

STATE SCOOP

You've taken the first step and registered to use OPTins, but are you using it for all products and in all states that accept OPTins?

Here is an overview of the states using OPTins, as well as the filings they will accept via OPTins:

	Alabama	Alaska	Arizona	Delaware	North Dakota	Rhode Island	Montana	West Virginia
Premium Taxes	X	X	X	X	X		X	X
Surplus Lines	X			X	X			X
Assessments			X					X
ACP Reports						X		

OPTins LOVE!

"OPTins really minimizes the confusion that can happen when you have so many different payment and filing options. The way that OPTins is set up makes it really simple and quick to file a tax return."

- Donna Bundy, Tax Clerk, Cincinnati Insurance Companies

"I used the OPTins system to electronically submit the Rhode Island Annual Contracted Producer Report. The step-by-step instructions were very clear and concise. Even uploading my Excel file was quick and error free."

It was also a visually appealing program as each item was listed, Step 1, Step 2, etc. Once I complete my transaction, I successfully searched for my filing, the

results being very easy to read. All in all, the entire process took no more than 5-7 minutes to complete. Thank you for creating such an easy to use program."

- Leslee Young, Operations Analyst, United Healthcare Insurance Company



DID YOU KNOW?

Alabama and Montana have joined the OPTins movement and will accept premium tax filings as of their second-quarter due date!

OPTins Word Search

M P U S F L V O O H V E C U A V Y R I S
 O P X W X S F N A O S G V I D R K F Y U
 J N O T Q Q U A R T E R L Y T E M P T R
 S Z J I O X R A E D Y Z W S D R T A C P
 K L F J T B M P W S R R U Y B P X A L L
 O D I B W A O A G X E D R P N E V D T U
 X G A N N U A L L Y N X Z R K B F U C S
 O C S Q E S D F S I T J J E A R O O D T
 V S X C F S T N E M Y A P M C W G Q Q
 L M K A D X T Y K E R K Z I O X D N R Y
 S S T R O P E R U R O O L U J H J E V Z
 V E N I L N O W Z J D V F M U R O V X U

ANNUALLY
 FORMS
 INDUSTRY
 LINES
 ONLINE
 PAYMENTS
 PREMIUM
 QUARTERLY
 REPORTS
 STATE
 SURPLUS
 TAX

TIPS AND TRICKS

As indicated in the above graph, not all states currently accept each filing type.

In order to avoid mistakes, confirm you've selected the correct state filing type from the "State" drop down menu as well as the correct "Company Type."

You can only submit to a state once per "Filing Year" and "Filing Period."

Once the filing has been created, carefully review the State Instructions and confirm you are submitting the correct form to the correct state account. For example: Delaware has two separate state accounts: DE - Premium Tax and DE - Surplus Lines.

For more "Tips and Tricks," review the OPTins user manual.

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.

