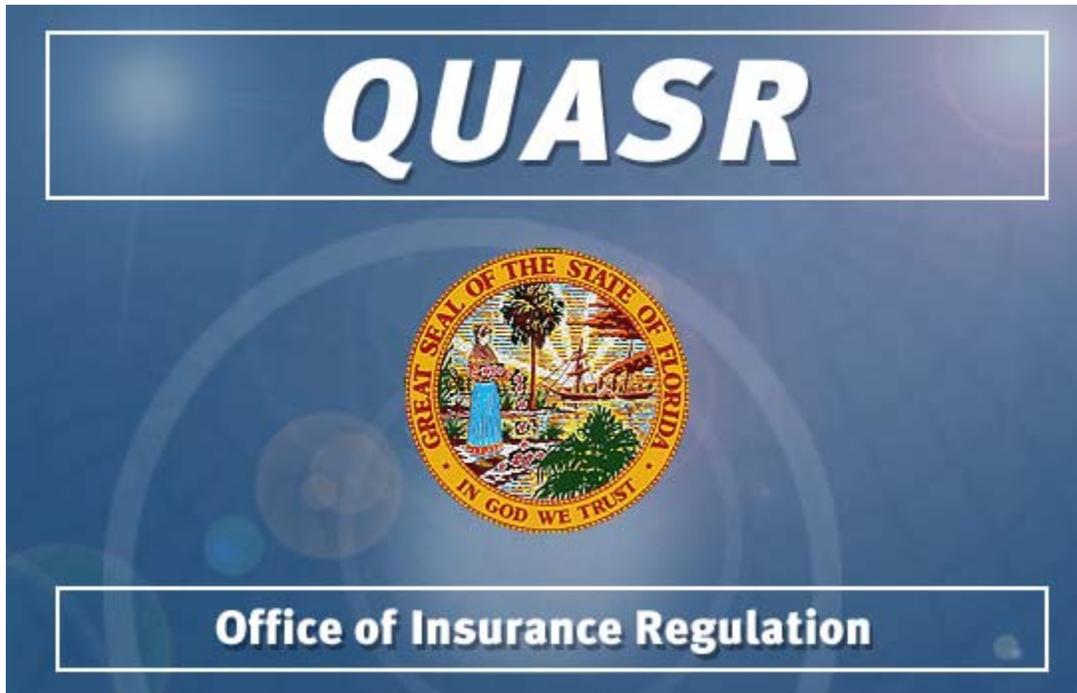




## User Guide

Please Note: This application was changed on April 1, 2015 and can only be accessed via the DCAM link on the Office's Industry Portal. See the Informational Memorandum located on the next page of this document for instructions.

# INDUSTRY USER GUIDE





INFORMATIONAL MEMORANDUM  
OIR-15-02M  
ISSUED  
March 27, 2015  
Florida Office of Insurance Regulation  
Kevin M. McCarty, Commissioner

## All residential property insurers in the State of Florida

### Changes to Electronic Filing Process of Quarterly Supplemental Report (QUASR)

The purpose of this Informational Memorandum is to inform insurers of changes to the electronic filing process for Quarterly Supplemental Reports (QUASR). The Office has made changes to this system in an effort to make the filing process easier and less time-consuming for insurers while keeping the same high level of transparency of information for consumers. This document contains detailed instructions for the employees in your company who are responsible for filing these reports. The Office will ask for feedback and comments from all filers. Our preliminary testing indicates that filers who have tried this new system believe it to be a substantial improvement. The last tab of the template is identical to the existing template to make it easy to adapt to the new format.

Beginning with the reporting for First Quarter, 2015, which commences on April 1, 2015, and ends May 15, 2015, filers will submit their Quarterly Supplemental Reports (QUASR) through the Office's Data Collection and Analysis Modules (DCAM) system at the address: <https://apps8.fldfs.com/DCAM/Logon.aspx>

By using DCAM, filers may submit Excel 1997-2003 forms in ".xls" extensions (as in the past) or the 2007 forms using the ".xlsx" extension.

A sample template can be obtained for viewing purposes from the Office website at: <http://www.floir.com/siteDocuments/FloridaQUASRTemplate.pdf>

The primary difference in the new and old templates is that the new template includes multiple tabs, each with its own purpose. There is no particular change in the filing medium as the last tab, named "Dump", is a replica of the current template. Users should submit their data on the "Dump" tab identically to how they use the current template.

In all, the new template contains six tabs and will initially open to the cover tab, named "Version". After the "Version" and "Instructions" tab there will be a "Contacts" tab. Certain company information is pre-populated on this tab, such as the company name, FEIN, NAIC code, and Florida Company Code. Filers should verify this information and complete any responses with missing information. For example, verify the reporting quarter ending date (there is a drop-down menu in the cell that can be used to select other quarters). The last question, "Treatment of current filing over last quarter's filing?", will be "New DATA Reporting" for the First Quarter of 2015, then will switch to "Continual DATA Reporting" in successive quarters.

The last line of the "Contacts" tab is a calculated Policies In Force (PIF) percentage that reports the calculated change from Month 3 of the last quarter to Month 3 of the current quarter. Since the First Quarter of 2015 will allow entries of "New DATA Reporting", this PIF percentage will remain at zero; however, the comparison to the former PIF count will be handled internally by the Office. In subsequent quarters this percentage will be actively reported in the template, and values over 110% will not be permitted.

The column to the right on the "Contacts" tab contains validations of "TRUE" or "FALSE" which are intended to provide guidance and expediency to the entire filing experience. A "TRUE" validation means that the

response to the line is within the range permitted; a “FALSE” validation means the response is not acceptable and the template will be rejected by DCAM until a valid response is entered.

After the “Contacts” tab, the “Data” tab of the new template merges the new data from the “Dump” tab with data from the previous quarter. For the First Quarter of 2015, there will be no previous data. However, in succeeding quarters the Month 3 data from the previous quarter will show on the pink rows (Month Zero “0”) of the “Data” tab, and the new data will populate on the three white rows (Months 1 through 3) on the succeeding rows after the pink row.

There are two features of this “Data” tab: first, the values being submitted new are aligned with the end of the previous period so that changes from the last period can be tracked month-to-month until the end of the current period. Second, to the far right, a validation column has been added just as was seen in the “Contacts” tab. If the row validates to “TRUE”, then all QUASR validations have been met and the row will be accepted by the DCAM system. If the row evaluates to “FALSE” then a description of why the row failed the validation test will appear to the right of the validation column.

Line values are introduced in the “Data” tab by pasting policy information in random order in the “Dump” tab. Entries on the “Dump” tab are then evaluated and reported on the “Data” tab in the validation column. In order to know a precise validation error, the far right of the “Data” tab line for the specific County, Policy Type, and Month Number must be examined. An easy way to determine whether errors exist on the “Data” tab is by checking at the top right of the “Data” tab (to the right of the company name). You will see a message that reads “NO ERRORS EVIDENT ON TAB” or it will read “FALSE VALIDATION COUNT” with the number of errors following the False Validation message.

Note that validations performed on the “Contacts” and “Data” tabs are performed within the Excel file itself. You will now have these results on your local computer without needing to upload them to learn if there is an error in the validations.

Special note: The original QUASR system will remain active for the filing of all quarters prior to the First Quarter 2015. The process of filing previous quarters has not changed. The change only affects the First Quarter of 2015 and future quarters. Continue filing data and correspondence prior to 2015 at the original QUASR address: <https://iportal.fldfs.com/ifile/default.asp>. Correspondence system will continue as before; however, requests from the Office for corrected certifications will be originating from another system.

## THE DCAM FILING PROCESS

Most companies are already using DCAM to submit other P&C data filings. If you are not among them, you may set up your DCAM account at any time. Instructions for creating an account in DCAM, for subscribing to your company in DCAM, and for creating a filing and uploading/downloading your template in DCAM are as follows:

- If you have never filed a QUASR report in the previous system, you must first enter the Office’s Industry Portal (iPortal) and set up an account there before continuing. The address for that is <https://iportal.fldfs.com/ifile/account/setup.asp>. Complete the required information (those fields with a red asterisk), including your user name (i.e., your email address) and a password of your choosing, then click “Create Account” at the bottom. You must activate this account when you receive the iPortal message in your email inbox. Note that a new account will not be created if the email address you enter as your user name was used before. If your email address was used before, choose “View your account” on the left, then “Retrieve lost password”. The password will be sent to you. Call the number below should you need assistance with creating a new account or accessing a previous account.
- Once an iPortal and/or QUASR account is assigned using your email address as the user name, enter DCAM using the link <https://apps.fldfs.com/DCAM/Logon.aspx>. The user name and password will be the same as you have previously used in iPortal or QUASR. If this does not work, it means that the iPortal account has not been set up properly. You may have to click on “Create Account” on the left and repeat the steps in the previous paragraph.

- If you have not used DCAM before, you must first create an account for DCAM. Click on “Setup” on the left and then “Contact Information”. Scroll to the bottom and click on “Use iPortal Account Information”. This will prevent you from having to enter everything a second time. Verify the information is current and accept the information to continue.
- Next click on “Setup” again, and locate the page with “Companies” and “Other Filing Entities”. Click on “Add Company”.
- Use the Company Search provided to locate your company by name or code, then click on “Search”. If the correct company is displayed click on “Add Company” a second time and “Save” this company. You may search again to subscribe to other companies, or click “Back”. By subscribing to your company, your account and company become linked, so you do not need to repeat this each time you file. Also, recognize that all other persons subscribed to the company you select will receive a notice that you have joined. For this reason, as a guard against improper subscriptions, *report any unauthorized subscriptions to the Office* using the contact information below.

The following instructions explain how to create a filing in DCAM. QUASR filings will be available April 1, 2015.

- Enter DCAM using the link <https://apps.fldfs.com/DCAM/Logon.aspx>
- Click on “Create New Filing” under “Common Tasks” (left side of screen) then on the next screen click on “Next” to proceed.
- Choose “Company” then “Next”. If the name of the Company for which you are filing does not appear on the next screen, then the subscription setup was not completed properly. You need to repeat that portion of the earlier instructions then return to this step.
- Select the Company Name. Note that all companies you subscribed to will appear here, and you can only create a filing for one company at a time. Click “Next”.
- For Module, select “Quarterly Supplemental Reporting (P&C)” then “Next”.
- For Event, select “QUASR Quarterly Supplemental Reporting for 2015” (only option on this screen at this time) then “Next”.
- For Period, select “QUASR Reporting for First Quarter” (only option on this screen at this time) then “Next”.
- For Purpose, select either “Data” or “No Data” as the purpose of the filing. Filers may not choose “No Data” unless they chose “No Data” in the previous quarter, or their “Data” report indicated they had no policies to report. Click on “Next”.
- Verify the information on this final screen. If this information is correct, click on “Create Filing” then “OK” to the following message.
- You should now be back on your workbench and either the “Data” or “No Data” tab will show the filing that was created. View the components for your filing by clicking directly on the work file number, which shows in blue type.
- Select components by clicking directly on any component name in the component list.
- The data template is a required component of a “Data” filing. Click on the data template name to go to the Upload/Download screen.

