Your Step-By-Step Guide To Using CompliAssist™
Compliance professionals have come to rely on APCIA as a valued source of information about the ever evolving insurance laws and regulations in each state. This accurate and reliable compliance information is now available on the APCIA website under the CompliAssist™ name.

**HOW DO I USE COMPLIASSIST™?**

CompliAssist™ is available through the APCIA website at [apci.org](http://apci.org). You will need to log in to access CompliAssist™ information products.
Once you have logged in you will be able to access all of the CompliAssist™ information products.

Use the submenus to select the individual guides and compilations.
HOW DO I ACCESS COMPLIASSIST™ CHARTS?

CompliAssist™ charts—over 90, all covering topics from agent licensing to cancellation/nonrenewal to statutes of limitations to workers compensation—are available in the CompliAssist™ drop down menu.

CompliAssist™ charts offer a number of enhanced features that APCIA members like you have requested. These enhancements include:

- More up-to-date information for all 50 states
- Easy reference for when a chart was last updated
- Greater search capabilities, including the ability to call up the most recent changes
- The flexibility of custom data cuts in Excel or print-friendly formats
- The ability to view information for a single state, multiple states or all 50 states
WHAT ARE MY SEARCH OPTIONS FOR CHARTS?

Using the drop down selections in the chart interface, you can search CompliAssist™ charts by topic area (Category) or chart title (Chart). You can further narrow your search by specifying a specific state or states, or just search for information on all 50 states by not using the state drop down filter. You can select multiple states by clicking on an individual state and then returning to the drop down list to select additional states.
HOW DO I CREATE CUSTOM REPORTS USING COMPLIASSIST™ CHARTS?

Once you have selected the information you wish to see, you click on the Search button to retrieve your selected information. You now have a custom report that can be exported.
WHAT FORMAT OPTIONS DO I HAVE FOR REPORTS?

Once you’ve clicked on the Search button and the information is displayed on the screen, you can select either “Print Version”, “Export”, or “View As PDF”. The print version appears within your computer screen, allowing the user to scroll through the results online. The Export button exports the information into an Excel file. Exporting to Excel may be useful if you are interested in using the filter function to focus on one topic covered by a chart. The “View As PDF” allows the user to create a PDF document that can be saved, printed on paper, or uploaded onto an Intranet website for employee use.
HOW CAN I REVIEW RECENT CHANGES TO THE COMPLIASSIST™ CHARTS?

Click on “Most Recent Changes”.

You can search for most recent changes in the same manner as you search CompliaAssist™ charts, by topic area (Category), chart title (Chart), state (State(s)), or text (Text Search). You can also search for changes by date. Once you click Search, you’ll see the most recent changes to the relevant CompliaAssist™ chart, along with an explanation for the change.
HOW CAN I RECEIVE RECENT CHANGES TO THE COMPLIASSIST™ CHARTS?

Click on “Notify me of Changes”.

You can select any or all of the CompliAssist charts to receive emailed updates. Members who subscribe to a chart will receive an email alert the business day after a CompliAssist chart has been updated. Once you have made your selections, make sure you click on “Save”.

HOW CAN I RECEIVE UPDATES ON COMPLIASSIST™ WHEN NEW CHARTS ARE ADDED?

Members can subscribe to the CompliAssist Bulletin to receive updates on when new charts are added or other changes to CompliAssist™ are made. Members can subscribe to the CompliAssist Bulletin in General Publications on the Subscriptions page.

We're confident that CompliAssist™ will be your one resource for all of your compliance information needs. Best of all, CompliAssist™ is available at no additional charge. It's just another benefit of APCIA membership.

To try CompliAssist™ for yourself, go to apci.org, click on the “CompliAssist™” drop down in the menu at the top of the home page and select from the menu of CompliAssist™ products.

It’s fast. It’s easy. It’s free. It’s CompliAssist™.