

# Premium Pro FormsPlus – Form Submittal Sheet

Use this sheet when submitting a form for inclusion into FormsPlus. Type N/A into any field you cannot complete. Complete one sheet for each form submitted. Forms must comply with the FormsPlus submittal policy (see page 2) in order to be accepted. Send an electronic form and instructions if available (to help us more quickly identify it).

## Form Information:

Form Name: \_\_\_\_\_

Website (web link) where form can be found:  
\_\_\_\_\_

Form Due Date: \_\_\_\_\_

Are Form Instructions available?      Yes      No       Yes

Agency/Payee Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Agency Contact Name/Phone: \_\_\_\_\_

Company Type:      Life      PC      Both

## Your Information

Name and Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Company Name: \_\_\_\_\_

Comments:  
\_\_\_\_\_  
\_\_\_\_\_

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# Forms Submittal Policy

The following policy is effective April 9, 2010 and supersedes the policy enacted on November 24, 2009. Changes have been made to item 2 to clarify the policy.

FormsPlus is comprised of forms requested by TriTech clients. You may request that additional forms be added. Forms submitted must meet the following criteria to be considered:

1. Any form filed with and created by a state or territorial government insurance, tax, revenue, treasury, or finance agency will be considered for inclusion. The form must be made directly available to TriTech from the agency or its website.
2. Forms filed with and created by a worker's comp agency or organization pursuant to state statute (Fair Plan, Surplus Lines Assoc, Mine Subsidence Fund, etc.) will be considered. The form must be posted on the organization's website in electronic format (**PDF, document, or spreadsheet**). Forms that have been **scanned** into a PDF will not be considered. Access to the form cannot be password protected. If the form does not meet these requirements, TriTech may consider the form if:
  - a) You contact the organization and they agree to provide the form to TriTech on a periodic basis as needed in electronic format (as defined above).
  - b) It must be a generic form that can be used by all insurance companies.
3. Forms from foreign countries, such as Canada, may be considered for inclusion subject to the criteria in number 2 above.
4. Requests to add a territory or foreign government not already in the software will not be considered until the following year.
5. Income tax returns will not be considered.

## Submittal Document

If a form meets the above criteria, please complete a Forms Submittal document and submit to TriTech. This document can be obtained by sending a request to [msupport@tritechsoft.com](mailto:msupport@tritechsoft.com). If a submittal document is not completed, the request will not be considered.

## New Forms

To ensure availability during tax season (12/15 to 3/1), please submit forms prior to 12/1. Forms submitted after 12/1 may not be added until after 3/1. In addition, please allow up to 30 days for the addition of new forms to the software after tax season.