

Surplus Lines Online User Guide

Missouri Department of Commerce and Insurance

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Summary

The current year Appendix 1 and Appendix 3 are submitted online through DCI Surplus Lines Web Portal. This tutorial guides users through the online system for account creation, account management, and submission of the filings.

Site Address:

<https://apps.dci.mo.gov/SurplusLinesFilings/Login.aspx>

Account Management

Users require an approved account to file Appendix 1 and Appendix 3 filings and maintain Surplus Lines Producer's information. New users must create an account and receive approval prior to creating filings. Existing users will need to sign in to manage Surplus Lines Producers information and create new filings.

Account Registration

Required Information: Users will need to provide the following information when registering for an account with DCI:

- Provide a valid Email Address
- Create a Password
- Provide the Agency Name
- Provide Contact Name
- Provide Contact Phone Number
- Provide Contact Address Information
- Provide all Producers Surplus Lines Numbers and Email Addresses users are responsible for

Registration Process

Users must register a MoLogin account to gain access to the application. Begin the account creation process by navigating to the Surplus Lines Online Filings portal located on the internet at

<https://apps.dci.mo.gov/SurplusLinesFilings/Login.aspx> .



Account Sign In

This app has moved to MoLogin authentication. Please click the Sign In button to redirect to MoLogin. The User Guide has been updated for MoLogin.

[Login/Register](#)

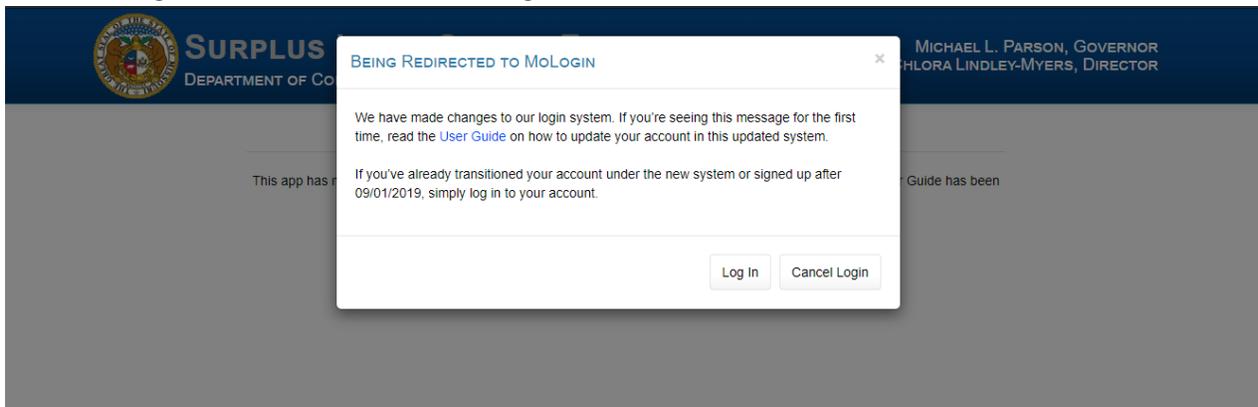
[User Guide](#)

[Contact Us](#)

