NAVIGATE

mib

Insurer Helpdesk Quick-start guide.

Key changes when creating and managing policyholders in Navigate.

Overview

From 29 April 2024 the MIDportal was replaced with Navigate. Navigate is the MIB's new data platform and will hold data from the Motor Insurance Database (MID) now Motor Insurance Policy Data (MIPD).

When acting as a Level 2 or Level 3 Helpdesk user, you'll likely have access to Update Vehicle, File Transfer and User Admin applications.

User Admin for policyholder management has changed, to allow for a quicker and smoother set up process, you'll still have access to all the necessary tools to carry out your role. Details of the main changes are shown below.

Policyholder users will no longer have separate accounts if they have policies with more than one insurer/DA. Each insurer/DA will create and authorise access for an account with the policyholder's email address.

Insurers/DA's can remove access to a policy so the user cannot update vehicles, you can only delete the policyholder account if there is one policy for your organisation the user has access to. If the user has access to update policies for other organisations, the account cannot be deleted out of Navigate.

You'll see new icons as below to authorise changes and edit/discard changes.

Search

To locate a policyholder, you'll need to search using their forename and Insurer/DA code.

Users were previously set up in MIDportal with a User ID and User Name - the User Name will have been migrated over to Navigate automatically and now displays in the user's forename when editing the policyholder. However, within the table (see below), the user's forename and surname are merged into the 'Full Name' field.

Select/Add a Policyholder

This insurer currently has 5 Policyholders

Export Policyholder List   Add New Policyholder

Policyholder Management

Forename *	Surname	Insurer/DA Code *	
			Search

SEARCH RESULTS

Full Name	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
ADD TEST	HHHH000L1111_ph@yopmail.com	Requires Authorisation - New User	02/03/2024	✓ ✗	✏ 🗑
Jane Doe	jane.doe12@mailinator.com	Authorised	18/03/2024		✏ 🗑
John Smith	jsmith@mailinator.com	Authorised	18/03/2024		✏ 🗑
Pravvi test	admin.policy22@test.com	Authorised	12/03/2024		✏ 🗑
Pravvi test	admin.policy22222@test.com	Authorised	12/03/2024		✏ 🗑

Displaying Results 1 To 5 Of 5   ‹ 1 ›   Show: 10 Rows ⌄

The policyholder's User Name will now be their email address. Users will only have one email address to access all their policies. They will no longer have separate accounts if they have policies with more than one insurer/DA.

Create new user

When setting up a new user, you'll need to supply their Forename, Surname, Email Address and either a Policy Number or an Access Code. **Their account mustn't be created as an Organisation Name in Navigate.**

Add a new Policyholder

Back to Policyholders

Insurer/DA Code ⓘ :	999		
User Type :	Policyholder-Vehicle Update Only	Forename :	
Insurer :	999	Surname :	
Insurer Branch:		Email Address:	
DA :		Policy Number :	
DA Branch :		Access Code :	

Submit

You'll no longer need to create a password, or a passphrase for your policyholder, they will do this themselves. A Validation Code will no longer be sent to the Policyholder.

When a policyholder already exists in Navigate (as they may have been set up by another organisation), their name provided by their initial set up will be the name that will show on your policyholder's details once saved.

Additionally, if a user has already been set up by your organisation using the same email address, you'll be notified by a popup.

Edit/Manage users

When you need to edit a policyholder, simply click on the pen icon, under the column 'Action' in the table below, or click on their name.

SEARCH RESULTS

Full Name	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
Jane Doe	jane.doe12@mailinator.com	Authorised	18/03/2024		✏️ 🗑️

Displaying Results 1 To 1 Of 1   < 1 >   Show: 10 Rows ⌄

ⓘ View/Edit Policyholder   [Delete Policyholder] [Back to Policyholders]

Insurer/DA Code: 999

User Type:	Policyholder-Vehicle Update Only	Forename: Jane
Insurer:	ADAVARA	Surname: Doe
Insurer Branch:		Email Address: jane.doe12@mailinator.com
DA:		
DA Branch:		

Account Locked/Unlocked: No ▾

Jane Doe has access to 1 policies   [**Add Policy**]

Policy/Access No.	Insurer	Branch	DA	Branch	Authorisation Status	Date	Authorisation	Action
YGPC0018634	ADAVARA				Authorised	18/03/2024		✏️ 🗑️

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Edit Policyholder

Last Updated By: g	**Authorised By:** g	
Last Updated Date: 18/03/2024	**Authorised Date:** 18/03/2024	Submit

You'll not be able to amend a user's email or name once they have been created. If the email entered has changed, delete this user and create a new record. If required, a support request can be made to amend the user's name, select 'Help-Contact Support' to do this.

Account locked

If a policyholder is unable to access Navigate this could be due to a number of reasons.

One could be that they did not activate their account when they were created.

They may be locked due to inactivity, this will show in the account Locked/Unlocked section as 'System lock – Inactivity'. The helpdesk user should ensure this is marked as active/unlocked to assist in trouble shooting.

If the account shows as active but the user cannot access Navigate. They will need to raise a request to the insurer helpdesk, who should then raise a request with MIB via the contact us support to authorise MIB to activate/unlock the policyholder. An email will be sent to the policyholder or resolution advice to the insurer helpdesk.

Authorise/Decline

You'll now be able to authorise or decline work carried out by Level 3 users. AS before, all Level 2 users can authorise their own work, while Level 3 users need their work authorised by Level 2's or another Level 3 user. You can manage this from the Policyholder table. Simply select the tick or cross option under the 'Authorisation' column.

Full Name ▼	User Name	Authorisation Status ▼	Date Created / Amended	Authorisation	Action
Hira Gargiya	a12111bc12@gmail.com	Requires Authorisation - New User	26/10/2023	✓ ✗	✎ 🗑

To authorise, select the tick and confirm the pop-up notification.

Authorise - New User   ✕

This user has recently been set up by 42944, and requires authorisation before activation.

Cancel   Authorise

To decline the action, select the cross and accept the decline pop-up.

Are you sure?   ✕

Are you sure you want to decline the authorisation?

Cancel	Authorise