



PURCHASING GROUP (PG) NEW APPLICATION INSTRUCTIONS

Effective November 1, 2016, the Oklahoma Insurance Department (OID) will require Purchasing Groups (PG) to file all new applications electronically per Title 36 O.S. Section 350, Title 36 O.S. Section 1450, and Order No. 14-0995-PRJ.

OPTins Electronic filing instructions:

- Register and/or Login with OPTins at www.optins.org or by calling 816-783-8990. NOTE: Registration can take up to two (2) weeks to complete.
- Once registered, select the "Filings" tab, then "Create Filing," enter the filing year, select "Oklahoma Regulated Entities" as the state, choose "Purchasing Group" as the Entity Type, and choose "Initial Election" as the Filing Period Type.
- Download the New Application form, complete, and then upload it along with all other required documentation. See "New Purchasing Group Checklist" below.
- Proceed to the payment screen to submit your payment

All questions regarding OPTins will need to be directed to OPTins at 816-783-8990. All other questions will continue to be directed to the Oklahoma Insurance Department, Financial Division, Donald Ashwood, 405-522-2374.

OKLAHOMA INSURANCE DEPARTMENT

Financial Division

PURCHASING GROUP – CHECK LIST (Title 36 O.S. § 6453-§ 6468)

For New Application

Name of Purchasing Group: _____

_____ **FEIN#** _____

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(for Departmental use: check the items received)

- ___ 1. Notice and Registration.
- ___ 2. All lines on the Registration Form were completed, signed / dated electronically by the Secretary and President.
- ___ 3. Received **\$400** registration fee.
- ___ 4. If a new application only: Received Designation of Agent (UCAA Form) and **\$10 fee**. Further Handling – Summary Info. to NAIC_____
- ___ 5. Does line 13 indicate who will be responsible for payment of premium taxes? If an agent or surplus lines broker was reported on line 13, is the agent/broker licensed in Oklahoma? License # _____ Is the agent appointed by the insurer?
- ___ 6. Has the Company's President & Secretary signed the Agent for Service of Process form with the Board of Directors Resolution received and signed by the Purchasing Group's Secretary?
- ___ 7. Was a "**certified**" certificate of compliance received from the Purchasing Group's state of domicile? And does the name on the Application agree with the Certificate of Compliance?
- ___ 8. If an insurer, broker, or risk retention group is shown on line 12, is the company licensed in Oklahoma? License # _____
- ___ 9. If any item under line 15 is answered "yes" attach a separate letter of explanation.

File is complete: _____ Date: _____ Reviewed by: _____ Date: _____

Approved by: _____ Date: _____