

NORTH CAROLINA SURPLUS LINES ASSOCIATION



SLIP SETUP INSTRUCTIONS



If you have any questions, please email
contact@ncsla.com.

UPDATED MAY 2025



SLIP Setup Instructions

Welcome to SLIP! Prior to submitting policy data in SLIP, you will need to complete some preliminary information, including creating users, adding insurers, and selecting an agency.

STEP ONE • CHANGE PASSWORD

SLIP users can change their system generated passwords upon logging into SLIP for the first time. The steps for changing the SLIP user account password are below:

1. Go to the *User Admin* tab on the navigation bar and select *Change Password*.
2. Enter your current password in the *Old Password* box.
3. Enter a new password in the *New Password* box and re-enter the new password in the *Re-enter New Password* box.
 - a. Passwords must be at least 8 characters long and no more than 128 characters. Any combination of letters, numbers or special characters are accepted.

STEP TWO • CREATING SLIP USERS

SLIP allows an agent to designate representatives to view, submit and edit policy data on their behalf. A SLIP user is associated with the agent account under which they are created, and they cannot access any other agent account in SLIP. A SLIP user must have a unique SLIP account for each surplus lines licensee for which they are responsible for reporting data.

TO ADD A NEW USER

1. Go to the *User Admin* tab on the navigation bar and select *User Data*.
2. Click the *Add New User* button located at the top right corner of the user screen.
3. Enter data in the required fields for the new user, including assigning a username for their SLIP account.
4. Assign a security role for the new user according to the permissions outlined below.
 - **Administrator** – Allows access to all areas of SLIP. Filings can be submitted, invoices can be paid, users can be created, and account settings can be updated. This security level has the ability to add, edit, and delete user data.
 - **Edit & View** – This role allows a user to enter, edit and view policy data. This security level does not have the ability to add, edit or delete user data.
 - **View** – This role allows a user to view policy data only. No edits can be made to transaction data, billing contact, or SLIP users.
5. Select the preferred format for your billing reports (PDF or CSV).
6. Click “Save” when the *User Details* information is complete.
7. An email will be sent to the new user with their NCSLA SLIP username and password.

STEP THREE • SLIP SETTINGS

Before reporting policy data, users will need to select North Carolina eligible insurance companies they do business with, assign themselves to a licensed North Carolina agency, and select a billing contact for accounting related inquiries. To access the SLIP Settings page, go to the User Admin tab and select Settings.

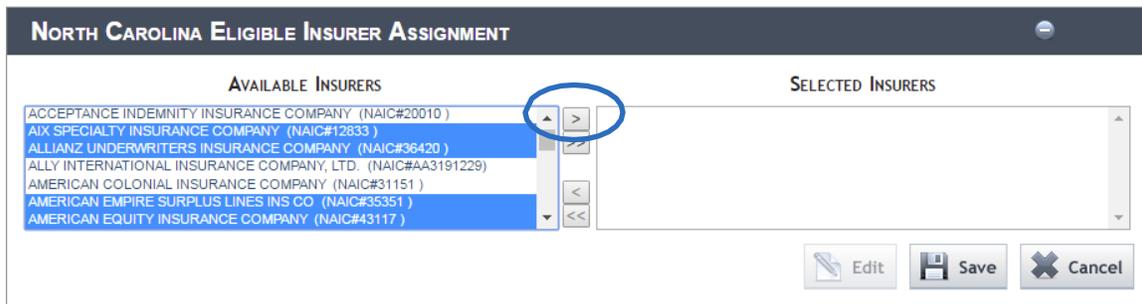
TO ASSIGN INSURERS

SLIP allows users to customize and manage their list of insurers in the *Insurer Assignment* section of the *Settings page*. Insurers on the *Selected Insurers* list should be the companies the agent places business with. Only insurers on the *Selected Insurers* list will appear in the Insurer dropdown box when submitting a transaction.

To select insurers, click the *User Admin* tab on the navigation bar and select *Settings*.

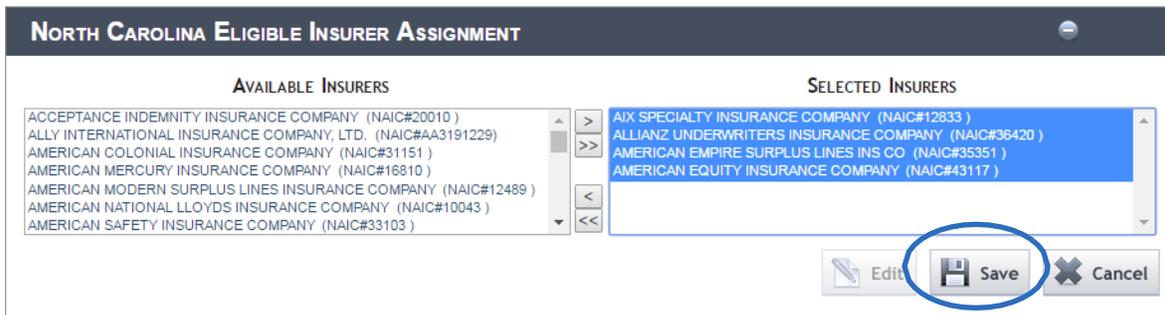
1. Click the *Edit* button at the bottom right of the *North Carolina Eligible Insurer Assignment* box.
2. Click on the insurer name(s) in the *Available Insurers*, and then click the single arrow (>) pointing towards the *Selected Insurers* box. Multiple insurers can be selected by holding the CTRL key down while clicking on the insurers you wish to select. To remove an insurer from the *Selected Insurers* list, click on the insurer and click the single arrow (<) pointing towards *Available Insurers* box.
3. Clicking the double arrow (>>) will move all insurers to the *Selected Insurers* list. To remove all insurers from the *Selected Insurers* list, click the double arrow (<<) pointing towards *Available Insurers* box.
4. Once you have selected all of your insurers, click *Save*.

