Mississippi Insurance Department

MISSISSIPPI BONDSOURCE

User's Manual

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Purpose of MS BondSource Website

On or before October 1, 2016, the Insurance Department shall establish a statewide Electronic Bondsmen Registry for all licenses, powers of appointment and powers of attorney requiring registration under this section. Once established, each professional bail agent, limited surety agent, bail soliciting agent, bail enforcement agent or insurance company writing bail bonds shall be required under Miss. Code Ann. § 83-39-3 (11) to register and maintain a record of each required license, power of appointment and power of attorney in the registry. Failure to comply with this provision will subject the agent to the penalties provided in Section 83-39-29.

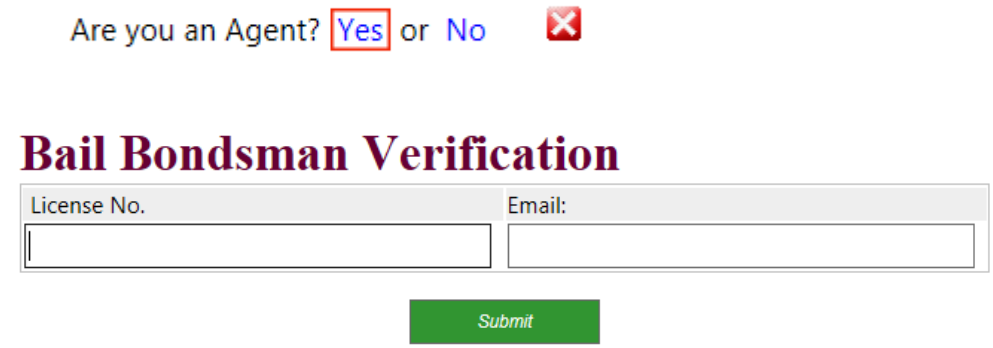
Registration Process

Bail Agents, Law Enforcement and Court Staff can use the **Registration link** on the MS BondSource home page to enroll in the system. Following each of the steps below will ensure a successful registration.

IMG: RP

Bail Agents Verification Process

1. Click on **Registration link**
2. Select **YES**
3. Enter valid **License No, Email ID** and click on the **submit button**

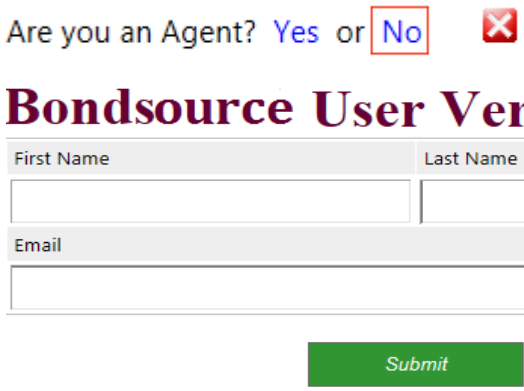


4. After submitting the information on the registration page, you will receive an email to verify and activate your account. **REMEMBER**: *You must click on the activation link in your email before you will be allowed to use your login*.

5. Enter the password and confirm password and click on the submit button to activate your account
6. Once your account is activated, you can login and begin using MSBondSource.

Bondsource User Verification Process

1. Click on **Registration link**
2. Select **NO**
3. Enter your **First Name, Last Name, Email ID** and then Click on the Submit button



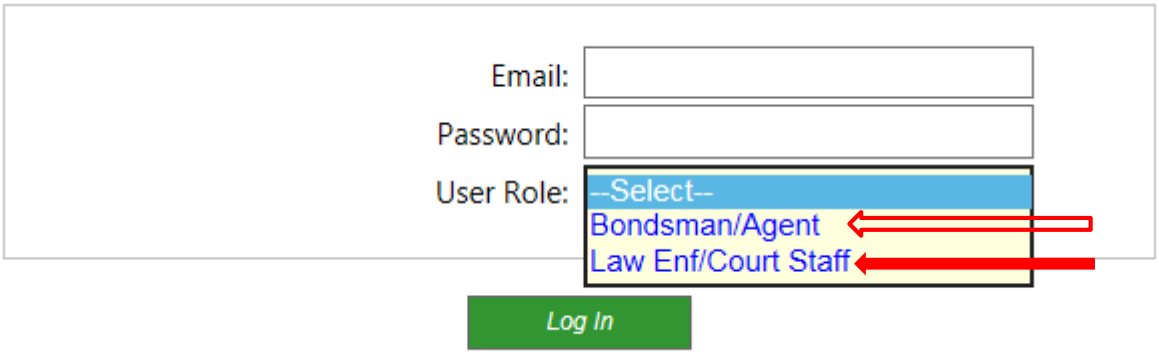
4. After submitting the information on the registration page, you will receive an email to verify and activate your account. **REMEMBER**: *You must click on the activation link in your email before you will be allowed to use your login*.

5. Enter the password and confirm password and click on the submit button to activate your account
6. Once your account is activated, you can login and begin using MSBondSource.

Login Process

Enter a valid **Email, Password**, choose the appropriate **User Role** and click the **Log in** button.

- Bail Agents – Select Bondsman/Agent role(Red Arrow)
- Bondsource Users – Select Law Enf/Court Staff role(Solid Red Arrow)

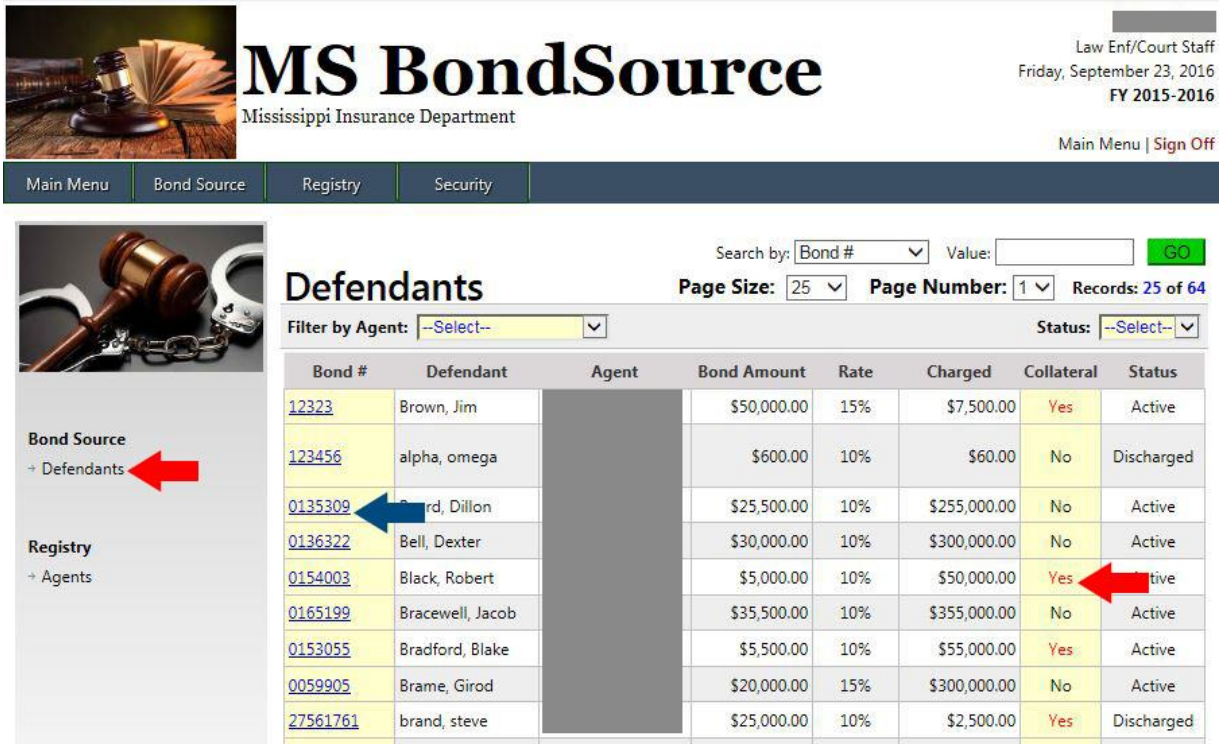


Bondsource User – Defendants Screen (Bond Source tab)

The **Defendants** page provides information about the defendant, the bond, and the agent assigned to it. This information cannot be changed.

- Defendants entered by all registered **Bail Agents** are listed on the **Defendants Screen**.
- Clicking on a specific Bond number will provide additional detail for the **Bond.**
  See image **"IMG: Def-Info"**.
- If collateral was collected, clicking on "Yes" will display a window showing what was collected and its value.
  See image **"IMG: CC"**.

IMG: Def-list



IMG: CC

Bond #: 0154003

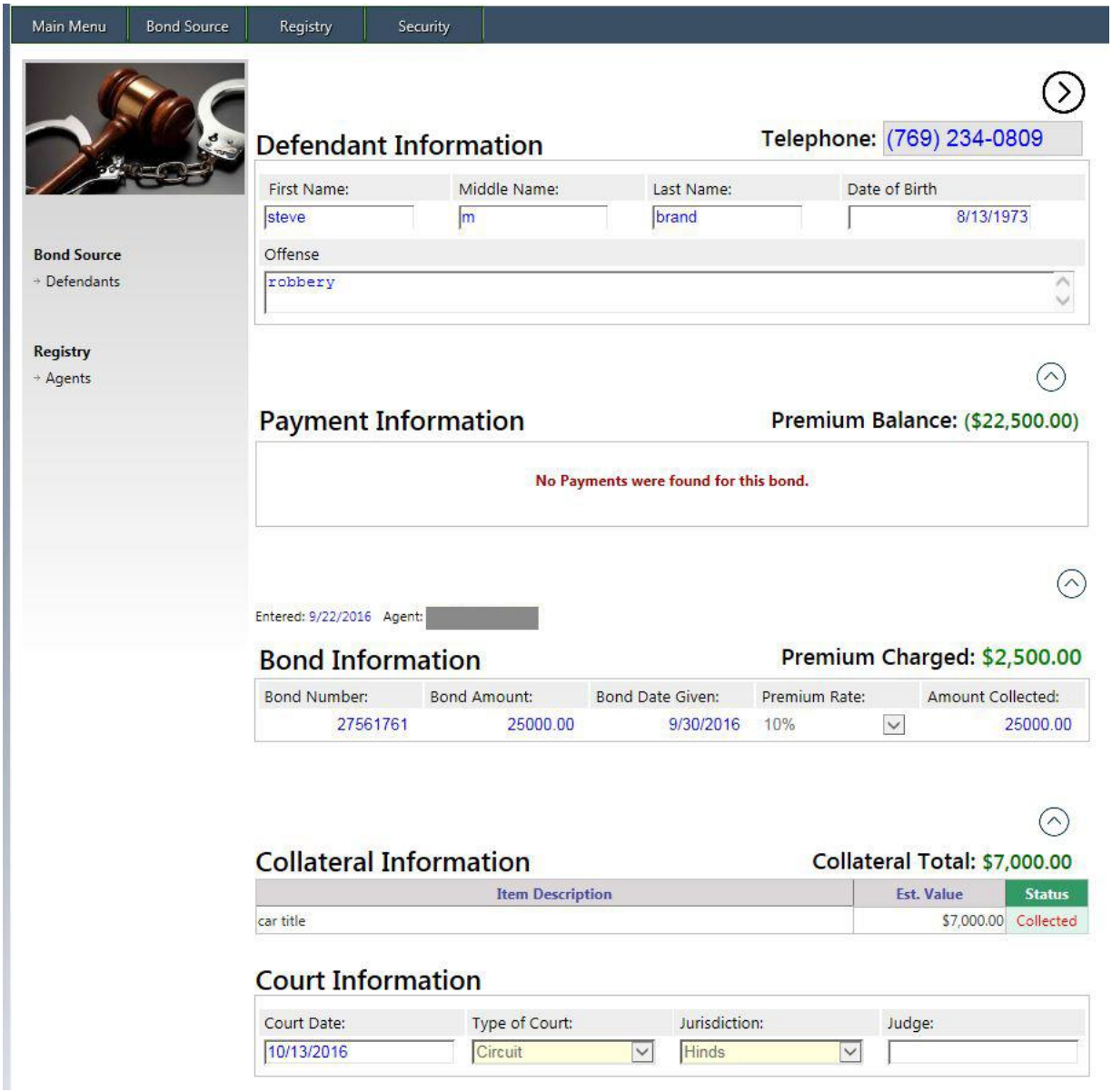
Defendant: **Black, Robert**

Below are the item(s) aquired as collateral for this bond.

