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Registration

Request a Washington Filing Portal Admin Account for your Brokerage.

1. One person from your brokerage should be chosen as the administrator and should contact the Surplus Line Association of Washington (info@surpluslines.org) to request Washington Filing Portal Administrator credentials.
2. The administrator will receive a registration e-mail with account login credentials.

Visit the Washington Filing Portal website at <https://wfp.surpluslines.org> and log in.

DASHBOARD VIEW

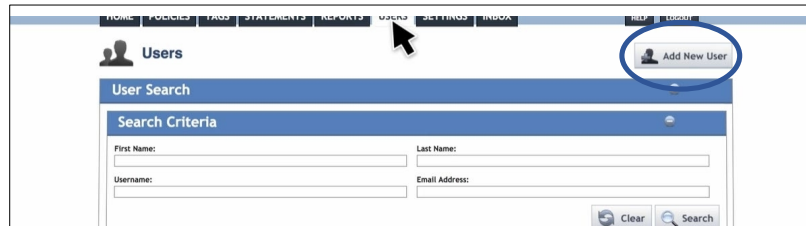
The screenshot shows the Washington Filing Portal dashboard. At the top, the Surplus Line Association of Washington logo is on the left, and "Washington Filing Portal" is on the right. Below the logo is a red banner with the text: "ATTENTION: Effective January 1st, 2026 - Physical Checks No Longer Accepted. Please establish an ePayment method for your brokerage as soon as possible to prepare for this transition." Below the banner is a navigation bar with links: HOME, POLICIES, TAGS, STATEMENTS, EPAYMENTS, REPORTS, USERS, SETTINGS, INBOX, HELP, and LOGOUT. Below the navigation bar is a status bar indicating the user is logged in as SLAW5, on behalf of brokerage.

The main content area is divided into two columns. The left column contains a "Welcome, WA SLA!" message, followed by a "Welcome to the Washington Filing Portal (WFP)" message, and then a "Please remember to recertify transactions when changes have been made to the policy information or transaction details." message. Below this is a "Tips and New Information" section with a "SLA of Washington is upgrading our filing portal and would love your feedback, WFP User Feedback Form" link. A "REMINDER" section states that policies with an effective date on or after January 1, 2025 are subject to a new stamping fee rate of .30% (.003). A "Determine the applicable stamping fee based on your transaction type" link is provided. A "NEED TO ADD A NEW BROKER?" section lists three steps: 1. Process a Surplus Line Broker Affiliation to the Brokerage with the OIC, 2. Email a completed Membership Agreement, signed by the Surplus Line Broker to: courtney@surpluslines.org, and 3. We will add the new Surplus Line Broker to your SLIP profile for filings in the State of WA. A "NEW ELIGIBLE INSURERS" section lists several insurance companies and their NAIC numbers.

The right column contains a "NOVEMBER NEWSLETTER" section with a "SEPTEMBER STAMPING FEE STATEMENT IS READY!" message. Below this is a "QUESTIONS?" section with contact information for Taxes (taxinfo@surpluslines.org), Accounting (accounting@surpluslines.org), and Courtney Gosney (courtney@surpluslines.org). A "WISP | Carol Durant" contact is also listed with the email carol@surpluslines.org. A "WFP Reference Guide" link is provided. At the bottom of the right column is a "SLA Contact Information" section with an "Inbox" link.

Creating a Washington Filing Portal User Account

1. From Dashboard, click 'USERS'
2. Click Add New User



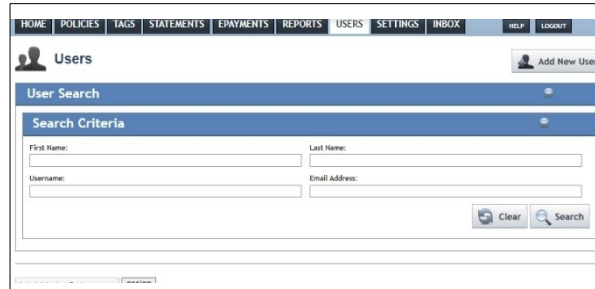
3. Fill Out User Details as Directed
 - Include Desired Username
 - Washington Filing Portal Will Generate a Password Automatically
4. Choose Notification Preferences
5. Choose Appropriate Level of Security
 - Administrator: *Add, Edit and View Policy Data*
Add, Edit and Delete Users
 - Edit and View: *Add, Edit and View Policy Data*
 - View Only: *View Previously Submitted Data (no input or editing)*

A screenshot of the 'Add New User' form. The form is divided into several sections: 'Email Address' (with a text field containing 'mhorton@email.com'), 'Mailing Address' (with fields for Address 1, Address 2, City, State, and Zip Code), 'Physical Address (Make same as mailing)' (with similar fields), 'Phone Number' and 'Fax Number' (with text fields), and 'Security Info' (with radio buttons for 'Administrator', 'Edit & View', and 'View'). The 'Administrator' role is selected and circled in blue. There are also checkboxes for 'Receive Email Notification on Registration', 'Receive Email Notification on Tagged Transactions', 'Receives Monthly Statements', and 'Ignore Help Messages'. At the bottom, there are buttons for 'Edit', 'Save', 'Cancel', and 'Delete'. The 'Save' button is highlighted with a mouse cursor.

6. Click Save
7. Washington Filing Portal will send the new user login credentials for Washington Filing Portal Access.

Adding E-Payment Access to Existing Users

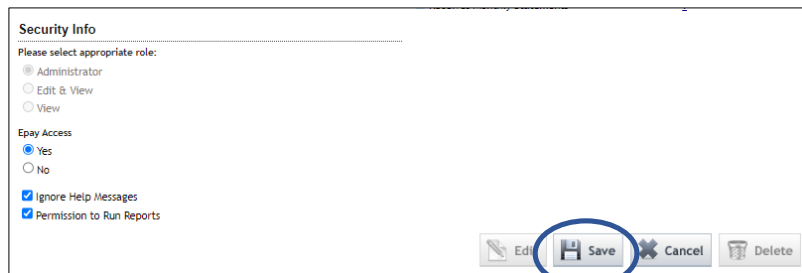
1. From Dashboard, click 'USERS'
2. Use the search field to find the user you'd like to change permissions for. *Note: Not all search fields need to be filled out to search existing Users. Start by searching only the user's email address.



3. If Washington Filing Portal finds a matching user credential, the User Details will appear below the Search Criteria section. There, you can review user details, such as name, address, phone number, etc. for accuracy. The bottom of the User Details page shows Security Info and Notification Settings.
4. Click Edit.



5. You can now modify user details, including Security Info and Notification settings. Click the Epay Access bubble and hit save.