- Download the template by clicking on “Download Template”. This will open a “.xlsx” version of the template in Excel. If you are using an older version of Excel (such as 2003) or another type of spreadsheet software, click on the next link (shown as “here”) for that version. Your result will be in “.xls” format.
- Once you have opened the template, save it to your local or shared drive. Open the Contacts page and verify the information displayed. Complete any responses that are not present so that all data validation are “TRUE”.
- Policy information is submitted into the template as a local operation. It may either be typed directly into the “Dump” tab, or you may copy and paste all of your file dump information into the “Dump” tab.
- After your data has migrated to the “Data” tab, verify that no validation errors exist at the top of the “Data” tab. If this is not the case, locate the rows where data validations are marked “FALSE”. The message to the right of each “FALSE” validation should prove helpful in solving any data problems for a given row. If you cannot determine a cause for a “FALSE” value, contact the Market Data Collections Unit (information below).
- Complete a certification, signed by a company officer and formatted as a PDF document, and upload it to the QUASR Certification Component. **Your filing is not complete unless you also file an executed certification with your submission.** The certification form is located at this address: <http://www.floir.com/siteDocuments/CompanyOfficerCertificationForm.pdf>

Additional filing information:

- Do not upload documents to the “Response for Request for Clarification” component; this is for later use should questions arise about your submission.
- When you have loaded the filing components, submit your filing by clicking on the “SUBMIT” button in the pink box (scroll up if you don’t see it).
- Your submission is considered filed *only after* you receive an email receipt showing your file log number. This file log number IS NOT the same as the work file number on your workbench. If, after an hour or two, your filing is still on your workbench, then the filing was not accepted. Determine your error and re-submit the filing. If assistance is needed, use the contact information above to reach the Market Data Collections Unit.

If you have any questions regarding this filing process, please contact the Market Data Collections Unit at 850-413-3147 or via email:

[QUASR@floir.com](mailto:QUASR@floir.com)

Your prompt cooperation in this effort will be greatly appreciated.

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# I. INTRODUCTION

## **ABOUT THIS SECTION**

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This section provides an overview of the user guide and the QUASR<sup>ng</sup> application. Background information on the application, technical specifications for accessing the web site, and useful reading tips for this guide are discussed.

## About QUASR<sup>ng</sup>

Insurers conducting business in the state of Florida are required by Florida statute to report statistical information to the Florida Office of Insurance Regulation (OIR) on a quarterly basis. The Quarterly Supplemental Reporting System—Next Generation (QUASR<sup>ng</sup>) is employed by the Office of Insurance Regulation to collect and analyze data submitted by Insurers across the state. QUASR<sup>ng</sup> improves upon the functionality of the existing QUASR application, which facilitates the management of quarterly supplemental reports through two major functions: the creation/modification of quarterly supplemental reports, and the exporting/archiving of quarterly supplemental reports. The system is designed to allow insurers the ability to file aggregate policy, exposure, and premium information and produce reports from the filed data. The new QUASR<sup>ng</sup> application contains the same functionality as the system it is replacing, but with enhanced system features.

QUASR<sup>ng</sup> adds the following new features and functionality to what users currently expect and use in the existing QUASR system: the ability to add Lines of Business for reporting purposes, enhanced searching capabilities, and a compliance management module.

### 1.1 About this Guide

The purpose of this user guide is to describe, in detail, the features and functions of the QUASR<sup>ng</sup> application.

#### 1.1.1 Reading/Usage Tips

When reading this document, the following should be kept in mind:

- A glossary is included at the end of this document to define terms and acronyms.
- Different font styles are used to aid the user in understanding the differences between Web site screens and links found on a Web site screen. The table below defines the styles.

CONVENTION	DESCRIPTION
<i>Italics</i>	Used to denote the name of a screen. For example: <i>Home</i> screen.
<u>Underline</u>	Used to denote a button or link to be clicked. For example: Click <u>OK</u> .
<b>Blue Font</b>	Used to denote a reference to another section of this document or a hyperlink to a Web site. Clicking on the text with the blue font will take you to that section within the document or to the referenced Web site.

- Icons are used throughout the User Guide to identify important information or helpful hints. The table below defines the icons and how they are used.

ICON	DESCRIPTION
	This icon is used to indicate a helpful tip.
	This icon is used to indicate important information. Oftentimes, this symbol is used to remind you of required steps in a process.

## 1.2 Technical Information Regarding the Application

In order to have the best experience using the QUASR<sup>ng</sup> application, please be mindful of the system requirements and other technical information contained in the following sections.

### 1.2.1 Operating System Specifications

The QUASR<sup>ng</sup> application supports the following operating system:

- Windows 98 or higher

### 1.2.2 Software Specifications

For preparing and uploading filing information into the QUASR<sup>ng</sup> application, client machines must have Microsoft Office Excel or Microsoft Excel for Mac software installed.

### 1.2.3 Browser Specifications

The QUASR<sup>ng</sup> application supports the following browser types:

- Microsoft Internet Explorer 6.0 and higher (Windows)

## II. APPLICATION OVERVIEW

### ABOUT THIS SECTION

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This section provides an overview of the QUASR<sup>ng</sup> application. In this section the following topics are discussed:

[Launching the Application](#)

[Creating a New Account](#)

[Retrieving Lost Passwords](#)

[The User Home Screen](#)

## Overview

The Quarterly Supplemental Reporting System—Next Generation (QUASR<sup>ng</sup>) is an application that facilitates the collection and analysis of Insurer data across the state of Florida. The application provides real-time web-based access to consumers and policymakers. The QUASR<sup>ng</sup> system has the following general capabilities: Insurer Filing, Analyst Review, and Public Search. Together, these components comprise the functions of the new system. The focus of this user guide is on the insurer filing section.

### 1.3 Accessing QUASR<sup>ng</sup>

To access the application you must have an Industry Portal (IPORTAL) account. Once you have an IPORTAL user account you may log in and begin using the QUASR<sup>ng</sup> application.

#### 1.3.1 Creating IPORTAL User Accounts

To create a new IPORTAL user account required for accessing QUASR<sup>ng</sup>

1. Access IPORTAL at <https://iportal.fldfs.com>.
2. Click QUASR<sup>ng</sup>.
3. Click New Account.
4. Complete all required fields on the registration form and click Create Account.
5. Click Done on the registration confirmation screen.
6. Access the e-mail account you used during registration and follow the steps outlined in the e-mail to complete your account registration.



You must complete the steps outlined in the e-mail within seven days of receiving the e-mail or your account will be removed from the system.

#### 1.3.2 Logging into QUASR<sup>ng</sup>

To log into QUASR<sup>ng</sup> using your IPORTAL account credentials:

1. Access <https://iportal.fldfs.com> using a web browser window.
2. Click QUASR<sup>ng</sup>.
3. Enter your IPORTAL Username and Password and click Log In.



The system allows for four incorrect log-in attempts. If you attempt an unsuccessful login four times, the system will lock your account on the fifth attempt. You will need to contact an administrator to have your account reset.

### 1.3.3 Retrieving Lost Passwords

Passwords can be retrieved automatically from the system. All passwords are sent to the e-mail address provided during account registration. If you would like your password sent to the e-mail address you provided during registration, click the Retrieve Lost Password hyperlink from the QUASR<sup>ng</sup> *Log in* screen.

## 1.4 User Home Screen

Upon successfully logging into IPORTAL and the QUASR<sup>ng</sup> application you will be directed to the *Industry User Home Page*. From this screen in the application, you can view the insurers to which you are currently subscribed and/or subscribe to new insurers.

The *Industry User Home* screen is divided into the following sections:

Application Toolbar

Task Bar

Subscribed Insurer Table

**OFFICE OF INSURANCE REGULATION**  
FAIR. FAST. PROFESSIONAL.

OIR Home I-PORTAL CONTACT US

**QUASR**  
next generation

**Industry User Home Page**

1. All required filings for April (04/01/2008-04/30/2008) reporting period are due 5/30/2008.

**You are actively subscribed to the following insurer(s):** (Click the link of the insurer for whom you would like to view/submit a filing.)

<input type="checkbox"/>	Insurer Name	FEIN	NAIC Company Code
<input type="checkbox"/>	GENERAL STAR NATIONAL INSURANCE COMPANY	131958482	11967
<input type="checkbox"/>	GREAT DIVIDE INSURANCE COMPANY	450397186	25224

Subscribe to New Unsubscribe

Office of Insurance Regulation Long Range Program Plan · Contact Us · Mission Statement · Florida Department of Financial Services

200 East Gaines Street, Tallahassee, FL 32399  
(850) 413-3140

### 1.4.1 Application Toolbar

The Application Toolbar is located at the top of each screen in the application. The Toolbar allows for easy navigation to the main IPORTAL screen as well as hyperlinks to pages on application support and contact information.



Elements of the Application Toolbar are:

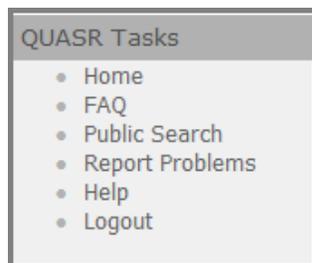
- OIR Home — link to the *Office of Insurance Regulation Home* screen. Selecting the link from anywhere in the application will navigate you to this screen.
- I-PORTAL — hyperlink to the Office of Insurance Regulation's *Industry Portal* screen.
- Contact Us — hyperlink to the *Issue Tracking System* screen. Here, users may report problems or issues found within the application.



For phone number and address information for offices within the department (Office of Insurance Regulation), select the Contact Us link located at the bottom of the screen.

### 1.4.2 Task Bar

The Task Bar is located on the left-hand side of all screens in the application and allows the user to navigate to common tasks.



Links on the QUASR Tasks Bar are:

- Home — hyperlink to the *Industry User Home Page*.
- FAQ — hyperlink to a screen where frequently asked questions are displayed.
- Public Search — hyperlink that when selected navigates you to the *QUASR<sup>ng</sup> Public Search Page*. Here, public users can generate robust reports on QUASR<sup>ng</sup> data filings.
- Report Problems — hyperlink to a screen where problems encountered on the website may be reported.
- Help — hyperlink to the *Help* screen and User Guides.
- Logout — hyperlink that when selected logs you out of the system.

