



FREQUENTLY ASKED QUESTIONS

Are electronic signatures acceptable?

Yes

I only see filing checklists on your website, where are the premium tax forms?

Our office now requires all premium tax forms, payments, and supporting documents to be filed electronically, through the NAIC's OPTins electronic filing system, at www.optins.org.

My filing checklist no longer lists a signed jurat and a certificate of compliance as required submissions. Is this correct?

Yes, if your particular filing checklist indicates that you do not need to file these or other items, you no longer need to submit them.

I can't find the following forms:

- Genetics Program Charge Form
- Report of Insured Montana Residents
- Small Employer Group Activity Report
- Funeral Insurance Activity Report
- Medical Malpractice Liability Experience Report

The Small Employer Group Activity Report, Funeral Insurance Activity Report, and Medical Malpractice Liability Experience Report are no longer required. The Genetics Program Charge and Report of Insured Montana Residents have been incorporated into the appropriate premium tax forms. Therefore, there is no longer a supplemental documentation spreadsheet to complete and upload in OPTins.

When I go into OPTins, I don't see the supplemental documentation spreadsheet that I've had to complete and upload in the past.

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Why won't OPTins allow me to file my return without completing each line and paying the total amount due?

For quality control purposes, each tax return must be completed in full, and the total amount due must be submitted with the return, in order for the return to process through OPTins.

I'm a Montana-domiciled pure captive insurer and do not see a captive insurance premium tax return in OPTins.

In OPTins, you must indicate what type of annual statement blank you file with the NAIC. If you are a Montana-domiciled pure captive insurance company, please select Not Required to File. Making this selection should allow you, in a subsequent screen, to select a captive insurance return to complete.

I'm a fraternal benefit society and cannot find my tax form in OPTins.

Fraternal insurers do not file through OPTins. Please click on the Fraternal Insurers link at csimt.gov/insurance/annual-renewals-taxes, to find the appropriate form that you will complete and submit to our office.

Some of the Fire Tax premium allocation rates changed, effective mid-2023. Do I have to prorate my premium accordingly?

No, the new rates should be used for the entire year.

Who do I contact if I have additional questions?

Please email your questions to CSIExams@mt.gov or call our office at 406-444-2040 and ask to speak with an Exams Bureau employee.