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# **Making the Most of Your I-File Forms Submission**

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**Life and Health Product Review**





# **Welcome to the Industry Portal**

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**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**



# Beginning the process

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## **Form & Rate Filing Assembly and Submission**

Regulatory Electronic Filing System (REFS – Financial Related Filings)

Data Reporting

QUASR (Click here for FAQ's and Office of Insurance Regulation Website)

Professional Liability Claims

Workers Compensation Data Collection

Update Contact Information

iApply -- Online Company Admissions

## **Common Tasks**

**Start a new filing**

**Start Data Reporting**

**Submit a filings**

**Review submitted filings**

**Add to a submitted filing**





# As you get ready...

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**All forms must be legible and readable in an electronic format.**

**‘Forms Only’ for L&H forms - ‘Forms & Rates for others. (Health, LTC, DMPO)**

**One company & one coverage per filing.**

**‘Combo’ filings – separate but simultaneous.**

**Readability & Checklist certifications.**



**and don't forget to...**

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**SUBMIT**

**take that one last step!**



# Types of submissions

**- ORIGINAL**

**- RESPONSE**

**- EXTRA-CRISPY !**





# Original Submissions

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**Filing Rules – Chapter 690-149, F.A.C.**

**Product Codes – LOB & TOI**

**UDL –Contact & General Filing  
Information**

**ENTER DATA CAREFULLY!!!!**

**...while YOU were out.....**



# Uploading Your Forms

## Filing Component List

**Work Unit Number:** W08-410906

**Name:** TEST 3.25.08

**Purpose:** Forms Only

**Product:** Individual Nonvariable Life Term

[edit filing details](#)

Listed below are all the components required to submit this filing. To view a component, click on its name. Your changes are automatically saved. To review the current details of your filing, click "Review this Filing".

Component	Last Updated	Status
<a href="#">Company Data</a>	3/25/2008 09:35	Complete
<a href="#">Cover Letter</a>	3/25/2008 09:16	Incomplete
<a href="#">DIR-1507 L&amp;H Universal Standardized Data Letter</a>	3/25/2008 14:23	Complete
<a href="#">Forms Checklist</a>	3/25/2008 14:25	Complete
<a href="#">Forms to be Reviewed</a>	3/25/2008 09:16	Incomplete
<a href="#">Certification Statement: Valuation Standards (Optional)</a>	3/25/2008 09:16	-----
<a href="#">Certification Statement: Nonforfeiture Standards (Optional)</a>	3/25/2008 09:16	-----
<a href="#">Supplementary Information (Optional) Supplementary Documentation</a>	3/25/2008 09:16	-----

**FORMS TO BE REVIEWED**  
**CERTIFICATION STATEMENTS**  
**SUPPLEMENTARY  
INFORMATION**



# Are you sure ?

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# Communications

SENDING  
FORMS  
UNEXPECTEDLY

ADDING TO  
A SUBMITTED  
FILING



“CLARIFICATION”  
LETTERS ARE  
NOT  
DISAPPROVALS

**SUBMIT**



# About resubmissions...

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- **Previously Disapproved**
- **Florida File Number**
- **Address reasons for the disapproval in an item-by-item fashion**



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# **Making the Most of Your I-File Forms Submission**

**Thank You.**

