

OPTins "Scoop"

Issue 8

Quarterly Insight for State and Industry

September, 2010



You Asked...We Listened!

We asked industry users how we could improve OPTins and one of the suggestions we heard over and over was that you'd like to be able to schedule filings to be submitted at a later date.

We listened! Industry users now have the option of saving the filing as a draft, submitting the filing on the date created, or scheduling the filing to be submitted at a later date.

When you get to the final step in the 'Create Filing' process, you'll see a 'Process Date' field. OPTins will default to the current date. If you'd like to schedule the filing to be submitted at a later date,

simply choose the date from the calendar picker. Keep in mind, it is important to pay attention to the state deadlines and you must allow enough time for the payment



to process and be received by the state – at least two business days. If you want to save your filing as a draft to be reviewed and submitted by someone else in your office, simply click the 'Save as Draft' button.

The release notes reviewing all of the changes in 3.2 can be found at www.optins.org. Click on the 'Release Notes' button. Users can also review the updated [User Manuals](#).

Do you have ideas for future enhancements? We want to hear about them! Simply fill out the brief survey found on the [OPTins Splash Page](#).

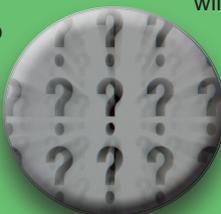
Did You Know?

You are receiving this email because you've entered your email address in your OPTins User Preferences.

It is important to keep your data in these fields updated, not only so we can reach you, but so the states can reach you regarding a filing, if necessary.

In addition, if there were an unexpected problem with a

scheduled filing, the system will generate an automatic email to you, the OPTins user. If your email address isn't correct, you will not receive notice of the scheduled filing issue.



To access your User Preferences, click on the Settings tab, then click on the 'Edit' button to make any necessary

changes.

Oklahoma Makes 11!

It's official! Oklahoma will begin accepting Premium Tax and Surplus Lines Tax filings via OPTins!

For Premium Tax filings, using OPTins is optional with the 9/15/10 estimated filing, but will be mandatory as of the 12/15/10 estimated filing.

For Surplus Lines Tax filings, using OPTins is optional for the 3rd quarter estimated filing,

but is mandatory as of the 4th quarter 2010 estimated filing due on 1/31/11.

Good news for you – since you're already signed up to use OPTins, you can automatically start filing in Oklahoma!

If you have any questions, feel free to contact the OPTins Marketing Team at optinsmktg@naic.org or 816-783-8787.

Check Out the New OPTins Website!

It's been a long time coming, but the time has finally arrived! We have an OPTins website – www.optins.org. Bookmark it and check it out often!

You can now log into the OPTins application via the website, just click on the button in the top right section of the page.

In addition to an easier way to

access the application, you'll find important news, an overview of all state deadlines and filing types accepted, release notes, and previous Scoop issues.

Tell us what you think of the website – optinsmktg@naic.org.

Home NAIC Contact Us Help

OPTins Online Premium Tax for Insurance
A Product of NAIC

Many Tax Options...

Getting Started FAQs Cost Benefit Model State Participation Release Notes OPTins Scoop

Make OPTins Your Electronic Tax Filing Solution!

OPTins is your electronic filing solution, facilitating premium tax, surplus lines tax, assessments, and other state-specific tax filings.

Users log into OPTins, upload their state-specific tax forms, enter the applicable fee amount, and click "Submit."

Click Here to Login to OPTins

Additional Links

- TriTech
- NAPSL0
- Insurance Tax Conference

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New OPTins Status Indicators

The recent release of 3.2 included many exciting changes, one being the addition of a new system status field - OPTins Status.

OPTins has always included the State Status options, which are manually updated by the state depending on where they are in the review process. The new OPTins Status indicators will automatically update based on specific changes in the filing on the industry side. The OPTins Status indicators are searchable by the industry as well.

OPTins Statuses include:

- **Draft:** a filing has been created and saved prior to submission;

- **Payment Failure:** a scheduled filing has failed and the user needs to take action in order to submit the filing;
- **Scheduled:** a filing has been scheduled for a submission on a future date;
- **Submitted:** a filing has been submitted successfully to the state.

Industry users will see both State and OPTins statuses from within the filing. State users will only see the State Status from within the filing. For more information, review the updated industry [User Manual](#).

What Does THAT Mean?

You're creating a new filing in OPTins. You are prepared to upload your form into the system and you get an error message, something like this: **"The required field [name of the missing field] has no data. One or more of the PDF attachments from the previous step must be modified. Please complete all the required fields and reattach the corrected PDF(s)."** Ahhh!! (silent scream) What does that mean?!

If you've printed, scanned, and then uploaded the form into OPTins, you will receive an error message similar to this.

The proper procedure for all OPTins forms is:

- 1) Download the form from OPTins to your computer or network and save it.
- 2) Complete the form and

save your changes.

- 3) Upload the form back into OPTins and finish creating your filing.

This process maintains the integrity of the fields on the PDF so the states can extract the necessary data.

If the state requires, for example, a signed, notarized document, you can scan the signed document in and upload it under Supporting Documentation in order to avoid the error message.

For more information, please review the updated [User Manual](#), or contact the OPTins Help Desk at optinshelp@naic.org or 816-783-8990.

Calling All States!

Attention states! It's that time again. Please begin to review and revise your 2010 annual forms and 2011 estimated forms. If either form will have changes please email the new form(s) to the OPTins team at optinsmktg@naic.org so that they can be formatted and placed within OPTins.

If you will not have changes to your annual form, please send a courtesy email to optinsmktg@naic.org and let us know that your form is not changing.



Did We Mention Manuals?

We've mentioned this a few times throughout the Scoop, but in case we didn't make ourselves clear - we've updated the User Manuals for both state and industry users!

The manuals are bookmarked and linked from the Table of Contents for easy topic searches.

Click [here](#) to access and review the manuals at any time.



Who's Your Back-up?

As an added layer of protection, OPTins will generate a message to both the user who created a filing, as well as a back-up contact in the unlikely event that a Scheduled Filing submission was unsuccessful.

This feature was just implemented with the recent OPTins 3.2 release, so if you did not recently sign-up to use OPTins, you will need to add the back-up contact email address to your Account.

Click on the 'Settings' tab, then click on the 'Entities' link. Click on the 'Edit' button and enter the back-up contact email address, then click 'Save'.

It is important that you add your back-up email contact, so if you need assistance, please contact the [OPTins Help Desk](#).

