

OPTins "Scoop"

Issue 6
3-10

Quarterly Insight for State and Industry



OPTins 3.1

We have a secret. Are you ready? We love OPTins 3.1 and we think you will too.

Using OPTins speeds up the filing process and virtually eliminates any incorrect filings. What else do we love about OPTins? It saves paper, which helps to protect the environment. Recently released OPTins 3.1 includes

even more time-saving functionality as well as some aesthetic changes.

Industry users can now submit filings for additional filing periods from within the original filing, saving time, steps, and "clicks." In addition, industry users can now submit amended forms to the state via OPTins versus amending and emailing the form to the state. As always, there is no additional transaction fee involved for amendments.

State users will now be able to search by State of Domicile and the steps to amend filings has changed slightly, offering a more efficient process.

Updated user manuals have been posted on the OPTins splash page reviewing all of the enhancements. If there are any questions about functionality, please contact the OPTins Help Desk at optinshelp@naic.org or 816-783-8990.

New Hampshire Requires OPTins

Effective 5/1/2010, New Hampshire will require that all Surplus Lines filings, including monthly affidavits, be submitted via OPTins.

Look at their website for more information:
<http://www.nh.gov/insurance/companies/surpluslines/index.htm>

Did You Know?

If you submit your filing through TriTech's PREMIUM Pro software, you will need to log into OPTins directly if you're required to pay any additional fees.

search for and locate the filing, scroll to the Payment Information area and click on the 'Submit Additional Fees' button.

Enter the amount due and click 'Submit'. Your fees will automatically be transferred to the state for no additional OPTins transaction fee.

Each user is provided with an individual username and password. Login to OPTins,



IMPORTANT - Action Required!

Update Your Entities....With the recent release of 3.1, the states have now begun gathering additional pieces of key data. It is important that all Entities (companies and individuals) have a State of Domicile, NPN (if applicable), as well as license numbers or State ID numbers (if applicable) for **each OPTins state** in which they do business.

Before you submit your next filing, complete the following:

- Go to the Settings tab;
- Click on 'Entities';
- Click on the Entity (company or individual) to edit the settings;
- Add the State of Domicile from the drop down menu;
- Add each of the states and license numbers or State ID numbers in which the Entity does business;
- Click 'Save'.

Update Your Contact Information..... When your account is initially activated, the OPTins team will enter your name and email address. It is a good idea to check your personal information to make sure your name is spelled correctly and email address is correct. In addition, you should complete your address and contact information. If your contact information is not correct, neither the states nor the OPTins team can contact you.

- Go to your Settings tab;
- Click on 'Edit';
- Update all fields that are not complete or incorrect;
- Click 'Save'.



What Can I File and Where Can I File It?

You've completed your set-up and received your username and password. Are you using OPTins to file in all available states for all available filing types?

File your Premium Taxes in the following states: Alabama, Alaska, Arizona, Delaware, Montana, North Dakota, and West Virginia.

File your Surplus Lines Taxes in these states: Alabama, Arizona, Delaware, North Dakota, and West Virginia. New Hampshire

will require all Surplus Lines filings be submitted via OPTins as of May 1, 2010.

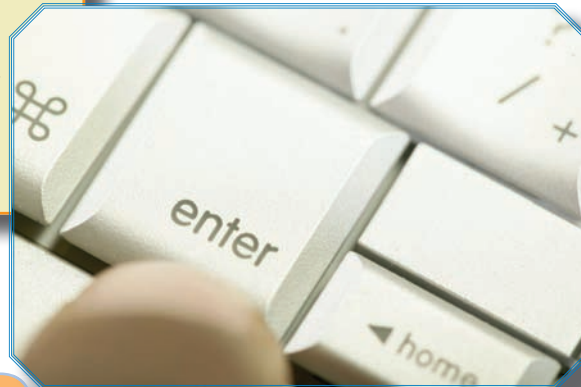
Finally, a few states accept certain state-specific tax filings via OPTins: Arizona, Rhode Island, and West Virginia. Choose from those state-specific filings in the "State" drop down menu.

Make OPTins your one filing solution to all of your filing options. It's fast, easy, and cost-effective.

Inside Scoop

If it has been over 90 days since you last accessed OPTins, you will need to contact the OPTins Help Desk at optinshelp@naic.org or 816-783-8990 and request a password reset.

Pay close attention to the Year when creating a new filing. OPTins automatically defaults to 2009. If you are filing for 2010, be sure to change the year before you create and submit the filing.



New Manuals Available

Both state and industry user manuals have been updated reflecting the most recent updates with OPTins 3.1.

To access the manuals, go to the OPTins splash page and click on the 'Implementing OPTins' link at the upper left corner of the page.

The State Manual is located under the 'State' header and the Industry Manual is located under the 'Industry' header.

After reviewing the updated manuals, if you have additional questions, you are welcome to contact the OPTins Help Desk at optinshelp@naic.org or 816-783-8990.

Upload - Don't Scan

The OPTins team has worked with the states to build "smart" PDF forms that will minimize errors and allow states to collect important data.

Industry users - time is precious, so save as much as you can! There is no need to print the form and scan it back into OPTins, simply download the form to your computer, complete and save the form, then upload it back into your OPTins filing.

PREMIUM Pro users can simply complete and submit

the forms built into the PREMIUM Pro system.

The only exception to the "upload" requirement are affidavits. These forms do not have required fields, therefore they can be printed, signed, scanned into your system, and then uploaded into OPTins.

If you have any further questions, please contact the OPTins Help Desk at optinshelp@naic.org, or 816-783-8990, or reference the Industry Manual.

Join us at E-Reg!

The NAIC is hosting the 11th Annual E-Reg Conference May 3 - 5, 2010 at the Hyatt Regency Crown Center Hotel.

This year the OPTins team will be hosting a session on Wednesday, May 5th from 10:00 am to 10:45 am. The session will be a review and demonstration of the OPTins system.

If you or a member of your company or state department are planning to attend E-Reg, be sure to stop by and say hello!

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.