### 1.4.3 Subscribed Insurers Table

The Subscribed Insurer Table contains a list of all the insurers subscribed to by the user. Subscribing to insurers allows the user to submit QUASR filings and view and initiate correspondence on behalf of an insurer. For a first-time user who has not subscribed to any insurers, this table will be empty. The table displays an unsubscribe checkbox, the name of the insurer, FEIN number, and NAIC company code. The name of the insurer is a link. When clicked this link will take the user to the Insurer Screen.

## 1.5 Insurer Screen

The *Insurer* screen displays details about the selected insurer; including, reporting period details, current correspondence, access to previous correspondence, the list of subscribers and the insurer's Lines of Business. This screen is accessed directly from the Subscribed Insurers Table on the *Industry User Home* screen.

**OFFICE OF INSURANCE REGULATION**  
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**XYZ Insurance Company**

Select Another Insurer:

**QUASR Tasks**

- Home
- FAQ
- Public Search
- Report Problems
- Help
- Logout

Quarterly Reporting Period Filings

Reporting Period	Due Date	Filing Status	Submission Date	PIF Status	Filing History	Filing Action
Quarter 1 (01/01/2008-03/31/2008)	04/01/2008	Not Submitted				[Create Filing]

Select Year:

Monthly Reporting Period Filings

Periodic Reporting Period Filings

Correspondence Received from OIR:

Ref#	Received	Subject	Last Name	First Name	Recipient
1032	5/6/2008 3:54:06 PM	QUASRng Submission Error	Imburgia	Julie	imburgiaj@infinity-software.com

[View Correspondence](#)  
[Initiate Correspondence](#)

Subscribers for XYZ INSURANCE COMPANY

Last Name	First Name	Username
Imburgia	Julie	imburgiaj@infinity-software.com

Line(s) of Business for XYZ INSURANCE COMPANY

Authority Category	Authority Type	Authority Status	Authority Status Date	Line of Business	LOB Status	LOB Status Date
PROPERTY AND CASUALTY INSURER	CERTIFICATE OF AUTHORITY	ACTIVE		COMMERCIAL AUTOMOBILE LIABILITY	ACTIVE	07/20/1992
PROPERTY AND CASUALTY INSURER	CERTIFICATE OF AUTHORITY	ACTIVE		OTHER LIABILITY	ACTIVE	07/20/1992
PROPERTY AND CASUALTY INSURER	CERTIFICATE OF AUTHORITY	ACTIVE		COMMERCIAL AUTO PHYSICAL DAMAGE	ACTIVE	07/20/1992
PROPERTY AND CASUALTY INSURER	CERTIFICATE OF AUTHORITY	ACTIVE		LIVESTOCK	WITHDRAWN APPL	09/26/2005
PROPERTY AND CASUALTY INSURER	CERTIFICATE OF AUTHORITY	ACTIVE		BURGLARY AND THEFT	ACTIVE	12/16/2004

The *Insurer* screen defaults to display information for the selected insurer and the current reporting year. Information for another year can be displayed by changing the year selection in the ‘Select Year’ dropdown list. Additionally, if you are subscribed to more than one insurer you may switch to another insurer’s *Home* screen by changing the selection in the ‘Select Another Insurer’ dropdown list.

The *Insurer* screen is divided into the following sections:

- Filings Tables (Quarterly, Monthly, and Periodic)
- Correspondence Received Table
- View Correspondence Link
- Initiate Correspondence Link
- Subscribers Table

## Line(s) of Business Table

### 1.5.1 Filings Tables

The Filings Tables display required filings associated with the reporting period and year. There are three filing tables; one for each of the filing types. To view the tables select the (+) sign to expand the table. Use the (-) sign to collapse the table. If an insurer is not required to file for a specific reporting year, “No Data Found” will display when the table is expanded.

Data elements that comprise each of the Filings Tables are defined below.

- **Select Year Drop-down list box** — allows you to change the year for which filing data are displayed for the Quarterly, Monthly, and Periodic tables. The dropdown list displays all years wherein filing data has been submitted.



If a periodic reporting period starts in one year and has an end date in the next year, data for the period are inclusive to the year in which the period started

- **Reporting Period** — displays the reporting periods associated with each filing. This field lists the type of period (Quarterly, Monthly, or Periodic) and the dates that the reporting period spans.
- **Due Date** — displays the date the filing is due. If a filing extension has been granted, an extension icon will appear in this field. The extension date is displayed by placing the mouse pointer over the icon.
- **Filing Status** — displays the status of the filing for the particular period. Filing status values are: Not Submitted, Submitted-Data, and Submitted-No Data. “Submitted-Data” displays as a hyperlink. When selected, this link navigates the user to the *View Submitted Data* screen which shows the most recent filing for the associated reporting period.
- **Original Submission Date** — the date a QUASR<sup>ng</sup> Filing was first submitted. When Filing Status is “Not Submitted”, this field will be empty.



If a filing is invalidated by an Administrator, the system will use the first submitted filing date after the invalidation as the original Submission Date.

- PIF Status — displays the Policies in Force (PIF) status for submitted filings. Only quarterly and monthly filing tables display PIF status. PIF status examples are: Within Range or Out of Range. Non-submitted filings do not have a PIF status. When PIF status is “Out of Range” the Reporting Period, Due Date, and Submission Date field data are displayed in red font color. The calculation used to determine whether PIFs are within range or out-of-range is shown in [Appendix D](#). If a filing shows a PIF Status of “Out of Range” it must be corrected and re-submitted before the system will accept another filing.
- Filing History — displays a hyperlink that when selected navigates you to the *Filing History* screen. When no filing or only one filing has been successfully submitted for a given reporting period, the Filing History field will be empty. The most current filing is the filing of record and displays in bold font in the filing history table.
- Filing Action — displays a link that when selected allows you to submit or resubmit a filing.

### 1.5.2 Correspondence Table

The Correspondence Table displays messages sent and received through QUASR<sup>ng</sup>. Types of messages that appear in the Correspondence Table are messages resulting from submission of an invalid data filing and messages initiated by OIR staff and industry users.

- Status Icon — indicates whether a correspondence is read or unread. A piece of correspondence will display on the Insurer Screen until it has been opened. Clicking on the icon will navigate you to the *Correspondence* screen.
- Attachment Icon — indicates that a file is attached to the correspondence.
- Ref # — unique number assigned by the system to each correspondence. Clicking on the number will navigate you to the *Correspondence* screen.
- Sent — displays the date and time that the correspondence was sent.
- Subject — displays the subject of the correspondence as it was entered by the sender.
- Last Name — displays the last name of the insurer representative from whom the correspondence was originally submitted to OIR
- First Name — displays the first name of the insurer representative from whom the correspondence was originally submitted to OIR.

- Recipient — displays the email address of the insurer from whom the correspondence was received.

Select the reference number link of each correspondence to view and/or reply to the message. Refer to the section on [Correspondence Procedures](#) for further details on viewing and responding to industry correspondence.

### 1.5.3 View Correspondence

The View Correspondence hyperlink is an active link, that when selected, navigates you to the *View Correspondence History* screen. Refer to the section on [Searching and Viewing Historical Correspondence](#) for further details on viewing correspondence.

### 1.5.4 Initiate Correspondence

Selecting the Initiate Correspondence hyperlink navigates you to the *New Correspondence* screen. From here, you can create a new correspondence to OIR. Refer to the [Initiate Correspondence](#) section for further information on how to send a new correspondence.

### 1.5.5 Subscriber's Table

The Subscribers Table displays all persons subscribed to the selected insurer. Data elements that comprise the Subscriber's table are:

- Last Name — displays the subscriber's Last Name as provided in IPORTAL.
- First Name — displays the subscriber's First Name as provided in IPORTAL.
- Username — displays the subscriber's IPORTAL e-mail address.

The Subscriber's Table can be sorted in ascending and descending order by last name, first name, and username. Click the column heading to sort by a particular field.

### 1.5.6 LOB Table

The LOB Table displays the Lines of Business for the associated insurer. The system maps Lines of Business to one or more policy types. Policy types; however, will only map to one Line of Business.

Data elements that comprise the LOB Table are:

- Authority Category — name associated with the selected insurer's Category of Authorization.
- Authority Type — name associated with the selected insurer's Type of Authorization.
- Authority Status — Authority Status associated with the selected insurer. Examples of Authority Status are: Active, Surrendered, Withdrawn, and Revoked.

- Authority Status Date — displays the date when the authority status was issued.
- Line of Business — the Line of Business name associated with the insurer.
- LOB Status — LOB status associated with the selected insurer. Examples of LOB status are: Active, Surrendered, Withdrawn, and Revoked.
- Line of Business Status Date — displays the date when the LOB status was issued.

# III. OPERATIONAL PROCEDURES

## ABOUT THIS SECTION

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This section describes step-by-step instructions for subscribing to individual insurers, submitting filings, and corresponding with the Office of Insurance Regulation. Specific topics include:

[Subscribing to Insurers](#)

[Filing Procedures](#)

[Corresponding with OIR](#)

[Generating Reports](#)

## Subscribing to an Insurer

You must subscribe to an insurer in order to submit filings, view filing histories, and participate in correspondence on behalf of an insurer. You may subscribe to one or many insurers.

To subscribe to an insurer:

Select Subscribe to New from the *Industry User Home Page*. The *Subscribe* screen will display. Here, parameter fields used to search for a specific insurer(s) are displayed.

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**Subscribe**

Subscribing to a company allows the user to submit QUASR filings and review previously submitted filings. The user may also send correspondences to the Office and review previously submitted correspondences for this company. Each subscribed user to this company will be sent an email when another user subscribes to the company.

**Search Insurer(s):**

Insurer Search

Anywhere  Starts With  Exact Match

Insurer Name:

FEIN:

NAIC Group Code:

NAIC Company Code:

Search

Back

Using the search fields provided, execute a search for a specific insurer or group of insurers.

To search by Insurer Name, first select the radio button next to Anywhere, Starts With, or Exact Match. Otherwise, go to step 4.

Anywhere — will return a list of insurers that contain the text entered into the Insurer Name field anywhere in its name.

Starts With — will return a list of insurers that begin with the text entered into the Insurer Name field.

Exact Match — will return only insurers that match exactly with the text entered into the Insurer Name field.

Type the Insurer Name (or a partial Insurer Name) into the Insurer Name field.