Description	Est. Value	Status
1997 Mercury	5000.00	Collected
Boat flat bottom	5500.00	Returned
Honda 4-Wheeler	15000.00	Collected
Bike	5000.00	Collected

Bondsource User - Defendant Information Screen

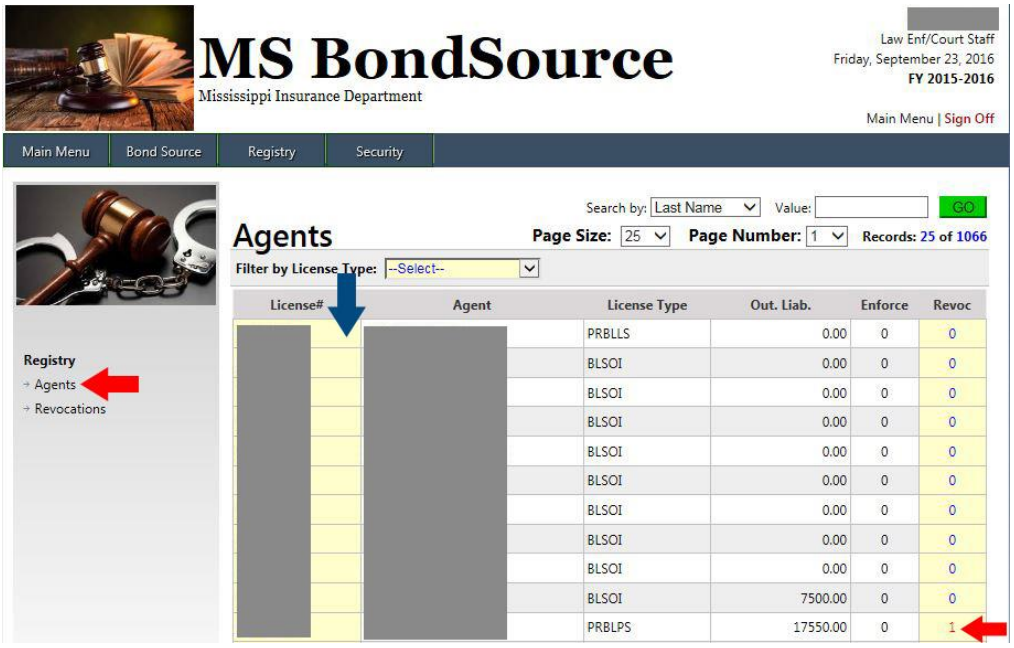
IMG: Def-Info



Bondsource User - Agents Screen (Registry tab)

- All Mississippi **Bail Licensed Agents** are listed on **Agents screen.**
- Clicking on a specific **License #** will provide additional **Agent** detail.
- Any revocations associated with a particular agent will be listed under the **Revoc** field denoting the number of revocations that assigned to the agent within a 1 year period.
  See image **"IMG: Agent-Info"**.
- Clicking on the number under the **Revoc** column, will display a list of revocations associated with the agent
  See image **"IMG: Revoc-Info"**.

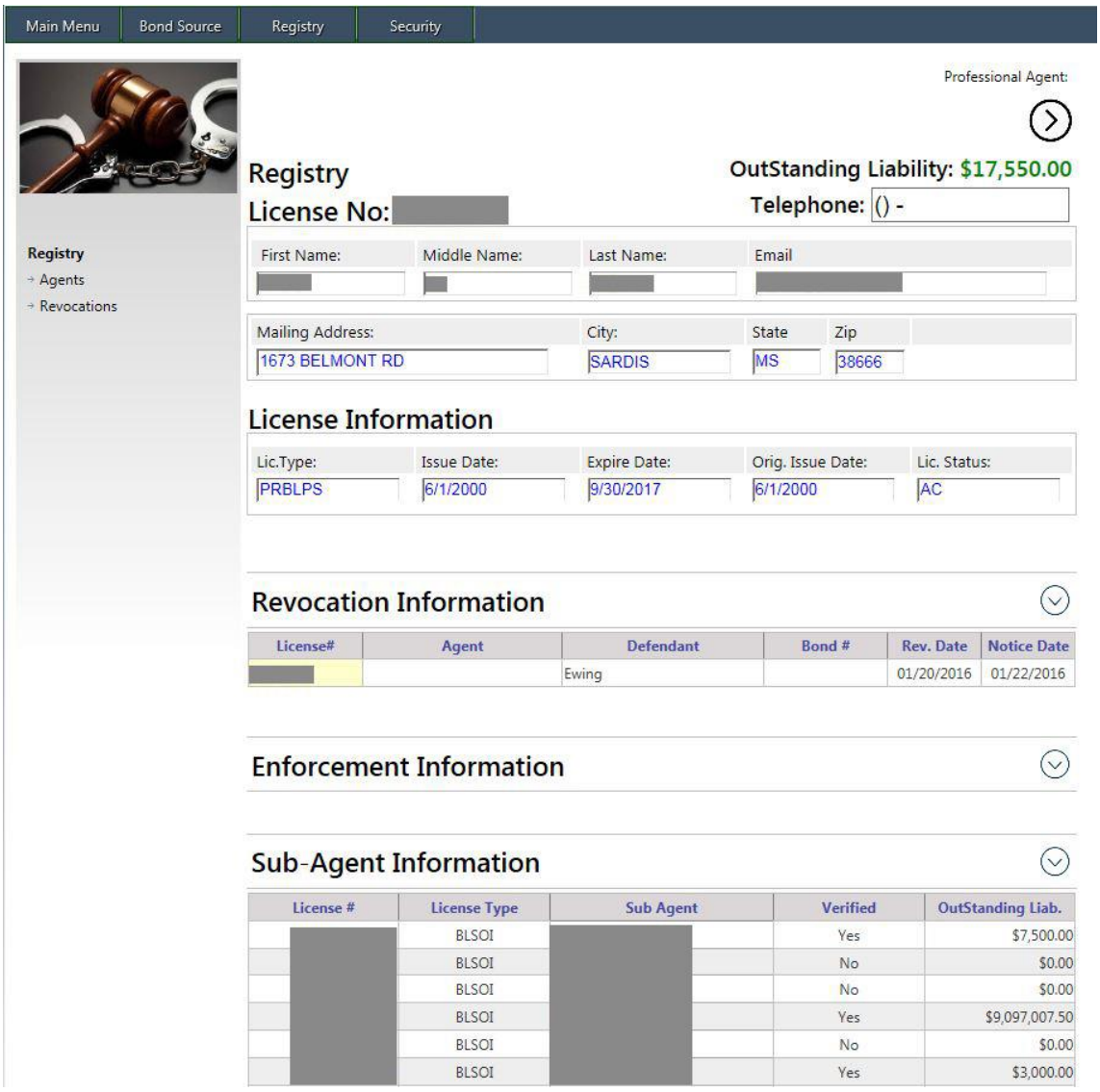
IMG: Agent-List



IMG: Revoc-Info

Bondsource User - Agent Information Screen

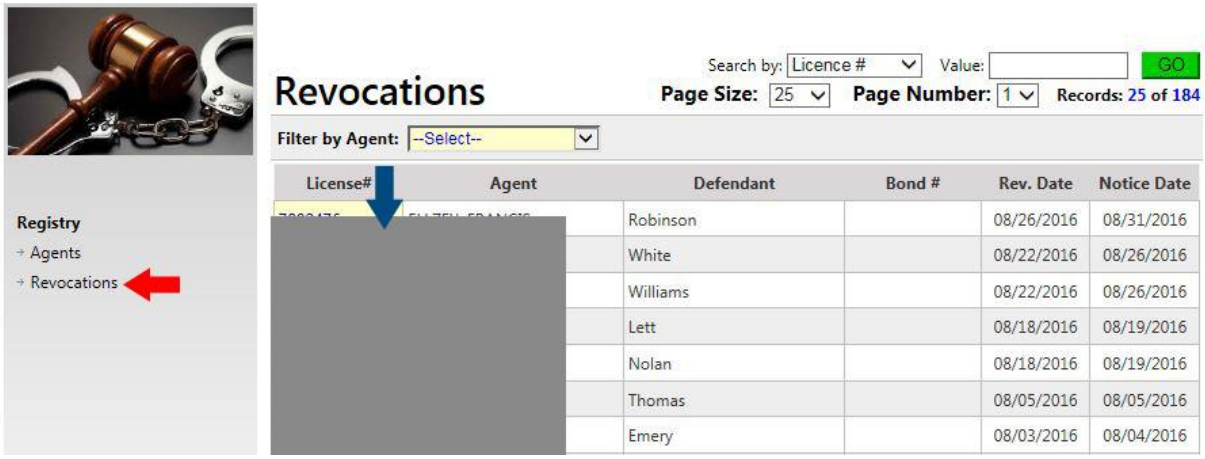
IMG: Agent-Info



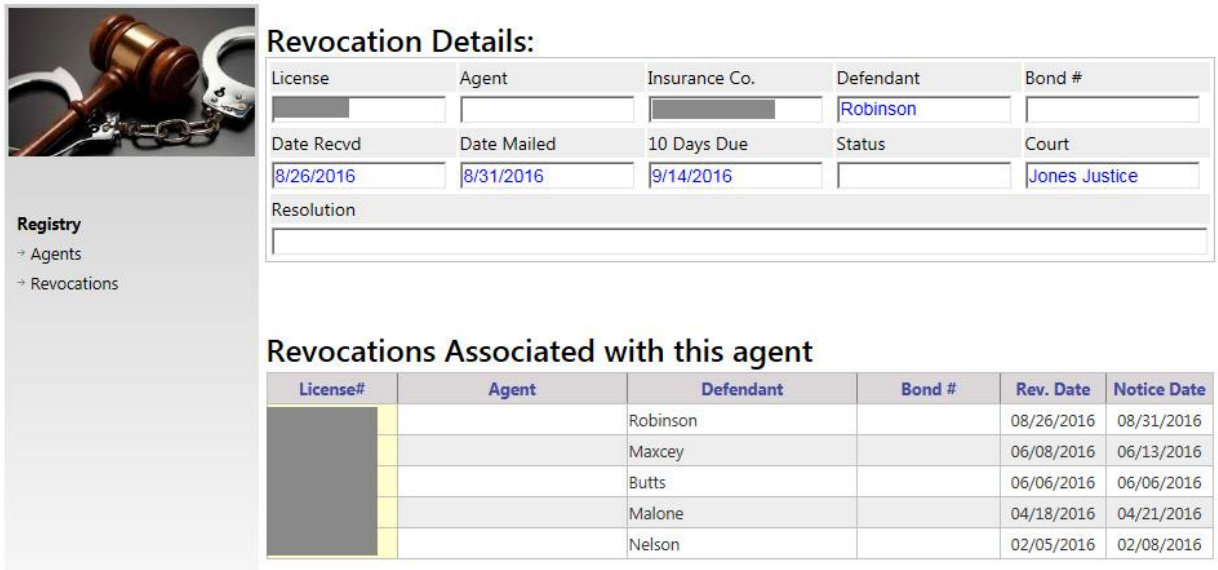
Bondsource User – Revocation Screen (Registry tab)

- The Revocations link under Registry (left menu) will provide users with a list of agents who received revocation orders.
- Clicking on the **License #** will show a list of revocations associated with that agent.

