

OPTins "Scoop"

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Quarterly Insight for States and Industry

Save Those Trees and Use OPTins!

How much are you spending to send your paper filings to the states? How long does it take for your accounts payable department to process a paper check? These are just a couple of the questions that should be considered when comparing the cost benefits of using OPTins over paper.

When using OPTins, companies no longer pay postage fees and the delay between the time the company sends their paper filing and when the state receives and processes the filing is reduced.

When submitting a paper filing and a payment, accounts payable

departments are often responsible for processing the paper check, which can take time. In addition, there are costs associated with ordering paper checks.

Those issues are eliminated when using OPTins. The filer simply enters the amount due and the filing and payment are submitted simultaneously, securely, and electronically to the state.



OPTins has developed a cost benefit model that companies can use to compare their costs when sending paper filings versus the costs of using OPTins. To find out more, go to the [OPTins website](#) and click on the Cost Benefit Model button.

Massachusetts Makes 12!

Massachusetts has shown their support for OPTins and will begin accepting Surplus Lines filings as of January 1, 2011. Since you've already taken the steps to implement OPTins for your company, **there is nothing more that you need to do** – just submit your Surplus Lines filing to Massachusetts!

For a complete overview of all implemented states, the filing types they accept, and their due dates, go to the State Participation page on the [OPTins website](#).



Tips, Tricks, and a Treat or Two

Tips are good, right? You tip your server for good service and a sharp tip on a pencil is easier to write with, right? Allow us to offer a few helpful tips on completing forms in OPTins. Following these tips will help eliminate submission errors:

- Always review the State Instructions for submission before completing your forms and submitting your filing. These instructions should answer any questions about state filing requirements.
- Always use the form that is incorporated within OPTins or, if you're filing through TriTech, use the PREMIUM Pro form. Don't scan and upload a form into OPTins. Instead download the state form from the 'Submission Steps' page and upload the completed electronic version.
- In the 'Day' field on any form – enter just the number of the day, nothing else. For example, enter 6 not 6th.
- Ensure that the information that you enter does not contain a space at the beginning or the end of your entry. Spaces are considered characters and will cause an error message.
- If a state has an area for an electronic signature, please use an Adobe electronic signature. Users can create their own, personal electronic signature from within Adobe Acrobat. Directions on how to create an electronic signature can be found inside of Adobe Acrobat Help.

We want our users to find value in the system and utilize OPTins in all states for all available filing types. If you have any questions or need further clarification, please contact the [OPTins Help Desk](#) or call 816-783-8990.



Do you need an overview of upcoming state due dates? Have you found yourself wondering about recent OPTins updates? Maybe you just want to catch up on prior issues of The Scoop? You'll find this information and much, much more at www.optins.org.

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.

Something New Just For You!

Did you know that all of the User Admin functions are now incorporated into special forms so that all requests can be submitted directly from within the OPTins application to the Help Desk?

Users who've been assigned the User Admin role will see the following links on the Settings tab: Request New User, Request User Update, and Request User Deactivate.

Special notes to consider:

- If you are requesting user role updates, check or uncheck only the roles that are *changing*. Leave everything else as it is.
- The 'User' dropdown on the 'Request User Deactivate' and 'Request User Update' forms is the User for whom you are requesting changes. You can request changes for yourself or for other Users.



The User Admin forms generate an email to the OPTins Help Desk, so changes aren't effective immediately. You will receive an email from the OPTins Help Desk when the changes are complete.

If you do not see the User Admin links, but believe you should be the User Admin on your Account, please contact the [OPTins Help Desk](#).

Did You Know?

Attention TriTech customers! Did you know that you can submit your forms and payment to OPTins participating states by clicking the "E-File" button in TriTech?



If you haven't already, provide us with your TriTech Account Number. Once this information has been updated, you can log directly into the TriTech system, create your forms, and click on the "E-File" button. This will take you into the OPTins system so you can enter the tax payment due and submit your payment and form securely and simultaneously to the state. It's really that easy!

If you're not sure whether your company is set up to file through TriTech, contact the [OPTins Marketing Team](#) or call 816-783-8787.

Happy Holidays!

It's hard to believe that there are only two-months left in this fantastic year! Before the year slips away, the OPTins Staff would like to take a moment to thank all of our users for their support, great suggestions, kind words, and patience.



However you celebrate the Holidays, may it be filled with happiness, health, friends, family, and fun. We'll see you next year!

Three Questions With...Product Specialist II - Brandy Woltkamp!

What is your role on the OPTins team?

I work with the OPTins states to build their configuration and to ensure that tax forms are built correctly. I also strive to add additional states so our users can have one place to go in order to file all their premium tax or surplus lines filings to the states. In addition to working with states, I also implement our industry users so that they can utilize OPTins for filings.

What is the one question that you hear most often from OPTins users?

"I am trying to submit my filing and am receiving an error, why?" I'd like to remind industry users that they must use the state provided form within OPTins and all applicable fields must be completed before submission. To download the state provided form from OPTins click on the download icon to the left of the form, and then click on File and Save As...to save the document to your computer. Electronically fill out the form, save it, and Upload into OPTins.

Final thoughts?

First, I would like to thank both industry and state for choosing to use OPTins. I would tell OPTins industry filers to pay attention to the state instructions and requirements. These could change from one filing period to another. This information is always available and is very important to review every time you submit a filing.

OPTins states, one important tool that we now have available is an expanded complete export. If you cannot use XML but would like to report on what is included on the tax form, contact the [OPTins team](#) to find out more about this enhancement.

