



Introductory Guide to Surplus Line Information (SLIP) Enhanced California's Electronic Filing System

Quick Info Tables:

Unsubmitted Transactions

Transactions with Alerts

Open Tags

Transactions Pending Review

Returned Transactions

Table of Contents

▶ Quick Info Table.....	<u>3</u>
▶ My Unsubmitted Transactions.....	<u>4</u>
▶ Total Unsubmitted Transactions.....	<u>5</u>
▶ Deleting an Unsubmitted Transaction.....	<u>6-7</u>
▶ My Unsubmitted Transactions with Alerts.....	<u>8</u>
▶ Total Unsubmitted Transactions with Alerts.....	<u>9</u>
▶ My Open Tags	<u>10</u>
▶ Responding to Multiple Tags.....	<u>11</u>
▶ Multiple Tag Response.....	<u>12</u>
▶ Responding to a Tag from a Tag No Hyperlink....	<u>13</u>
▶ Tag Response	<u>14</u>
▶ Responding to a Tag from Policy No Hyperlink....	<u>15</u>
▶ Total Open Tags.....	<u>16</u>
▶ Transactions Pending Review.....	<u>17</u>
▶ Returned Transactions.....	<u>18</u>

Quick Info Table

SLIP Surplus Lines Information Portal

SLA CALIFORNIA

HOME POLICIES SUBMISSIONS TAGS ACCOUNT REPORTS ANALYTICS USERS CONTACTS HELP SETTINGS LOGOUT

You are logged in as PATBKK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111), . [\[Change Location\]](#)

Welcome, PATRICIA MCAULEY!

We have been updating SLIP. Check out some of the recent changes.

- 8/12/2015 A new Analytics tab has been added to SLIP. +
- 5/25/2015 SL2 Form optimized for entering admitted insurers. +

Policy Actions

- Create New Policy** ⓘ
Create a new policy, upload documents, and complete online forms through the SLIP Create New Policy Wizard.
- Create Renewal** ⓘ
Report a Renewal for an existing policy or create a renewal from scratch through the SLIP Create Renewal Wizard.
- Create Endorsement** ⓘ
Report Endorsements, Cancellations, Audits, and Extensions for existing policies or create Endorsements from scratch through the SLIP Create Endorsement Wizard.
- Bulk Submission / Import Wizard** ⓘ
Upload policy data in bulk for direct submission to the SLA or for further review in SLIP through the SLIP Bulk Submission Wizard.

Quick Info

My Unsubmitted Transactions	0
Total Unsubmitted Transactions	0
My Unsubmitted Transactions with Alerts	0
Total Unsubmitted Transactions with Alerts	0
My Open Tags	0
Total Open Tags	0
Total Informational Tags	0
Transactions Pending Review	0
Returned Transactions	0
Invalid Bulk Submissions	0

- ▶ The Quick Info table provides an overview of transactions handled by the logged-in user compared with all users of the brokerage.

- ▶ The categories include:
 1. Unsubmitted transactions
 2. Transactions with alerts
 3. Open tags
 4. Pending and returned transactions

- ▶ Click on the number hyperlinks to display the list of transactions that qualify under each category.
 - Each category shows the transactions by the logged-in user and all users in the brokerage.

My Unsubmitted Transactions

The screenshot shows the SLIP/SLA California web application. The user is logged in as PATRIK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111). The 'Policy Search' tab is active, and the 'My Unsubmitted Transactions' sub-tab is selected. A table lists two transactions. A red arrow points to the first transaction, 'TEST-101', which has 0 alerts. The 'Alerts' column for this transaction is circled in red. The 'Submit Selected Transactions' button is visible at the bottom right of the table.

	Policy Number	Insured Name	Transaction Type	Effective Date	Endorsement Number	Premium	Last Updated On	Alerts	Docs
<input checked="" type="checkbox"/>	TEST-101	SECOND TEST CASE	New Business	06/26/2016		\$6,000.00	05/24/2016	0	1
<input type="checkbox"/>	TEST123	TESTING INSTITUTE	New Business	01/04/2016		\$2,725.00	05/24/2016		1

1 - 2 of 2 items

☐ Submit Selected Transactions

► My Unsubmitted Transactions lists the policies that the logged in user has saved.