IMG: Revoc-List



IMG: Revoc-Details

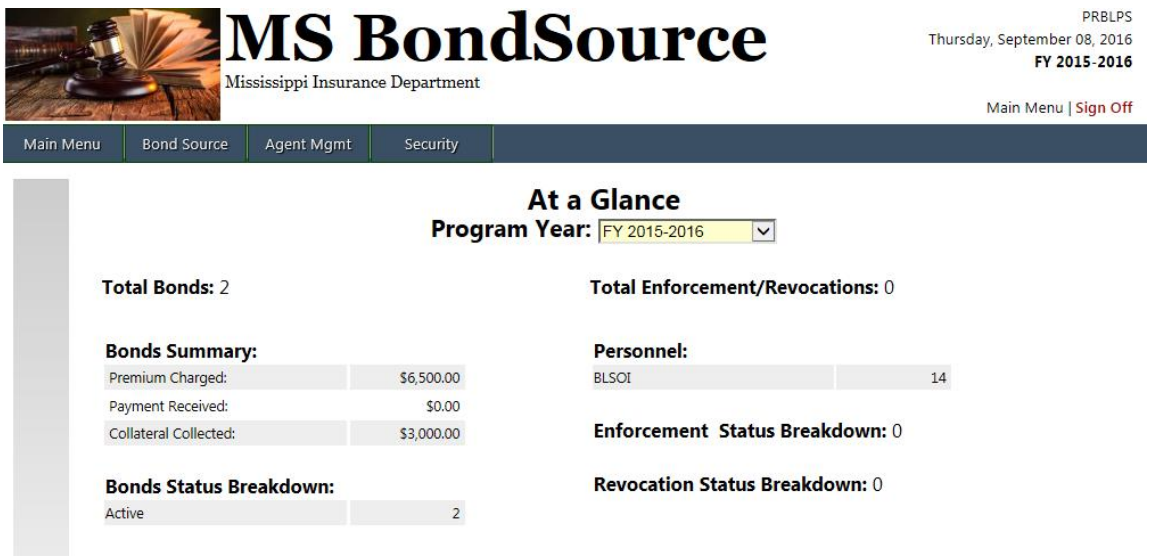


PERS/LIMS Agent - At a Glance Dashboard

PERS/LIMS Agent Dashboard will allow **PERS & LIMS Agents** to enter and manage their defendant information and also any defendant information entered by their Soliciting agents.

Home Screen (Main Menu tab):

- **Program year** – Agent may select a program year to review information (defendant, Bond numbers, Bond amount, etc.) for that year. System will permit only current year information to be modified, previous years information are in view only mode.
- **Total Bonds** – Count of bonds entered in that program year
- **Total Enforcement/Revocation** – Count Enforcement/Revocation entered in that program year
- **Bonds summary** – Total amount of Premium charged, payment received and collateral collected for that program year.
- **Bonds Status Breakdown** – Lists bond status and count of agent who fall under that status
- **Personnel** – Count of Sub agents under that professional agent
- **Enforcement Status Breakdown** - Lists enforcement status and count of agent who fall under that status
- **Revocation Status Breakdown** – Lists revocation status and count of agent who fall under that status



PERS/LIMS Agent - Defendants Screen (Bond Source tab)

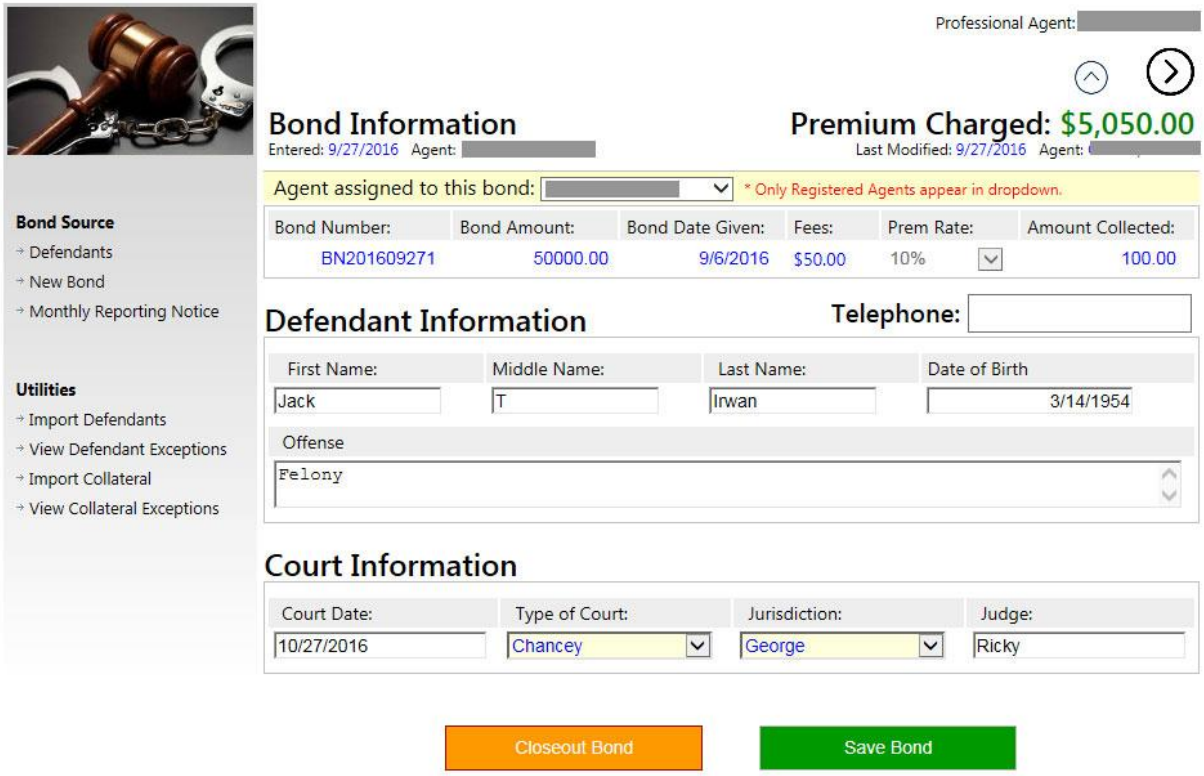
- **Defendants** entered by the **PERS/LIMS Agent** and his or her **Soliciting Agents** are listed on **Defendants screen**.
- Clicking on a specific **Bond #** will display detailed information for the **Bond**.
  See image **"IMG: Def-Info"**.
- If collateral was collected, clicking on "**Yes**" will display a window showing what was collected and its value.
  See image **"IMG: CC"**.

IMG: Def-list

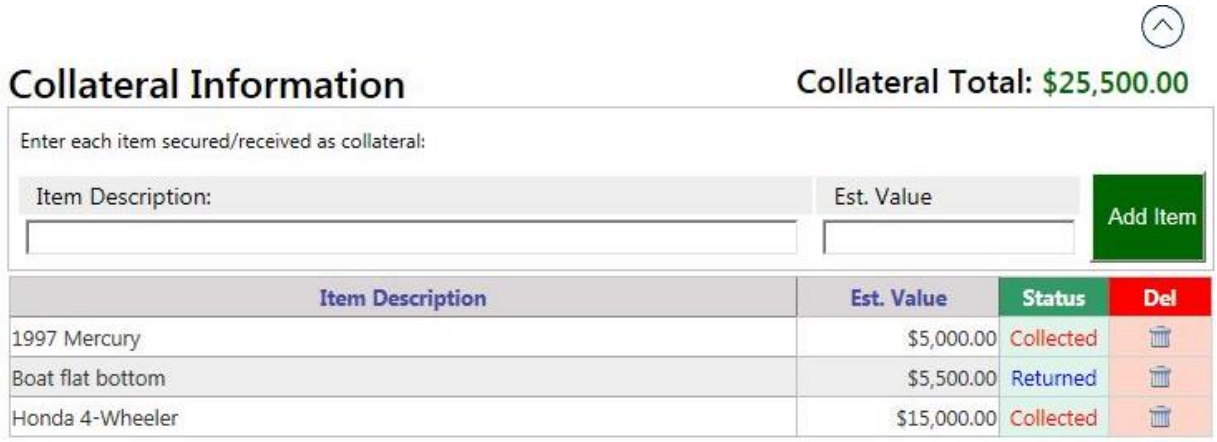
IMG: CC

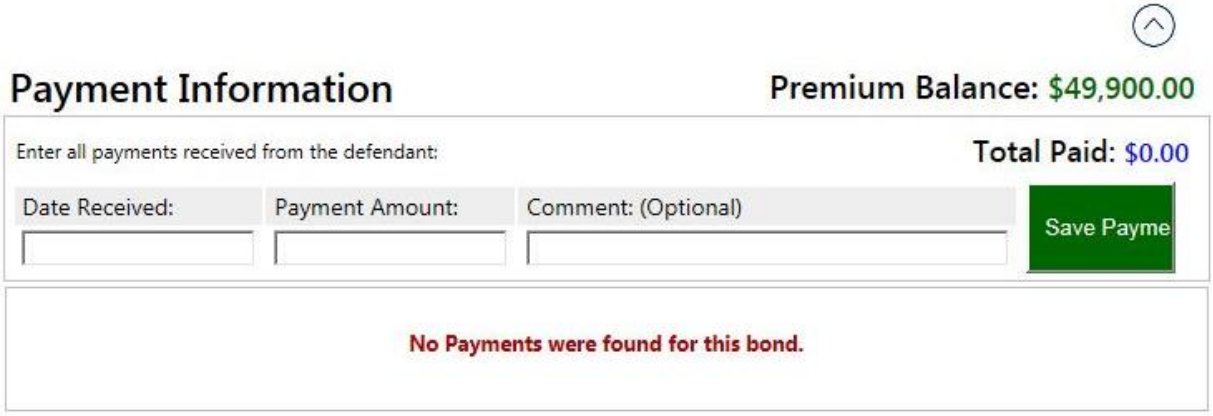
PERS/LIMS Agent – Defendant Information Screen

IMG:Def-Info



Changing Collateral Status – Clicking on Status Collected will change the status to returned and vice versa

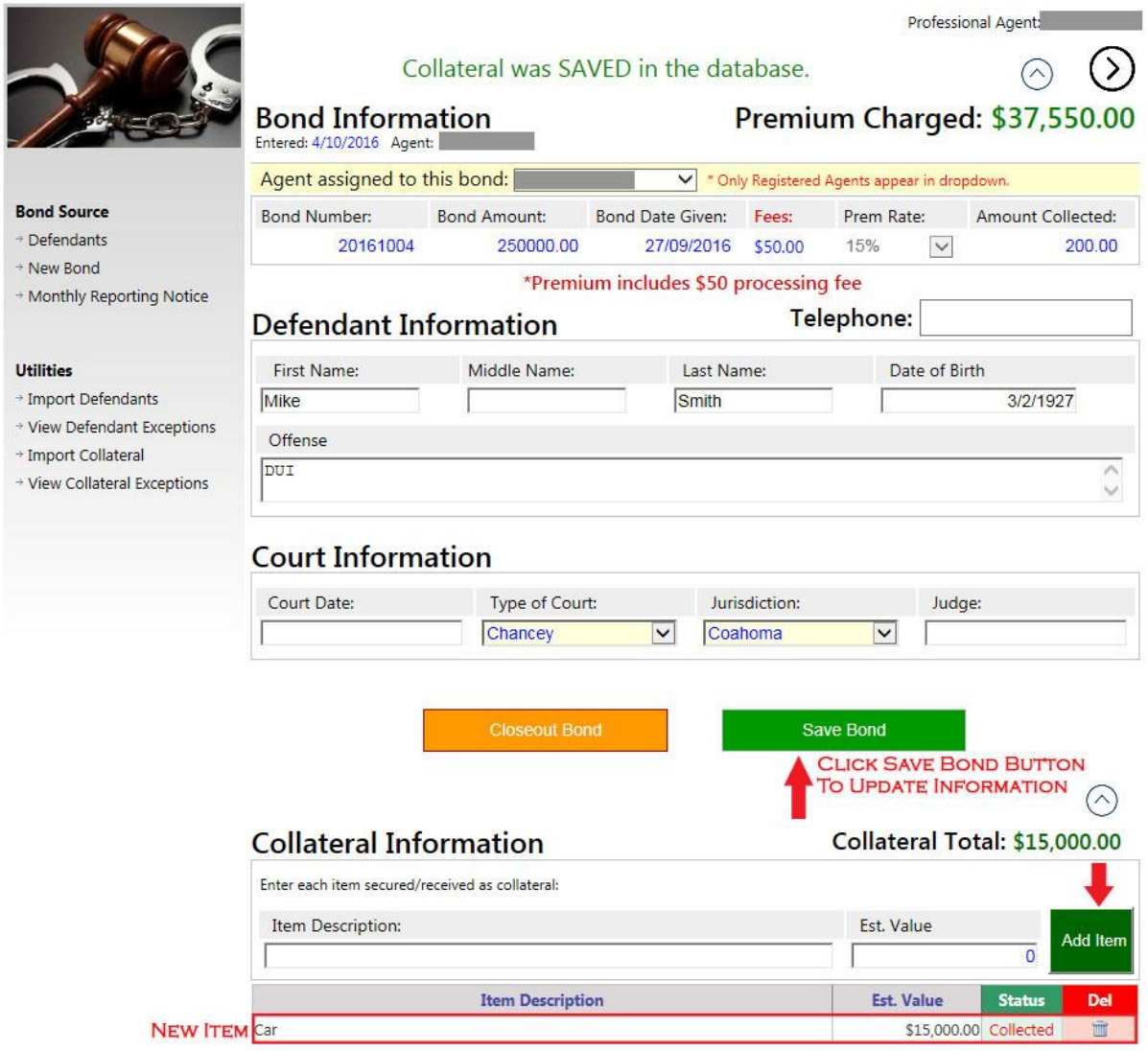




PERS/LIMS Agent - Update Defendants Information

Only **Professionals** and his **Sub Agents** who entered the **Defendant Information** in the system can **UPDATE** defendants' information

