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Introduction

The purpose of this Guide is to help members understand how to file their Quarterly Surcharge Remittance Form ("QSR"). FIGA designed this process with the members in mind to make the reporting and remittance process simple to use and efficient for FIGA’s staff to track completion of QSRs and the collection of funds remitted. DocuSign is the platform that makes this all happen seamlessly.

Process Overview

We understand not all members share the same approval policy. With DocuSign, member companies can either submit their completed QSRs via the automated reporting process or “Print and Sign” a hard copy of the QSR for those members that require wet signatures. What if you receive email notice and you are not authorized to sign and submit? Well, DocuSign has that covered too with a feature that allows you to assign the electronic form to someone else to complete. This Guide will help you navigate through our reporting process efficiently while remaining compliant with any internal reporting practices your company may have.

Before we begin diving into the step by step process, here is a high level overview of how the FIGA reporting and remittance process works.
Submitting a Quarterly Surcharge Remittance via DocuSign

Step 1: To begin the reporting process, open the email sent via DocuSign and click on REVIEW DOCUMENTS.
Step 2: Click checkbox to agree to sign electronically and click CONTINUE. Later you will be able to Print and Sign if your company’s approval policy requires a wet signature.

Step 3: Verify and update company and contact information. Any contact information [highlighted fields] updated on the QSR will automatically update in our system once it has been received and processed. Please note that the required format for phone number is 999.999.9999 when updating this field. Any other format will cause an error and can delay the processing of your QSR.
Step 4: Enter Direct Assessable Premiums Collected to calculate the surcharge due.

Step 5: Read the special instructions regarding premium. Reporting can be suspended (by written request) if your company will not write any premium during the Assessment Period, however the initial and annual reconciliation filings (of zero dollars) are still required.
Step 6: Complete the **Title** section and click the **Sign** button. The date will be timestamped with the current date.

![Signature section](image)

Step 7: Enter your full name and initials and select your preferred digital signature style. Next click, **ADOPT AND SIGN** and then **FINISH** to complete the reporting process.

![Signature confirmation](image)

Ready to Finish? You've completed the required fields. Review your work, then select **FINISH**.
Step 8: DocuSign returns the completed QSR to the recipient’s email so that it can be used to process the surcharge payment due to FIGA via check, wire, or ACH transfer using your normal disbursement process.

Downloading Documents In Process

DocuSign also allows you to download a partially completed QSR before signing and submitting it. Simply click the Download icon in the top center toolbar to download it to your local machine. For documents with multiple pages, you have the option of downloading separate files for each page or one combined file.
The downloaded QSR will be stamped with a watermark of “In Process” to indicate that it has not finished the process.
Finishing Later

DocuSign allows you to save an incomplete QSR and finish it later when necessary via very simple steps.

Step 1: Under the OTHER ACTIONS drop-down, click Finish Later.

Any information you’ve entered or updated will be saved and you will then be navigated to the following page:
Step 2: Go back later to finish submitting the QSR using the original DocuSign link. Continue with the remaining How to Submit an Assessment Quarterly Surcharge Remittance steps to submit the QSR.

Assigning a Quarterly Surcharge Remittance to Someone Else

The QSR is distributed via DocuSign to the contact FIGA has in its system for that company. FIGA exerts great effort to maintain a current contact list of all its members, but changes do occur. That is okay. Follow the steps below to assign a QSR to someone else.

Step 1: Under the OTHER ACTIONS drop-down, click Assign to Someone Else to route the QSR to someone else.
Step 2: Enter the new recipient’s name and email address. Adding a reason is optional but is strongly recommended. Next, click the **ASSIGN** button to complete the process. **Please be advised that any data entered on the QSR by the original signer WILL NOT BE SAVED.**

The new recipient should now have the QSR in their email inbox. **Please be advised that the original DocuSign link will no longer be active and inaccessible to the original recipient. This action cannot be reversed.** If done in error, you will have to repeat the **How to Assign Quarterly Surcharge Remittance to Someone** steps again.
Print and Sign a Quarterly Surcharge Remittance

What happens if your company’s practice doesn’t allow you to sign the QSR electronically? DocuSign has you covered. Here is what you should do to Print and Sign a QSR within DocuSign.