► Transactions cannot be submitted to the SLA with alerts. Alerts must be corrected before submission.

► Select an item without any alerts by checking the check box next to the policy number. The Submit Selected Transactions button will be enabled for the user to click on.

Total Unsubmitted Transactions

You are logged in as PATBRK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111). [\[Change Location\]](#)

Policy Search [Create New Policy](#)

[Policy Search](#) [My Unsubmitted Transactions](#) [Returned Transactions](#)

Policy Search Criteria

Enter one or more search criteria below. The results will be limited to the first 500 matching records.

Policy Number:

Name of Insured:

SLA Submission Number:

Broker Reference Number:

Effective Date: to

Submission Date: to

☒ Only Policies with Unsubmitted Transactions
 ☐ Only Policies with Alerts
 ☐ Only Policies with Returned Transactions
 ☐ Only Policies with Open Tags
 ☐ Search Previous Policy Numbers

[Clear](#) [Search](#)

Policy Search Results

Click the Policy Number to view a policy.

Policy Number *	Insured Name	Policy Type	# Transactions	# Unsubmitted Transactions	# Returned Transactions	# Open Tags	# Alerts
TEST7323	TESTING INSTITUTE	5	1	1	0	0	3

10 items per page 1 - 1 of 1 items

- ▶ The Total Unsubmitted Transactions number hyperlink displays the number of saved transactions by all the users in the brokerage.
- ▶ Selecting the number hyperlink will transfer the user to the search screen. Under the Policy Search Results will be a list of the unsubmitted transactions by all users of the brokerage.
- ▶ Selecting the My Unsubmitted Transactions tab displays a list of those unsubmitted transactions saved by the logged in user.

Deleting an Unsubmitted Transaction

The screenshot shows the SLIP/SLA California Surplus Lines Information Portal. The user is logged in as PATBRIK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111). The interface includes a navigation bar with links like HOME, POLICIES, SUBMISSIONS, TAGS, ACCOUNT, REPORTS, ANALYTICS, USERS, CONTACTS, HELP, SETTINGS, and LOGOUT. The main section is titled 'Policy Search' and contains a 'Policy Search Criteria' form and a 'Policy Search Results' table.

Policy Search Criteria

Enter one or more search criteria below. The results will be limited to the first 500 matching records.

Policy Number:

☒ Only Policies with Unsubmitted Transactions
☐ Only Policies with Returned Transactions
☐ Search Previous Policy Numbers

Effective Date: to

Submission Date: to

Name of Insured:

SLA Submission Number:

Broker Reference Number:

Broker Reference Date: to

Policy Search Results

Click the Policy Number to view a policy.

Policy Number *	Insured Name	Policy Type	# Transactions	# Unsubmitted Transactions	# Returned Transactions	# Open Tags	# Alerts
TEST123	TESTING INSTITUTE	5	1	1	0	0	3

1 - 1 of 1 items

▶ To delete an unsubmitted transaction:

- Enter the search criteria
- Click on the Policy Number hyperlink of the item you wish to delete.

Deleting an Unsubmitted Transaction (continued)

The screenshot displays the SLIP/SLA California user interface. At the top, there's a navigation bar with links like HOME, POLICIES, SUBMISSIONS, TAGS, ACCOUNT, REPORTS, ANALYTICS, USERS, CONTACTS, HELP, SETTINGS, and LOGOUT. Below this, a 'Policy Details' section shows information for Policy / Binder Number: TEST123, Policy Type: Standard, Effective Date: 01/04/2016, and Expiration Date: 01/04/2017. The Primary Insured Name is TESTING INSTITUTE, and the Insured Address is CA 94111, UNITED STATES. An 'Edit' button is visible at the bottom right of this section.