Type the FEIN number, NAIC Group Code, or NAIC Code in its respective field. You may only execute a search using ONE of the search fields. Deleting/clearing data from a search field will re-enable all fields to accept text.

Click Search. The Insurer Search Results will display at the bottom of the screen. If you were unable to find the insurer you were looking for you may perform a new search using the search fields again

Select the check box or check boxes of the insurers to which you would like to subscribe.

Click Subscribe when you have finished selecting the insurers.



You will not be able to subscribe to multiple insurers at one time if they are located on different pages of the search results screen. You may only subscribe to insurers that are located on the page you are on when you select "Subscribe".

After subscribing to insurers, you will be returned to the *Industry User Home Page*. The insurers to whom you just subscribed will be displayed in the Subscribed Insurer Table. Click the back button at any time to cancel subscribing to insurers and return to the *Industry User Home Page*.

## Filing Procedures

Data filings submitted to OIR on a quarterly, monthly, and periodic basis are uploaded to QUASR<sup>ng</sup> or submitted via a web service to the system. At the end of every reporting period, a filing record is generated for any insurers required to file for that period. The filing records are displayed in a Filings Table on each *Insurer* screen. If there are no filings required of an insurer for a specific reporting period, the system will display a “No Data” message in place of the Filings Table.

An example of a Quarterly Filings Table is shown below.



If an insurer is not required to file for a specific filing period and would like to submit a data filing for that period, a correspondence indicating this request must be sent to the Office of Insurance Regulation. Refer to [Initiate Correspondence](#) for further information on submitting requests to file data.

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XYZ Insurance Company

Select Another Insurer:

---

**QUASR Tasks**

- Home
- FAQ
- Public Search
- Report Problems
- Help
- Logout

Quarterly Reporting Period Filings Select Year:

Reporting Period	Due Date	Filing Status	Submission Date	PIF Status	Filing History	Filing Action
Quarter 4 (10/01/2007-12/31/2007)	02/14/2008	Not Submitted				<a href="#">[Create Filing]</a>
Quarter 3 (07/01/2007-09/30/2007)	11/14/2007	Not Submitted				<a href="#">[Create Filing]</a>
Quarter 2 (04/01/2007-06/30/2007)	08/14/2007	Not Submitted				<a href="#">[Create Filing]</a>
Quarter 1 (01/01/2007-03/31/2007)	05/15/2007	Not Submitted				<a href="#">[Create Filing]</a>

Monthly Reporting Period Filings

### 1.6 Submit/Re-Submit Data Filings via Microsoft Excel

Various business rules governing data submission are recognized by the system. Before attempting to submit or re-submit data filings the following guidelines must be met:

Data filings must be submitted in chronological order. The system will prohibit the submission of data for the current reporting period if any previous period’s data has not been submitted. Enforcement of the chronological order rule applies to Quarterly, Monthly, and Periodic filing periods.

When filing a Quarterly Report, the system will only allow a user to submit/resubmit a filing when the PIF status for the four previous quarters is not “Out of Range”. The calculation used by the system to determine whether a PIF is deemed out of range is shown in [Appendix D](#) of this guide.

In addition to the business rules detailed above, there are common formatting considerations for data submissions. Refer to [Appendix B](#) for a list of data formatting requirements. If all business rules regarding filing submissions are met, data can be filed or re-submitted using OIR’s Excel template.

To submit/re-submit data filings via Microsoft Excel:

1. Log in to the application.
2. From the *Industry User Home Page* select the insurer name for which you are submitting a data filing. If the insurer for which you are submitting is not found on this screen, refer to [Subscribing to Insurers](#) for information on adding insurer(s).
3. Expand the table to display the reporting period for which you are submitting data.

The screenshot displays the QUASR application interface for XYZ Insurance Company. At the top, the header includes the Office of Insurance Regulation logo and the slogan "FAIR, FAST, PROFESSIONAL". Below this are navigation buttons for "OIR Home", "I-PORTAL", and "CONTACT US". The main content area features the QUASR logo and the company name "XYZ Insurance Company". A dropdown menu for "Select Another Insurer:" is set to "XYZ Insurance Company". A "Select Year:" dropdown is set to "2007". On the left, a "QUASR Tasks" sidebar lists options like Home, FAQ, Public Search, Report Problems, Help, and Logout. The main area shows a table titled "Quarterly Reporting Period Filings" with columns for Reporting Period, Due Date, Filing Status, Submission Date, PIF Status, Filing History, and Filing Action. The table lists four quarters (Quarter 4 to Quarter 1) for 2007, all with a "Not Submitted" status and a "[Create Filing]" link. Below the table, there is a link for "Monthly Reporting Period Filings".

Reporting Period	Due Date	Filing Status	Submission Date	PIF Status	Filing History	Filing Action
Quarter 4 (10/01/2007-12/31/2007)	02/14/2008	Not Submitted				[Create Filing]
Quarter 3 (07/01/2007-09/30/2007)	11/14/2007	Not Submitted				[Create Filing]
Quarter 2 (04/01/2007-06/30/2007)	08/14/2007	Not Submitted				[Create Filing]
Quarter 1 (01/01/2007-03/31/2007)	05/15/2007	Not Submitted				[Create Filing]

4. Click the [Create Filing](#) or [Resubmit Filing](#) link for the appropriate filing period. The *Create Data Filing* screen will display.



If any of the business rules for submitting data files are violated, an error message will display. The reason for the submission failure will be explained.

5. Ensure the appropriate filing period and filing dates display. If the filing period is incorrect, click the [back](#) button to return to the *Insurer* screen to select a different reporting period.



6. (Optional Step) Click the [Excel Sample File](#) hyperlink to open the Microsoft Excel template. The template will reflect the filing type for the period you are reporting (i.e., If you are reporting quarterly data, the Excel template will have appropriate field titles for quarterly reporting).

 This is an optional step. If you have a completed spreadsheet that is ready to be uploaded, skip to step 9.

7. Click [Save](#). The Save Dialog Box will open. Enter a name for the new document and save it to a place on your computer or company network.
8. Open the Excel template and using the guidelines provided, complete the spreadsheet. Save and close the spreadsheet when you are finished.
9. Select the 'Data Filing' radio button. The File Upload Control will display on the screen.
10. Click the [browse](#) button to open a dialog box for locating and selecting the Excel file. Select the appropriate Excel file.
11. Click the [Upload](#) button.

 When the file is uploaded, the system will perform a validation check of the file. You will be notified through your IPORTAL e-mail account whether the file passed or failed the validation check. If the file fails the validation check you will be informed in the e-mail of the errors. If a filing does not pass the validation checks it is NOT accepted by the system and will not show as "submitted". A filing that has failed the validation checks is not held by the system. It cannot be accessed by anyone inside OIR.

## 1.7 Submit Data Filing via Web Service

Industry insurers that have existing data management systems may leverage QUASR<sup>ng</sup> Web Services to submit required data filings. This service is intended primarily for use by developers. Data filings should be submitted to <https://apps.fldfs.com/webservices/qsrng/submitws.asmx>. This service currently supports SOAP v1.1 and v1.2. See the table in [Appendix C](#) for the property definitions of the Submission Object. A sample SOAP request and response is available at the web address shown above.

## 1.8 Submit No Data Filings

To submit a No Data filing for an insurer requires that certain criteria/rules be met. Criteria for submitting No Data Filings are detailed below.

The system will prohibit a “No Data” QUASR filing if a PIF was reported for the third month of the immediately preceding quarterly filing or for the immediately preceding month of a monthly filing.



A data filing showing all policies in force as cancelled, nonrenewed, or transferred must be submitted for a reporting period before a ‘No Data’ filing can be submitted.

A filing cannot be re-submitted as a No Data Filing if the original filing for that period and type contained data. However, if the original submission is invalidated by an OIR Administrator a re-submission may be filed as ‘No Data’.

If all business rules regarding filing submissions are met, No Data Filings can be submitted by following the steps outlined below:

1. Log in to the application.
2. From the *Industry User Home Page* select the insurer name for which you are submitting a No Data filing. If the insurer for which you are submitting is not found on your *Home* screen, you will need to subscribe to the insurer. Refer to the section, [Subscribing to Insurers](#), for further information.
3. Expand the Reporting Period Filings table for which you are submitting a No Data filing.
4. Click the [Create Filing](#) or [Resubmit Filing](#) link for the appropriate filing period. The Create Data Filing screen will display.
5. Ensure the appropriate filing period and filing dates display. If the filing period is incorrect, click the [back](#) button to return to the Insurer screen to select a different reporting period.
6. Select the ‘No Data Filing’ radio button. A confirmation statement will appear.
7. Read the confirmation statement and click [Yes](#) to submit the No Data Filing. Clicking [No](#) or [back](#) will cancel the No Data Filing submission.

8. Upon selecting 'Yes', a message will display confirming the submission of the No Data Filing and an e-mail will be sent by the system to all subscribers of the insurer.

### 1.9 View Submitted Data Filings

Once a data filing has been submitted for a reporting period, the contents of the filing are accessible to all subscribed users of that company. Upon a data submission, the Filing Status field in the Reporting Period Filings Table changes from 'Not Submitted' to 'Submitted-Data'. To view the contents of a data submission for a reporting period:

1. Navigate to the appropriate *Insurer Home* screen.
2. Expand the Reporting Period Filings table for the data filing you wish to view.
3. Click on the Submitted-Data hyperlink of the appropriate filing.

Quarterly Reporting Period Filings						Select Year: 2006
Reporting Period	Due Date	Filing Status	Submission Date	PIF Status	Filing History	Filing Action
Quarter 4 (10/01/2006-12/31/2006)	01/15/2007	<a href="#">Submitted - Data</a>	5/10/2008 1:52:04 PM	WITHIN RANGE		[Resubmit Filing]
Quarter 3 (07/01/2006-09/30/2006)	10/15/2006	<a href="#">Submitted - Data</a>	5/10/2008 1:43:03 PM	WITHIN RANGE		[Resubmit Filing]
Quarter 2 (04/01/2006-06/30/2006)	07/15/2006	<a href="#">Submitted - Data</a>	5/10/2008 12:22:03 PM	WITHIN RANGE		[Resubmit Filing]
Quarter 1 (01/01/2006-03/31/2006)	04/15/2006	<a href="#">Submitted - Data</a>	5/10/2008 12:01:06 PM	WITHIN RANGE		[Resubmit Filing]
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Monthly Reporting Period Filings</span> <span>↑</span> </div> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Periodic Reporting Period Filings</span> </div>						

The *View Submitted Data* screen will open displaying the contents of the data filing. The contents of the filing may be printed or exported to a file from this screen.



