



Help Guide to
Insurer SLIP

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WELCOME TO SLIP!

The Surplus Lines Information Portal (SLIP) has been created by the FLSO to facilitate online interaction between the surplus lines insurers doing business in Florida and the FLSO. SLIP provides a mechanism for surplus lines insurers to electronically submit policy information to the service office.

LOGGING INTO SLIP

This is the login screen for SLIP users. In order to gain access to your SLIP account, you must enter your username and password. Your username and password for SLIP are established by FLSO and are unique for each user.

If you do not have a SLIP username and password, please contact our office at 1-800-562-4496 or via email at insurer.services@fslso.com. In the email, please include your name, your company name, NAIC #, address, city, state, zip, phone number, fax number and email address. If you make policy submissions for more than one company, you must have a set of credentials for each company.

Once you have entered your username and password, click **LOGIN**.

! If you encounter problems logging into SLIP, you should verify that the spelling of both the username and the password are correct and that the caps lock feature on your keyboard is not on.

If you have forgotten your password, check the box next to **Forgot Password?**.

The following screen will appear.

Enter your email address and click **Submit**. A new password will be sent to the email address entered.

SLIP MAIN PAGE

Once you have successfully logged into SLIP, the Main screen will appear. All areas of SLIP can be accessed from this page by clicking the tabs on the menu bar.

Home on the Menu Bar will direct you to the Main screen.

Search Policy will direct you to the screen that will allow you to search for policies already submitted to FLSO.

New Policy will direct you to the screen that will allow you to input new policies and transactions.

Reports will direct you to a screen where you can run various reports, file your No Business letter and update your Catastrophe Contact Information.

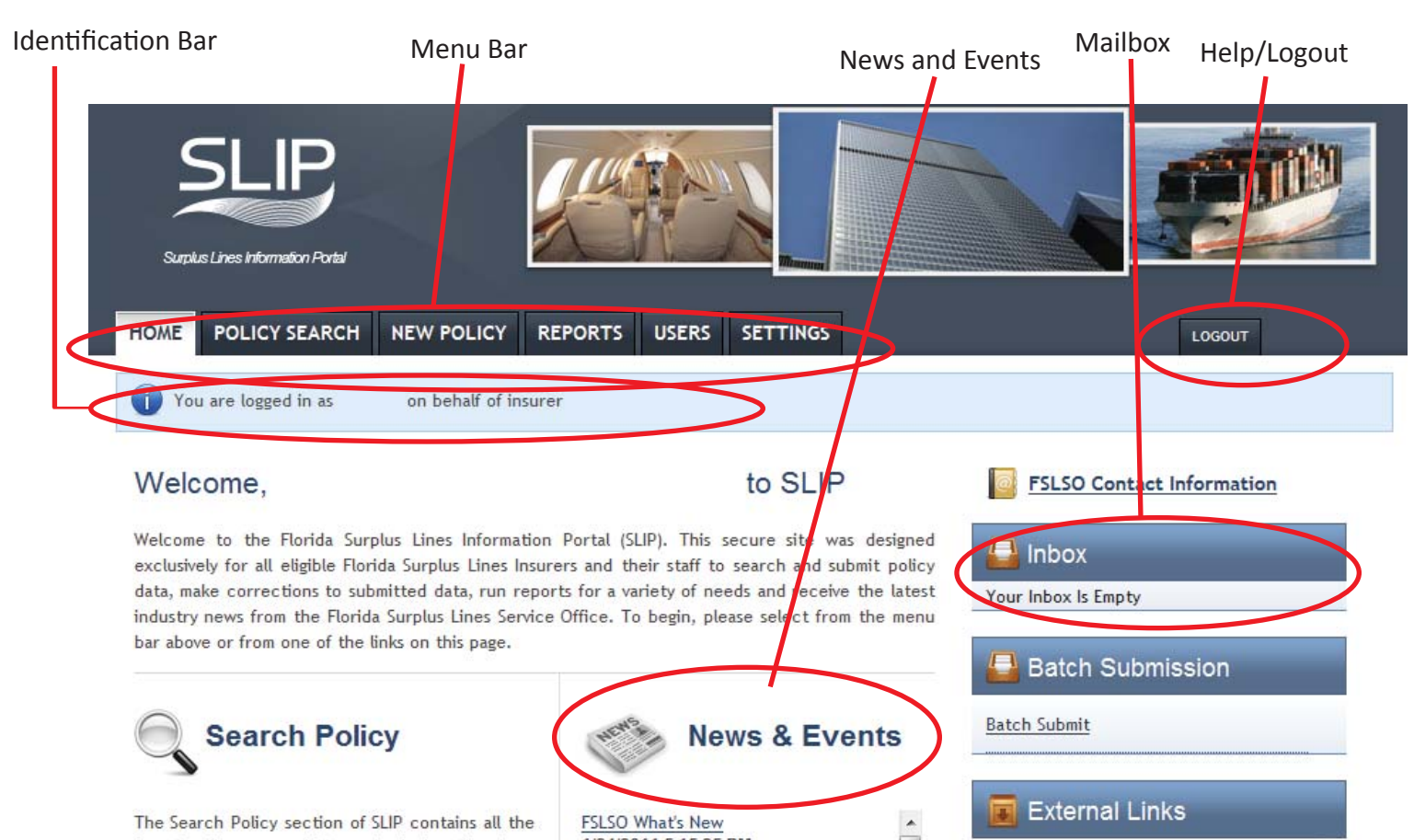
The **Users** link directs you to the screen that will allow you to edit your information.