Below the policy details is a 'Transactions' section with a table listing transactions. The first transaction is highlighted in yellow and has a delete icon (a trash can) in the 'Submission Number' column. Below the table, there are checkboxes for 'Exclude Backouts' and 'Exclude Returned', and buttons for 'Create Renewal' and 'Create Endorsement'.

The 'Transaction Details' section is expanded, showing a red alert banner at the top: '2 alerts have been identified for this transaction. All alerts must be resolved before submission to the SLS. [Click here to review.](#)'. Below the alert, there are tabs for Details, Layering, Certificates, Multi-State, SLI, GAP, SLI, Documents, and Notes. The 'Details' tab is active, showing fields for Transaction Type (New Business), Effective Date (01/04/2016), Expiration Date (01/04/2017), Invoice Date (01/16/2016), Multiple Insurer (NO), and Multi-State (NO). Below these are sections for INSURER, COVERAGES, and FEES. The FEES section includes a table with columns for Fee Name, Include in Premium (Subject to Tax), and Fee Amount. The table lists POLICY FEE, INSPECTION FEE, BROKER FEE, and OTHER FEES. At the bottom of the FEES section, there are summary totals: Total Fees: \$125.00, Taxable Premium (including Fees): \$2,725.00, Estimated CA St. State Tax (STG): \$81.75, and Estimated Stamping Fee: \$5.45. At the very bottom of the 'Transaction Details' section, there is a 'Delete' button circled in red, along with 'Submit', 'Resume in Wizard', and 'Edit' buttons.

- At the bottom of the Policy Details screen, click the Delete icon (you may need to click the edit icon to the left of the transaction you wish to delete to expand the Transaction Details section first).
- The policy will be removed from your saved list.

My Unsubmitted Transactions with Alerts

The screenshot shows the SLIP/SLA California Surplus Lines Information Portal. The user is logged in as PATSRK. The 'My Unsubmitted Transactions' section is active, showing a table of transactions. The 'Alerts' column for the first transaction (Policy Number: T557123) is highlighted with a red circle, indicating a red alert icon.

	Policy Number	Insured Name	Transaction Type	Effective Date	Endorsement Number	Premium	Last Updated On	Alerts	Docs
<input type="checkbox"/>	T557123	TESTING INSTITUTE	New Business	01/04/2016		\$2,725.00	05/24/2016		

The 'Alert Summary' pop-up window displays three alerts for the transaction. The text states: '3 alerts have been identified for this transaction. This transaction cannot be submitted to the SLA for review until all alerts are resolved.'

Section	Field Name	Alert Description
Transaction Details	Effective Date	Effective Date is before Broker License Effective Date.
SL2 Form	SL2 Form	SL2 Form is missing
SL1 Form	SL1 Form	SL1 Form is missing

OK

- ▶ My Unsubmitted Transactions with Alerts hyperlink brings you to a list of your saved transactions with Alerts.
- ▶ To submit a transaction to the SLA, the user will first need to correct all the alerts. Click on the number hyperlink under Alerts to view the Alert summary.
- ▶ Once the alerts are cleared, select the item by checking the check box. The Submit Transactions button will be enabled for the user to click on.

Total Unsubmitted Transactions with Alerts

- ▶ Total Unsubmitted Transactions with Alerts shows the number of policies with alerts saved by all the users in the brokerage.
- ▶ Selecting the number hyperlink will bring the user to the search screen. Under the Policy Search Results section will be a list of all the unsubmitted transactions with alerts for the brokerage.
- ▶ Selecting the My Unsubmitted Transactions tab will display a list of only those unsubmitted transactions with alerts for the logged in user.

Policy Search

Q Policy Search My Unsubmitted Transactions Returned Transactions

Policy Search Criteria

Enter one or more search criteria below. The results will be limited to the first 500 matching records.

Policy Number:

☒ Only Policies with Unsubmitted Transactions ☒ Only Policies with Alerts

☐ Only Policies with Returned Transactions ☐ Only Policies with Open Tags

☐ Search Previous Policy Numbers

Effective Date: to

Submission Date: to

SLA Submission Number:

Broker Reference Number:

Broker Reference Date: to

Clear Search

Policy Search Results

Click the Policy Number to view a policy.

