: \$480.00

| Licensee Number | Licensee Name | Licence Number | Licence Class | Licence Fee | Status |
|-----------------|------------------|------------------------|---------------------|-------------|----------|
| 999999 | Jon Snow | AIA-999999-876543-2020 | Accident & Sickness | \$90.00 | Not Used |
| 999999 | Jon Snow | LIA-999999-876543-2020 | Life | \$150.00 | Not Used |
| 100678 | Cersei Lannister | AIA-100678-876543-2020 | Accident & Sickness | \$90.00 | Applied |
| 100678 | Cersei Lannister | LIA-100678-876543-2020 | Life | \$150.00 | Applied |

Question #2: How do I confirm if a Licence Holder was added to the Invoice?

The Authorizer would log in to the portal and go to the Invoices portion (following the steps as outlined in the pages above). They can “View” an Invoice that was Submitted to the ICM and see who has been added.

Invoice 55000

Invoice #: 55000 **Type:** Renewal **Status:** Applied By ICM
Created: Apr 01, 2020 **Created By:** Rob Stark (670670)
Total Amount: \$480.00

| Licensee Number | Licensee Name | Licence Number | Licence Class | Licence Fee | Status |
|-----------------|------------------|------------------------|---------------------|-------------|----------|
| 999999 | Jon Snow | AIA-999999-876543-2020 | Accident & Sickness | \$90.00 | Not Used |
| 999999 | Jon Snow | LIA-999999-876543-2020 | Life | \$150.00 | Not Used |
| 100678 | Cersei Lannister | AIA-100678-876543-2020 | Accident & Sickness | \$90.00 | Applied |
| 100678 | Cersei Lannister | LIA-100678-876543-2020 | Life | \$150.00 | Applied |

Question #3: How do I confirm payment has been used by the Licence Holder?

The Authorizer would log in to the portal and go to the Invoices portion (following the steps as outlined in the pages above). They can “View” an Invoice that was Submitted to the ICM and within the columns, they can see the “Status” of **Not Used** or **Applied**. If the Status says “Applied”, this means that the fee has been used by the licence holder. If the Status says “Not Used”, this means that the fee has not been used as of yet.

Invoice 55000

Invoice #: 55000 Type: Renewal Status: Applied By ICM
Created: Apr 01, 2020 Created By: Rob Stark (670670)
Total Amount: \$480.00

| Licensee Number | Licensee Name | Licence Number | Licence Class | Licence Fee | Status |
|-----------------|------------------|------------------------|---------------------|-------------|----------|
| 999999 | Jon Snow | AIA-999999-876543-2020 | Accident & Sickness | \$90.00 | Not Used |
| 999999 | Jon Snow | LIA-999999-876543-2020 | Life | \$150.00 | Not Used |
| 100678 | Cersei Lannister | AIA-100678-876543-2020 | Accident & Sickness | \$90.00 | Applied |
| 100678 | Cersei Lannister | LIA-100678-876543-2020 | Life | \$150.00 | Applied |

Question #4: What happens if a Licence Holder leaves after the organization has paid for the Licence Renewal or Amendment on the Invoice?

Two Scenarios could occur:

- 1) A Licence Holder has NOT YET renewed their licence (or amended it):
 - a. For Renewal Fees: Money would remain on the organization account and would become viewable to the organization on June 1 (July 1 for Adjusters).
 - b. For Amendment Fees: Money would remain on the organization account and would become viewable to the organization once ICM moves the Amendment Fees to the Licence Fees account.

- 2) A Licence Holder has ALREADY renewed their licence, but the new licence year (June 1 for Agents; July 1 for Adjusters) has not yet begun:
 - a. ICM would cancel the licence at the direction of the Organization Authorizer and move the money back to the Organization account as a credit. The ICM would then advise the licence holder that they are required to pay the annual licence fee if they plan on renewing their licence with another organization.

Question #5: What happens if a Licence Holder does not renew; Where is the Money?

Un-used money automatically becomes viewable and available on June 1 (for agents) or July 1 (for adjusters) to the Organization’s Authorizer. At this time, it would be viewable as “Licence Fees” as a credit on their account, and can then be used for any upcoming application at the discretion of the Authorizer. The “status” viewable on the invoice would read as “Cancelled” as below:

Invoice 55000

Invoice #: 55000 Type: Renewal Status: Applied By ICM
Created: Apr 01, 2020 Created By: Rob Stark (670670)
Total Amount: \$480.00

| Licensee Number | Licensee Name | Licence Number | Licence Class | Licence Fee | Status |
|-----------------|------------------|------------------------|---------------------|-------------|-----------|
| 999999 | Jon Snow | AIA-999999-876543-2020 | Accident & Sickness | \$90.00 | Not Used |
| 999999 | Jon Snow | LIA-999999-876543-2020 | Life | \$150.00 | Not Used |
| 100678 | Cersei Lannister | AIA-100678-876543-2020 | Accident & Sickness | \$90.00 | Cancelled |
| 100678 | Cersei Lannister | LIA-100678-876543-2020 | Life | \$150.00 | Cancelled |

Question #6: Why can't I see the Money on the "Licence Fees" Account during Licence Renewal?

Money paid by an Invoice payment is only viewable under the Invoice tab for the Organization’s Authorizer(s). It cannot be seen under the Transactions tab as Licence Fees until June 1/July 1. See above questions for these details.

Question #7: If the invoice is Void what happens?

Submitted Invoices that never were paid for or Applied will be void after 45-days of inactivity.

Question #8: Does the ICM contact me when the payment has been applied for the Invoice?

Reference Question #1 first for detailed information. Additionally, the ICM does not contact you or the organization when the payment has been applied. The Organization’s Authorizer(s) can log into the portal at any time to check the status of an Invoice to see if it’s been “Applied By ICM”.

Invoice 55000

Invoice #: 55000
Created: Apr 01, 2020
Total Amount: \$480.00

Type: Renewal
Created By: Rob Stark (670670)

Status: Applied By ICM

| Licensee Number | Licensee Name | Licence Number | Licence Class | Licence Fee | Status |
|-----------------|------------------|------------------------|---------------------|-------------|----------|
| 999999 | Jon Snow | AIA-999999-876543-2020 | Accident & Sickness | \$90.00 | Not Used |
| 999999 | Jon Snow | LIA-999999-876543-2020 | Life | \$150.00 | Not Used |
| 100678 | Cersei Lannister | AIA-100678-876543-2020 | Accident & Sickness | \$90.00 | Applied |
| 100678 | Cersei Lannister | LIA-100678-876543-2020 | Life | \$150.00 | Applied |