



Your web connections to I-SITE

Inside office web site Internet: <http://i-site-state.naic.org/>

Outside office web site internet: <http://i-site.naic.org/>

An online experience!

Help desk (816) 783-8500 help@naic.org

I-SITE release 11.2 has combined the Financial Company Search and the Market Firm Search links into one search option called the Company/Firm Search.

Using the Company/Firm Search

- Log-in to I-SITE**
Select *Company/Firm Search* as the login category. If you have previously saved CoCodes in your preferences, they will display first. You will have to click on the Company Search button at the top of the screen to perform a new search.
- The Business Preference field controls what you see when you click on a blue company name link from the **Company Search Results** and only the company names from the Company Search Results are affected by the Business Preference option. Company Search Results do not display if you Load Saved Cocodes from Preferences. Also, Company Search Results do not display if you perform a search that results in only one company being retrieved.
- Enter the search criteria on the **Company Search** page. Tip: You may specify additional search criteria by clicking the Show More Search Criteria link below the Company Status field.

- The Show more search criteria link at the bottom of the Company/Firm Search page will expand the search page to include more search criteria choices. The lower portion of the page has Market/licensing specific search criteria. In some cases both sections of the “Show more search criteria” page may be used together to “zero in” on companies or firms of interest. Using the top section or both sections to enter criteria will return financial data first. Specifying criteria in only the lower portion (market/licensing section) will yield market/licensing search Lookup Results.
- Clicking on the entity number in the company search results will display Market Report Info. **(See Below)**

Company Search Results					
Select companies from one of the Statement Type lists					
Property and Casualty					
Cocode	Company Name	Entity #	Group	F EIN	State
<input type="checkbox"/> 22	American Safety Cas Ins Co	3859987	1346	0	
<input type="checkbox"/> 124	American Intl Grp	338	12	0	
<input type="checkbox"/> 213	American Universal Grp	1009822	21	0	
<input type="checkbox"/> 1279	American Modern Ins Grp Inc	1010075	127	0	
<input type="checkbox"/> 3301	American Mercury Ins Grp	1010463	660	0	

Market Report Info	
Data for entity 338	
Relationships	07/05/2002
Regulatory Actions	12/17/2001
Special Activities	09/01/1995

Market Demographics

The Business Preference has to be set for Market.

- ◆ From the Company Search Results (See page 1)
- ◆ Click on the blue company name link
- ◆ This displays the Market Analysis Profile report.
- ◆ There is a link to Market Analysis Profiles link and IRIS link at the top of the Demographics page

Market Analysis Profile - Demographics

Help E-Mail

[\[Company Demographics\]](#) [\[Other Names\]](#) [\[Company Contacts\]](#) [\[All Addresses\]](#) [\[Officers\]](#) [\[Filing By State\]](#) [\[Market Analysis Profiles\]](#) [\[IRIS\]](#)

Cocode: 124 Company Name: American Intl Grp

Full Company Name: STR 300

Filing Type: Combined Business Type: Property and Casualty
 FEIN: Statement Type: Property and Casualty
 Top 5 Premium States: Company Status: Active - No regulatory action in process

Regulatory Actions: 5 Company Type: COMBINED
 Confirmed Complaints: N/A Group: 12 - AMERICAN INTRNL GRP
 Total Complaints: N/A State of Domicile:
 Special Activities: 2 Country of Domicile: U.S.A

To Search by Individual

Market Individual Searches are available from the categories page and the Log-In category page.

- ◆ On the categories page click on Market Individual Search.
- ◆ This will open the Market Individual Search screen. You will only need to type in criteria and click on one of the GO buttons.
- ◆ This will return the lookup results. From there you can click on any report.

Note: You can search by First, Last, SSN or NPN. When searching by license number you must have a license state.

Multiple reports will display when more than one company is highlighted in the company section at the left side of the display. Clicking Complaints here will yield 4 sets of complaint reports .

Tips and Tricks

- ➔ On the "Market Firm Search Page" you may change how many companies display in the lookup results by using the "Display Search Results" dropdown from 5 to 250.
- ➔ Clicking the "Search Hints" link on the "Market Firm Search" screen page will help you if you are having trouble finding a company.
- ➔ You may sort and display search results by firm name, FEIN, or NAIC company code.
- ➔ When saving Market Conduct reports, use the "Save As" from the browser's "File" drop down menu and include the proper extension with your filename. The following market analysis summary reports:

- ➔ CDS Summary Index Report
- ➔ ETS Summary Report
- ➔ RIRS Summary-Firms and Individuals

can now be viewed and/or saved in Excel format (as well as in HTML or TXT format). An "EXCEL REPORT" button is now available on the search criteria page for each report.

- ➔ When printing reports, use the browser's File/Print.
- ➔ A State must be included when entering a City in the Market Individual Search and the Market Firm Search.
- ➔ Use commas to separate multiple entity searches
- ➔ When search for a company or individual: if

- only one name is specified, then the complete name is not necessary; if multiple names are specified, then the names must match exactly. Ex. John for Johnson for one or Smith, Jones for multiple names.
- ➔ Click the First, Last, Next (#) and Back (#) buttons to display results on the Market Firm/Market Individual Lookup Results page.
- ➔ Market Firm Search is available from the categories page