Policy Number *	Insured Name	Policy Type	# Transactions	# Unsubmitted Transactions	# Returned Transactions	# Open Tags	# Alerts
TEST123	TESTING INSTITUTE	S	1	1	0	0	3

10 items per page 1 - 1 of 1 items

My Open Tags

You are logged in as PATSBRIK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111), . [\[Change Location\]](#)

My Open Tags

Tag Search | My Open Tags | Informational Tags

To respond to tags, select one or more tags below and click the Respond to Selected Tags button. You may respond to one or more non-Informational Tags at the same time, regardless of Policy Type or Transaction Type.

Tag Number	Tag Type	Policy Number	Insured Name	Transaction Type	Effective Date	Tag Status	Due Date	Submission Number	Submission Date
374012822	DEC21 - RENEWAL HAS NO RECORD OF PRIOR POLICY	TESTABC	TEST CASE NO. 1	Renewal	06/23/2016	Open (Unanswered)	06/23/2016	2016-05-24/0001	05/24/2016
374012823	SL10 - MISSING SL1 FORM	TESTABC	TEST CASE NO. 1	Renewal	06/23/2016	Open (Unanswered)	08/22/2016	2016-05-24/0001	05/24/2016
374012824	SL11 - MISSING SL2 FORM	TESTABC	TEST CASE NO. 1	Renewal	06/23/2016	Open (Unanswered)	08/22/2016	2016-05-24/0001	05/24/2016

10 items per page 1 - 3 of 3 items

[Print Selected Tags](#) [Respond to Selected Tags](#)

- ▶ My Open Tags tab displays a list of tags for the logged in user.
- ▶ There are three options to answer tags:
 - Clicking the checkbox next to the Tag Number hyperlink allows you to select multiple tags.
 - Clicking the Tag Number takes you to the specific tag.
 - Selecting the Policy Number hyperlink allows you to view the policy details before responding to a tag.

Responding to Multiple Tags

You are logged in as PATBRK, on behalf of (8466) SURPLUS INSURANCE BROKER (0A111111), . [\[Change Location\]](#)

My Open Tags

Tag Search My Open Tags Informational Tags

My Open Tags

To respond to tags, select one or more tags below and click the Respond to Selected Tags button. You may respond to one or more non-Informational Tags at the same time, regardless of Policy Type or Transaction Type.

<input checked="" type="checkbox"/>	Tag Number	Tag Type	Policy Number	Insured Name	Transaction Type	Effective Date	Tag Status	Due Date	Submission Number	Submission Date
<input checked="" type="checkbox"/>	374012822	DEC21 - RENEWAL HAS NO RECORD OF PRIOR POLICY	TESTABC	TEST CASE NO. 1	Renewal	06/23/2016	Open (Unanswered)	06/23/2016	2016-05-24/0001	05/24/2016
<input checked="" type="checkbox"/>	374012823	SL10 - MISSING SL1 FORM	TESTABC	TEST CASE NO. 1	Renewal	06/23/2016	Open (Unanswered)	08/22/2016	2016-05-24/0001	05/24/2016
<input checked="" type="checkbox"/>	374012824	SL11 - MISSING SL2 FORM	TESTABC	TEST CASE NO. 1	Renewal	06/23/2016	Open (Unanswered)	08/22/2016	2016-05-24/0001	05/24/2016

1 - 3 of 3 items

Print Selected Tags Respond to Selected Tags

- ▶ In the first option, the user can select one or more tags to respond to by checking the checkbox next to the tag number.
- ▶ Then, the user clicks on the Respond to Selected Tags button which is directed to the Tag Response page.