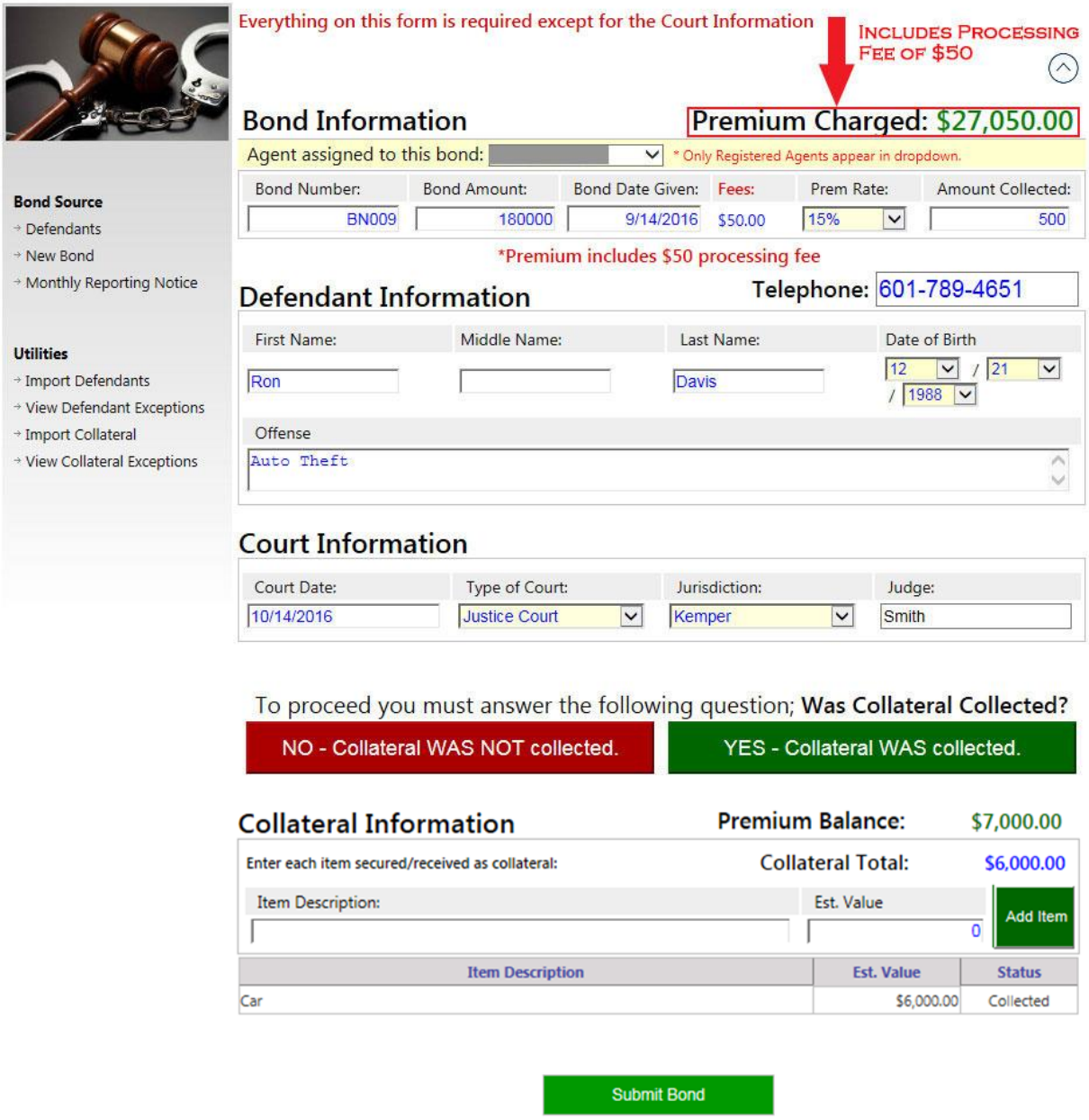
- System does not permit Agents to update **Bond information**.
- **Add item** - on the Collateral section will allow Professional Agents to add any additional collateral collected from the defendant.



PERS/LIMS Agent –New Bond (Bond Source tab)

This screen will allow a **Professional Agent** to **ADD** a new defendant's information.

- **YES – Collateral was collected button** - will allow a professional agent to add a Collateral.
- **Add item** - on the Collateral section will allow Professional Agents to add any additional collateral collected from the defendant.

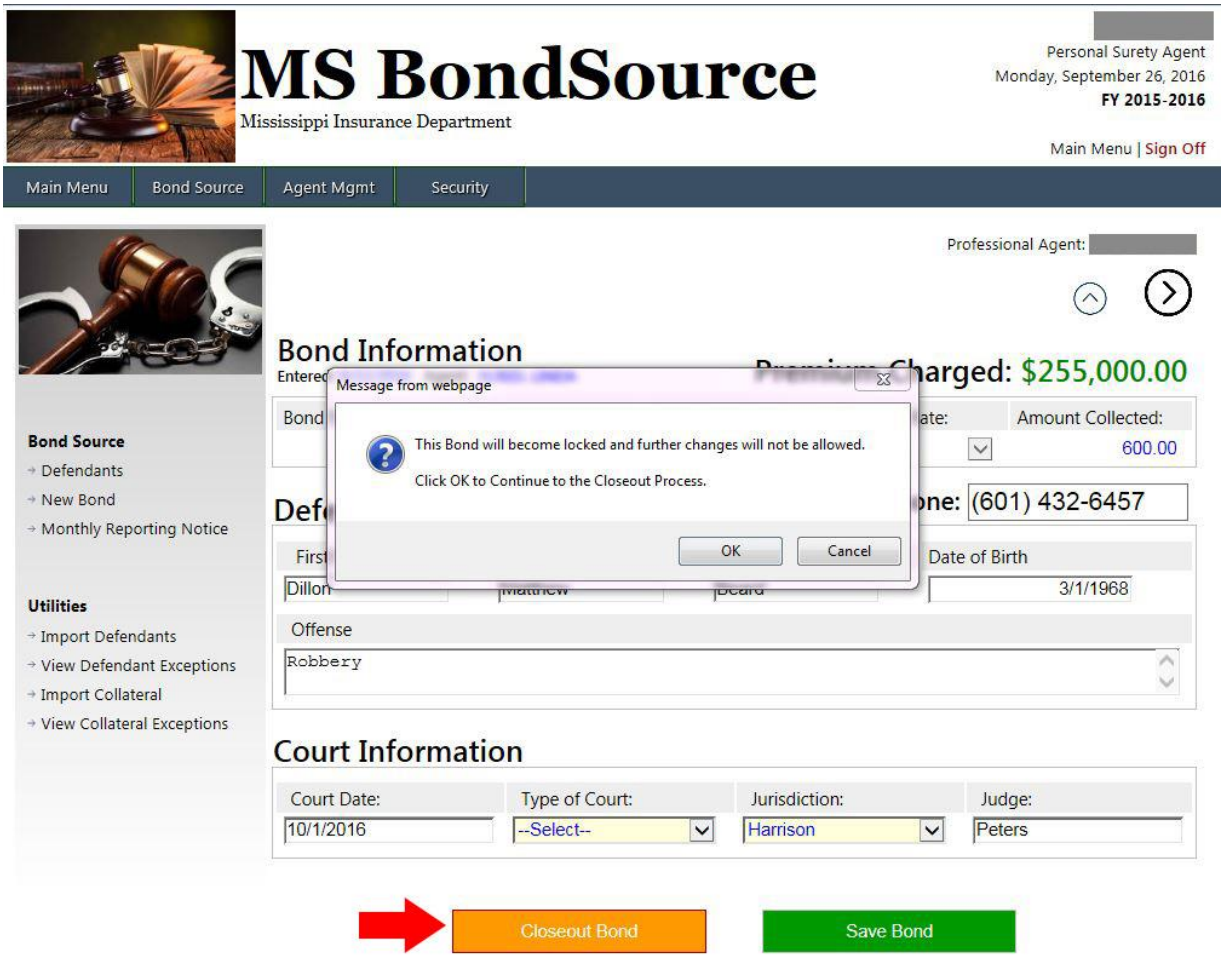


PERS/LIMS Agent – Closeout Bond

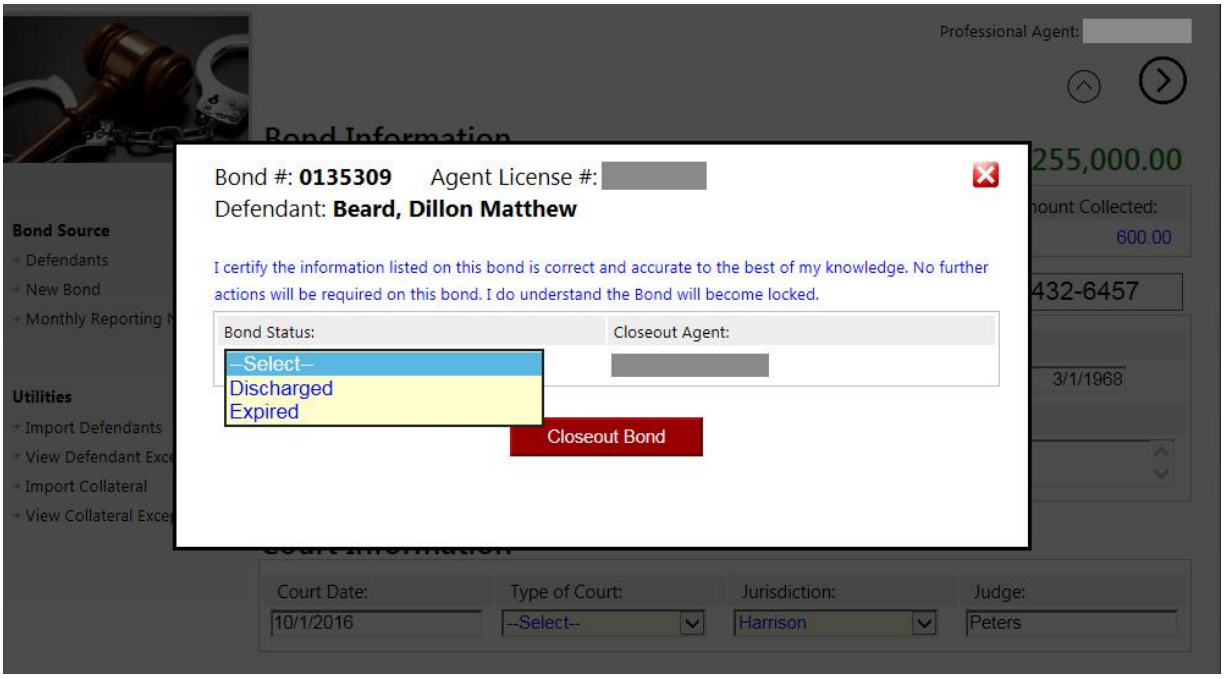
On the Defendant information screen clicking on the **Closeout Bond Button** will allow an agent to close a bond

