

THE SCOOP ON OPTins v2

Have you noticed something new with OPTins? The second phase, v2, was recently released and has expanded to incorporate not only immediate, secure transmission of premium tax filings and payments, but also surplus lines, assessments, and Annual Contracted Producer (ACP) Report filings and payments (to participating states).

With the v2 release, the NAIC has partnered with



TriTech – a leader in premium tax software since 1995. This union offers the PREMIUM Pro software customers the capability of submitting their premium tax forms and payments electronically via OPTins. This integration will also allow states to receive filings data on submissions from TriTech customers, beginning with 2009 quarterly filings.

If you are currently a TriTech customer, contact their office for filing instructions.

Filers can now allocate their payments by specific categories and states can adjust the allocations as needed.

Other great enhancements include expanded functionality for states to audit and review filings, such as the ability to link directly to their State Page and Schedule T, and email their filing comments directly to the filer.

If you have any questions, take a look at the updated user manual or, feel free to contact the OPTins Help Desk at optinshelp@naic.org or 816-783-8990.

WHO CAN USE OPTins?

At this time, North Dakota, Arizona, Alaska, and Delaware will accept OPTins filings. West Virginia will accept OPTins beginning with their 1st quarter 2009 submission, due in April. Rhode Island has mandated OPTins for submission of their 2008 ACP Report filings.

Keep in mind, that if your company has separate departments or areas that handle premium tax (or other taxes and assessments) and ACP filings, each department can use OPTins. If your company uses the same bank account, you can simply grant access to the other department so that they, too, can submit their filings via OPTins. If they use a different bank account, please contact the OPTins Marketing Team at 816-783-8787 to discuss implementation.

To add new users, send an email to the OPTins Help Desk. The email should include the new user's name and email address. We will add the new user and email their login information to them directly.

The OPTins Help Desk is available 8am - 5pm Central Time, Monday through Friday. Reach the Help Desk at 816-783-8990 or via email, optinshelp@naic.org.

TIPS AND TRICKS

• UPDATE YOUR BOOKMARK

If you've bookmarked the OPTins URL, update your bookmark to the new location: <https://eapps.naic.org/optins-static/>

The release notes are posted on the splash page, as well as information about OPTins support.

• BALANCE YOUR TRANSACTIONS

Balance your OPTins transactions to your bank statement with an EFT report. The EFT report can be viewed as a Web Page or CSV File, which can be converted to an Excel document.

Simply click on the 'EFT Report' link on the main OPTins Workspace, enter the date range, and click 'Submit'.