Multiple Tag Response

SLIP Surplus Lines Information Portal | **SLA** CALIFORNIA

HOME | POLICIES | SUBMISSIONS | TAGS | ACCOUNT | REPORTS | ANALYTICS | USERS | CONTACTS | HELP | SETTINGS | LOGOUT

You are logged in as PATBRIK, on behalf of [B466] SURPLUS INSURANCE BROKER (0A111111), . [\[Change Location\]](#)

Tag Response

Tag Summary

You are responding to the following tags. You can expand any row using the arrow icon on the left to see details of the tag.

Tag Number	Tag Type	Policy Number	Transaction Type	Due Date	
▶ 374012822	DEC21 - RENEWAL HAS NO RECORD OF PRIOR POLICY	TESTABC	Renewal	06/23/2016	✖
▶ 374012823	SL10 - MISSING SL1 FORM	TESTABC	Renewal	08/22/2016	✖
▶ 374012824	SL11 - MISSING SL2 FORM	TESTABC	Renewal	08/22/2016	✖

Tag Response

Note: Entering and submitting a response below will respond to all unanswered tags listed in the Tag Summary panel.

* Response:

Upload Documents (optional): Each file must be less than 10 Mb in size and one of the following formats: TIFF, PDF, PNG, PDF/A, or JPG/JPEG.

File Name	Size	Tag Number
No files selected.		

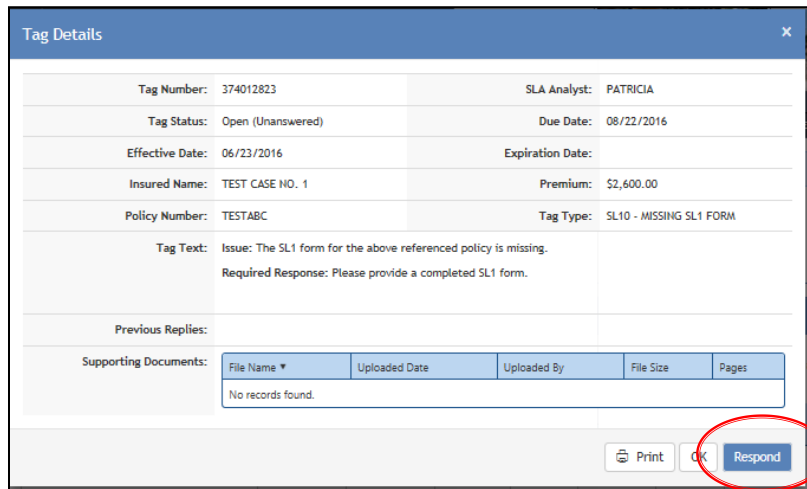
Select files...

Back

[Submit Response](#)

- ▶ The user responds to the tag in the Response box.
- ▶ If a document is required, the user can select the file from his/her files and click on the Submit Response button to send to the SLA.

Responding to a Tag from a Tag Number Hyperlink



The screenshot shows a 'Tag Details' window with the following information:

Tag Number:	374012823	SLA Analyst:	PATRICIA										
Tag Status:	Open (Unanswered)	Due Date:	08/22/2016										
Effective Date:	06/23/2016	Expiration Date:											
Insured Name:	TEST CASE NO. 1	Premium:	\$2,600.00										
Policy Number:	TESTABC	Tag Type:	SL10 - MISSING SL1 FORM										
Tag Text:	Issue: The SL1 form for the above referenced policy is missing. Required Response: Please provide a completed SL1 form.												
Previous Replies:													
Supporting Documents:	<table border="1"><thead><tr><th>File Name</th><th>Uploaded Date</th><th>Uploaded By</th><th>File Size</th><th>Pages</th></tr></thead><tbody><tr><td colspan="5">No records found.</td></tr></tbody></table>			File Name	Uploaded Date	Uploaded By	File Size	Pages	No records found.				
File Name	Uploaded Date	Uploaded By	File Size	Pages									
No records found.													

At the bottom right, there are three buttons: 'Print', 'OK', and 'Respond'. The 'Respond' button is circled in red.

- ▶ In the second option, the user clicks on the Tag Number hyperlink and the Tag Details screen opens.
- ▶ Click on the **Respond** button to navigate to the tag response page.