The Excel file created by exporting the submission data is not in the same format as is required for data submissions. This file CANNOT be re-used to submit data filings.




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Home [Compliance Reports](#) [Manual](#) [Reports](#) [Report Problems](#)

Username: user | [Logout](#)

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**View Submitted Data**

XYZ Insurance Company

Filing Type: QUARTERLY  
Submission Date: 05/10/2008 04:10 PM  
FEIN: 391341459

Reporting Period: Quarter 1 (01/01/2007-03/31/2007)  
Due Date: 05/15/2007  
Filed By: John Smith

County	Policy Type	Month	Policies In Force	Policies Canceled	Policies NonRenewed	Policies Canceled Due To Hurricane Risk	Policies Nonrenewed Due To Hurricane Risk	New Policies Written	Policies Excluded Wind Coverage	Policies Included Wind Coverage	Total Dollar Value Wind Coverage	Total Dollar Value Without Wind Coverage	Books of Business Transferred	Books of Business Received	Total Premiums Include Wind	Total Premiums Excluding Wind	Total Premiums Written
Alachua	Homeowners	1	230	0	0	0	0	0	104	126	45000	27000	0	0	126000	104000	230000
Alachua	Homeowners	2	230	0	0	0	0	0	104	126	45000	27000	0	0	126000	104000	230000
Alachua	Homeowners	3	110	0	0	0	0	0	104	6	5000	27000	0	0	6000	104000	110000
Escambia	Mobile Homeowners	1	220	0	0	0	0	0	87	133	73000	43500	0	0	133000	87000	220000
Escambia	Mobile Homeowners	2	220	0	0	0	0	0	87	133	73000	43500	0	0	133000	87000	220000
Escambia	Mobile Homeowners	3	220	0	0	0	0	0	87	133	73000	43500	0	0	133000	87000	220000
Gadsden	Homeowners	1	150	0	0	0	0	0	82	68	27500	66000	0	0	68000	82000	150000
Gadsden	Homeowners	2	150	0	0	0	0	0	82	68	27500	66000	0	0	68000	82000	150000
Gadsden	Homeowners	3	150	0	0	0	0	0	82	68	27500	66000	0	0	68000	82000	150000
Hillsborough	Mobile Homeowners	1	153	0	0	0	0	0	57	96	65000	42500	0	0	127000	57000	184000
Hillsborough	Mobile Homeowners	2	153	0	0	0	0	0	57	96	65000	42500	0	0	127000	57000	184000
Hillsborough	Mobile Homeowners	3	153	0	0	0	0	0	57	96	65000	42500	0	0	127000	57000	184000

[Export To Excel](#) [Print](#) [Back](#)

### 1.9.1 View Resubmission Filings

The contents of all data submissions are accessible in the system. If multiple filings have been submitted for a filing period, you may view the content of each of the data filings. A hyperlink will display in the Filing History field of the Filings Table for reporting periods in which more than one filing has been submitted. The hyperlink provides access to the *Filing History* screen, where all data submissions for that reporting period are shown. To view all filings submitted for a specific reporting period:

1. Navigate to the appropriate *Insurer Home* screen.
2. Expand the Reporting Period Filings table for the data filings you wish to view.

Quarterly Reporting Period Filings						Select Year: 2007
Reporting Period	Due Date	Filing Status	Submission Date	PIF Status	Filing History	Filing Action
Quarter 4 (10/01/2007-12/31/2007)	02/14/2008	Not Submitted				[Create Filing]
Quarter 3 (07/01/2007-09/30/2007)	11/14/2007	Not Submitted				[Create Filing]
Quarter 2 (04/01/2007-06/30/2007)	08/14/2007	Submitted - Data	5/10/2008 4:07:04 PM	WITHIN RANGE	[View]	[Resubmit Filing]
Quarter 1 (01/01/2007-03/31/2007)	05/15/2007	Submitted - Data	5/10/2008 4:04:03 PM	WITHIN RANGE	[View]	[Resubmit Filing]

Monthly Reporting Period Filings  
 Periodic Reporting Period Filings

3. Click the View hyperlink to open the *Filing History* screen.

A table displaying all the filings for the specific reporting period is shown on the *Filing History* screen. To view the contents of a filing record, select the Submitted-Data hyperlink in the Filing Status field.

Filing History				
XYZ INSURANCE COMPANY				
Filing Type: QUARTERLY				
Reporting Period: Quarter 1 (01/01/2006-03/31/2006)				
Filing History				
Submission Date	Last Name	First Name	Username	Filing Status
<b>06/12/2008 02:03 PM</b>	<b>Allen</b>	<b>Julie</b>	<b>allenj@xyz.com</b>	<b>Submitted - Data</b>
06/12/2008 01:57 PM	Allen	Julie	allenj@xyz.com	Submitted - Data



The most current filing is considered the “Filing of Record” and will display in bold font in the Filing History table.

## Correspondence Procedures

Questions and comments for OIR may be submitted as correspondence via the QUASR<sup>ng</sup> application. Correspondence through the QUASR<sup>ng</sup> application are public information and are viewable by all persons/entities subscribed to a particular insurer.

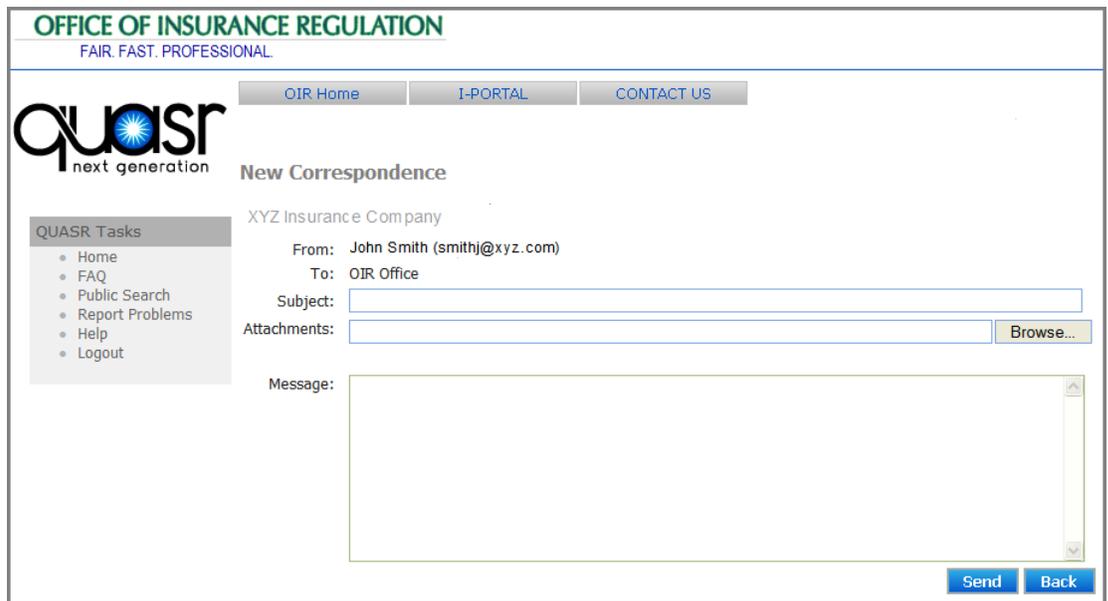
### 1.10 Initiate Correspondence

New correspondence is initiated from the *Insurer* screen. To send a correspondence message to OIR:

1. Access the *Insurer* screen of the insurer for which you are submitting the correspondence.

 All correspondence is associated with an insurer. If you are subscribed to multiple insurers and submit a correspondence from a specific insurer screen, the response from OIR will be sent to the insurer from which it was received.

2. Click Initiate Correspondence. The *New Correspondence* screen will display as shown below.



3. Complete the following required fields:

Subject

Message

4. (Optional Step) Attach a file to the correspondence by clicking the browse button to open the File Open dialogue box. Locate and select the file and click Ok. The attachment's file path will display below the textbox. If the wrong file is selected it may be deleted before sending by clicking the delete button next to the attachment's file path.

5. Click Send.

 Selecting the Back button returns you to the Insurer screen without sending the correspondence.

### 1.11 Reply to a Correspondence

You may reply to correspondence from OIR via the Correspondence Table on the *Insurer* screen. The system only allows one reply to each correspondence.

To reply to an OIR correspondence:

1. From the *Insurer* screen, click the Ref # in the Correspondence Table for the message to which you are responding. The *Correspondence* screen will display.
2. Click Reply. The *Reply Correspondence* screen similar to the one shown below will display.

3. Using the definitions for the correspondence fields below, enter the necessary information into the appropriate correspondence fields:

 The 'From' and 'To' fields of the correspondence cannot be modified. All correspondence are only between OIR and industry users.

Subject — this field displays the original correspondence subject. The information contained in this field may be modified before submitting to OIR. This is an optional field.

Attachments — this is an optional field that allows you to add a file as an attachment to the correspondence. Attach a file to the correspondence by clicking the browse button to open the File Open dialogue box. Locate and select the file to attach and click Ok. The attachment’s file path will display in the textbox.

Message — this field contains the text of the original correspondence and is where you enter the message response. This field is required.

4. Click Send.

### 1.12 Search and View Historical Correspondence

Unread messages sent from OIR to a particular insurer are displayed in the Correspondence Table on the respective *Insurer* screen. Once a message is read, it is removed from the table but is stored as a historical correspondence in the system.

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OIR Home I-PORTAL CONTACT US

**View Correspondence History**

XYZ Insurance Company

**Search Correspondence**

Received Date From: 11/20/2007 Received Date To: 05/20/2008

Reference ID:

Recipient/Sender:

Search Back

**Correspondence Received from OIR:**

	Ref#	Received	Subject	Last Name	First Name	Recipient
✉	1131	5/11/2008 4:04:04 PM	QUASRng Submission Error	User	OIR	OIR@DFS.com

**Correspondence Sent to OIR:**

	Ref#	Sent	Subject	Last Name	First Name	Sender
✉	1207	5/16/2008 2:55:12 PM	Quarter 3 Data Filing	Smith	John	smithj@xyz.com

Initiate Correspondence

Historical correspondence can be retrieved using the *View Correspondence History* screen. To search for and view a correspondence for a particular insurer:

1. Log in to QUASR<sup>ng</sup>.
2. Select the link of the Insurer for which you wish to view correspondence history.

3. Click View Correspondence.

 By default, the screen displays correspondence from the past six months.

4. Using the search fields provided, enter any combination of search criteria.

The system utilizes an 'Exact Match' search method for searches based on Reference Numbers and Recipient/Sender. The table below shows the acceptable data types for search criteria.

