PIDM

Perbadanan Insurans Deposit Malaysia
Protecting Your Insurance And Deposits In Malaysia

GUIDE TO USING THE PIDM INDUSTRY PORTAL ("MI USER GUIDE") SYSTEM ACCESS & MI USER MAINTENANCE

ISSUE DATE : 31 MARCH 2023

Ref No	PIDM/UG1-A3/2023 (IPS-M)	Version No	6.0
Initial Issued Date	14 February 2019	Revised On	31 March 2023
TITLE	Guide to Using the PIDM Industry Portal ("MI User Guide") System Access & MI User Maintenance		

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SECTION 1:   INTRODUCTION

1.1   Perbadanan Insurans Deposit Malaysia ("PIDM") Industry Portal provides member institutions ("MIs") with a more secure and efficient platform for online regulatory submissions of confidential information to PIDM as well as reduces the administrative burden to MIs. It provides a secure platform for the transmission of data and documents in large volumes from MIs to PIDM.

1.2   The purpose of this user manual is to provide a step-by-step guide to assist the MIs in using the PIDM Industry Portal for the purpose of regulatory submission to PIDM.

1.3   Please note that the screenshots provided in this user manual are for illustration purposes only.

1.4   A reference to a statute or other law includes regulations and other instruments under it and consolidations, amendments, re-enactments or replacements of any of them.

1.5   This user manual shall come into effect on 24 November 2022 and supersede the *Guide to Using the PIDM Industry Portal ("MI User Guide") System Access & MI User Maintenance* dated 31 January 2022. A summary of changes made are as follows:

(a)   Updated PIDM Industry Portal and PIDM eBox IP Address
(b)   Updated supported internet browser from Internet Explorer to Microsoft Edge

1.6   All enquiries related to this user manual may be directed to:

Telephone: 1-800-88-1266
Email: industryportalinfo@pidm.gov.my

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SECTION 2: SYSTEM ACCESS PRE-REQUISITES CHECKLIST

Software and Hardware Requirements

2.1 Minimum requirements for software and hardware:

(a) Operating System is Windows 10 (version 1803)

(b) Internet browser is Microsoft Edge or Google Chrome

(c) Power settings set to performance mode / timers off / never sleep

(d) CPU Processor : Intel i5 and above

(e) RAM Size : 8GB and above

(f) Ethernet network interface card

(g) Must be connected to the internet

2.2 Internet requirements:

(a) Recommended upload speed is 10Mbps

(b) Add https://industryportal.pidm.gov.my to trusted sites

(c) Add https://ebox.pidm.gov.my to trusted sites

(d) Check outgoing fixed public internet protocol (IP) to be exactly the same as you have provided to PIDM for whitelisting purposes

2.3 Data:

(a) Check internal compliance policies to ensure that the data transmission does not violate any Data Leak Protection policies you may have within your institution

(b) Check that https://industryportal.pidm.gov.my and https://ebox.pidm.gov.my are not blocked by your institution's antivirus program

2.4 Firewall:

(a) Windows firewall allows https://industryportal.pidm.gov.my and https://ebox.pidm.gov.my on port 443

(b)   Windows firewall allows IP address 202.184.93.204 and 202.188.103.71 on port 443

(c)   MI's internal and perimeter firewall allows PIDM's uniform resource locator (URL) and IP address on port 443

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SECTION 3:   DEFINITIONS

3.1   For the purposes of this MI User Guide —

"**MI**" means a member institution as defined in the PIDM Act;

"**MIALO**" means any person nominated by an MI as the Member Institution Administrative Liaison Officer for the purposes of performing the roles and responsibilities in accordance with the user manual issued by PIDM for the access or use of the PIDM Industry Portal and the PIDM e-Box as the MIALO;

"**MIPLO**" means any person nominated by an MI as the Member Institution Primary Liaison Officer for the purposes of performing the roles and responsibilities in accordance with the user manual issued by PIDM for the access or use of the PIDM Industry Portal and the PIDM e-Box as the MIPLO;

"**MIOfficer**" means any person nominated by an MI as the Member Institution Officer for the purposes of performing the roles and responsibilities in accordance with the user manual issued by PIDM for the access or use of the PIDM Industry Portal and the PIDM e-Box as the MIOfficer;

"**PIDM Act**" means the Malaysia Deposit Insurance Corporation Act 2011;

"**PIDM Industry Portal**" means PIDM's online portal that enables submissions of information and documents (including any letter, report, form, returns, brochure, term sheet, contract terms and conditions and action plan) by the MIs to PIDM, as required by PIDM from time to time;

"**PIDM e-Box**" means the secured channel that is integrated to the PIDM Industry Portal and uses a 2-tier authentication for the transmission of large and confidential data from the MIs to PIDM;

"**PIDM**" means Perbadanan Insurans Deposit Malaysia; and

"**User**" means any person nominated by an MI to access or use the PIDM Industry Portal or the PIDM e-Box, including the MIALO.

3.2 [Update] Notice for Change in Terminology:

Existing terms reflected in this document	Updated terms reflected in the PIDM Industry Portal
MI Users	MI Users / Others
Member Institution	Member Institution / Others
MI	MI / Others
MI Officer	MI Officer / Others

Please note that there is no implication on the function and usage of the PIDM Industry Portal resulting from the update above.