6. The User has now been given EPay access and can process payments on behalf of the brokerage.

User Management

Navigating Washington Filing Portal Dashboard

1. The Washington Filing Portal Dashboard has many quick links such as:
 - Policies
 - Tags
 - Statements
 - Reports
 - Users
 - Settings
 - Inbox
 - Policy Search
 - New Policy
 - Renewal Policy
 - Questioned Transactions

DASHBOARD VIEW

The screenshot displays the Washington Filing Portal dashboard for the Surplus Line Association of Washington. The header features the organization's logo and the title 'Washington Filing Portal'. A prominent orange banner provides an attention notice regarding the transition to ePayment by January 1st, 2025. Below the banner is a navigation menu with links to Home, Policies, Tags, Statements, EPayments, Reports, Users, Settings, and Inbox, along with Help and Logout buttons. A status bar indicates the user is logged in as SLAW3 on behalf of a brokerage. The main content area is divided into three sections: a welcome message for WA SLA members, a 'Tips and New Information' section with updates on filing portal upgrades and a feedback form, and a 'November Newsletter' section with contact information for various departments. A sidebar on the right contains 'SLA Contact Information' and an 'Inbox' button.

Surplus Line
ASSOCIATION OF WASHINGTON

Washington Filing Portal

ATTENTION: Effective January 1st, 2025 - Physical Checks No Longer Accepted
Please establish an [ePayment method](#) for your brokerage as soon as possible to prepare for this transition.

HOME POLICIES TAGS STATEMENTS EPAYMENTS REPORTS USERS SETTINGS INBOX HELP LOGOUT

You are logged in as SLAW3, on behalf of brokerage

Welcome, WA SLA!

Welcome to the Washington Filing Portal (WFP). This secure website was designed exclusively for all licensed and appointed Surplus Line Association of WA Brokerages and their employees to search, submit, and edit policy data. WFP also serves as a means to run reports for a variety of needs and to receive the latest industry news from the Surplus Line Association of Washington. To begin, please select from the menu bar above or from one of the links on this page.

Please remember to recertify transactions when changes have been made to the policy information or transaction details.

If you need help navigating WFP, be sure to watch our WFP training videos at [surpluslines.org](#)

Tips and New Information

SLA of Washington is upgrading our filing portal and would love your feedback.
[WFP User Feedback Form](#)

REMINDER: Policies with an effective date on or after January 1, 2025 are subject to the new stamping fee rate of .30% (.003)

Determine the applicable stamping fee based on your [transaction type](#).

NEED TO ADD A NEW BROKER?

1. Process a Surplus Line Broker Affiliation to the Brokerage with the [OIC](#).
2. Email a completed [Membership Agreement](#), signed by the Surplus Line Broker to: courtney@surpluslines.org.
3. We will add the new Surplus Line Broker to your SLIP profile for filings in the State of WA.

NEW ELIGIBLE INSURERS:

- >Blue Hill Specialty Insurance Company, NAIC# 15643
- >HCC Reinsurance Company, Ltd., AID# AA3190172
- >Securian Specialty Lines, Inc., NAIC# 17631
- >Berkshire Hathaway European Insurance DAC, AID# AA1780132
- >Cypress Property & Casualty Insurance Company, NAIC# 10953
- >Berkley Luxury Insurance Company, NAIC# 17673

NOVEMBER NEWSLETTER

SEPTEMBER STAMPING FEE STATEMENT IS READY!

Our ePayment process has been updated. See our [ePayment SLIP User Guide](#) for common questions and more information.

QUESTIONS?

Taxes
taxinfo@surpluslines.org

Accounting
accounting@surpluslines.org

Courtney Gosney
courtney@surpluslines.org
(206) 682-3409

WISP | Carol Durant
carol@surpluslines.org
(206) 224-4234

[WFP Reference Guide](#)

SLA Contact Information

Inbox

Changing your Password

1. From Dashboard, click 'USERS'
2. Washington Filing Portal Admin: Search for Username
3. Washington Filing Portal User: User Details Auto-Populate
4. Click Edit Button
5. Enter New Password Under Change Password

The screenshot shows a web form for editing user details. The 'Login Info' section has a 'Change Password' field circled in blue. Below the form, there are buttons for 'Edit', 'Save', 'Cancel', and 'Delete'. The 'Edit' button is also circled in blue. The form includes sections for Personal Info, Login Info, Mailing Address, Physical Address, and Security Info.

Personal Info		Login Info	
First Name	Last Name	Username	Change Password
BROKERAGE	ADMINISTRATOR	ADMIN	
Email Address: SLAS_SUPPORT@INFINITY-SOFTWARE.COM		User Type: BROKERAGE	Reset Password
Mailing Address		Physical Address (Make same as mailing)	
Mailing Address 1	Physical Address 1		
P.O. BOX 10150	P.O. BOX 10150		
Mailing Address 2	Physical Address 2		
Mailing City	Physical City		
SPOKANE	SPOKANE		
Mailing State	Physical State		
WA	WA		
Mailing Zip Code	Physical Zip Code		
99219	99219		
Phone Number:	Fax Number:		
509-838-0655	509-838-1710		
408-400-0000	408-400-0000		
Security Info			
Please select appropriate role:			
<input checked="" type="radio"/> Administrator			
<input type="radio"/> Edit & View			
<input type="radio"/> View			

Buttons: Edit, Save, Cancel, Delete

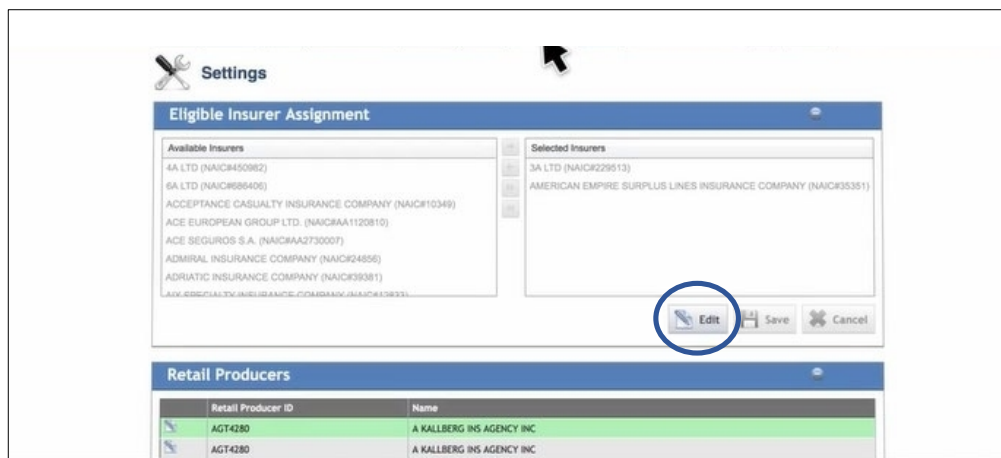
- Email Address and Notification Settings May be Changed as Desired on this Screen.