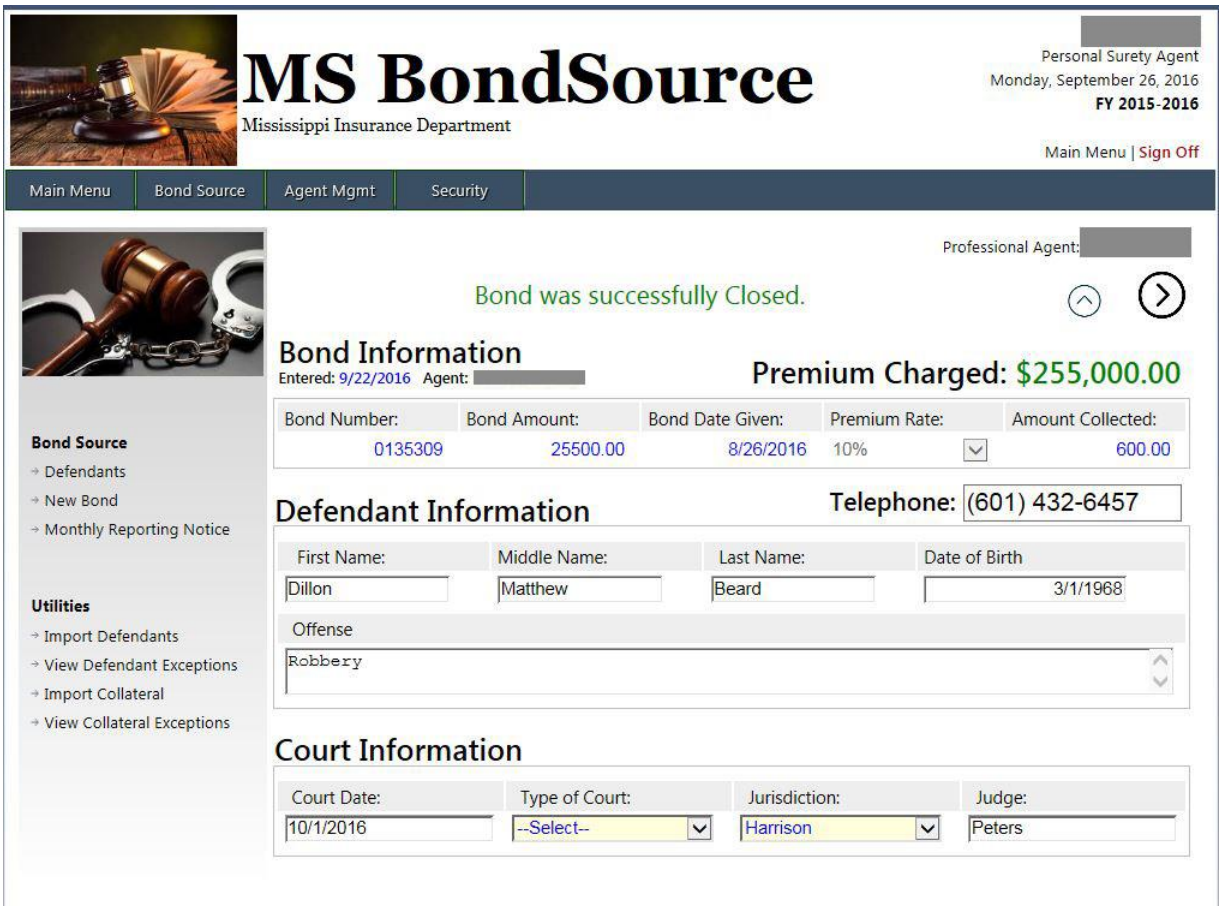
- Click on the **Closeout Bond Button** and then click OK to Continue to the Closeout Process, a popup window will appear with an option to choose **Bond status** (discharged, expired)
- Choose a **Bond status** and then click on the **Closeout Bond Button** on the popup window.

Closed bond cannot be modified any further



MISSISSIPPI BONDSOURCE





PERS/LIMS Agent - Monthly Reporting Screen (Bond Source tab)

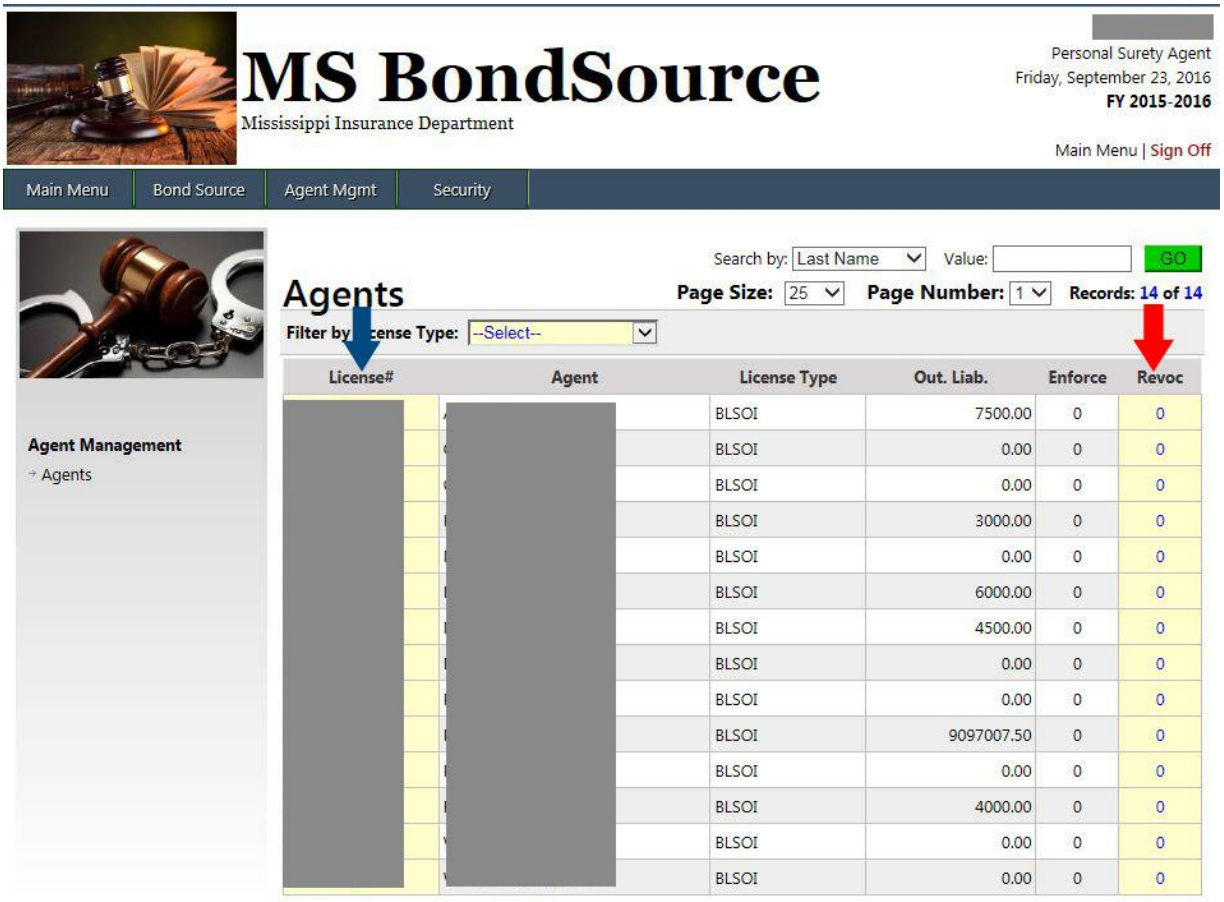
This screen allows all **Professional Agents** make their monthly report.

- **ALL Professional Agents** have to report if they **HAVE** or **HAVE NOT** written a bond for that month.

PERS/LIMS Agent - Agent Management (Agent Mgmt tab)

Agent Management will allow you to manage all of your **Soliciting Agents** bond information.

- Clicking on a specific **License #** will display detail for a particular **Agent**.
- Clicking on a Revocation for a specific agent will display all revocations for that agent.
- A **PERS/LIMS Agent** can review and modify all **Bond Information** within their organization.



PERS/LIMS Agent - Utilities Import Defendants

Import Defendants Screen will allow Agents to upload defendant's information in CSV format. Columns should be separated using the pipe **" | "** symbol.

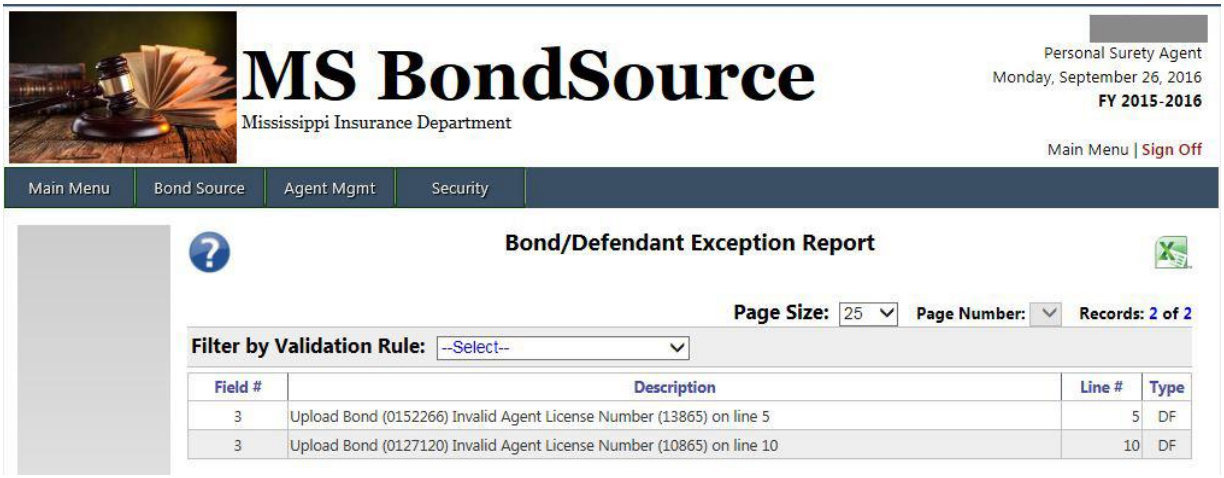
*Bonds that are already in the MSBondSource will be ignored in the uploaded file.