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SECTION 4:   ROLES AND RESPONSIBILITIES

	Role		Responsibilities
1.	MIALO	a.	**Manages the access and privileges of users within the MI** (i.e. MIPLO and MIOfficer), as determined by the MI's internal governance framework (e.g. creating new users and granting permissions, deactivating users and updating user profiles).
		b.	– Ensures IT requirements of the MI facilitate the use of the PIDM Industry Portal; – Provides technical support to users within the MI; and – Engages the PIDM IT team on technical aspects of the Industry Portal.
		c.	Recommended to be from the IT department.
2.	MIPLO	a.	**Governs the overall engagements between the MI and PIDM** as the central point of contact. Monitors, coordinates and communicates with PIDM on matters relating to the PIDM Industry Portal.
		b.	Provides oversight and collaborates with the relevant person(s) within the MI to ensure: – Complete and timely regulatory submissions and reporting to PIDM, in accordance with the relevant subsidiary legislation issued by PIDM. – The MI Profile on the PIDM Industry Portal remains current.
		c.	MIPLO can also performs the responsibilities of the MIOfficer.
3.	MIOfficer	a.	**Conducts the operational tasks relating to regulatory submissions** – Makes complete and timely regulatory submissions and reporting to PIDM in accordance with the relevant subsidiary legislation issued by PIDM. – Updates the MI's profile on the PIDM Industry Portal to ensure it remains current.

Role	Responsibilities
	− Acts as the liaison officer pertaining to all matters relating to the submissions for the Differential Premium System, Differential Levy System, Differential Levy System for Takaful, Return on Total Insured Deposits, Deposit Information Systems and Submission, Return on Calculation of Levies for Takaful and Insurance Businesses, Deposit Product Information (via the Electronic Deposit Product Registration) and Product Information for Insurer Member.

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SECTION 5: FIRST TIME LOG IN

5.1   **Step 1:** Upon receipt of a welcome email from the PIDM Industry Portal's administrator, click on the hyperlink "**here**" in the email to be directed to the PIDM Industry Portal login page.

Hyperlink to PIDM Industry Portal login page
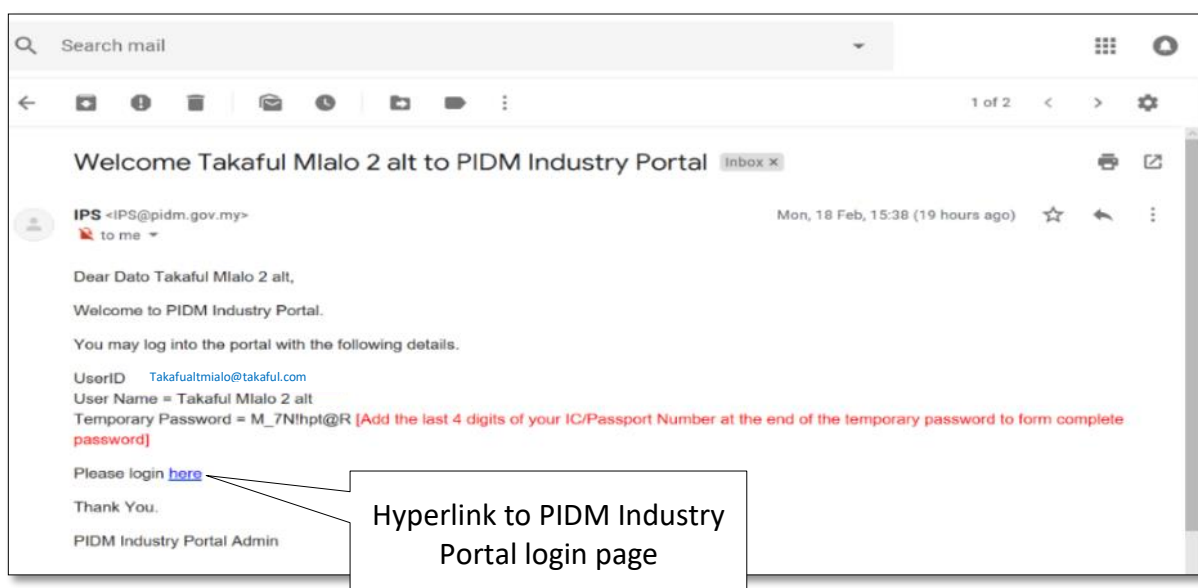
Step 2: At the login page, insert the User ID and Temporary Password provided in the welcome email. Include the last four (4) digits of the user's NRIC / passport number at the end of the Temporary Password.

