



THIRD-PARTY ADMINISTRATORS (TPA) LICENSE RENEWAL INSTRUCTIONS

Effective November 1, 2014, the Oklahoma Insurance Department (OID) will require Third-Party Administrators (TPA) to file all renewal applications electronically per Title 36 O.S. Section 350, Title 36 O.S. Section 1450, and Order No. 14-0995-PRJ.

PAPER FILINGS AND CHECKS WILL NO LONGER BE ACCEPTED.

OPTins Electronic filing instructions:

- Register and/or Login with OPTins at http://www.optins.org/regulated_entities_OK.htm or by calling 816-783-8500. **NOTE: Registration can take several weeks to complete.**
- Once registered, select the "Filings" tab, then "Create Filing," enter the filing year, select "Oklahoma Regulated Entities" as the state, and choose "Third Party Administrator and Firm ("Individual" when the individuals are organized as a Partnership), then Renewal application.
- Open the application which is in an Excel file format, review, complete the Checklist and Application (see the tabs at the bottom of the Excel table), save the file in the most recent version of Excel, and then upload it back into OPTins at the same location.
- Proceed to the payment screen to submit your payment (\$100 Application Fee, add \$10 if amending the Service of Process form) – Note: OPTins will add in their \$10 processing fee automatically once your filing has completely been submitted. However, they will not charge a fee again if you have to go back later to amend the application. **The application will not populate the OID side of OPTins until the money has processed through your bank and the filing will be dated at the time the fee processes through your bank, so you will want to watch this to assure the payment has gone through your account.**

The following items are required for the Electronic TPA License Renewal filing:

- Completed Online Renewal Application
- TPA Surety Bond – Include the bond continuation certificate/verification form or proof that the bond has been renewed for the Third Party Administrator surety bond. (If the bond has been changed, please attach a copy of the new bond.)
- Proof of Third Party Licensure in Home State – If home state does not license TPAs please indicate a home state and provide proof (Certificate of Good Standing or a screen shot/snippet of the licensing database reflecting the current date you capture screen shot/snippet) the TPA is licensed there. Please see TITLE 36 O.S. § 1450(B) for home state requirements.
- A list of names and addresses of the insurers and/or funds the TPA has contracted with in accordance with Title 36 O.S. §1450(E). (Agreements are not required to be submitted to the OID).
- Copy of any administrative action(s) from any state since last renewal (if not already submitted) and summarized response regarding the details and outcome of the action, including proof of any assed payment required resulting from the action(s).
- Fee of \$100 per license, if late add \$100 for late fee, see TITLE 36 O.S. § 1450(E). **NOTE: There is an electronic processing fee assessed by OPTins when the filing has completely been submitted to OPTins.**
- Fee of \$10 for any amended Service of Process form and an Amended Service of Process form.

All questions regarding OPTins will need to be directed to OPTins at 816-783-8500.

All other questions should be directed to the Oklahoma Insurance Department, Regulated Industry Services Division, jeanette.pearce@oid.ok.gov, 405-521-6651.