**Step 1:** Follow steps 1 through 5 under How to Submit a Quarterly Surcharge Remittance above.

**Step 2:** Click Print & Sign under OTHER ACTIONS to download the completed QSR ready for a wet signature.

**Step 3:** Select how you would like to return the signed QSR and click the CONTINUE button.
Step 4: Click **DOWNLOAD** to download a copy of the completed QSR to store on your local computer. Manually sign and date the QSR, enter your Title, and then click **RETURN DOCUMENT** to proceed with returning the document.
Step 5: To upload the QSR, click **UPLOAD A FILE** and attach the signed QSR from your local computer.

Step 6: To complete the process, click **FINISH**. A copy of your Printed and Signed QSR will be delivered to the recipient’s email.
How to Make a Surcharge Payment

Step 1: Locate the surcharge payment due on the line **AMOUNT DUE (CREDITED)**

<table>
<thead>
<tr>
<th>REPORTING QUARTER:</th>
<th>ASSESSMENT YEAR Policy Effective (Inception) Date Range</th>
<th>ASSESSMENT CALCULATION (See Instructions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2022 - 03/31/2022</td>
<td>01/01/2022 - 12/31/2022</td>
<td></td>
</tr>
</tbody>
</table>

1. **DIRECT ASSESSABLE PREMIUMS COLLECTED**: 7896553
2. **ASSESSMENT/SURCHARGE RATE**: 0.007
3. **TOTAL ASSESSMENT SURCHARGE COLLECTED & REMITTED (1 * 2)**: 552,766
4. **BALANCE FORWARD**: 0
5. **AMOUNT DUE (CREDITED)**: 552,766

Step 2: Wire (preferred method) or mail funds to FIGA using the instructions below. **Please note that there are two sets of instructions listed specific to each Assessment that has been levied.**

**FIGA 0.7% Assessment** (Levied October 2021)

Member Insurers may wire funds or send ACH payments directly to FIGA as follows:

<table>
<thead>
<tr>
<th>WIRE</th>
<th>ACH PAYMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acct Name: Florida Insurance Guaranty Association</td>
<td>Acct Name: Florida Insurance Guaranty Association</td>
</tr>
<tr>
<td>Account Number: 2121080820446</td>
<td>Account Number: 2121080820446</td>
</tr>
<tr>
<td>Bank: Wells Fargo Bank, N.A.</td>
<td>ACH Routing Number: 121000248</td>
</tr>
<tr>
<td>ABA Number: 121000248</td>
<td>Account Number: 2121080820446</td>
</tr>
</tbody>
</table>

Alternatively, Member Insurers may mail checks to:

**Florida Insurance Guaranty Association, Inc.**
PO Box 14249 | Tallahassee, FL 32317
FIGA 1.3% Assessment (Levied March 2022)

Member Insurers may wire funds or send ACH payments directly to FIGA’s Bank Trustee as follows:

<table>
<thead>
<tr>
<th>WIRE</th>
<th>ACH PAYMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acct Name: FL INS GUARANTY ASSOC ESCROW FUND</td>
<td>Acct Name: FL INS GUARANTY ASSOC ESCROW FUND</td>
</tr>
<tr>
<td>Account Number: 4637688400</td>
<td>ACH Routing Number: 021000018</td>
</tr>
<tr>
<td>Bank: The Bank of New York Mellon, NY, NY</td>
<td>Account Number: 4637688400</td>
</tr>
<tr>
<td>ABA Number: 021000018</td>
<td></td>
</tr>
</tbody>
</table>

Alternatively, Member Insurers may mail checks to:

Florida Insurance Guaranty Association, Inc.
PO Box 14249 | Tallahassee, FL 32317

Frequently Asked Questions (FAQ)

Visit the following links to view more detailed information and Frequently Asked Questions regarding the FIGA Assessments.

https://figafacts.com/assessments/
https://figafacts.com/frequently-asked-questions/