Insert the User ID and Temporary Password with the last 4 digits of the NRIC / passport number

Step 3: Click on the "I'm not a robot" checkbox for second-tier verification. Select the correct image, as prompted.
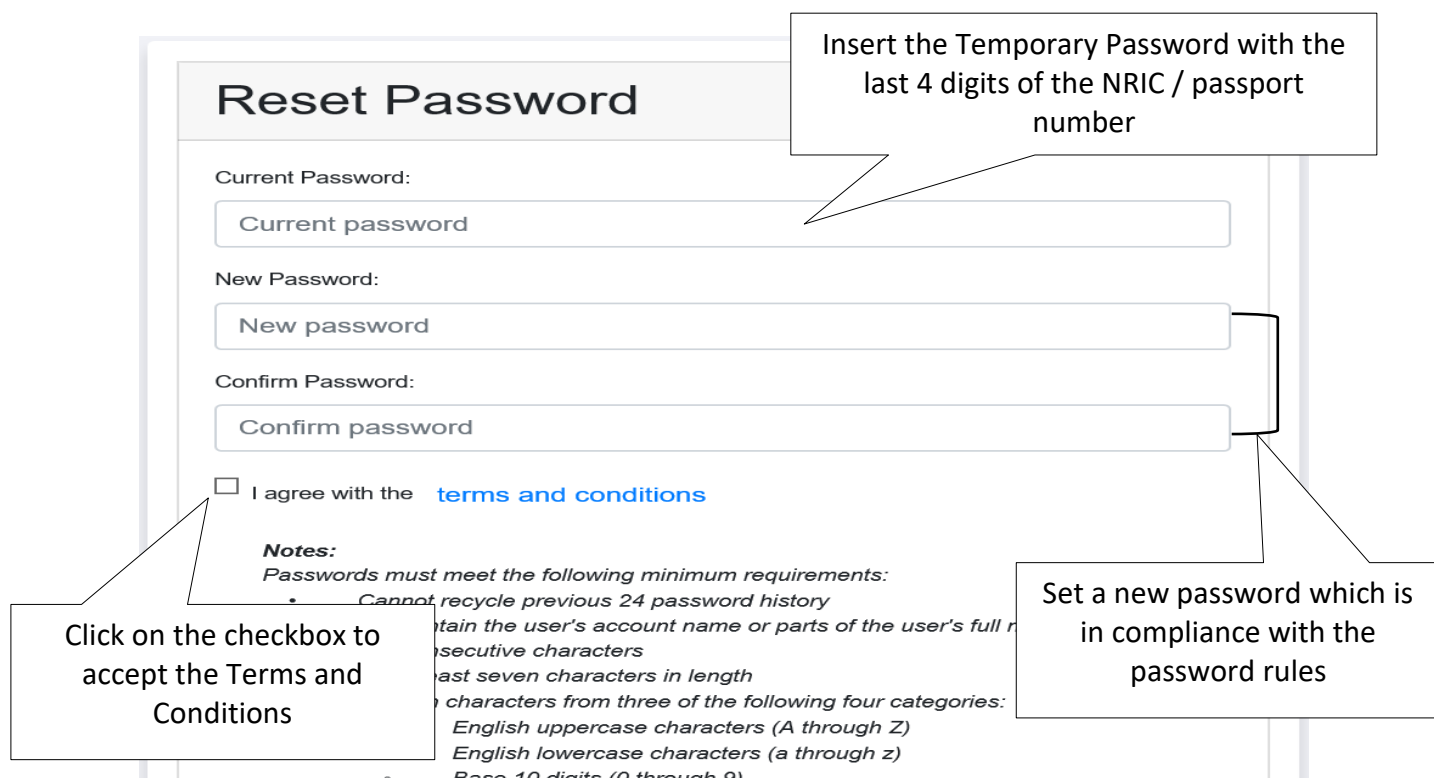
Step 4: Upon successful verification, click on the "Sign In" button.

Step 5: Upon successful sign in, user will be required to reset the Temporary Password. Keep in mind the password rules, as stated under "Notes", while setting the new password. Click on the checkbox to accept the "Terms and Conditions".

Step 6: An alert will appear on the screen confirming the password change. Upon clicking the "Ok" button, user will be redirected to the login page. User is required to use this new password moving forward.

Step 7: At the login page, insert the User ID and new password. Click on the "I'm not a robot" checkbox for second-tier verification. Select the correct image, as prompted.

Step 8: Upon successful verification, click on the "Sign In" button. In the event the user is representing more than one (1) MI, the user will be required to select the applicable MI, from the message box, that the user is acting on behalf of at that given time.

Step 9: Upon successful signing in and selection of MI, if applicable, the user will be directed to a personal Dashboard.

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SECTION 6:   MI USER MAINTENANCE
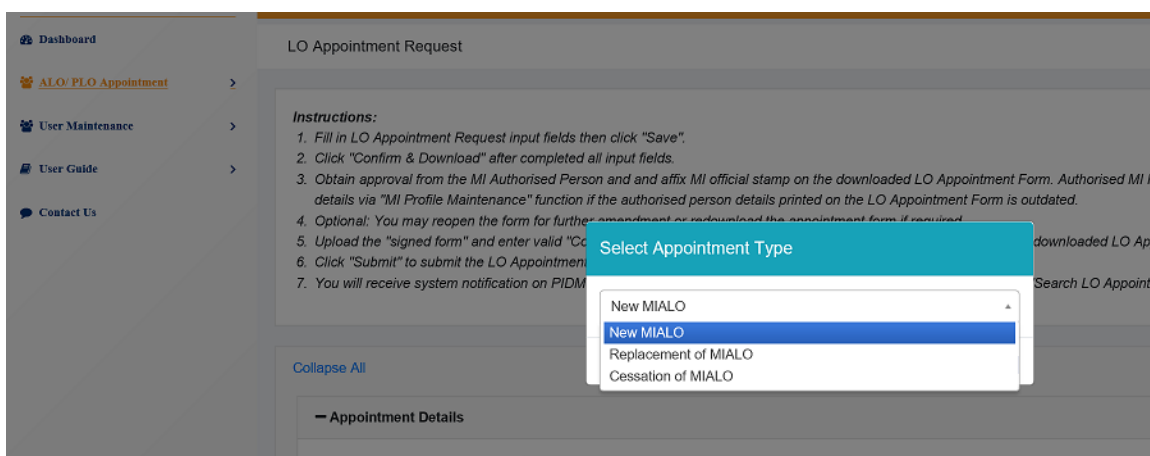
6.1   Create New MIALO & MIPLO

