

## 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](http://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

All supplemental forms must now be submitted electronically, through the NAIC's OPTins electronic filing system, at the time your premium tax return is filed. Due to changes in our policies, we can no longer accept these reports in hard copy or by email. The forms are available for completion, in OPTins, in a supporting documentation spreadsheet. Please coordinate the filing of these forms with your tax return preparer. If you have already filed your premium tax return, it may be amended to complete the applicable forms.

### Why won't OPTins allow me to file my return without uploading the supplemental forms spreadsheet, even though I have no data to report on the forms therein?

Previously, many filers were confused over what to upload. Therefore, both the premium tax return and the supplemental forms spreadsheet must be submitted through OPTins, even if there is no data to report on any of the forms in the spreadsheet.

### I have no data to report on the Genetics Program Charge Form, why is OPTins requiring me to complete it?

If the supplemental documentation spreadsheet for your company type contains the Genetics Program Charge Form, you must complete it, even if you have zero insureds to report on it. This requirement was necessary to ensure that the genetics program data our office receives is complete.

### I'm using PremiumPro and cannot find the supplemental documentation spreadsheet.

A certain version of PremiumPro does not include the supplemental documentation spreadsheet. You will need to go into OPTins and obtain it there.

### 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.

### Can your office accept a wire transfer or a paper check, in lieu of a payment through OPTins?

We are sorry, but we cannot accept wire transfers for premium tax payments. In addition, paper checks are no longer allowed for premium tax payments, including all applicable fees, such as the Genetics fee.

### Who do I contact if I have additional questions?

Please email your questions to [CSiExams@mt.gov](mailto:CSiExams@mt.gov) or call our office at 406-444-2040 and ask to speak with an Exams Bureau employee.

 406.444.2040

 840 Helena Avenue  
Helena MT 59601

 [csi@mt.gov](mailto:csi@mt.gov)

 [csimt.gov](http://csimt.gov)

Get social with us on