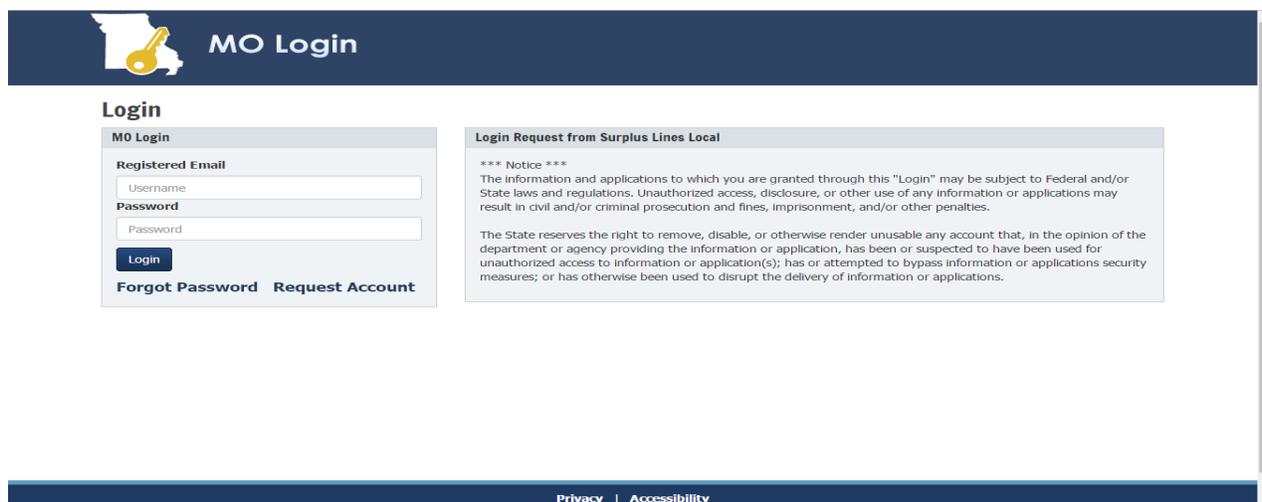
[Tax Remittance](#)

Once you navigate to the site, in the middle of the screen on the 'Sign In' page, click the button titled **Login/Register**. This will then pop up a box informing that you are being redirected to MoLogin.

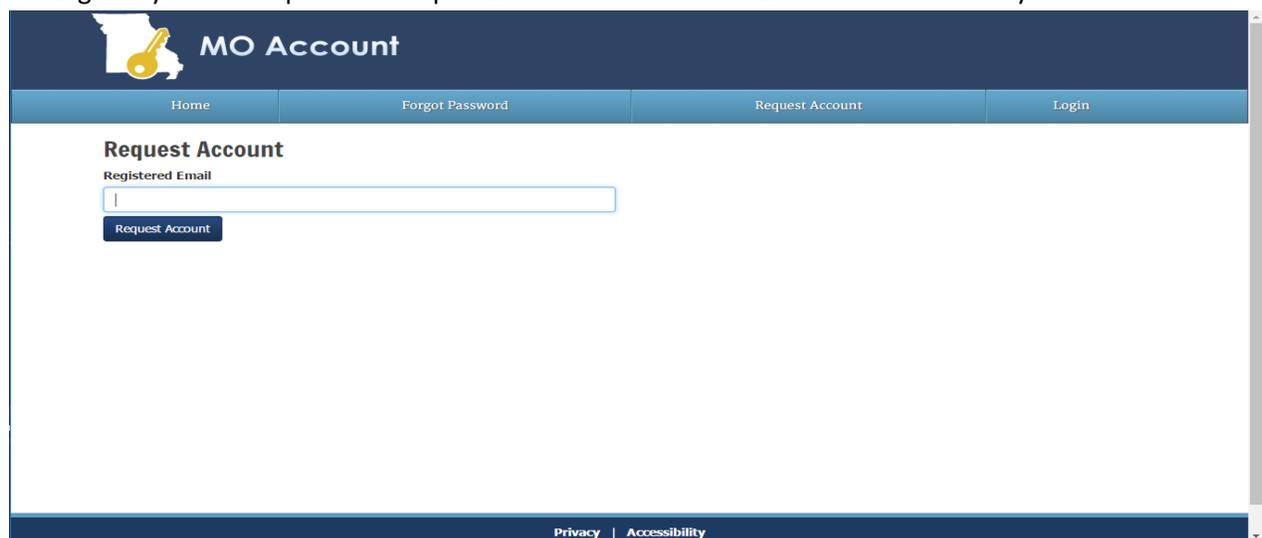
Click the Log In button to redirect to MoLogin.