6. Click Save

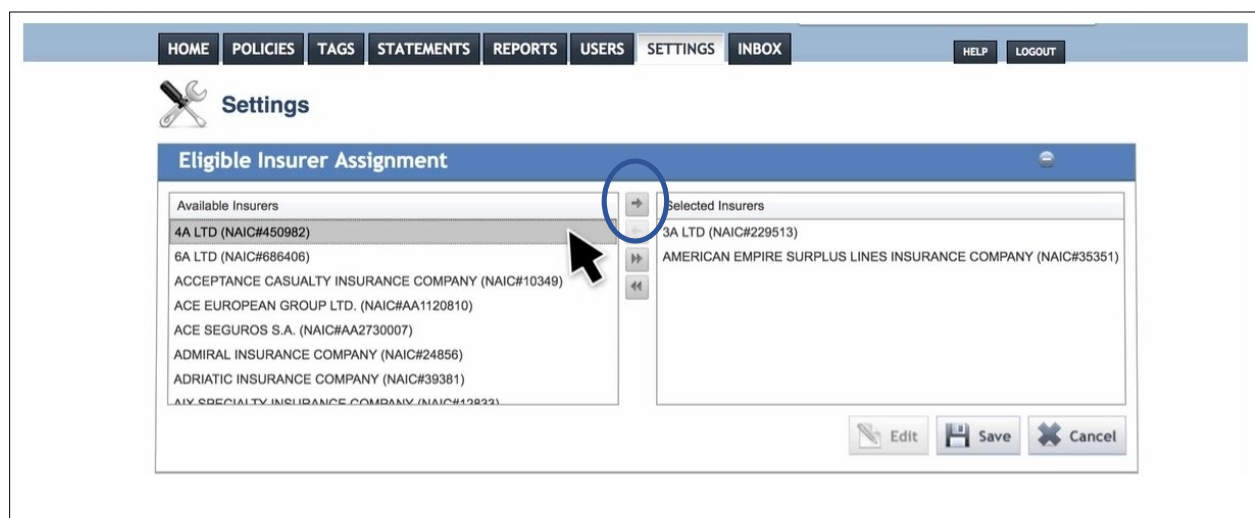
Add Eligible Insurers to Easy Access List

1. From Dashboard, click 'SETTINGS'
 - Create a Sub-list for Easy Access to your Commonly Used Insurers
2. Click Edit Button

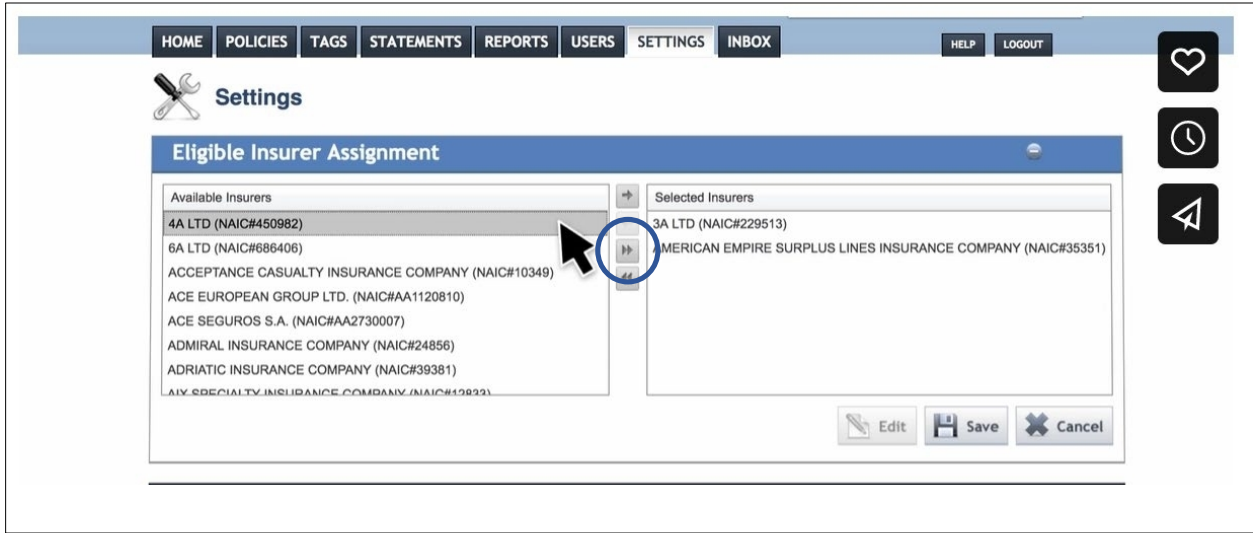
SETTINGS VIEW



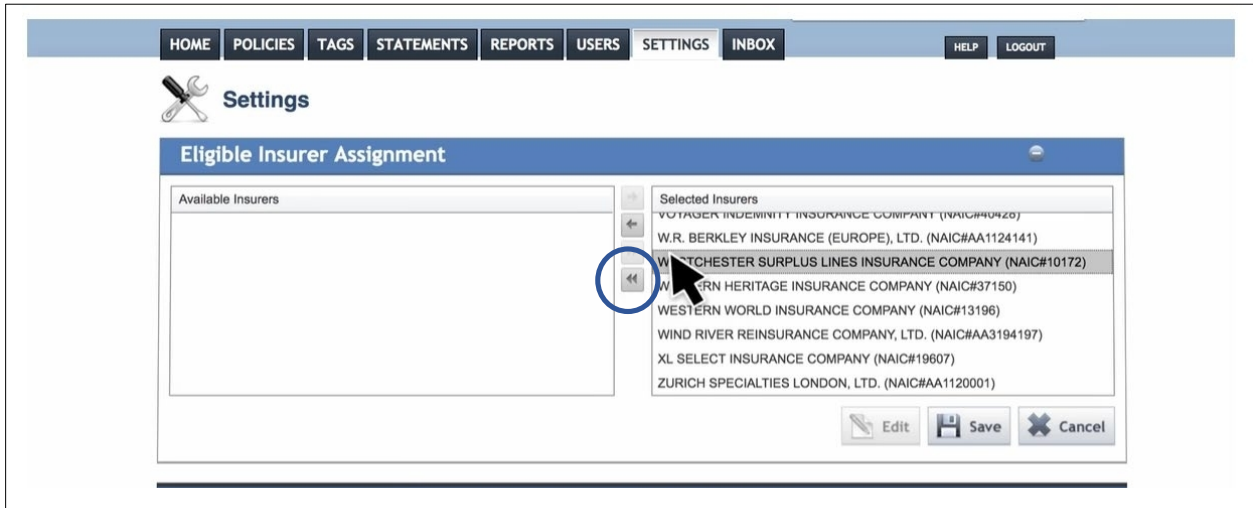
3. Choose from the Pre-Populated List on the Left
4. Click to Highlight Desired Insurer
5. Click Arrow Button at Top Center to Add to Quick Access on Right



6. Move All Names at Once by Selecting the Double Arrow Button



7. Remove an Insurer by Clicking Double Back Button



8. Click Save

Adding Retail Producers

1. From Dashboard, click 'SETTINGS'
2. Scroll Down to Retail Producers
3. Click New

SETTINGS VIEW RETAIL PRODUCERS SECTION

The screenshot shows the 'Retail Producers' section in the Settings View. At the top, there is a table with columns 'Retail Producer ID' and 'Name'. The table contains the following data:

Retail Producer ID	Name
AGT4280	A KALLBERG INS AGENCY INC
AGT4280	A KALLBERG INS AGENCY INC
ASI50882	A MILWAUKEE AGENCY INC
AGT0015	A PLUS INSURANCE & FINANCIAL SERVICES, INC
AGT0381	A+ INSURANCE SERVICES

Below the table, there is a filter bar: 'Filter grid by names beginning with' followed by a text input field and a '[Filter]' button. Below the filter bar, there is a 'Retail Producer Info' form with the following fields:

- ID: AGT4280
- Retail Producer Name: A KALLBERG INS AGENCY INC
- Address Line 1: P.O. BOX 3548 XVCVVKC
- Address Line 2:
- City: SPOKANE
- State: WA
- Zip: 992203548

At the bottom right of the form, there are five buttons: 'New', 'Edit', 'Save', 'Cancel', and 'Delete'. The 'New' button is circled in blue.