Settings will direct you to the Setting screen, which will allow you to assign applicable agencies and agents.

The blue Identification Bar will list the insurance company attached to the username and password used. **If you make policy submissions for more than one company, you must have a set of credentials for each company.**

The SLIP inbox houses communications from FLSO and, while set up to look like an email program, you cannot reply to the messages that appear here. To access your inbox, click the phrase, "You have new messages."

Now that you have an overview of the Main Page, let's begin setting up your SLIP account by clicking on **Settings** in the Menu Bar.



SETTINGS SCREEN

The Settings Screen is used to define data specific to SLIP users, such as Agent and Agency Assignment.

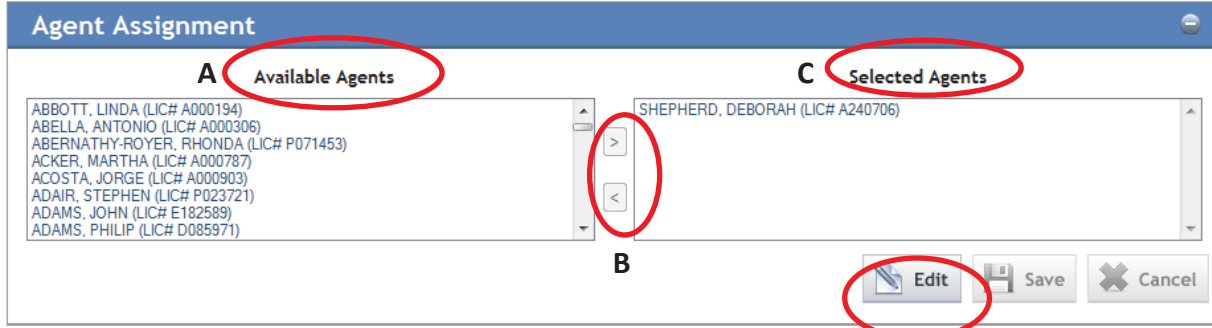
The Settings Screen must be complete before attempting to submit policy data. Let's begin by selecting Agents.

SELECTING AGENTS

To select or deselect agents:

- 1) Click the **Edit** button.
- 2) Select the appropriate agents from the **Available Agents** box (A).
- 3) Using the top arrow (B), move the agent that is highlighted to the **Selected Agents** box (C).
- 4) Continue to follow those steps for selecting all of the agents that you work with.
- 5) Once you have made your selections, click the Save button.
- 6) To deselect an agent, use the bottom arrow to move an agent from the **Selected Agents** box to the **Available Agents** box.

SLIP >> Settings



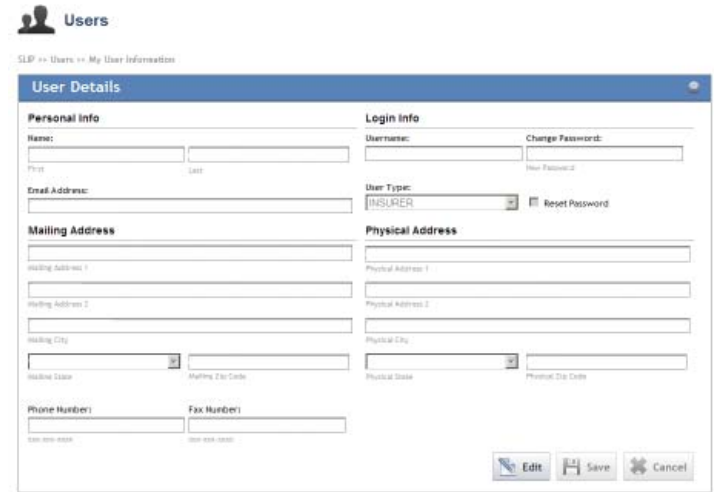
SELECTING YOUR AGENCY ASSIGNMENT

Below the Agent Assignment box, you will see the Agency Assignment panel. You will move agencies from Available to Selected in the same way you did with the Agents above. Once you have made your selections, click the Save button.