Formatting

Field	Field Description	Data Type	Format
Program Year	Bond Year	Numeric	YYYY
PERS-Lic-No	Professional/Limited Agent License Number	Numeric	25 numbers max
Agent-Lic-No	Soliciting Agent License Number	Numeric	25 numbers max
Bond-No	Bond Number	Alphanumeric	25 numbers/characters max
Bond-Amt	Bond Amount	Numeric	20 numbers max (Includes decimals)
Bond-Date	Bond Date	Date	YYYY/MM/DD
Prem-Rate	Bond Premium Rate	Numeric	Integer 2 Max (**10** or **15**)
Amt-Collected	Bond Amount Collected	Numeric	20 numbers max (Includes decimals)
FirstName	Defendant First Name	Text	15 characters max
MiddleName	Defendant Middle Name	Text	15 characters max
LastName	Defendant Last Name	Text	15 characters max
DOB	Defendant Date of Birth	Date	YYYY/MM/DD
Phone	Defendant Phone Number	Numeric	10 numbers max (**omit dash**)
Offense	Offense	Text	254 characters max
CourtDate	Court Date	Date	YYYY/MM/DD
Court	Type of Court	Text	10 characters max
County	County (Jurisdiction)	Numeric	2 (County ID)
Cjudge	Court Judge Name	Text	35 characters max

PERS/LIMS Agent - Utilities View Defendant Exceptions

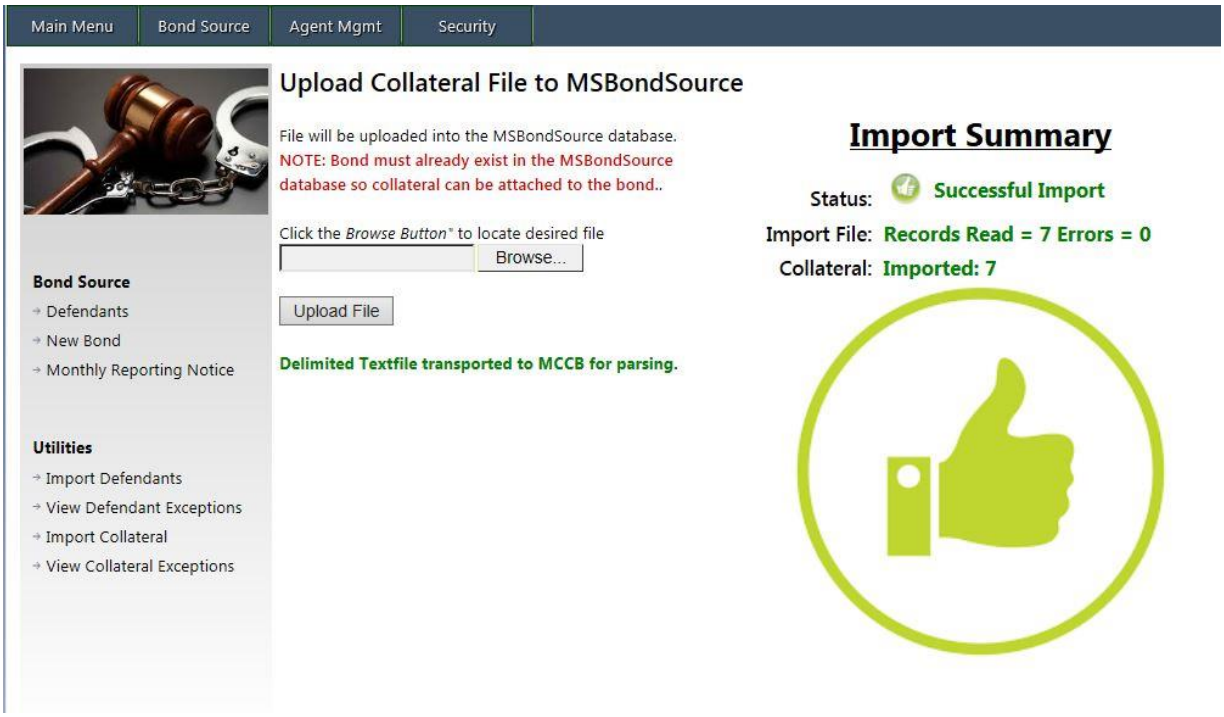
Bond/Defendant Exception Report – If a field (Bond Year, Bond number, Defendant First Name, etc.) is over the max number of characters or if the field data are not placed in proper order, it **DOES NOT** upload and is placed in the exception report. It gives the line number of the error to correct. See the "**Formatting**" table for all fields and their max characters.



PERS/LIMS Agent - Utilities Import Collateral

Import Collateral Screen will allow Agents to upload collateral information in CSV format. Columns should be separated using the pipe " | " symbol.

*Bond must already exist in the MsBondSource database so collateral can be attached to the bond.



Formatting-2

Field	Field Description	Data Type	Format
Program Year	Bond Year	Numeric	YYYY
Bond-No	Bond Number	Alphanumeric	25 max numbers
Agent-Lic-No	Agent License Number	Numeric	25 max numbers
Coll-Value	Collateral Value	Numeric	20 max numbers (Including decimals)
Coll- Desc	Collateral Description	Text	254 max characters
Coll-Status	Collateral Status	Text	15 max characters (only use the words **Collected** or **Returned**)

PERS/LIMS Agent - Utilities View Collateral Exceptions

Collateral Exception Report – If a field (Bond Year, Bond number, Collateral status, etc.) is over the max number of characters or if the field data are not placed in proper order, it **DOES NOT** upload and is placed in the exception report. It gives the line number of the error to correct. See the "**Formatting-2**" table for all fields and their max characters.

MS BondSource

Mississippi Insurance Department

Personal Surety Agent
Monday, September 26, 2016
FY 2015-2016

Main Menu | Sign Off

Main Menu | Bond Source | Agent Mgmt | Security

Collateral Exception Report

Page Size: 25 **Page Number:** **Records:** 7 of 7

Filter by Validation Rule: --Select--

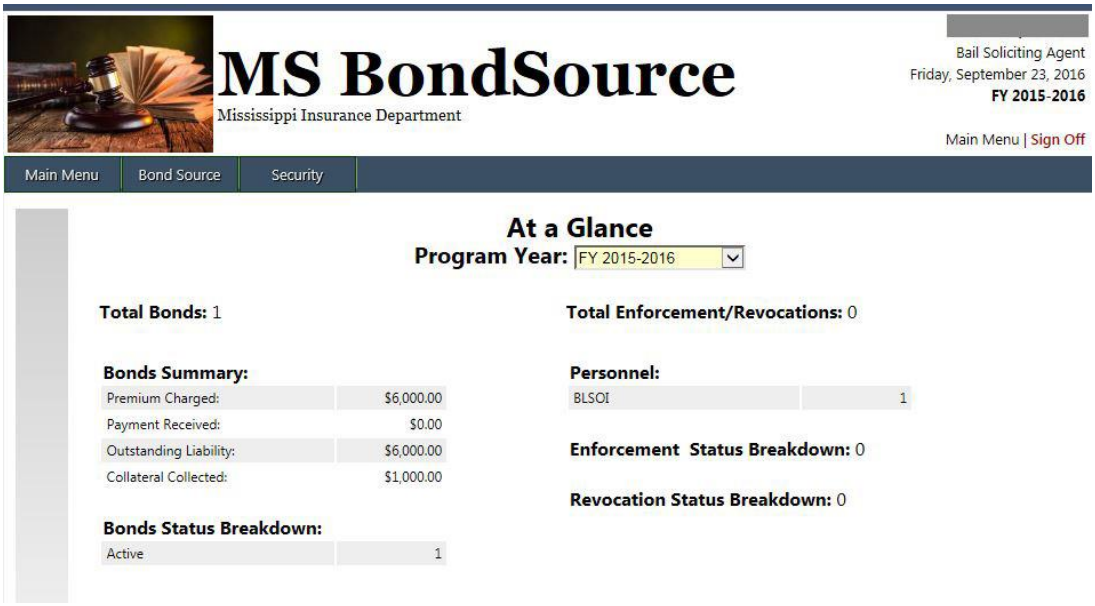
Field #	Description	Line #	Type
6	Upload Bond (0154003) Missing or Invalid Status (Collected,,,,) on line 1	1	CF
6	Upload Bond (0154003) Missing or Invalid Status (Returned,,,,) on line 2	2	CF
6	Upload Bond (0153055) Missing or Invalid Status (Collected,,,,) on line 3	3	CF
6	Upload Bond (0154003) Missing or Invalid Status (Collected,,,,) on line 4	4	CF
6	Upload Bond (0153055) Missing or Invalid Status (Returned,) on line 5	5	CF
6	Upload Bond (9003274) Missing or Invalid Status (Collected,,,,) on line 6	6	CF
6	Upload Bond (9003274) Missing or Invalid Status (Collected,,,,) on line 7	7	CF

Soliciting Agent - At a Glance Dashboard

The **Soliciting Agent Dashboard** will allow a **Soliciting Agent** to enter and manage bond information which they have entered. The agent cannot view or modify any other agents' bond information.

Home Screen (Main Menu):

- **Program year** – Agent may select a program year to review information (defendant, Bond numbers, Bond amount, etc.) for that year. System will permit only current year information to be modified, previous years information are in view only mode.
- **Total Bonds** – Count of bonds entered in that program year
- Total Enforcement/Revocation – Count Enforcement/Revocation entered in that program year
- **Bonds summary** – Total amount of Premium charged, payment received and collateral collected for that year.
- **Bonds Status Breakdown** – Lists bond status and count of agent who fall under that status
- **Enforcement Status Breakdown** - Lists enforcement status and count of agent who fall under that status
- **Revocation Status Breakdown** – Lists revocation status and count of agent who fall under that status



Soliciting Agent - Defendants Screen (Bond Source tab)

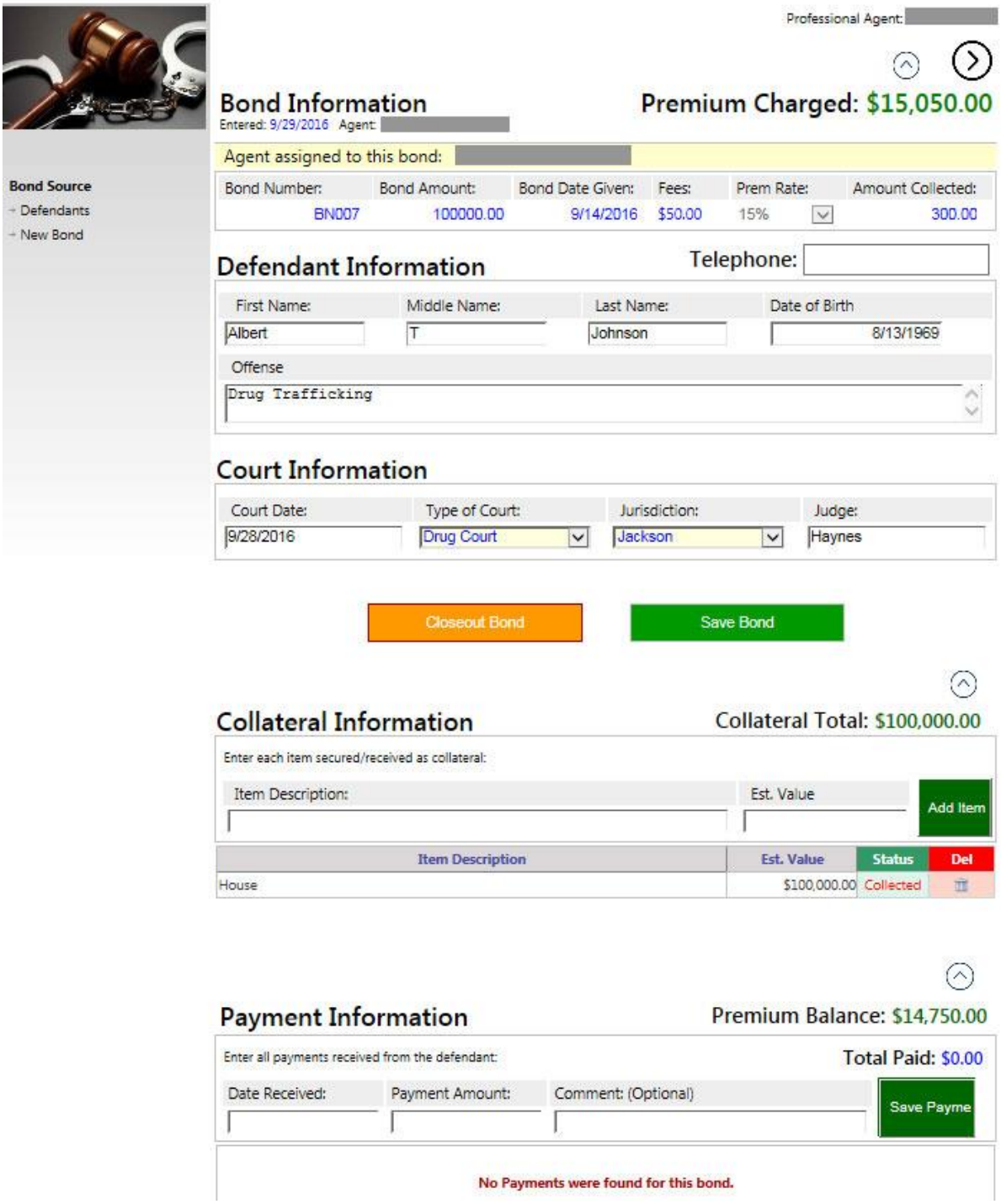
- Defendants entered by a **Soliciting Agents** are listed on **Defendants Screen**.
- Clicking on a specific **Bond #** will display detailed information for the **Bond**.
  See image **"IMG: Def-Info"**.
- If collateral was collected, clicking on "**Yes**" will display a window showing what was collected and its value.
  See image **"IMG: CC"**.