4. Enter Information of Retail Producer

The screenshot shows the 'Retail Producers' section in the Settings View. At the top, there is a table with columns 'Retail Producer ID' and 'Name'. The table contains the following data:

Retail Producer ID	Name
AGT4280	A KALLBERG INS AGENCY INC
ASI50882	A MILWAUKEE AGENCY INC
AGT0015	A PLUS INSURANCE & FINANCIAL SERVICES, INC
AGT0381	A+ INSURANCE SERVICES

Below the table, there is a filter bar: 'Filter grid by names beginning with' followed by a text input field and a '[Filter]' button. Below the filter bar, there is a 'Retail Producer Info' form with the following fields:

- ID: GHIJ1234
- Retail Producer Name: Commonwealth Associates
- Address Line 1: 123 Main Street
- Address Line 2:
- City: Seattle
- State: WA
- Zip: 98101

At the bottom right of the form, there are five buttons: 'New', 'Edit', 'Save', 'Cancel', and 'Delete'. The 'New' button is circled in blue.

5. Click Save

Edit Existing Retail Producers

1. Select the Retail Producer Name to Edit
2. Click Edit
3. You Can Also Delete if Desired

NOTE: Any changes made on this page will affect all Washington Filing Portal users for your brokerage.

The screenshot displays the 'Edit Existing Retail Producers' interface. At the top, a table lists retail producers with columns for ID, Name, and Address. The table is filtered by 'AGT0381'. The 'Edit' button is highlighted with a blue circle, and a mouse cursor is pointing at it. Below the table, the 'Retail Producer Info' section contains fields for ID, Name, Address Line 1, Address Line 2, City, State, and Zip. The 'Edit' button is also highlighted with a blue circle.

ID	Name	Address
AGT4280	A KALLBERG INS AGENCY INC	
ASI50882	A MILWAUKEE AGENCY INC	
AGT0015	A PLUS INSURANCE & FINANCIAL SERVICES, INC	
AGT0381	A+ INSURANCE SERVICES	

Filter grid by name, beginning with . [Filter]

Retail Producer Info

ID: AGT0381

Retail Producer Name: A+ INSURANCE SERVICES

Address Line 1: 8622 Idlewood Dr. S.W.

Address Line 2:

City: Lakewood

State: WA Zip: 98498


Buttons: New, Edit, Save, Cancel, Delete


Create & Manage a Policy

Creating a New Policy

1. From Dashboard, click 'New Policy'


Insurance Company
>Effective 1/1/2024 North American Capacity Ins. Co. NAIC# 25038 merged with Swiss Re Corporate Solutions Capacity Insurance Corp. NAIC# 34916

**Policy Search**
The Search section of WFP allows users to search for existing policy data. This screen grants access to general policy information, transactions, transaction status and confirmation numbers.

**New Policy**
The New Policy section of WFP allows you to submit a new policy. *


Renewal Policy
If the Policy Number is NOT changing, [Click Here.](#)
If the Policy Number is changing from an existing policy, [Click Here.](#)

Total Uncertified Transactions: 0

**Batch Submission**
[Batch Submit](#)
[Batch Submission Procedures](#)

2. Enter Policy Information from Declaration Page

HOME POLICIES TAGS STATEMENTS REPORTS USERS SETTINGS INBOX HELP LOGOUT

Policy Detail 

Policy Number

Broker

Retail Producer

Description of Coverage

Policy Effective Date

Expiration Date

Named Insured as Listed on Policy

Washington Location Address

City

State

ZIP

County of Risk

Insurer

Percentage

Add Insurer to Policy

100 %

Add

☐ Master Policy

☐ Exempt Commercial Purchaser

☐ Risk Purchasing Group

Multi-State

Comments (what's this?)

Add Policy Transaction

Transaction Type

Premium

Taxable Fees

Effective Date

Comments

SAMPLE POLICY DETAILS

Policy Details

Policy Number: ABC1000123
 Broker: ANDREA ABAD - 223300
 Retail Producer: AAA INSURANCE AGENCY (MAIN E)
 Description of Coverage: Description

Policy Effective Date: 1/1/2019
 Expiration Date: 1/1/2019
 Until Canceled: ☐

Named Insured as Listed on Policy: Sample Name

Washington Location Address: 1234 Main Street
 City: Seattle, State: WA, ZIP: 98101
 County of Risk: KING

Insurer: 3A LTD, Percentage: 100.0000 %
 Add Insurer to Policy: 100 %
 Master Policy: ☐
 Exempt Commercial Purchaser: ☐
 Risk Purchasing Group: ☐
 Multi-State: ☒
 Comments (what's this?):

Add Policy Transaction

Transaction Type	Premium	Taxable Fees	Effective Date	Comments
------------------	---------	--------------	----------------	----------

3. Don't Forget to Select Master Policy, Multi-State, Exempt Commercial Purchaser or Risk Purchasing Group
 - If Risk Purchasing Group – an additional text entry will appear for Risk Purchasing Group Name.
4. Choose a Transaction Type, Add Premium Amount, Taxable Fees and Effective Date
5. Upload Electronic Documents Associated with Transaction by Clicking Documents

AAA INSURANCE AGENCY (MAIN E)
 Description of Coverage: Description

Washington Location Address: 1234 Main Street
 City: Seattle, State: WA, ZIP: 98101
 County of Risk: KING

Master Policy: ☐
 Exempt Commercial Purchaser: ☐
 Risk Purchasing Group: ☒
 Risk Purchasing Group Name: Group Name
 Comments (what's this?):

Add Policy Transaction

Transaction Type	Premium	Taxable Fees	Effective Date	Comments
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Documents

Edit Save Cancel

6. Click Save
7. Click OK on the Certify Transaction Screen

Certify Transaction

You are adding a new initiating transaction (New Business or Renewal). All Initiating Transactions must be Certified before they can be reviewed and accepted by the SLA of Washington. This transaction is not considered filed with the OIC until certified.

Please take the final step and Certify this transaction. You can Certify a transaction by clicking the OK icon on the right side of the transaction list.

OK

Add Policy Transaction

Transaction Type	Premium
1 - NEW BUSINESS	1500

Edit Save Cancel

8. Click Printer Icon

City: SEATTLE State: WA ZIP: 98101
County of Risk: KING

☒ Risk Purchasing Group
Risk Purchasing Group Name: [GROUP NAME]
Comments (what's this?): [Text Area]

Confirmation Number	Cert. Number	Type	Status	Premium	Taxable Fees	Submit Date	Effect. Date	Regist. Date	Tax Year	Tax	Fee	
000001137169		New	Submitted ?	\$1,500.00	\$250.00	03/03/17	01/01/17			\$35.00 *	\$1.75 *	comments [Printer Icon]

* Estimated amount. Actual amount will be displayed upon registration by the SLA.