Tag Response

SLIP Surplus Lines Information Portal

SLA CALIFORNIA

HOME POLICIES SUBMISSIONS TAGS ACCOUNT REPORTS ANALYTICS USERS CONTACTS HELP SETTINGS LOGOUT

You are logged in as PATBRK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111), . [\[Change Location\]](#)

Tag Response

Tag Summary

You are responding to the following tags. You can expand any row using the arrow icon on the left to see details of the tag.

Tag Number ▲	Tag Type	Policy Number	Transaction Type	Due Date
▶ 374012823	SL10 - MISSING SL1 FORM	TESTABC	Renewal	08/22/2016

Tag Response

Note: Entering and submitting a response below will respond to all unanswered tags listed in the Tag Summary panel.

* Response:

Upload Documents (optional): Each file must be less than 10 Mb in size and one of the following formats: TIFF, PDF, PNG, PDF/A, or JPG/JPEG.

File Name	Size	Tag Number
No files selected.		

Select files...

Back

☒ Submit Response

- ▶ Enter the answer to the tag in the Response field.
- ▶ Upload additional documents (if required) by selecting the file.
- ▶ Click the Submit Response button to send your response to the SLA.

Responding to a Tag from the Policy Number Hyperlink

The screenshot displays the SLIP/SLA California web application interface. The top navigation bar includes links for HOME, POLICIES, SUBMISSIONS, TAGS, ACCOUNT, REPORTS, ANALYTICS, USERS, CONTACTS, HELP, SETTINGS, and LOGOUT. The user is logged in as PATRIK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111).

Policy Details

Policy / Binder Number: TESTABC	Effective Date: 06/23/2016
Policy Type: Standard	Expiration Date: 06/23/2017
Primary Insured Name: TEST CASE NO. 1	SIC Type: SERVICES
Insured Address: CA 94578 UNITED STATES	SIC Code: [8700] ENGINEERING & MANAGEMENT SERVICES
	Exempt Commercial Purchaser: NO

Transactions

Submission Number	Submission Type	Transaction Type	Status	Effective Date	Premium	Taxable Fees	Stamping Fee	Docs	Alerts	Open Tags
2016-05-24/0001	SLIP	Renewal	Registered	06/23/2016	\$2,600.00	\$0.00	\$5.20	1		3

Transaction Details

Submission Number: [2016-05-24/0001](#) Submission Date: 05/24/2016 Submitted By: [PATRICIA MCAULEY](#) Status: Registered
Transaction Type: Renewal Endorsement Number: Registered By: [PAT MCAULEY](#) Registration Date: 05/24/2016

Tag Summary

To respond to tags, select one or more tags below and click the Respond to Selected Tags button. You may respond to one or more non-Informational Tags at the same time, regardless of Policy Type or Transaction Type.

Tag Number	Tag Type	Tag Status	Due Date
<input type="checkbox"/> 374012822	DEC21 - RENEWAL HAS NO RECORD OF PRIOR POLICY	Open (Unanswered)	06/23/2016
<input type="checkbox"/> 374012823	SL10 - MISSING SL1 FORM	Open (Unanswered)	08/22/2016
<input type="checkbox"/> 374012824	SL11 - MISSING SL2 FORM	Open (Unanswered)	08/22/2016

☒ Only Show Open Tags

- ▶ In the third option, click on the Policy Number hyperlink from your tag search to view details of the policy.
- ▶ The transaction details appear at the bottom of the screen so the user can review what was previously submitted for that policy number prior to responding to the tag.
- ▶ On the Tag Summary section of the page (the user may need to click the edit icon to the left of the transaction they wish to view in order to see the Tag Summary section), the same tag options are available as when the user selected the number hyperlink next to the My Open Tags on the home page.

Total Open Tags

You are logged in as MTRAIN, on behalf of [6474] TRAINING BROKERAGES (123456), -

Tag Search

Tag Search | My Open Tags | Informational Tags

Tag Search Criteria

Enter one or more search criteria below. Note: If you are looking for historical data, please expand the date range of the request.

