

# OPTins Newsletter

# The Scoop

## We're Back – Meet the Support Staff!

*Welcome back, Scoop readers! Meet the teams behind the scenes.*

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### The Service Desk

Many of you long-time OPTins are familiar with the OPTins Help Desk; you've probably spoken to a member or two if you've ever had any questions about using OPTins. You may also be familiar with the NAIC Help Desk, as they assist all customers in multiple departments and support all of the NAIC applications.

Great news: The OPTins Help Desk has combined with the NAIC Help Desk to form the ultimate resource—the NAIC Service Desk. The Service Desk is a great point of contact for any SERFF questions you may have, and they are available Monday–Friday from 8 a.m.–5 p.m. CST.

**Service Desk Phone:** 816.783.8500

**Service Desk Email:** [optinshelp@naic.org](mailto:optinshelp@naic.org).

#### Contact Us!

Is there something you'd like to read in the next issue of The Scoop? The OPTins Marketing Team is available Monday–Friday from 8 a.m.–5 p.m. CST.

**Phone:** 816.783.8787

**Email:** [optinsmktg@naic.org](mailto:optinsmktg@naic.org)

#### JIRA Service Desk Update

A great addition to the Service Desk has been the addition of JIRA—a ticket management tool. If you're working with the Service Desk, be sure to include the ticket number on all communication!

### OPTins Marketing Team

The changes on the Online Premium Tax for Insurance (OPTins) Marketing Team include a couple familiar faces and a few new product specialists. We've also added an intern! If you've recently started using OPTins, you've worked with us on getting your company implemented.

We're here to help you set up and answer any questions we can along the way.



## User Admin

*We take it seriously!*

A quick reminder to all of our OPTins filers: OPTins contains a lot of sensitive information pertaining to entities and payments. For security purposes, OPTins users should all maintain their own unique logins.

If you'd like a username of your own, the User Admin for your account can send a request via OPTins. These requests are sent directly to and processed by the Service Desk with 24–48 hours.

We perform monthly audits and will deactivate shared accounts, so please be sure to maintain your own individual login!

If you have any questions about getting your own OPTins login, please contact the NAIC Service Desk.

The Service Desk can be reached at 816.783.8500 or [service@naic.org](mailto:service@naic.org).



## OPTins Filing Fees vs. State Fees

What's the difference?

Transaction fees and state fees are two unrelated fees. State fees are the fees requested by and paid directly to the state and may not always be required! These state fees are paid via Automated Clearing House (ACH) Debit or ACH Credit, depending on how your OPTins account has been set up. To reconcile OPTins filings with your bank statement, please go to Filings > EFT Report, and select the appropriate date range. The EFT Report will break down the amounts submitted, which state(s) the fees went to and the dates of the filings submitted.

Transaction fees are the fees associated with using OPTins, required by the NAIC.

The fees are broken down into three categories: Surplus Lines, Premium Tax and State Specific.

- Surplus Lines: 5% of the tax due, never to exceed \$10; \$1 for zero filings.
- Premium Tax: \$10 flat fee for all filings.
- State Specific: \$10 flat fee for all filings.

You won't be charged for amending your filings, so if you make a mistake, fix it instead of trying to refile! Contact our Service Desk if you need help at 816.783.8500 or [optinshelp@naic.org](mailto:optinshelp@naic.org).

If you have any additional questions regarding transaction fees or state fees, please contact the OPTins Marketing Team at

## NAIC Insurance Summit

Your go-to conference for insurance industry training and news.

Held for the first time in April 2016, The NAIC/National Insurance Producer Registry (NIPR) Insurance Summit is a week-long conference for insurance professionals and serves to discuss prevalent issues, NAIC key initiatives and regulatory information.

Attendees are able to select a specific track or stay the full week! Some of the topics for the upcoming Insurance Summit include Innovative Technology, Market Regulation and Producer Licensing.

The 2017 Insurance Summit was held May 22–26, 2017 at Crown Center in Kansas City, MO.



You can find more information about the Insurance Summit here: [www.naic.org/insurance\\_summit/](http://www.naic.org/insurance_summit/)

**Mark your calendars for next year!**

June 18–22, 2018  
Kansas City, MO

## 2017

### Upcoming Filing Deadlines & Key Dates

**March 24–27, 2018**

*Spring National Meeting*  
**Location:** Milwaukee, WI

**June 18–22, 2018**

*NAIC/NIPR Insurance Summit*  
**Location:** Kansas City, MO