New Transaction Modify Transaction Backout/Delete Transaction

This transaction must be Certified before it can be reviewed by the SLA. Certify transactions by clicking the [Printer Icon] icon.

Edit Save Cancel

9. Review the Information on the Certification Screen for Accuracy

10. Click I have read the foregoing certification

11. Click 'I so certify'

GROUP NAME

5. Name and address of insured:
SAMPLE NAME, 1234 MAIN STREET SEATTLE, WA 98101

6. Effective Date or Binding Date (whichever is later): 01/01/2017

7. Brief statement of coverage (common trade terms may be used, e.g. D.I.C.):
DESCRIPTION

I have procured insurance from an unauthorized insurer or insurers, in accordance with the laws and regulations of the State of Washington under my surplus line broker's license. Details of such transactions are set forth above.

The insurance could not be procured, after diligent effort was made to do so from among a majority of the insurers authorized to transact that kind of insurance in this state, and placing the insurance in an unauthorized insurer(s) was not done for the purpose of securing a lower premium rate than would be accepted by any authorized insurer unless based on the loss and expense experience of the RPG or its members.

I certify that I am duly authorized to place this coverage on behalf of the insured, that the risk has been duly accepted by the insurer(s), and that the financial condition of the unauthorized insurer(s) before placing the insurance therewith meets or exceeds the financial requirements provided by law.

I certify that under the penalty of the suspension or revocation of my surplus line broker's license that the facts contained in this certification are true and correct.

☒ I have read the foregoing certification

I so certify


12. Your Transaction is Now Submitted to the Surplus Line Association of Washington.


Transactions

Creating New Transactions

1. From the Policy Dashboard click Policy Search


Insurance Company
>Effective 1/1/2024 North American Capacity Ins. Co. NAIC# 25038 merged with Swiss Re Corporate Solutions Capacity Insurance Corp. NAIC# 34916

[Policy Search](#)
The Search section of WFP allows users to search for existing policy data. This screen grants access to general policy information, transactions, transaction status and confirmation numbers.

[New Policy](#)
The New Policy section of WFP allows you to submit a new policy. *

[Renewal Policy](#)
If the Policy Number is NOT changing, [Click Here](#).
If the Policy Number is changing from an existing policy, [Click Here](#).

Total Uncertified Transactions: 0

 [Batch Submission](#)

[Batch Submit](#)

[Batch Submission Procedures](#)

2. Type in search criteria such as policy number, name of insured, etc.
3. Click Search.
4. Click Link for Policy.
5. Policy Details Page will Open.
6. Scroll Down for Policy Transaction History
7. Add a New Transaction by clicking Edit

8. Click New Transaction

9. Enter New Transaction Information Under Add Policy Transaction

Confirmation Number	Cert. Number	Type	Status	Premium	Taxable Fees	Submit Date	Effect. Date	Regist. Date	Tax Year	Tax	Fee	Comments
000001129260		New	Registered	\$1,753.00	\$100.00	02/25/13	03/16/12	02/25/13	2012	\$37.06	\$1.85	comments
000001129261		RP	Registered	(\$121.00)	\$0.00	02/25/13	03/16/12	02/25/13	2013	(\$2.42)	(\$0.12)	comments
000001129264		AP	Registered	\$50.00	\$0.00	02/25/13	06/15/12	02/25/13	2013	\$1.00	\$0.05	comments
000001129263		New	Registered	\$50.00	\$0.00	02/25/13	06/22/12	02/25/13	2012	\$1.00	\$0.05	comments
000001129265		AP	Registered	\$50.00	\$0.00	02/25/13	07/10/12	02/25/13	2013	\$1.00	\$0.05	comments
000001129266		RP	Registered	(\$408.00)	\$0.00	02/25/13	12/12/12	02/25/13	2012	(\$8.16)	(\$0.41)	comments

Description of Coverage
TEST

Washington Location Address
123 TEST ST.
City: SEATTLE State: WA ZIP: 98101
County of Risk: KING

Master Policy ☐ Multi-State ☒
Exempt Commercial Purchaser ☐
Risk Purchasing Group ☐
Comments (what's this?)

Confirmation Number	Cert. Number	Type	Status	Premium	Taxable Fees	Submit Date	Effect. Date	Regist. Date	Tax Year	Tax	Fee	Comments
000001129260		New	Registered	\$1,753.00	\$100.00	02/25/13	03/16/12	02/25/13	2012	\$37.06	\$1.85	comments
000001129261		RP	Registered	(\$121.00)	\$0.00	02/25/13	03/16/12	02/25/13	2013	(\$2.42)	(\$0.12)	comments
000001129264		AP	Registered	\$50.00	\$0.00	02/25/13	06/15/12	02/25/13	2013	\$1.00	\$0.05	comments
000001129263		New	Registered	\$50.00	\$0.00	02/25/13	06/22/12	02/25/13	2012	\$1.00	\$0.05	comments
000001129265		AP	Registered	\$50.00	\$0.00	02/25/13	07/10/12	02/25/13	2013	\$1.00	\$0.05	comments
000001129266		RP	Registered	(\$408.00)	\$0.00	02/25/13	12/12/12	02/25/13	2012	(\$8.16)	(\$0.41)	comments

* Estimated amount. Actual amount will be displayed upon registration by the SLA.

New Transaction Modify Transaction Backout/Delete Transaction

Edit Save Cancel

10. Click Save

11. Certify Transaction

Understanding Status

After Certifying a Transaction Status will Change to:

Submitted	Transaction has been submitted and is awaiting Examiner review.
Questioned	Examiner has reviewed and tagged the transaction. (see Tag Management section)
Registered	Examiner has reviewed the transaction and has found the transaction acceptable.

Modify Current Transaction

1. If the transaction is submitted but not yet registered and you need to modify, click Edit in the Policy Transaction History.
2. Select the Confirmation Number/Policy Number
3. Click Modify Transaction

The screenshot displays a web application interface for managing policy transactions. At the top, there are input fields for City (SEATTLE), State (WA), ZIP (98103), and County of Risk (KING). To the right, there are checkboxes for 'Master Policy', 'Exempt Commercial Purchaser', and 'Risk Purchasing Group', along with a 'Comments (what's this?)' text area.

The main section is titled 'Policy Transaction History' and contains a table with the following columns: Confirmation Number, Cert. Number, Type, Status, Premium, Taxable Fees, Submit Date, Effect. Date, Regist. Date, Tax Year, Tax, Fee, and actions (comments, print). Two transactions are listed:

Confirmation Number	Cert. Number	Type	Status	Premium	Taxable Fees	Submit Date	Effect. Date	Regist. Date	Tax Year	Tax	Fee	actions
000001137169		New	Submitted	\$1,500.00	\$300.00	03/03/17	01/01/17		2017	\$36.00 *	\$1.80 *	comments print
000001137207		New	Submitted	\$1,000.00	\$301.00	03/15/17	03/31/17		2017	\$200.00 *	\$1.30 *	comments print

A mouse cursor points to the first row of the table. Below the table, there is a note: '* Estimated amount. Actual amount will be displayed upon registration by the SLA.' At the bottom of the table, there are three buttons: 'New Transaction', 'Modify Transaction' (circled in blue), and 'Backout/Delete Transaction'. At the very bottom of the interface, there are three buttons: 'Edit', 'Save', and 'Cancel'.