USERS SCREEN

In this section, you can edit your user information and reset your password. If you would like other members of your office to have access to policy data via SLIP, they must obtain their own username and password.

To change any of the User Details, click **Edit**. Enter any new information you would like to update, including a new password if so desired. Once you have made all the desired changes, click **Save**.



POLICY SUBMISSIONS

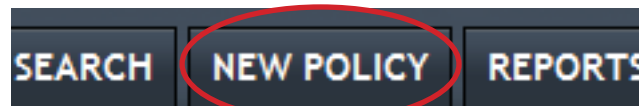
Now that you have your Settings and Users set up, let's take a look at how you will submit a new policy. For the purposes of this manual, the term "new

policy" applies to a policy number that has never been submitted.

Entering a new policy is a two part

process. First, you will enter the policy information and then add transaction information.

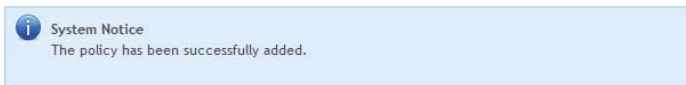
To begin, click **New Policy** on the menu bar.



The policy detail screen will appear as shown below.

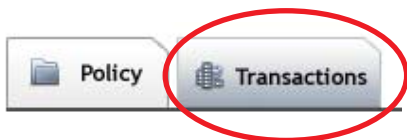
Under the Policy tab, enter the required policy data including policy number, insured name, effective date, and expiration date. You will also select an agency or agent from the drop down list or check the box for independently procured coverage. The agent and agency drop down list is automatically populated with the selections made in the **Settings** screen.

After you have input all of your information, select **Save**. The policy details have now been saved and you will be provided a System Notice like the one below:



All of the information under this tab is editable. You may do so by clicking **Edit**. After you have made your corrections, click **Save**.

From here, you will need to input transaction information. To begin, click the Transaction tab.



Under the transaction tab, you will be able to add transaction information to the new policy.

Enter the effective date and premium amount. Review the data for accuracy. If the data entered is correct, click **Save**.

! Please be sure that you do **NOT** include commas or dollars signs in the premium field.

The information submitted will then appear highlighted in the Transaction Grid above the input fields, with a confirmation number.

Policy Details					
Policy	Transactions				
	<table border="1"> <thead> <tr> <th>Confirmation Number</th> <th>Effective Date</th> </tr> </thead> <tbody> <tr> <td>043814575523</td> <td>5/4/2009</td> </tr> </tbody> </table>	Confirmation Number	Effective Date	043814575523	5/4/2009
Confirmation Number	Effective Date				
043814575523	5/4/2009				

POLICY SEARCH

To find a policy that has already been submitted, click **Search Policy** on the menu bar. The following screen will appear.

A policy search can be performed by entering a policy number, the insured's name or by entering data in any of the other fields in the search criteria frame and then clicking **Search**.

If policies exist that match the entered criteria, the search results grid will appear listing those policies. Select the desired policy from the grid by clicking the icon located to the left of the policy number. The policy details will display below the grid and contain general policy data

Policy Search	
Search Criteria	
Search Results	
Policy Number	
ABC85475	
JB4119	

including policy number, insured name, expiration date and effective date. From here you will be able to edit any general policy information as well as add new transaction details.

To move to the Transaction screen, ensure that the desired policy is highlighted and click on the **Transaction** tab.



SUBMITTING A BACKOUT

While SLIP allows the user to edit policy level information, including policy number, expiration date and insured name, you will need to submit a “backout” when making corrections to transaction level data.

Submitting a backout is simple. From the transaction tab, highlight the incorrect transaction by clicking the icon next to the policy number in the Transaction Grid. Then, click **Backout** located in the bottom right corner.



The system will then provide you with the following pop-up window. Click **OK**.



After selecting **OK**, you will need to click **Save** in order to complete the backout. You may then click **New** to enter the correct information.

REPORTS

Aside from submitting policies, SLIP also has another useful feature to help manage your filings: Reports.

The Reports feature in SLIP provides numerous informational reports that will help you to better manage your

files and your compliance standards.

To access all available reports, click **Reports** on the menu bar.

There are several reports available to you through SLIP, including:

Activity Summary: This report provides an aggregate count of the number of submissions, policies, transactions and premium reports for the selected date range.

Late Submission Report: This reports provides policy level details of any policies submitted after the filing deadline.

Activity Detail Report: This report provides policy level data of submissions based on the criteria selected.

Catastrophe Information: This reports allows you to file and maintain your catastrophe contact information with FLSO online.

File No Business: This report is used to submit to FLSO that no business was written in the state of Florida during the reporting period.

Insurer Report Card: This report allows you to review the degree to which your filing requirements are in compliance. It also provides an industry average.

Select the type of report from the drop down menu. Then, input any required date information. Click Print. Please note that this will NOT print the report but will