Tag Number: Policy Number:

Note: If Tag Number is provided, all other search criteria will be ignored.

Tag Status: **Open** Insured Name:

Tag Type: SLA Submission Number:

Submission Date: 07/10/2015 to

Clear Search

Tag Search Results

To respond to tags, select one or more tags below and click the Respond to Selected Tags button. You may respond to one or more non-informational tags at the same time, regardless of Policy Type or Transaction Type.

<input type="checkbox"/>	Tag Number	Tag Type	Policy Number	Insured Name	Transaction Type	Effective Date	Tag Status	Due Date	Submission Number	Submission Date
<input type="checkbox"/>	374013849	SECS - UNKNOWN SECURITY	1234560	ABC PROPERTY MANAGEMENT, INC.	New Business	11/01/2016	Open (Unanswered)	08/07/2017	2016-11-21-0000	11/21/2016
<input type="checkbox"/>	374013847	SL10 - MISSING SL1 FORM	1234560	ABC PROPERTY MANAGEMENT, INC.	New Business	11/01/2016	Open (Unanswered)	08/09/2017	2016-11-21-0000	11/21/2016
<input type="checkbox"/>	374013848	SL11 - MISSING SL2 FORM	1234560	ABC PROPERTY MANAGEMENT, INC.	New Business	11/01/2016	Open (Unanswered)	08/09/2017	2016-11-21-0000	11/21/2016

- ▶ Total Open Tags is a list of all open tags for the brokerage.
- ▶ Total Informational Tags is a list of all informational tags that have not been viewed.
- ▶ The top section shows the search criteria for open tags. You can also select other search options from the drop down menu.
- ▶ The bottom section shows the search results from the search criteria. After selecting the tag(s) to respond to, follow the same steps as answering My Open Tags.

Transactions Pending Review

The screenshot displays the SLIP/SLA California Surplus Lines Information Portal. The user is logged in as PATBRK, on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111). The page shows a 'Submission List' with search filters and a table of submissions. The 'Submitted' status in the table is circled in red.

Submission List

Submission Date Range: 05/25/2014 to []
Broker Reference Date: []
☐ Only Show My Submissions
☒ Only Show Pending Review
Source: []
Broker Reference Number: []
Filter
Clear

SLA Submission Date	SLA Submission Number	Source	Submission Status	Broker Reference Date	Broker Reference Number	Total Premium	Transaction Count
05/24/2016	2016-05-24/0028	SLIP	Submitted			\$31,000.00	1

10 items per page 1 - 1 of 1 items

- ▶ Clicking on the Transactions Pending Review number hyperlink displays the number of transactions that have been submitted to the SLA and are waiting review.

Returned Transactions

The screenshot displays the SLIP/SLA California Surplus Lines Information Portal. The top navigation bar includes links for HOME, POLICIES, SUBMISSIONS, TAGS, ACCOUNT, REPORTS, ANALYTICS, USERS, CONTACTS, HELP, SETTINGS, and LOGOUT. A user login message indicates the user is logged in as PATBRK on behalf of [8466] SURPLUS INSURANCE BROKER (0A111111). The main content area features a 'Policy Search' section with tabs for 'Policy Search', 'My Unsubmitted Transactions', and 'Returned Transactions'. The 'Returned Transactions' tab is active, showing a table titled 'My Returned Transactions'. The table has columns for Policy Number, Insured Name, Transaction Type, Effective Date, Endorsement Number, Premium, Last Updated On, Alerts, Docs, and Return Reason. Below the table, a message states 'No records found.' and a pagination bar shows '0' items per page. A 'Resubmit Selected Transactions' button is located at the bottom right of the table area.

Policy Number	Insured Name	Transaction Type	Effective Date	Endorsement Number	Premium	Last Updated On ▼	Alerts	Docs	Return Reason
No records found.									

0 items per page

Resubmit Selected Transactions

- ▶ Clicking on the number hyperlink next to Returned Transactions will display a list of transactions returned by the SLA for user review and resubmission (if required).