IMG: Def-List

IMG:CC

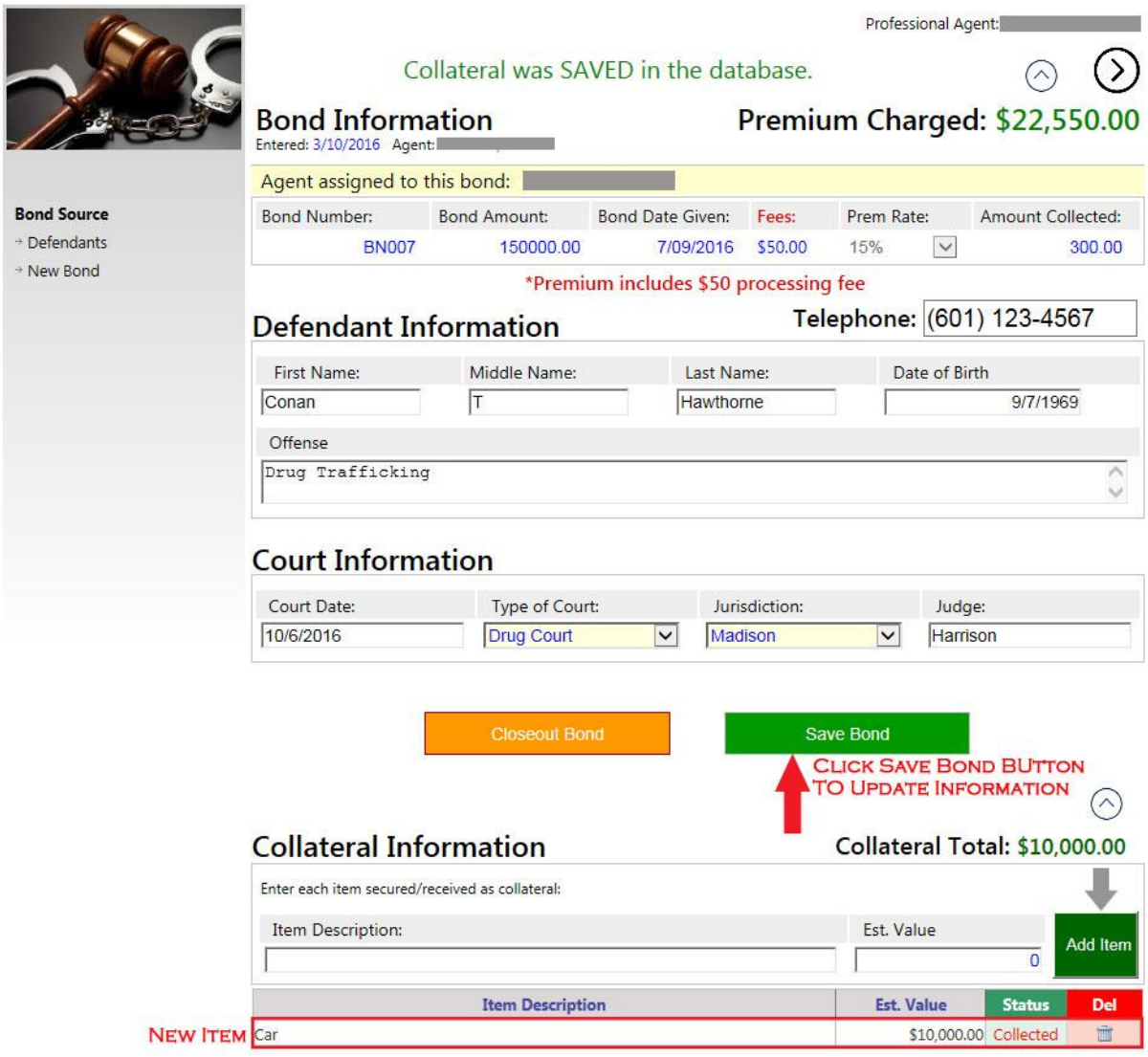
Soliciting Agent View- Defendant Information Screen

IMG: Def-Info



Soliciting Agent - Update Defendant Information

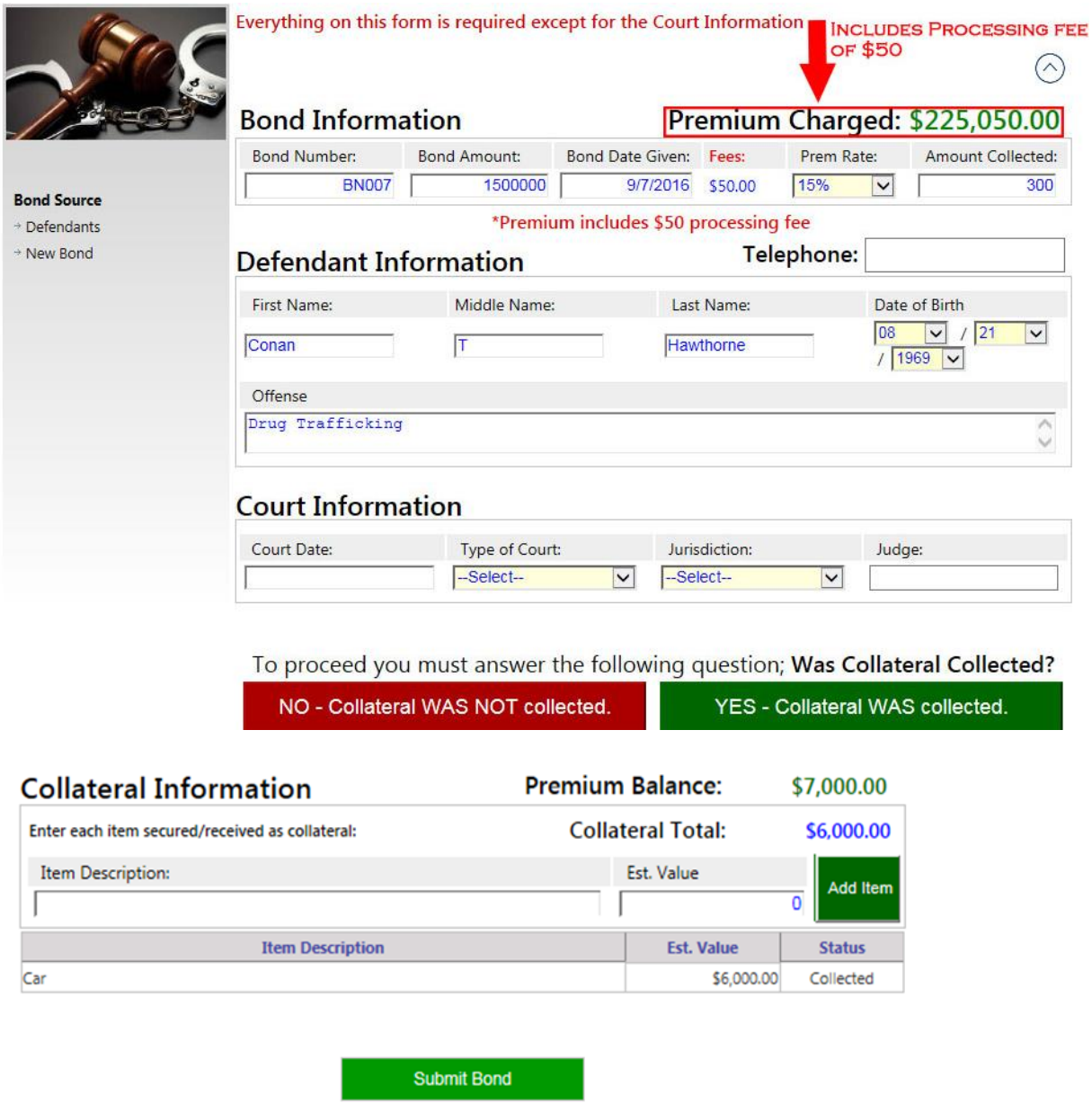
Only the **Soliciting Agent** who entered the **bond**, and his professional agent can update defendant information



Soliciting Agent – New Bond (Bond Source tab)

This screen will allow a **Soliciting Agent** to add a new bond.

- Selecting the **YES – Collateral WAS collected** button will allow the Agent to add any items accepted as collateral.
- The **Add item** button on the Collateral Information screen, will allow Agents to add any additional collateral collected from the defendant.

