



COMMISSIONER OF SECURITIES AND INSURANCE

James Brown
Commissioner

Office of the
Montana State Auditor

IMPORTANT CLARIFICATION REGARDING MONTANA SURPLUS LINES SUBMISSIONS

October 15, 2026

Overview

This bulletin clarifies which systems producers should use when submitting surplus lines filings and completing associated tax and fee payments in Montana.

Use of the Legacy Portal

Only use the **Legacy Portal** for filings meeting all the following criteria:

- Is a cancellation or endorsement
- Is associated with a policy previously submitted through the Legacy Portal prior to March 1, 2026
- Is associated with a policy with an effective date in 2025

All qualifying Legacy Portal filings must be submitted by **February 28, 2027**.

All other surplus lines filings must be submitted through **SLIP+ for States**.

Submissions With Effective Dates Prior to January 1, 2026

Beginning **November 1, 2026**, SLIP+ for States will also accept Montana filings with effective dates prior to **January 1, 2026**.

Filings with effective dates prior to January 1, 2026:

- **Will not** incur SLIP+ transaction fees
- **Will** be assessed all applicable premium and fire taxes

For filings with effective dates **before January 1, 2022**, producers must contact SLIP+ support.

Incorrect System Submissions

If filings were submitted in the Legacy Portal but should have been entered into SLIP+ for States, CSI will be reaching out to producers with instructions for resubmission.

Tax Payments for Legacy Portal Filings

Invoices for **Tax Year 2026** Legacy Portal submissions will be available in the Legacy Portal beginning **March 1, 2027**.

Legacy Portal invoices must be paid via **Optins** by **April 1, 2027**.

All other invoices and payments must be conducted through **SLIP+ for States** according to the [Surplus Lines Premium and Fire Tax Payment and Transaction Fee Schedule \[csimt.gov\]](#).

Contact Information

For questions or additional assistance:

SLIP+ Support

- Email: info@slipplus.com
- Phone: (877) 267-9855, Option 1

CSI Producer Licensing

- Email: csi.producerlicensing@mt.gov
- Phone: (406) 444-2020

CSI Surplus Lines Website

Visit: <https://csimt.gov/insurance/surplus-lines/> [csimt.gov]

Office Information

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