Field	Data Requirements
'From' Date Field	mm/dd/yyyy
'To' Date Field	mm/dd/yyyy
Reference Number Field	numeric
Recipient/Sender Field	Iportal e-mail address

5. Click Search.

Correspondence matching the provided search criteria will display in the Correspondence Received from OIR table and/or the Correspondence Sent to OIR table.

6. Click the Ref # of the correspondence you wish to view.



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**Correspondence**  
**XYZ Insurance Company**

**QUASR Tasks**  

- Home
- FAQ
- Public Search
- Report Problems
- Help
- Logout

**Status:** Open  
**From:** John Smith (smithj@xyz.com)  
**To:** OIR Office  
**Sent:** 05/16/2008 03:57 PM  
**Ref#:** 1062  
**Subject:** RE: QUASRng Submission Error

**Attachments:**  
**Message:**

```

=====
From: OIR Office
Sent: 05/16/2008 03:24 PM
Ref#: 1058

Please review the list of errors below, correct as needed, and resubmit
the filing.
Company: Unknown
Resubmitting Period End Date: 3/31/2006
    
```

7. Once you have viewed/printed the correspondence, click Back to return to the *View Correspondence History* screen.

## Reports

There are two tools to access public reports in QUASRng. The first tool is a set of screens that walks the user thru the report creation process. The first of these screens, the *QUASRng Public Report Page* appears when the user first accesses the web site. The second tool may be accessed by clicking the Database Interface link on the bottom left hand side of the initial *QUASRng Public Report Page*. Both of these tools allow the user to access the same information and create the same reports. The first tool is more user friendly. The second tool, the Database Interface which leads to the *Public Search Page*, is described below.

The *Public Search Page* provides a robust search tool that allows users to generate four customizable reports based on QUASR<sup>ng</sup> data filings. Specifically, the four reports provide information on market share, submissions, submission summaries, and QSR totals.

Additional reports are sometimes created by OIR and posted for public viewing. When this occurs, the report name will be shown as a hyperlink on the *Public Search Page* directly below the QUASR Task Bar. These reports will remain available until removed by OIR.

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**Welcome to the QUASRng Public Search Page**

Please Select the Criteria to be included in Your Search:

Report Type  
 Market Share  
 Submission  
 Submission Summary  
 QSR Total

Display Top  % of Insurer(s)

Order By

**QUASR Tasks**

- Home
- FAQ
- Public Search
- Report Problems
- Help
- Logout

**Reports**

Market 20%  
MarketShare 20#

Filing Type:

Filing Year:

Select Reporting Period(s):

Select Insurer(s):

### 1.13 Report Criteria

To generate any of the four reports, search criteria must be provided. Each of the reports utilizes specific criteria to generate results that display in the report. The criteria fields used in generating the reports are defined below.

**Report Type** — identifies the type of report that the system will generate.

**Display Top** — Applies only to the Market Share Report. This criterion field is used to limit the number of records returned in the report by identifying the top percent or top number of records that the system shall display. This is an optional field-if left blank the system will return all matching records.

**Order by** — Applies only to the Market Share Report. This criterion field displays a list of column headings that display in the report and is used to sort the report by a specific column. The report will sort in descending order by the selected column heading.

**Filing Type** — dropdown list containing the three filings types: Quarterly, Monthly, and Periodic. This field is used as a filter for displaying the options in the Reporting Period criterion field. This is a mandatory field

**Filing Year** — dropdown list containing all years for which data filings have been submitted. This field is used to filter the options that display in the Reporting Period field. This is a mandatory field

**Select Reporting Period** — list of reporting periods that match the selections made in the Filing Type and Filing Year fields. One or many reporting periods may be selected and used as criteria in generating a report. This is a mandatory field



Reports can only be executed for reporting periods in which OIR has released data for reporting. If a specific reporting period is not shown in this field, the data for the reporting period have not been released.

**Select Insurer** — list of insurers for which data filings have been submitted for the selected Filing Type, and Reporting Period. One or many insurers may be selected and used as criteria in generating a report. This is a mandatory field.

**Select Policy Type** — list of all the policy types established in the system. One or many policy types may be selected and used as criteria in generating a report. Policy Type definitions are provided by clicking the notepad icon next to this field. This is a mandatory field.

**Select County(ies)** — list of counties for which data filings have been submitted for the selected Filing Type, Reporting Period, and Insurer(s). One or many counties may be selected and used as criteria in generating a report. This is a mandatory field.

Select Data Elements — list of data fields that will display in the produced report. The table shown below defines each of the data element fields. One or many data elements may be selected and used as criteria in generating a report. This is a mandatory field.

Data Elements	Description
Policies in Force	The number of policies in force for the selected reporting period.
Total \$ Value of Exposure for Policies in Force that Include Wind Coverage	The dollar value of the structure exposure that includes wind coverage.
Number of Policies Canceled	The number of policies canceled.
Number of Policies Nonrenewed	The number of policies not renewed.
Number of Policies Canceled Due to Hurricane Risk	The number of policies that were canceled due to hurricane risk.
Number of Policies Nonrenewed Due to Hurricane Risk	The number of policies that were non-renewed due to the hurricane risk
Number of New Policies Written	The number of new policies written for the selected reporting period.
Policies in Force that Exclude Wind Coverage	The number of policies that exclude wind coverage
Policies in Force that Include Wind Coverage	The number of policies including wind coverage
Total \$ Value of Exposure for Policies in Force that Exclude Wind Coverage	The dollar value of the structure exposure under policies that exclude wind coverage
Direct Premium Written for Policies in Force that Include Wind Coverage	The dollar value of premiums including wind coverage
Direct Premium Written for Policies in Force that Exclude Wind Coverage	The dollar value of premiums excluding wind coverage
Number of Policies Transferred to Other Insurers	The number of Policies that were transferred to other Insurers

Data Elements	Description
Number of Policies Received from Other Insurers	The number of policies that were received from other Insurers.

### 1.14 Market Share Report

The Market Share Report displays the top companies ranked by the percentage or number of Policies in Force held by each insurer. Market Share reports display the top percent or top number of insurers with the greatest policies in force. There are two calculated totals in this report: Query Total and Grand Total.

Query Total is defined as the total for all insurers appearing in the report. This is NOT the total for all insurers selected in the report criteria.

Grand Total is defined as the total for all insurers included in the search criteria. This will be the sum for all insurers selected in the report criteria

### 1.15 Submission Report

The Submission Report allows users to view the QUASR data submitted by selected insurer(s). The report displays submitted data by insurer and county.

### 1.16 Submission Summary Report

The Submission Summary Report provides summary statistics on all data elements for selected insurer(s). The Submission Summary Report differs from the Submission Report in that county data is aggregated for each insurer. The Submission Summary Report displays data by insurer.

### 1.17 QSR Totals Report

The QSR Totals Report provides summary statistics for all policy types and data elements for the selected reporting period. The report summarizes submission data by policy type for all insurers selected in the report criteria.

### 1.18 Generating a New Report

Reports are generated from customized queries. Query criteria are established by the user and reports are generated using the information provided. To run a new report for any of the four report types:

1. Log in to the QUASR<sup>ng</sup> application. Refer to the section on [Accessing QUASR<sup>ng</sup>](#) for information on logging into the application.
2. Click Public Search on the taskbar. The *Public Search Page* will display.
3. Select the radio button to the left of the report type you would like to generate.

4. (Optional Step—Is only applicable to the Market Share Report) In the field next to 'Display Top', enter the number of records you would like to display in the report. To display a top percentage of insurers, enter a value between 1 - 100 and then select the % sign from the drop-down list box.



If you do not enter anything in this field, the report will display all records.

5. (Optional Step—Is only applicable to the Market Share Report) Using the Order By drop-down list select a field by which to sort the information displayed in the report.
6. Select a filing type from the Filing Type drop-down list box.
7. Select a year from the Filing Year drop-down list box.
8. Using the selection control, select one, many, or all of the reporting periods.

To “select” one item, click .

To “select” all items in the Available Items field, click .

To remove all items and place them back into the Available Items list, click .

To select more than one item, select each item while holding down the Ctrl key on your keypad.

9. Repeat step 8 for each of the following required fields: insurer, policy type, county, and data elements fields.



The system filters data based on the selections made in each field. As you make selections in each field, data in subsequent fields will filter based on the selections that are made.

10. Click Run Report. The report will open in a new browser window.



Reports display in a separate browser window. If the report does not open, ensure that you do not have pop-ups disabled in your browser settings.

## Appendix A: Glossary

The following common terms, abbreviations, and acronyms are used throughout the User Guide.

<b>A</b>	
<i>Admitted Market</i>	The market from which OIR collects QUASR data.
<i>Aggregate Report</i>	A report that combines information submitted by more than one company that is compiled for statistical analysis. Aggregate reports cannot be generated in the system until an Administrator makes the determination in QUASR <sup>ng</sup> that filings have been received for a given reporting period from enough companies to make the reports valid.
<i>Apartment Buildings</i>	A commercial residential property policy covering a structure, or part of a structure, that is rented by people for use as a residence.
<b>B</b>	
<b>C</b>	
<i>Certificate of Authority</i>	An authorization issued by the Office of Insurance Regulation allowing an insurer to write policies.
<i>Commercial Lines Residential Property Policies</i>	A commercial residential insurance purchased by commercial entities for apartment buildings, condominium associations, and homeowners associations.
<i>Commercial Residential – Allied Lines (Condo Associations Only)</i>	Coverages which are generally written with property insurance, e.g., glass, tornado, windstorm and hail; sprinkler and water damage; explosion, riot, and civil commotion; growing crops; flood; rain; and damage from aircraft and vehicle, etc.
<i>Commercial Residential – Allied Lines (Excl Condo Associations)</i>	Coverages which are generally written with property insurance, e.g., glass, tornado, windstorm and hail; sprinkler and water damage; explosion, riot, and civil commotion; growing crops; flood; rain; and damage from aircraft and vehicle, etc.