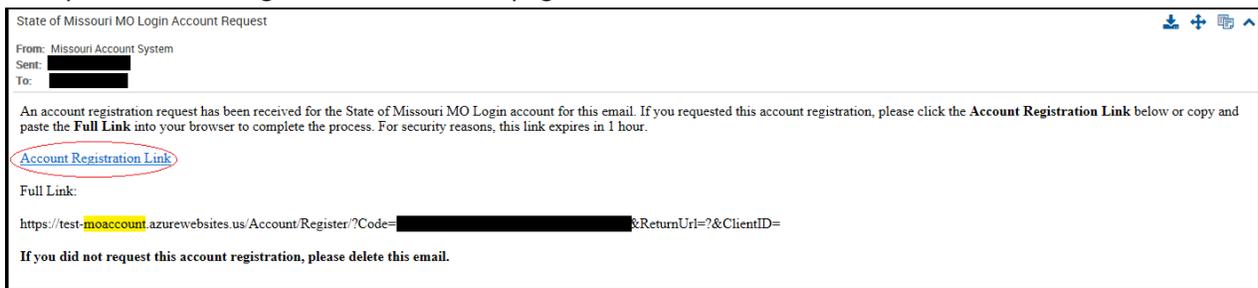
You will then be redirected to MoLogin. If you do not have a MoLogin Account, you will need to press the *Request Account* hyperlink.



When *Request Account* is clicked you will be asked for a Registered Email which will let you log in to MoLogin. If you have a previous Surplus Lines account use that Email so it can link to your account.



Once you click the Request Account button, an email will be sent to the Registered Email address from Missouri Account System. Click on the *Account Registration Link* hyperlink, or the Full Link, and it will take you to the MoLogin's Create Account page.



Fill out the form and press the *Create Account* button.

A "Create Account" form with the following fields: "First Name", "Middle Name", "Last Name", "Email", "Password", and "Confirm password". A "Create Account" button is located below the "Confirm password" field. To the right of the form is a "Password Rules" sidebar with a lock icon, containing the following rules:

- Must be at least 12 characters
- Must contain at least 3 of the following:
 1. Upper case character
 2. Lower case character
 3. Number
 4. Special character. Examples include !@#\$%^&*()_+~'`=[]{}|:;<>?.,/
- Must not be a recent password

At the bottom of the page, there are links for "Privacy" and "Accessibility".

Once this is completed go back to <https://apps.dci.mo.gov/SurplusLinesFilings/Login.aspx>. You will need to log off completely.

Login to MoLogin with the account you just created. If you had a previous account you will be redirected to the Portal Homepage. If you did not have a previous account, you will be redirected to the Account Information form.

Complete the information requested on the Account Information form:

Account Information

Please complete the fields below.
All fields are required.
If you already have an account, please click [Here](#).

Email:

Agency:

Contact Name:

Contact Phone:

Contact Address:

Contact City:

Contact State:

Contact Zip:

Surplus Lines Producers:

Surplus Lines Number	Producer Name	Producer Email Address (Producers direct email - not the account representative email)
<input type="checkbox"/> SL <input type="text"/>		

When this symbol appears, an error has occurred in the associated field, hover over symbol for error message.

Email: This field will stay the same as it is linked to MoLogin. After creating your account, you will receive emails pertaining to your account and claims.

Agency: Provide your agency name.

Contact Name: Enter the account contact name.

Contact Phone Number: Enter the primary phone number for the account in which you are registering.

Contact Street Address: In the text box provided, enter the street address for the account in which you are registering.

Contact City: Enter the name of the city for the account in which you are registering.

Contact State: From the drop down menu, select the state associated with the address provided above.

Contact Zip Code: Enter the zip code associated with the address provided above.

After you have entered all the requested information, click the **Register** button to continue with account creation. The depiction of a red 'x' next to a field indicates an error associated with field requirements. Follow prompts provided to correct online registration inconsistencies or errors.



After selecting the **Register** button, the webpage redirects to the *Registration Complete* page. You will also receive an email notification verifying your registration.