Delete Transaction (unregistered)

1. If the transaction is submitted but not yet registered and you need to backout/delete - click the 'Backout/Delete Transaction Button'.
2. A pop-up will appear asking if you are sure you wish to delete the transaction.

Note: If you are deleting the only transaction on a policy, the entire policy will be deleted.

The screenshot shows the 'Policy Transaction History' table with the following data:

Confirmation Number	Cert. Number	Type	Status	Premium	Taxable Fees	Submit Date	Effect. Date	Regist. Date	Tax Year	Tax	Fee	Comments
000001137169		New	Submitted	\$1,500.00	\$300.00	03/03/17	01/01/17		2017	\$36.00 *	\$1.80 *	comments
000001137207		New	Submitted	\$1,000.00	\$301.00	03/15/17	03/31/17		2017	\$26.02 *	\$1.30 *	comments

* Estimated amount. Actual amount will be displayed upon registration by the SLA.

Buttons: New Transaction, Modify Transaction, Backout/Delete Transaction (circled), Edit, Save, Cancel.

Backing Out Registered Transactions

1. If the transaction has already been registered, you click the 'Backout/Delete Transaction' button.
2. A pop-up will appear, which will allow you to enter a reason for backing out the transaction.
3. Enter reason.
4. Click OK.

Managing Tags

What is a Tag?

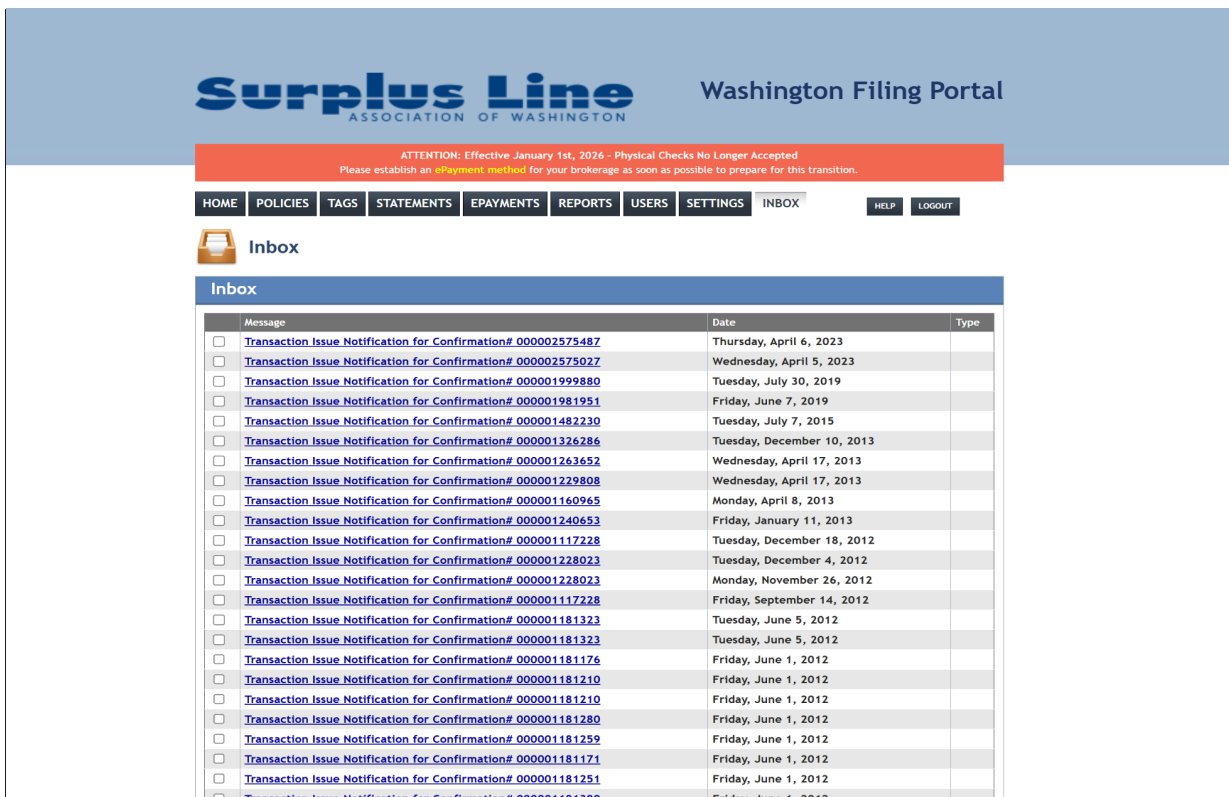
- If Washington Filing Portal or the Surplus Line Association of Washington Examiner finds an issue with your transaction, the transaction will be tagged.

How do I know if my transaction is tagged?

- You'll get a message in your inbox about the questioned transaction.

How do I check my tagged transactions?

1. You can select either the TAGS or INBOX tabs at the top of your dashboard.



The screenshot shows the Washington Filing Portal dashboard. At the top, there is a blue header with the "Surplus Line" logo and "ASSOCIATION OF WASHINGTON" text. To the right of the logo is the text "Washington Filing Portal". Below the header is a red banner with white text: "ATTENTION: Effective January 1st, 2026 - Physical Checks No Longer Accepted. Please establish an ePayment method for your brokerage as soon as possible to prepare for this transition." Below the banner is a navigation bar with tabs: HOME, POLICIES, TAGS, STATEMENTS, EPAYMENTS, REPORTS, USERS, SETTINGS, INBOX, HELP, and LOGOUT. The INBOX tab is selected. Below the navigation bar is a section titled "Inbox" with a list of messages. Each message is a "Transaction Issue Notification for Confirmation#" followed by a confirmation number, a date, and a type.

Message	Date	Type
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000002575487	Thursday, April 6, 2023	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000002575027	Wednesday, April 5, 2023	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001999880	Tuesday, July 30, 2019	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001981951	Friday, June 7, 2019	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001482230	Tuesday, July 7, 2015	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001326286	Tuesday, December 10, 2013	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001263652	Wednesday, April 17, 2013	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001229808	Wednesday, April 17, 2013	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001160965	Monday, April 8, 2013	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001240653	Friday, January 11, 2013	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001117228	Tuesday, December 18, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001228023	Tuesday, December 4, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001228023	Monday, November 26, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001117228	Friday, September 14, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181323	Tuesday, June 5, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181323	Tuesday, June 5, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181176	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181210	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181210	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181280	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181259	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181171	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181251	Friday, June 1, 2012	
<input type="checkbox"/> Transaction Issue Notification for Confirmation# 000001181380	Friday, June 1, 2012	

2. After you've selected the transaction, you can see tag details by clicking the question mark next to 'Questioned' on your Policy Transaction History.