<p><i>Commercial Residential – CMP (Condo Associations Only)</i></p>	<p>A contract for a commercial enterprise, which packages two or more insurance coverages protecting an enterprise from various property and liability, risk exposures. Frequently includes fire, allied lines, various other coverages (e.g., difference in conditions) and liability coverage (such coverages would be included in other annual statement lines, if written individually). Include multi-peril policies (other than farmowners, homeowners and automobile policies) that include coverage fro liability other than auto.</p>
<p><i>Commercial Residential – CMP (Excl Condo Associations)</i></p>	<p>A contract for a commercial enterprise, which packages two or more insurance coverages protecting an enterprise from various property and liability, risk exposures. Frequently includes fire, allied lines, various other coverages (e.g., difference in conditions) and liability coverage (such coverages would be included in other annual statement lines, if written individually). Include multi-peril policies (other than farmowners, homeowners and automobile policies) that include coverage fro liability other than auto.</p>
<p><i>Commercial Residential – Dwelling/Fire (Condo Associations Only)</i></p>	<p>Coverage protecting the insured against the loss to real or personal property from damage caused by the peril of fire or lightning, including business interruption, loss of rents, etc.</p>
<p><i>Commercial Residential – Dwelling/Fire (Excl Condo Associations)</i></p>	<p>Coverage protecting the insured against the loss to real or personal property from damage caused by the peril of fire or lightning, including business interruption, loss of rents, etc.</p>
<p><i>Cancellation</i></p>	<p>Occurs when either policyholder or insurer decides to stop coverage during the policy term before the expiration date of the policy</p>
<p><i>Citizens</i></p>	<p>Citizens Property Insurance Corporation</p>
<p><i>Condominium</i></p>	<p>A form of ownership of real property comprised of units that may be owned by one or more persons, in which there is, appurtenant to each unit, an individual share in common elements.</p>
<p><i>Condominium Association</i></p>	<p>A commercial residential property policy covering property in which condominium unit owners have use rights. Unit owner membership in the entity is composed exclusively of condominium unit owners or their elected or appointed representatives. Membership in the entity is a required condition of unit ownership.</p>

<i>Condominium Unit Owners</i>	A personal residential property policy covering a condominium or cooperative unit used exclusively for residential purposes.
<i>Contact</i>	The person identified as the primary contact regarding a QSR submission.
<i>COREN</i>	Also, CORE; Companies and Related Entities; A central internal database where company and related entity information is stored.
<b>D</b>	
<i>Data Submission</i>	A report that includes statistical data for the reporting period; a data report or a data submission.
<i>DFS</i>	Department of Financial Services
<i>Dwelling, Fire and Allied Lines</i>	A personal residential property policy covering the dwelling and personal property of individuals and families against fire and other peril. All dwelling, fire and allied coverage should be reflected in this category, including condominium units and mobile homes.
<b>E</b>	
<i>EXP</i>	Average Structure Exposure reasonability check.
<b>F</b>	
<i>Farm</i>	A farm is defined as the land, buildings, support facilities, machinery, and other appurtenances used in the production of farm or aquaculture products.
<i>Farmowners</i>	A personal residential property policy covering an owner-occupied farm. Farmowners should be reported if the policy covers at least one of the following: dwelling, other private structures appurtenant to the dwelling, household private property, or loss of use including coverage for additional living expenses. Farmowners should not be reported if the policy covers scheduled farm personal property, farm personal property on a blanket basis, or other farm structures including barns, silos and fences.
<i>FSLSO</i>	Florida Surplus Lines Service Office
<b>G</b>	

<b>H</b>	
<i>Homeowners</i>	A personal residential property policy covering a dwelling used exclusively for residential purposes.
<i>Homeowner’s Association</i>	A commercial residential property policy covering the common areas within a residential community.
<i>Hurricane Risk</i>	Policies that are canceled by the insurer for the purpose of reducing exposure to hurricane claims.
<b>I</b>	
<i>Iportal</i>	Industry Portal; a web-based application used by the regulated community to access Department applications and information.
<b>J</b>	
<b>K</b>	
<b>L</b>	
<i>Line of Business (LOB)</i>	<p>A line of business (LOB) signifies a group of related products offered by an insurer, as defined by the NAIC. The lines of business that are tracked within QUASR are:</p> <ul style="list-style-type: none"> <li>• Fire</li> <li>• Allied Lines</li> <li>• Homeowners Multiple Peril</li> <li>• Mobile Homeowners</li> <li>• Farmowners</li> <li>• Commercial Multiple Peril</li> </ul>
<b>M</b>	
<i>Market Share</i>	The number of company/group PIF divided by the industry PIF.
<i>Mobile Home</i>	A structure, transportable in one or more sections, which is eight body feet or more in width and which is built on an integral chassis and designed to be used as a dwelling when connected to the required utilities and includes the plumbing, heating, air-conditioning, and electrical systems contained therein.

<i>Mobile Homeowners</i>	A personal residential property policy covering a mobile home used exclusively for residential purposes.
<b>N</b>	
<i>National Association of Insurance Commissioners (NAIC)</i>	The organization of insurance regulators from the 50 states, the District of Columbia, and the five U.S. territories. The NAIC provides a forum for the development of uniform policy when uniformity is appropriate.
<i>New Policies Written</i>	A policy where (1) the risk was not previously insured by the current insurer, (2) the policy coverage has materially changed from the previous coverage, or (3) policy coverage is extended to the same policyholder responsible for causing the previous policy to lapse.
<i>No data</i>	A report filing that does not include any statistical data for the reporting period; a no data report or a no data submission.
<b>O</b>	
<i>OIR</i>	Office of Insurance Regulation
<b>P</b>	
<i>Personal Lines Residential Property Policies</i>	Personal residential lines insurance purchased by non-commercial entities covering (1) homeowners, (2) farm owners, (3) mobile homeowners, (4) condominium unit owners, (5) dwelling, fire and allied lines, and (6) tenants.
<i>Personal Residential – Allied Lines</i>	Coverages which are generally written with property insurance, e.g., glass, tornado, windstorm and hail; sprinkler and water damage; explosion, riot, and civil commotion; growing crops; flood; rain; and damage from aircraft and vehicle, etc.
<i>Personal Residential - Condominium Unit Owners</i>	Homeowners insurance sold to condominium owners occupying the described property.
<i>Personal Residential – Dwelling/Fire</i>	Coverage protecting the insured against the loss to real or personal property from damage caused by the peril of fire or lightning, including business interruption, loss of rents, etc.

<i>Personal Residential - Farmowners</i>	A package policy for farming and ranching risks, similar to a homeowners policy that has been adopted for farms and ranches and includes both property and liability coverages for personal and business losses. Coverages include farm dwellings and their contents, barns, stables, other farm structures and farm inland marine, such as mobile equipment and livestock.
<i>Personal Residential – Homeowners (Excl Tenant and Condo) – Owner Occupied</i>	A package policy combining broad property coverage for the personal property and/or structure with broad personal liability coverage. Coverage applicable to the dwelling, appurtenant structures, unscheduled personal property and additional living expenses are typical.
<i>Personal Residential – Mobile Homeowners</i>	A package policy combining broad property coverage for the personal property and/or structure with broad personal liability coverage. Coverage applicable to the dwelling, appurtenant structures, unscheduled personal property and additional living expenses are typical. Includes mobile homes at a fixed location.
<i>Personal Residential - Tenants</i>	Homeowners insurance sold to tenants occupying the described property.
<i>PIF Status</i>	A status given to a filing for a given reporting period indicating whether the PIF validation is within the allowable range. A given report may have a PIF status of either “within range” or “out of range.”
<i>(Policies) Canceled</i>	Policies in which either the policyholder or the insurer decides to stop coverage before the expiration date of the policy. All policies transferred to other corporations, including subsidiaries with a separate book of business, should be reported as canceled.
<i>(Policies) In Force</i>	The number of policies including policies assumed through Citizens Property Insurance Corporation that are in force through the last day of the reporting period. Also known as PIF.
<i>(Policies) Non-Renewed</i>	Occurs when the policy expires and either the policyholder or the insurer decides not to continue the same coverage. This does not include policies canceled.
<i>Policy</i>	A contract for coverage.
<i>Policy Number</i>	An alpha/numeric designation assigned by the insurer to a given policy.

<i>Policy Type (QSR)</i>	The categories of insurance on a given structure and/or contents. QSR defines policy types as (1) homeowners, (2) farmowners, (3) mobile homeowners, (4) condo unit owners, (5) dwelling, fire and allied lines, (6) tenants, (7) apartment buildings, (8) condo associations, and (9) homeowner associations.
<i>PRM</i>	Average Premium Written reasonability check.
<i>Product</i>	A product is a specific type of policy created by an insurer. An insurer may create several products within a line of business.
<i>Project Management Office (PMO)</i>	A unit within the Division of Information Systems that provides support for agency technology projects; also known a PMO.
<b>Q</b>	
<i>QSR</i>	Quarterly Supplement Report. An electronic submission that contains nine statistics, for thirteen policy types, for 67 counties, for each of three months, for a given quarter, for a given insurer.
<i>Quarter</i>	Period of three months ending on any of these dates: March 31st, June 30th, September 30th, or December 31st.
<i>QUASR</i>	The software an insurer uses to submit QSRs to OIR.
<i>QUASR Account</i>	The account of an IPORTAL user logged into the QUASR system. An IPORTAL account is required to access QUASR; the QUASR account is not a separate account; however it is a term that will be used to designate the conceptual difference between the IPORTAL account itself and the IPORTAL user logged into the QUASR system.
<i>QUASR Filing</i>	The QUASR filing is the “data” or “no data” submission filed by a company for each reporting period.
<b>R</b>	
<i>Reporting Deadline</i>	45 days after the end of a given quarter, except for the fourth quarter which has a deadline of March 1st.
<i>Reporting Period</i>	The reporting period is the designated event for companies to submit their QUASR filings. The following reporting periods have been identified: Quarterly, Monthly, and Periodic.

<i>Requirements</i>	Conditions or capabilities to which a system or service must conform. Requirements can be derived from documented user needs, from a contract, standards or specifications.
<i>Resubmission</i>	A report filing for which a report has already been submitted. The resubmission is intended to replace the original submission.
<b>S</b>	
<i>Statistics</i>	Data attributes for the policy types. Statistics include number of policies in force, number of policies canceled, number of policies non-renewed, number of policies canceled due to hurricane risk, number of policies non-renewed due to hurricane risk, number of new policies written, number of policies that exclude wind coverage, total dollar value of structure exposure under policies that include wind coverage, and total premium written. These statistics are collected by policy, by month, by county and by company for a given reporting period.
<i>Structure Exposure</i>	For personal lines residential policies, total dollar coverage amount for structure, appurtenant structures contents and loss of use. For commercial lines residential policies, total dollar coverage amount for structures and contents.
<i>Submission</i>	The QUASR filing for one insurer.
<b>T</b>	
<i>Tenants</i>	A personal residential property policy covering a dwelling or apartment.
<i>Total Premiums Written</i>	The dollar amount of premiums written for all policies in force.
<b>U</b>	
<i>Unaffiliated Companies</i>	Insurance companies without a group code or a group code equal to '0000'.
<b>V</b>	
<i>Validation Phase</i>	Period during QUASR import when the system determines if the data is suitable for the storage phase.
<b>W</b>	
<i>Wind Coverage</i>	Insurance coverage for the perils of windstorm.