Registration Complete

Thank you for registering.
Please allow up to 72 hours for your registration to be processed.

[Back to Login](#)

It is important to note that processing registrations can take up to 72 hours before account approval. You will receive a confirmation email, once the account is accepted.

Account Login

To login, press the Login/Register button and a pop up will appear informing that you will be redirected to MoLogin.



Account Sign In

This app has moved to MoLogin authentication. Please click the Sign In button to redirect to MoLogin. The User Guide has been updated for MoLogin.

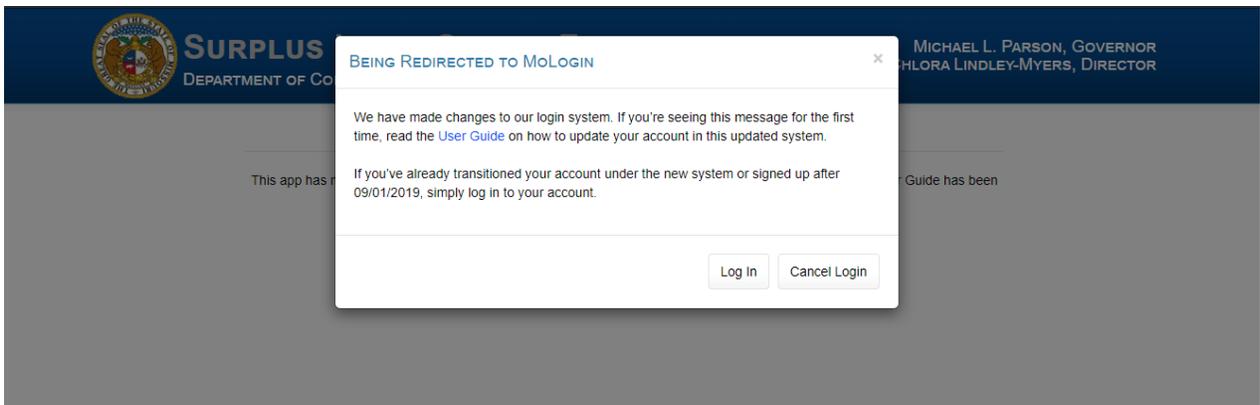
[Login/Register](#)

[User Guide](#)

[Contact Us](#)

[Tax Remittance](#)

Click Log In on the pop up to redirect to MoLogin.



Enter the Email and Password then press the Login button.

MO Login

Registered Email

Username

Password

Login

[Forgot Password](#) [Request Account](#)

Login Request from Surplus Lines Local

***** Notice *****

The information and applications to which you are granted through this "Login" may be subject to Federal and/or State laws and regulations. Unauthorized access, disclosure, or other use of any information or applications may result in civil and/or criminal prosecution and fines, imprisonment, and/or other penalties.

The State reserves the right to remove, disable, or otherwise render unusable any account that, in the opinion of the department or agency providing the information or application, has been or suspected to have been used for unauthorized access to information or application(s); has or attempted to bypass information or applications security measures; or has otherwise been used to disrupt the delivery of information or applications.

[Privacy](#) | [Accessibility](#)

Once you login, the page redirects to the portal homepage. From the portal homepage, you can navigate to your account settings; File Appendix 1, File Appendix 3, Print Data for this session; and get DCI contact information.

SURPLUS LINES ONLINE
FILINGS
DEPARTMENT OF COMMERCE AND INSURANCE

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CHLORA LINDLEY-MYERS, DIRECTOR

Welcome Test Account _Settings Sign_out

[Home](#) [File Appendix 1](#) [File Appendix 3](#) [Upload Appendix File](#) [Print Data for this session](#) [Help](#)

WELCOME

CURRENT YEAR SUBMISSIONS ONLY CAN BE SUBMITTED ON THE WEB PORTAL.
ALL PRIOR YEAR FILINGS MUST BE EMAILED TO SURPLUSLINES@INSURANCE.MO.GOV.
USE MENU OPTIONS TO CONTINUE.

