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2008 OIR Filing and Compliance Symposium

# I-File Presentation

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# OUTLINE

- What is I-File?
- User's Manual
- Recent (July 2007) I-File changes
- Common Issues
- Questions / Comments

# What is I-File?

What would you like to do?

OFFICE OF INSURANCE REGULATION



FAIR. FAST. PROFESSIONAL.



**IMPORTANT NOTICES**

- OIR 2008 Filing and Compliance Symposium
- P&C RCS Training and User Manual

**Common Tasks**

- Set up an account
- Filing workbench
- What is the Industry Portal

Welcome to the Industry Portal

Welcome to the Florida Office of Insurance Regulation Industry Portal. The Industry Portal is a convenient, single point of entry to access the Filing Assembly and Submission System, online Rate Collection Systems, Quarterly Submission Reports, and other related content.

Pick a Category

- [Form & Rate Filing Assembly and Submission](#)
- [Regulatory Electronic Filing System \(REFS - Financial Related Filings\)](#)
- [Data Reporting](#)
- [QUASR \(click here for FAQ's and Manual\)](#)
- [Office of Insurance Regulation Website](#)
- [Professional Liability Claims](#)
- [Workers Compensation Data Collection](#)
- [Update Contact Information](#)
- [iApply -- Online Company Admissions](#)



# Where do I find the User's Manual?

*On the I-Portal web page*

*<https://iportal.fldfs.com/iframe/default.asp>*

## What is in the User's Manual?

- Creating an I-Portal account
- I-File options (Contact Us, Filing Search, etc.)
- Starting a new filing
- Filing Components
- How to submit a filing
- How to create a response filing (Add to a submitted filing)
- Review Submitted Filings
- Logging in with a work unit number
- Common I-File Questions

# What *else* is in the I-File User's Manual?

- Types and sizes of documents that can be submitted (p.42)
- Where to find a list of Filing Purpose descriptions (p.32)
- How it is determined whether or not RCS data is required for your filing (p. 62)
- Where to find RCS training materials (p. 63)
- How to retrieve a lost password (p. 83)
- How to handle employee changes (p. 84)

## Recent (July 2007) I-File Changes

- Interrogatories – a component that determines whether or not additional filing components are required based on the responses to questions – answers are permanent (once submitted cannot be changed)
- Rate Collection System (RCS) integrated with I-File
- Expanded Filing Component Lists for Commercial Products

## Common I-File Issue – Filing Purpose

- Choosing the incorrect Filing Purpose (Rates only, Rules only, Rate rule, etc.) is one sure way to have your filing returned.
- I-File User's Manual p. 32

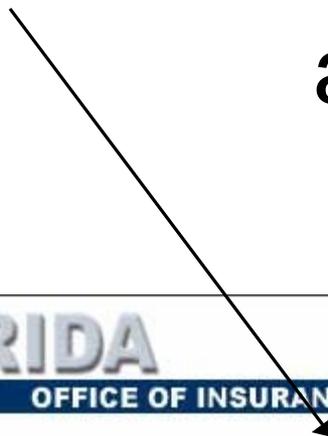
# Common I-File Issue – Interrogatories

- Since the responses cannot be changed after submitting the filing, and since they determine which filing components are included, incorrect responses will lead to the filing being returned.

## Common I-File Issue – Submit Filing

- Watch for the 2 emails when you submit a filing (initial or response). (Recall the first says going to check for compatibility, and the second gives results of compatibility check.)
- If you don't receive the second or if documents fail and you don't know how to fix – CONTACT US.

CONTACT US – click on  
'Contact Us' link on I-Portal to submit  
an issue



The screenshot shows the top navigation bar of the Florida Office of Insurance Regulation website. It features the state of Florida outline and the word "FLORIDA" in large letters, followed by "OFFICE OF INSURANCE REGULATION" and the state seal. Below this is a horizontal menu with links for Home, Help, Contact Us, Account, Filing Search, and Logout. The "Contact Us" link is highlighted with a blue background. Below the menu is the "iFILE" logo and the text "Filing Assembly Submission System".

## Common I-File Issue – Response Filing

- Click “Add to a submitted filing” only ONE time for each response you want to submit. A work unit number on the Filing Workbench is created for that response. Once created, go to the Filing Workbench to continue working on it.

# Common I-File Issue – Filing Workbench

- Keep it neat – you can delete filings you created, but do not plan to submit

# Common I-File Issue – Copy of Filing

- You have to use the I-File “Filing Search” feature to get a copy of what you submitted in the filing.

# Questions / Comments

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