Step 1: To create a new MIALO or MIPLO appointment request, go to "ALO/ PLO Appointment" menu. Then select "MIALO Appointment" or "MIPLO Appointment".

The screen will prompt as below. Select "New MIALO" or "New MIPLO".

System will perform MIALO/MIPLO headcount threshold validation. If the current MI's headcount had reached the maximum number of MIALO/MIPLO, an error message will appear. You will have to create a replacement of MIALO/MIPLO instead (please refer to Section 6.2).

Step 2: User to fill in the form and save.

Please follow the instructions above the form.

Instruction no. 1: Fill in LO Appointment Request input fields then click "Save".

LO Appointment Request

Instructions:
1. Fill in LO Appointment Request input fields then click "Save".
2. Click "Confirm & Download" after completed all input fields.
3. Obtain approval from the MI Authorised Person and and affix MI official stamp on the downloaded LO Appointment Form. Authorised MI PLO/ MI Officer may edit the MI Authorised Person details via "MI Profile Maintenance" function if the authorised person details printed on the LO Appointment Form is outdated.
4. Optional: You may reopen the form for further amendment or redownload the appointment form if required.
5. Upload the "signed form" and enter valid "Confirmation Code". Confirmation code is printed on top right section of the downloaded LO Appointment Form.
6. Click "Submit" to submit the LO Appointment Request for PIDM processing.
7. You will receive system notification on PIDM processing status. Alternatively, you may monitor the request status via "Search LO Appointment" function.

Collapse All

+ Appointment Details

+ LO Personal Details

Save   Confirm & Download   Cancel

LO Appointment Request

New MIALO appointment saved successfully.

Ok

System will assign a unique reference number to the appointment request upon the first save, and the form status is "Draft".
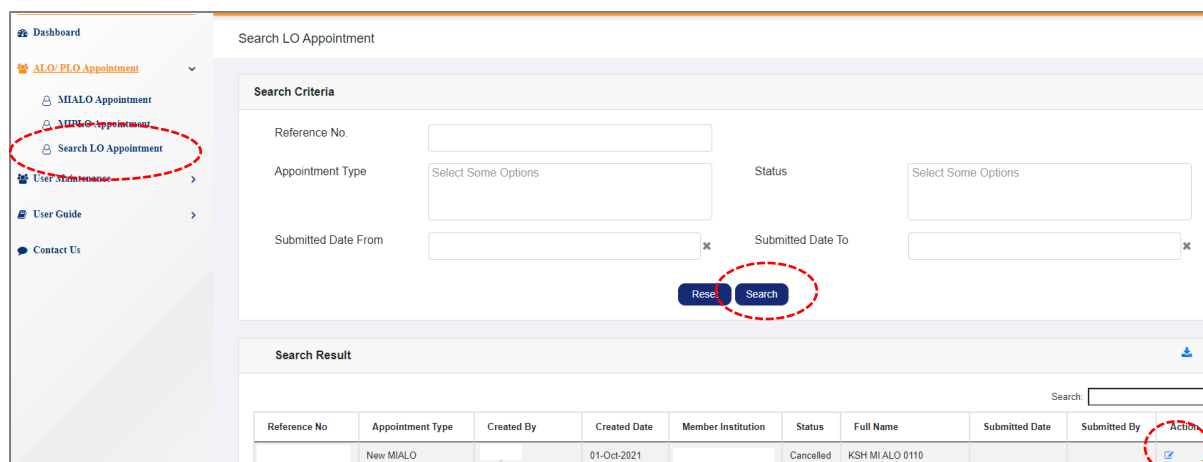
User may locate the draft form using the "Search LO Appointment" menu.

- User can edit the saved draft any time and resave, before clicking "Submit".
- To discard a draft form, click on the "Cancel" button. The form status will be updated to "Cancelled" and it is read-only.

Instruction no. 2: Click "Confirm & Download" after completed all input fields.

Postal Code *	123456	City *
State	Kuala Lumpur ✕ ▾	

Save   Confirm & Download   Cancel

LO Appointment Request

Are you sure you want to confirm this request?

No   **Yes**

LO Appointment Request

LO Appointment Request is confirmed successfully and the LO Appointment Form is downloaded.

Close

Instruction nos. 3 and 4: Obtain approval from the MI Authorised Person and affix MI official stamp on the downloaded LO Appointment Form. Authorised MI PLO/ MI Officer may edit the MI Authorised Person details via "MI Profile Maintenance" function if the authorised person details printed on the LO Appointment Form is outdated.