DO NOT UPLOAD A FILE IF YOU SUBMIT AN ONLINE FORM FROM THE 'FILE APPENDIX 1' OR 'FILE APPENDIX 3' TAB.
PLEASE REMEMBER TO USE THE 'PRINT DATA FOR THIS SESSION' BUTTON TO PRINT DATA BEFORE LOGGING OUT.
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(FOR BEST RESULTS, CHOOSE LANDSCAPE PAPER ORIENTATION ON PRINT OPTIONS BEFORE PRINTING.)

TAX PAYMENTS

THE DEPARTMENT DOES NOT SEND OUT INVOICES, YOU ARE REQUIRED TO SUBMIT THE TAX AMOUNT YOUR ACCOUNTING RECORDS STATE YOU OWE. TAX RECONCILIATIONS ARE NOT GUARANTEED TO BE COMPLETED BY THE TAX DUE DATE.

Contact Information Updates

It is important to keep your contact information up-to-date, login into the account to manage account settings. You can change your password, email account, and contact information online through the account settings option. This is also where you will maintain the Surplus Lines Producers information. Their email addresses need to be kept current. If you are no longer responsible for making their filings, you will need to delete them from your account. If you need to add a producer, you will use the 'Add Producer' button and complete the information. The system automatically approves updates immediately but account changes process nightly.

From the homepage, navigate to Account Settings link at the top right of the page. The webpage redirects to the Account Settings pages.



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Complete any necessary changes. Once your changes are complete, click the Save button.



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Account Information

Please enter the information you wish to update.

Email:

Surplus Lines Producers:

	Surplus Lines Number	Producer Name	Producer Email Address (Producers direct email - not the account representative email)
<input type="checkbox"/> Delete	SL 9999999	PRODUCER, TEST	Email test@test.net
<input type="checkbox"/> Delete	SL		Email

Contact Information:

Contact Name:

Contact Phone Number:

Contact Address:

Contact City:

Contact State:

Contact Zip Code:

When this symbol appears, an error has occurred in the associated field, hover over symbol for error message.

Your changes will be saved and the page will redirect to a webpage confirming changes to your account. You will also receive an email notification, informing you that your account settings were successfully changed.



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Account Settings Saved

Your account settings have been saved.
[Back to Account Settings](#)

Appendix Filing



You will login to your account and select the appendix type at the top of the page you want to submit.

Appendix 1 Main Screen



Select the Licensee Number from the drop down you are submitting the filing for. The tax year, quarter and transaction type, original, supplement or No Business.

File Appendix 1 No Business



When filing No Business, you will select the Licensee Number from the drop down, the tax year, tax quarter and No Business as the transaction type. Hit Submit and Finish. You will then select Print Data for this Session.

File Appendix 1 Original



MISSOURI DEPARTMENT OF COMMERCE AND INSURANCE

Insured City:		
Insured State:	Select one	
Insured Zip Code:		
Insured Home State Street Address:		
Insured Home State City:		
Insured Home State:	Select MO	
Insured Home State Zip:		
Reason for Placement:		
<input type="button" value="Submit and Continue"/>	<input type="button" value="Clear"/>	<input type="button" value="Submit and Finish"/>

When submitting an Original Filing you will select the Licensee Number from the drop down and complete all information requested. When the carrier is a list of Lloyds Syndicates, you will select carrier code 98, then select each syndicate that makes up the contract. Hit Submit and Finish. You will then select Print Data for this Session. Your risk number will be provided to you on the process complete report that will be emailed to you after the nightly process runs. Remember, if Missouri is not the Home State the filing will be rejected.

