

OPTins "Scoop"

Quarterly Insight for States and Industry

Issue 11
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Microsoft Excel and OPTins - Buddies at Last!

You asked for it and we listened! We recently contacted our OPTins surplus lines states and some of our OPTins surplus lines filers to discuss their workflow process and to find out how OPTins could help speed up the filing process.

We learned that many of the states would be willing to accept Microsoft Excel spreadsheets for their tax forms versus the current Adobe Acrobat PDF form. Therefore, the upcoming OPTins release v4.1 will include functionality allowing filers to submit their tax forms to states in Microsoft Excel format.

This new functionality will mainly apply to

surplus lines filers and will be available on applicable tax forms if a state chooses to implement the functionality. Once a state chooses to use the functionality, OPTins staff will work with the state to implement. Once implemented, surplus lines filers will see the Microsoft Excel form available for download.

The process to complete the Microsoft Excel tax form will be the same: the filer will download the form to their computer, complete and save the form, and then upload the form back into OPTins. The Microsoft Excel tax form will contain the same validation that the Adobe Acrobat PDF tax forms contain to ensure you are submitting the appropriate information to each state.

Surplus lines filers who use a back-office system to generate their tax forms will likely need to make modifications to their back-office system to match the fields in the Microsoft Excel tax forms. Once that process is complete, simply copy and paste the fields from the generated report into the Microsoft Excel tax form. Let the time-saving "happy dance" begin!

Reporting functionality will not change for state users. States will be able to run reports on any fields built into their Microsoft Excel tax form.

Do you have a great idea that you believe would improve the OPTins filing or audit process? Click [here](#) to complete our Enhancement Survey.

Two More OPTins Jurisdictions!

We love to report when jurisdictions show their support for OPTins and lucky for you, we have TWO additional jurisdictions to announce!

Effective June 1st, New York began accepting Assessment filings through OPTins - Fire Insurance Fee and Motor Vehicle Law Enforcement Fee. Filings for Motor Vehicle Liability Security Funds will soon be accepted.

The Virgin Islands will also soon be accepting filings for Premium Tax and Surplus Lines. The exact date has yet to be determined for this implementation.

As a reminder, once you've implemented and are using OPTins, you can automatically file in all states as they come on board. Keep an eye on the OPTins [website](#) for a complete list of all active states.



The 411 on User Admin

All User Admin functions are now incorporated into special forms built into OPTins, so that all requests can be submitted directly from OPTins 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 at optinshelp@naic.org.

Hot Right Now - Dot Org!

The OPTins web site is hot, new, hip, trend-setting... OK, that may be a slight exaggeration, but it is helpful and informative, and packed with important information!

Learn more about which states accept OPTins by reviewing the [map of participating states](#). The map includes an overview of the filing types they accept and their specific due dates.



by using OPTins? Then check out the [Cost Benefit Model](#) which compares the cost savings of the electronic OPTins filing process over the paper filing process.

Users can keep up on system enhancements by reviewing the [OPTins Release Notes](#), read through previous issues of the [OPTins Scoop](#), and find answers to frequently asked questions by reviewing the [FAQs](#).

Have you wondered how much money your company can save All of this and much, much more can be found at www.optins.org.

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Get to Know...Product Specialist II - Kelly McCumber

You've heard the jokes like, "What do you get when you cross a snake with Legos?" The answer: A Boa Constructor. Or what about, "What do you get when you cross Emily Dickinson with Ozzy Osborne?" The answer: Kelly McCumber. And that's no joke!

Kelly McCumber is a Product Specialist II on the OPTins team. If the "joke" didn't give it away, she's an avid writer and self-proclaimed "music junky."

She has lent her skills to writing commercials for local businesses, writing articles for industry publications, writing for and editing the OPTins Scoop, and is the author of her own super-secret blog. Oh, and

lest we forget, she's an avid concert goer.

When Kelly isn't writing or rocking, she's working. One of her favorite aspects of being a Product Specialist is watching OPTins grow and develop. She said she feels a sense of accomplishment when she and the team brainstorm ideas and watch them come to fruition through new release enhancements.

The OPTins team recently conducted an OPTins training tutorial that received fantastic feedback. Kelly's advice to OPTins users is, "If you didn't have the chance to attend our first tutorial, make a point to attend our next tutorial. You'll learn a lot!"



Class is In Session!

Our first OPTins tutorial was such a success, we're planning on offering one per quarter. The tutorial reviews the filing process and is perfect for OPTins users of all levels.

Keep an eye out on your email for the next tutorial notification. The date has been tentatively set for mid-to-late summer. Space is limited to the first 100 participants.



Keep Your Entities Updated - It's as Easy as Pie!

As more states begin to accept OPTins, users with the Filing Entity Maintainer role will need to keep the Entities on the Account updated. This includes adding new Entities as well as updating the state license numbers for each of the existing Entities.

To add a new Entity:

- * Log into OPTins;
- * Click on the 'Settings' tab;
- * Click on 'Entities';
- * Click on 'Add Entity';
- * Choose whether you're adding a 'Company' or an 'Individual';
- * Enter data into all applicable fields;
- * Click 'Save'.

To update the state license number on an Entity:

- * Log into OPTins;
- * Click on the 'Settings' tab;
- * Click on 'Entities';
- * Choose the Entity to update;
- * Choose the states from the 'State' drop down menu and enter the License number;
- * Click 'Save'.

For a complete overview, reference the [OPTins User Manual](#).



OPTins
Online Premium Tax for Insurance
A Product of NAIC

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.



Let Your Voice Be Heard!

Send this to the state with your next paper filing.

**States,
Make OPTins Your Electronic Filing Solution
so we can, too!**

**Contact the OPTins Marketing Team at
816-783-8787 or optinsmktg@naic.org.**