Optional: You may reopen the form for further amendment or redownload the appointment form if required.

Instruction no. 5: Upload the "signed and stamped form" and enter valid "Confirmation Code". Confirmation code is printed on top right section of the downloaded LO Appointment Form.

Instruction no. 6: Click "Submit" to submit the LO Appointment Request for PIDM processing.

You will receive a system notification on PIDM processing status. Alternatively, you may monitor the request status via "Search LO Appointment" function.
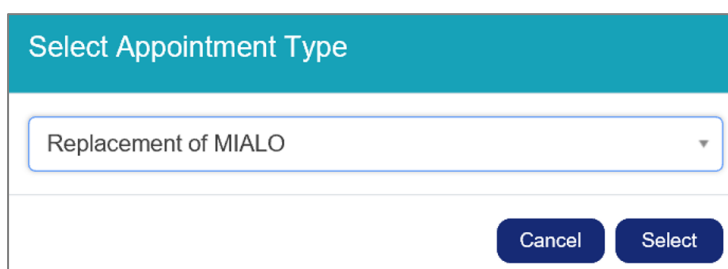
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6.2 Replacement of MIALO & MIPLO

To replace an existing MIALO or MIPLO, go to "ALO/PLO Appointment" menu. Then select "MIALO Appointment" or "MIPLO Appointment".

The screen will prompt as below. Select "Replacement of MIALO/MIPLO".

User to click on "MIALO/MIPLO To Be Replaced" to open dropdown list of active MIALO/MIPLO. Select the MIALO/MIPLO to be replaced, and update the form accordingly with the new MIALO/MIPLO details. Please refer to Section 6.1 - Step 2.

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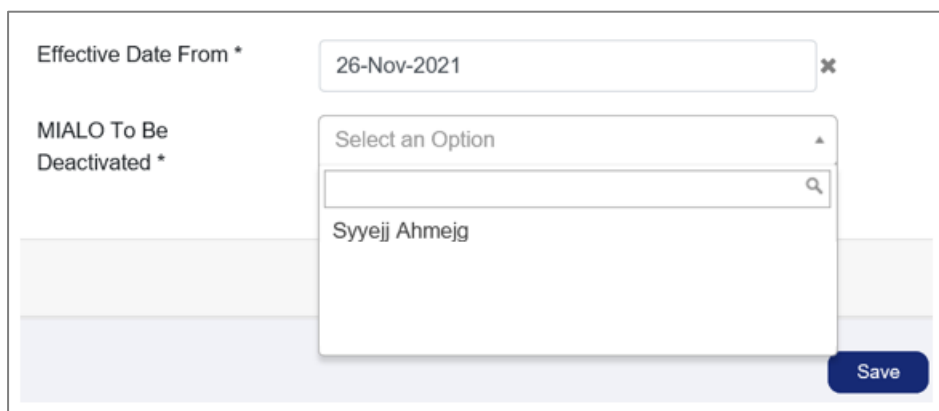
6.3   Cessation/ Deactivate MIALO & MIPLO

To deactivate an existing MIALO or MIPLO, go to "ALO/PLO Appointment" menu. Then select "MIALO Appointment" or "MIPLO Appointment".

The screen will prompt as below. Select "Cessation of MIALO/MIPLO".

User to click on "MIALO/MIPLO To Be Deactivated" to open dropdown list of active MIALO/MIPLO. Select the MIALO/MIPLO to be deactivated and click "Save". Please refer to Section 6.1 - Step 2.

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6.4   Search LO Appointment Request

User may locate the draft form using the "Search LO Appointment" menu.

- User can edit the saved draft any time and resave, before clicking "Submit".
- To discard a draft form, click on the "Cancel" button. The form status will be updated to "Cancelled" and it is read-only.
- User can search for a "Confirmed" LO Appointment Request and drill in to the request to upload signed LO Appointment Form.
- User can track submitted LO Appointment Requests status
- User can search and view historical LO Appointment Requests details

Step 1: Click "Search LO Appointment" menu.

Step 2: Define search criteria (if any), then click "Search".

Step 3: Click on the "Action" icon to drill in to the selected request for further action.

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6.5   Create New MI Officer

Step 1: To create a new MIOfficer, login as MIALO, click on "User Maintenance" menu. On the "MI Users List" page, click on the "Add User" button.

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Step 2: Input the required details in the data fields. Mandatory data fields are marked with an asterisk (*).

Step 3: Click on the hyperlink(s) provided under the "Action" column to assign the access rights (contribute or read only) for the corresponding Modules (e.g. Dashboard, Submission Management, etc.). Select the applicable "Submission Type" from the listing provided.

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Step 4: A message box shall appear upon successful user creation. Click on the "Ok" button to proceed.

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6.6   Search MI Users (MIALO, MIPLO, MIOfficer)

Step 1: Click "MI Users" sub-menu under "User Maintenance" menu.

Step 2: Define search criteria (if any), then click "Search". Uncheck "Show Active User only" checkbox to include inactive/deactivated users into the search result.

Step 3: Click on the "Action" icon to drill in to the selected user record for further action.