File Appendix 1 Supplemental



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[Home](#) [File Appendix 1](#) [File Appendix 3](#) [Upload Appendix File](#) [Print Data for this session](#) [Help](#)

License Number:	9999999 - test broker	
Tax Year:	2019	Help
Tax Quarter:	1: Jan 1-Mar 31	
Transaction Type:	Supplemental Filing	
Coverage Type:	Select one	
Insured City:		
Insured State:	Select one	
Insured Zip Code:		
Insured Home State Street Address:		
Insured Home State City:		
Insured Home State:	Select MO	
Insured Home State Zip:		
Reason for Placement:		
<input type="button" value="Submit and Continue"/>	<input type="button" value="Clear"/>	<input type="button" value="Submit and Finish"/>

When submitting a supplemental filing you will follow the same procedure as filing an original except you will have to enter the risk number you received from the original filing. If you filed the original using carrier code 98, you will only have to enter the carrier code 98 for Lloyds, not each syndicate again. Remember to Hit Submit and Finish. You will then select Print Data for this Session.

Appendix 3 Main Screen



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[Home](#) [File Appendix 1](#) [File Appendix 3](#) [Upload Appendix File](#) [Print Data for this session](#) [Help](#)

License Number:	Select one	
Tax Year:		
Transaction Type:	Select one	
<input type="button" value="Submit and Continue"/>	<input type="button" value="Clear"/>	<input type="button" value="Submit and Finish"/>

File Appendix 3 No Business

License Number: 9999999 - test broker
 Tax Year: 2019
 Transaction Type: No Business
 Submit and Continue Clear Submit and Finish

When filing No Business, you will select the Licensee Number from the drop down, the tax year, and No Business as the transaction type. Hit Submit and Finish. You will then select Print Data for this Session.

File Appendix 3 (Submit Filing)

License Number: 9999999 - test broker
 Tax Year: 2019
 Transaction Type: Submit Filing
 Risk Number: [blank]
 Coverage Type: Select one
 Carrier Code: Select one
 Name of Insured: [blank]
 Premium Amount Debit (include all fees): [blank]
 Premium Amount Credit (include all fees): [blank]
 Submit and Continue Clear Submit and Finish

Select the Licensee Number from the drop down, complete all information requested. Hit Submit and Finish. You will then select Print Data for this Session.

Upload Appendix File

Upload your Appendix 1 or Appendix 3 file. The file must be in the specified order and be a semi-colon delimited text file. Before uploading your data, be sure to verify the file meets both conditions. Files not in the correct format will not be uploaded into the database and not accepted as a submitted filing.

From the Home Page, select the Upload Appendix File button on the navigation bar.

WELCOME

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 USE MENU OPTIONS TO CONTINUE.
 Do NOT upload a file if you submit an online form from the 'FILE APPENDIX 1' or 'FILE APPENDIX 3' TAB.
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Select the Browse button from the appropriate upload type.

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Welcome Test Account Account_Settings Sign_out

Home File Appendix 1 File Appendix 3 Upload Appendix File Print Data for this session Help

Choose File No file chosen Upload Appendix 1 File

Choose File No file chosen Upload Appendix 3 File

Notice: Files uploaded will not be displayed on the printing page.

Navigate to the file location and select Save.

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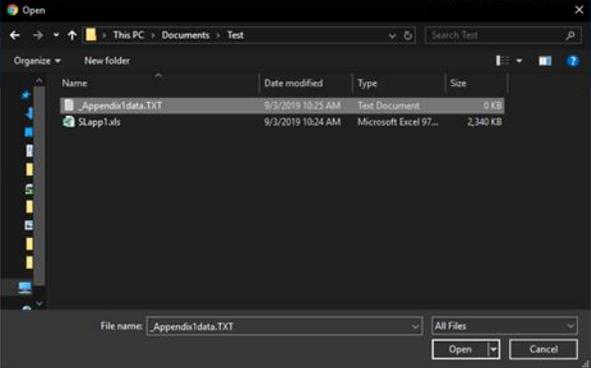
Welcome Test Account Account_Settings Sign_out

Home File Appendix 1 File Appendix 3 Upload Appendix File Print Data for this session Help