<b>X</b>	
<b>Y</b>	
<b>Z</b>	

## Appendix B: Common Data Formatting Considerations

Data filings submitted through QUASR<sup>ng</sup>, must meet specific data formatting requirements. If any of the requirements are violated the data filing will be returned for re-submission. All data filing validation checks performed by the system are documented in the table below.

Formatting Validations	Definition
Missing or Misspelled Column Headings	Column headings must match exactly with column headings provided in the Excel submission template for the respective filing type (Quarterly, Monthly, Periodic).
Period End Date	The end date provided in the spreadsheet must be a valid date that matches the period end date for the filing selected.
Missing or Invalid Month Number (quarterly reporting)	Only the values 1, 2, or 3 should be used to specify a month in quarterly filings. This column must be defined as numeric in the Excel spreadsheet.  The “Month in Quarter” column should not be included in a monthly or periodic filing.
Unique Month (quarterly reporting)	The month of each quarter must be unique for each County and Policy Type.
Missing or Invalid PIF Number	PIF numbers must be numeric.
Missing FEIN	A valid FEIN must be provided in the spreadsheet and must match that of the selected insurer. This field should be defined as text so that the entire number remains in the field.
Invalid County/Policy	Each County/Policy combination must be unique.
Blank County Name	County name cannot be blank
Invalid County Name	County names must match valid counties in Florida.
Blank Policy Name	Policy names cannot be blank.

The Policy Name specified could not be matched in the database.	The Policy Name must be a valid Policy Type. The valid QUASRng Policy Types are listed below.
	Personal Residential - Tenants
	Personal Residential - Homeowners (Excl Tenant and Condo) - Owner Occupied
	Personal Residential - Farmowners
	Personal Residential - Mobile Homeowners
	Personal Residential - Allied Lines
	Personal Residential - Condominium Unit Owners
	Personal Residential - Dwelling/Fire
	Commercial Residential - Dwelling/Fire (Condo Associations Only)
	Commercial Residential - Allied Lines (Condo Associations Only)
	Commercial Residential - CMP (Condo Associations Only)
	Commercial Residential - Dwelling/Fire (Excl Condo Associations)
	Commercial Residential - Allied Lines (Excl Condo Associations)
	Commercial Residential - CMP (Excl Condo Associations)

<b>Data Validations</b>	
If PIF is greater than zero, then the PIF Including Wind plus PIF Excluding Wind must be greater than zero.	
The sum of the PIF Including Wind and Excluding Wind must equal PIF	

If PIF is being reported, then the premium and exposure for those policies must be reported.
If the PIF Including Wind is greater than zero, then the Premium Including Wind must be greater than zero.
If the PIF Excluding Wind is greater than zero, then the Premium Excluding Wind must be greater than zero.
If the PIF Including Wind is greater than zero, then the Exposure Including Wind must be greater than zero.
If the PIF Excluding Wind is greater than zero, then the Exposure Excluding Wind must be greater than zero.
If the number of Canceled Policies Due to Hurricane Risk is greater than zero, then the number of Canceled Policies must be greater than zero.
If the number of Non-Renewed Policies Due to Hurricane Risk is greater than zero, then the number of Non-Renewed Policies must be greater than zero.
The number of New Policies must not be greater than the number of PIF.

## Appendix C: Web Services Property Definitions

The following are the property definitions for the user supplied input when submitting data filings via the QUASR<sup>ng</sup> Web Service.

Property Name	Type	Description
<b>Submission Object</b>		
UserName	String	The username of a registered QUASR <sup>ng</sup> user.
Password	String	The password of a registered QUASR <sup>ng</sup> user.
StartDate	DateTime	The beginning date of the reporting period.
EndDate	DateTime	The end date of the reporting period.
FEIN	String	The FEIN number of the insurer.
InsurerName	String	The name of the insurer.
ReportingPeriodType	String	Quarterly, Monthly, or Periodic
<b>Submission Detail Object (may be repeated multiple times)</b>		
Month	Integer	Used to indicate the month for a quarterly filing. Acceptable values are 1,2, and 3. (For Quarterly filings, you will need 3 submission detail objects— 1 for each month in the quarter)
CountyName	String	The name of the county included in the data filing. (For data submissions involving multiple counties, you will need multiple submission detail objects)

<b>Property Name</b>	<b>Type</b>	<b>Description</b>
InForce	Integer	Number of policies in Force
Canceled	Integer	Number of policies canceled
ExcludeWindCoverage	Integer	Number of policies that exclude wind coverage
IncludeWindCoverage	Integer	Number of policies that include wind coverage
NonRenewed	Integer	Number of policies that were nonrenewed
CancelledforHurricaneRisk	Integer	Number of policies that were cancelled due to hurricane risk.
NumberNew	Integer	Number of new policies written
NonRenewedForHurricaneRisk	Integer	The number of policies that were nonrenewed due to hurricane risk.
TotalPremiumExcludingWind	Decimal	Dollar value of all premiums that exclude wind coverage.
TotalPremiumIncludingWind	Decimal	Dollar value of all premiums that include wind coverage.
TotalPremiumsWritten	Decimal	Dollar value of all premiums written at the end of each month.
TotalStructureValueExcludingWind	Decimal	The dollar value of the structure exposure under policies that exclude wind coverage
TotalStructureValueIncludingWind	Decimal	The dollar value of the structure exposure under policies that include wind coverage

<b>Property Name</b>	<b>Type</b>	<b>Description</b>
BooksofBusinessReceived	Integer	The total number of new policies received at the end of each month.
BooksofBusinessTransferred	Integer	The total number of policies transferred at the end of each month.
PolicyTypeName	String	Name of the policy type for which data are reported.

## Appendix D: PIF Calculation

The QUASR system validates PIF values for accuracy between each quarterly and monthly filing. The validation check considers policies cancelled, non-renewed or transferred and new policies written. This calculation is then compared to the previous submission. The system will validate that the PIF calculation falls within the acceptable percentage threshold allowed for that particular filing period. The formula used to derive this is shown below.

**Step 1** – Determine the **Policy Difference** or the number of policies that have changed between the previous submission and the current submission using the following for quarterly data. If the data is monthly simply use the current month and the previous month for the respective month 3 data.

**Policy Difference** =

**Current Submission Month 3 PIF Total** – **Previous Submission Month 3 PIF Total**

**Step 2** - Calculate the **Current PIF Change** or the number of policies that have changed for the current submission. Use values from each County, Policy Type and Month. For quarterly submissions this is a total for all values reported not just Month 3 values.

**Current PIF Change** = **New Policies Total**  
 + **Books of Business Received Total**  
 - **Cancelled Policies Total**  
 - **Non-Renewed Policies Total**  
 - **Books of Business Transferred Total**

**Step 3** – Calculate the **Policies Off** or the number of policies that are off between what was reported as the PIF total and what was reported in the breakdown of the PIFs.

**Policies Off** = | **Policy Difference** – **Current PIF Change** |

**Step 4** – Calculate the **PIF percentage for the Current Submission**.

**PIF percentage for the Current Submission** =  
 (**Policies Off** / ( | **Policy Difference** | )) \* 100

The system performs the above calculation to determine whether the current PIF will be deemed ‘Out of Range’. If the percent derived from the calculation is greater than the percent allowed for the reporting period, the PIF will be “Out of Range”.

Note: If **Policy Difference** = 0 and the number of **Policies Off** > 0 the submission is automatically deemed ‘Out of Range’.

**Example with Number Values:****Step 1****Policy Difference =****Current Submission Month 3 PIF Total – Previous Submission Month 3 PIF Total**

$$1500 - 1100$$

$$= \underline{400}$$

**Step 2**

<b>Current PIF Change = New Policies Total</b>	<b>400</b>
<b>+ Books of Business Received Total</b>	<b>+ 300</b>
<b>- Cancelled Policies Total</b>	<b>- 50</b>
<b>- Non-Renewed Policies Total</b>	<b>- 50</b>
<b>- Books of Business Transferred Total</b>	<b><u>- 100</u></b>
<b>= The Current PIF Change</b>	<b>500</b>

**Step 3****Policies Off = | Policy Difference – Current PIF Change |**

$$100 = | 400 - 500 |$$

**Step 4****PIF percentage for the Current Submission =**

$$(\text{Policies Off} / (|\text{Policy Difference}|)) * 100$$

$$(100 / (|400|)) * 100$$

$$= \underline{25\%}$$

**(This is the percentage that will be matched against the percentage allowed for the reporting period)****If this percentage is greater than the percentage allowed for the reporting period, the filing will be deemed “Out of Range”.**

### Appendix E: Policy Type conversion from QUASR to QUASR<sup>ng</sup>

<b>Current QUASR Reporting Categories</b>	<b>QUASR NG Reporting Categories</b>
Homeowners (Excl. Tenant and Condo)	Personal Residential – Homeowners (Excl Tenant and Condo) - Owner Occupied
Farmowners	Personal Residential – Farmowners
Mobile Homeowners	Personal Residential - Mobile Homeowners
WindOnly Mobile Homeowners	Personal Residential – Mobile Homeowners
Condominium Unit Owners	Personal Residential – Condominium Unit Owners
WindOnly Condominium Unit Owners	Personal Residential – Condominium Unit Owners
Dwelling, Fire and Allied Lines	Personal Residential - Dwelling/Fire Personal Residential – Allied Lines
Tenants	Personal Residential - Tenants
WindOnly Tenants	Personal Residential – Tenants
<b>Current QUASR Reporting Categories</b>	<b>QUASR NG Reporting Categories</b>
Condominium Association	Commercial Residential – Dwelling/Fire (Condo Associations Only)
	Commercial Residential - Allied Lines (Condo Association Only)
	Commercial Residential – CMP (Condo Associations Only)
WindOnly Condominium Association	Commercial Residential - Allied Lines (Condo Association Only)
Homeowners Association and Apartment Buildings	Commercial Residential - Dwelling/Fire (Excl Condo Associations)
	Commercial Residential – Allied Lines (Excl Condo Associations)
	Commercial Residential – CMP (Excl Condo Associations)
WindOnly Homeowners Association	Commercial Residential – Allied Lines (Excl Condo Associations)
WindOnly Apartment Buildings	Commercial Residential – Allied Lines (Excl Condo Associations)
WindOnly Dwellings	Personal Residential – Allied Lines