Step 4: You can export the search result to MS Excel format by clicking on the "Download" icon.
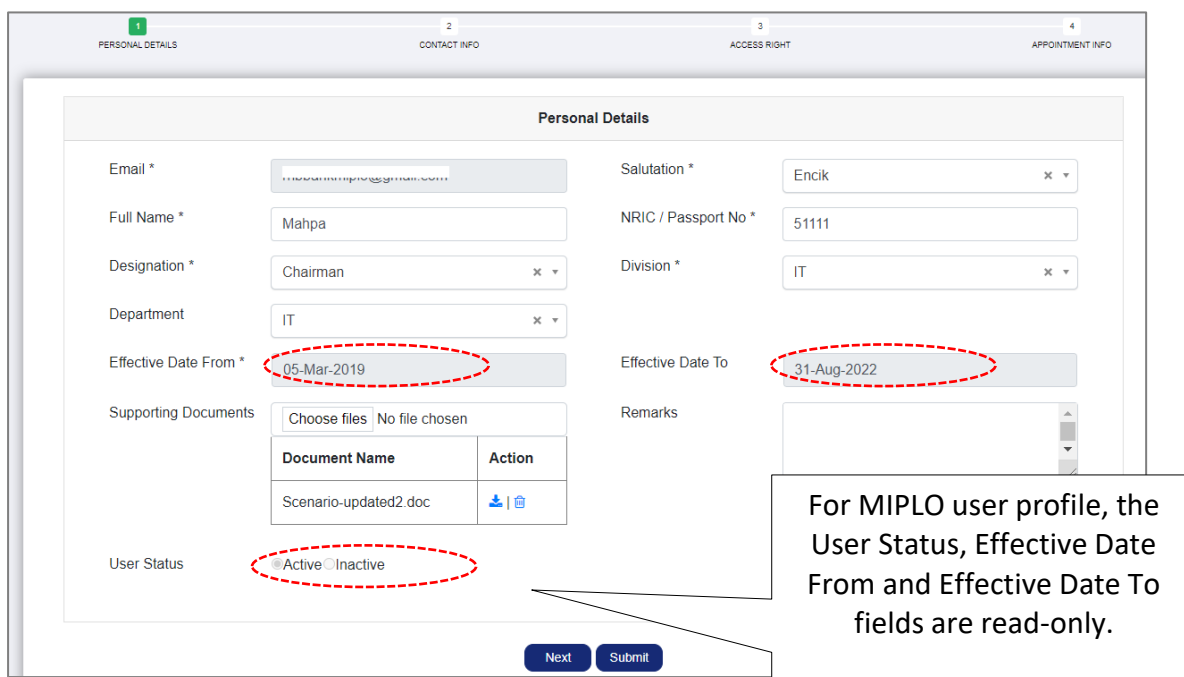
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6.7   Edit MI Users Profile & Access Right

User may search for a specific MI User record to be edited by using the "MI Users" menu. Refer to section 6.6.

- MIALO is unable to edit own/ other MIALO information. New or Replacement or Deactivation of MIALO must go through LO Appointment process. Refer to Section 6.1, 6.2 and 6.3.

- MIALO may edit MIPLO user profile and access right of a MIPLO. However, New or Replacement or Deactivation of MIPLO must go through LO Appointment process. Refer to Section 6.1, 6.2 and 6.3.

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MIALO can modify MIPLO access right in IPS.

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- MIALO may create new MI Officer (Refer to Section 6.5), edit MI Officer user profile and access right, deactivate MI Officer in IPS.

MIALO can modify MI Officer access right in IPS.

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6.8   Deactivate MI Officer

Step 1: User may search for a specific MI User record to be deactivated by using the "MI Users" menu. Refer to section 6.6.

Step 2: Update the "User Status" to Inactive, and then click "Submit". The inactive MI Officer access to IPS will be disabled. However, the deactivated user records are still searchable in IPS using Search MI Users function. Refer to section 6.6.

Set the User Status to "Inactive" and click "Submit".

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SECTION 7:   FORGOT PASSWORD

Step 1: In the event a user is unable to recall the password, user will be able to obtain a temporary password by clicking on the hyperlink "Forgot Password?"