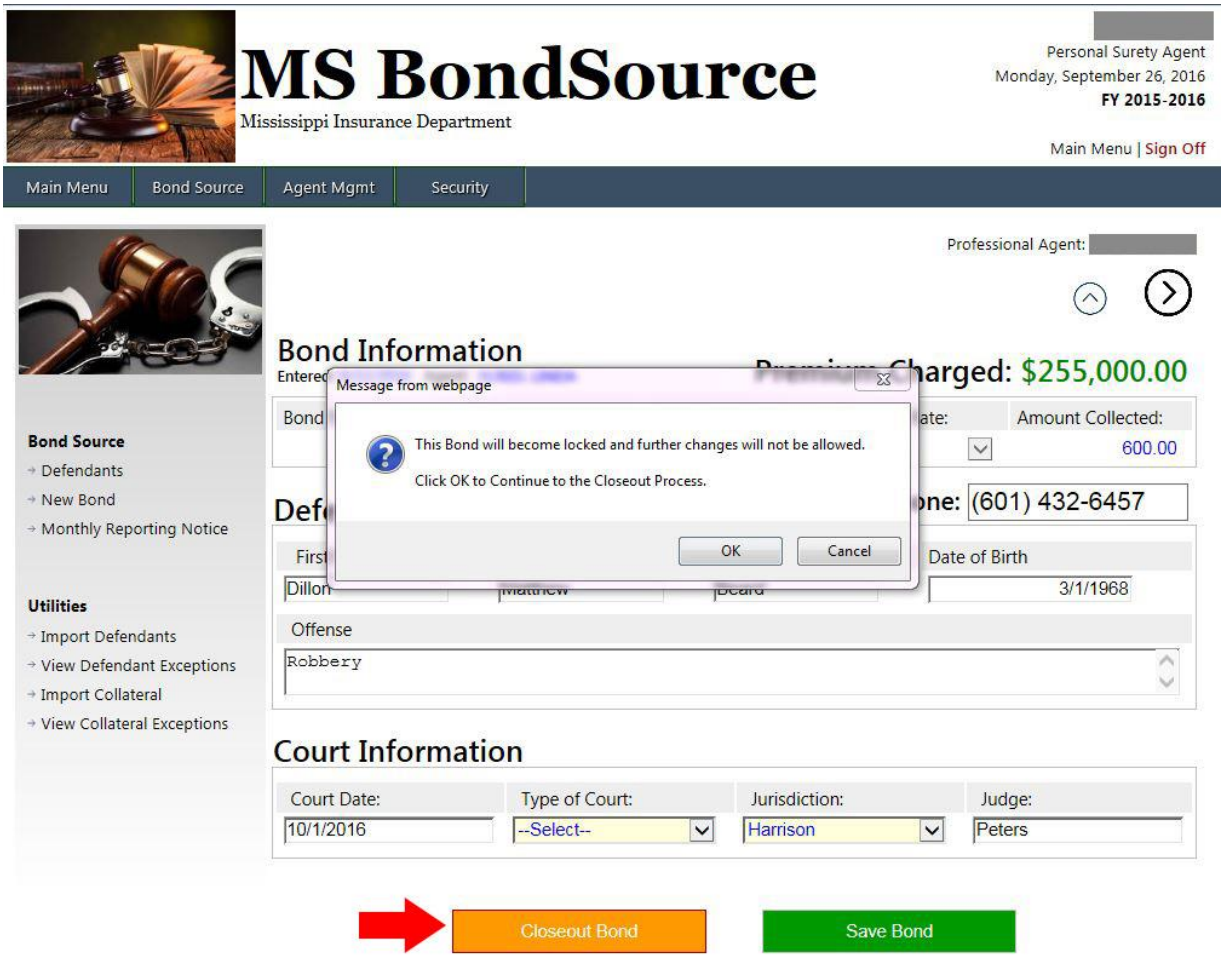


Soliciting Agent – Closeout Bond

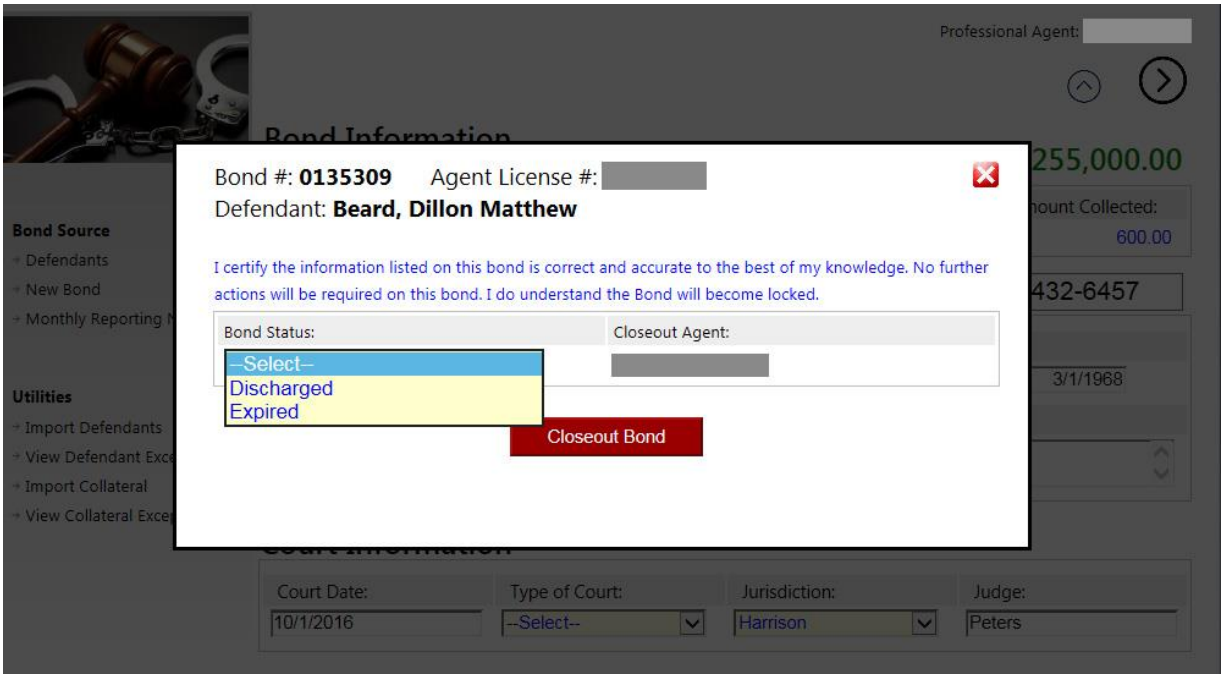
On the Defendant information screen clicking on the **Closeout Bond Button** will allow an agent to close a bond

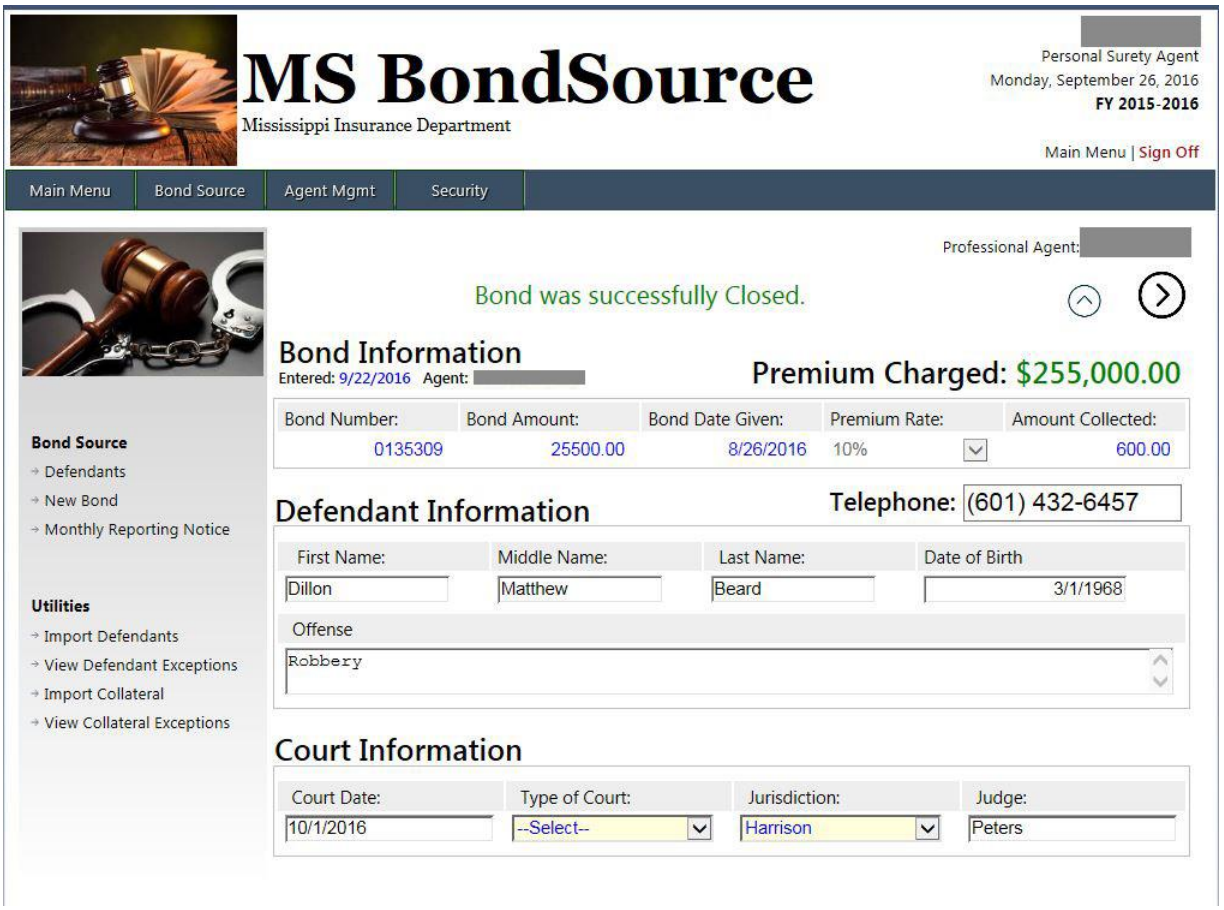
- Click on the **Closeout Bond Button** and then click OK to Continue to the Closeout Process, a popup window will appear with an option to choose **Bond status** (discharged, expired)
- Choose a **Bond status** and then click on the **Closeout Bond Button** on the popup window.

Closed bond cannot be modified any further



MISSISSIPPI BONDSOURCE





Security - Change Password Screen

The **Security Screen** will allow users to change their password.

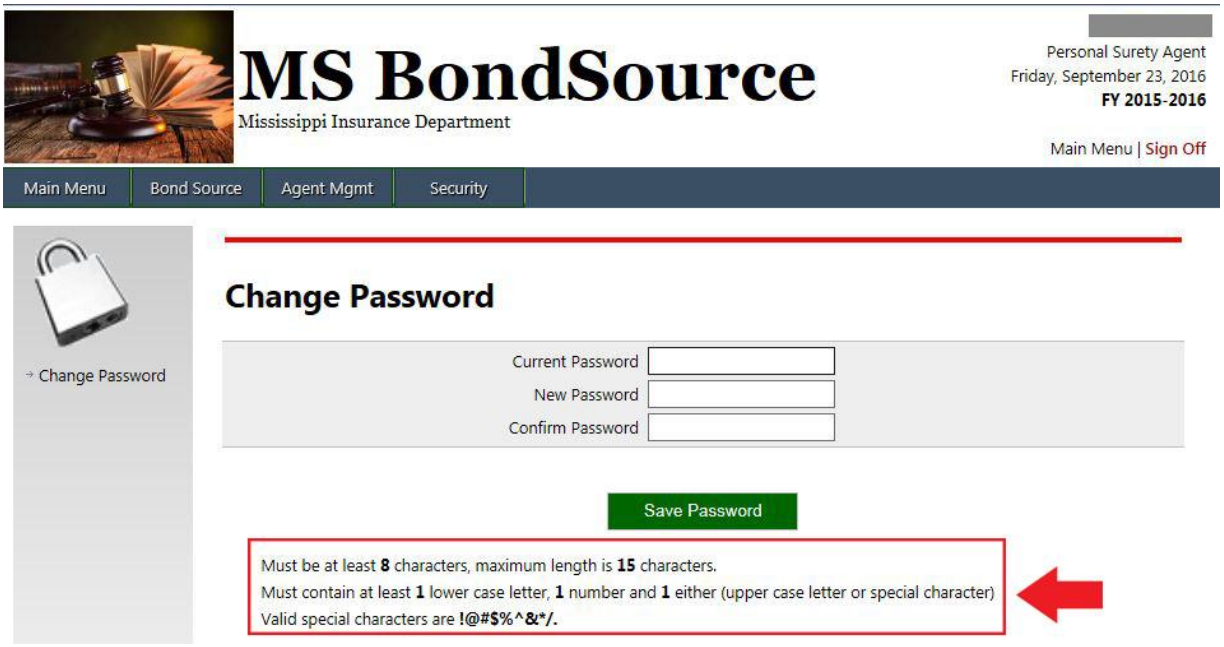
To change:

- Enter previous Password, new password, confirm password and click on the save button to change password.

Password must satisfy below requirement:

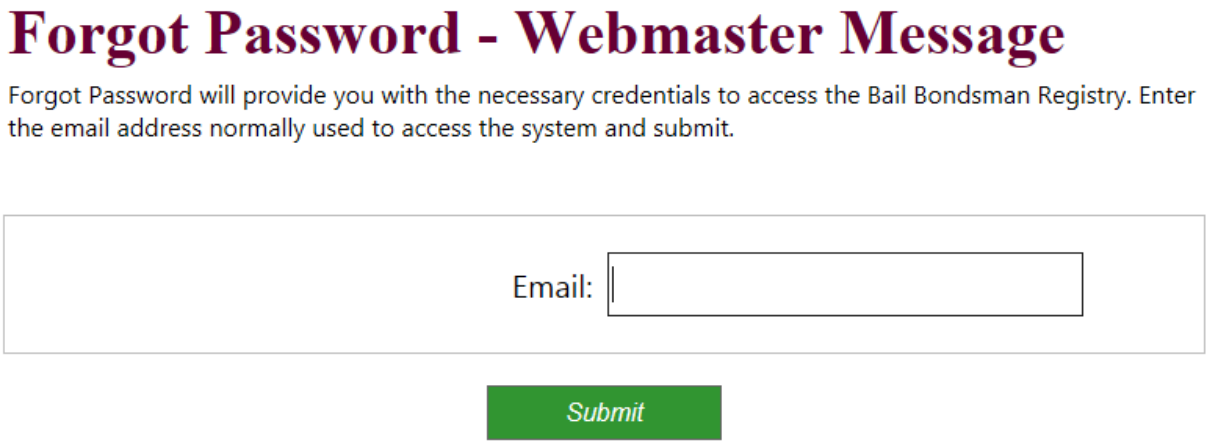
Must be at least **8** characters, maximum length is **15** characters.
Must contain at least **1** lower case letter, **1** number and **1** either (upper case letter or special character)
Valid special characters are **!@#$%^&*/.**

IMG: SCP



Forgotten Password

Forgot Username/Password link at the bottom of the Login Screen will allow registered users to reset a forgotten password.



Forgot Password - Webmaster Message

Forgot Password will provide you with the necessary credentials to access the Bail Bondsman Registry. Enter the email address normally used to access the system and submit.

Credentials were located and should arrive in your inbox in just a few minutes.

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Password	Confirm Password

Submit

References

MSBondsource Website Link: www.MSBondsource.com

Contact Information

If you have any questions, please email bondsource@mid.ms.gov.