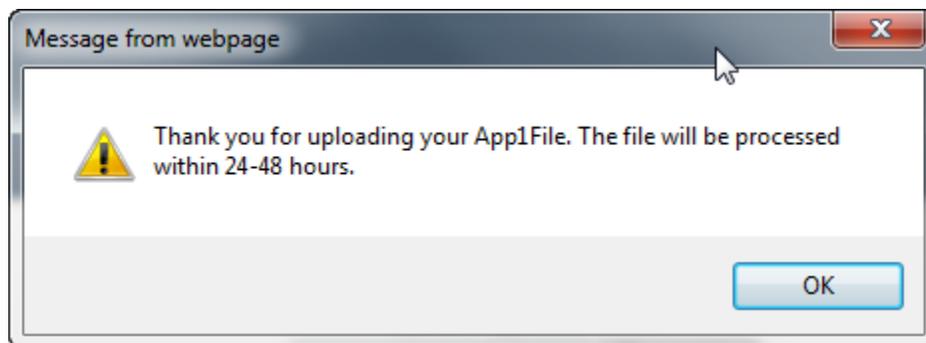
Choose File No file chosen

Choose File No file chosen

Notice: Files uploaded will not be displayed on the printing page.



You will receive a confirmation message that your file was submitted for processing.



Click Ok to return to the system.

Print Data for this Session

APPENDIX 1 - APPENDIX 3 FILINGS
(Print in landscape)
10/11/2013

APPENDIX 1 FILINGS
There have been no Appendix 1 Filings submitted for this session.

APPENDIX 3 FILINGS

License Num	Tax Year	Risk Number	Coverage Type	Carrier Code	Insured Name	Premium Debit	Premium Credit
219675	2013		0	0	No Business	\$0.00	\$0.00
156781	2013		0	0	No Business	\$0.00	\$0.00
326178	2013		0	0	No Business	\$0.00	\$0.00
326178	2013		0	0	No Business	\$0.00	\$0.00
196781	2012	123456	48	1	Test Insured 123 !@#	\$156,246,578.00	\$156,478.00

Help

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Welcome Test Account Account_Settings Sign_out

Home File Appendix 1 File Appendix 3 Upload Appendix File Print Data for this session **Help**

Choose File No file chosen Upload Appendix 1 File

Choose File No file chosen Upload Appendix 3 File

Notice: Files uploaded will not be displayed on the printing page.

Contact Us
User Manual
FAQ's

User Manual

This User Manual can be obtained from the **User Manual** menu as well as from the DCI web site at <http://insurance.mo.gov/industry/surplin/documents/SurplusLinesUserGuide.pdf>.

Contact Us

Contact the Department of Commerce and Insurance, for help with filings by email at SurplusLines@insurance.mo.gov.

SURPLUS LINES ONLINE FILINGS
DEPARTMENT OF COMMERCE AND INSURANCE

MICHAEL L. PARSON, GOVERNOR
CHLORA LINDLEY-MYERS, DIRECTOR

Contact Information

Department of Commerce and Insurance
Taxation Section
 301 W. High Street
 Jefferson City, MO 65101
 Email: SurplusLines@insurance.mo.gov
[Back to Login Page](#)

Frequently Asked Questions (FAQ)

Who must file a surplus line Appendix 1 form?

Any resident or non-resident Surplus Lines Producer holding an active Surplus Lines License is responsible for filing the Appendix 1 required by section **RSMo 384.057**. This form must be filed, even if no business was procured.

When is an Appendix 1 due?

Within 45 days after the end of each calendar quarter ending March 31, June 30, September 30 and December 31. You may submit your filings daily, weekly or monthly, as long as you submit at least one filing per quarter.

Is electronic filing available for Appendix 1 and Appendix 3 filings?

Yes, electronic filing is mandated and the instructions can be found on our website at insurance.mo.gov. Look for the Surplus Lines User Guide at insurance.mo.gov outlining the process.

Current tax year submissions should be filed using our Web Portal at [Surplus Lines Web Portal](https://surpluslines@insurance.mo.gov). Previous tax years are to be submitted on the excel spreadsheet and submitted to surpluslines@insurance.mo.gov.