Click on Forgot Password
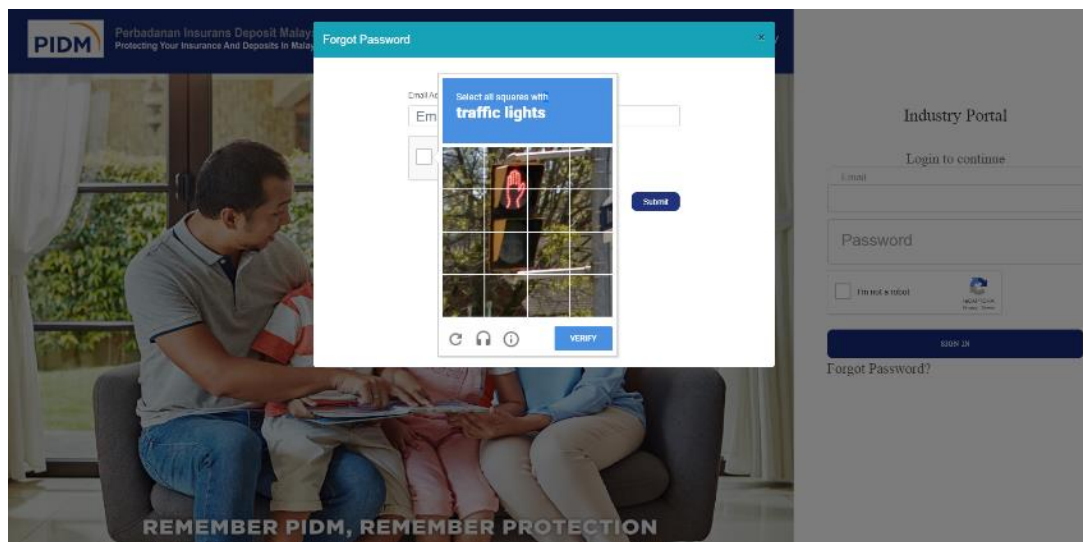
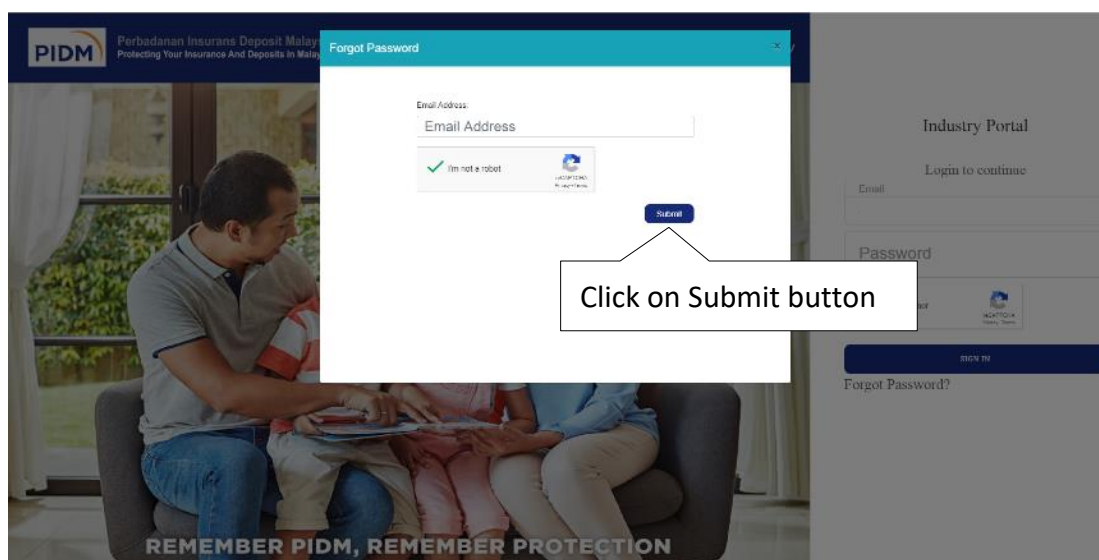**Step 2:** User to insert email address.

Step 3: Click on the "I'm not a robot" checkbox for second-tier verification. Select the correct image, as prompted.
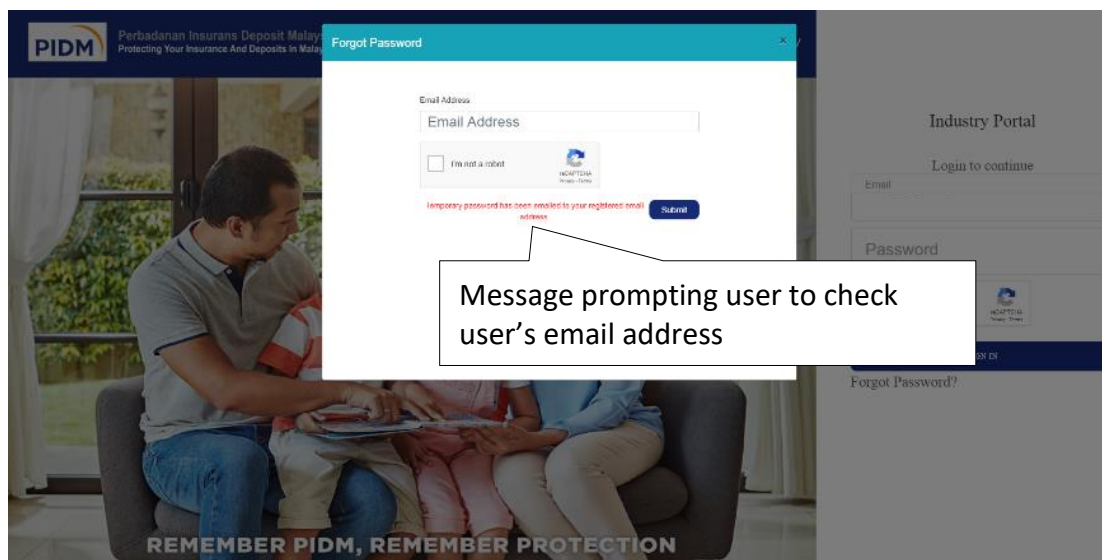