Policy Number: TEST000

Broker: JOSHUA STARLING - 654561

Retail Producer: [dropdown]

Description of Coverage: SDSOSD

Policy Effective Date: [dropdown] Expiration Date: 5/7/2015 ☐ Until Canceled

Named Insured as Listed on Policy: SDSOSD

Washington Location Address: SDSOS

City: DSOSDSOS State: WA ZIP: 33333

County of Risk: FRANKLIN

Insurer: ACE SEGUROS S.A. Percentage: 100.0000 % [remove](#)

Add Insurer to Policy: 100 % 0 % [Add](#)







☐ Master Policy ☒ Multi-State

☐ Exempt Commercial Purchaser

☐ Risk Purchasing Group

Comments (what's this?): [text area]

Policy Transaction History

Confirmation Number	Cert. Number	Type	Status	Premium	Taxable Fees	Submit Date	Effect. Date	Regist. Date	Tax Year	Tax	Fee			
000001133208		RP	Questioned 	\$1,000.00	\$0.00	07/14/15	05/07/15		2015	(\$20.00) *	(\$1.00) *	comments		
000001133207		Canc	In Process 	\$1,000.00	\$0.00	07/14/15	05/07/15			(\$20.00) *	(\$1.00) *	comments		

* Estimated amount. Actual amount will be displayed upon registration by the SLA.

[New Transaction](#) [Modify Transaction](#) [Backout/Delete Transaction](#)

[Edit](#) [Save](#) [Cancel](#)

3. A pop-up will appear, which will specify the exact issues found with your transaction.
4. Correct items as necessary or contact the Examiner listed on the pop-up for additional clarification
5. Once you've addressed the tag(s) and clicked "Update", the Examiner will re-review the transaction. If the transaction is found to be acceptable, the status will change to registered.

What if a transaction is questioned, but hasn't been reviewed by an examiner?

- Sometimes Washington Filing Portal will automatically detect an issue with a transaction you've processed. When this happens, you'll see a blue question mark next to the status 'In Process'.
- Click the question mark to learn why the transaction was questioned by the system.

Batch Filing

Washington Filing Portal allows users to submit a batch upload with multiple transactions at once.

1. Create a .XML file with all policies and transactions.
 - There are specific details that must be correct when creating this file.
 - If one transaction is incorrect, the entire batch is rejected.
 - To help your brokerage create an accurate .XML file, the Surplus Line Association of Washington has created a batch submission manual


https://www2.surpluslines.org/docs/SLAofWA_Batch_Submission_Manual_Brokerages.pdf

2. Review the SLA of Washington batch submission manual and ensure your .XML file meets all specified requirements.
3. Login to the Washington Filing Portal test site to submit a test batch upload.
 - The Association has created a separate test environment to review and verify the integrity of your batch (<https://wfp-test.surpluslines.org>).
 - Use your same Admin User login credentials from the Production/Live site.
 - For any assistance, contact slawash-support@kikoda.com.

4. Submit through Washington Filing Portal under the Batch Submit link.


Insurance Company
>Effective 1/1/2024 North American Capacity Ins. Co. NAIC# 25038 merged with Swiss Re Corporate Solutions Capacity Insurance Corp. NAIC# 34916

Total Uncertified Transactions: 0

 Batch Submission


[Batch Submit](#)

[Batch Submission Procedures](#)



Policy Search

The Search section of WFP allows users to search for existing policy data. This screen grants access to general policy information, transactions, transaction status and confirmation numbers.



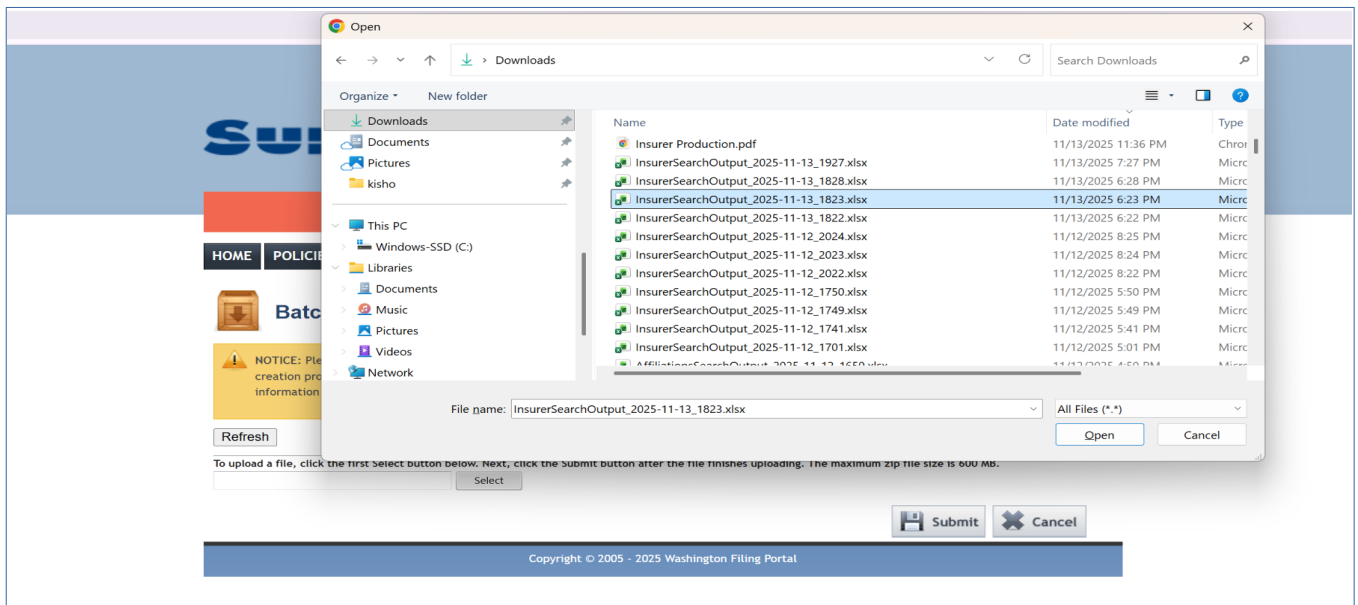
New Policy

The New Policy section of WFP allows you to submit a new policy. *

Renewal Policy

If the Policy Number is NOT changing, [Click Here.](#)
If the Policy Number is changing from an existing policy, [Click Here.](#)

5. Click the select button.





The screenshot shows the Washington Filing Portal interface. A file selection dialog is open, displaying a list of files in the Downloads folder. The file 'InsurerSearchOutput_2025-11-13_1823.xlsx' is selected. The file name is entered in the 'File name' field. The 'Open' button is visible. Below the dialog, there is a 'Select' button and a 'Submit' button. A notice at the bottom states: 'To upload a file, click the first select button below. Next, click the submit button after the file finishes uploading. The maximum zip file size is 600 MB.' The footer of the portal reads 'Copyright © 2005 - 2025 Washington Filing Portal'.

6. Choose .XML file.

7. Click Upload.

- You'll see a confirmation message at the top of the screen.
- As the Surplus Line Association of Washington reviews your submission, you'll be able to see the batch's status under 'File Status'.