How do I set up my Web login account?

You need to go to [Surplus Lines Web Portal](https://surpluslines@insurance.mo.gov) and press **Login/Register**; you will be redirected to MoLogin. On MoLogin you will need to press the Request Account hyperlink. When you log in to the newly create MoLogin account you will be redirected to the register page for Surplus Lines. You will then be instructed to fill all of the contact information. You will then select the Surplus Lines Producer(s) SL Number you will be submitting filings for and the producers' email address. Only one user can file for a Surplus Lines Producers SL #. If the producer leaves the agency or someone else becomes responsible for the filings, the current account holder will need to delete the producer(s) SL Number before another account holder can add it to their account. It is imperative that this information be kept current in the account settings.

How do I file a current year Appendix 1 or Appendix 3?

You will log into your account and select the appendix type at the top of the page you want to submit. You will need to fill out the form in its entirety and click either submit and continue or submit and finish. Please remember not to submit any tax amounts on your filings. If you choose, you may submit your Appendix 3 after receiving your confirmation report throughout the year.

What effective date do I use on my Appendix 1 for an Endorsement, cancellation, or audit?

Use the endorsement or cancellation date, not the original effective date of the policy. For audits, use the invoice date.

How do I get a copy of the filings I entered?

After you submit your filings, go to the Print Data for this session tab at the top of the page. This is the only time this information is available. You will be emailed the process complete report the next business day with the risk numbers for your records.

How long can the session set idle before it times out?

The session will time out after 20 minutes of non-usage. If your session times out due to inactivity, anything you have saved will be submitted but the print data for this session will be lost.

Are eligible surplus lines companies required to file rate or form?

No, these companies are not subject to rate or form and do not participate in the Guaranty Fund.

Are eligible surplus lines companies licensed?

No, eligible surplus lines companies that meet financial qualifications are approved and put on the White List.

What is the White List?

The White List is a listing of Missouri's eligible surplus lines companies.

Where is the White List located?

The White List can be found [here](#).

How often is the White List updated?

The White List is updated nightly, NAIC updates are received quarterly.

Who must file a Surplus Lines Licensee's Tax Report - Appendix 3?

Any resident or non-resident Surplus Lines Producer holding an active surplus lines license during any part of the tax year. This form must be filed even if no business was procured.

What is the Missouri surplus lines tax rate?

The tax rate is 5 percent of Missouri net premium including any applicable fees.

When is my Surplus Lines Licensee's Tax Report - Appendix 3 due?

Before March 2.

When will I receive my invoice for surplus lines tax payment due?

The Department does not send out invoices, you are required to submit the tax amount your accounting records state you owe. Tax Reconciliations are not guaranteed to be completed by the tax due date.

When is the surplus lines tax payment due?

Before April 16. This date will follow the Federal tax due date.

Where do I mail my tax payments?

The surplus lines remittance form and check should be mailed to:

Missouri Department of Revenue

P.O. Box 898

Jefferson City, MO 65105-0898 **Overnight**

address:

301 W High Street Room 102

Jefferson City, MO 65101

Does the Missouri Department of Revenue accept electronic fund transfers?

No, not at the present time.

Is post mark date acceptable on payments?

Yes, the post mark date is acceptable.

How many years back can I request a refund for overpayment?

No refund shall be made by the Director of Revenue unless a claim for refund has been filed within two years of date of payment per section [RSMo 136.035](#).

How do I file a claim?

Send a letter to the Director of the Department of Revenue at:

Missouri Department of Revenue

301 W. High St., Room 330

P.O. Box 898

Jefferson City, MO 65105-0898

The refund request should contain:

- Tax year
- Tax type
- Refund amount

Logout

Before closing the browser, be sure to logout. To logout, select the Sign Out hyperlink at the top right corner of the page. Upon successful logout, the system redirects you to a confirmation page.