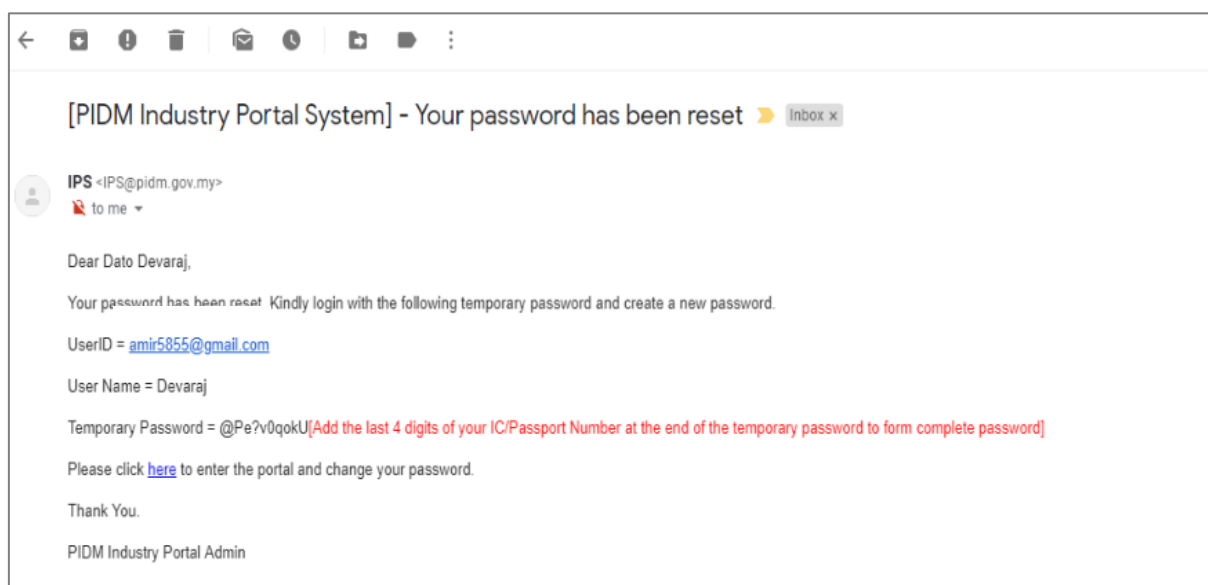**Step 4:** Click the "Submit" button to request for a temporary password.

Step 5: The PIDM Industry Portal will prompt the user to check user's email address which contains information on the temporary password.
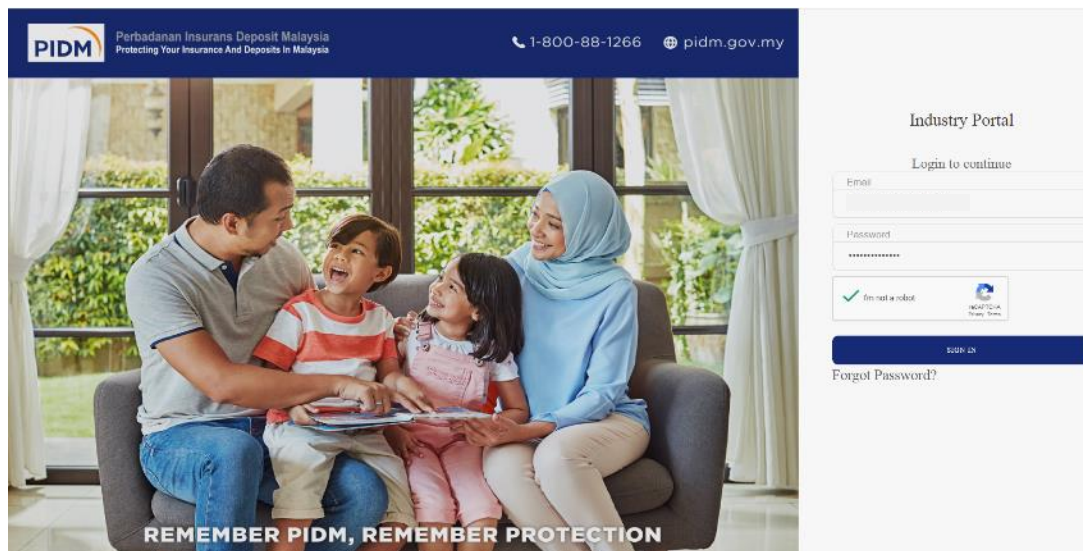

Message prompting user to check user's email address

Step 6: Email containing information on the temporary password.

[PIDM Industry Portal System] - Your password has been reset

IPS <IPS@pidm.gov.my>
to me

Dear Dato Devaraj,

Your password has been reset. Kindly login with the following temporary password and create a new password.

UserID = amir5855@gmail.com

User Name = Devaraj

Temporary Password = @Pe?v0qokU[Add the last 4 digits of your IC/Passport Number at the end of the temporary password to form complete password]

Please click here to enter the portal and change your password.

Thank You.

PIDM Industry Portal Admin

Step 7: User should log in by following the instructions provided in the email.

Step 8: The PIDM Industry Portal will prompt user to change the temporary password. Click the "Ok" button to proceed.

Click on Ok button to proceed

Perbadanan Insurans Deposit Malaysia

31 March 2023