**System Success**
The selected document was uploaded successfully.
Upload Document action successful.

Please remember that you will have to certify the batch once your submission has been accepted.

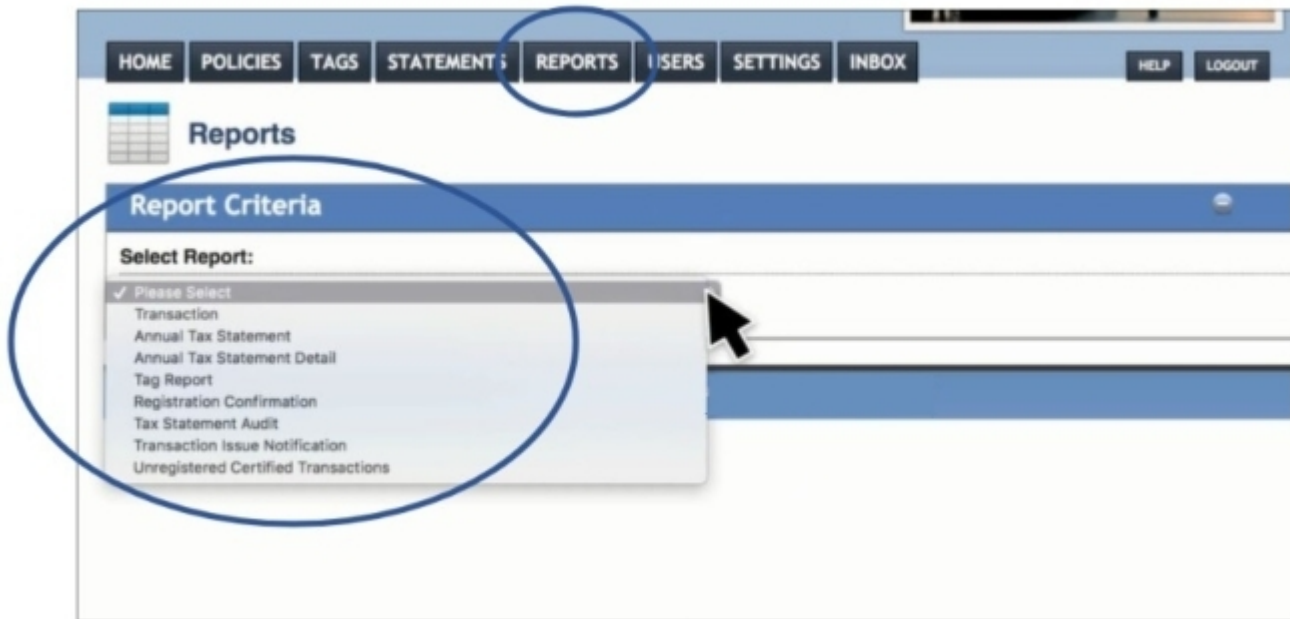
File Name	Received Date	File Status	Action
batch test.zip	03/24/2017 07:24:31 AM	Received	
batch upload.zip	03/24/2017 06:43:14 AM	Rejected for Import	
7998_corrected.zip	12/13/2016 07:42:49 AM	Rejected for Import	
test_upload.zip	11/29/2016 08:17:02 AM	Rejected for Import	
test06292016.zip	06/29/2016 07:06:36 AM	Rejected for Import	
zipsTest.zip	04/20/2016 07:45:36 AM	Submission Accepted	Certify Batch/Generate Affidavits
Files.zip	08/27/2015 07:52:22 AM	Rejected for Import	
PortMon.zip	03/13/2015 08:47:36 AM	Rejected for Import	
Batch File 1.zip	03/12/2015 01:18:10 PM	Rejected for Import	
WABatch.xml	08/01/2014 05:40:19 AM	Received	

To upload a file, click the button below. Click "Upload" to submit the file.

8. Once the submission is accepted, you'll need to certify the batch by clicking 'Certify Batch/Generate Affidavits' under the Action column.

Reports

1. Click the REPORTS tab.



Transactions	<p>Transactions that have been submitted, reviewed by an examiner, and registered as acceptable in a given month.</p> <p>**If a transaction is submitted, but not registered, it will not be displayed on this report.</p>
Annual Tax Statement	<p>Shows the premium and fees on which taxes are computed.</p> <p>DOES NOT SHOW ANNUAL TAXES</p>
Annual Tax Statement Detail	<p>Policies, premiums and fees for the year.</p> <p>Generated automatically by Washington Filing Portal on February 1st annually.</p> <p>User can run the report at any time for any period of time.</p>
Tag Report	<p>Details transactions submitted, but not yet registered and transactions that have been tagged.</p>
Registration Confirmation	<p>A copy of all emails sent to the brokerage confirming registration of a transaction.</p>
Tax Statement Audit Report	<p>Shows changes made to the tax year, premium and/or fees.</p>
Transaction Issue Notification	<p>A copy of emails sent for tagged and/or questioned items.</p>
Unregistered Certified Transactions	<p>All initiating transactions for the selected year that have been included on the Tax Statement based on the date certified, but that have not yet been registered.</p>

FAQ'S

1. Does the Surplus Line Association of Washington require filings be made electronically?

Yes. However, if you are unable to submit documents electronically, please contact info@surpluslines.org for support with your filing.

2. How do I create my Washington Filing Portal user account?

Washington Filing Portal user accounts are created and maintained by your brokerage's administrator. Washington Filing Portal brokerage administrators are created by the Surplus Line Association of Washington.

3. Can I modify a Policy Number?

Yes, a policy number may be modified, provided the policy in question has no other registered transactions. If you need to change the policy number on a policy that contains other registered transactions, then a new policy record should be created.

4. What is a registered transaction?

A policy transaction is registered if it has been reviewed by the Surplus Line Association of Washington, deemed to be properly reported and accepted.

5. What is included in Policy Fees?

Policy fees include all taxable fees associated with a transaction but do not include a stamping fee.

6. What policy documentation do I need to submit?

The Surplus Line Association of Washington requires the following documents:

- Declarations Sheet
- Supplemental Declarations Sheets (if applicable)
- Service of Suit
- Forms List

The Surplus Line Association of Washington requests that you do not send the entire policy, but only the required documents listed above.

7. Will system users from other brokerages be able to view or access my data?

No, the data your brokerage submits through Washington Filing Portal is secure and is only accessible to your brokerage's Washington Filing Portal users.

8. Am I required to use the certification generated from the Washington Filing Portal?

Yes, the system generated certification is produced specifically for you by Washington Filing Portal and contains a barcode that is essential to the processing of incoming filings at the Surplus Line Association of Washington office.

9. Is there a way to bulk upload a list of Retail Producers into the Washington Filing Portal?

Yes, this can be accomplished by populating the following Excel spreadsheet with your retail producers and e-mailing it to the Surplus Line Association of Washington where it will be uploaded to the database. The excel template can be found [here](#).

10. How do I request an insurer to be added to the active insure list on the Washington Filing Portal?

Send us the Insurer's Financial Information for review. A list of required documents can be found on our website