If the insurance company does not appear on the *Available Insurers* list, please contact the NCSLA staff at (919) 746-8415, or by email at contact@ncsla.com.



AVAILABLE INSURERS	SELECTED INSURERS
ACCEPTANCE INDEMNITY INSURANCE COMPANY (NAIC#20010)	
AIX SPECIALTY INSURANCE COMPANY (NAIC#12833)	
ALLIANZ UNDERWRITERS INSURANCE COMPANY (NAIC#36420)	
ALLY INTERNATIONAL INSURANCE COMPANY, LTD. (NAIC#AA3191229)	
AMERICAN COLONIAL INSURANCE COMPANY (NAIC#31151)	
AMERICAN EMPIRE SURPLUS LINES INS CO (NAIC#35351)	
AMERICAN EQUITY INSURANCE COMPANY (NAIC#43117)	

EDIT **SAVE** **CANCEL**

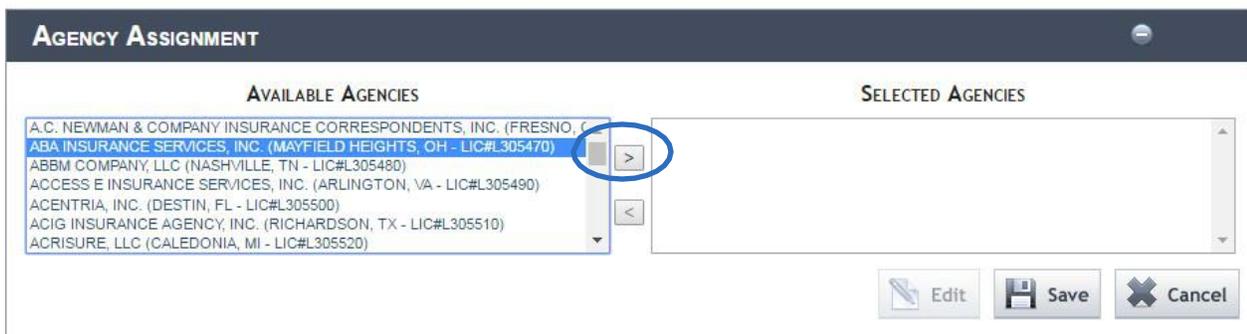



TO ASSIGN AN AGENCY

Each individual licensee reporting business is required to be associated with a surplus lines agency licensed by the state of North Carolina. To associate the individual licensee with the agency they are writing business for, click the plus sign (+) on the right side of the bar that says *Agency Assignment* on the *Settings* page.

1. Click the *Edit* button at the bottom right of the *Agency Assignment* box.
2. Click on the agency name in the *Available Agencies* box, and then click the single arrow (>) pointing towards the *Selected Agencies* box. To remove an agency from the *Selected Agencies* list, click on the insurer and click the single arrow (<) pointing towards *Available Agencies* box.
3. Once you have selected your agency, click *Save*.

If your agency does not appear on the *Available Agencies* list, please contact the NCSLA staff at (919) 746- 8415, or by email at contact@ncsla.com.



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SETTINGS

AGENCY ASSIGNMENT

AVAILABLE AGENCIES	SELECTED AGENCIES
A.C. NEWMAN & COMPANY INSURANCE CORRESPONDENTS, INC. (FRESNO, CA) ABBM COMPANY, LLC (NASHVILLE, TN - LIC#L305480) ACCESS E INSURANCE SERVICES, INC. (ARLINGTON, VA - LIC#L305490) ACENTRIA, INC. (DESTIN, FL - LIC#L305500) ACIG INSURANCE AGENCY, INC. (RICHARDSON, TX - LIC#L305510) ACRISURE, LLC (CALEDONIA, MI - LIC#L305520) ADVANCED E OF FLORIDA, INC. (HOLLYWOOD, FL - LIC#L305530)	ABA INSURANCE SERVICES, INC. (MAYFIELD HEIGHTS, OH - LIC#L305470)

ASSISTANCE

For SLIP assistance, please visit the SLIP Tutorials at <http://www.ncsla.com/tutorials/>. Or you may contact us at (919) 746-8415, or by email at contact@ncsla.com.