

OPTins "Scoop"

Quarterly Insight for State and Industry

Issue 7

June, 2010

You Asked for It! - Schedule Filings

The next OPTins release – 3.2 – is scheduled for July, 2010. With each release brings more system improvements and this release is no exception!

Beginning with OPTins 3.2, users will be able to schedule dates in advance of a tax deadline for filings and accompanying tax payments to be submitted to the state on the chosen date.

We've received this suggestion

from many users and hope that the addition of scheduled filings will lead to an easier overall filing process.



The next release also includes additional interim filing periods to accommodate those states with multiple non-annual filing periods.

For a full review of the OPTins 3.2 release notes, keep an eye on the splash page. In addition, the OPTins User Manuals will be updated to reflect the system improvements.

Did You Know?

Did you know that when entering search criteria such as the Entity Name or the Tracking Number you can use a wildcard to speed up your search process?

with the specified characters entered. You can also use the wildcard at the beginning of the criteria field if you know the last portion of the data you are searching for.



In OPTins, a wildcard is an asterisk (*). Simply type in the first few characters in the criteria field you wish to search for data, and then add the wildcard at the end to find all items that begin

An example is the OPTins Tracking Number. If you know the tracking number ends in 29725, for example, enter "29725" in the Tracking Number field.

COMING SOON - OPTins Website!

The OPTins website will be available soon! Keep an eye out for the email notification. The new website will have an additional link to the application login page, as well as manuals, tutorials, updates on new states and filing types accepted, and past Scoop issues.

What's the website address you ask? www.optins.org.

Puerto Rico Makes 10!

Puerto Rico has become the 10th state to join the "OPTins team"!

They will require that all Premium Tax filings be submitted via OPTins beginning with their next annual submission in March, 2011.



Thank you for your support, Puerto Rico!

OPTins is Awesome - You Said So!



We recently conducted a survey of OPTins users who submitted filings in all available states last year. When asked why they used OPTins to file their tax related filings to all available states, they confirmed what we've believed all along – OPTins is easier and more cost-effective than filing in paper.

When you look at the overall filing process and take into consideration your time, as well as the time spent generating paperwork and payments by the numerous other people involved in the process, the OPTins transaction fee is substantially more cost-effective.

Are you using OPTins to file in all available states and for all

available filing types? If you answered no, we ask that you reconsider.

The electronic filing process stores your forms and payment record in one place. You won't have to search for paper filings or room to store your paper filings.

In addition, with the release of OPTins 3.2 in July, users will be able to schedule filings and payments to be issued at a later date. This means you can log in once, create and schedule all of your filings, and be confident that the system will generate the filing and payment on the date requested. Can you think of an easier way to handle your tax-related filings?

We didn't think so!

Here is an overview of states accepting OPTins and the Filing Types they accept:

Alabama: PT, SL
Alaska: PT
Arizona: PT, SL, SS
Delaware: PT, SL
Montana: PT
New Hampshire: SL
North Dakota: PT, SL
Rhode Island: ACP
West Virginia: PT, SL, SS

LEGEND:

PT – Premium Tax
SL – Surplus Lines
SS – State Specific
ACP – Annual Contracted Producer Report

OPTins "Scoop"

Issue 7 ~ continued

June, 2010

Quarterly Insight for State and Industry

New Producers? Update Your Entities

When your OPTins account is originally created, we ask for your Filing Entity information - companies and/or producers you file on behalf of - so that all of your options are available when you create your filings. Basically, we do the leg work for you!

If, after your account has been activated, you acquire additional companies or producers, you will need to enter their information into OPTins before you can create a filing on their behalf.

To update your Filing Entities, login to OPTins, click on 'Settings', then 'Entities', and

finally click 'Add Entity'. Choose the Entity Type - Company or Individual - and enter all of the applicable data, including the State of Domicile and UNID. It is important that you enter the UNID from another Entity into the new Entity. The UNID is the number that links to your bank account. Be sure to enter the UNID exactly as it was created, with no spaces before or after.

If you have any questions regarding adding an Entity to OPTins, please call the OPTins Help Desk at (816) 783-8990 or send an email to optinshelp@naic.org.

Inside Scoop - Electronic Signatures

Many OPTins jurisdictions accept electronic signatures in lieu of a physical signature or a notary stamp. You simply need Adobe Reader to set up an electronic signature. Once you have that signature created in the signature box, you can use it to electronically sign your tax form.

Adobe has instructions on how to set up an electronic signature in their help section located [here](#). If you use a different PDF producer please see their help section for instructions on how to set up an electronic signature.



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.

OPTins
Online Premium Tax for Insurance
A Product of NAIC

Let Your Voice Be Heard!

Let the states know that you want them to use OPTins! Wouldn't it be easier if every state that could accept your tax-related filing via OPTins used OPTins? Think about it - all of your filings in one location, accessed easily, and stored securely and electronically.

Print this out, cut the note across the dotted line, and send it back with your next tax-related paper filing. We need your support! Let the states know that you want to make OPTins your electronic tax filing solution!

STATES - Make OPTins Your Electronic Tax Filing Solution So That We Can Too!

We use OPTins and would like to submit our tax-related filings to your state via OPTins, too. The implementation process is simple and the review process is a breeze!

Contact Thea Cook, Product Implementation Manager, at 816-783-8747 or tcook@naic.org to get started.

Thank you!

OPTins
Online Premium Tax for Insurance
A Product of NAIC